



HenleyCentreHeadlightVision

## **Appendix A: Mapping the impact of outdoor recreation**

A report for Natural England's  
outdoor recreation strategy



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# 1 The significant themes

## 1.1 Introduction

The seven underlying themes specified in the first paper, 'Impact of outdoor recreation' are as follows:

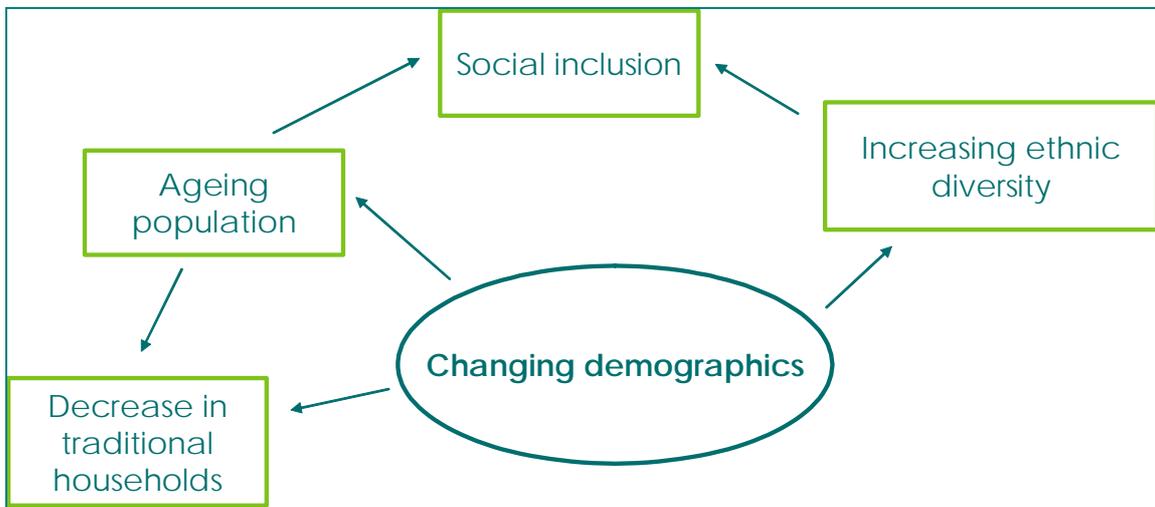
- Changing demographics
- Increasing affluence
- Greater awareness of environmental concerns
- Declining health outcomes
- Falling costs of ICT (information and communication technologies)
- Unequal regional economic development, and
- Decline in public trust

Each of these underlying themes was 'mapped' (see Appendix A: Research background and objectives for explanation of this process) onto the overall set of drivers of change identified for the project as a whole. This was done in order to assess whether they were primary drivers (those that have an influence on other drivers), secondary drivers (trends emerging from primary drivers) or tertiary drivers (or outcomes that emerge from either primary or secondary drivers).

In the following diagrams some of the drivers are found on more than one map. This means they are points of instability and are particularly important. For this reason these trends are explored in more detail.

## 1.2 Changing demographics

### Map of drivers for Changing Demographics

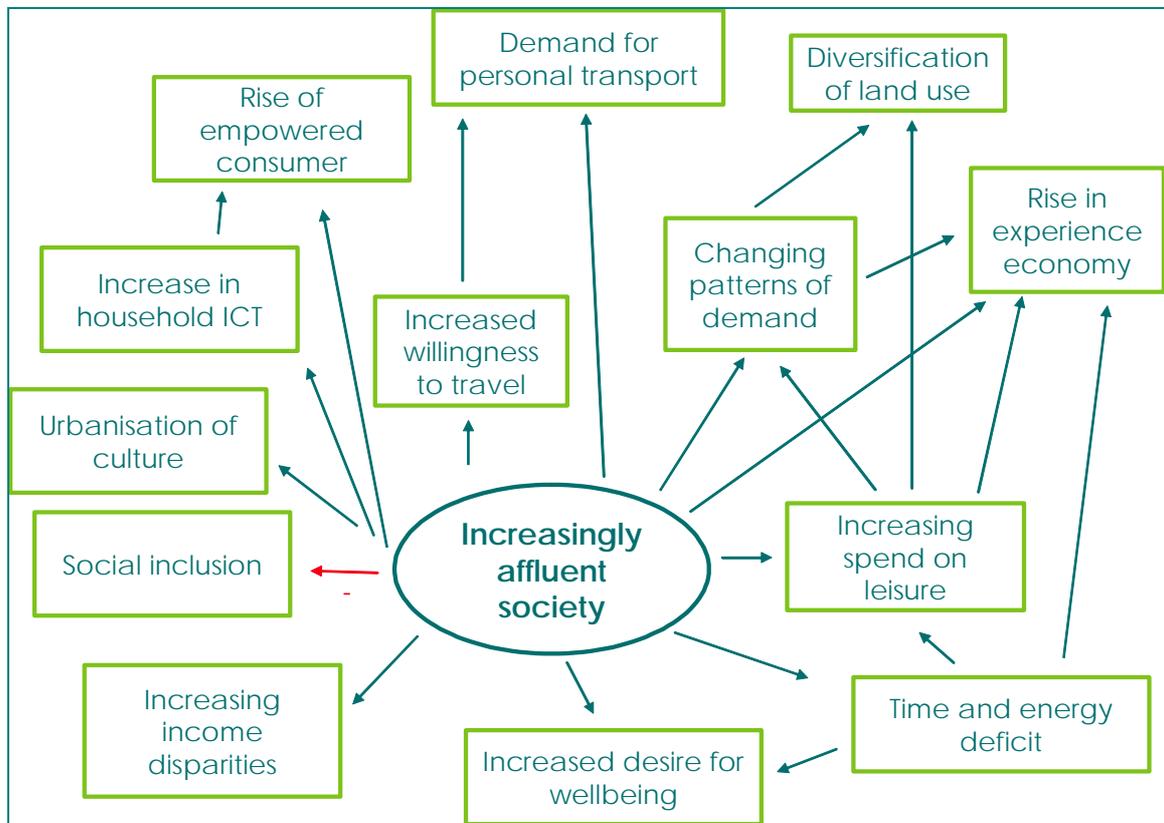


Source: Henley Centre Headlight Vision

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

## 1.3 Increasing affluence

### Map of drivers for Increasing Affluence



Source: Henley Centre Headlight Vision

The drivers which flow from increasing affluence tell a number of different stories. Some are connected, some conflict.

In terms of outdoor recreation, the strongest cluster of drivers is around the increasing spend on leisure. The rationale for this is as follows: as individuals become more affluent, the proportion of income spent on services compared to goods increases, and the proportion spent on leisure rather than on utilities also increases. As can be seen from the map, this leads to demand for experiences ('the experience economy') and also to greater supply, seen in the 'diversification of land use' away from agriculture. This effect is reinforced by a knot of counter trends: the pressures of affluence lead to a shortage of time and energy, and also to a greater desire for well being.

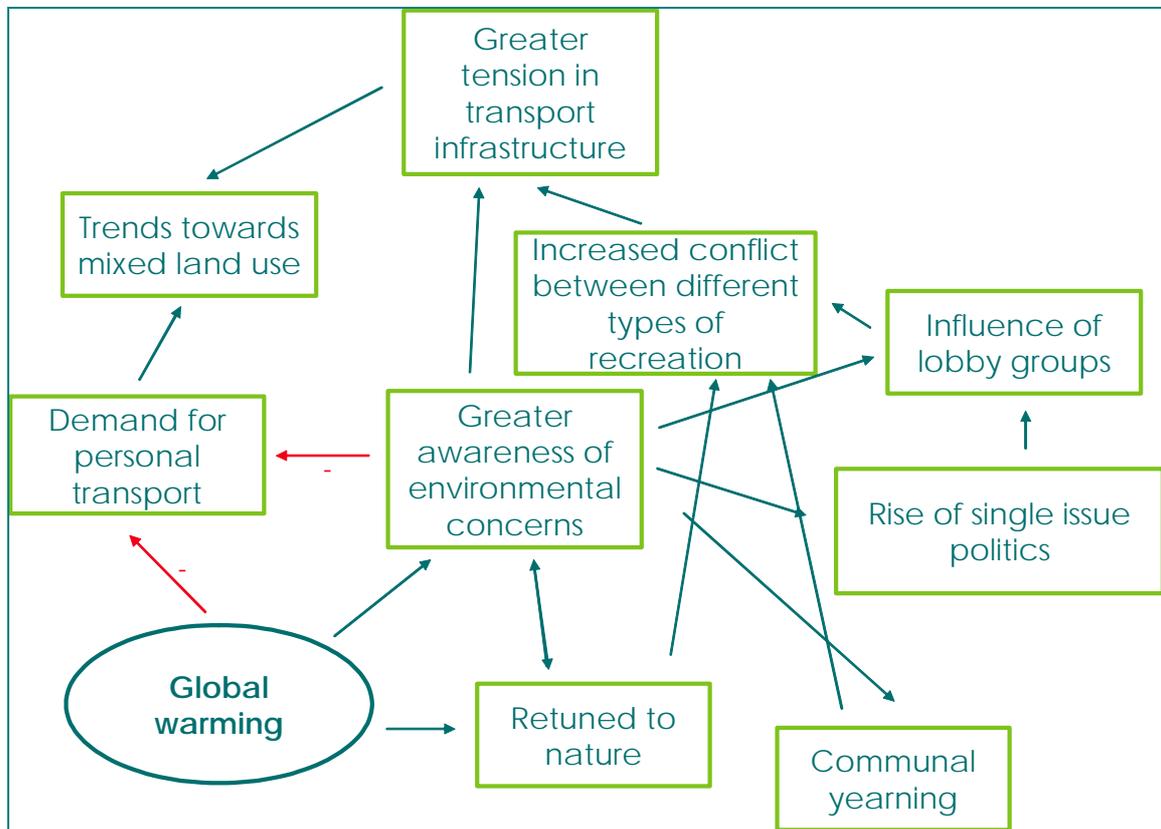
The second important group of drivers which flow from Increasing Affluence is that relating to transport, the willingness to travel, and therefore for demand for personal transport.

The third is a group related to the increasing use of household technology, which also influences the urbanisation of culture (through the increase in technology based interaction, leisure, and so on).

Affluence also increases income disparities, which has a negative effect on social inclusion.

## 1.4 Greater awareness of environmental concerns

Map of drivers for Increasing awareness of environmental concerns

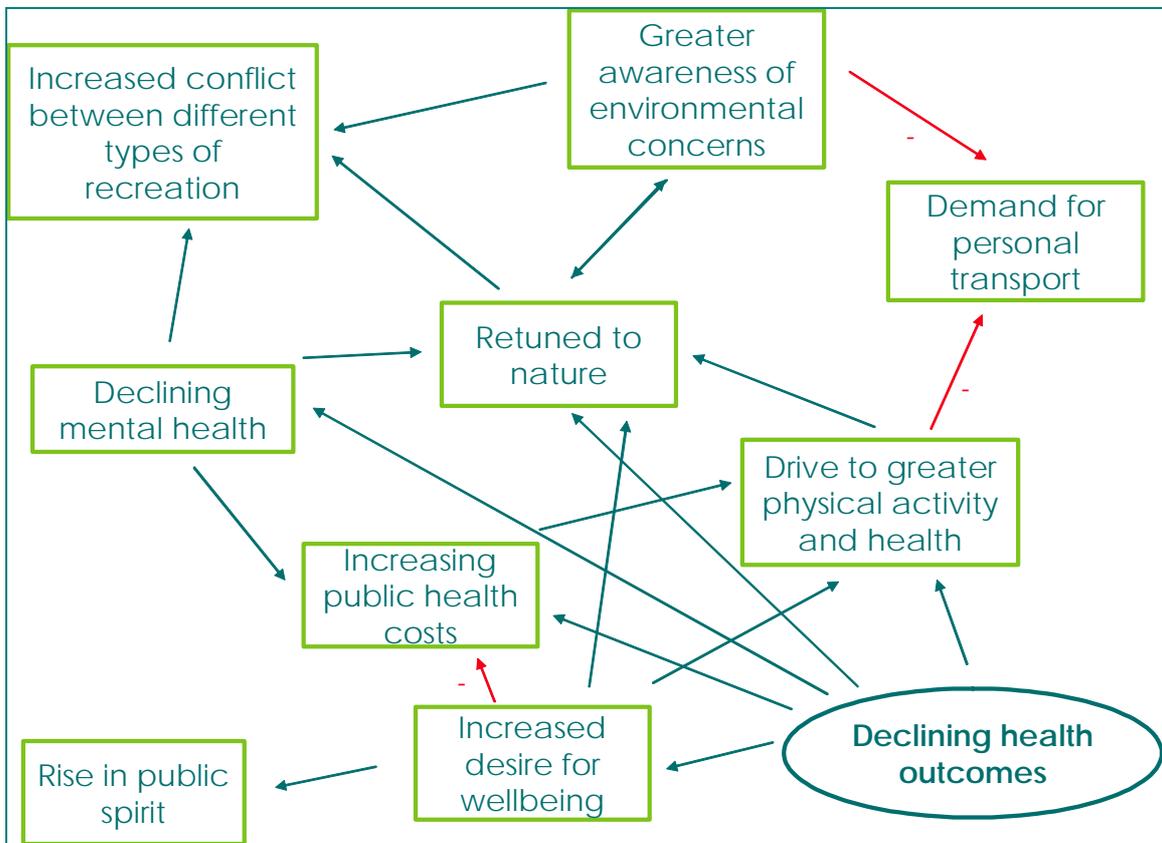


Source: Henley Centre Headlight Vision

Although global warming is at the heart of this group of drivers, it does not of itself directly influence outdoor recreation. It is too abstract for this. The driver at the heart of this cluster, which influences most of the others, is 'Greater awareness of environmental concerns'. This has a political strand leading from it, in the rise of lobby groups; an attitudinal strand, in the shape of 'communal yearning' (a desire for shared and collective experience), and a transport and planning strand. Both Global warming and Awareness of Environmental Concerns are likely to lead to reduced demand for personal transport, and increase tension around transport use. (One of the effects of the international agreements designed to reduce carbon emissions, in response to climate change is that they lead to public intervention to transport demand, with varying degrees of effectiveness.

## 1.5 Declining health outcomes

### Map of drivers for Declining health outcomes



Source: Henley Centre Headlight Vision

The group of drivers and their outcomes which are found in the set of health issues are strongly inter-connected. This is usually a sign of a set of trends which will potentially shift quite quickly in response to the right sort of trigger events. The second significant feature of this set is its degree of overlap with other drivers which are more clearly associated with the cluster of environmental drivers.

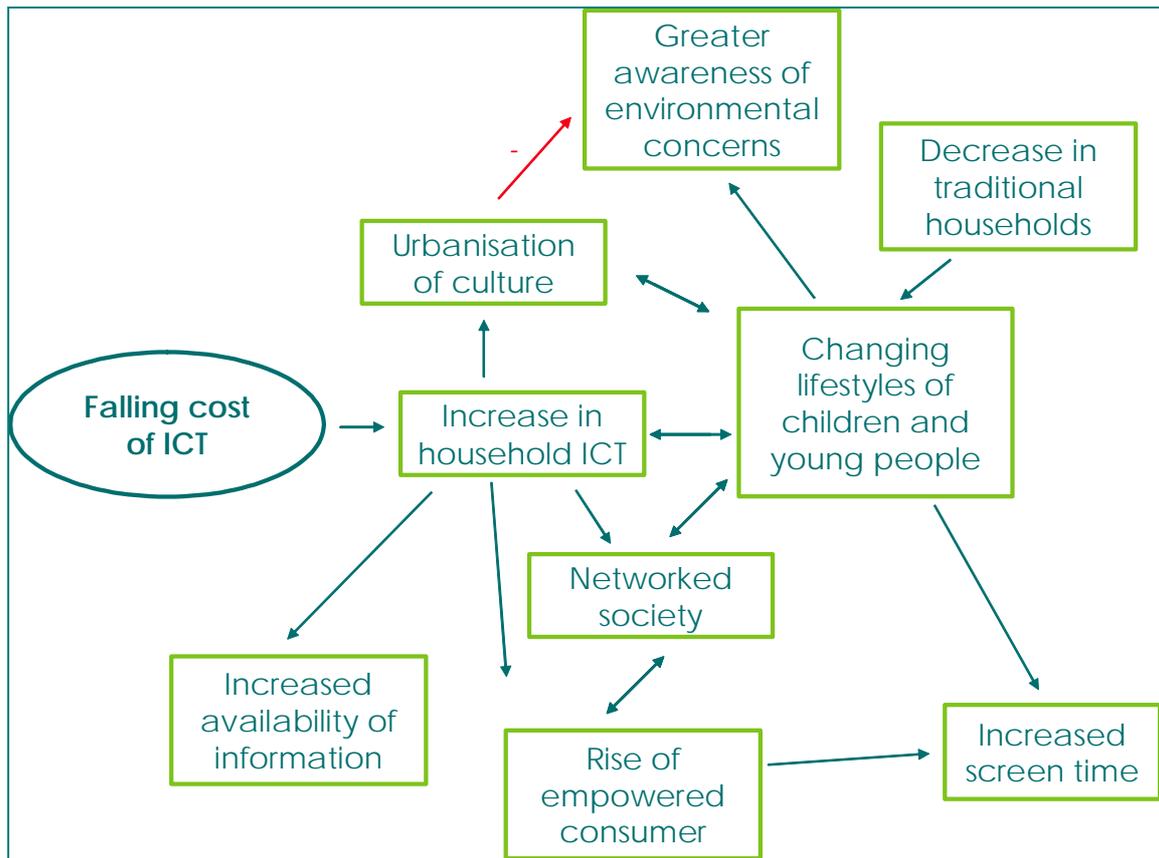
The core driver ('Declining health outcomes') is linked to three related health drivers: declining mental health; increasing public health costs; and drive to greater physical activity. But it is also linked directly to two trends which have a hint of the spiritual about them; the increase in wellbeing, and 'retuned to nature' which are also influenced by trends in the environmental area, and through these indirectly to one of the central environmental trends, 'greater awareness of environmental problems'. It is also significant that a number of the health trends are linked (negatively) to an outcome which is found on other maps: the demand for personal transport.

Reading this cluster of drivers alongside those in the Climate Change cluster above, it is clear that in some circumstances the two sets of trends could align.

In this event there will be, potentially, a significant shift towards physical activity and the use of the outdoors, provided the connection has been made between outdoors and health and wellbeing.

## 1.6 Falling costs of ICT (information communications and technology)

Map of drivers for Falling costs of ICT



Source: Henley Centre Headlight Vision

The lead driver here is the falling cost of ICT (in terms of both hardware and connectivity). The consequence has been a significant increase in the amount of computing power, and digital technology, within the average home. Over 65% of individuals have internet access, and more than 30% connect via broadband. The number of people who have videogames is high, especially among young people. In 2004 there were 60 million mobile phones in use in the UK. The consequences are cultural as well as technological.

There is an expectation that anything worth knowing can be found online, and also a strong trend towards the urbanisation of culture<sup>1</sup>, aided by the social connectivity engendered by the technologies and the reduced need to plan social events. In the short term this urbanisation of culture has reduced the awareness of environmental issues. However, it is possible that this is a trend which will reverse over time if urbanisation becomes too strong.

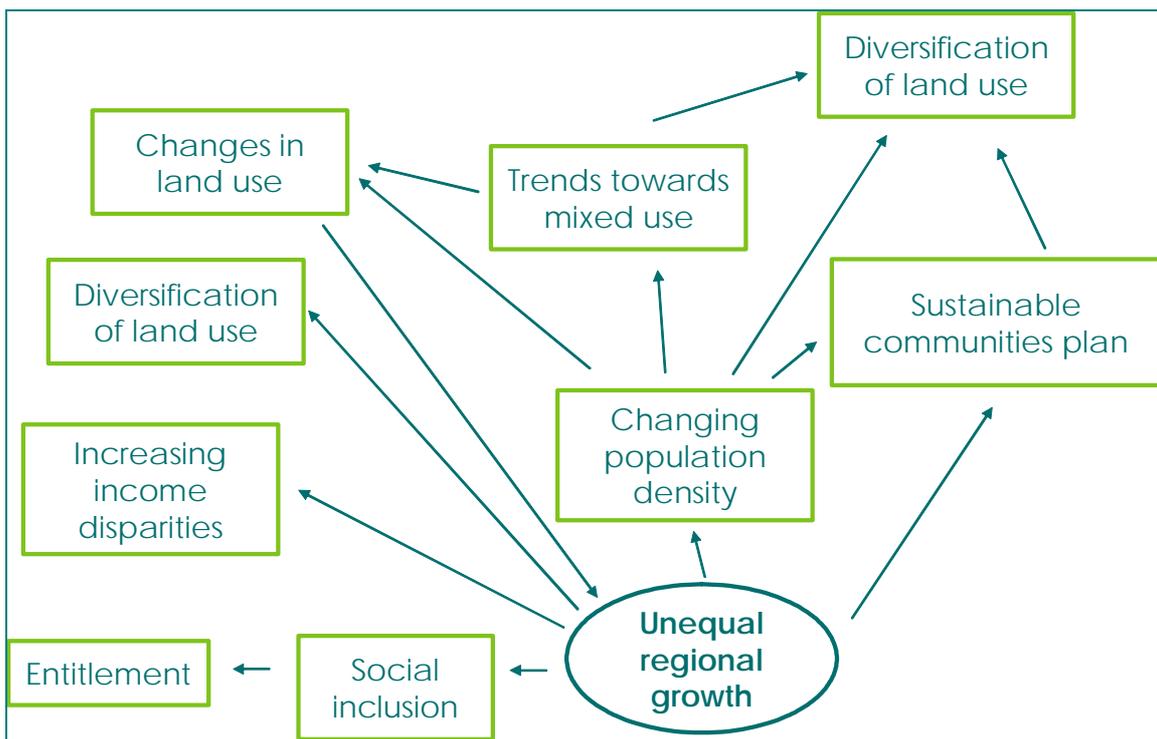
## 1.7 Disparities in regional growth

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

On the right hand side of the diagram below, one sees the effects of regional disparities in growth between south and north. Changing population densities (which have followed the boom in London over the last twenty five years) lead on the one hand to the ODPM's Sustainable Communities Plan and to guidelines which release land for building dependent on land prices. At the same time brownfield developments lead to changes in the urban landscape, the strong trends away from zoning and towards mixed use, and changes in land use. These all create the potential for a richer recreation experience within the built environment.

The other part of the story is about inequality, within and between regions, leading to policies which promote social inclusion, including the 'cultural' and aspirational' inclusion which is represented by 'entitlement'.

### Map of drivers for Disparities in Regional Growth



Source: Henley Centre Headlight Vision

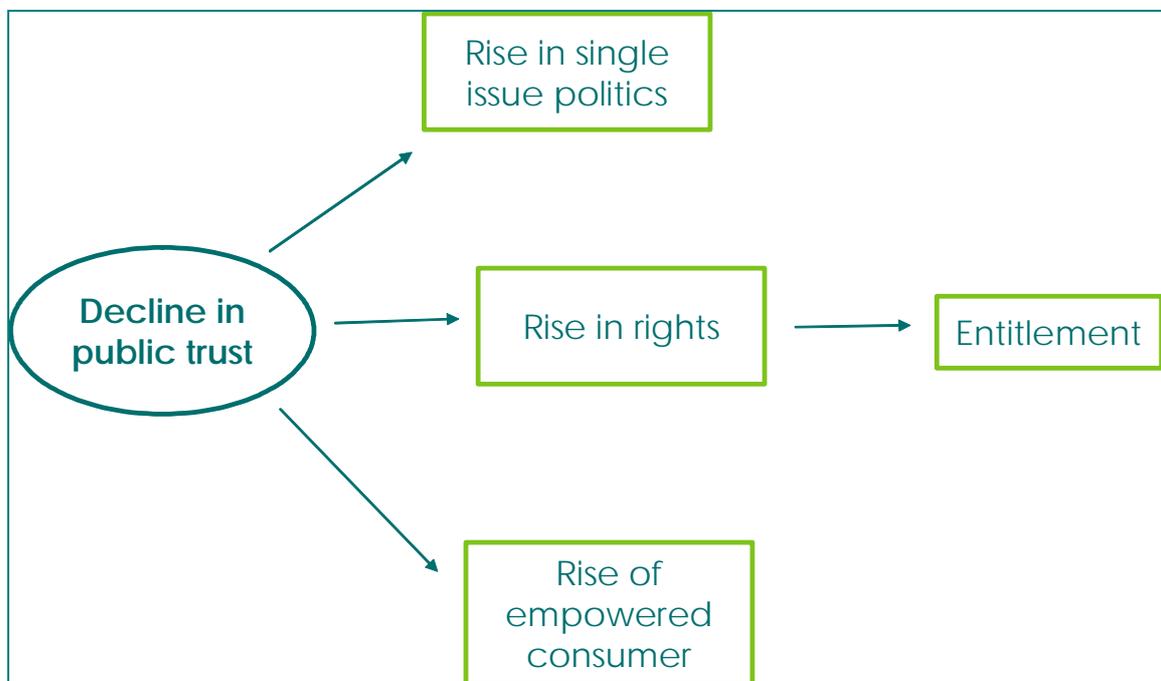
## 1.8 Public trust

This theme emerged from the initial review of relevant drivers, and was also identified as relevant in the drivers workshops. However, analysis of the trends related to it shows that it is relatively less significant than the other themes identified. This is almost certainly because the underlying factor behind this driver is a long term secular shift in the nature of authority in Western societies, which creates the environment in which public policy is determined. To an extent it represents a set of contexts in which actions around outdoor recreation are played out.

In terms of effects, it leads to outcomes at the individual consumer level (with the rise of the empowered consumer), at a group level (with the rise in single issue politics) and at a public level (with the rise in rights). The latter has been seen in the enforcement of access to public buildings, and is also a factor in the rise of the notion of 'entitlement' to public provision, in particular entitlement to cultural goods (such as live performance and art exhibitions).

This theme is significant as the decline in trust for (mainly public sector) institutions makes it difficult for any official organisation or agency to influence people's patterns of behaviour. Given that outdoor recreation requires individuals to engage at a personal level (for example, changing their daily routine), it will be necessary for any strategy to overcome this waning trust and engage people in a way which does not appear 'official' or 'institutional'.

### Map of drivers for Public trust



Source: Henley Centre Headlight Vision

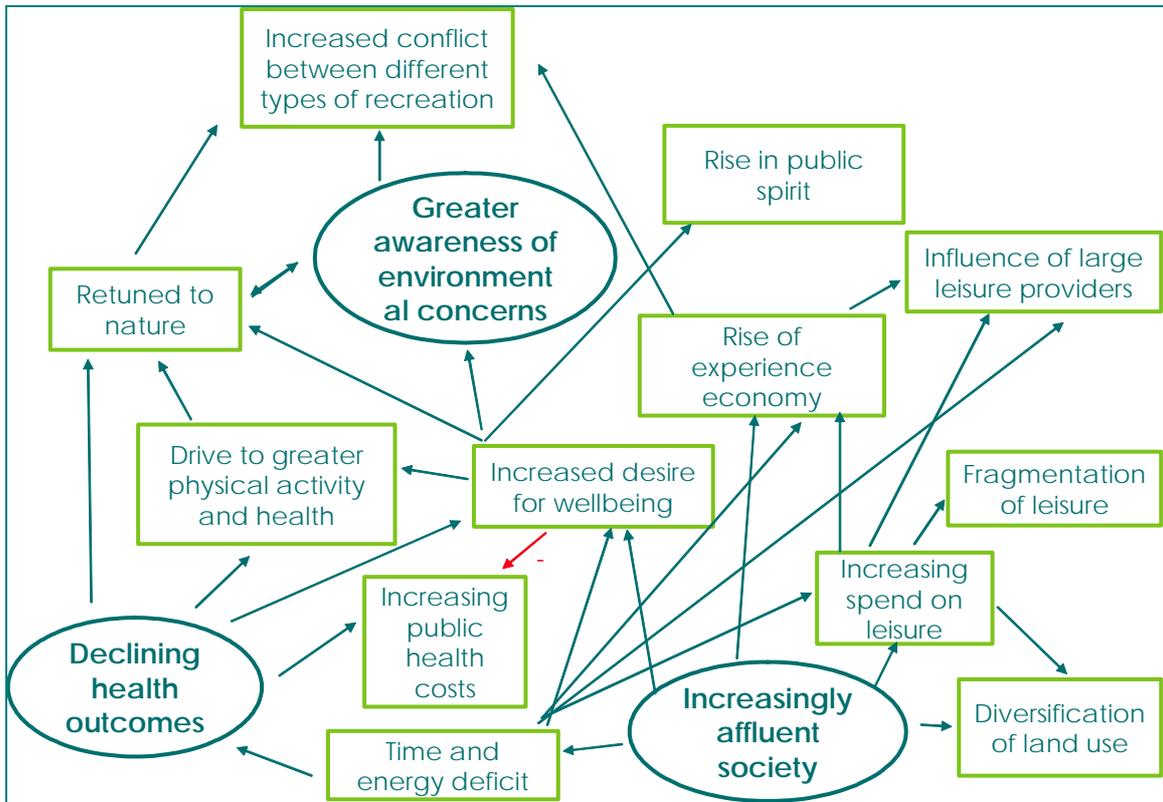
## 2 Changing expectations of leisure

Outdoor recreation's competitive set (the areas and types of activities with which outdoor recreation competes), certainly from the perspective of both demand and supply, is that of leisure. For this reason we have also analysed the outdoor recreation trends through the prism of leisure.

Although the map is quite a complex one, it is striking that the trends incorporated within it include the major trends of each of the themes of Affluence, Health, and Environment.

The map shows clearly that leisure links to these three significant but conflicting drivers of behaviour: Increasing affluence, Declining health outcomes, and Greater awareness of environmental concerns. The connecting drivers are relevant: the Increasing desire for wellbeing connects all three; while affluence and health outcomes are also connected by user Time and energy deficits, and health and environment by Retuned to nature. The significant conflict in this map is also relevant: Fragmentation of leisure in the drivers emanating from affluence contrast with greater social cohesion around the drivers linked to Increased desire for wellbeing. This highlights an important point; outdoor recreation comprising of different, 'fragmented' forms of leisure is just one model. The second model of outdoor recreation is as an opportunity for social exchange. It is important that both these approaches to outdoor recreation are acknowledged.

Trends connected to leisure



Source: Henley Centre Headlight Vision

<sup>i</sup> Urbanisation of culture encompasses the rise of indoor culture, the use of mobile technology and the increased use of the urban environment as a cultural reference point.