Cyfoeth Naturiol Cymru
Natural Resources Wales

Welsh Outdoor Recreation Survey

Key Facts for Policy and Practice

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This Welsh Outdoor Recreation Survey is supported by a comprehensive Full Report and Technical Report. These, along with full data tables, are available to download from the Natural Resources Wales website.

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Section 1:

Introduction

What do we know about outdoor recreation in Wales? We've all seen people out and about, playing on the beach, hiking in the hills, or walking the dog, so why have a national survey on outdoor activities?

The Welsh Outdoor Recreation Survey helps us answer many questions that we can't find out about from what we see 'on the ground'. It provides robust evidence on:

- exactly how many people use the outdoors, and how often they visit
- the activities that people currently do and the places they visit
- their barriers and motivations
- whether outdoor recreation is changing, and what people would like to do in the future
- the health benefits of participation, and an understanding of equality

This Summary Report gives an overview of the main survey findings, and provides a number of recommendations in response to the key challenges that we now face.

Welsh Outdoor Recreation Survey

The 2011 and 2008 surveys were commissioned by the Countryside Council for Wales and the Forestry Commission Wales (now Natural Resources Wales), and is the largest survey of participation in outdoor recreation by people living in Wales. It is representative of the adult population, covering all areas in both towns and countryside, along with all ages and backgrounds. The interviews were conducted over a 12 month period, so take account of any season differences in participation.

This Summary Report is supported by a Full Report and Technical Report, which are available to download from the Natural Resources Wales website.

Section 2:

Who participates in outdoor recreation?

One of the key questions asked by the survey was who takes part in outdoor recreation? And the clear answer was . . .

most people do!

Overall, we found that 95% of adults in Wales have taken part in some type of outdoor recreation at least once in the last year.

Part of the reason that this figure is so high is because it includes so many different activities and places . . . everything from climbing amongst the high mountain tops, to having a picnic on the beach, or taking children to the local playground.

BUT . . . although it is good that so many people make use of the outdoors, there are some significant challenges.

Although most people have taken part in outdoor recreation occasionally, far fewer take part on a more regular basis . . .

only 27% of people are frequent participants.

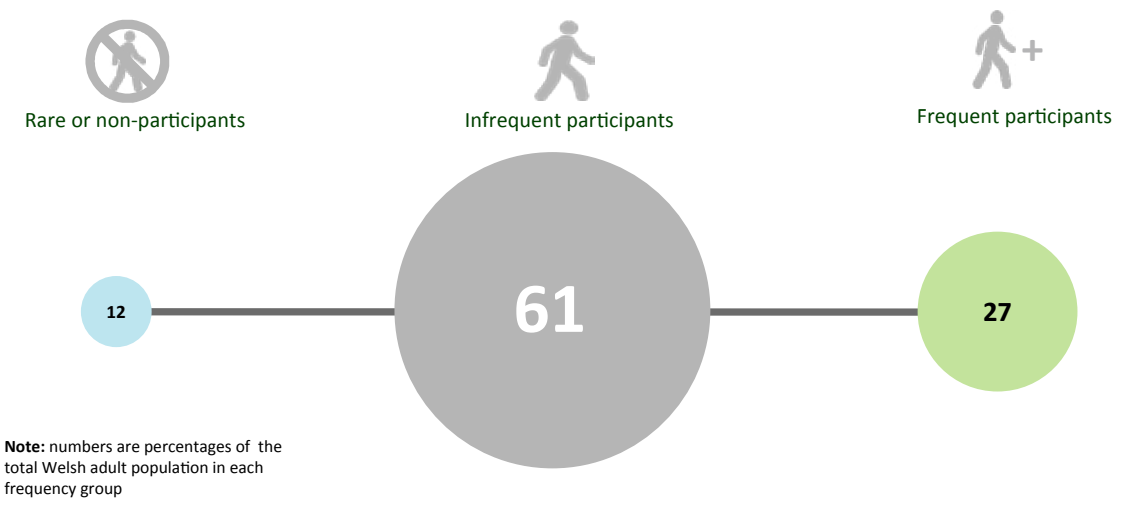
Participation has also 'plateaued' – there has been no significant change in the overall level and frequency of visits to outdoors between 2008 and 2011.

A key challenge will be to find ways of

increasing the frequency

of participation to get more people out there enjoying the outdoors on a regular basis.

Graphic 1. Most participate, but few are frequent participants



Section 2: continued

Who participates in outdoor recreation?

Equality of opportunity is important in all aspects of life, and participation in outdoor recreation is no exception. So we looked at the relative participation from different groups in society, and found that . . .

demographics are more important than deprivation.

Overall, the lowest levels of participation were from older people (especially those over 75) who also have a disability. Despite our expectations, living in a deprived area had little or no effect on differences in participation.

Graphic 2. Demographics have a greater impact on participation than deprivation

Note: numbers are percentages of each demographic group in each frequency group

Section 2: continued

Who participates in outdoor recreation?

"I wandered lonely as a cloud . . ."

Wordsworth's poem still evokes a sense of walking over the hills in solitude, but is that the reality for outdoor recreation today?

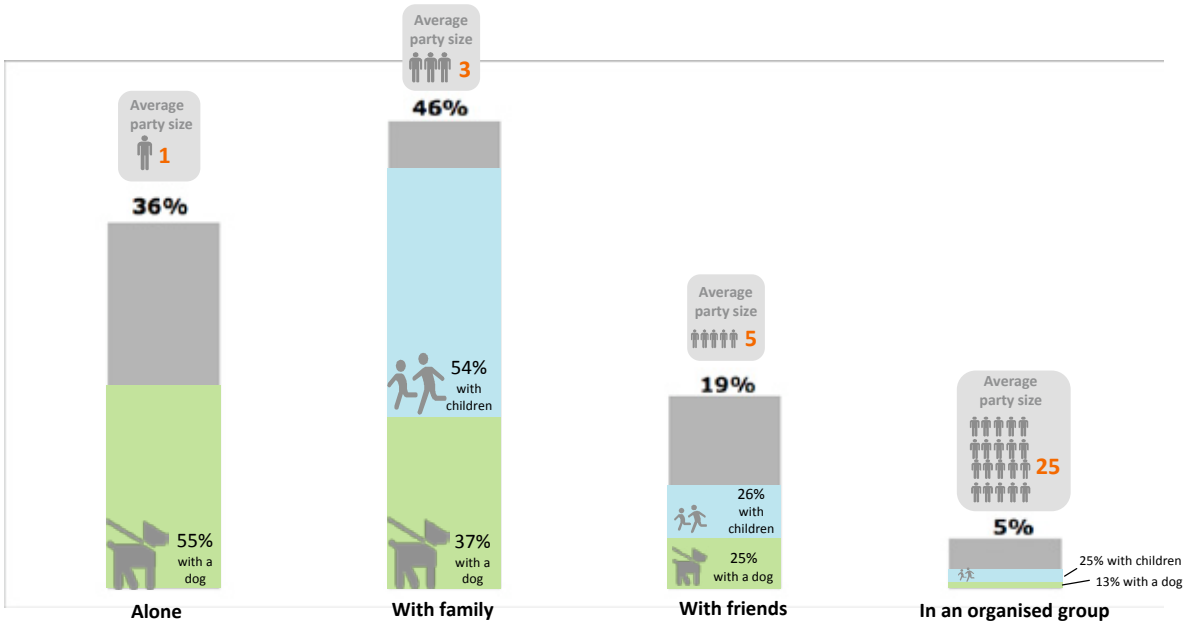
The survey found that outdoor recreation is more of a **social activity** nowadays. The majority of people visited the outdoors with either their family or friends, with just over a quarter of visits also being made with children. It would also appear that "man's best friend" is a regular companion, with 40% of visits being made by people with a dog.

Solo trips are still very common however, with over a third of visits made by people on their own. But only 5% of visits were made as part of an organised group, raising some challenges as to how we communicate with outdoor users especially in relation to responsible behaviour.

We did find that over half of the people who visited on their own had a dog with them, possibly providing companionship or a sense of safety, whilst not surprisingly people who were part of a family group were much more likely to have children with them.

> We need to take greater account of the visits made by people with a dog, families with children, and groups of friends.
>
> What are their needs and barriers? And how can we engage and communicate with them?

Graphic 3. Outdoor recreation is a social activity



Section 3:

What people do

Traditionally, outdoor recreation has been seen as 'countryside' activities, largely involving pursuits such as hillwalking or climbing. These activities are still very important types of outdoor recreation, but increasingly we have come to understand that it's not all about woolly socks and mountains . . .

People enjoy the outdoors in many different ways, and we tried to incorporate this diversity into the survey, measuring participation in 19 different activities from playing games and picnics, to watersports and horseriding. But increasingly

people don't just do one activity,
they are 'multi-activity'.

We found that the majority of people take part in 'low input' activities. These are things that are easy to do, require few skills or equipment, take little physical effort, and are convenient to access. They include activities like walking, sightseeing, taking children to playgrounds, picnicking, playing informal games, and watching wildlife.

There are also a substantial number of people taking part in more active pursuits, especially running, road cycling, outdoor swimming, or mountain biking. These are increasingly popular, often as a 'lifestyle' activity.

In contrast, there are very low levels of participation in most 'traditional' forms of recreation, such as fishing, climbing, and horseriding.

Activities included in the Welsh Outdoor Recreation Survey

Walking (short walks; hill walks)
Road cycling
Mountain biking
Horse riding
Fishing
Climbing or Caving
Motorised Watersports
Non-motorised Watersports
Outdoor Swimming
Snowsports
Wildlife Watching
Running
Sightseeing
Off-road driving
Picnicking
Visiting children's Playgrounds
Informal Games (Frisbee etc)
Field Sports
Air sports

Section 3: continued

What people do

Are people changing what activities they do?

The survey found that there had been an increase in a diverse range of activities:

- Social pursuits: visiting children's playgrounds and informal games
- Nature-based pursuits: wildlife watching
- Active pursuits: road cycling, mountain biking and climbing / caving

But in contrast there hasn't been any change in more traditional outdoor recreation, such as walking, sightseeing, and horseriding, nor in water-based activities like fishing or watersports.

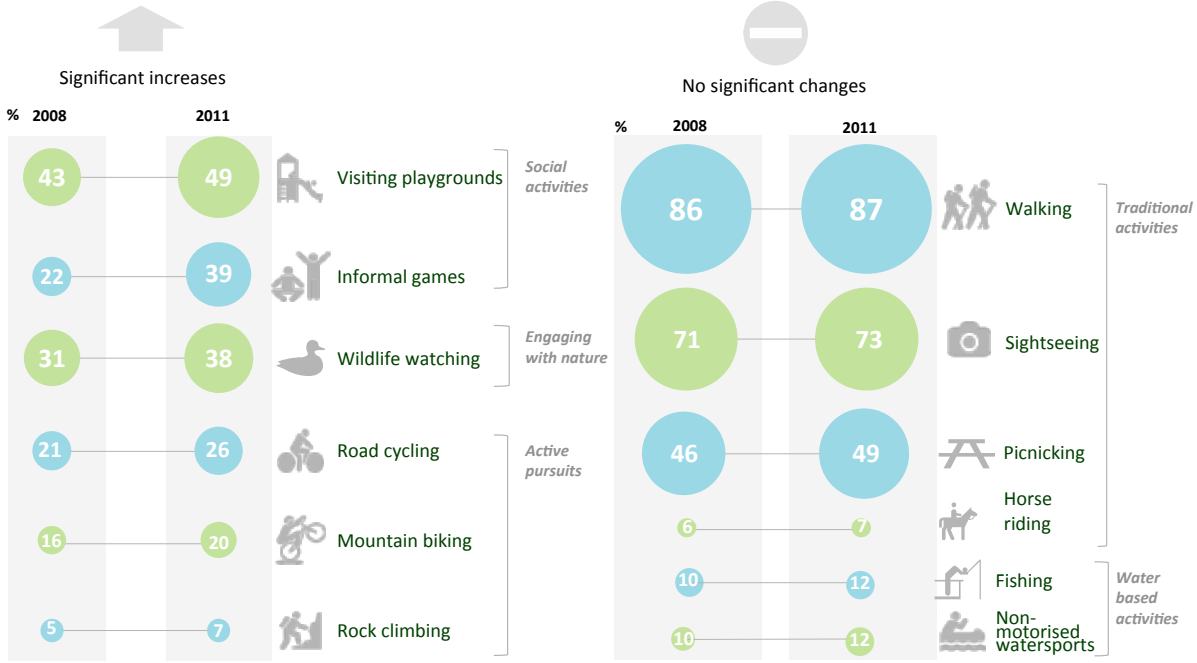
So what does that tell us?

If the level of total participation hasn't changed, then how can some activities have increased? To understand this anomaly, we looked at what people were doing in more detail, and found that

the number of people taking part in walking as their only activity has declined.

Instead, people seem to have become more multiactivity, taking part in a wider range of both social and active outdoor pursuits.

Graphic 4. Changes in the types and range of activities



Note: numbers are percentages of population undertaking each activity in previous 12 months

Section 4:

Where people go

The 'outdoors' means different things to different people, from the wild mountains to more developed parks, and covers both land and water. So as well as broadening the definition of outdoor recreation to include all informal outdoor activities, the survey also included a wide range of places.

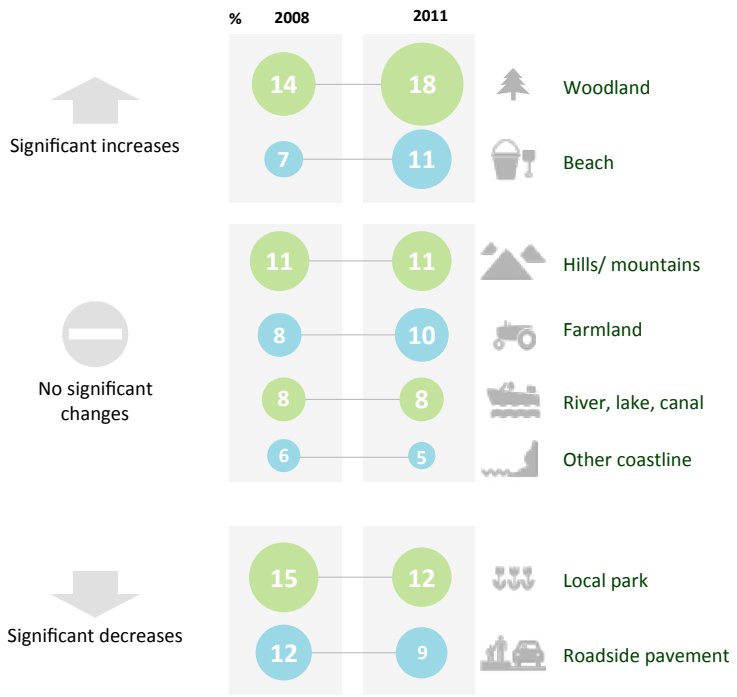
The most commonly visited places were woodlands and forests, with a smaller number of people going to local parks, hills and moors, beaches, and farmland. 'Bluespace' was less visited, with fewer visits to inland water such as lakes and rivers, and the sea.

The biggest change in where people go has been an increase in visits to woods and forests, along with to beaches. But there has also been a decrease in visits to local parks, so that

Woodlands and Forests are now the most visited place, taking over from Local Parks.

We need to understand why this. Woodlands are not always the closest place to where people live, so is it because they offer a wider range of activities and facilities which are easy for people to use?

Graphic 5. Changes in the types of places people visit



Note: numbers relate to main destinations of visits taken in each survey year

Section 4: continued

Where people go

So why do people choose to go to different places?

Proximity? Activities? Facilities? Ease of Use?

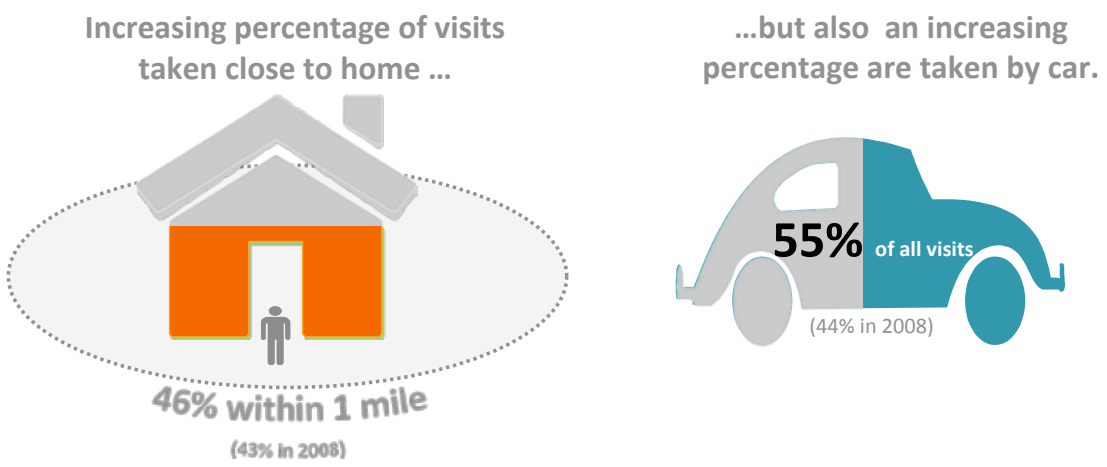
The survey found that the pattern of recreation visits is changing:

- Visits are close to home, and the distance people travel is getting shorter.
- Despite the shorter distances, increasingly most people drive to get there, and fewer people walk.
- People either go for a short visit (1-3 hours) or a day out (4-6+ hours), but the average duration is getter shorter.

Overall, people are taking part in outdoor recreation in increasingly 'bite-sized' chunks – short duration and close to home.

We need to do more work to understand why car use has increased despite the average distance travelled getting shorter.

Graphic 6. Distance travelled compared to car use



Section 5:

Why and why not: the motivations and barriers to outdoor recreation

So why do some people take part in outdoor recreation, whilst others don't? Understanding both motivations and barriers is crucial. It can help us target our messages to different groups, encourage greater participation, and provide more appropriate access opportunities.

The survey asked people why they took part in their most recent outdoor activity. Surprisingly,

the most commonly mentioned motivation was for 'health and exercise'.

Functional and practical motivations were also frequently mentioned, with the need to walk the dog mentioned by a quarter of people. Whilst for others their main motivation was to take part in their specific hobby or activity.

Motivations associated with the pleasurable aspects of the outdoors focused on fresh air and enjoyment, but surprisingly scenery and wildlife were not strong motivations for many people.

We found that peoples' motivations varied depending on their age, along with differences associated with the activities they undertook and the places they visited. In particular:

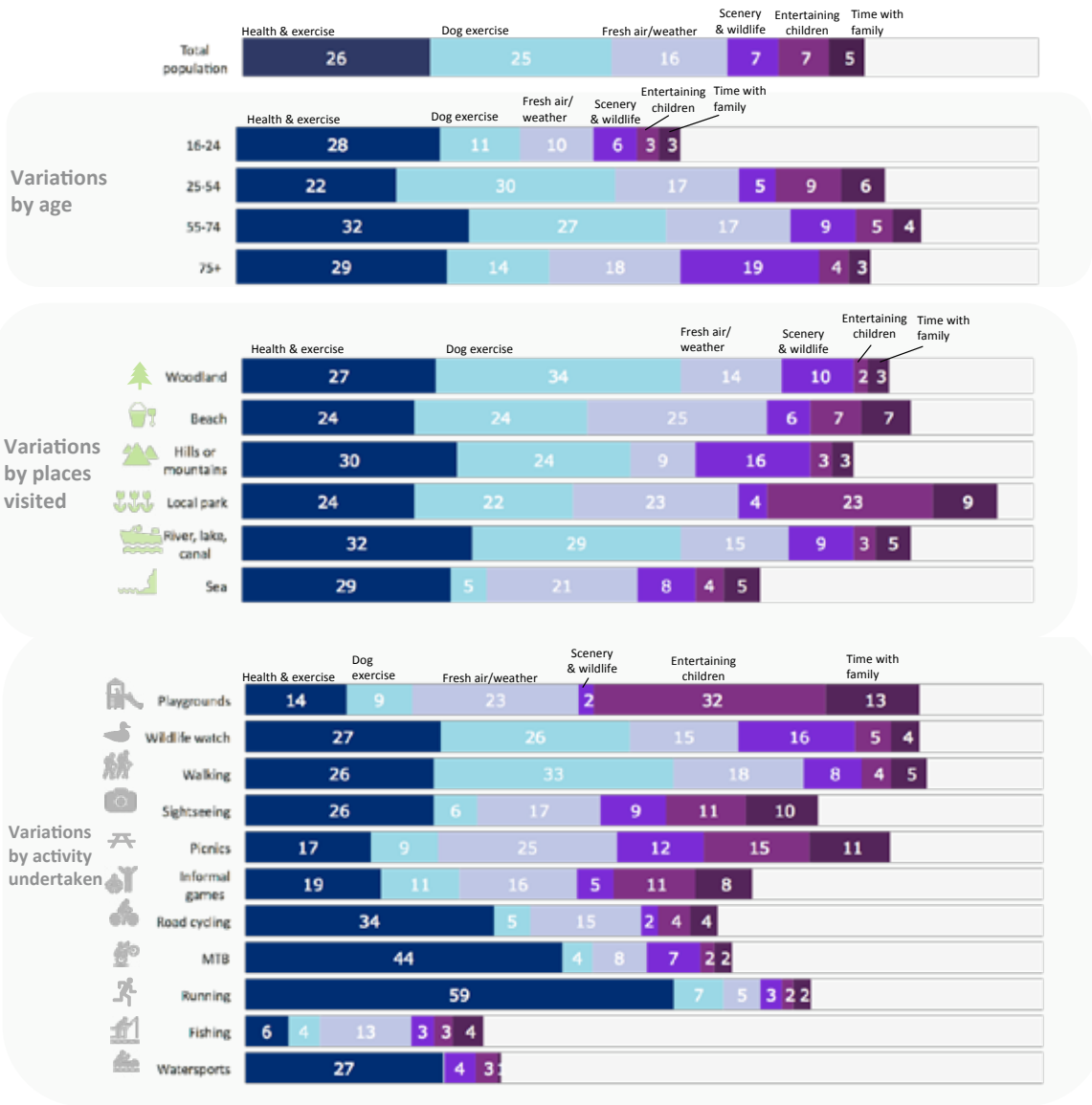
- Older people (over 75) are noticeably likely to be motivated by 'scenery and wildlife'
- Woodlands are particularly appealing to people whose main motivation is to walk their dog
- In contrast, local parks appeal to people whose main reason for being outdoors is to entertain children
- People who engage in more active pursuits, like running, mountain biking, and road cycling are the most likely to be motivated by health and exercise
- Whereas visits to playgrounds and enjoying a picnic are more likely to be done to take advantage of fresh air and good weather.

Understanding how motivations differ by demographics, activities and places will make our interventions more relevant and help increase participation.

Section 5: continued

Why and why not: the motivations and barriers to outdoor recreation

Graphic 7. Variations in motivations for visiting the outdoors



Note: numbers relate to percentages of visits taken for the motivations shown by age group, main visit activity and places visited.

Section 5: continued

Why and why not: the motivations and barriers to outdoor recreation

But what about why people don't take part in outdoor recreation? What, if anything, stops them? Or are they just not interested?

Equally important to understanding people's behaviour is to find out why people *don't* take part in outdoor recreation. The survey asked both why people *never* took part (those who hadn't visited the outdoors in the last 12 months) and why people *rarely* took part (those who hadn't visited in the last 4 weeks).

We found that those who never took part had more absolute barriers, a challenging combination of:

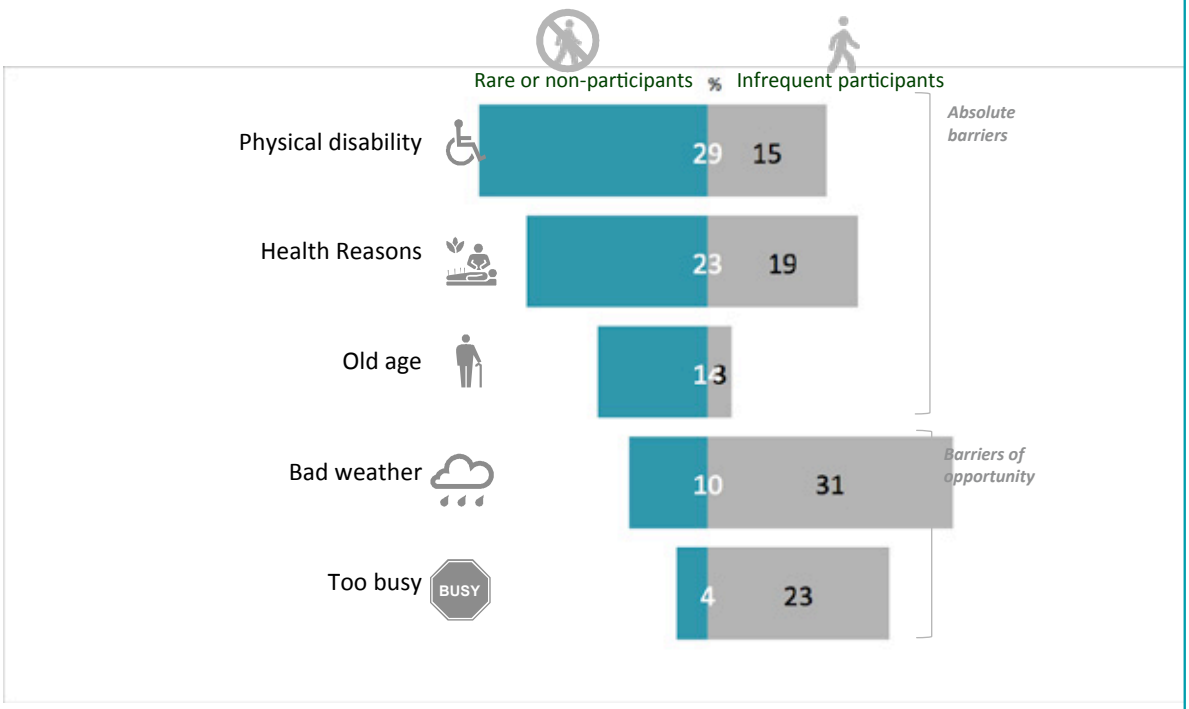
Old Age + Disability + Poor Health

In contrast, rare participants expressed more opportunity barriers, with a combination of:

Lack of Time + Bad Weather

However, the main aspects that we have traditionally addressed, such as a lack of information or places to go, along with cost or transport issues, were rarely mentioned as barriers.

Graphic 8. Variations in barriers to visiting the outdoors



Note: numbers relate to percentages of rare and none participants and infrequent participants providing reasons shown for not taking more visits

Section 6:

Focus on future demand

Trying to understand, and predict, the future for outdoor recreation is obviously difficult. Like any changes in society, it can be subject to a wide range of different influences, many of which we can't foresee. However, the survey does give us an insight into what to expect in the short to medium term.

There are two main ways of trying to understand future demand. One is to look at past changes, and use these to predict what would happen if they continued. The second is to ask people what they would like to do in the future. With this survey we have been able to do both.

Looking back between 2008 and 2011, we have found that there have been some changes to outdoor recreation in the last 3 years. Although the overall level of participation hasn't changed, and people's motivations and barriers have remained relatively static, there are some differences in both the activities people do and the places they visit.

The main changes in outdoor recreation:

- People have become more multi-activity
- There has been an increase in easy-to-do 'social activities (informal games and visits to playgrounds)
- There has been an increase in certain active pursuits (road cycling, mountain biking, and climbing / caving)
- In contrast there has been decrease in people going walking as their single main activity
- There are now more visits to woodlands and forests than there are to local parks
- Visits are increasingly 'bite-sized' – shorter duration and closer to home

It is likely that these changes will continue in the future, especially in the short term.

Section 6: continued

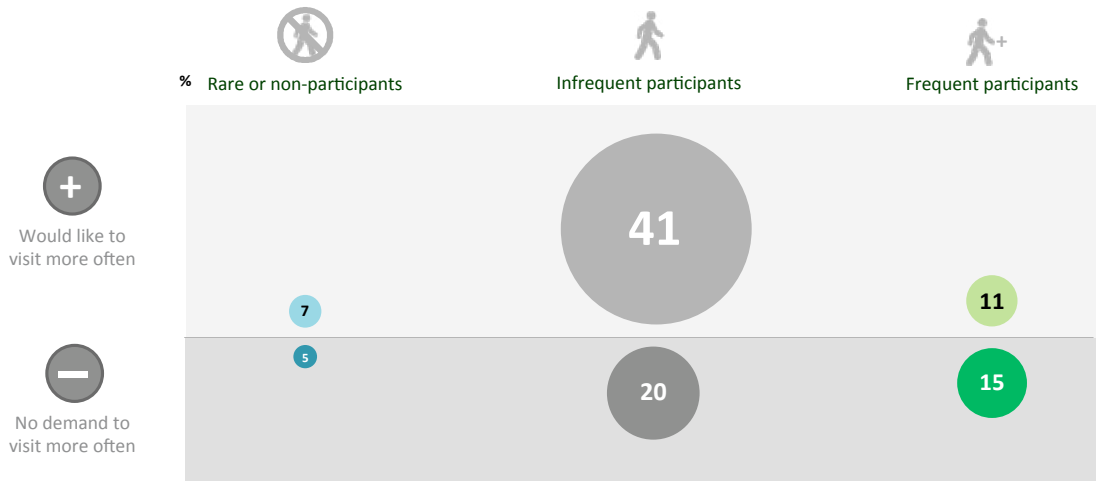
Focus on future demand

We also asked people about what they would like to do in the future. **This gives us an insight into whether people would like to participate more, and if they do, what they would like to do and where they would like to go. Understanding these preferences will help us to decide what sort of facilities and opportunities to provide in the future.**

Overall, the survey found that 60% of people would like to do more outdoor recreation. But who are they?

- The overwhelming majority of people who wanted to participate more are infrequent participants.
- Unsurprisingly, relatively few people who already take part in outdoor recreation at least 5 times a week, want to do more!
- However, the lowest level of demand comes from those people who currently don't take part, with only 7% of people who are rare or non-participants wanting to do more outdoor recreation in the future.

Graphic 9. Levels of demand vary according to frequency of participation



Note: numbers relate to percentages of population in each group. Total is 99% due to rounding

Section 6: continued

Focus on future demand

So what do we know about the people who have said they would like to do more? And how do they compare to those who don't want to participate more in the future?

The highest levels of demand came from:

- young people
- people who are working
- infrequent and rare participants

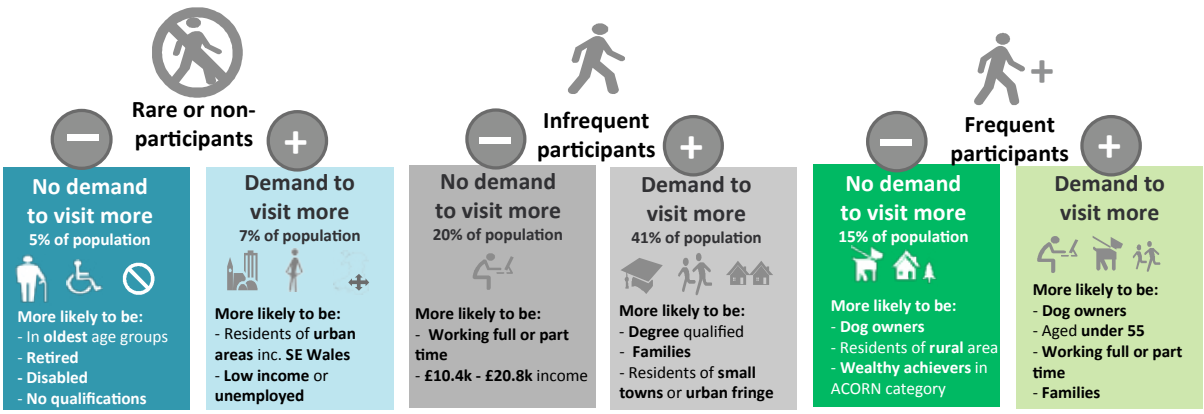
Whilst the lowest levels of demand came from:

- older people
- people who are retired
- frequent and non-participants

The group of people who are "Infrequent Participants with a High Level of Demand" are also more likely than average to be highly educated, with a family, and live in a small town. It is therefore likely that they have a high level of interest in outdoor recreation but are too busy or it is too inconvenient for them to take part.

In contrast, the group who are "Rare / Non-Participants with No Demand" are much more likely than average to be elderly, disabled, and retired. It is likely that they face significant physical challenges which limit both their current participation and the likelihood of them participating in the future.

Graphic 10. Levels of demand vary according to demographic group



Section 6: continued

Focus on future demand

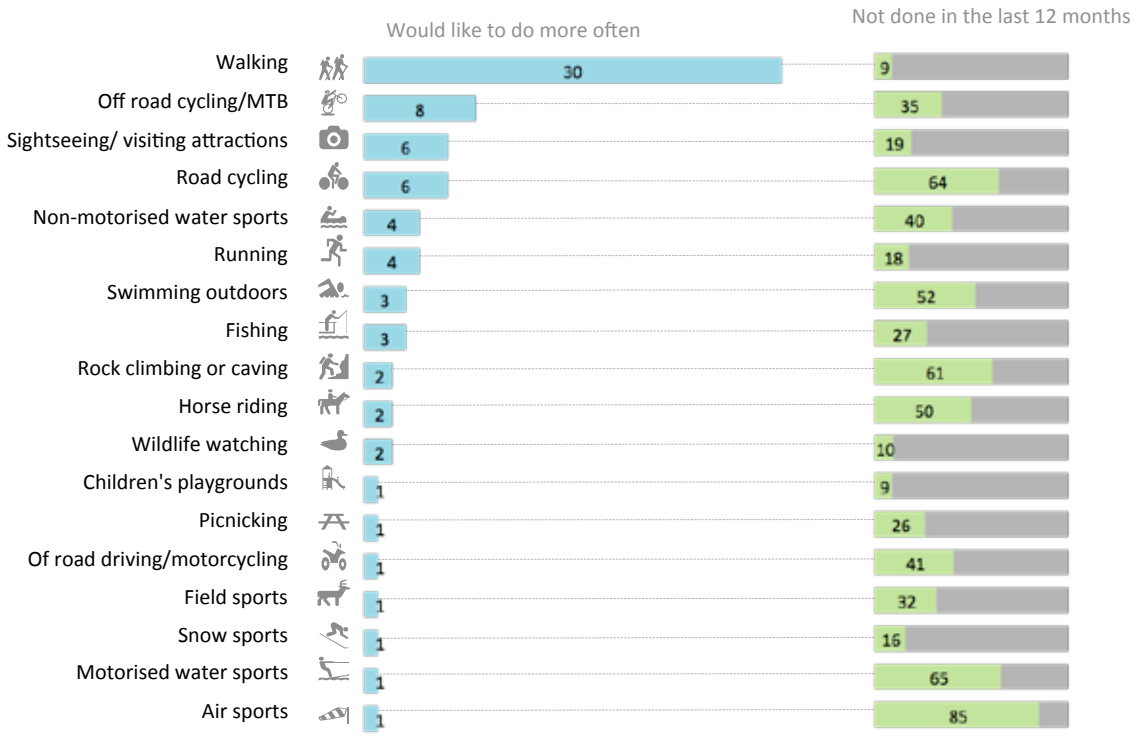
But what would all these people like to do in the future? As we have found with current participation, there isn't a single activity, but rather there are many different outdoor pursuits that people would like to do. Another key question is whether this demand is coming from current participants who are wanting to do more, or are they new participants?

There were high levels of demand for walking, along with sightseeing, but these were also the activities which were most likely to be mentioned by those who were already doing them.

More active pursuits were also amongst the top activities in terms of future preferences, in particular off-road cycling, road cycling and watersports. In contrast to walking and sightseeing, those who said they would like to do this activity in the future are less likely to already be doing it, indicating that

encouraging these more active pursuits could provide significant health benefits to entirely new participants.

Graphic 11. What do people want to do and do they already do it?



Note: numbers relate to percentages of population that would like to participate in each activity more often and percentages who have not undertaken same activity in previous 12 months

Section 6: continued

Focus on future demand

The survey also asked people which types of places they would like to visit in the future.

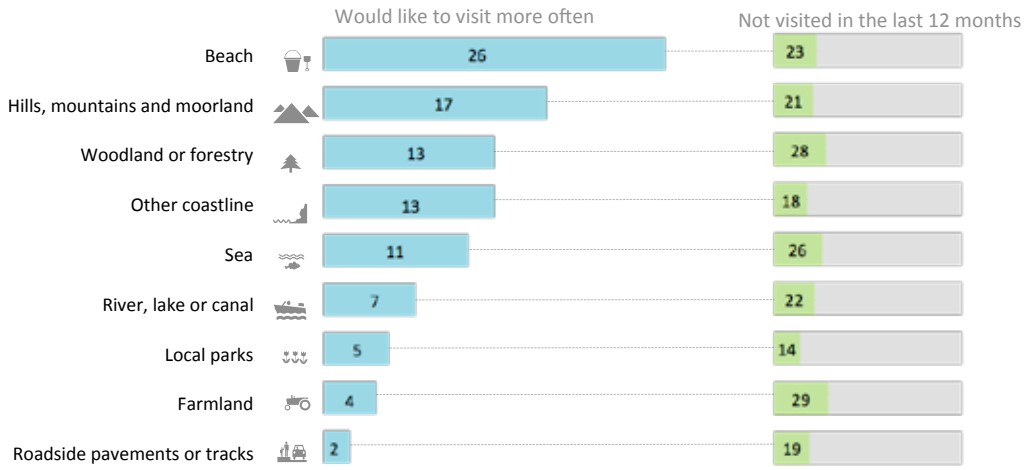
Here we saw a change to current recreation behaviour, as the highest demand was for visiting beaches, followed by mountains and moorland. Far lower levels of interest were expressed for visiting places like farmland and local parks.

People's preferences appear to reflect the appeal of Wales' more iconic places, which offer the opportunity for a special day out. In contrast, 'doorstep' places, although widely used, are less aspirational.

However, given that the survey has also found that outdoor recreation visits are becoming shorter and closer to home, there is a question about whether people's preferences would be translated into actual behaviour, so we need

a balance between special places and doorstep opportunities.

Graphic 12. Where do people want to go and do they already go there?



Note: numbers relate to percentages of population that would like to visit each place type more often and percentages who have not visited this type of place in previous 12 months

Section 6: continued

Focus on future demand

So if people would like to do more outdoor activities, why are they not doing so? Key to understanding this is to look at the barriers that people face that potentially restrict their ability to change their behaviour.

The survey asked people *why* they hadn't taken part in their preferred activities. It was clear that

opportunity barriers

were the main constraint. Most people said the main reason they hadn't participated more was due to being too busy or a lack of time, followed by bad weather. This was particularly the case for people who currently participated, even if that was only infrequently.

In contrast, the main barriers mentioned by people who currently don't participate were more likely to be due to disability and health reasons. These can be seen as

absolute barriers

However, as with current participation, the barriers that have often been assumed to be central in preventing participation, such as cost or lack of transport, are rarely mentioned by people.

Section 7:

Focus on health benefits

With increasing levels of obesity in Wales, and a rise in associated health problems such as coronary heart disease, diabetes, and certain types of cancer, the need to increase physical activity levels has never been greater.

We all know that taking part in outdoor recreation can help people lead healthier lives. But do we know exactly who does, or doesn't gain health benefits from being physically active in the natural environment? And how much of a contribution does participation in informal outdoor activities make to the overall health of adults living in Wales?

To answer this question, detailed analysis of the survey was undertaken to understand the relationship between

participation in outdoor recreation . . .
physical activity . . . health benefits.

This was based on new guidance from the World Health Organisation (WHO) which stated the minimum levels of physical activity required for health, based on:

- Intensity
- Frequency
- Duration

The survey found that the population of Wales is divided into 7 distinct groups, ranging from those who never use the outdoors for recreation to those who are frequent, active participants.

Each 'segment' has a unique combination of frequency, duration, and intensity, and while some gain the 'maximum' health benefits from their participation in outdoor recreation, others will have gained very little if any of the benefits associated with physical activity.

Based on their relative levels of participation, and associated health benefits, we grouped each segment into one of 3 'Zones', based on a 'traffic light' system:

- Those in the 'Red Zone' participate the least, and gain little if any physical activity health benefits;
- Those in the 'Amber Zone' take part in some degree of outdoor recreation, but in different ways fail to meet the minimum level of either frequency, intensity, or duration required for health benefits;
- Those in the 'Green Zone' meet or exceed the minimum levels of physical activity.

The combination of the two segments in the 'Green Zone' represents the contribution that outdoor recreation makes to the physical activity levels required for a healthy life.

Section 7: continued

Focus on health benefits

But are people becoming more or less physically active? Comparing the results from the 2008 and the 2011 survey shows that there has been a

significant increase in the most active 'green' groups

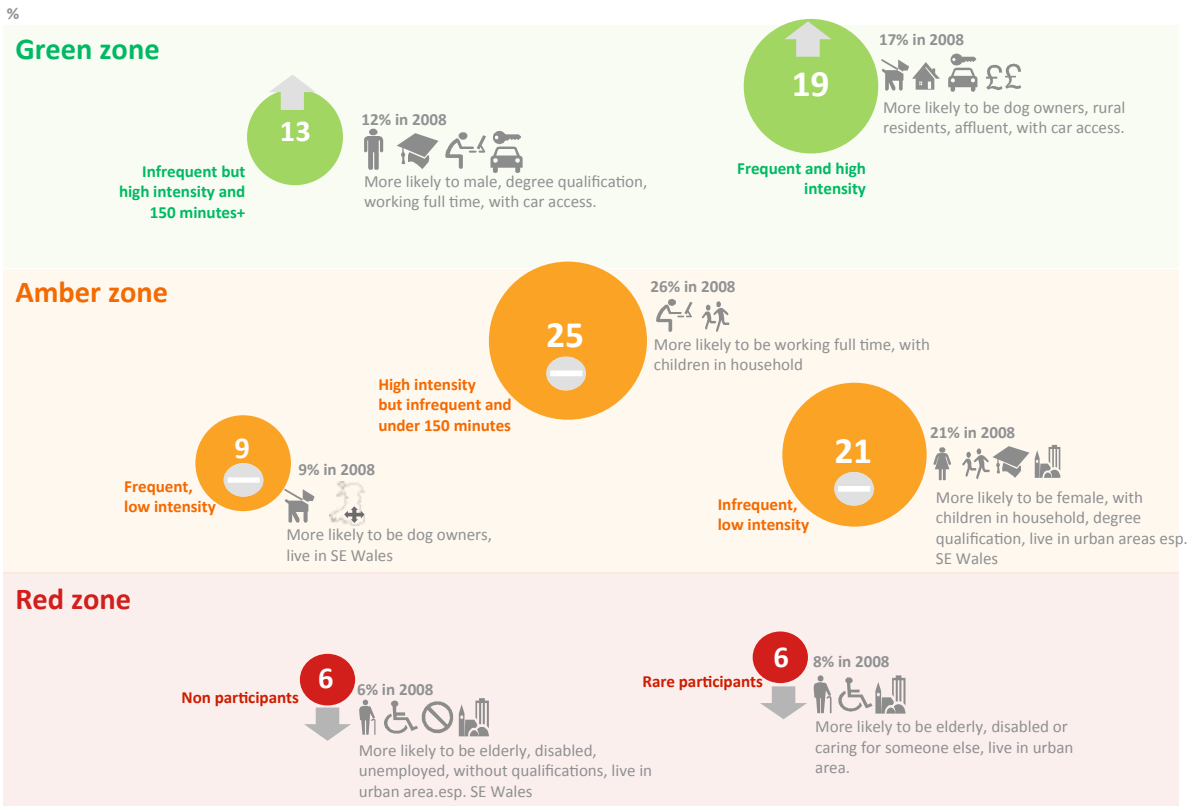
and

significant decrease in the least active 'red' groups.

So participation in outdoor recreation is helping people to 'turn the curve' and increase their physically activity levels and therefore improve their health.

A total of 32% of the adult population of Wales are meeting the minimum level of physical activity through outdoor recreation alone!

Graphic 13. Activity level segments – profiles and changes



Section 8:

Key challenges and recommendations

Outdoor recreation is clearly very popular amongst people living in Wales, with the majority taking part at least occasionally and a high level of demand to do even more. But the evidence from the survey has identified a number of significant challenges, and addressing these will be crucial in order to maximise the benefits that outdoor recreation can bring to both individuals and society.

So what are the key challenges? And what can we do to address them?

1. *The activities that people do are becoming more diverse: how should we respond to this?*

- Focus provision and support on those activities where participation is increasing:
  - (i) 'social / family' pursuits: informal games and playgrounds
  - (ii) 'modern active' pursuits: mountain biking and road cycling
- Provide for people with dogs: changing our attitude from 'a problem to be managed' to 'an opportunity to encourage'
  - (i) provide information of 'dog friendly' places to visit
  - (ii) provide suitable facilities and 'dogs welcome' signage

2. *People's place preferences are changing: how should we respond to that?*

- The distance people travel for recreation is getting shorter, but the use of cars is increasing. To reduce the increasing carbon footprint of outdoor recreation, we need to provide more connecting routes so that people can walk or cycle to the places they want to visit, both nearby and further away.
- Woodlands / forests are now the most commonly visited places, they provide 'easy to use' recreation opportunities which require no prior knowledge or skills. To increase participation we should consider rolling out a similar approach to other areas:
  - (i) Signage: waymarked trails with information about length, relative difficulty, and duration of routes
  - (ii) Provision for a diversity of activities (especially for dog walkers, families, and cyclists)
  - (iii) Provision of at least a minimum level of facilities and infrastructure
  - (iv) No physical barriers, such as stiles.

Section 8: continued

Key challenges and recommendations

3. *How can we increase overall participation, maximise the health benefits of outdoor recreation, and reduce inequality?*

- Make 'outdoor recreation' more competitive with other leisure time choices by:
  - (i) increasing our understanding of 'opportunity barriers' such as 'lack of time'
  - (ii) making activities 'easier to do' by reducing the skills and knowledge required to participate; providing more opportunities close to home; and responding to people's activity preferences.
- Focus on increasing **frequency**: consider interventions which address the activity preferences, motivations and barriers of those in the 'Infrequent' Segments 3 and 5 in the Amber Zone
- Focus on increasing **intensity**: interventions which address the activity preferences, barriers, and motivations of those in the 'Low Intensity' Segments 3 and 4 in the Amber Zone
- Provide interventions based on **lifestage groups** such as 'mothers with children', 'young, busy professionals', 'early retired'; rather than areas of deprivation. The evidence has shown that who you are has a greater impact on participation than where you live.
- Undertake research on how and why people 'transition' between groups as they move through different lifestages, both increasing and decreasing participation. Use this as the evidence base for improved behaviour change interventions.

Natural Resources Wales will be considering how best to respond to these key challenges and recommendations. But the outdoor recreation sector involves a broad range of organisations:

we will only be effective if we all use the evidence to inform our future activities.

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