



HenleyCentreHeadlightVision

Paper 2: Demand 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 demand for outdoor recreation over the next 20 years. This report constitutes the second of six papers; it is preceded by an 'Background and introduction to research' and followed by analysis of the supply of outdoor recreation, planning of outdoor recreation, health links to outdoor recreation and impact of outdoor recreation (see Paper 1, 'Background and introduction to research').

As part of the process, Henley Centre identified the key drivers of change, the barriers, the uncertainties and the crucial questions that surround the future of demand.

The workshop stage of the project process (see appendix C: Trends assessment workshop presentation) prioritised the following seven drivers out of a list of 38 (see appendix B: Potential drivers of change in outdoor recreation to 2020) as the principal drivers of demand:

- Increasingly affluent society
 - Greater financial stability, leading to a greater ability to spend on leisure and experiences.
- Wellbeing
 - A heightened interest in quality of life, encompassing health, physical activity levels and connection with nature.
- Reconfiguring age
 - An ageing population, increasingly less inclined to be stereotyped combined with the changing lifestyles of children and young people.
- Increased availability of information
 - The role of clear and accurate information in informing and empowering people.
- Social inclusion
 - The current under-representation of low income and ethnic minority groups and the political will to reverse this trend.
- Risk averse society
 - An increasingly risk sensitive society.
- Convenience culture
 - A growing premium placed on convenience, fuelled by the increasing pressures of time.

The perceived barriers to demand that emerged through the first stages of the project were enriched by focus groups conducted at a later stage. A number

of barriers identified mirrored some of the prioritised drivers. Added to these, however, were the effects of time pressure, the difficulties of logistics and unreliability of facilities, the lack of significant appeal of the outdoors, perceptions of cost and the overall image of outdoor recreation.

To ascertain the most unpredictable drivers that will affect the future of demand for outdoor recreation, the prioritised drivers were analysed using a mapping process (see Paper 1, 'Background and introduction to research'). This identified the following four drivers (presented and discussed in the two workshops) that both influenced and were influenced by the greatest number of other drivers, i.e. the most uncertain:

- Retuned to nature
 - The growing desire to engage with the natural world.
- Drive to physical activity and health
 - Growing Government focus on increasing activity levels as a means of achieving better public health outcomes.
- Experience economy
 - The focus on experience over material goods.
- Changing lifestyles of children and young adults
 - The increasingly 'urban', sedentary and technology-led lives of young people.

As a consequence of this research the following critical issues have emerged:

- How can nature and physical activity be linked more closely?
- How can the 'value of recreation' be marketed in the convenience culture?
- What scope is there for outdoor recreation in an 'experience non-economy'? (i.e. seeking experience which you do not pay for)
- How can outdoor recreation move beyond its traditional image?
- What other channels can be used as a lever for engagement?
- Are the teenagers and young people of today a lost cohort?

These questions address potential areas where the future of demand for outdoor recreation could be influenced as well as the direction which may take over the next 20 years.

1. Background

Natural England will be a new organisation constructed from the merger of English Nature, the Rural Development Service, and the Landscape Access and Recreation division of the Countryside Agency. In May 2005, the Natural England partnership commissioned Henley Centre to inform on 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 different 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 is the second of these and addresses the following question:

“What are the key factors that will inform future demand 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 accompany 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 key factor that currently guides discussion around demand for outdoor recreation is the narrow range of current participants: they are still more likely to come from white, middle class, car-owning families. There are therefore significant concerns around the under-representation of low income groups, ethnic minorities and the younger generation¹.

Additional concerns surround the way in which conservation and recreation are integrated (discussed in greater depth in the Paper 5 'Planning for outdoor recreation'), the future validity of the health agenda (discussed in greater depth in Paper 3 'Health and outdoor recreation') and the uncertain effects of shifting societal trends.

Over the course of the project process these important issues are addressed by taking into account the social, economic, political and technological trends that have an influence on demand for outdoor recreation. This has included an exploration of the social inclusion and diversity agenda, the current economic future of the country and dominant societal trends (such as changing household structures and working patterns). This study aims to determine the drivers with the greatest influence on the future of demand, the factors which act as barriers to demand, the most uncertain aspects of the future of demand and the resulting critical issues for Natural England.

2. Drivers of change

2.1 Introduction

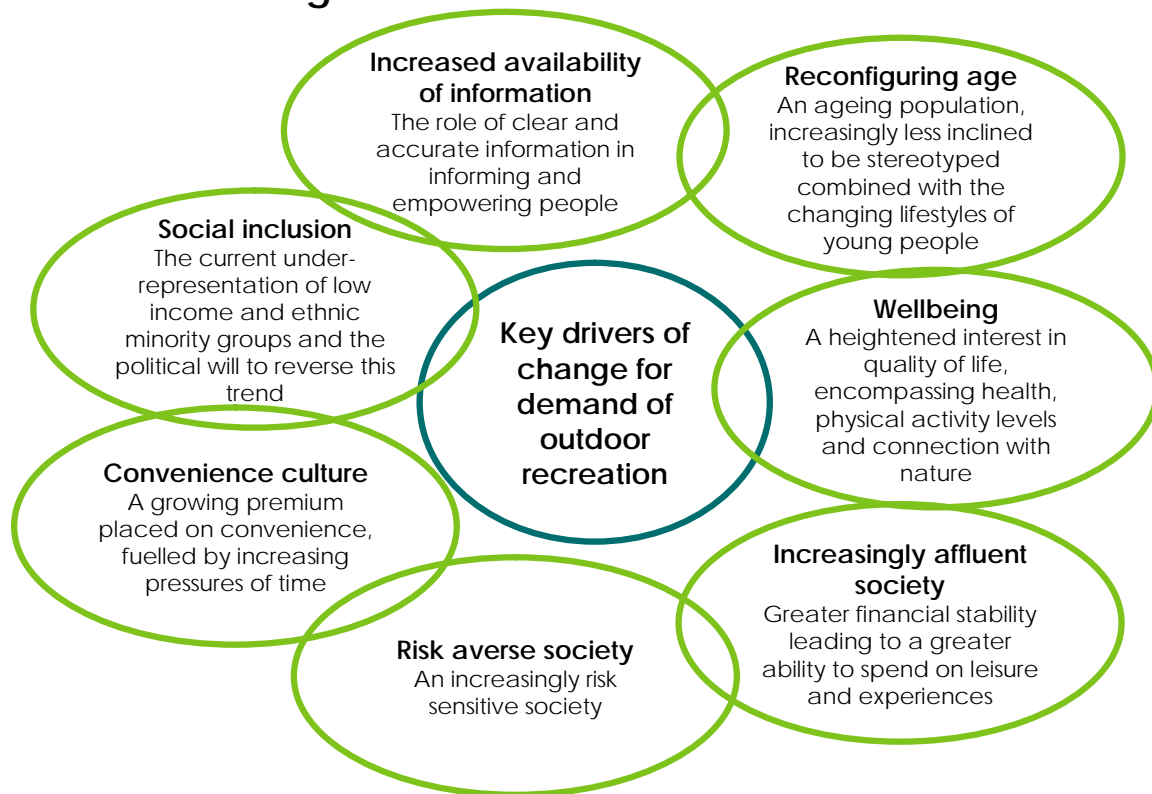
The following section of the report explores a number of 'drivers of change' (factors influencing the demand for outdoor recreation) in detail. The drivers that follow have been identified and prioritised as the most important factors determining the demand for outdoor recreation in England to 2025.

A list of 38 drivers was developed through a combination of desk research, review of Henley Centre's knowledge base, review of the Natural England partner organisations and a series of in depth executive interviews. The list was supplemented by two workshops with key stakeholders and experts (see Paper 1, 'Background and introduction to research'). As part of the workshop process, drivers were prioritised according to how relevant they were; seven drivers were selected as the most important drivers of change for demand places for outdoor recreation:

- Increasingly affluent society
- Wellbeing
- Reconfiguring age
- Increased availability of information
- Social inclusion
- Risk averse society
- Convenience culture

The following discussion takes each driver in turn, providing some background information before going on to explore the possible implications for outdoor recreation. The threats, opportunities and additional challenges of each driver are clearly highlighted.

2.2 Drivers at a glance

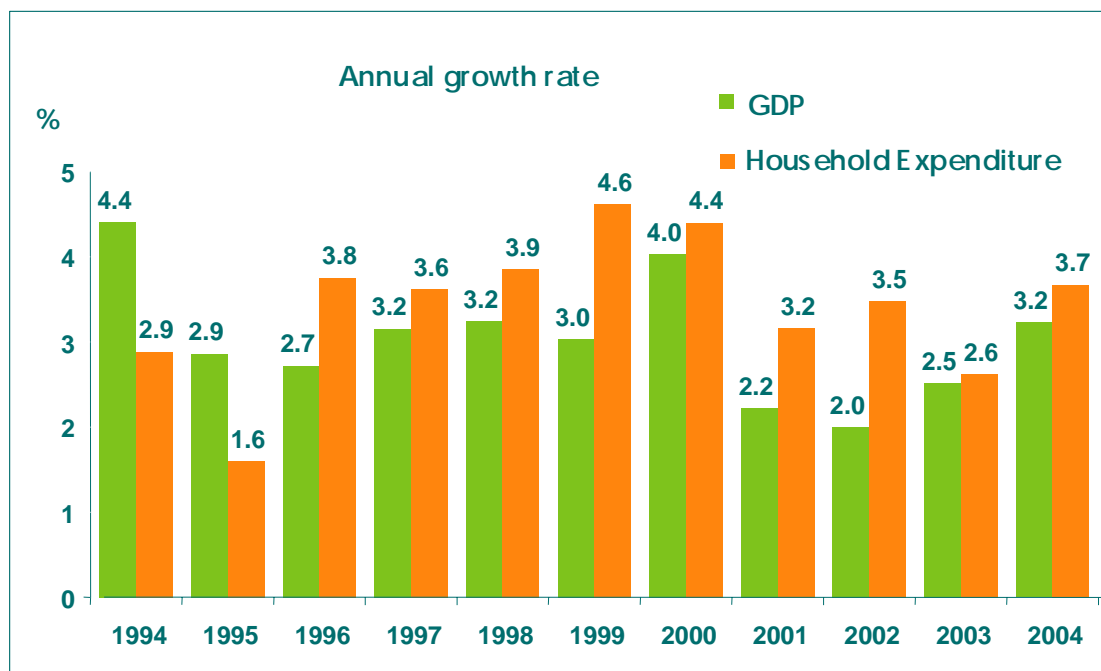


2.3 Increasingly affluent society

We are significantly better off than we were in 1990, with disposable income having increased by nearly 50% and discretionary income having increased by 55%².

Whilst consumer spending slowed in the first quarter of 2005, household expenditure has consistently outstripped GDP growth since 1996; people are spending more than they did a decade ago.

Annual growth in GDP and Household expenditure in the UK



Source: ONS, Datastream 1994-2004

As a result of greater financial security, people have focused more on 'the experience economy' – paying for service and experience rather than material goods. In 1980 services (as opposed to material goods) constituted just 39% of expenditure, in contrast to the current rate of 52%³.

2.3.1 Exploring the effects on demand for outdoor recreation

<p>Opportunities</p>	<ul style="list-style-type: none"> • Increased demand for outdoor recreation is anticipated on account of: <ul style="list-style-type: none"> - Greater financial flexibility to spend on outdoor recreation. - Greater thirst for experience. • There is already a good market understanding for those currently.
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Threats	<ul style="list-style-type: none"> • The social inclusion agenda could be jeopardised as outdoor recreation becomes associated with the well-off. • There may be conflict between different uses of the outdoor environment: those that cost money, e.g. shooting and those that do not, e.g. walking. • ‘Simple pleasures’ may lose their appeal. • There is likely to be a greater threat of competition from abroad as more people can afford to travel. • Greater wealth leads to more home ownership with the financial and time commitments that entails in terms of mortgage repayments and home improvement: <ul style="list-style-type: none"> - This takes money and time away from outdoor recreation
Additional challenges	<ul style="list-style-type: none"> • There is likely to be an increased desire for more diverse and more intense activities. • People are likely to be more selective in their choice of outdoor activities.

2.4 Wellbeing

2.4.1 Greater Drive to Physical Activity

The rise of obesity, heart disease and respiratory problems has made health an increasingly pressing issue for both the Government and individuals in this country.

Promotion of physical activity at the Governmental level currently comes through the Physical Activity Plan, drawing together a range of Government departments and agencies.

In tandem with (and, in part, as a result of) this, there is greater public awareness of the benefits of physical activity. One indicator of this is the rise in both public and private gym membership over the past decade: it rose by a quarter since 2002, climbing 8% during last year alone⁴. Additionally, one in three people successfully changed the amount of exercise that they did in 2004 (1 in 5 tried but failed)⁵. Whilst the intention to be more physically active is not always realised, there is clearly an awareness of its benefits and a will to increase activity levels.

2.4.2 Wellbeing and Retuned to nature

The other side of the wellbeing driver is the emotional effect of outdoor recreation. In a country where 49% of people agree 'The pace of life is too fast for me nowadays' and 52% of people agree 'I'm so tired in the evening I often don't have the energy to do much'⁶, there is a discernable desire for a means of relaxing and recharging.

A connection with nature is seen as an almost instinctive response: the 'Biophilia Hypothesis' maintains that the desire for contact with nature is partly innate.⁷ Moreover, an academic study undertaken by Ulrich highlights the tangible benefits of that connection: he found that a patient with a view of a tree or park from his or her window recovers more quickly than those with a brick wall.⁸

2.4.3 Olympics

On 6th July 2005, it was announced that London would be hosting the Olympics in 2012. Formal sport is beyond the scope of this paper but outdoor recreation is closely allied to the world of sport. Firstly, out of the 26 sports that will be played from August to September 2012, almost all of them have an expression in outdoor recreation, such as athletics (as jogging), cycling, rowing and equestrian activities. Secondly, the broad challenges and vision that sport and outdoor recreation have overlaps: both sport and outdoor recreation share the difficulty of engaging young people in a world of intense media and indoors entertainment:

"We can no longer take it for granted that young people will choose sport [or outdoor recreation]. Some may lack the facilities... Others, in the age of 24-hour entertainment and instant fame, may simply lack the desire."

Seb Coe, Singapore Presentation to the IOC, 6th July 2005

2.4.4 Exploring the effects on demand for outdoor recreation

<p>Opportunities</p>	<ul style="list-style-type: none"> • The Government's efforts to tackle physical inactivity and poor health has raised greater awareness of the need for exercise; people are starting to make health a priority in their lives. • The increased focus on mental wellbeing has made outdoor recreation more important as a means of retreating from the clamour and pace people perceive in their lives. • The Olympics aims to forge a greater connection between younger people and physical activity and is likely to have some success given the international and high profile nature of the Games.
<p>Threats</p>	<ul style="list-style-type: none"> • Coupling outdoor recreation and the health agenda too closely may in the long term jeopardise demand

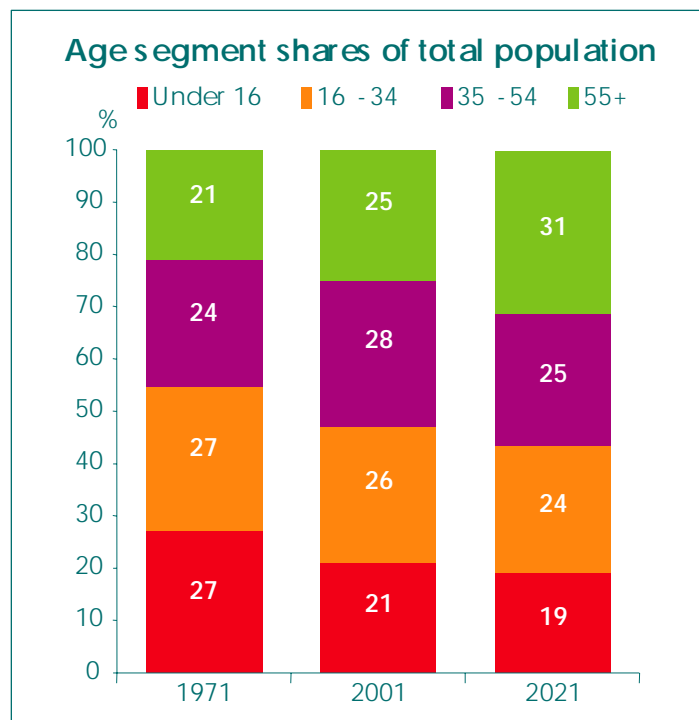
	<p>by encouraging an unhelpfully narrow understanding of outdoor recreation.⁹</p> <ul style="list-style-type: none"> • Concern that the greatest impact will be for those who already participate in outdoor recreation.
Additional challenges	<ul style="list-style-type: none"> • There are some challenges for example in communicating a true and credible picture of the health benefits of outdoor recreation (as seen in Paper 3, 'Health and Outdoor Recreation').

2.5 Reconfiguring age

2.5.1 Ageing population

The UK currently has a population weighted towards the older members of society, with one in four over 55 years of age. This looks set to rise with an estimated 31% over 55 by 2021.

Age segment shares of total population



Source: UK National Statistics, from Social Trends updated Jan 2004

As the older generation grows in size, it becomes a more diverse group in which many are increasingly enjoying activities not traditionally associated with 'someone of their age'. For example, the Sports Council reports more over 50s opting to participate in adventure sports¹⁰.

2.5.2 Changing lifestyles of children and young adults

Children's lives are no longer characterised by traditional outdoor games which older generations associate with youth. The rise of household IT and communications has opened up a world of indoors, sedentary entertainment with one in ten 16 to 18 year olds in the UK spending more than 20 hours a week online¹¹.

As a result, there is a significant 'disconnect' between young adults and both the countryside and outdoors recreation.

2.5.3 Exploring the effects on demand for outdoor recreation

<p>Opportunities</p>	<ul style="list-style-type: none"> • There is likely to be increased participation in outdoor recreation amongst older people, with a greater number of retired people with leisure time on their hands. • Recognition of the changing lifestyles of children and young adults has prompted a sea change, with studies of the environment appearing more prominently in primary school curricula and Physical Education receiving significant investment in schools¹². - The new generation is unlikely to be as disadvantaged in their ability to engage with and appreciate outdoor recreation as the one currently reaching adulthood.
<p>Threats</p>	<ul style="list-style-type: none"> • Connection with the younger generation is jeopardised as the focus is weighted towards the older generation. • Greater participation of teenagers could lead to more conflict between user groups and the demonisation of young people. - Typically the younger generation engages in high adrenaline activities such as mountain biking, jet-skiing and quad biking. An increase in this user group may antagonise those that have sought calm and relaxation in the countryside.
<p>Additional challenges</p>	<ul style="list-style-type: none"> • There is likely to be a demand for greater diversity of activities for the older generations who are increasingly less willing to be stereotyped. • There is the question of how to tackle unmanaged activity for young people.

2.6 Increased availability of information

“People need information to find their way around the countryside. It can motivate, educate and encourage people to visit new places.”

Countryside Recreation: Enjoying the living countryside, Countryside Commission, 1999

It is not only the availability but also the readability and clarity of information provided that is a significant driver. An example of this is the step by step guides to circular routes that were used to promote some of the Countryside Stewardship Scheme’s new routes of permissive access.¹³

Information is also critical for disabled users. For those with a physical disability, a level of detail is required to let users know where stiles or equivalent barriers lie. For those visually impaired, it is the format that becomes significant such as the availability of large print or audio cassette information.

2.6.1 Exploring the effects on demand for outdoor recreation

<p>Opportunities</p>	<ul style="list-style-type: none"> • Clear and understandable information is anticipated to increase participation in outdoor recreation by communicating to the public which areas are accessible and what activities are available. • Accurate information allows for a more experimental approach to recreation by inspiring confidence and empowering consumers to try new activities. • Information additionally serves to educate people about dangers and so defuse the effect of the risk averse society which dissuades people from participating.
<p>Threats</p>	<ul style="list-style-type: none"> • There is the possibility that, in the effort to provide accurate information, an excess of detail is provided which intimidates or frustrates non-users who might otherwise have considered outdoor recreation. • Too much detail and information may confuse people and make it more difficult for them to make choices about how to spend their leisure time.
<p>Additional challenges</p>	<ul style="list-style-type: none"> • An awareness of the number of different formats required for different user groups.

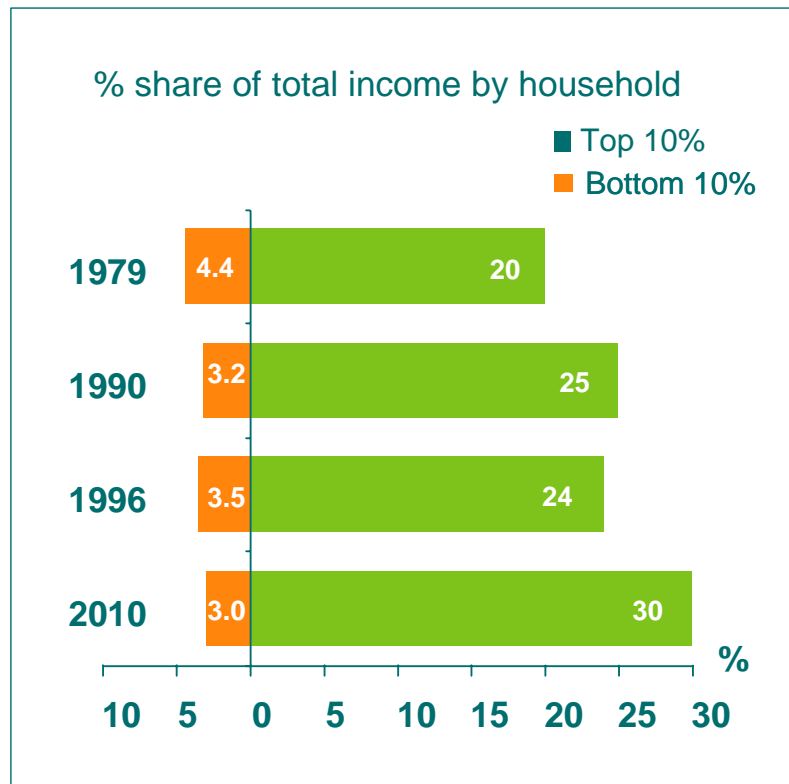
2.7 Social inclusion

2.7.1 Polarisation of income

There is an increasing polarisation of income in this country: in 1979 the wealthiest 10% in society owned 20% of the country’s wealth with the bottom

10% owning 4.4%; by 2010 the balance is predicted to be a more unequal 30% to 3% split.¹⁴

Disparity in UK household incomes



Source: ONS "Households below Average Income" 2000/01

These growing disparities in wealth are echoed by growing disparities in behaviour, including participation of outdoor recreation: 55% of ABC1s have taken a leisure trip in the past 2 weeks, compared with 44% of C2Des (see appendix: Glossary for definitions).¹⁵

2.7.2 Ethnic diversity

The UK is a multicultural nation with 8.7% of the overall population and 28.8% of Londoners belonging to an ethnic minority.¹⁶ However, these percentages are not reflected in participation for outdoor recreation. This is particularly true in the countryside where studies have revealed that ethnic minorities expect to feel 'excluded and conspicuous in what is perceived as an exclusively English environment'.¹⁷

There is, however, political will to tackle these disparities:

"By 2005, we will carry out a full diversity review of how we can encourage... more people from ethnic minorities, from the inner cities... to visit the countryside and participate in country activities."

Rural White Paper, DEFRA, November 2000

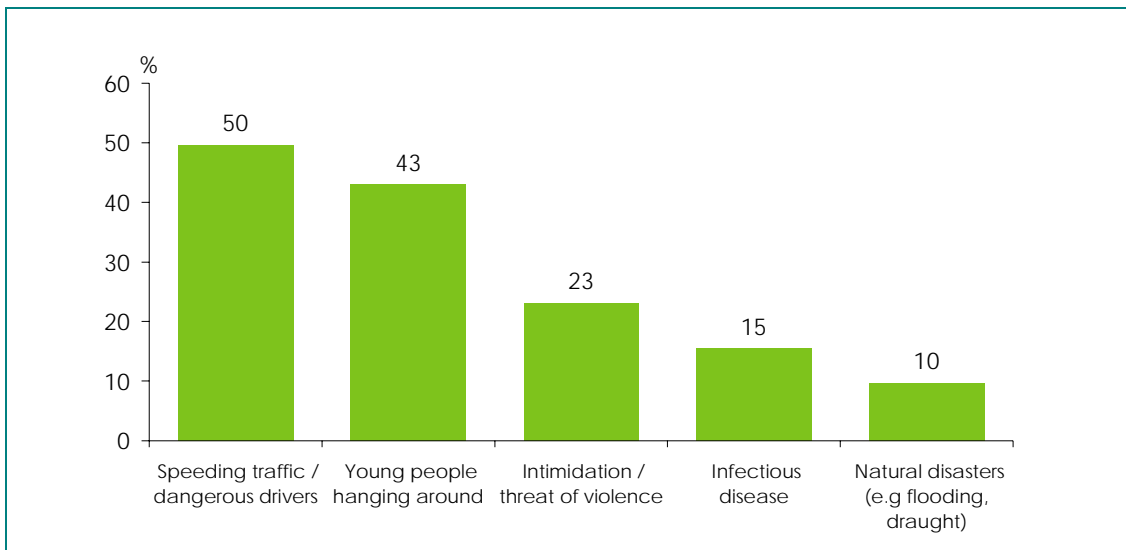
2.7.3 Exploring the effects on demand for outdoor recreation

<p>Opportunities</p>	<ul style="list-style-type: none"> • The successful execution of the Government’s diversity agenda will lead to a greater range of income groups and ethnic groups using the outdoors. • If social inclusion is achieved, it will lead to more diverse and culturally rich use of the countryside and city parks.
<p>Threats</p>	<ul style="list-style-type: none"> • If this agenda is not pursued sensitively, there is the risk that groups who have no experience of the outdoors may act in a way which antagonises land managers, thereby impeding the progression of social inclusion in the long term. • A greater variety of user groups may lead to greater conflicts with landowners. • The social inclusion agenda may just remain as an issue that is never fully resolved: <ul style="list-style-type: none"> - Organised trips for specific groups may continue to be arranged but outdoor recreation is never embedded in the lives of ethnic minorities or low income groups; they do not develop a feeling of self sufficiency in the outdoors.
<p>Additional challenges</p>	<ul style="list-style-type: none"> • If successful in achieving social inclusion aims, the local rural populations will need guidance as to how to adapt to new user groups from cultures that they have little or no experience of

2.8 Risk averse society

People perceive a wide range of risks in their lives and outdoor recreation presents a number of specific risks to participants. These include speeding traffic (with 60% more fatalities on rural roads than urban roads)¹⁸, threat of violence and intimidation (a particular concern for parents when they consider allowing their children to go into the outdoors), criminal activity in parks, injuries that could take place in areas such as abandoned mines and quarries.¹⁹

Percentage agreeing: 'I feel at significant risk from the following:'



Source: Henley Centre, PCC 2004

In addition, for those that have not participated, there are general fears surrounding rural areas as an unknown entity which creates a sense of being out of control. This may focus on the fact that mobile phone coverage cannot always be guaranteed in remoter areas or more general feelings about being subject to the elements and being 'alone', divorced from urban life and the comfort of a nearby hospital and police station.

The crucial difficulty underlying this trend is people's incorrect assessment of risk; people sense risks in their lives but are unable to gauge precisely how much of a danger they present. For example, 35% of people feel at significant risk from an attack on their person, compared with just 11% of people who feel the same about a fall in house prices²⁰. In a similar way, there is a suggestion that people's perceived risks for example concerning young people hanging around in parks or the lack of control associated with being in the remote countryside, exert more of a psychological influence than the actual risk they pose would suggest.

2.8.1 Exploring the effects on demand for outdoor recreation

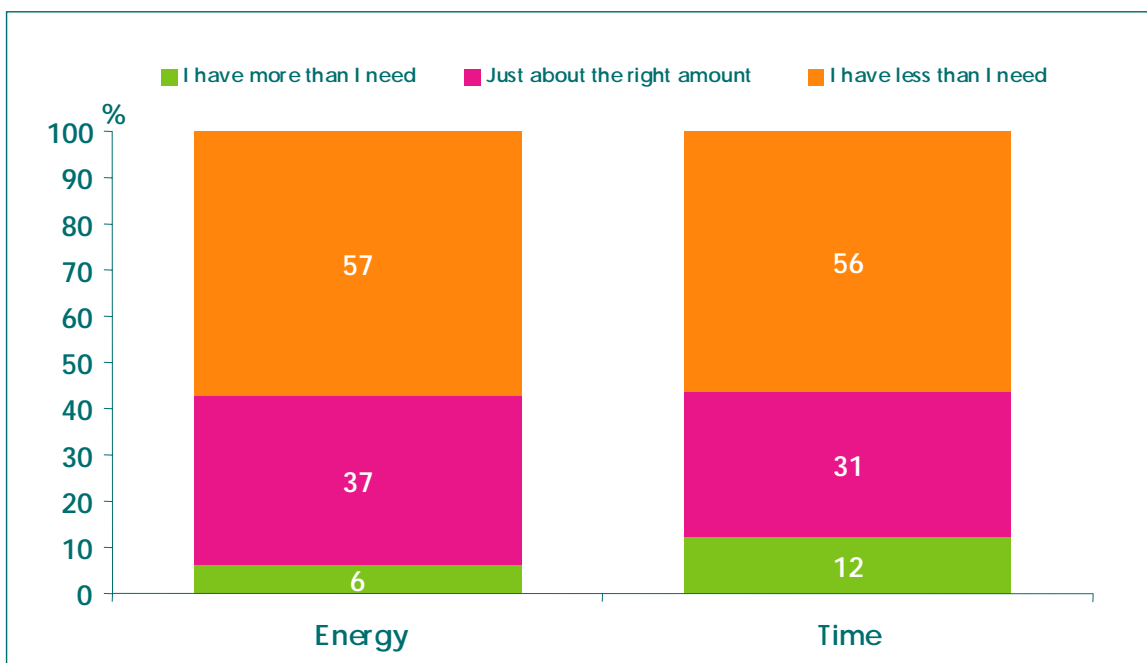
<p>Opportunities</p>	<ul style="list-style-type: none"> • The general trend towards a risk averse society may make people more sensitive to the health risks associated with physical inactivity: <ul style="list-style-type: none"> - As a result demand for outdoor recreation would be likely to increase as a means of avoiding those health risks.
<p>Threats</p>	<ul style="list-style-type: none"> • Demand is suppressed by this driver as people are put off recreating outdoors on account of real or perceived risks. <ul style="list-style-type: none"> - This effect is most prominent for parents with children.

<p>Additional challenges</p>	<ul style="list-style-type: none"> • There has been a proliferation of Health & Safety regulations and the push for more regulated forms of outdoor recreation: <ul style="list-style-type: none"> - Formality seems to provide a sense of security for many participants or parents of participants. - Feelings of risk are multiple and differ from one individual to the next: - Addressing the negative effects of the risk averse society will require a subtle and varied approach. • Much of the risk averse society is based on perceived risk rather than actual risk: <ul style="list-style-type: none"> - Changing people's attitudes and psychology in relation to risk is more important than altering the level of risk in itself.
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2.9 Convenience culture

People perceive insufficient energy levels and considerable time pressure in their lives:

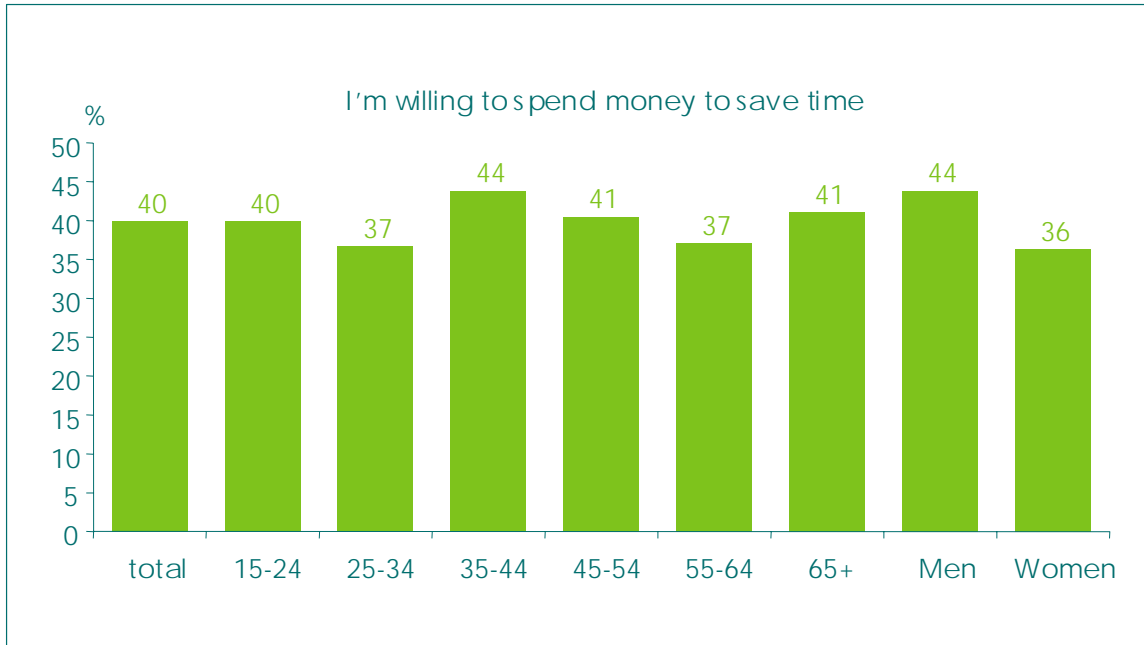
Percentage indicating their response to the question: 'How much of the following resources do you feel you have in your life?'



Source: Henley Centre, PCC 2004

Time has accordingly become a more precious commodity with a growing number of people prepared to pay for it: 40% of people agree 'I am willing to spend money to save time'.²¹

Percentage agreeing: 'I am willing to spend money to save time'



Source: Henley Centre, PCC 2004

As a means of conserving time, people increasingly choose the most convenient option available to them. The rise of 24 hour supermarkets (as much as 600% growth for 24 hour Tesco stores between 2002 and 2003)²², online shopping, 'ready meals' and the outsourcing of domestic chores (such as cleaning) are indicative of this trend's growth.

This has an uncertain effect on demand for outdoor recreation.

2.9.1 Exploring the effects on demand for outdoor recreation

<p>Opportunities</p>	<ul style="list-style-type: none"> • Demand for outdoor recreation could increase for those that perceive it as a flexible means of exercising, as it fits any timescale. • People are developing a mindset of trying to fit a variety of different activities into their day: <ul style="list-style-type: none"> - This may make them more open to incorporating outdoor recreation into their routine.
<p>Threats</p>	<ul style="list-style-type: none"> • Demand for outdoor recreation could equally decrease for those who view the business-like running of the gym as a more convenient means of gaining exercise. • Outdoor recreation becomes devalued as something

	that can be slotted into 10 minutes, but does not constitute a significant part of people's lives.
Additional challenges	<ul style="list-style-type: none"> • The crucial tension of this trend pivots on how convenient people perceive outdoor recreation to be; the onus on good marketing is consequently raised.

2.10 Summary of prioritised drivers

These prioritised drivers have identified the high level factors affecting demand such as economic stability (increasingly affluent society), demographic change (ageing) and political priorities (social inclusion). Moreover, they look at people's attitudes at a more individual level, such as people's perception of risk, their feelings of a time and energy deficit and their increasing focus on personal wellbeing. As a whole, they indicate the socio-economic trends that will have the greatest influence on the future of outdoor recreation.

3. Barriers

3.1 Introduction

As a means of identifying what suppresses demand, the desk research and workshops identified a number of barriers to engagement in outdoor recreation, including links to some of the prioritised drivers discussed above. These include the 'risk averse society' that, for example, holds parents back from allowing their children to cycle on dangerous country roads and the lack of information which acts as a disincentive for those who may be lacking in confidence when it comes to visiting a new area or trying a new activity.

In addition, there are specific barriers to user groups such as ethnic minorities. The perception of overtly traditional English values and close-knit communities in the countryside, fuel fears of discrimination²³. This is combined with a lack of culturally-appropriate provisions such as areas for prayer or halal or kosher food.

However, to unlock the barriers further, three focus groups were carried out in August 2005.

Participants selected were filtered for being low or non users of outdoor recreation and came from a cross section of society. They were arranged into three age groups: young adults (between 17 and 21 years), young families (those with children between four and eleven years old) and seniors (over 55 years). All participants filled out an in-depth pre-task questionnaire, followed by discussing the issues in a two hour focus group, allowing the barriers to be explored in depth.

3.2 Time pressure

Time pressure is a key challenge of modern living; it is not only part of the convenience culture (as discussed in this paper) but also a significant barrier to outdoor recreation, across the lifestages.

*"Planning takes time that I simply haven't got"*²⁴

Outdoor recreation is difficult to schedule into the newly established working and socialising patterns of **young adults**.

"It's impossible to do anything new. You get stuck in a rut but at least it's easy"

For **young families**, the situation becomes more complicated; coordinating three, four or five people is a much more difficult task than coordinating one. For dual, low income families, shift-work is arranged so that one parent is free to look after the children while the other works.

"It's like a relay race, both of us juggling work shifts and ferrying the children to and from school and work"

As a result, the opportunity for outdoor recreation involving the whole family is very rare and the importance of choosing 'the right day out' becomes a more important decision to make.

"Family time is really precious. The children grow up so fast and I want to make the most of the time we have"

Even for families who do not do shift work, competing demands on the time of individual members of the family (whether it be music lessons for the son on Saturday or football for the father on Sunday), means that there is simply very little time for the family to engage in outdoor recreation together.

"I feel I have no time and certainly no time for me"

Seniors are also sensitive to the pressures of time, their priorities, commitments and routine having changed in their older years. Often, the focus on grandchildren comes first, squeezing out time for planning outdoor recreation.

"I drop everything for my family. That takes up most of my time"

Others are simply content with their existing life patterns and resistant to changing them:

"You don't understand: I'm happy with the way my life runs"

The crucial factor emerging from this actual and perceived time pressure is that people feel the need to prioritise the activities in their life to make the most of the time available to them. Clearly, outdoor recreation is low down on the priority list. The barrier is therefore not just about a sense of lack of time about how people prioritise their time.

3.3 Lack of appeal

A lack of appreciation for what outdoor recreation has to offer acts as a major barrier to participation.

The majority of **young adults** that participated in the focus groups exemplified the experience economy with the majority having skied or done a bungee jump. In comparison, outdoor recreation is not seen to offer much of an experience.

"I need to find the stuff I do stimulating"

This, combined with a general sense that the outdoors is not set up for young people, highlights the dearth of pull factors to engagement.

"The countryside isn't set up for young people. They want excitement or buzz."

Seniors also perceive a lack of significant draws to outdoor recreation. Participants said that they spent their leisure time pursuing goal orientated pursuits such as salsa dancing or computer courses. They did not see outdoor recreation offering the same element of challenge, nor sense of reward.

3.4 Logistics

The convenience culture is driven by the desire to simplify life and avoid complication wherever possible. There is, however, the perception that the logistics of outdoor recreation run counter to this, with people focusing on the hassle rather than enjoyment of the outdoors.

For **young adults** there is the diffusion of responsibility; someone has to take the lead but more often than not it is too much effort for one individual to look at transport, activities on offer and weather forecasts. When outdoor recreation competes with easier alternatives, the shopping centre, television or play station invariably wins out.

"We have so many things available at the touch of a button that there's no need to go outside"

"TV, DVD, internet, PS2...that's all before I've even left my bedroom"

"You get fresh air walking to the shops"

For **young families** the logistics are also a crucial barrier. With time and energy at a premium, the mammoth planning of where to go, when to go and how to get there looms large in parents' minds.

"I find it takes a lot time and energy to work out where to go and what to do"

Moreover, the perceived lottery of children friendly facilities, adequate parking and toilets acts as an additional disincentive.

"I'm not sure there will be everything I need for the children (and my mum)"

Closer, 'tried and tested' alternatives are often more appealing:

"It's a lot easier to stick to formulas that you know everyone knows and likes"

Organisation and transport arrangements were not such an overwhelming barrier for **seniors**. However, on reaching the outdoors area, there is the concern that practical expectations will not be met; clean toilets, food, adequate parking and a friendly welcome are not seen to be guaranteed.

"It's important that we're made to feel welcome"

"You expect at this age to be treated with a bit of respect"

"It's one of the biggest put-offs when you go somewhere and the toilets are a mess"

3.5 Perceived cost

Young families are particularly sensitive to the cumulative cost of outdoor recreation including travel, food and potential admission costs.

"When you have to multiply everything by four, then the cost soon adds up"

Lying behind this is the sense that enjoyable and engaging recreation incurs a cost (such as visiting gardens, hiring a boat).

"Souvenirs, ice creams, snacks...Kids expect stuff from a day out"

Similarly, **young adults** feel that any outdoor recreation worth doing costs too much, whether through equipment, coaching or admission.

"All the interesting stuff costs money"

Seniors also assumed that there would be a significant cost in outdoor recreation and are particularly value conscious:

"Value for money is very important and more often than not you don't get it!"

"I haven't got money to fritter away on something I don't enjoy"

However, thinking practically about money-saving options, such as train discounts and being able to bring your own food to the outdoors, the assumed cost is much greater than the reality.

3.6 Image

Many **young adults** do not identify with the outdoors environment, with some going as far as having a distinct distaste for it. The reasons for this seem to lie in the image of outdoor recreation being outdated, a world reserved for those with 'anoraks and beards'.

"It's for grandads and geography teachers..."

"Who can you name who's cool and is an outdoors person?"

Moreover, many have negative associations such as unpleasant smells, bad British weather, a lot of mud and getting lost. A probable reason for this lack of

connection with the outdoors is minimal exposure when younger (many of the participants had few experiences to draw from).

Image is also a crucial issue for **young families**. Children's wishes for how leisure time is spent tend to focus on locations with the greatest prestige attached to them.

"Looking cool in front of their mates is important"

"Legoland has become the trophy destination for kids of their age"

More often than not, this is a new theme park rather than the timeless landscape of their local wetland or forest. Given 'pester power' is currently an extremely strong force in family decision-making, the lack of kudos a trip to the countryside has acts as a barrier to greater participation.

"If the children decide they don't like something, we've had it"

"The last thing you want: you get somewhere and the kids start moaning"

For **seniors**, emotionally loaded memories associated with the countryside act as barriers. For example, an area of the countryside that someone used to go to with a loved one who has since died or old mining land where most of a community worked until the upheaval of its closure serve as painful associations that put people off re-visiting these areas.

"It's strange but you do find yourself avoiding certain places because of the way they'll make you feel"

Moreover, perceptions of risk act as an additional disincentive:

"You hear so many stories about this and that that you don't know how safe things really are"

4. Uncertain outcomes

4.1 Introduction

The prioritised drivers that emerged from the workshops undertaken in July 2005 and that have been discussed in this paper have been mapped on to each other together with additional drivers to identify the links that exist between them (see Paper 1, 'Background and introduction to research').

It should be noted that the 'importance' and 'openness to influence' of each driver has been assessed within the context of the 'demand' 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

High importance	Increasingly affluent society		Returned to nature Drive to greater activity and health Experience economy Changing lifestyles of children and young people
Medium Importance	Olympics 2012 Urbanisation of culture Ethnic diversity Household IT and communications	Wellbeing Convenience culture Declining health outcomes	Priorities in public spending Social inclusion Agelessness
Low importance	Changing household set-up	Risk averse society Availability of information	
	Low influence	Some potential to influence	Significant potential to influence

Source: Henley Centre, 2005

4.2 Drivers over which there are few levers of influence

What this analysis tells us is that **increasingly affluent society** is very important to the future of demand for outdoor recreation. However, it is an issue over which there appears to be very little scope to significantly influence.

The challenge with this driver is to calculate a response which accepts that it will be an important influence on the future of demand for outdoor recreation and takes it into account in future strategy.

4.3 Secondary influences

The place of **availability of information** and **risk averse society** represents drivers that are of less importance in terms of their impact on the other factors, and their overall impact on outdoor recreation. For example, **availability of information** is influenced by drivers such as **household IT and communications** but it has little impact on the future direction of the other drivers. These secondary influences typically represent an issue that is influenced by a number of the other key factors in the system (i.e. the matrix), and will change direction according to these factors, but by itself is not a key influence on the overall future of demand for outdoor recreation.

4.4 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 each of the uncertainties and highlights which of the drivers it is influenced by as well as those that it influences. At the end of the commentary around each uncertainty, 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

4.4.1 Retuned to nature

Consumers are responding to the idea of restoring their own and society's balance with nature. This trend partly explains the success of organic food (which rose in value from £100 000 in 1993 to £1 billion in 2003²⁵) as well as the growth in organisations such as the Slow Food Movement²⁶. However, the development or retraction of this trend depends on a significant number of other drivers.

The **drive to physical activity and health** and the focus on **wellbeing** have facilitated greater recognition of the benefits of the outdoors environment. As a result, they have increased the strength of 'retuned to nature'. They have additionally made the future of this trend more uncertain. If the interpretation of wellbeing and health shifts (for example, if drugs, supplements and functional foods become more important than activity levels), 'retuned to nature' will be a much less significant driver.

Similarly, the current direction of the **experience economy** could drive the strength of 'retuned to nature'; the recourse to nature is an experience distinct from the norm of a modern, largely indoors and urban life. However, this driver could equally work to decrease retuning to nature as people increasingly

demand more extreme, adrenaline-fuelled experiences in which the more subtle aspects of the natural world will not always play a part.

The changing lifestyles of children and young people driver also has an influence. The current perception is that the rise of household IT and communications has detracted from young people’s interest in nature; certainly the play station has exerted an influence over a certain stratum of society. At the same time, the current primary school curriculum places an emphasis on ecology and environmental awareness which supports retuning to nature. The way in which these two conflicting directions of the changing lifestyles of children and young people play out will influence the future prominence of retuning to nature.

The **Olympics 2012** is also anticipated to have an effect. Engaging with nature may increase as the Games encourage people to get out and pursue more outdoors activities. However, it may equally detract from experiences with nature as people invest greater time in formal sports (undertaken on a race track, swimming pool or pitch), at the expense of recreation in a natural environment).

Whilst dependent on a number of drivers, ‘retuned to nature’ is also a dominant driver²⁷. Contact with nature has a significant role in health and **wellbeing**; after as little as four minutes among trees a person’s heart rate drops significantly.²⁸ Therefore, if retuning to nature remains strong in 2025, it will buttress the wellbeing trend and help reverse **declining health outcomes**. The opposite is likely to be true if nature occupies a weaker position in society’s consciousness.

<p>Best case outcome</p>	<p>There is a sustained focus on physical activity as a means of achieving health and there is a continued conscious pursuit of wellbeing. This has led to greater outdoor exercise and relaxation in the countryside.</p> <p>The experience economy remains a strong driver, with people seeking experience through connecting with nature. The Olympics also helps to promote the outdoors.</p> <p>Meanwhile, the prevailing culture of children and young people is one of being environment-savvy as well as technology-savvy.</p> <p>The combination of the drivers playing</p>
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	<p>out in this way prompts more interaction with nature, increasing the nation's wellbeing as well as turning the tide on declining health outcomes. The focus on nature additionally increases demand for outdoor recreation.</p>
<p>Worst case outcome</p>	<p>Greater physical activity is usurped by 'health treatments' (bought services such as drugs) as a means of achieving health and wellbeing.</p> <p>The experience economy narrows as a concept, moving towards the 'adrenaline economy' in which nature plays little part. Meanwhile, the Olympic Games merely encourage greater interest in competitive sports rather than for outdoor recreation.</p> <p>With the rise of household IT and communications, any classroom learning about the environment is a sideline in children's lives. Indoors entertainment prevails.</p> <p>As a result of the direction of these drivers, people spend less time connecting with nature; the country's wellbeing and health outcomes suffer accordingly and there is less of an incentive to participate in outdoor recreation.</p>

4.4.2 Drive to greater physical activity and health

There is an increased focus on activity as a preventative measure against heart disease, obesity and depression in Government and in society at large.

However, the development of this trend in future years will depend on **priorities in public policy and spending**. There is currently substantial political weight behind increasing the nation's physical activity levels, spanning community interventions, PE lessons and play areas²⁹. Effective delivery and sustained Government interest in physical activity will be required to keep this driver strong.

Linked to this is **declining public health outcomes**; this currently supports the drive to greater physical activity and health. If health indicators deteriorate,

the prominence of the drive to activity and health would be expected to grow. However, if there is a turnaround in declining public health outcomes, the development of the drive to activity is less certain. It may establish the case for activity in the future but it could equally cause interest in health and physical activity to wane and resources to be redirected to what is perceived as a more pressing area.

The **experience economy** also influences this trend. People seek experience and physical activity supplies it by offering a wide range of experiences from thrill (such as mountain biking) to learning a new skill or technique (such as orienteering). The strength of the experience economy therefore bolsters enthusiasm for physical activity but if the nature of the trend changes substantially over the next twenty years, the drive for physical activity and health is accordingly likely to change.

As has been mentioned above, the drive to greater physical activity and health has an influence over the future direction of the **retuned to nature** driver. It also determines how important **wellbeing** will be with these two trends closely linked:

“Increasing activity...has positive effects on psychological well-being and mental health.”

‘Choosing Health? Choosing Activity’, DCMS, DoH, Spring 2004

If the drive to physical activity and health declines, the logical effect is that the interest in wellbeing will also decline.

<p>Best case outcome</p>	<p>Public health outcomes have improved as a result of the Government’s focus on physical activity and health. This has justified the sustained prioritisation of physical activity on the political agenda.</p> <p>The experience economy continues as a prominent driver, increasing physical activity and health as people experience different forms of exercise in the outdoors.</p> <p>As a consequence of the sustained drive to physical activity and health, the wellbeing of the nation has improved, people spend more time retuning to nature and there is greater demand for outdoor recreation.</p>
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<p>Worst case outcome</p>	<p>Physical activity, health and wellbeing are usurped by other Government priorities such as education or drive to improve IT skills, resulting in the continued decline of public health outcomes.</p> <p>People are spending greater time and effort in pursuit of material goods rather than experience and are consequently both less physically active and less likely to spend time outdoors.</p> <p>People therefore have less opportunity and desire to retune to nature, resulting in a decline in the nation's wellbeing and a drop in demand for outdoor recreation.</p>
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4.4.3 Experience economy

The experience economy is one where people no longer focus so much on material possessions but on the experiences they are able to have in their lives.

The driver is dependent on an **increasingly affluent society** in which most people enjoy financial stability and possession of necessary material goods. If this trend is sustained, people are likely to continue to have the luxury of looking beyond materialism to what experiences their wealth can provide. If, on the other hand, there is an increasingly less affluent society, people are likely to shift their attention from experience back to basic goods and ensuring material comfort.

The UK's **ageing population** also affects how the experience economy develops. With currently one in four UK citizens over 50, and an estimated 31% by 2021³⁰, there is a much larger, more diverse group of older people. Many of this group are increasingly open to new experiences; 28% of 45 to 65 year olds agree 'I like to pursue a life of challenge, novelty and change'³¹ which will propel the experience culture. Together, the continuation of an ageing population and an increasingly affluent society (where older people have adequate pensions to spend on recreation) act as powerful drivers to the experience economy.

The experience economy has already been seen to influence **retuned to nature** but it also affects the **risk averse society**. If there is increasing focus on experience, the strength of the risk averse society driver may be diluted. Indeed, if the experience economy expands significantly, thrill-seeking may go as far as to overpower fears when it comes to engaging in outdoor recreation.

It is also likely that the experience economy encourage people to embrace the entirety of any outdoors experience by taking responsibility for their own safety. However, if the experience economy declines there will be fewer people taking part in high adrenaline activities and those that do will approach such experiences cautiously (abdicating their sense of risk to organisers of these activities rather than taking responsibility themselves).

<p>Best case outcome</p>	<p>The affluence of the UK population and the ageing population continue to grow.</p> <p>This fuels the experience economy which matures to encompass both subtle and more extreme experiences. As a result there is more widespread appreciation of both connecting with nature and high adrenaline activities.</p> <p>The interest in thrilling experiences makes people less risk averse, removing a significant barrier to outdoor recreation.</p>
<p>Worst case outcome</p>	<p>The UK population becomes increasingly less affluent and the ageing population increasingly have the same world view.</p> <p>This causes a decline in the experience economy with the effect that retuning to nature becomes less important.</p> <p>Moreover, a lack of interest in high-thrill activities spurs the risk averse society and encourages the small number of people that do take part in thrill-seeking recreation to devolve responsibility for safety to organisers.</p> <p>Overall there are fewer people inclined to participate in outdoor recreation and those engaging in high-adrenaline activities will place increasing responsibility onto providers of outdoor recreation.</p>

4.4.4 Changing lifestyles of children and young people

Children's attitudes and patterns of behaviour have changed significantly over the last two decades.

This driver is determined by the **urbanisation of culture**. There are a number of physical aspects to this: greater pollution of air, light and noise as well as limited space in urban environments have created 'a big gap in equality of access to high quality natural environments between children from rural backgrounds and children from urban backgrounds'³². This in turn has created an 'urban mentality' that contributes to the changing patterns of behaviour of children and young people; it has made children less inclined to spend time outdoors and more inclined to seek entertainment indoors.

The rise of **household IT and communications** has propelled the urbanisation of culture by facilitating indoors entertainment and so changing children's lifestyles.

As has been discussed before, the changing lifestyles of children and young people will affect the progression of the **retuned to nature** driver. How young people's lifestyles change will also determine the progress of the **drive to greater activity and health**. If there is no impulse to be active from the younger, potentially most 'able-to-be-active' sector of society, the long term affect on the nation's physical activity levels and public health could be detrimental.

<p>Best case outcome</p>	<p>Culture moves away from its 'urban', indoors, inactive direction, with a greater interest developing in the rural and outside world.</p> <p>Household IT and communications are used predominantly for carrying out tasks such as doing homework rather than functioning as the main source of entertainment. As a result, children's entertainment is associated more with the outdoors.</p> <p>The effect of this is young people being healthier, more active and connecting more with nature. The means through which they do this is outdoor recreation.</p>
<p>Worst case outcome</p>	<p>Urbanisation of culture continues to grow in strength as a driver, with an increasing disinterest in the outdoors</p>

	<p>and the countryside that sits just outside suburbia.</p> <p>The proliferation of household IT and communications makes young people self-sufficient in their homes; they are able to both fulfil basic tasks (such as filling out forms online) as well as entertain themselves through digital television and the play station.</p> <p>As a result there is no interest in retuning to nature and minimal incentive to greater activity. The younger generation is consequently less healthy and significantly less inclined to engage with outdoor recreation.</p>
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4.5 Explanation

These four most unpredictable drivers highlight how divergent future outcomes may be for the demand for outdoor recreation. The most positive arrangement of these drivers is a strong impulse towards retuned to nature, the sustained drive for physical activity and health, the continuation and maturation of the experience economy and children's lifestyles driven by the environmental and not just the urban and technological.

However, the complex relationships these four have to other drivers of demand are crucially important in directing and influencing them. It is therefore important to address factors such as an increasingly affluent society and urbanisation when considering the key uncertainties surrounding the future of outdoor recreation.

5. Critical Issues

Based on the combined output of the research discussed in this paper, the following bullet points identify the issues which Henley Centre suggest Natural England needs to consider in the development of the strategy for outdoor recreation:

5.1 How can nature and physical activity be linked more closely?

Two crucial drivers discussed in this paper have been returned to nature and drive to physical activity and health; both have been identified as unpredictable and both have a strong influence over each other. However, engaging with nature is not always associated with being physically active. It is either the outdoors (nature) or the recreation (physical activity) which is stressed, yet when combined they have a potentially very powerful appeal.

- How can both the physical and connection with the natural world be further promoted as one package?³³
- What scope is there to enhance the importance of retuning to nature, so as to avoid the 'all eggs in one basket' concern surrounding positioning outdoor recreation within the Government's Physical Activity Plan?

5.2 How can the 'value of recreation' be marketed in the convenience culture?

Given the increasingly felt time and energy famine, cited across the lifestages, the importance of convenience is paramount. Alongside gyms, self-check-out desks at supermarkets and self-check-in machines at airports, outdoor recreation is currently perceived as more of a time-consuming exercise than a pleasant, convenient part of life. In part this is because outdoor recreation is seen as something outside of the daily routine and something that requires planning:

- How can spontaneous outdoor recreation be encouraged?
- How can outdoor recreation be easily incorporated in to current working and socialising patterns?
- Could Natural England engage in discussion with key UK employers to encourage policies that introduce an element of outdoor recreation into people's lives? For example, could Tesco's be persuaded to provide green eating spaces at all stores as policy?
- What opportunities are there to offer 'packaged' experiences of outdoor recreation?
- Can outdoor recreation be marketed as an activity that plugs people's feeling of 'energy deficit'?

5.3 What scope is there for outdoor recreation in an 'experience non-economy'?

(A non experience economy is one where people seek experience which they do not pay for.)

A key concern emerging from this paper is outdoor recreation being increasingly associated with wealth. This acts as a rein on demand as perceived cost emerged as a significant barrier to demand and the threat identified in the increasingly affluent society driver was that outdoor recreation would be seen as an elitist pursuit. However, the experience economy could reach a mature level of 'beyond money', in which people seek 'anti-luxury, something that's gone beyond luxury, for those who've had all of the traditionally luxurious experiences.'³⁴ In such a culture, there could be opportunities for increasing demand for recreation.

- What specific simple pleasures can outdoor recreation offer in an 'experience non-economy' culture?
- Can outdoor recreation guide the experience economy towards a search for experience that does not require money?

5.4 How can outdoor recreation move beyond its traditional image?

Across the age groups, the perception of outdoor recreation as a dated activity suppresses demand. It leads young adults to view it as a less socially attractive option; children in young families to guide parents in the direction of more modern theme parks and attractions and older generations to turn to activities that appear more modish. Therefore, if this passé image were changed, there is the potential for much greater demand for outdoor recreation.

- Are there respected figures either in communities or known nationally that can give a more mainstream feel to outdoor recreation?
- What is 'modern' about outdoor recreation?
- How can the more 'modern' aspects of outdoor recreation be communicated to the public more effectively?
- Is the term 'outdoor recreation' outdated?

5.5 What other channels can be used as a lever for engagement?

One of the threats identified for increasing information was intimidating or antagonising people with an excess of information that they are unable to make sense of. However, this causes a tension with the clear need for people to be informed as to what is on offer, how to do it and how to get to a particular place of outdoor recreation. One means of addressing this issue may

be altering the channels through which information is distributed and the areas it is displayed in.

- How can information about outdoor recreation activities have a greater presence in a wider variety of venues where communities get together?
- (This could span from local cafes / Starbucks to mosques and schools to local celebrations and festivals?)
- Is there an opportunity for local information networks between landowners, organisations and the public?
- Given the rise of household IT and communications, what scope might there be for texting short, sharp details of activities or opportunities for outdoor recreation?

5.6 Are the teenagers and young people of today a lost cohort?

The health and habits of children and young adults have changed significantly in recent decades. Their lifestyles have been described in the reconfiguring age driver as more urban, indoors-focused and sedentary, with the focus groups further reflecting this trend. Given that it is experiences in youth that shape behaviour in later years, there may be limited success in trying to engage a group that have been largely disaffected and unconnected from outdoor recreation for most of their upbringing and education.

- Should they be forgotten to allow for greater success with the next generation?
- Is it more worthwhile to focus on the under 10s who have greater environmental awareness (due to changes in the curriculum and the benefit of recent schemes such as Green Start)?
- What are the dangers of not targeting a cohort – are you in effect creating disaffection?

5.7 Final words

These critical issues have addressed some of the central themes of this study. They focus on the current societal trends that shape people's attitudes and behaviour, the reasons for their aversion to outdoor activities and the potential reasons why they would want to engage in outdoor activity.

The questions raised concern how outdoor recreation can appear a convenient part of someone's lifestyle, in touch with modern life and 'socially acceptable' across the age groups. They focus on the importance of communication in a variety of venues and through a variety of channels. Another critical issue raised is how being physically active and surrounding oneself with the natural world can be understood as one, compelling experience. There are also key questions surrounding how that experience can be communicated – whether it is possible to reach the seemingly lost cohort of

teenagers. Moreover these issue question how outdoor recreation can be understood as cost free – natural fulfilment that exists outside of the formal economy, for individuals across all income boundaries.

¹ Report of the 2002-3 Great Britain Day Visits Survey, May 2004. The ethnic and cultural bias is particularly prominent for seaside and coastal trips (where 2% of visits are from non-white ethnic groups) and countryside trips (where 1% of visits are from those groups), despite the fact that those defined as 'non-white' constitute over 8% of the UK population.

² Henley Centre, Economic Forecast, July 2005

³ Henley Centre, Economic Forecast, July 2005, ONS

⁴ Financial Times, July 19, 2005

⁵ Henley Centre, PCC 2004

⁶ Henley Centre, PCC 2004

⁷ A Countryside for Health and Wellbeing: The physical and mental health benefits of green exercise, J. Pretty, M. Peacock, et al

⁸ View through a Window May Influence Recovery from Surgery, RS Ulrich, Science 224, pp420-21, 1984

⁹ 'Culture' faces a similar quandary, as set out by Tessa Jowell in 'Government and the Value of Culture', DCMS, 2004: 'Too often politicians have been forced to debate culture in terms of its instrumental benefits to other agendas – education, the reduction of crime, improvements in wellbeing – explaining – or in some instances apologising for – our investment in culture only in terms of something else.'

¹⁰ UK Sports Council 2001

¹¹ Forrester, European Technographics, November 2004

¹² Department of Culture Media and Sports pledges 2004

¹³ RDS News, DEFRA, edition 13, December 2004

¹⁴ Office of National Statistics "Households Below Average Income" 2000/01

¹⁵ The split in population for ABC1 : C2DE is 51 : 47; Report of the 2002-3 Great Britain Day Visits Survey, May 2004

¹⁶ Office of National Statistics, Region in Figures, Census 2001

¹⁷ ETHNOS Report, Countryside Agency

¹⁸ Department for Transport, Accidents and accident rates: by road class and severity, 2003

¹⁹ Henley Centre, PCC 2004

²⁰ Henley Centre, PCC 2004

²¹ Henley Centre, PCC 2004

²² Company Report 2004, as reported by the BBC

²³ ETHNOS Report, Countryside Agency

²⁴ All comments quoted in this section come from Henley Centre HeadlightVision focus groups, August 2005

²⁵ Soil Association, 2003

²⁶ Slow Food Movement UK, 2004. Whilst still a very small group, its membership has shot up dramatically over the last five years, increasing more than tenfold since 1998.

²⁷ It influences a number of other drivers.

²⁸ Ulrich et al 1991, quoted in Therapi Project, REACT Outputs and Achievements 2003/4

²⁹ Delivering Choosing Health, Department of Health, March 2005

³⁰ Office of National Statistics, Social Trends, January 2004

³¹ BMRB, Target Group Index, 2004

³² 'A child's place: why environment matters to children', DEMOS and Green Alliance, May 2004

³³ The Green Gym is a good example of an initiative making the overt link between these two issues. However, it is notable in its rarity. How can variations on this theme be progressed to appeal to a wider section of the population?

³⁴ Anthony Lassman, publisher Nota Bene Travel Guides, 2004