Paper 6:
Impact of outdoor recreation

A report for Natural England's
outdoor recreation strategy

Contents

Executive summary

The purpose of this paper is to identify overall the major factors which will affect the provision and use of outdoor recreation in the next 15 years, and thus the major uncertainties and issues.

It is one of six papers commissioned by The Countryside Agency, from Henley Centre, to assess the future of demand for outdoor recreation to 2020. It should be read as setting the context for the specific papers 2 to 5 on Demand, Supply, Health, and Planning.

It has drawn on the overall project work on the future drivers of outdoor recreation. It uses a number of futures and systems tools to identify important themes and analyse their impact.

From this it identifies that outdoor recreation is largely to be found in a competitive set within the demand for leisure, and that the themes which will most significantly affect its provision and use in the next 20 years are affluence, health, and response to climate change. It is also necessary for Outdoor Recreation to respond to demographic change.

The four main areas which Natural England can influence to make the outdoor recreation agenda more visible cluster into two areas of public policy and two of user behaviour:

- Transport and travel
- Health and social inclusion
- Leisure activity
- 'Recovery' activity (e.g. wellbeing)

Critical issues which are identified if such visibility is to be achieved include:

- Lack of visibility and share of mind of 'outdoor recreation' as a proposition, to end-users or to policy makers
- Evidence exists for the benefits of outdoor recreation but does not appear to be clearly collated or well communicated
- The need to work effectively with other organisations with related agendas
- The need to connect outdoor recreation to the way in which end-users think about leisure and make choices about leisure use
- A need to understand the implications of social inclusion for outdoor recreation.

1 Background

Natural England is the new organisation which will result from the merger of English Nature, the Rural Development Service, and the Landscape, Access and Recreation divisions of the Countryside Agency. The Henley Centre has been commissioned to inform the development of a strategy for outdoor recreation, focusing on the question:

"What are the main factors which will inform the development of outdoor recreation in England over the next 20 years and what are the implications of these for Natural England's outdoor recreation strategy between now and 2015?"

To answer this question, six papers have been written, on each of the following dimensions of the future of outdoor recreation:

- Background and introduction to research
- Demand for outdoor recreation
- Health and outdoor recreation
- Supply of places for outdoor recreation
- Planning for outdoor recreation
- Impact of outdoor recreation

This paper is the last of these. Its objective is to review, overall, the drivers of change of outdoor recreation, and through this to identify both the critical high level issues and areas where issues identified in the other papers may connect to each other. One benefit of this approach should be that, by making the overall context clearer, that strategy can be developed with less risk of unintended consequences. It should also serve to validate the issues identified in each of the other papers.

The other papers and relevant appendices, which accompany the series, are referenced as appropriate throughout this report.

1.1 A definition of outdoor recreation

Outdoor recreation includes many different activities. As a result, a concise definition is difficult to establish. For the purposes of the papers, however, outdoor recreation can be broadly defined to include;

- Just being out doors
- Creative activities
- Health or relaxation
- Utility journeys
- Informal games and play

- High adrenalin, non-competitive activities
- Commercially run activities
- Study of the natural environment
- Educational activities and programmes
- Conservation volunteering
- Sustainable journeys to outdoor recreation

For a more detailed description of outdoor recreation please refer to 'Paper 1: Background and introduction to research'.

1.2 Context for paper

To create an overview of papers 2 to 5 it is necessary to understand the relationships between them. Some notes on process at this stage may therefore have value. The analysis underpinning this paper is based on a range of futures techniques, which are described below. The first stage of this analysis used a futures technique known as 'futures mapping'; relevant drivers of change within a system, positive and negative, are identified, and causal relationships established. ("What causes what to happen?") The initial set of drivers was taken as the set which emerged from the overall project process as being significant for any of Demand, Health, Supply, and Planning. During the review process, gaps were sometimes identified in the causal connections and relevant drivers inserted. This analysis is detailed, and is therefore included as an Annex to this paper for those who wish to review it for themselves.

For the purposes of this overview, it is clear that demand and supply are the most significant factors, and have their own relationship with each other: demand will respond to supply, and supply to demand. The other two strands act as influencers of the relationship between demand and supply. Health issues – a strong cluster of drivers of change in outdoor recreation – stimulate both. While the planning system is not, in general, hugely influenced by issues pertaining to outdoor recreation, it does seek to encourage certain types of behaviour and discourage others. In particular, at present, it is influenced by the need to moderate car use, partly to help ensure that the UK meets its Kyoto targets for reducing carbon emissions.

Figure: Integrating the four strands of outdoor recreation
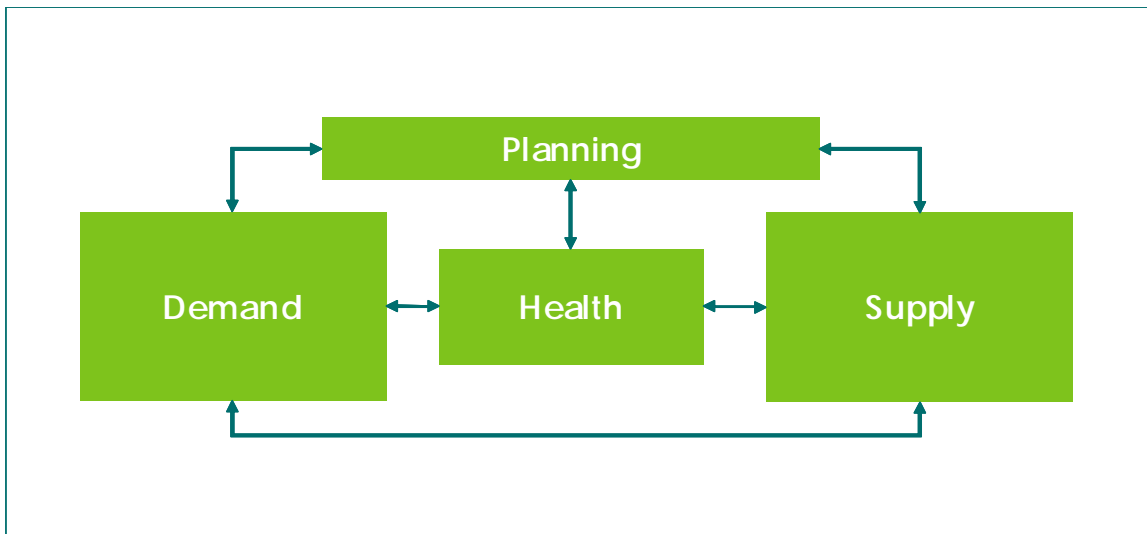
Source: Henley Centre Headlight Vision

1.2.1 Demand

In summary, the demand for outdoor recreation is bound up with overall demand for leisure, and for particular types of leisure. For this reason, it is related to the availability of an individual's time, their energy, and their ability to access appropriate locations. It is also bound up with their desire; for some, outdoor recreation is an integral part of their routine and their identity. For some it is an unintended consequence of another significant activity (dog owners, for example, think of themselves as 'taking the dog for a walk', not pursuing 'outdoor recreation'). For others, it is a pursuit, even across its many forms, which holds few attractions. The detail of this is to be found in the Demand paper. But one of the significant aspects of the demand for outdoor recreation is that it is competing, in the minds of users and potential users, for money, time and energy spent outside of the home or of work.

1.2.2 Health

Health bridges both supply and demand. It is increasingly critical; our analysis suggests that health is one of the two issues which creates greatest uncertainty in the areas of both demand and supply of outdoor recreation. (The other is the balance between car use and willingness to travel on the one hand, and increasing environmental concern on the other). The specifics are explored in the Health paper, but the long term impact of declining average levels of physical fitness, with the consequent health risks (such as obesity) have prompted both individuals and governments to respond. The government's physical activity agenda has followed the publication of the related analysis of community sports participation in the Cabinet Office report Game Plan.[i] However, this is not an area in which policy is trying to lead a reluctant population; the general social trend towards well-being is one of the most powerful in the UK at present. The decline in mental health levels – so far not

sufficiently visible to have provoked a public policy response – may not be far behind.[ii]

1.2.3 Supply

The definition of supply of places for outdoor recreation is as wide ranging as that for demand, because of the breadth of activities included in the adopted definition of outdoor recreation. Almost every outdoor space can be considered a potential 'place' for outdoor recreation. Some supply of outdoor recreation is planned and intended; parks, paths, and cycleways are examples of this. But as with demand, some supply is also to be found at the edge of other provision. Areas designed for organised sport blur into recreation; recreation takes place on open spaces which are not managed with recreation in mind.

Further, a review of the supply of outdoor recreation capacity needs to take into account both the stock of land, and the quality of provision of ancillary and supporting services, from toilet facilities, to access and parking provision, to information. In an increasingly affluent world, with a corresponding boom in consumption of services, especially leisure services, many judge provision of facilities against the more exacting standards of the commercial leisure sector.

1.2.4 Planning

If the health agenda is to be a lever for outdoor recreation, the outcome of the planning regime may be more mixed. Current UK planning policy is caught between two conflicting strands; the desire to meet carbon emission targets, and therefore to reduce road transport (as seen in the 'urban renaissance' policies pursued by most of the RDAs); and on the other hand the desire to maintain the role of London and environs as a 'world city', as seen in the development of the Sustainable Communities Plan and its attendant house-building programmes, at least in the southern half of England. These are both powerful policy drivers; any recreation strategy will be able to influence them only at the edges.

The questions raised by the drivers of planning, therefore, in terms of outdoor recreation, are about how to make issues relating to outdoor recreation better heard, and better understood as supporting other policy objectives, within the planning system. There is also a need to engage more fully, especially at a regional level, to ensure that recreation issues are seen as being part of the spatial strategies which each RDA is obliged to develop and deliver.

1.3 Approach

The discussion which follows has been built upon an analysis of the full range of drivers of change which were identified through the project process, and assessed during the series of workshops. A full list of explored drivers can be

found in 'Appendix B: Potential drivers of change in outdoor recreation to 2020.'

The methodology and structure adopted within this report is, therefore, different to that of papers 2 to 5. Here, we have used a number of futures techniques to assess the cross cutting themes from papers 2 to 5, and how they are connected with each other. These have included drivers mapping, analysis of dominance and dependency, and cross impact analysis. To support this process, we have also utilised the 'Decision Explorer' software package, which is designed as an aid to understanding relationships within models of change. For more detail on the process and output of the futures analysis please refer to 'Annex A: Mapping the impact of outdoor recreation.'

The paper proceeds as follows:

- The next section looks at the significant themes which emerge from the drivers, and the specific drivers within each theme. There are seven themes: demographics; affluence; health; climate change; consumer use of technology; regional growth; and public trust. This section prioritises these and maps the relationships between the themes;

- The paper then looks in more detail at one issue which has emerged as significant from the review of the themes. This is the relationship between outdoor recreation and overall consumption and provision of leisure.

- The final section uses a Henley Centre futures technique known as an impact matrix to help identify those drivers of change which are likely to be susceptible to influence by an effective outdoor recreation strategy, and which therefore give Natural England scope for intervention. Some of the discussion of this is a little technical: the conclusions, however, are not.

2 The significant themes

2.1 Introduction

The impact analysis work identified seven underlying themes which sit at the heart of the overall 'system' of outdoor recreation in England. Some of these themes, however, have more impact than others. These 'themes' are based upon the prioritised drivers identified across papers 2 to 5 listed above and from further insight gathered through the workshop process. They have been formed by clustering the drivers and insight into common groups and then exploring them within a wider context. i.e. within an environment broader than the remit of the four papers. The purpose in broadening the context in this way is to test and therefore to validate the findings of the other papers.

The seven underlying themes are outlined below. The content here is a summary of the more detailed futures mapping process which is documented in a separate Annex A: 'Mapping the impact of outdoor recreation'.

- **Changing demographics**
- The main trends captured under changing demographics are around changes in age, ethnic composition, and consequent changes in household structure. Fragmentation of household structure caused by higher divorce rates, and by the growth of single person households, is also a significant factor in the decrease in the number and proportion of traditional households.

- **Increasing affluence and changing expectations of leisure**
- This theme looks at the relationship of increasing affluence to leisure spend. As individuals become more affluent, the proportion of income spent on services compared to goods increases, and the proportion spent on leisure rather than on utilities also increases. This has the capacity to reinforce other important drivers of outdoor recreation such as demand for experiences ('the experience economy'). It also supports the scope for diversification of land use and, therefore, the potential for more places for recreation.
- In addition to changing patterns of leisure demand, greater affluence may also correspond to a sense among individuals and within households of a shortage of time and energy. This can lead to a desire for well being and potentially therefore for more recreation
- Increasing affluence also relates to transport, the willingness to travel, and therefore to demand for personal transport, which may be important in terms of access to outdoor recreation and will affect preferences for types of outdoor recreation.

- **Greater awareness of environmental concerns**
- Global warming is at the heart of this theme, though it does not of itself directly influence outdoor recreation. It is too abstract for this. 'Greater awareness of environmental concerns' however has more of a direct impact. This leads to a number of other influences, including The rise of

lobby groups, to Reduced demand for personal transport, and to Increased tension around transport use.

- **Declining health outcomes**

- The core driver here is 'Decreasing health outcomes'. This links to three related health drivers: Declining mental health; Increasing public health costs; and Drive to greater physical activity. But is also linked directly to two trends which have a hint of the spiritual about them; the Increase in wellbeing, and 'Retuned to nature', which are also influenced by citizen/consumer trends in the environmental area. A number of the health trends are also linked (negatively) to the demand for personal transport.

- **Increased use of information and communication technologies**

- There has been a significant increase in the amount of computing power, and digital technology, within the average home. There is an expectation that anything worth knowing can be found online and also a strong trend towards the 'Urbanisation of culture', aided by the social connectivity engendered by the technologies and the reduced need to plan social events. In the short term this urbanisation of culture has reduced the awareness of environmental issues.

- The implications for outdoor recreation are two-fold: first, that information about social and leisure activities are increasingly researched online, and arrangements made on the move through mobile; and secondly, that leisure activity, especially for younger people, becomes more screen-based (and therefore increasingly an indoors activity). However, it is possible that this is a trend which will reverse over time if urbanisation becomes too strong.

- **Decline in public trust**

- This theme incorporates drivers such as 'rise of the empowered consumer', and of 'entitlement', as addressed in the supply paper.[iii] These factors emerged from the initial review of relevant drivers, and was also identified as relevant in the drivers workshops. However, analysis of the trends related to it shows that it is less significant overall than the other themes identified.

- The effects on outdoor recreation are two-fold. The first is that it reduces the ability of public agencies to make strategy unless they are able to take individuals and groups with them (people are more likely to trust the opinion of other people than of organisations) while at the same time this theme also leads to outcomes at the individual consumer level (with the rise of the empowered consumer), and at a public level (with the rise in rights). The latter has been seen in the enforcement of access to spaces for recreation, and is also a factor in the rise of the notion of 'entitlement' to public provision.

- **Unequal regional economic development**

- As a theme, disparities in regional growth links together a number of significant contextual issues. These in turn feed through into the likely impact of recreation.

- The effects of regional disparities in growth between south and north. Changing population densities lead on the one hand to the ODPM's

Sustainable Communities Plan and equally to guidelines which, at time of writing, release land for building dependent on land prices. At the same time planning policies are heavily influenced by an urban regeneration agenda, which leads to changes in the urban landscape, the strong trends away from zoning and towards mixed use, and changes in land use. Consequences include the preference for brownfield development over new sites, and the integration of open spaces in urban development, which are discussed in the Supply paper.

The origins of the seven themes

Because the Impact paper was designed as a validation of the other papers, all of the drivers which had emerged as significant across Demand, Supply, Planning and Health were included in the review process.

These were then used to construct an overall map of 'driver relationships' for outdoor recreation as a whole. This was a map of 'causal relationships' in which we assessed which drivers led to others. (For example, 'increasing affluence' leads to 'increasing spend on leisure'.) Some drivers led to more than one driver. Some gaps were identified while the causal relationships were being identified, and where this was the case we 'completed the narrative' by inserting an additional driver. (For example, the causal connection from 'increasing affluence' to 'diversification of land use' runs through a driver which is 'changing patterns of demand'. A small number were identified as being very specific to a particular paper, and excluded for this reason.

The outcome of this process was that seven high level trends emerged as 'primary drivers' which therefore shaped overall outcomes. These were:

➢ Changing demographics

➢ Increasingly affluent society

➢ Global warming

➢ Declining health outcomes

➢ Falling cost of information and communications technologies

➢ Unequal regional growth

➢ Decline in public trust

They influenced other drivers on the map, but weren't influenced by them. The seven themes were the clusters of trends which flowed connected to these seven drivers.

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2.1.1 In summary

Reviewing these seven themes together tells the following story, captured in the diagram below.

Figure: Schematic of relationship between seven themes
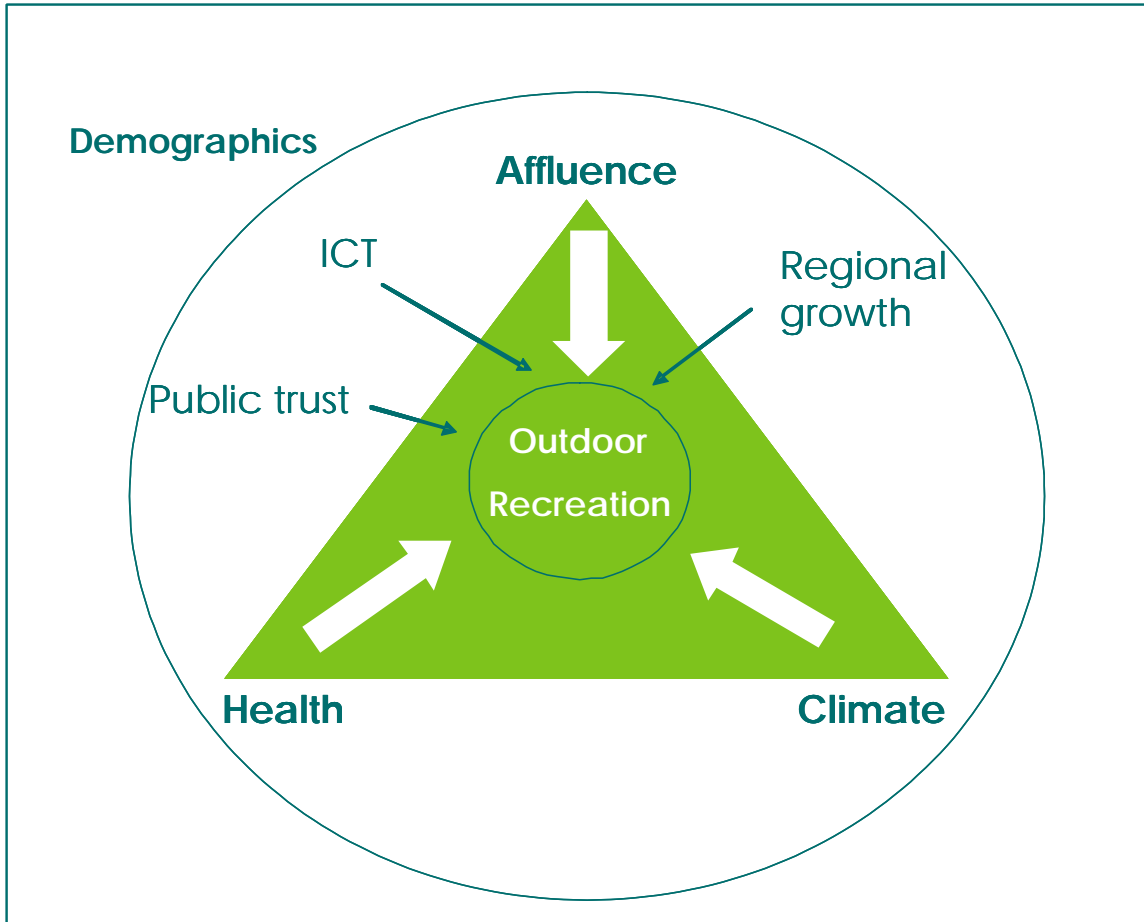
Source: Henley Centre Headlight Vision

The relationship between the themes is as follows: the demographics issues set a context in which the other issues are played out. It is little influenced by the other themes.

The major themes which will influence outdoor recreation across papers 2 to 5 are increasing affluence, declining health, and awareness of climate change. The mapping analysis suggests (and the schematic captures this in the simplest of forms) that demand, supply, and planning, as well as public policy about health, all find themselves influenced strongly by the interplay between these three strong drivers. It is also worth noting that generally, health and climate change awareness push in the same direction, acting as a curb on the drivers related to affluence. This represents a marked change, for this would not have been the case a decade ago, when affluence would have been dominant.

It is also worth repeating, as stating above, that this is not a matter of 'consumers' wishing to enjoy the fruits of affluence while being repelled by public policy. Some of the strongest drivers influencing individual behaviour, such as wellbeing, for example, are linked to health. Indeed, the sense that individuals think of themselves both as consumers and citizens, acting in both a private and public sphere, is perhaps stronger now than it has been for thirty years. In terms of outdoor recreation, this is a positive development.

The other three themes, as stated earlier, have an influence, but a less strong one. The impact of ICT (information and communications technology) in the home is partly about decision-making processes about social and leisure activity, but has a cultural effect in making the indoors a more attractive place for recreation, especially for younger people. The issue of public trust may reduce the scope for a public agency to act, while increasing demand for individual rights (as seen in the arts sector in the movement towards 'cultural entitlement'). On the other side of the picture, Regional Growth plays out in the shape of Regional Economic Strategies and Regional Spatial Strategies which attempt to reconcile environmental policy with economic ambitions. The danger here is that outdoor recreation – although well aligned with many of the regional objectives about sustainability and quality of life – may simply get lost in the noise of the larger picture.

2.1.2 A note on leisure

One of the features revealed by the drivers map was the way in which the driver about 'Increasing expenditure on leisure', which initially appears to be only a consequence of increasing affluence, proves to be connected with important drivers of health and climate change. Indeed, it is centrally connected to many of the significant drivers of outdoor recreation. (Details of the relevant part of the mapping process are in the Annex). This suggests in turn that, at least in the minds of individuals and households, decisions about outdoor recreation are intimately connected with decisions about leisure; and that in turn decisions about supply are similarly connected. The implication is that to develop an effective outdoor recreation strategy it is necessary to understand the changing context of leisure decisions and leisure use.

Leisure has been one of the great growth areas of Western economies, the UK included, over the past thirty years, in terms of consumer spend, available time, and also expectations of delivery and quality of service. For most of that time, the story has been a consumer story; of individual choice and individual value.

However, our analysis suggests that expectations of leisure are changing. It is not just about affluence any more. Instead, it sits between affluence, health, and climate change. Wellbeing is already a significant part of the leisure market (in the tourism sector one thinks of the rise of the spa hotel, for example) and there are now emerging indications that climate change and environmental issues are also becoming part of the equation as well. Henley Centre Headlight Vision has written elsewhere about whether there is a change in the 'centre of gravity', as to whether people see themselves primarily as

consumers or citizens.[iv] The answer is that the centre of gravity shifts, but in some issues (most markedly on obesity and food) the emphasis has shifted in recent years towards the citizen's perspective and away from the consumers. Many of the emerging issues suggest that something similar is beginning to happen around climate change.

In particular, leisure is linked not just to well-being but also to people's Time and energy deficits, and also to Retuned to Nature, as well as Greater awareness of environmental concerns. The implications of this for outdoor recreation are that it is important not to think of consumer expectations of leisure just as being about quality of facilities and levels of service standards. Many of the things which people seem to be looking for in connection with their leisure experience are peace, quiet, and recovery. Obviously outdoor recreation has a significant potential to fulfil these needs. The potential danger is that in looking too much at the leisure trends informed by affluence, one could lose sight of those driven by a desire to compensate for affluence. Any strategy needs to balance these competing influences.

3 Identifying the greatest points of impact

3.1 Introduction

The significant themes, and the relationships between them, offer valuable pointers as to the potential shape of the future of outdoor recreation, and its uncertainties. To get a more specific picture, however, it is necessary to analyse which of the particular drivers of change are likely to be most significant, and also to understand which are open to some degree of influence by Natural England.

3.2 Approach

To achieve this greater degree of understanding we used a slightly technical futures tool known as an 'impact matrix', which helps understand which drivers have most impact on the others in the set, and which play themselves out because they are influenced by other drivers. The way to read the Impact matrix in the context of the Outdoor Recreation project is explained with some examples below.

The purpose of an impact matrix is to help identify which of four categories a driver of change is likely to fall into:

- A causal, or 'context-setting' driver, which will change regardless of any actions taken by participants within the system which is under review (in this case the system which will influence the future impact of outdoor recreation). Such drivers are 'important' because they influence the behaviour of many of the other drivers in the overall system. But they have a low 'influence' score because few of the other drivers influence their behaviour. To take an example from the Outdoor Recreation matrix below, the driver 'Increasingly Affluent Society' is important but of low ability to influence. It has an impact on many of the other drivers in the system, but is little influenced by them.

- Drivers which are both important and uncertain, and whose behaviour is highly likely therefore to be influenced by actions taken by agents within the overall system (for example, Natural England, ODPM, local authorities, health authorities, Department for Transport, and so on.) Such drivers are both 'important' and significantly open to 'influence'. In other words, they influence a significant number of the other drivers within the overall system, but they are also influenced by many of the other drivers. They are likely to be part of systems with multiple causal relations, and also, sometimes, feedback loops. This makes them relatively unstable (and hence more likely to be uncertain in their potential outcomes). They are open to influence precisely because of this instability. In the Outdoor Recreation matrix, 'Increased Willingness to Travel' is an example of such a driver. It has been a sustained trend over time, but a number of the other drivers could

influence it so that it changes direction (for example, Increasing awareness of climate change; Declining health outcomes).

- Drivers which are highly open to 'influence', and therefore an outcome of the important/uncertain drivers, and whose behaviour might be a measure of the way in which the overall system is changing, or a consequence which has to be managed. Such drivers are influenced by a significant number of the other drivers, but influence few of them. Examination usually reveals that this is because they'Important/Uncertain' quadrants. An example in the outdoor recreation matrix is the driver 'Changing lifestyles of children and young people'. Analysis shows this to be influenced by Urbanisation of culture, Increase in household ICT, and Networked Society, among others. Such drivers are sometimes policy consequences, which need to be managed. Sometimes they indicate useful metrics to be monitored.

- Drivers which although they are part of the overall system are not influential in terms of the overall behaviour of the whole system. In terms of strategy analysis, these can be discarded. They have little impact on overall outcomes, nor do they need to be understood in terms of the behaviour of the overall system. 'Global warming' is an example from the Outdoor recreation matrix, probably because as a driver of change in the system it is of itself too remote from the issue of outdoor recreation. The impact of this area in terms of changing behaviour within the system is captured elsewhere in the matrix as 'Increasing awareness of climate change'.

The diagram below shows these relationships in a schematic fashion. The impact matrix process is explained in more detail in Paper 1: Background and introduction to research.

Figure: understanding the impact matrix output
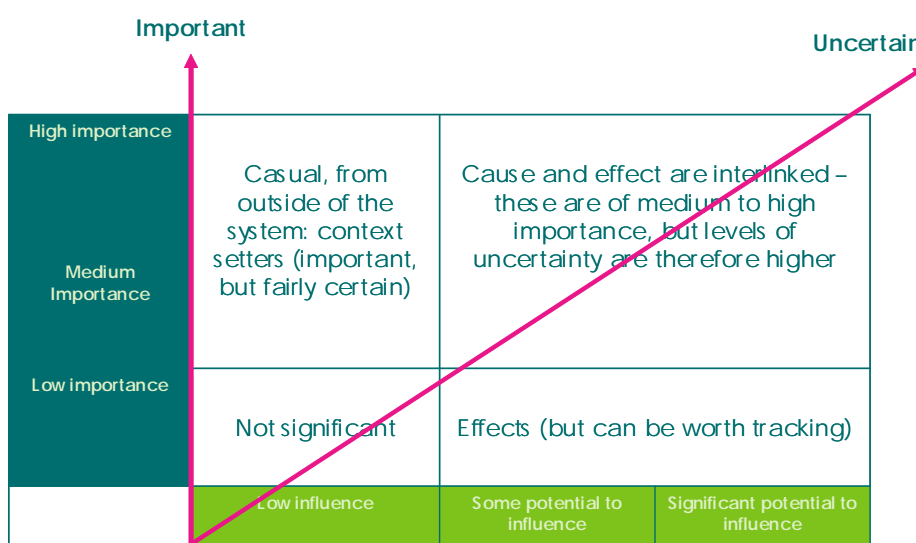
Source: Henley Centre Headlight Vision

3.3 Developing the matrix

To develop the impact matrix for outdoor recreation, we identified the 30 drivers of change from the full drivers map which had scored well in workshops, and added those which the Decision Explorer mapping software identified as being reasonably well connected within the overall system.

These were then tested using the impact matrix technique. Effectively, each driver of change is assessed against every other and a judgement made as to the size of the effect each driver has on all of the others. The results are shown in the diagram on the following page.

3.4 Impact matrix for outdoor recreation

What the Impact Matrix shows is that the 'contextual' drivers, which can't be influenced by policy intervention to do with recreation, are around economic performance (increasingly affluent society, unequal regional growth, and related behaviour such as 'empowered consumers'), and demographics (ageing society, decrease in traditional households).

The 'effects' include three drivers around land use (Trends towards mixed use, Diversification of land use, and Conflicts about different types of recreation) and also the Changing lifestyle of children and young people. (This is because these are each being influenced by a number of the important and uncertain drivers). As stated above, Changing lifestyle of children and young people is being "driven" by drivers around the Networked Society, the Urbanisation of culture, and Increase in household ICT. 'Trends towards mixed use' is being influenced by Tensions in transport infrastructure, Social inclusion, and Declining health outcomes, among others. Conflicts between different types of recreation, and Diversification of land use, are influenced by, for example, Increasingly affluent society, Rise of the experience economy, Retuned to nature, Desire for wellbeing, among others.

Those drivers which did not have a significant effect on the overall system of future outdoor recreation included global warming (probably because, as suggested above, it is too distant from actual behaviour, which is captured in the highly significant driver, 'increasing awareness of environmental concerns'); two broad social trends ('communal yearning and 'rise of public spirit') and the two 'political' drivers about the 'rise of single issue politics' and 'influence of lobby groups'.

Figure: The impact matrix for outdoor recreation

High importance	Increasingly affluent society	Urbanisation of culture Increase in household ICT	Increased willingness to travel Increasing awareness of environmental concern Demand for personal transport Desire for wellbeing Declining health outcomes
Medium Importance	Decrease in traditional households Ageing population Unequal regional growth Rise of empowered consumer	Increasing spend on leisure Networked society Increasing income disparities	Drive to greater physical activity and health Tensions in transport infrastructure Social inclusion Retuned to nature Rise of experience economy
Low importance	Global warming Communal yearning Rise of single issue politics Rise in public spirit Influence of lobby groups	Trends towards mixed use Diversification of land use Conflicts between different types of recreation	Changing lifestyles of children and young people
	Low influence	Some potential to influence	Significant potential to influence

Source: Henley Centre Headlight Vision

3.5 Important and uncertain drivers of outdoor recreation

However, the main value of the Impact Matrix approach is that it indicates those drivers which are potentially capable of being influenced through an effective strategy: those which are important and uncertain, and are captured within the matrix as being either High or medium importance, and Some ability to, or Significantly open to influence. They are located in the top four right hand boxes of the matrix.

The matrix identifies 16 such drivers in the area of outdoor recreation:

- Rise of experience economy

- Urbanisation of culture

- Increase in household ICT

- Networked society

- Increasing spend on leisure

- Increasing income disparities

- Drive to greater physical activity and health

- Greater awareness of environmental concerns

- Retuned to nature

- Increased desire for wellbeing

- Time and energy deficit

- Demand for personal transport

- Social inclusion

- Declining health outcomes

- Greater tensions in transport infrastructure

- Increased willingness to travel

To help frame thinking about strategy, these are more usefully clustered to make the emerging issues easier to identify. Having reviewed them, and tested potential clusters, we consider that they fall into four groups, two of which are primarily to do with public space, two of which are to do with individual or personal space.

Figure: Clusters of significant drivers
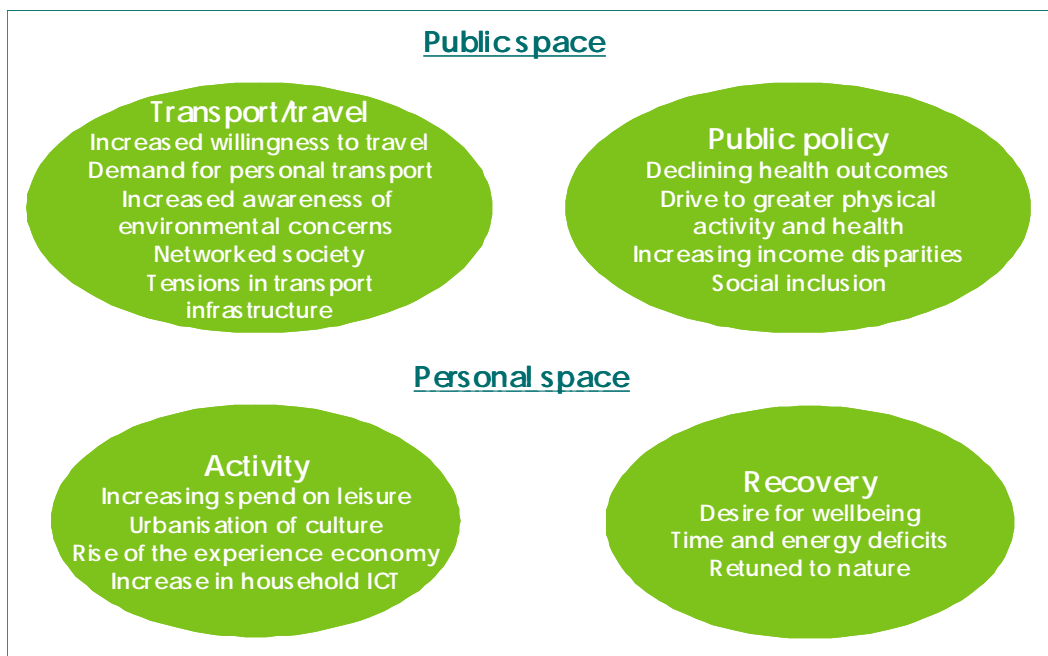
Source: Henley Centre Headlight Vision

The clusters help us to identify the spaces within which demand, supply, and public issues around outdoor recreation will play out. They also enable us to identify areas of uncertainty:

3.5.1 Public Space: Transport/travel

Current trends around the demand for personal transport show that car mileage is continuing to increase, and individuals continue to live at significant distances from their work, and are willing to travel significant distances for leisure. These trends have been encouraged by transport policy over the last twenty five years, and have been reinforced by changing employment

patterns (such as dual income households) and increasing importance of leisure.

However, it is likely that response to environmental trends will start to slow this over the next 15-20 years, both because of changing social perceptions and public intervention (such as road pricing). The increasing spread of rapid network connections is likely to change transport and work patterns to an extent over that time.

3.5.1.1 Uncertainties

The anticipated impacts of these trends on outdoor recreation are likely to be that:

- More outdoor recreation (and more leisure) will be closer to home – and therefore in an urban environment

- To the extent that networked society trends reduce the amount of travel to work time, time will be freed for other uses. This is an opportunity since available research suggests that when people work from home they still feel the need to go out during the day

- Those people who choose to drive long distances, for work, leisure, or recreation, are likely to be more affluent. They may come into conflict with other users, who either do not have the same access opportunities or who have chosen to use more environmentally friendly routes. Users may expect public agencies to intervene in line with their stated values to restrict access which is environmentally damaging, for example. It is worth noting that in a previous scenario testing exercise conducted by Henley Centre for a client in a related area, such conflict extended to direct action to prevent access to environmentally damaging vehicles. Natural England may need to take a view on how it balances its view of the competing expectations of recreation users.

3.5.2 Public space: Public policy

The health impacts caused by a less active society, especially around obesity, have been significant components of public policy since the Game Plan report (December 2002)[v] and the subsequent warning by the Chief Medical Officer of the likely public health consequences of obesity.[vi] The underlying trends which have led to us becoming a more overweight society (diets involving more takeaway and processed food, and less exercise) have not diminished. For these reasons the public drive for greater physical activity is likely to continue for the foreseeable future. We anticipate that there will also be increasing concern about mental health, both because of its social impact and because of the health costs of managing this through prescription.

However, both this agenda and the 'entitlement' agenda are driven in part by public policy concern over widening social disparities, both between regions and within them, and this has meant that the social inclusion agenda has been strong. This is only partly due to the presence of a Labour administration. The

devolution of regional economic management to Regional Development Agencies has increased the focus on the importance of social and economic participation to economic success, and therefore on the conditions for this. For these reasons it is likely that the social inclusion agenda would survive a change of administration.

3.5.2.1 Uncertainties

- The health and physical activity agenda obviously represents a massive opportunity for Natural England and its partners in the promotion of recreation to gain policy support in encouraging recreation. This should extend to include the psychological benefits as well. However, the impression is that the value of recreation has been 'drowned out' by the effective response of Sport England in developing the community participation agenda and by the Department of Health's physical activity agenda (even if both of these overlap with recreation). In effect, the public policy response appears to have already been framed by these two agencies as being about some combination of increased activity and sport, with recreation squeezed to the margins.

- Because mental health issues are still emerging, they are relatively unformed as a public policy position. Unlike response to physical health issues, where activity is regarded as positive and there is social exchange about it, there is still stigma attached to mental health. There are also powerful commercial interests invested in maintaining the current prescription based approach. If recreation is to be positioned as a source of improved psychological well-being, information and campaigning may be required.

- The social inclusion agenda around sports and culture is well-developed and fairly well-articulated. (The culture agenda was stated by the Secretary of State for Culture, Media and Sport, Tessa Jowell, in a personal essay last year).[vii] The social agenda around outdoor recreation seems in contrast to be largely undefined.

3.5.3 Personal space: Activity

The clusters of drivers in 'personal space' have been grouped by first, those drivers which are closer to conventional expectations of leisure as a set of activities which is, to a significant extent, mediated by the market, and second, those which are about 'recuperation' or 're-balancing', and which may or may not be mediated by the market.

The set of drivers in the 'Activity' cluster represent a group which largely pull people away from outdoor recreation, other than as part of high profile structured activity. The trends towards ICT and the urbanisation of culture pull towards a screen-based, technologically mediated culture. However, within the Increasing spend on leisure and the Experience economy there are some emerging trends which may head in the opposite direction. To take one example, the burgeoning supply of, and demand for, outdoor concerts or music festivals are examples of 'Experience economy' activities which have clear links to outdoor recreation.

3.5.3.1 Uncertainties

- The critical uncertainty in this cluster is the strength of its relationship with a younger cohort of so-called 'digital natives', a younger generation which has grown up with digital technologies and is completely at home with them. It is not yet clear whether their behaviour patterns represent a 'cohort effect' (i.e., they'll continue behaving in the same way as they get older) or an 'age effect' (i.e., younger people have more time and fewer constraints).

- There's a second related set of technological uncertainties. The pattern of evolution of digital technology is migrating from fixed (internet enabled PC) to mobile (mobile phone, laptop). The migration towards mobility is continuing, and will be reinforced by the development of public wireless based distribution and increasingly powerful mobile phones with greater functionality. The uncertainty therefore is whether these more mobile technologies will encourage a more outdoor lifestyle which may connect better with recreation.

- The third uncertainty is whether the emergence of the personal trends captured in the 'Recovery' cluster cause a change in expectations about types of leisure and the nature of 'experience' in the experience economy.

3.5.4 Personal space: Recovery

This cluster, which includes 'Time and energy deficit', 'Increased desire for wellbeing', and 'Retuned to nature' is on the face of it a cluster which should create strong demand for outdoor recreation. The available evidence suggests that outdoor recreation can help with all of these, and indeed is an integral part of 'Retuned to nature'. However, this does not necessarily mean that they will increase significantly demand for outdoor recreation. The largest success in the 'energy deficit' market has been the drink Red Bull, which has made its proprietor a multi-millionaire. Outdoor recreation needs to compete in the minds of users with health and energy products as a possible alternative to help personal recovery.

3.5.4.1 Uncertainties

- The trends within this cluster appear sufficiently strong that they will continue over the next 15 years. In a world where further environmental degradation seems likely they may become stronger. What is not clear is how individuals will respond to them; in an affluent world they may prefer to buy products or services to fulfil a perceived need rather than change their underlying behaviour. A successful outdoors recreation strategy would create such a presence for the potential offered by outdoor recreation in the minds of users. It would help make people conscious of the health and personal benefits of the lunchtime walk in the public park or by the river, for example.

4 Critical issues

From the analysis within this paper, we identify eight critical issues.

4.1 From 'outdoor recreation' to 'outdoors'

The overwhelming issue appears to be lack of visibility and lack of presence in the minds of individuals of outdoor recreation as an activity. It is hampered partly by the very broadness of its definition. People who are walking by a river, or flying a kite, or having a picnic, or a 'pick up' game of football, do not regard themselves as engaging in outdoor recreation. It is also possible to argue that the notion of 'recreation' is a relatively old-fashioned idea which has little purchase with people in the 21st century. The creation of the new agency, with a broader remit, offers an opportunity to escape from existing conceptual frameworks (which have embedded within them notions of countryside leisure which reflect the remits of each of the previous agencies). It is about urban life as well as country life.

This lack of awareness creates obstacles to engagement both with users and with public policy makers. We believe you need to simplify the sense of what's being described: it seems to us that the underlying objective of any outdoor recreation strategy is simply to get people outside more; it's about being outdoors. The recreation will follow provided the opportunities are there.

4.2 Creating an identity for outdoor activity

As well as people, the other part of the agenda is about places. Obviously at one level, outdoor recreation can be done anywhere outside where there is access, as any jogger or cyclist will testify. But creating an identity for the activity needs a greater focus than the current list of activities which could be considered to constitute 'outdoor recreation'. Organisations with limited budgets for promotion and marketing need to tell simple and distinctive stories if they are to cut through the rest of the marketing noise out there and influence behaviour.[viii]

We suggest that your simple and distinctive stories should be about places: for example, parks, pathways, beaches, lakes, woodland. This enables you to develop clear partnerships with other relevant agencies, to create a clearer public narrative about recreation, and also links clearly and visibly both to your organisational objectives, as laid out in the Act, and also to your planned structure.

4.3 Outdoor recreation is about casual daily activity as much as planned trips

The next 20 years are very likely to be volatile in terms of transport policy; there will be social and political conflict as personal car use is, overall, reduced slowly by successive and incremental restrictions. This implies that more outdoor recreation will take place closer to home, and therefore in and around cities, and there is a clear need, in terms of the strategy, to emphasise the value of this relatively spontaneous local and social activity.

At the same time, much of the significant social exchange about outdoor recreation is about high profile activity which includes in it some measure of personal achievement, such as long walks or rides or big climbs, which typically involve car use for access. An outdoor recreation strategy needs to support and promote both ends of this spectrum.

4.4 You need to connect to the health agenda

The health agenda should offer a huge opportunity for outdoor recreation, but the connections need to be made, both with the Department of Health's physical activity agenda and the community sports participation approach. These connections are at two levels; conceptually, around how recreation connects to the wider policy objective, and organisationally, about how Natural England connects to other organisations. Sport England is an ally, not a competitor. As President Truman is reputed to have said, "Great things can be achieved if you don't mind who takes the credit".

There are also opportunities here for Natural England to raise its profile. Most of the current public health drive is around physical fitness, in response to the obesity crisis. However, there are emerging issues identified within government around declining mental health. Natural England can potentially link its outdoor recreation agenda to the evidence around the value of the outdoors, and of nature, to maintaining psychological wellbeing.

4.5 You need to get your evidence base in one place

The benefits of outdoor recreation are well established through research and pilot and other projects, but these appear to be a well-kept secret shared between enthusiasts and protagonists. The evidence needs to be pulled together, distilled, and communicated, both to the public and to policy makers.

4.6 You need to connect better to leisure

Leisure activity is increasingly urban. At the same time, we see the emergence of leisure trends which have close affinities with outdoor recreation: running a marathon is sport, but the training is outdoor recreation; going to a festival

A report for 'Natural England's' outdoor recreation strategy.   23

involves a lot of outdoors activity, even if it's not necessarily outdoor recreation. To gain an increased visibility in people's minds, outdoor recreation needs to build on those activities which people regard as leisure, travel, or experience, but which are related to outdoor recreation.

There are also benefits in making the wider connections: just as Transport for London has been advertising cycling as being about exercise, knowing your surroundings, saving money, and convenience, a picnic is about social connection as well as outdoor recreation.

4.7 If people are using technology to decide what they are going to do, you need to be there as well

One significance of household technology is the importance it has assumed in research for products and services, and subsequent decision making. Leisure and tourism decisions are increasingly researched online. If decisions about outdoor recreation are being made in the wider context of competing leisure activities, outdoor propositions need to be online as well; even if it's just ideas for things to do with children in the local park.

There are dangers here, of course; many public organisations have over-reached themselves with such endeavours. Internet advocates remind us that the strength of the internet is not in its content, but in the links between them. Much of the content is almost certainly out there already, but it needs to be connected together with an intelligent search facility. It is also worth noting that internet penetration has stalled at around two-thirds of UK adults; this is not a strategy for inclusion.

4.8 You need to have a view on social inclusion

What does social inclusion mean in the context of outdoor recreation? What are its implications? In a world where the government talks about helping people escape from the 'poverty of aspiration'[ix] it would seem both valuable and appropriate to have a view of what defines poverty in the area of access to and use of the outdoors.

The lessons from other sectors are that inclusion is not just about access but also about building social and cultural confidence. Less than two-thirds of the population go to museums, for example; a smaller proportion go into bookshops. The barriers are often about not knowing how one is expected to behave in an unfamiliar environment; sometimes they are associated with unhappy experiences while at school, or poor instruction. An inclusion agenda needs to address these issues as well as dealing with access. There are innovative projects out there already. They may just need a bit more visibility. It may be an essential part of the process of gaining the participation of future generations of young people.

If you do only one thing, do the first one. The rest should follow.

Appendix 1: Long list of drivers reviewed

- Dominance of urban lifestyles
- Changing population density
- Increasing ethnic diversity
- Ageing population
- Changing demographics
- Decrease in traditional households
- Changing lifestyles of children and young people
- Increased screen time
- Changing working patterns
- Declining mental health
- Rise in public spirit
- Rise of empowered consumer
- Rise of experience economy
- Entitlement
- Convenience culture
- Urbanisation of culture
- Increase in household ICT
- Networked society
- Increasingly affluent society
- Influence of large leisure providers
- Olympics 2012
- Investment in outdoor facilities
- Increasing public health costs
- Increasing spend on leisure
- Increasing income disparities
- Sustainable communities plan
- Increased conflict between different types of recreation
- Global warming
- Changing urban landscape
- Priorities in public policy
- Rise of single issue politics
- Decline in public trust
- Future of planning structure

- CAP Reform
- Diversification of land use
- Drive to greater physical activity and health
- Greater awareness of environmental concerns
- Risk averse society
- Retuned to nature
- Increased desire for wellbeing
- Time and energy deficit
- Communal yearning
- Demand for personal transport
- Social inclusion
- Influence of lobby groups
- Declining health outcomes
- Greater tensions in transport infrastructure
- Road safety
- Trends towards mixed use
- Changes in land use
- Fragmentation of leisure
- Increasing access
- Increased availability of information
- Increased willingness to travel
- Unequal regional growth
- Falling cost of ICT
- Rise in rights

[i] Game Plan: a strategy for delivering Government's sport and physical activity objectives, published by the Strategy Unit. www.number10.gov.uk/su/sport/repor/01/htm.

[ii] There is some degree of public policy awareness, however. See, for example, Richard Layard, "Mental health: Britain's biggest social problem?", December 2004, presented at a seminar hosted by the Cabinet Office Strategy Unit. www.strategy.gov.uk/seminars/mental_health/index.asp, accessed 19 September 2005.

[iii] Henley Centre HeadLightVision, Supply of places for outdoor recreation

[iv] Andrew Curry and Rachel Kelnar, "Shifting Centres of Gravity: from consumers to citizens", HenleyMail 45, 2005.

[v] Game Plan, *op cit.*

[vi] House of Commons Health Select Committee, Third Report: Obesity, 2004. www.publications.parliament.uk/pa/cm200304/cmselect/cmhealth/23/2302.htm.

[vii] Tessa Jowell, "Government and the Value of Culture", DCMS, May 2004.

[viii] Adam Morgan's book *Eating the Big Fish* is the classic marketing text on how to create visibility for an idea or a proposition on a limited budget.

[ix] Tessa Jowell, *op cit*