

Understanding future demand for outdoor recreation

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Introduction

Is it possible to understand future demand for outdoor recreation? This knowledge would be extremely useful as recreation managers not only have to respond to current participation and issues, but also have to plan and develop the infrastructure and opportunities for the future. Understanding future demand would ensure that future provision is better able to meet people's needs.

Methodology

This research utilised an extensive dataset on participation in outdoor recreation from a longitudinal national survey which was undertaken over two 12 month periods – 2008-2009 and 2011-2012 (Welsh Outdoor Recreation Survey 2008 and 2011). Each 12 month survey resulted in a sample of over 6000 respondents, and provided a comprehensive evidence base on outdoor recreation covering the following topics:

- overall participation in outdoor recreation
- types of activities and places visited
- barriers and motivations
- stated preferences for future demand

Results

In order to understand potential future demand for outdoor recreation in Wales, this research analysed the results of these surveys based on two approaches:

- (a) a 'backward' look using trend data which identified changes in recreation behaviour over a period of 3 years
- (b) a 'predictive' look using stated preferences which asked people to say what they would like to do in the future

An overall assessment of future demand was gained by comparing the results of both the above approaches and identifying commonalities. This work was supplemented by considering the results in light of wider demographic trends in the general population.

Changes in Recreation Behaviour

Firstly, the research considered what past changes there had been to participation, with the assumption that if those changes continued in the same direction that they would be indicative of future recreation. Key changes were found in the evolving pattern of recreation behaviour:

- People had become more 'multi-activity', undertaking more than one activity rather than just a single approach. Consequently, there had been an increase in participation in wider range of activities.
- In particular there had been an increase in wildlife watching, visiting outdoor playgrounds, and cycling.
- Related to the increase in cycling, the analysis also found that there had been an increase in the overall level of physical activity amongst the population, resulting in improved health benefits.
- The places that people visited had changed with an increase in visits to woodlands and beaches.
- People had also changed to visit places, which were closer to home, and for their outdoor recreation trips to be of a shorter duration.

Stated Preferences for Future Recreation

The surveys in 2008 and 2011 asked people whether they would like to take part in outdoor recreation more in the future, and if they did, what activities they would like to do more of and which places would they prefer to visit more frequently. In order to help understand why those preferences might not be realised, the surveys also asked what barriers people faced in relation to future participation. The key findings of the analysis showed:

- Over half (60%) of the adult population in Wales would like to take part in outdoor recreation more often
- In particular, demand was higher than average amongst those who were currently infrequent participants, unemployed people, those in the oldest age groups (over 75's)
- In both 2008 and 2011, the greatest demand was to take part in more walking, mountain biking, sightseeing, and road cycling.
- However, between 2008 and 2011, the relative demand for more walking and sightseeing declined.
- People expressed demand for a number of 'aspirational' places more often, in particular beaches, mountains, woodlands, and the coast.
- As with current participation, the main stated barrier to future demand was related to 'lack of time' and 'bad weather', along with health and disability concerns.

Overall Assessment of Future Demand for Outdoor Recreation

In considering the analysis of past changes to patterns of outdoor recreation behaviour together with a review of the results of people's stated preferences, there are a number of commonalities, which provide a strong indication of the future direction of participation.

It is clear that respondents are becoming more 'multi-activity', and expressed demand indicates that people will continue to participate in a wider range of activities in the future. Growth in demand seems to be focused on three main types of recreation: the active pursuits of mountain biking and cycling, social experiences such as family-based activities, and the more passive pursuit of wildlife watching. More traditional activities are consequently static or declining.

There is an increase in demand for more 'convenient' recreation opportunities, with people preferring to visit places, which are close to home with trips having an overall shorter duration. Future provision of outdoor recreation should therefore consider developing opportunities that provide for participation in more 'bite-sized' chunks.

The research found that there appeared to be a contrast between the types of places people currently visited, which tended to be more accessible local parks and woods, with the types of places they stated they would like to visit more in the future, focusing on beaches and mountains. Consideration needs to be given to balancing these two different preferences in the future, providing for both convenient doorstep opportunities and aspiration trips to more iconic landscapes.

Finally, the research has indicated that although overall levels of participation have remained static, the socio-demographic profile has changed slightly. Changes between 2008 and 2011 have shown that there has been a slight increase in the participation levels of older people, those with a disability, and unemployed people. It is likely that this is associated with interventions from the public and voluntary sector, which have specifically targeted increasing the participation amongst these groups. With wider demographic trends indicating an aging population, it is probable that we will continue to see a growth in the participation in outdoor recreation by these socio-demographic groups.

References

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