



HenleyCentreHeadlightVision

**Paper 4:
Supply of places for outdoor
recreation**

A report for Natural England's
outdoor recreation strategy



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Executive summary

In May 2005 the outdoor Recreation Strategy Project Board made up of representatives from the Countryside Agency, English Nature and the Rural Development Service jointly commissioned Henley Centre to assess the future of supply for outdoor recreation over the next 20 years. This report constitutes the fourth of six papers, it is preceded by the 'Background and introduction to research' paper, the 'Demand for outdoor recreation' and 'Health and outdoor recreation' papers and followed by the 'Planning for outdoor recreation' and 'Impact of outdoor recreation' reports (see Paper 1 for background, objectives and structure of reports).

As part of the process, Henley Centre identified the key drivers of change, i.e. influential factors shaping the future of outdoor recreation; the critical uncertainties surrounding outdoor recreation and the crucial questions facing the future of the supply of places for outdoor recreation.

The initial stages of the project process, which included exploration of the issues, executive interviews and workshops, identified a set of 38 possible influential drivers of change shaping the future of outdoor recreation (see Appendix B: Potential drivers of change in outdoor recreation to 2020). These drivers have been explored and filtered down to identify the most significant drivers of changing outdoor recreation within the context of demand, health, supply and planning. The following six drivers have been identified as the principal drivers of supply for outdoor recreation:

- Diversification and CAP reform
 - Stakeholders argued that diversification has the potential to increase the availability of space for outdoor recreation and the potential to help shape, land owner and, wider attitudes to tourism and recreation in rural areas.
 - The constraints surrounding the potential of diversification, however, have also been recognised. These limitations are referred to within this paper, but discussed further within the 'Planning for outdoor recreation' report.
- Changing urban landscapes
 - This includes the expansion of urban space and the changing nature of the urban environment through urban regeneration. Stakeholders felt that this issue was particularly significant for the provision of 'on the doorstep' recreational opportunities.
- Changing public spending priorities
 - The synergies between other public priorities, such as health and the environment, and outdoor recreation present significant opportunity for outdoor recreation and should be explored.
 - The impact of the changing nature of public spending priorities must also be taken into consideration, in order to safeguard the long term interests of outdoor recreation.

- Growing influence of large leisure providers
 - The increased commercialisation of the wider leisure industry could have important consequences for outdoor recreation. Some stakeholders raised concerns over the increasing dominance of such providers.
 - As commercial leisure providers continue to invest in facilities and activities in order to provide a competitive leisure experience, people's expectations of the outdoor experience will grow. The supply of places for outdoor recreation will have to meet these expectations if engagement in outdoor recreation is to grow.
- Increasing access
 - Here we look at increasing access in its broadest sense, taking into consideration Rights of way, as well as, improved access for certain groups in society such as lower income groups, people with disability, the elderly and ethnic minorities.
- Transport infrastructure and networks
 - We examine the impact of the changing transport infrastructure (number and state of roads, rail links etc.) on outdoor recreation before going onto look at the impact of the transport network (integration and frequency of bus and rail services etc.) on outdoor recreation.

Each driver of change has the potential to significantly influence the future of outdoor recreation whether through its influence on; the **quantity of supply**, and so scarcity of resources available for outdoor recreation; on the **quality of supply** which takes into account a number of different subjective factors; and/or on the ease of **access to places** for outdoor recreation.

The prioritised drivers outlined above result in a complex set of driver specific threats, opportunities and challenges impacting the different areas of outdoor recreation in a variety of ways. For this reason, it is important to take this analysis a step further and look at the relationship between the prioritised set of drivers and how their influences play against, or reinforce each other. The report, therefore, goes onto explore what happens when we look at the impact of the drivers in the context of one another and to ascertain which drivers are the most unpredictable.

The prioritised drivers were analysed using a mapping process (see paper 1), which identified the following two areas as the most uncertain aspects of outdoor recreation, in that they both influence and are influenced by the greatest number of other drivers:

- Entitlement
 - Our growing sense of **entitlement**, the public's interest in understanding and exercising their rights, can be illustrated through the introduction of The Human Rights Act and Freedom of Information. These are forms of legal and Government access. Similarly, rights of physical access to land and buildings are increasingly embedded in law.

- In the area of outdoor recreation, as we benefit from increasing economic prosperity and growing disposable incomes, and as our attention shifts away from material goods towards aids to wellbeing and the **experience economy**, our ability to access spaces for recreation could become increasingly important and our sense of entitlement to that space may grow.
- The extent to which **entitlement** will manifest itself within the outdoor recreation arena however is very uncertain and dependent on a number of other drivers. The extent to which outdoor recreation will become familiar and relevant to modern life is explored within the 'Demand for outdoor recreation paper.'
- Increased access and transport
 - **Increasing access**, in its broadest sense, is about increasing the supply of places and making it easier to use available places for outdoor recreation.
 - The overall ease of access to outdoor spaces is uncertain and dependent on a number of drivers. For instance, will developments in **transport infrastructure and networks** make it harder for users to travel to sites? Will improvements to the provision and design of facilities make outdoor recreation easier and more accessible for groups within society? Will the importance of urban regeneration grow and benefit 'on the doorstep' recreation initiatives?

It is significant that our sense of **entitlement** to outdoor spaces and **increasing access** to outdoor spaces have emerged as the two areas of greatest uncertainty facing the supply for outdoor recreation: Our sense of **entitlement** to outdoor space is analogous to our demand for outdoor space; whilst **increasing access**, in its broadest sense, is about increasing/enhancing the supply of places. The two areas of greatest uncertainty are, therefore, about the amount of demand for outdoor recreation the supply of places will have to cater for and the ease of doing so.

The paper takes the initial prioritised set of drivers together with the areas of uncertainty highlighted above, and goes onto identify the critical issues facing the outdoor recreation strategy in the context of the supply of places for recreation. The critical issues are as follows;

- Moving 'places' to people: Provision of 'on the doorstep' recreation
- Moving people to 'places': Sustainable transport
- The management of high quality natural environment and recreation
- A broader outdoor experience and management of conflict between users
- Quantity/scarcity of outdoor spaces: land is a finite resource

The questions and answers surrounding the above issues have the potential to significantly shape the future supply for outdoor recreation over the next 20 years and the formulation of an outdoor recreation strategy will need to take them into consideration.

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. Henley Centre has been commissioned to inform the development of a strategy for outdoor recreation, focusing on the key 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, each of which focuses on one 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, paper 4, addresses the following question:

“What are the key factors that will influence the supply of places for outdoor recreation over the next 20 years and what are the implications for Natural England’s long term outdoor recreation strategy?”

The other five papers and the appendices, which accompanies the series, are referenced 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'.

A review of the supply of places should not only take into account the stock of land, but also the quality or appeal of sites and the accessibility of the resource. Within this paper, therefore, factors influencing the following areas have been examined;

- The scarcity of resource
 - Land is a finite resource which can be put to many competing uses, outdoor recreation being just one. Consideration must be given to the competing uses of land and to other organisations supporting these alternative agendas. The supply of places for outdoor recreation will be heavily influenced by the growth and contraction in different types of land use. Uses such as residential, transport and utilities, industry and commerce, agriculture, minerals and landfill sites, community services, defence, and vacant land must all be taken into account.
- The quality of outdoor space
 - The quality of outdoor space can encompass many different features and varies between locations. Perceptions of quality will also differ between people as different factors will matter more to one person than they do to another. The quality of places for outdoor recreation can include many different features, such as the quality of the landscape, of facilities for recreation, of nature and conservation etc.
 - In terms of the natural environment, for example, rural areas are typically perceived to offer a higher standard of outdoor space compared to green spaces within urban centres. The reverse may be true, however, when thinking about the provision of basic facilities or accessibility. The *perception* of safety, whether rural or urban, is also a growing concern.
 - The quality of the outdoor environment is particularly significant for a sustainable outdoor recreation strategy. The importance of effective management, of both recreation and conservation, to preserve the quality of the outdoor experience is widely recognised.
- Access to outdoor space
 - Access to outdoor space encompasses 'Rights of Access' for the population as a whole, as well as for certain groups within society such as people with disability, ethnic groups, the elderly, and lower income groups. It also includes factors determining the 'ease' of access, such as access to relevant information, the adequacy of transport infrastructure, the proximity of outdoor space, or parking facilities for instances. For large

proportions of the population, such as urban dwellers, the better quality natural environment is hard to get to. Management of access is a key issue.

These three features of 'supply' for outdoor recreation are referred to throughout the report.

This paper begins by identifying and examining the key drivers of change (i.e. influential factors shaping the future of supply for outdoor recreation), and explores the threats and opportunities presented by each of the drivers. Following this, the paper goes on to explore the areas of greatest uncertainty facing the provision of 'places'. Finally, by combining the findings from the assessment of the key drivers and the areas of greatest uncertainty, the paper examines the 'critical issues' facing Natural England's outdoor recreation strategy, in the context of 'places' for outdoor recreation.

2. Drivers of change

2.1 Introduction

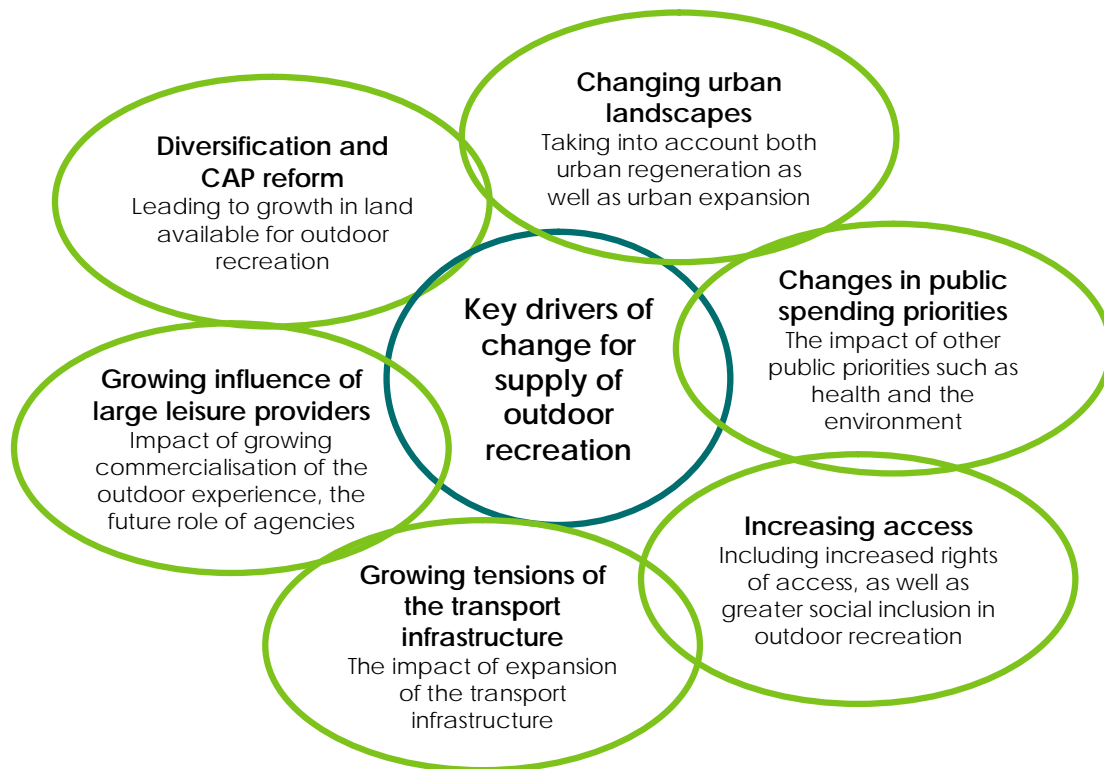
There are several factors that will influence the supply of places for outdoor recreation over the next ten to twenty years. These range from fundamental changes in land use, e.g. the growth in residential development, to legislative change such as the Countryside and Rights of Way (CROW) Act 2000 and reform of the Common Agricultural Policy (CAP), to the very design and management of resources, which will determine the character and quality of outdoor recreation.

The following section of the report explores a number of key drivers of change. In total, 38 different factors were initially considered (see 'Appendix B: Full list of the potential drivers of change in outdoor recreation to 2020'). The drivers have been examined through a series of in depth executive interviews, two workshops involving key stakeholders and experts, and analysed further in a workshop involving key staff of each organisation (See 'Paper 1: Background and introduction to research' for more detail on the overall project process and the methodology used to identify and prioritise drivers). The following drivers, or clusters of drivers, have been identified and prioritised as the most important factors determining the supply of outdoor recreation in England to 2025.

- Diversification and CAP reform
- Changing urban landscapes
- Public spending priorities
- Growing influence of large leisure providers
- Increasing access
- Transport infrastructure and networks

The following discussion takes each driver in turn and explores the implications of each one within the context of the supply of places for outdoor recreation. Some background information to each driver is given, before the discussion moves onto explore the threats, opportunities and key challenges of each factor. (The drivers are not presented in order of importance).

2.2 Drivers at a glance



2.3 Increased diversification of land use

Stakeholders argued that rural diversification has the potential to increase the availability of space for outdoor recreation and the potential to help shape wider attitudes to tourism and recreation in rural areas.

A number of initiatives are already in place to promote rural diversification. These include;

- Reform of CAP, which decouples subsidies from production. This will give farmers greater freedom to farm to the demands of the market. Environmentally friendly farming practices will be better acknowledged and rewardedⁱ, and movement into non agricultural based activities encouraged.
- The Rural Enterprise Scheme (RES) part of the England Rural Development Programme (ERDP), which provides assistance for projects that help to develop more sustainable, diversified and enterprising rural economies and communities. Its coverage is wide-ranging but the primary aim is to help farmers adapt to changing markets and develop new business opportunities.ⁱⁱ

- Agri-environment schemes which make payments or provide grants to farmers and other land managers. They aim to enhance and conserve English landscapes, their wildlife and history, and to help people to enjoy them. These programmes create new revenue for farmers and land managers and have the potential to preserve places for outdoor leisure and promote participation in outdoor recreation.

Given the nature of such activities, stakeholders regarded diversification as an overwhelmingly positive development. One that presented considerable opportunity for outdoor recreation. At the same time, however, when exploring the ‘planning’ implications of diversification participants were less certain of the potential to maximise the opportunities offered by greater diversification. (For a further discussion of the tensions over diversification and planning please refer to the ‘Planning for outdoor recreation’ paper accompanying this reportⁱⁱⁱ).

2.3.1 Exploring the effects on supply of places for outdoor recreation

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| <p>Opportunities</p> | <ul style="list-style-type: none"> • Diversification initiatives facilitate a shift from production to outdoor recreation and tourism. This could increase the supply of resource for recreation at a fundamental level and benefit provision for all kinds of activities. Diversification could create more natural open space for ‘just being outdoors’, for ‘creative activities’, or for ‘health and relaxation’ purposes. • As recreation becomes a viable alternative to production, the opportunities for more ‘high adrenalin, non-competitive activities’ and/or ‘commercially run activities’ may also increase. That is, the variety of activities on offer could expand. Variety of experience and the appeal of more extreme activities has been identified by some focus group respondents as an important quality of the outdoor experience. Diversification offers the opportunity to increase the kinds of places that cater to ‘high adrenalin, non-competitive activities,’ as well as other recreational activities. • Diversification of land coupled with incentives to promote and conserve the rural environment could help sustain the quality of land available for outdoor recreation by providing incentives to manage recreation and conservation. • Over time, land diversification may help change the attitudes of some rural communities towards recreation by highlighting the commercial opportunities it presents. This, in turn, may increase familiarity with rural tourism and reduce hostility towards it from land owning communities. The effect of this could be greater access to places for everyone and acceptance of a wider range of recreational activities within |
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| | the rural environment. |
| Threats | <ul style="list-style-type: none"> • Diversification brings about a fundamental change to the nature of rural industry and its communities. This will necessarily upset a pre-existing status. Resistance to change may prevent outdoor recreation from making the most of this opportunity. • The nature of diversification at this stage may limit the extent of influence diversification will have on land management and local activity. For a more detailed discussion on these limitations please refer to the 'Planning for outdoor recreation' paper^{iv}. |
| Additional challenges | <ul style="list-style-type: none"> • Suppliers of outdoor recreation need to be innovative to maximise the opportunities of diversification. Suppliers need to have a better understanding of consumer needs. This requires marketing and strategic support in the design of resources. • Stakeholders felt that 'Natural England' will need to have a clear, influential, local voice on the diversification issue coupled with a comprehensive strategic vision. • 'Natural England' could offer guidance to both the Government and rural enterprises on the outdoor recreation and diversification issue. • The practical limitations of diversification in terms of planning need to be recognised and overcome to maximise the opportunity diversification presents. |

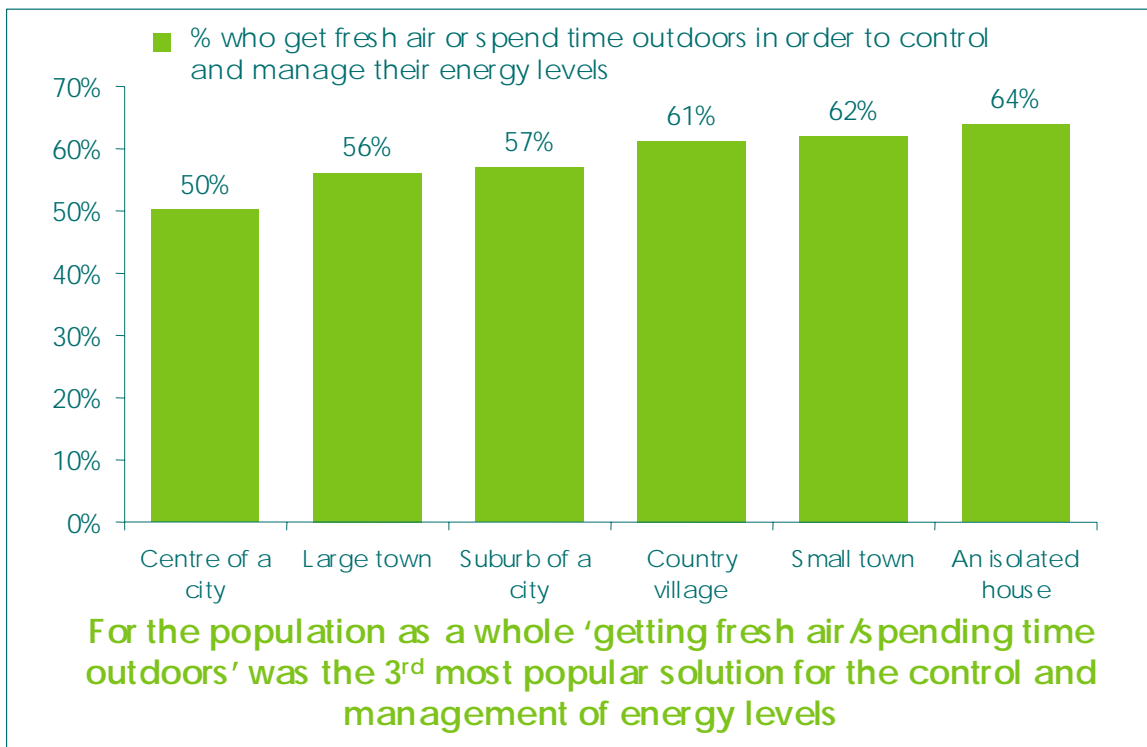
2.4 Changing urban landscapes

The expansion of urban space and the changing nature of the urban environment will have a significant impact on the quantity and types of places available for outdoor recreation in England. In this section we explore the impact of the changing nature of the urban environment, before moving onto the impact of expanding urban space.

It has been argued that urban green space can make an important contribution to regeneration and renewal projects^v. Green spaces within the urban environment account for 14% of Britain's urban areas. This figure includes traditional parks, quiet gardens, tree-lined city squares, cemeteries, woods and grasslands, vibrant play areas, allotments, and all green spaces around housing^{vi}.

2.4.1 Urban regeneration and green space

Urban populations are less able to access the benefits of outdoor space



Source: HenleyCentre, *Planning for Consumer Change (PCC) 2004*

Urban regeneration initiatives make a very important contribution to outdoor recreation in a number of ways;

- **Quantity/scarcity of resource**

- Urban regeneration, by improving the urban environment in general, will help to enhance the quality of nearby spaces for outdoor recreation. The introduction of parks, gardens, woods, grasslands, play areas, allotments and tree-lined streets and squares, will increase the quantity of space available for 'on the doorstep' recreation.

- **Quality of outdoor space**

- Urban green spaces will improve the quality of space for everyday activities such as 'just being outdoors' activities, and 'utility journeys.'
- Urban green spaces and parks help to enhance and support the ecology and biodiversity of the built up areas they are a part of. However, concern over the quality of the green spaces and parks themselves has been raised. The quality of urban green space is largely seen as low relative to the rural environment; the high population densities of towns and cities coupled with the popularity of open spaces can lead to over use and, therefore, detract from the outdoor experience^{vii}. Stakeholders also highlighted the importance of safety in and around urban green spaces. Focus group participants also cited the greater vulnerability they

felt in open spaces as a further barrier to participation in outdoor recreation.

"I will never forget walking home with my shopping and being robbed of my purse that was lying in the top of my bag."

Maureen 57, focus group respondent^{viii}

"It's not safe to go out these days."

Seniors, focus group respondent^{ix}

- **Access to outdoor space**

- The greater proximity of high quality outdoor space, created by urban regeneration to large proportions of the population, is highly significant. The spaces created through regeneration are far more accessible to urban people. It is especially relevant for those from lower income families without the means to travel to alternative areas. For urban dwellers, the introduction of urban green space will increase the access to space for 'informal games and play', for 'just being outdoors', or for 'creative activities'. It may also improve provision for 'education activities and programmes' for which proximity may be crucial.

2.4.2 Urban expansion

The urban landscape is expanding. From 1985 to 1994, a total of 285,000 hectares of land (about 2% of the area of England) was affected by change. Of this land, 68,000 hectares changed from rural to urban usage, i.e. nearly a quarter of land use change from 1985 to 1994 was from rural to urban^x.

Initiatives such as the greenbelt policy which aim to prevent urban sprawl are in place but development is still permitted. 'An average of 2,400 acres of undeveloped green belt is being built on each year; this is a total of more than 15 sq miles - bigger than the city of Lincoln - between 1997 and 2001 alone.'^{xi}

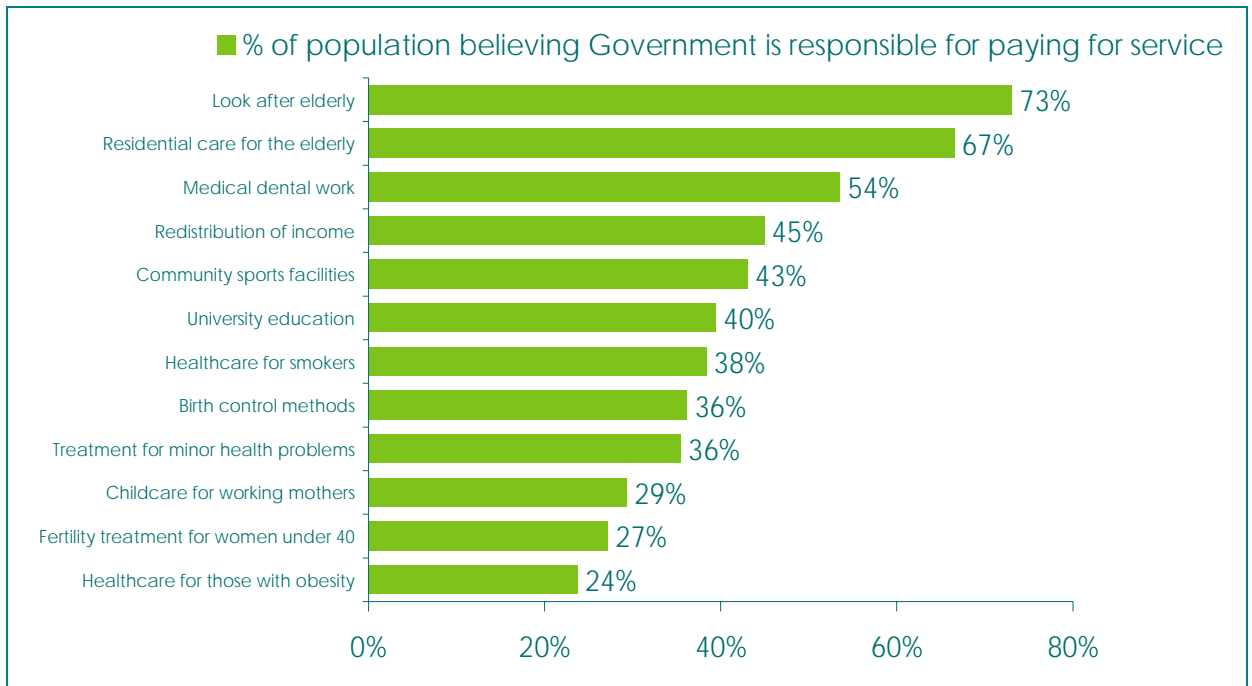
At first glance, therefore, urban expansion could reduced the **quantity of resource** available for outdoor recreation if development happens at the expense of the rural environment. It can be argued, however, that urban fringe land is intensively farmed with little or no recreational access. Urban expansion, therefore, if effectively managed has the potential to introduce new and better designed outdoor recreational space. Mechanisms for continued management and maintenance, however, are also needed.

Without effective management, urban expansion could be disadvantageous for those within inner city locations who already have difficulty gaining **access to outdoor space**. Infilling in cities through the use of brownfield sites, which could otherwise be used as open space, will also exacerbate this problem .

2.4.3 Exploring the effects on supply of places for outdoor recreation

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| <p>Opportunities</p> | <ul style="list-style-type: none"> • Urban expansion, when effectively designed to introduce spaces such as parks, green areas, gardens etc., has the potential to improve the quantity and access to spaces for outdoor recreation. • Urban regeneration, when converting derelict land into green spaces helps alleviate the scarcity of resources available for outdoor recreation. The introduction of city parks, tree-lined streets and squares etc., is particularly significant for the supply of spaces for certain types of everyday activities, such as 'just being outdoors' and 'informal games and play'. • By improving the urban environment in general, urban regeneration will also improve the quality of places for everyday activities such as 'just being outdoors' and 'utility journeys'. • By increasing green spaces within urban centres, regeneration will make the supply of places more strategic. Urban green spaces facilitate easier access to the outdoors for all urban dwellers, and will help supply target groups that may feel relatively excluded from outdoor recreation. • Greater quantity and quality of urban green space may help manage the demand for other areas by, for example, providing readily accessible alternatives to honey pot sites. |
| <p>Threats</p> | <ul style="list-style-type: none"> • More expansion of the urban landscape may come at the expense of urban fringe land which can form an important part of the supply for outdoor recreation. Unless explicitly managed to do otherwise, urban expansion could reduce the quantity of space available for outdoor recreation. • Urban green spaces may facilitate greater participation in outdoor recreation by making open spaces more accessible for people. There are, however, strong concerns about the quality of spaces, not least of all, the safety of such areas. |
| <p>Additional challenges</p> | <ul style="list-style-type: none"> • Urban regeneration is an objective in its own right. It has many additional benefits outside the realms of outdoor recreation, such as enhancing the economic performance of areas, raising the living standards and overall quality of life of those within inner city locations. Opportunities may emerge as a result of the strong synergies between urban regeneration and outdoor recreation. These links should be explored further and the connections between the two agendas promoted. |

2.5 Changing Public Sector Priorities



Source: Henley Centre HeadLightVision, Planning for Consumer Change (PCC) Survey, 2004

The demands on the public purse are many and varied. Calls for improvement in service are widespread and apply to most areas of public provision. The British public hold the Government responsible for a substantial number of diverse and costly issues. Yet taxes are set to remain around 41 to 42% of GDP. A significantly lower level than those levied in the rest of Western Europe (e.g. 56% in Sweden)^{xii}.

At the same time, however, issues such as the environment and healthcare are becoming evermore important and are rising up the political agenda. Healthcare issues, such as child diets/obesity, have benefited from high media coverage and have sparked public interest. The mounting costs of the NHS continue to be a highly relevant concern for government. At the same time, big environmental issues, such as climate change and natural disasters, continue to elevate the importance of the environment. The critical nature of these two subjects may mean that, despite continued financial pressure on government, recognition of health and environmental priorities continues to grow. It has been argued that outdoor recreation has a significant part to play in both areas. A shift in public priorities towards these fields, therefore, presents a considerable opportunity for outdoor recreation.

Conversely, however, there are numerous public sector objectives that are also high priority areas and potentially detrimental to the promotion of outdoor recreation. Urban expansion and the acquisition of land for residential use, for example, may be a threat to the supply of places for outdoor recreation. Growth in residential areas may, if not carefully managed, reduce both the quantity and quality of the outdoor environment. However, the need for

affordable housing, for example, has a far more immediate and tangible economic, political and social benefit. Such needs frequently take priority over the environment, conservation and outdoor recreation.

Similarly, it was felt, that outdoor recreation has a relatively weak voice on the transport planning agenda. Changes in traffic infrastructure have a big impact on the supply of places for recreation. It plays a critical role in improving access to places and could help the management of sites by dispersing demand. Plans for transport infrastructure development may also have significant negative impacts on the quantity and quality of space for outdoor recreation.

As a result of the relatively low priority attached to outdoor recreation in comparison to these other key objectives, it was felt that outdoor recreation frequently falls between the gaps of competing agendas. To prevent this outcome, it was argued that outdoor recreation needs to have a strong voice with a clear objective and to limit its reliance on association with other prevailing themes. Outdoor recreation needs to become important in its own right.

The very nature of public sector priorities was also highlighted as an area of considerable concern, especially when coupled with actual public spending commitments. Respondents argued that the volatile nature of public sector objectives, heavily exposed to political will, posed a potential hurdle to the work of Natural England. The promotion of outdoor recreation raises the need for enduring commitment and, with it, sustained funding, especially when considering the long-term nature of the initiatives required to bring about real change.

2.5.1 Exploring the effects on supply of places for outdoor recreation

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| <p>Opportunities</p> | <ul style="list-style-type: none"> • The continued importance of health and the environment on the political agenda and the considerable synergies between these issues and outdoor recreation have been recognised. These links are being used to promote outdoor recreation and to raise its profile throughout government. Executive interviewees argued that this favourable change in public priorities had given them, and outdoor recreation, a stronger voice in their dealings with different organisations. In relation to the supply of places, this means that there is potential for Natural England to have a stronger voice against competing agendas, for example, within the transport agenda. Furthermore, through a stronger voice, Natural England could seek to have greater influence over the planning decisions for urban regeneration and expansion. Essentially, with a stronger voice supported by synergies with other important agendas, Natural England should seek to preserve and promote the quantity and |
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| | quality of supply for outdoor recreation against potential threats. |
| Threats | <ul style="list-style-type: none"> • The strong synergies between outdoor recreation and other policy areas could create heavy dependencies between them. If the political agenda were to change, if health and the environment were to become less importance, public attention and media could shift onto other areas. It was argued that outdoor recreation needs to become an important issue in its own right. • It was felt, that having synergies with several different public priorities can mean that outdoor recreation falls 'between the gaps' of other policy objectives. Careful co-ordination with other departments, to maximise the benefits and avoid the 'gaps' is essential. • The very nature of public sector priorities was also highlighted as an area of considerable concern. The development and maintenance of the supply for outdoor recreation raises the need for enduring commitment and with it sustained funding. |
| Additional challenges | <ul style="list-style-type: none"> • Workshop participants and executive interviewees stressed the importance of a clear vision on outdoor recreation for Natural England and the need for a strong voice in support of that vision at the national and local level. • There was recognition of a need for an outdoor recreation champion with in Natural England. |

For a more detailed discussion on the relationship between outdoor recreation and health and wellbeing please refer to the 'Health and outdoor recreation paper' accompanying this report^{xiii}. For a more detailed discussion on the impact of planning structures on outdoor recreation please refer to the 'Planning for outdoor Recreation' paper which also accompanies this report^{xiv}.

2.6 Influence of large leisure providers

The growing demands of modern day life have increased perceptions of time pressure amongst the general population. Convenience has become a familiar trait of today's society and is in evidence throughout all aspects of day to day life. Consider, for example, the growth in convenience food, ready washed vegetables and speed dating. Life has become increasingly commercialised and a significant amount of life is packaged, marketed and sold to us, from food through to holidays, through to dating and even 'experiences' e.g. Red Letter Days^{xv}.

Given the prevailing trends towards greater commercialisation of other areas of life, it was thought that outdoor recreation itself may *have* to become more commercialised to meet consumer expectations or may become so as big leisure providers take on a more dominant role. As such, increasing

commercialisation of outdoor recreation was also identified as a key factor influencing the supply of places for recreation in the future. Examples of this trend include the business success of companies such as Centre Parcs, the development of other organised recreational bodies such as local football teams, even the increased focus on kit, equipment and gear as typified by the prominence of brands such as 'Blacks'.

Outdoor recreation, as defined by this paper does not include commercially organised recreation. The influence of such recreation, however, on the supply of places and on wider perceptions of the quality of spaces may still be important. The growing influence of commercialisation could mean that outdoor recreation is increasingly experienced through large leisure providers and in the 'format' which they supply. Due to corporate liability, for example, companies are required to make outdoor recreation 'safe', and they have a greater incentive to invest in facilities e.g. parking, roads, restaurants and toilets. This standard may therefore become more familiar to the population and will begin to influence their expectations of the wider outdoor experience. Users may, for example, begin to expect well maintained facilities in urban or national parks, a larger variety of activities to be available, or attractive and easily accessible information at their finger tips, and even an obligation for a third party to manage the risks they face within the outdoor environment. Negative experiences within spaces relevant to Natural England will be all the more striking. The **quality of places** for outdoor recreation, as defined within this paper, will need to meet these rising expectations if participation is to be sustained and promoted.

2.6.1 Exploring the effects on supply of places for outdoor recreation

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| <p>Opportunities</p> | <ul style="list-style-type: none"> • Stakeholders felt that, in the context of the supply of places for outdoor recreation (as defined by this paper), there are few benefits to be had from the growing influence of large leisure providers. • The benefits of large leisure providers in the context of demand, e.g. increasing familiarity with the outdoors and promoting participation, are recognised, but felt to be irrelevant to the discussion on supply. |
| <p>Threats</p> | <ul style="list-style-type: none"> • Will the increasing influence of large leisure providers detract from a more 'natural' outdoor experience? Should the supply of places for outdoor recreation (as defined within this paper) be used to preserve that experience or should it adapt to these changing expectations? Is it possible to effectively manage places for outdoor recreation to do both? • Access to outdoor recreation may be perceived to decrease as the influence of large leisure providers increases. If outdoor recreation is increasingly associated with large leisure providers, certain groups within society, |

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| | <p>such as lower income groups, may feel more excluded from outdoor recreation. In the context of the supply of places, this means that ease of access to non-commercial outdoor space becomes even more important.</p> |
| <p>Additional challenges</p> | <ul style="list-style-type: none"> • Large leisure providers offer a powerful channel for engagement between the wider population and outdoor recreation. Their commercial approach is met by a willingness to purchase the experience of outdoor recreation. Large leisure providers could be seen as partners to Natural England, and other supplier of 'commercially run activities' in the promotion of outdoor recreation and offer valuable learning in the management of places. • Large leisure providers could be encouraged to make significant contributions to the delivery of nature conservation targets. For example environmental education and responsible recreation on Centre Parcs sites and where possible large land owners contributing to local and national Biodiversity Action Plan targets. |

2.7 Access to places for outdoor recreation

2.7.1 Increasing access: Entitlement and rights of access

The increasing affluence of society, coupled with growing income disparities, have fuelled a greater sense of individual right. Within the commercial arena this awareness of personal empowerment has manifested itself as growing 'consumer empowerment.' Similarly, within the public sector, the public have a greater sense of 'individual entitlement.' The Human Rights Act for instance and Freedom of Information are forms of legal and government access. Similarly, rights of physical access to land and buildings are increasingly embedded in law.

The right of access to areas for outdoor recreation has been a high profile issue for some time and has led to the introduction of a new statutory right of access to open country and registered common land under the CROW Act. The Act also introduced measures to modernise the rights of way system, and provided better management arrangements for Areas of Outstanding Natural Beauty (AONBs).

Our sense of empowerment could spread further into the public arena and our sense of entitlement to public services may grow. Within the context of outdoor recreation this could lead to intensified demands for access to all kinds of outdoor space by more user groups.

2.7.2 Increasing access: social inclusion

The continued drive for greater inclusion of certain groups within society will also have implications for the supply of places for outdoor recreation. It was argued that the needs of certain groups within society should be factored into the supply of places in order to promote their participation. The Disability Discrimination Act 1995 (DDA) made it compulsory for service providers to consider making reasonable adjustments to the way they deliver their services so that people with disability can use them. A range of barriers to access to the countryside for people with disability were identified in the 'Sense and Accessibility' study commissioned in April 2000^{xvi} and more recently in the CA advisory booklet 'By all reasonable means'.

These barriers were categorised into five key groups: information; physical; cultural and psychological; transportation; and financial. These categories can also be used to capture the barriers inhibiting the participation of many other groups within society. They are also applicable to the elderly, to those in lower income household and those belonging to different ethnic communities for example. It must be recognised, however that some of the physical barriers, in particular, are inheritant to certain outdoor spaces. Steps, stiles, natural gradients, severe rutting and significantly unstable surfaces (e.g. mud and sand)^{xvii}, for example, present particular difficulty.

Stakeholders felt that many groups may, for a wide range of reasons, feel excluded from outdoor recreation of one kind or another. The growing importance of social inclusion, coupled with the growing diversity of society has been recognised. In order to promote participation in outdoor recreation from the whole breadth of society, aspects of the supply of places such as location and facilities need to take into account the differing needs of such a diverse consumer base.

2.7.3 Exploring the effects on supply of places for outdoor recreation

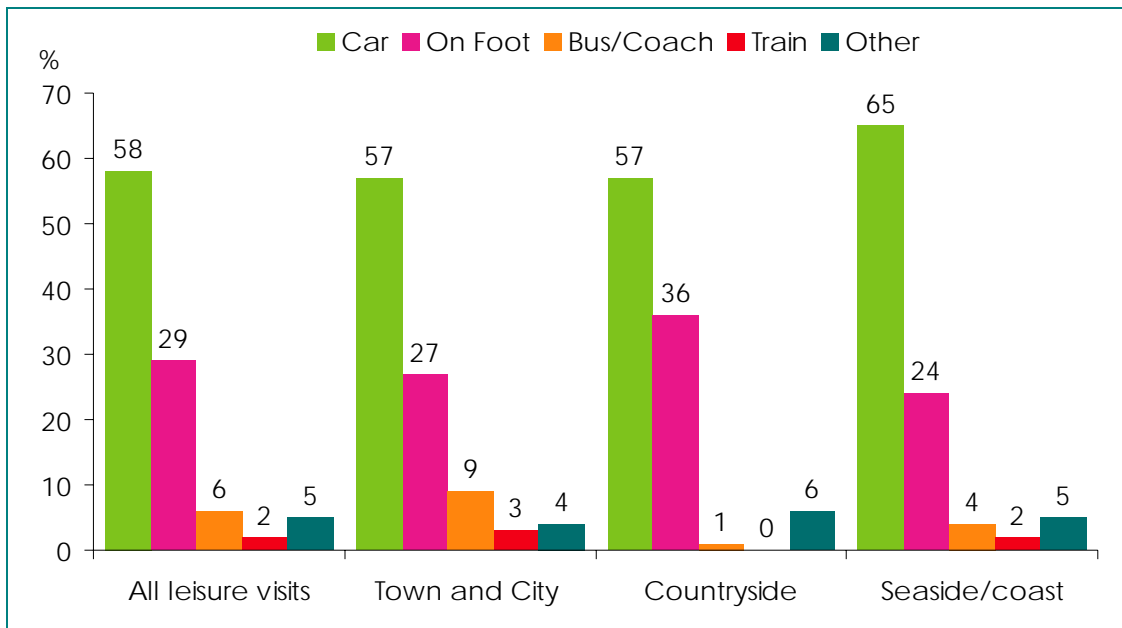
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| <p>Opportunities</p> | <ul style="list-style-type: none"> • It was argued that Rights of Way and open access under CROW have very significant benefits for outdoor recreation. These changes increase available land at a very fundamental level by increasing the quantity of accessible resource for outdoor recreation. • This will benefit the provision of spaces for all kinds of activities including 'just being outdoors activities', 'creative activities', for 'health and relaxation' purposes, for 'Educational activities and programmes', for 'conservation volunteering', as well as for 'sustainable journeys to outdoor recreation' • Increased access to land may lead to greater familiarity with outdoor recreation and rural tourism for those within rural communities, especially the land owning community. If the potential economic benefits to rural communities are |
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| | <p>realised, then support for further access and promotion of recreation could grow, leading to even greater access to and quantity of land.</p> |
| Threats | <ul style="list-style-type: none"> • As with diversification, legislative change facilitating greater access to land will introduce significant change to the affected communities. Stakeholders felt that such change could lead to conflict over certain types of 'irresponsible' use of the rural environment, which in turn has the potential to damage relations between important stakeholders. Guidelines and clear information are important tools for managing access to this newly available resource. • It was also argued that, despite progress in rights of access, this alone was not enough to promote wider participation in outdoor recreation. Stakeholders felt that, whilst existing users are likely to make more use of the available land, interest in outdoor recreation will not be forthcoming from others purely because people have the right to access certain spaces. Information and active promotion are needed to grow participation. |
| Additional challenges | <ul style="list-style-type: none"> • Information concerning rights of access, as well as more general information to increase the awareness of opportunities for outdoor recreation, play an important role. Better availability of clear and relevant information has the potential to increase confidence and familiarity with outdoor recreational opportunities, and so make the most of the Rights of Way initiative. • It was argued that increasing access to outdoor spaces raises important implications for land management. Are the facilities for outdoor recreation and supporting infrastructure sufficient to cope with increased access? Are there sufficient structures and resources in place to facilitate the effective management of conservation and recreation in order to preserve the outdoor environment for current and future users? (For a more detailed discussion on the management of conservation and recreation please refer to the 'Planning for outdoor recreation' paper^{xviii}). |

2.8 Growing tensions over transport infrastructure and networks

In this section we examine the impact of the changing transport infrastructure (number and state of roads, rail links etc.) on outdoor recreation, before going onto look at the impact of the transport network (integration and frequency of bus and rail services etc.) on outdoor recreation.

2.8.1 Changing transport infrastructure



Figures show % of visits accessed by each mode of transport

Source: UK Leisure Day Visits Survey, 2002-3

In the last half century, the economic and social benefits brought about by motorised travel for people and goods have been substantial. Economies have prospered from the expanded inter-urban road infrastructure. Personal mobility, predominantly by car has increased quality of life, convenience and choice for many people, including those who commute from rural areas and those who have greater access to the countryside for leisure.

- **Access to spaces**

- For a large, and growing, proportion of the population the private car will be the primary means of access to superior spaces for outdoor recreation which tend to be located further away from urban centres. Road infrastructure, therefore, is an important means of access to such spaces. Given current trends in private car ownership (the proportion of the population owning two cars increased from 20% to 33% between 1987 and 2004^{ix}) road infrastructure is set to become an evermore important means of access to, further away, spaces for recreation.
- For large numbers of the population, therefore, the inadequacy of the transport infrastructure will limit access to places for outdoor recreation and may present a significant barrier. Road congestion, for example, has been identified as a significant barrier to participation by potential users of outdoor recreation^{xx}.
- At the same time, however, if access to high quality outdoor space becomes more dependent on the private car this will have serious social implications for those without cars, e.g. poorer households, older age groups and people with disability.

- The network supporting walking, cycling, horse riding and other forms of movement is a vital resource for outdoor recreation and is also under threat. Stakeholders felt that the potential threat of growing tensions over transport infrastructure to other spaces for outdoor recreation, such as footpaths and bridleways^{xxi}, needs to be recognised.
- **Quality of spaces**
 - Many stakeholders felt that, despite the growing importance of removing congestion and traffic management, the growing dependency on the car for access to recreation will be significant.
 - Many commented on the environmental impacts this would have. It has been argued that smoother, wider roads have come at the expense of the natural beauty and tranquillity of the countryside^{xxii}. The threat of increased dependence on motorised travel will lead to further problems with congestion, noise and other pollution detracting from the quality of outdoor spaces.

2.8.2 Transport networks

The significant threats of growing tensions over transport infrastructure, discussed above, highlight the importance of sustainable alternatives of access to outdoor space, such as the transport network.

- **Access to spaces**
 - The current shortcomings of the transport network are a significant barrier to participation in the outdoor environment, making it harder for people to access places for recreation. In rural and sparsely populated areas, in particular, public transport networks are limited and often more expensive than in urban areas^{xxiii}. There remains a strong case for improvements to rural transport networks in particular, as alternatives to the use of the private car are more limited. Overall, car ownership in rural areas is significantly higher than in urban England.
 - The transport network is of particular importance for those without cars e.g. poorer households, older age groups and people with disability. Without adequate transport provision these groups will find it harder to access spaces for outdoor recreation.
 - Wider alternatives, such as cycling/walking networks, have the potential to significantly improve access to spaces for outdoor recreation within the urban and rural environments. Stakeholders recognised such infrastructure as an important alternative means of access to outdoor recreation.

The resource for 'sustainable journeys to outdoor recreation' forms a significant element of outdoor recreation as defined within this report. Of particular importance to outdoor recreation, therefore, is the need for a sustainable transport infrastructure, where improved access is married with effective management and conservation of sites and the surrounding environment. Further opportunities for sustainable alternatives to car use should be identified and promoted, as should the creation of more places for outdoor recreation within walking/cycling distances of populations.

2.8.3 Exploring the effects on supply of places for outdoor recreation

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| <p>Opportunities</p> | <ul style="list-style-type: none"> The 'growing tensions over transport infrastructure' have highlighted the need for more sustainable solutions to transport, such as improved transport networks and greater provision of other alternatives to the private car, such as cycle routes and footpaths. In terms of supply for outdoor recreation, this has the potential to increase the quantity of resources available for 'sustainable journeys to outdoor recreation' and 'utility journeys.' If the shift to sustainable solutions is significant enough, it could also help improve the quality of space for certain recreation activities such as 'just being outdoors' and certain places, such as urban parks and other green spaces. |
| <p>Threats</p> | <ul style="list-style-type: none"> Stakeholders felt that growing tensions over transport infrastructure could lead to the erosion of some important components of the outdoor recreation infrastructure such as bridleways and footpaths and so reduce the quantity and quality of places for recreation. Busy roads, for example, may cut through walking, horse-riding and cycling routes and threaten other public rights of way. Traffic on rural roads are considered, by some, to be too dangerous for cycling, walking or horse-riding. The quality of outdoor space is a significant feature of the supply of places for outdoor recreation. Conservation, tranquillity and the preservation of natural beauty is potentially at risk from our growing dependence on the private car and expansion of the transport infrastructure. |
| <p>Additional challenges</p> | <ul style="list-style-type: none"> Stakeholders felt that none of the existing three partner organisations have a loud enough voice on the transport agenda and that the interests of outdoor space and recreation are considered a low priority in this area. Stakeholders felt that, through synergies with other important issues, such as health and the environment, Natural England has the potential to increase the voice of outdoor recreation on the agenda of other organisations. Stakeholders felt that in order to address the transport issues outlined above, champions of outdoor recreation should work more closely with other bodies to ensure the management of transport infrastructure and networks takes into consideration the concerns of outdoor recreation and a sustainable environment. Stakeholders felt that more should be done in terms of plans |

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| | <p>for public transport provision, provision of cycle routes and other possible solutions, such as congestion charging.</p> <ul style="list-style-type: none"> • It was argued that, transport infrastructure and networks could be used as a tool to manage demand and hence the pressures on supply. Investment in certain routes will improve access to particular sites and may therefore help reduce the burden of demand on others. |
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For further discussion on the impact of transport infrastructure and networks on outdoor recreation please refer to the 'Planning for outdoor recreation' paper^{xxiv}.

2.9 Review of key drivers

The prioritised drivers discussed above have been identified as the most significant high level factors affecting the supply of places for outdoor recreation to 2025. Each driver of change has the potential to significantly influence the future of outdoor recreation whether through its influence on; the **quantity of supply**, and so scarcity of resources available for outdoor recreation; on the **quality of supply** which takes into account a number of different factors; and/or on the ease of **access to places** for outdoor recreation.

The breadth of the definition of outdoor recreation used in this paper, and so the wide range of activities outdoor recreation incorporates, means that each driver has the ability to influence the future of outdoor recreation in multiple ways: For instance, urban regeneration should; improve provision for 'utility journeys'; improve the experience of 'just being outdoors' and 'on the doorstep recreation'; lead to more provision of parks and green areas benefiting 'informal play and games.' At the same time, growing tensions over transport infrastructure (unless explicitly managed to do otherwise) may threaten the provision of cycle routes and may, through increased congestion, reduce the quality of city parks and tree lined streets.

Ultimately, therefore the drivers result in a complex set of driver specific threats, opportunities and challenges impacting the different areas of outdoor recreation in different ways. For this reason, it is important to take this analysis a step further and look at the relationship between the prioritised set of drivers and how their influences play against or reinforce each other. The next section of the report explores what happens when we look at the impact of the drivers in the context of one another.

In the 'Demand for recreation' and 'Planning for recreation' papers, this section is followed by discussion on the 'Barriers to outdoor recreation'. In the 'Demand for outdoor recreation' paper these barriers are discussed from the perspective of the potential user. ^{xxv} The paper also incorporates findings from the three user focus groups, carried out in August 2005. The selected

participants were filtered for being low or non users of outdoor recreation and came from a cross section of society. Full analysis of the focus group output is available in 'Appendix J: Understanding the barriers to participation in outdoor recreation: Qualitative research component for Natural England.' The 'Planning for outdoor recreation' paper develops this discussion further by looking at the difficulties facing supply and planning when trying to overcome these barriers. Between them, the two papers provide a comprehensive discussion of the barriers to participation in outdoor recreation. The 'barriers to recreation' section has, therefore, been omitted from this report and the reader is referred to the 'Planning for outdoor recreation' paper for a discussion of the barriers relevant to the provision of places.

3 Uncertain outcomes

3.1 Introduction

In order to understand future areas of uncertainty in the context of the supply of places for outdoor recreation, the prioritised drivers discussed above, as well as additional relevant drivers, and sub-drivers of change were mapped onto each other. That is, they were analysed in the context of one another.

The process through which this analysis was carried out is described in more detail in 'Paper 1: Background and introduction to research.' Essentially, it maps the relationship (in terms of impact) between all of the major influences, to determine, both, the importance of their impact on the future supply for outdoor recreation, as well as the uncertainty of that impact. The result of this mapping is an impact matrix which shows, on one hand, the importance of each driver and, on the other, the degree of uncertainty and therefore, potential for influence that particular factor provides for the future of outdoor recreation.

The resulting impact matrix for the future of supply for outdoor recreation is shown below, with supporting commentary to follow. It should be noted that the 'importance' and 'openness to influence' of each driver has been assessed within the context of the 'supply of places' only. The 'importance' and 'openness to influence', and therefore, position of each driver on the impact matrix below may vary from paper to paper, as each paper and impact matrix focuses on a different area of outdoor recreation. (See 'Appendix J Comparison of impact mapping across papers 2 to 6' for more detail).

Impact Matrix

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|-------------------|------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| High Importance | Increasingly affluent society Increasing disparities of income | Diversification | Entitlement |
| Medium Importance | Growing personal transport demand Public spending priorities Growing influence of lobby groups | Wellbeing Increasing spend on leisure Growing influence of large leisure providers Changing urban landscapes Increasing mixed use of land | Increasing access Growing tensions of transport infrastructure |
| Low Importance | Changes in land use CAP reform | Private sector investment in outdoor facilities | |
| | Low potential to influence | Some potential to influence | Significant potential to influence |

Source: Henley Centre, 2005

3.2 Drivers over which there are few levers of influence

This impact matrix above tells us that there are several drivers, shaping the future supply for outdoor recreation, over which there appears to be very little scope for influence. These range from wider societal trends such as **increasing affluence of society**, and **growing disparities of income**, to underlying political factors, such as **changes in public sector spending priorities**, the **growing influence of lobby groups**, **CAP reform** and **changes in land use** (growth of residential land for example).

For drivers of this nature, the challenge is to calculate a response which accepts that these factors will be important influences shaping the future of the supply for outdoor recreation and takes them into account in future strategy.

Appropriate responses might include for example, looking for ways to promote the opportunities for outdoor recreation in and around urban areas. So that lower income groups still have access to outdoor recreation. Similarly, a future strategy needs to be robust against changes in public priorities given the important influence of this area. An appropriate response might involve forging new, or strengthening existing, partnerships with organisations supporting other important public issues, such as health and the environment. Through these partnerships, stakeholders can work to ensure the supply for outdoor recreation is high on the agenda and is factored into the plans of other organisations.

3.3 Secondary influences

The impact matrix suggests that there are a significant number of drivers shaping the future of outdoor recreation, over which there appears to be some scope for influence. Some of these drivers are related to wider trends in the leisure sector such as **increasing personal spend on leisure**, the **growing influence of large leisure providers** and the **growing importance of wellbeing**. For drivers of this nature, the challenge is to understand their impact on outdoor recreation and calculate a response which accepts that these factors will be important influences of future supply for outdoor recreation, but to also identify ways in which their impact on outdoor recreation can be influenced.

In the case of increased personal spend on leisure, an appropriate response might be to build a better understanding of the position of outdoor recreation in the minds of potential users. What activities, outside the scope of outdoor recreation, does the outdoor recreation experience compete against (i.e. what is the competitive set of outdoor recreation)? If the outdoor recreation experience is not competitive against this set of alternatives (i.e. if it is not of adequate **quality** and is not easy to **access**), then the return on investment in places for recreation, the sustainability of places for recreation and the ability for diversification of land into outdoor recreation, for example, will become limited. (This issue is explored further in the 'Impact of outdoor recreation' paper).

The position of **diversification** of land use within the impact matrix is significant. Its position reflects the view that diversification is an issue over which stakeholders have some, though limited, scope for influence. Its position also identifies diversification as an issue of high importance, with potentially significant consequences, for the supply of places for outdoor recreation.

Its position on the impact matrix, however, provides only half the analysis. When looking at the diversification issue within the wider context, stakeholders agreed that though diversification is an important issue for supply, the limitations facing diversification due to the current planning and incentive frameworks, which do not prioritise the supply of outdoor recreation, are highly significant. Though diversification, therefore, presents considerable opportunity for outdoor recreation, stakeholders felt that these opportunities were unlikely to be realised. (For further discussion on the constraints facing the influence of diversification please refer to the 'Planning for outdoor recreation' paper).

3.4 Critical uncertainties

The most uncertain drivers are the ones that have both high importance and a significant potential to influence (those that lie in the top right hand corner of the matrix). The following section identifies the uncertainties facing the supply of outdoor recreation and highlights which of the drivers it is influenced by, as well as those that it influences. At the end of the commentary, there is an exploration of the best case and worst case outcome, illustrating how the

uncertainty could play out in the next twenty years. It is a consciously provocative exercise which picks the two extreme poles of the possible future.

3.4.1 Increasing access and entitlement

Entitlement

The **increasing affluence of society** coupled with **growing income disparity within society** have fuelled a greater sense of individual right; the more affluent may value their contribution to society more and expect more in return; and for lower income groups, the assertion of their public rights forms an important part of their social and political equality. Within the commercial arena this awareness of personal rights has manifested itself as growing **consumer empowerment**. Where increasing affluence has enabled consumers to be more active; they demand more from the products they purchase, the services they source and are generally harder to please.

This sense of empowerment may translate into the public sector as a growing sense of **entitlement**, where the public are keen to understand and exercise their rights. Entitlement however is not a trend exclusive to the higher income brackets of society. As stated previously, the Human Rights Act and Freedom of Information are forms of legal and government access. Similarly, rights of physical access to land and buildings are increasingly embedded in law.

In the area of outdoor recreation, as we benefit from increasing economic prosperity and growing disposable incomes, and as our attention shifts away from material goods and towards aids to wellbeing and the **experience economy**, our ability to access spaces for recreation could become increasingly important and our sense of entitlement to that space may grow.

The extent to which entitlement will manifest itself within the outdoor recreation arena, however, is very uncertain and dependent on a number of other drivers. For instance, to what extent will our sense of **wellbeing** become associated with outdoor recreation considering the wealth of other wellbeing enhancing alternatives available to us, such as gymnasiums, yoga, meditation, or holistic medicines? To what extent will facilities and providers be able and/or willing to cater to the growing demands of the **experience economy**? The extent to which outdoor recreation will become familiar and relevant to modern life is explored within the 'Demand for outdoor recreation paper.'

Increasing access and transport

Increasing access, in its broadest sense, is about increasing the supply of 'places' and making it easier to use available places for outdoor recreation.

The overall ease of access to outdoor spaces is determined by a number of other important drivers. Future developments in **transport infrastructure and networks**, for example, will be particularly important because transport will have a significant impact on the accessibility of outdoor recreation for nearly

all of the population. Growing tensions over transport infrastructure and networks will make it harder for users to travel to sites.

Tensions over transport infrastructure are, however, influenced by a number of other factors, making this driver relatively 'uncertain'. These additional influences include, **changing urban landscapes**, for example. If urban landscapes are effectively managed to incorporate spaces for outdoor recreation, then the pressures on transport infrastructure elsewhere will be reduced. It should be noted however, that **growing personal transport demand**, which is a major factor in the growth of transport tensions, is situated towards the left of the impact matrix; it is important, but for Natural England, there is very little potential to change or influence the direction of this trend.

Similarly, **urban regeneration** initiatives and **changing urban landscapes** also have important implications for access to spaces for recreation. As discussed previously, **urban regeneration** could benefit 'on the doorstep' recreational initiatives.

Drivers such as **urban regeneration**, **tensions over transport infrastructure and networks**, and **changing urban landscapes**, which have all been identified as key drivers of change are, essentially, about **increasing access** to the supply of good quality places for outdoor recreation.

It is significant that our sense of **entitlement** to outdoor spaces and **increasing access** to outdoor spaces have emerged as the two areas of greatest uncertainty facing supply for outdoor recreation: Our sense of **entitlement** to outdoor space is analogous to our demand for outdoor space; whilst **increasing access** is about making it easier for participants to reach high quality outdoor spaces, i.e. the supply of places. The two areas of greatest uncertainty are, therefore, about the amount of demand supply will have to cater for and the ease of doing so, i.e. the accessibility of available supply.

The interdependent nature of these two drivers also adds to the uncertainty surrounding them: The easier it is to access spaces for outdoor recreation the greater will be the familiarity and relevance of outdoor recreation to modern life. Entitlement to outdoor space will, therefore, be more important to more people. Similarly, a greater sense of entitlement to outdoor recreation will, if realised through the strength of lobby groups, for example, lead to more demand for access to outdoor recreation.

It is critical to identify appropriate action in the face of such important and uncertain drivers. These factors could become significant threats (or at least missed opportunities) if they are not influenced in a positive direction. It is important to understand the nature of these drivers: to understand the complex relationship between **entitlement** and **increased access** and to address the underlying factors which can have an impact on **entitlement** and **access**, such

as tensions over transport infrastructure and networks, and the provision of 'on the door step' recreation.

3.5 Understanding the uncertainties

The nature of the different drivers highlighted above create two very different future outcomes. The most positive arrangement of these drivers derives from a growing sense of **entitlement** to outdoor space, driven by factors explored within the 'Demand for outdoor recreation' paper, and on **increased access** to spaces in order to meet that sense of entitlement.

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| <p>Best case outcome</p> | <p>The growing affluence of society leads to greater demand for leisure in general.</p> <p>Outdoor recreation becomes particularly relevant to a growing proportion of the population as the connection between good health and wellbeing and the outdoors and recreation become well established.</p> <p>The outdoor recreation experience becomes more sophisticated and diversified, offering the public a wider range of experiences. This is facilitated by greater incentives for landowners to diversify and to promote tourism and recreation. With greater resources, driven by the growing importance the wider public attach to outdoor recreation, investment in the natural environment, in facilities, and activities increases. Supply is able to cope with more and increasingly diverse demand.</p> <p>Improvements to transport infrastructure and better management, provision and design of facilities make it easier for all sections of society to participate in good quality outdoor recreation. Local outdoor spaces become more accessible to people, especially within the urban environment. Familiarity with outdoor recreation grows in both the rural and urban setting.</p> <p>Greater affluence, our desire for greater wellbeing through outdoor recreation, our growing engagement in the outdoor experience, and greater ease of access to the outdoors enhances our familiarity and sense of entitlement to outdoor space. Growing numbers of the public become engaged in the access debate, and are eager to enforce existing rights of access and to push for more rights of access.</p> |
| <p>Worst case outcome</p> | <p>The growing affluence of society leads to greater demand for leisure in general.</p> <p>There is little communication of the health and wellbeing benefits of</p> |

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| | <p>outdoor recreation to the wider population. The outdoor recreation experience is limited, and outdoor recreation activities remain firmly embedded within walking, cycling and horse riding. The wider population do not engage with outdoor recreation.</p> <p>The poor quality of spaces within and around urban centres is not addressed. Urban expansion continues to take place without making explicit provision for urban green spaces and 'on the doorstep' places for recreation. Urban regeneration is limited.</p> <p>Higher quality places for outdoor recreation continue to be situated away from urban centres. Dependence on the private car for access to such spaces grows and congestion in and around national parks etc. worsens. Transport networks and other sustainable alternatives do not facilitate easy access to the outdoors.</p> <p>There is limited diversification into outdoor recreation by landowners and large leisure providers continue to grow and offer a limited array of activities and to supply to those who can afford to pay for access. Owing to low levels of participation in outdoor recreation outside the realm of large leisure providers, the resources for effective management of sites, investment in the natural environment, facilities, activities and infrastructure such as bridleways, cycle routes and footpaths are not available.</p> <p>Potential participants continue to opt for better known alternative leisure activities to spend their increased leisure resources on. Participation in outdoor recreation remains limited and our familiarity with outdoor recreation does not grow. The access and entitlement debate goes on but continues to interest only a small proportion of the population which limits its success.</p> |
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It is important to examine the drivers and critical uncertainties highlighted above in the wider context of outdoor recreation i.e. beyond the limited scope of the supply of places, and take into account the demand for outdoor recreation, health and recreation and planning implications. This analysis has been done in the 'Paper 6: Impact for outdoor recreation' paper.

4 Critical issues

4.1 Introduction

Based on the combined output of the research discussed in this paper, this section explores the key insights, critical issues and key challenges that have emerged from this research process. The issues identified below are those that the Henley Centre believes the future outdoor recreation strategy will need to address if the supply of places for outdoor recreation is to support growing interest in this area.

The purpose of supply is to provide and maintain a high quality outdoor space, for people who desire to participate in outdoor recreation. The critical issues section looks at the barriers to doing so in the context of the three aspects of supply; quantity, quality and access.

4.2 Access related critical issues

4.2.1 Moving 'places' to people: Provision of 'on the doorstep' recreation

In terms of the supply of places, greater provision of 'on the doorstep' areas for recreation is needed. The introduction of more green spaces, such as parks, gardens, tree-lined squares and streets, to the existing urban environment is needed. This issue overlaps favourably with urban regeneration projects. Where urban expansion is occurring, the provision of adequate green space needs to be explicitly factored into the development plans.

The introduction of green spaces to the urban environment also needs to be coupled with more provision of sustainable means of access to these areas, for example, improved public transport networks and cycle routes.

The quality of urban spaces for outdoor recreation also needs to be addressed. Concerns over safety, facilities and the quality of the natural environment needs to be taken into consideration and resources to monitor and manage spaces on an ongoing basis need to be found. Stakeholders, for example, raised the possibility of making more use of the voluntary sector in the form of park wardens.

'On the doorstep' spaces for recreation are an excellent opportunity to address the three key aspects of supply: green spaces within urban regeneration projects, for example, will increase the **quantity of spaces** for outdoor recreation, it will improve **access to spaces** for outdoor recreation by bringing 'places' closer to the urban population in general and to certain groups within society who would otherwise be excluded e.g. low income families, those without cars. Green spaces and urban regeneration will also improve the **quality** of the outdoor environment overall which will benefit

provision for 'just being outdoors', 'utility journeys', and 'health and relaxation activities' for example.

In order to address this critical issue, substantial financial investment and long term commitment will be necessary. The nature of public spending priorities will need to be addressed. For instance, Natural England should promote outdoor recreation through its association with other important public sector issues such as health and the environment. Stakeholder also felt that Natural England should strive to make outdoor recreation an important issue in its own right. In either case, Natural England will need to have a strong voice in support of outdoor recreation, forge partnerships with other organisations that have synergies with Natural England, and work with those where conflict may arise. Essentially, Stakeholders felt that Natural England needs to act as a champion of outdoor recreation on a number of different, supporting and competing, agendas.

There are other significant barriers to addressing the critical issue of greater provision for 'on the doorstep recreation'. These are addressed under the heading of 'convenience of outdoor recreation' in the 'Planning for recreation paper' and 'Demand for recreation paper'.

4.2.2 Moving people to 'places': Sustainable transport

For a large and increasing proportion of the population, access to high quality places for outdoor recreation are typically reached through use of the private car. Current trends suggest that our dependency on this mode of transport to reach spaces for outdoor recreation will increase.

The growing tensions over transport in relation to outdoor recreation, need to be addressed: For example; the provision of transport networks, including public transport, around spaces for outdoor recreation need to be improved; transport infrastructure development needs to take into account the existing infrastructure for outdoor recreation such as bridleways, footpaths and public rights of way; the congestion and pollution effects of transport need to be minimised; and sustainable alternatives to the car, such as cycle paths, need to be promoted.

Transport infrastructure and network is a major issue influencing **access** to spaces for outdoor recreation. Furthermore, the way in which tensions over transport are dealt with may impact upon the **quantity** and **quality** of the surrounding outdoor environment.

A number of different activities can be employed to address this critical issue; for instance, in terms of the transport infrastructure and public transport agenda where outdoor recreation is of low priority, Natural England could work with organisations to champion outdoor recreation.

There are other significant barriers to addressing the critical issue of transport infrastructure. These are addressed within the 'Planning for recreation paper'.

4.3 Quality of outdoor spaces

The two critical issues discussed above relate, largely, to access to spaces for outdoor recreation. The following critical issues relate specifically to the quality of outdoor space.

4.3.1 Management of high quality natural environment and recreation

The importance of this issue has been highlighted within this report, and is discussed further within the 'Planning to outdoor recreation' paper. Stakeholders have argued that increased access to spaces for outdoor recreation calls for the effective management of recreation and conservation on a case by case basis. Support and drive at the national level will be important but resources and implementation need to be more targeted. For further discussion on this critical issue, please refer to the 'Planning for outdoor recreation' paper.

4.3.2 A broader outdoor experience and management of conflict between users

In order to broaden the participation of society in outdoor recreation the range of activities available for outdoor recreation may need to increase especially given the growing diversity of the leisure industry as a whole and the growing number of leisure pursuits available to potential participants. With greater diversity of involvement and wider participation in general, however, comes the need to effectively management potential conflict between users.

Stakeholders felt that it was important to assess whether or not the outdoor recreation infrastructure can support a more diverse range of activities and if so, to identify ways in which to accommodate different users, whilst also managing the environment. Wider stakeholders, such as landowners and large leisure providers may make effective partners in this area. Though care should be taken to ensure that high quality outdoor recreation does not become contingent upon the ability to pay for access.

The 'Planning for outdoor recreation' paper also raises this matter as a critical issue for the future of outdoor recreation and discusses some possible solutions such as regulatory sanctions and zoning of certain activities into certain areas. For further discussion of this critical issue, please refer to the 'Planning for outdoor recreation' paper.

4.4 Quantity/scarcity of outdoor spaces

Availability of land is a critical issue facing the long term supply of spaces for outdoor recreation. As stated in the introduction to this paper, land is a finite resource. Any expansion of resources for outdoor recreation is, therefore, limited by the availability of land. Due to the scarcity of land, resources for outdoor recreation are also limited by the objectives of competing uses such

as transport, urban expansion, defence use and agricultural use. Careful management of outdoor recreation and competing agendas is needed to limit the conflict between the wider uses of land. Natural England will need a strong voice to ensure outdoor recreation is taken into consideration.

4.5 Final words

These critical issues have been selected from some of the central themes emerging from this study. It focuses on the improvement of access to spaces for outdoor recreation, whether through the 'movement of 'places' to people', through more 'on the doorstep recreation' initiatives, or through the 'movement of people to 'places'' through improvements to sustainable transport. In addition to this, the study highlights the critical importance of managing greater demand for outdoor recreation; places will have to be effectively managed to ensure a high quality outdoor experience for all users.

Finally the paper, talks about the long term conflicts over land use threatening the availability of space for outdoor recreation at the more fundamental level. Due to the scarcity of land competing uses, such as residential use and transport infrastructure, may come to threaten the availability of land for outdoor recreation in the longer term.

An effective strategy for outdoor recreation will need to take these critical issues into consideration and examine them in the context of the other three paper areas; demand, health and planning. The 'Impact of outdoor recreation' paper goes some way to achieving this objective and the reader is referred to its content for further discussion on the above critical issues.

ⁱ Defra website, <http://www.defra.gov.uk/farm/capreform/index.htm>

ⁱⁱ Defra website, <http://www.defra.gov.uk/erdp/schemes/res/default.htm>

ⁱⁱⁱ HenleyCentre HeadLightVision, *Planning for outdoor recreation: A report for 'Natural England's' outdoor recreation strategy*, September 2005

^{iv} HenleyCentre HeadLightVision, *Planning for outdoor recreation: A report for 'Natural England's' outdoor recreation strategy*, September 2005

^v Department for Transport, Local Government and the Regions (DTLR), *Green Spaces, Better Places: Final report of The Urban Green Spaces Taskforce*, 2002 London.

^{vi} Department for Transport, Local Government and the Regions (DTLR), *Green Spaces, Better Places: Final report of The Urban Green Spaces Taskforce*, 2002 London.

^{vii} Department for Transport, Local Government and the Regions (DTLR), *Green Spaces, Better Places: Final report of The Urban Green Spaces Taskforce*, 2002 London.

^{viii} HenleyCentre HeadLightVision, *Understanding the perceived barriers to outdoor recreation: Qualitative research*, September 2005

^{ix} HenleyCentre HeadLightVision, *Understanding the perceived barriers to outdoor recreation: Qualitative research*, September 2005

^x Office of Deputy Prime,
http://www.odpm.gov.uk/stellent/groups/odpm_planning/documents/page/odpm_plan_607174-04.hcsp#TopOfPage

^{xi} Charles Clover, Environment Editor, The Telegraph, *2,400 acres of green belt lost each year*, June 2005, http://www.greenbelt-news.org.uk/articles/article_2400aogbley.htm

^{xii} 'Tax Rates: Income and Corporate Tax Rates 2004', Eurostat

^{xiii} HenleyCentre HeadLightVision, *Health and outdoor recreation: A report for 'Natural England's' outdoor recreation strategy*, October 2005

^{xiv} HenleyCentre HeadLightVision, *Planning for outdoor recreation: A report for 'Natural England's' outdoor recreation strategy*, October 2005

^{xv} The 'Red Letter Day' company provides packaged 'experiences' such as Formula One racing, hand gliding or steam train driving experiences. Where the sourcing of the 'experience' through to the packaging of it as a gift has been done for you.

^{xvi} The Countryside Agency, April 2002, *Sense and Accessibility: How to improve access on countryside paths, routes and trails for people with mobility impairments*

^{xvii} The Countryside Agency, April 2002, *Sense and Accessibility: How to improve access on countryside paths, routes and trails for people with mobility impairments*

^{xviii} HenleyCentre HeadLightVision, *Planning for Outdoor Recreation: A report for 'Natural England's' outdoor recreation strategy*, October 2005

^{xix} Source, BMRB, *Target Group Index (TGI)*, 1987 and 2004

^{xx} HenleyCentre HeadLightVision, *Understanding the Barriers to Outdoor Recreation*, October 2005

^{xxi} The Countryside Agency, *Rural Routes and Networks, creating and preserving routes that are sustainable, convenient, tranquil, attractive and safe*, Institution of Civil Engineers, 2002

^{xxii} The Countryside Agency, *Rural Routes and Networks, creating and preserving routes that are sustainable, convenient, tranquil, attractive and safe*, Institution of Civil Engineers, 2002

^{xxiii} ATKINS, *Integrated Transport in National Park*, March 2005

^{xxiv} HenleyCentre HeadLightVision, *Planning for Outdoor Recreation. A report for Natural England'' outdoor recreation strategy*, October 2005

^{xxv} HenleyCentre HeadLightVision, *Demand for Outdoor Recreation. A report for Natural England's outdoor recreation strategy*, October 2005