



HenleyCentreHeadlightVision

**Paper 1:  
Background and Introduction  
to Research**

A report for Natural England's  
outdoor recreation strategy



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# 1. Project objectives

## 1.1 Natural England

Natural England, the new organisation which will come into being following the merger of English Nature, the Rural Development Service and the Landscape, Access and Recreation teams from the Countryside Agency, will be charged with ensuring that the natural environment is conserved, enhanced and managed for the benefit of present and future generations, thereby contributing to sustainable development. This includes:

- promoting nature conservation and protecting biodiversity,
- conserving and enhancing the English landscape,
- securing the provision and improvement of facilities for the study, understanding and enjoyment of nature,
- promoting access to the countryside and open spaces and encouraging open-air recreation, and
- contributing in other ways to social and economic well being through management of the natural environment.

The delivery of sustainable outdoor recreation by Natural England incorporates each of these five purposes. Shaping an outdoor recreation strategy has therefore been identified as an important task in preparation for Natural England. As such the three confederacy organisations, Countryside Agency (CA), English Nature (EN) and Rural Development Service (RDS) are working jointly in 2005/06 to formulate an outdoor recreation strategy for Natural England.

## 1.2 Overall research objective

The Henley Centre was asked to prepare a series of robustly argued discussion papers which will inform the preparation of a draft strategy covering the remit, role, function and expected outcomes of Natural England in relation to outdoor recreation in England. The research has been framed upon the following overall 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 effectively, each of the five discussion papers have been focused on one of the following dimensions of the future of outdoor recreation:

- Paper two: Demand for outdoor recreation

- Paper three: Health and outdoor recreation
- Paper four: Supply of places for outdoor recreation
- Paper five: Planning for outdoor recreation
- Paper six: Impact of outdoor recreation

The papers address a range of critical and related topics which are sourced, evidenced, which have credibility with key stakeholders, and which form a solid platform for the development of an innovative and potentially challenging strategy for the new organisation.

This paper offers a common introduction to each of these separate reports, outlining the project background, the overall objectives and the adopted process and methodologies.

## 2 Structure of the discussion papers

The output of this research process has been compiled into a series of papers collectively referred to as 'Developing an outdoor recreation strategy: A report for Natural England.' The component papers of this report include;

### 2.1 Paper One: Background and introduction to research

- This document provides a common introduction to the research process and each of the report. Here, we provide an outline of the research project, outlining the overall objectives of the research and the adopted process and methodologies.

### 2.2 Paper Two: Demand for outdoor recreation

- The second paper addresses the following question;
  - *"What are they 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?"*
- This paper focuses on developing an understanding of changing demand for leisure experiences based around the emergence of new demographic groups (e.g. the rise of child free households; the growth in numbers of single women enjoying recreation together; the changing nature of the over 50s market); the increasing 'gap' between the mass affluent, the 'super-rich' and those perceived to be 'excluded' from outdoor recreation (e.g. the elderly, lower income groups, people with disability and ethnic groups). It looks at the challenges of communicating with, and appealing to, this increasingly diverse population, all of whom are receiving an ever increasing volume of commercial and public messages.

### 2.3 Paper Three: Health and outdoor recreation

- The third paper addresses the following question;
  - *"What role and contribution should Natural England's outdoor recreation strategy make over the long term in relation to public health and wellbeing outcomes, given the likely trends in this area over the next 20 years?"*
- This paper looks at the implications of the rise of wellbeing as a consumer focus; the parallel increase in obesity; the implications of unfit and unhealthy children; the management of increasing health inequalities within the population at large; specific issues relating to visible minorities and their access to outdoor recreation.

### 2.4 Paper Four: Supply of places for outdoor recreation

- The fourth paper 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?”*
- This paper looks at the implications of the changing leisure experience for places for outdoor recreation; the changing consumer perspective and the rate of infrastructure change needed to accommodate or manage changes in demand; potential impact of legislative changes; and the implications of increased demand for outdoor recreation on the supply of places.

## 2.5 Paper Five: Planning for outdoor recreation

- The fifth paper addresses the following question;
  - *“How are national, regional and local planning and spatial frameworks likely to develop over the next 20 years and what risks and opportunities does this create in relation to Natural England’s long term strategy for outdoor recreation?”*
- Planning is a significant issue in relation to many aspects of outdoor recreation, particularly the relative supply and demand for outdoor recreation, and the health outcomes and other impacts that result.
- This paper focuses on developing an understanding of how existing planning frameworks at a national, regional and local level would develop over the next 20 years. In addition it helps understand the implications of these possible changes for the long term strategy for outdoor recreation in terms of the risks and opportunities that the different influences on planning frameworks might present in the future.

## 2.6 Paper Six: The impact of outdoor recreation

- This paper takes an overview of the findings from the other four reports. It pulls together the influences of change in the areas of demand, supply, planning for outdoor recreation and in the relationship between health and outdoor recreation. From this overview, the impact paper builds a broad framework of understanding and identifies the critical issues facing the future outdoor recreation strategy.

## 2.7 Other appendices

- Appendix A: Mapping the impact of outdoor recreation
- Appendix B: Potential drivers of change in outdoor recreation to 2020
  - Complete list of factors, created from the explorative research of Phase 1, that were considered as influential drivers of change in outdoor recreation.
- Appendix C: Trends assessment workshop presentation
  - Summary presentation of potential drivers of change in outdoor recreation identified from insights gathered during Phase 1 of research. The presentation was used for stimulus and discussion during the trends assessment workshops.

- Appendix D: List of organisations participating in the 'Trends assessment' workshops
- Appendix E: References
- Appendix F: Executive interview, discussion guide
- Appendix G: Executive interviews, participating organisations
- Appendix H: Glossary
- Appendix I: Understanding the barriers to participation in outdoor recreation
  - Qualitative research component for 'Natural England'
  - Full focus group debrief report
- Appendix J: Comparison of impact mapping across papers 2 to 6
- Appendix K: Detail on the futures mapping process

### 3 Defining outdoor recreation

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

- **Just being out doors** - such as watching wildlife, looking at the view, picnicking
- **Creative activities** - such as art, photography, story telling and music
- **Health or relaxation** - such as walking, jogging, dog walking, horse riding, cycling tracks or touring
- **Utility journeys** - which also provide a recreation experience (e.g. Greenways to connect people and place), safe routes to schools
- **Informal games and play** – such as kite flying, model aircraft, glider flying, sand castles, sledging
- **High adrenalin, non-competitive activities** - such as canoeing (touring and play); caving, climbing and bouldering; mountain biking
- **Commercially run activities** - where Natural England could support an entrepreneurial approach to providing a wider range of the activities listed above to more people and to benefit the rural economy
- **Study of the natural environment** - including field studies (FSC and educational centres), geological survey, community environmental surveys, wildlife watch activities
- **Educational activities and programmes**
- **Conservation volunteering**
- **Sustainable journeys to outdoor recreation** - better connections on foot, cycle or horse, more public transport allowing journeys without private motor vehicles

One of the issues with conceptualising 'outdoor recreation' is that it covers a huge range of activity, from mountaineering to flying kites to walking to a family picnic. The potential range of locations is also huge, from close to home to far away. To help simplify this, we evolved a matrix which structures the issue around the amount of planning involved by the user and the distance travelled.



## Defining outdoor recreation



The horizontal axis runs from 'Close to home' to 'Far from home'; the vertical axis runs from "Planned" at the top to "Incidental" at the bottom, meaning outdoor recreation which is fitted in around other activities.

Taking each space in turn: in the top left (Planned/Close to home) we find activities such as a group or family walk in a nearby park or on a cycleway, or going to a local hill to fly a kite. In the bottom left, we might see someone choosing to have their lunch in a square or public space close to their office, rather than in the office itself, or taking a small detour to walk home along a canal towpath or riverside rather than along a main street. In the top right we have a classic view of Outdoor Recreation as a planned visit to an area to climb a hill or go to a country house. In the bottom right, outdoor recreation opportunities are connected to other planned leisure or tourism activities (even though outdoor recreation is not the primary purpose); so, for example, on a city break trip one takes the time to visit the botanic gardens or the local castle.

Historically, quite a lot of work in the recreation area has focussed on the idea of recreation as something planned and far from home, although this has changed substantially over recent years. But from our research with low users of outdoor recreation, one of the barriers was that such users also saw outdoor recreation in this area, meaning that there were perceived barriers around

access and information, as well as confidence, which in turn reduced their participation.

Encouraging outdoor recreation requires different approaches in different areas in different parts of the matrix; on the right hand side, it is linked to people's perceptions of leisure and tourism. On the left hand side, it is more closely related to the public health and physical activity agenda. One can also imagine an evolutionary path which encourages participation in outdoor recreation by developing positive associations and increases confidence for low users. This starts with Incidental use close to home in the bottom left, migrates towards the top left, and then moves over to becoming part of the user's more formal leisure and tourism mix on the right hand side of the matrix.

The definition of outdoor recreation and the conceptual map are referred to in each of the five main papers.

## 4 Research process and methods

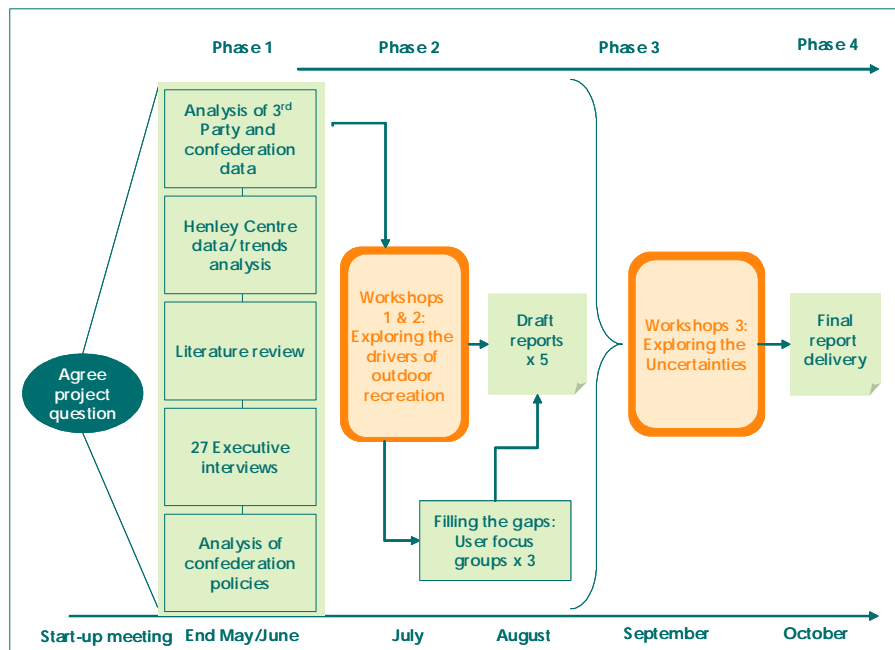
The content of the discussion papers has been developed from a wide range of sources, findings from a process of consultation and wider literature. In addition Henley Centre, as a strategic futures consultancy, has drawn upon its knowledge of the leisure sector, the consumer perspective, and the social, economic, cultural and technological trends that will drive change in the leisure landscape over the next ten years.

For each discussion paper, Henley Centre has aimed to:

- Research relevant policies and aspirations of confederation and other relevant bodies which have direct and indirect implications for countryside recreation.
- Consult key organisations on issues for consideration in relation to Natural England's outdoor recreation strategy.
- Draft the papers in a way which will stimulate discussion and guide development of the emerging strategy.

### 4.1 Overall work streams and timings

The research project was divided into four distinct phases:



## 4.2 Phase 1: Research and discovery

### 4.2.1 Agreeing the project question

The first stage in any strategic futures process is to establish the project question. This question should identify the scope of the futures process and the timescale, and thereby help focus the analysis and discussion.

The overall project question was discussed and agreed at the very start of the research project. In addition, the first four discussion papers were given a particular question to address, in order to focus the analysis of each report.

- Demand for outdoor recreation
  - “What are they 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?”
- Health and outdoor recreation
  - “What role and contribution should Natural England’s outdoor recreation strategy make over the long term in relation to public health and wellbeing outcomes, given the likely trends in this area over the next 20 years?”
- Supply of places for outdoor recreation

- “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?”
- Planning for outdoor recreation
- “How are national, regional and local planning and spatial frameworks likely to develop over the next 20 years and what risks and opportunities does this create in relation to Natural England’s long term strategy for outdoor recreation?”

#### 4.2.2 Review and discovery

Once the scope of the overall project and each paper had been set within the context of the respective research questions, the components of the baseline research for all five papers began. There were four strands to this part of the work:

- Review of relevant underlying data, including Henley Centre UK social trends data, UK leisure data (e.g. from the British Market Research Bureau’s (BMRB), Target Group Index (TGI) and tourism industry ‘day visits’ data); Countryside Agency ‘State of the Countryside’ data; relevant third party data (such as demographics, household, and transport data), from sources such as Office of National Statistics (ONS);
- Literature and policy review, to establish relevant policies and aspirations of confederation and relevant bodies, as well as other views which may be relevant to Natural England’s strategic purpose in the area of ‘Outdoor Recreation’;

(See Appendix E for a list of the publications reviewed during this stage of the research).

- Executive interviews with members of key organisations, as well as opinion formers and critics. These interviews were structured to ensure that key themes emerged in a comparable way. A total of 27 interviews were conducted to ensure a sufficient range of opinion was gathered and also to ensure that relevant organisations had been engaged (see appendix F and G for a list of the organisations consulted at this stage and for the executive interview discussion guide);

The outputs of this stage provided much of the content for each paper. The mass of insight gained was also refined into a set of ‘drivers of change’, i.e. influential factors in the future development of outdoor recreation, and explored further in phase 2 of the research project. (See Appendix B for the full list of drivers of change of outdoor recreation).

## 4.3 Phase 2: Testing findings, digging deeper

### 4.3.1 Trends assessment workshops

The purpose of the workshops was to review the drivers of change with stakeholders in a dynamic rather than passive way, to capture ideas, and to note areas of conflict. The workshops also enabled us to identify potential connections between the five areas covered by the papers at an early stage, ensuring a richer, more 'joined-up' approach.

Both workshops began with a presentation to participants of all the identified potential drivers of change of outdoor recreation, the content of which was formed from the output of phase 1. Participants were then asked to prioritise the drivers of change within the context of four of the paper areas, namely demand, supply, health and planning through a series of structured and facilitated group exercises. (See Appendix B for the full drivers of change of outdoor recreation presentation). (The issues for paper one, the impact paper, emerged in a structured manner from the output of both workshops).

A range of stakeholder organisations were invited to participate in the trends assessment workshops. In order to assure a wide breadth of participation, the consultation process was carried out twice, once in Birmingham and once in York. (See Appendix D for the full list of participating stakeholder organisations).

The output from the workshops enabled the themes which emerged from Phase 1 to be tested by a broad group, and in an environment where assumptions were open to challenge. This gave extra richness to the development of the papers and also allowed issues, where there was not yet adequate understanding, or where diverging views need to be understood and potentially resolved, to surface.

The workshop design, content and methodology was shared with the confederation project team in advance of the workshops enabling improvements to be made through discussion.

### 4.3.2 Filling the gaps: User focus groups

A post-workshop review of the outputs generated from Phases 1 and 2, prior to drafting the structure and content of each paper, revealed a potential gap in the knowledge and understanding underpinning a strategy for outdoor recreation. The insight provided from the available literature and the tacit knowledge of executive interviewees and workshop participants showed a thorough understanding of the supply and planning side issues facing the future of outdoor recreation, from for example the top down legislative context through to the management of places for outdoor recreation on a site by site basis. An equally thorough appreciation for the perspective of potential users of outdoor recreation however was not as forthcoming. Notable research in this area has been carried out, for example the ETHNOS Diversity Review.

However, this work focused on the barriers to participation for certain groups within society and not for society as a whole.

In order to fill this gap in the understanding, a small number of focus groups with potential end-users of outdoor recreation were carried out. The overall objective was to:

- Understand how the outdoors is perceived by three key life stages and how this influences participation;
- To identify general barriers to the outdoor experience in three key life stages, so as to highlight possible future routes to connection.

Participants were chosen on the basis of low current involvement in outdoor activity, but also openness to the idea of increasing their outdoor participation. Respondents came from a cross section of society and were arranged into three age groups: young adults (between 17 and 21 years), young families (those with children between 4 and 11 years old) and seniors (over 55 years). The focus groups were recruited and conducted in Sheffield, as it was judged to be a city that provides a consistent balance between an accessible urban environment whilst remaining within easy range of a number of key outdoor leisure and recreation centres

All participants filled out an in-depth pre-task questionnaire, followed by a two hour focus group discussion of the issues, thereby allowing the barriers to engagement in outdoor recreation to be explored in depth. (See the full focus group report for further detail, Appendix I, 'Understanding the barrier to participation in outdoor recreation'). The output of the focus groups has been fully incorporated into the four main discussion papers.

## **4.4 Phase 3: Assessing the uncertainties**

Phase 3 of the research project involved a comprehensive review of the prioritised drivers of change of outdoor recreation within the context of each paper. The main objective was to identify and understand the greatest areas of opportunity and threat facing the new organisation, 'Natural England', and its outdoor recreation strategy.

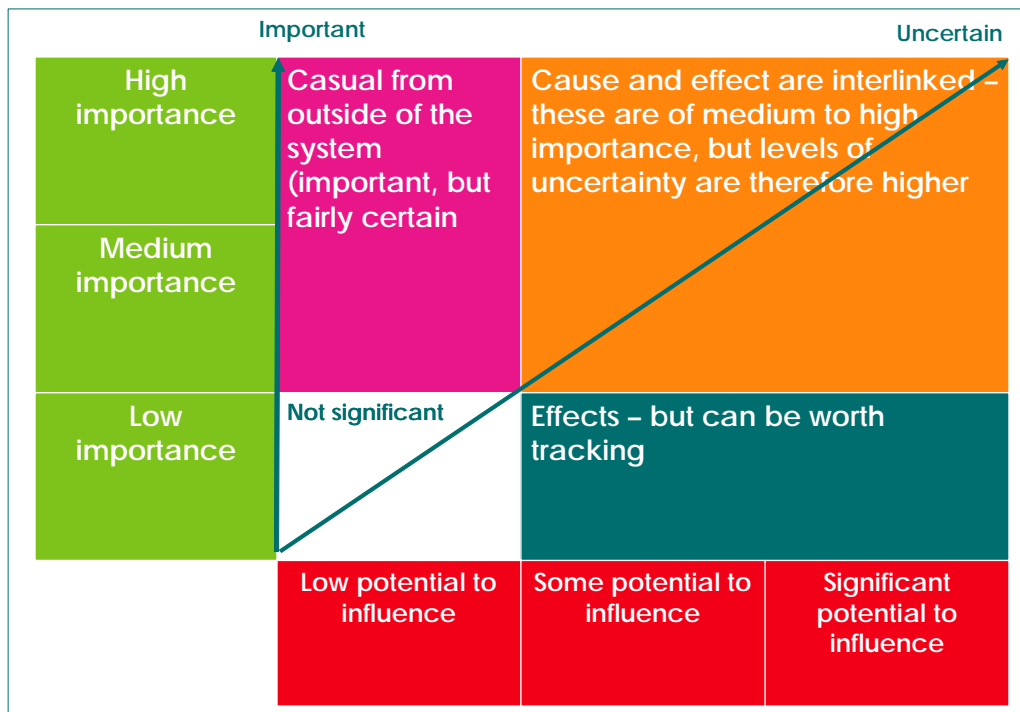
### **4.4.1 Futures mapping**

Essentially, the set of prioritised drivers identified for each paper, as well as additional relevant drivers and sub-drivers of change, were 'mapped' onto each other. That is, the links between each driver were identified and the nature of these connections were explored so that each driver had been thoroughly analysed within the context of all the others. The output of this process is captured visually within a map illustrating the perceived connections between drivers.

This process of futures mapping, known as the 'impact matrix', is used to help us understand which of four categories a driver of change is likely to fall into:

- A causal, or 'context-setting' driver, which will change regardless of any actions taken by participants;
- Drivers which are both **important** and **open to influence**, and whose behaviour is highly likely therefore to be influenced by actions taken by agents within the overall system (for example, Natural England, ODPM, local authorities, health authorities, Department for Transport, and so on);
- Drivers which are 'dependent', and therefore an outcome of the important/indrivers, and whose behaviour might be a measure of the way in which the overall system is changing, or a consequence which has to be managed;
- Drivers which, although they are part of the overall system, are not influential in terms of the overall behaviour of the whole system.

The schematic below shows these relationships in a diagrammatic fashion:



Source: Henley Centre

From this analysis it is possible to identify the areas of outdoor recreation where the drivers come together to magnify an outcome, or where they act in opposition and so work against each other.

This work was also conducted in the hope of identifying the major links of dependency between the drivers i.e. which drivers are most **open to influence** by other drivers, and which drivers are the most **influential or important** over the direction of other drivers.

Many drivers will cluster into either the **open to influence** camp or the **high importance** category. Factors that are identified as both are the areas of



greatest uncertainty, and hence the areas presenting the greatest opportunity and/or threat to Natural England's outdoor recreation strategy.

The areas of greatest uncertainty, and the potential worst and best case outcomes they present, have been explored within the discussion papers.

For more detail on the futures mapping process please refer to 'Appendix K Detail on the futures mapping process'.

### ***Impact on outdoor recreation paper***

The purpose of this paper is to connect the themes which have emerged from the strands of the other four papers; and from these to identify the key issues which will have most overall impact on outdoor recreation and thus to be able to assess the most critical issues.

The impact on outdoor recreation paper was, therefore, designed to provide an overview of the findings from all of the four other research papers. The mapping process undertaken for this paper therefore drew on insights from across the entire project process.

#### **4.4.2 Exploring the uncertainties workshop**

The identified areas of uncertainty and the barriers to participation were explored further in a third consultative workshop. This workshop, which was held in Derby, took place on 14 September 2005. Colleagues from the regional offices and some national team leads from each of the three organisations, CA, EN and RDS were invited to participate.

The objective of the workshop was to:

- Explore further the barriers to participation in outdoor recreation of different groups within society;
- Explore further the areas of greatest uncertainty from the perspective of the end-user.

This was achieved through a day long process involving structured exercises and facilitated discussion. End-users were typified through pen portraits built from a combination of wider demographic trends to 2020 and from the focus group analysis. 'Day in the life' explorative group work helped to bring the end-user to life and to explore the nature of everyday barriers to engagement in outdoor recreation, and how the barriers combine together to produce a substantial cumulative effect.