



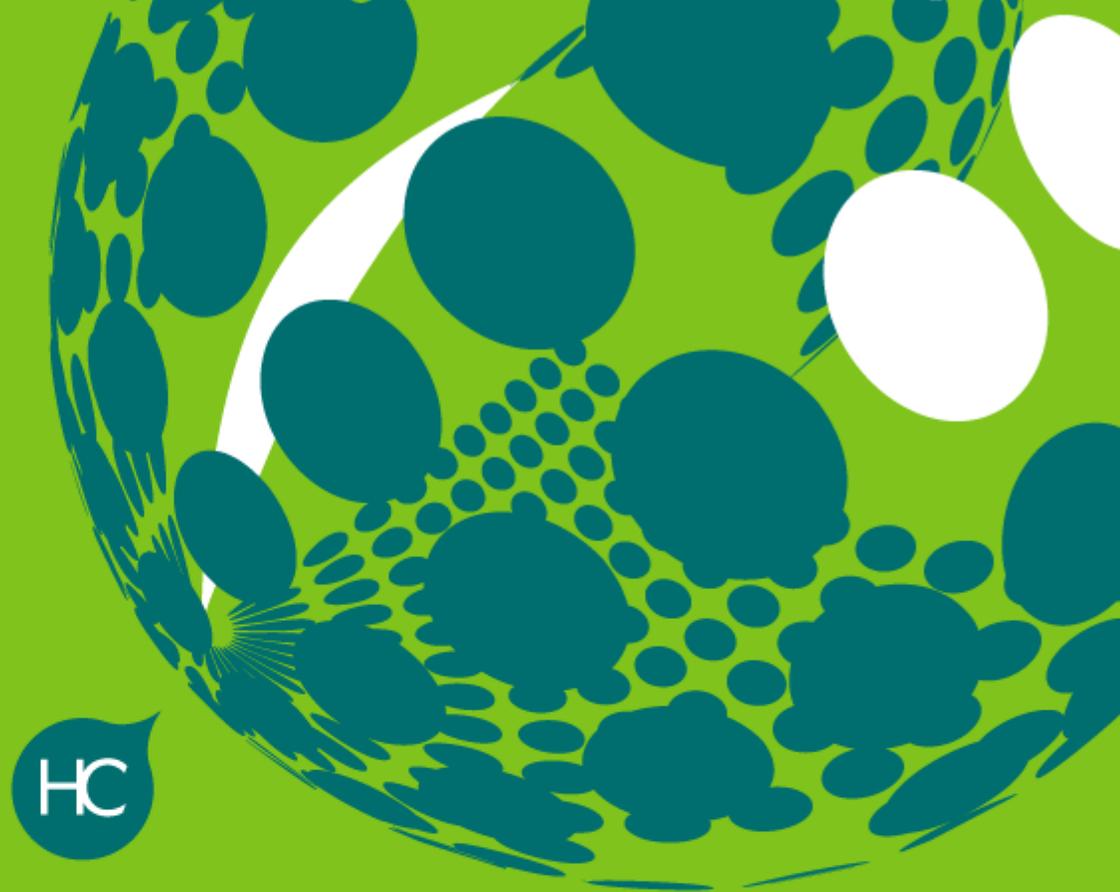
HenleyCentre

Workshop to inform the future strategy of Natural England

21 July 2005

Agenda

- Introduction to Henley Centre HeadLightVision
- Introduction to the day
- Background to research
- The potential drivers of outdoor recreation



Background to the project

Natural England's requirement

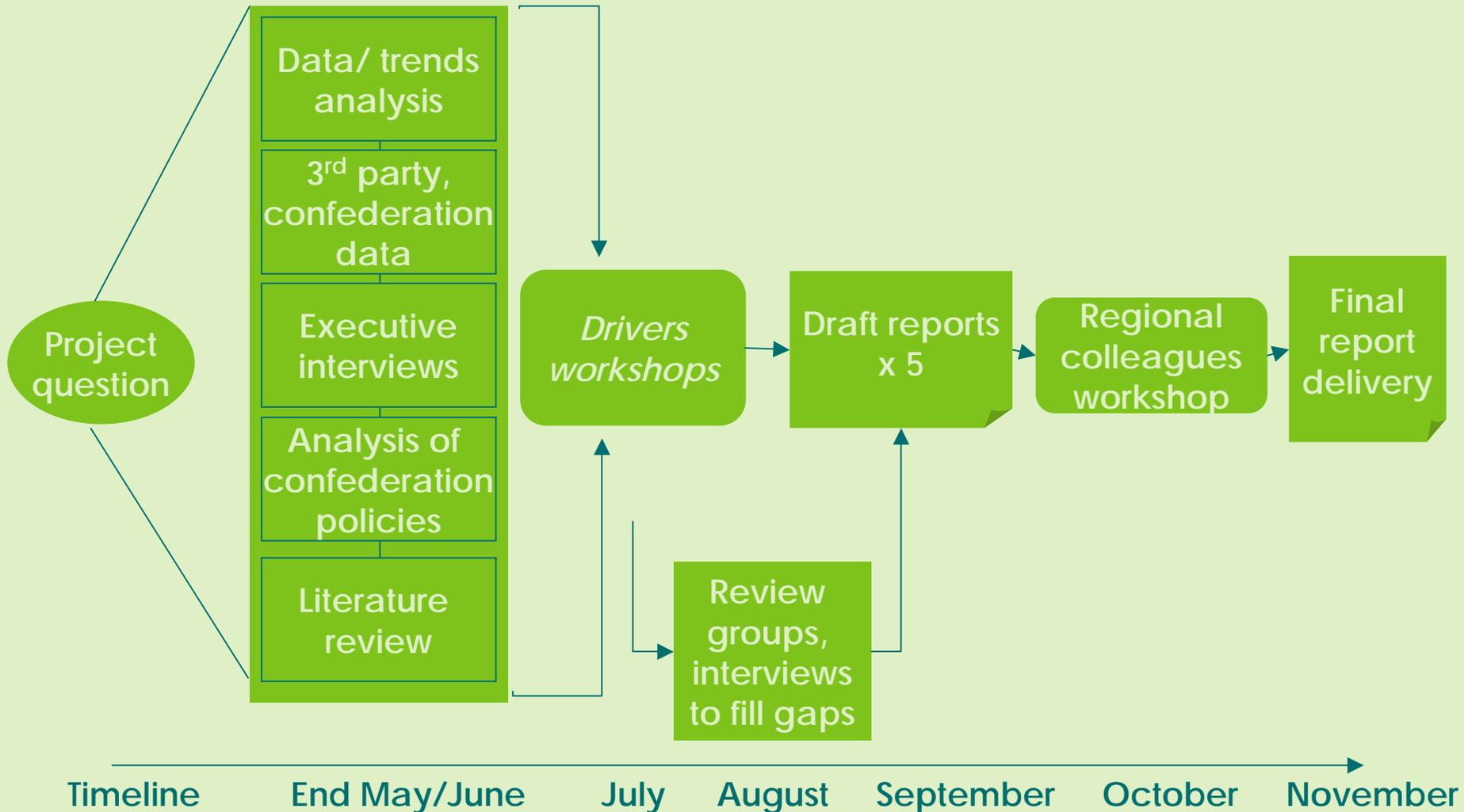
- 'Natural England' is the new organisation constructed from the merger of English Nature, the Rural Development Service, and the Countryside Agency
- It has asked Henley Centre HeadlightVision to inform on the development of a strategy for outdoor recreation

Overall project 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?”

The project process

Phase 1 Phase 2 Phase 3 Phase 4 Phase 5 Phase 6



The key questions for the project

- Demand for outdoor recreation
 - “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?”
- 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?”

The key questions

- Health
 - “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?”
- 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?”

The key questions

- Impact of outdoor recreation
 - “How well are the likely impacts resulting from the development of outdoor recreation over the next 20 years understood and what implications does this knowledge have for the development of Natural England’s long term strategy?”



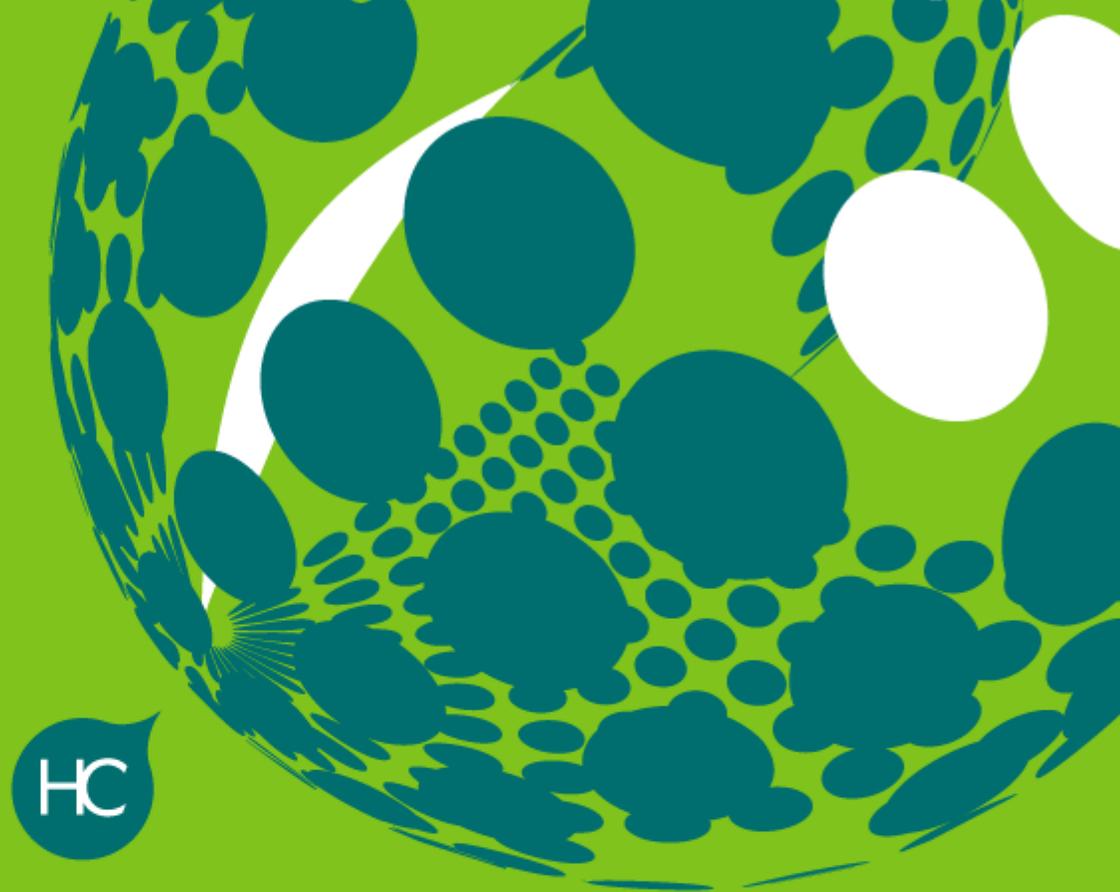
Introduction to the day

Workshop objective

To identify and prioritise the key drivers and other factors shaping the future of outdoor recreation in England over the next 15 to 20 years

Timings and process

- 10.15am Introduction
- 10.45 – 11.15am Drivers presentation and scoring
- 11.15 – 11.30am Break
- 11.30 – 12.30pm Identifying & prioritising the key drivers
 - Group work
- 12.30 – 1.15pm Review of findings
 - Feedback all together
- 1.15 – 1.45pm Lunch
- 1.45 – 2.45pm Looking for uncertainties
 - Group work
- 2.45 – 3.00pm Break
- 3.30 – 4.15pm Impact and managing the issues
 - All together
- 4.15 – 4.20pm Close



The potential drivers for outdoor recreation

Decrease in traditional households

- **Married couple households have fallen** from 11.2m to 10.2m and are predicted to fall to 9.4m in 2011
- **Single person households will increase** from 30% of total households in 2001 to 33% in 2011
- **Multi households will increase** (unrelated adults sharing a house) predicted to increase by over 30% from '96 to 2011

% of consumers who are part of a couple with no dependent children in their house

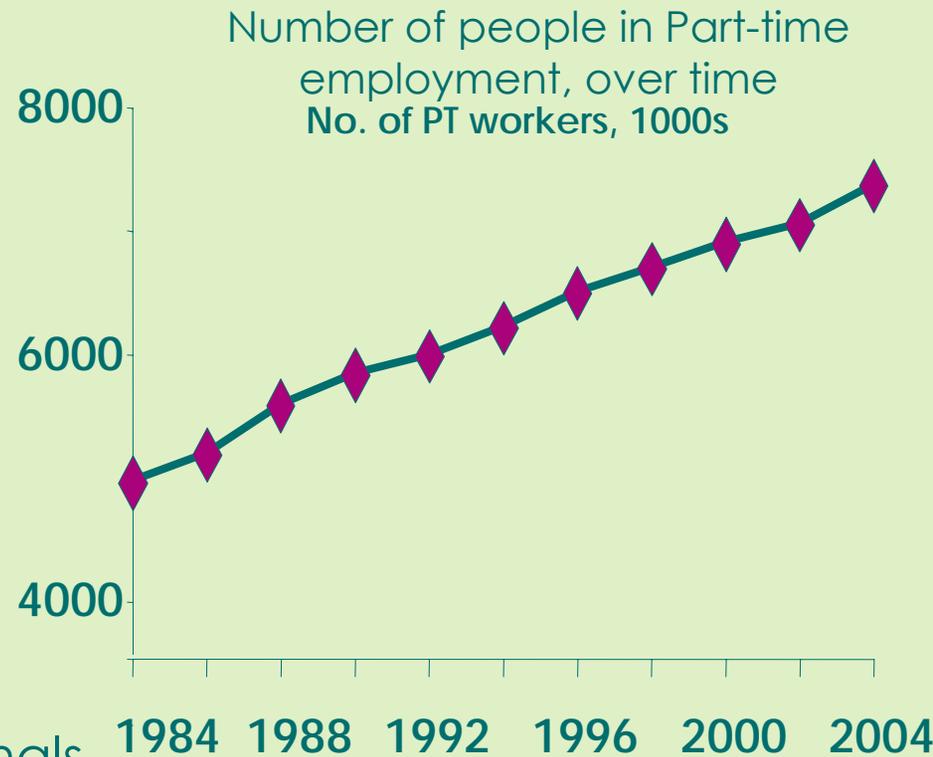


A move away from traditional family patterns and outings

The rise in single person households has made people more reliant on leisure activities to meet new people and spend time in the company of others

Changing working patterns

- Rise in part-time working and multiple jobs
- Home working is becoming more popular
- Traditional single full-time jobs are decreasing
- A proliferation in career breaks in the form of GAP years or sabbaticals. In 2000, VSO saw 50% increase in applications from IT and marketing professionals



A desire for more leisure and a need for greater flexibility

Greater work pressure has led to a thirst for a better work life balance, but leisure time needs to be flexible and fit around an atypical working week

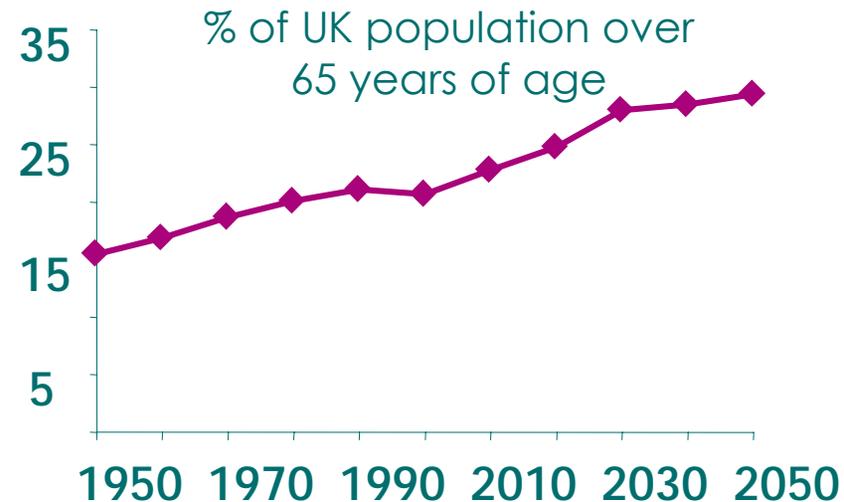
- People are living longer

- By 2011 life expectancy will have increased to 82 for women & 77 for men (from 79.6 and 74.6 in 1997 respectively)

The average age of a Harley Davidson rider rose from 38 to 46 over the past decade

- Agelessness, a growing trend

- Older generations enjoy activities not traditionally associated with 'someone of their age'



Catering for a changing demographic

Growing retired population with growing leisure needs, in terms of frequency, intensity and variety

Rise of public spirit

- **Growing desire to 'give back'**
 - 56% of people believe that quality of life is best improved by looking after the community's interest rather than simply their own
- **Growth in volunteering**
 - 42% of people were involved with formal volunteering in 2003, compared with 39% in 2001
- **Charity events**
 - The rise in large scale charity events which use outdoor recreation for fundraising e.g. 'The 3 Peaks Challenge'



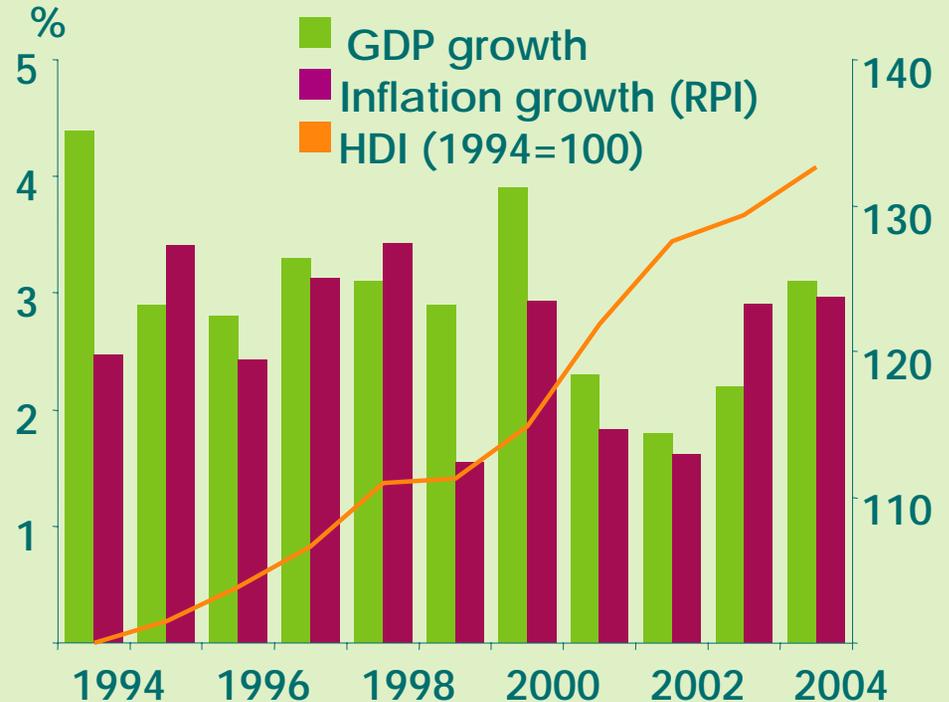
There is a growing interest in local communities and charities

This culture inclines people towards both participating in and volunteering for outdoor recreation activities

Increasingly affluent society

- **We are better off than we were**
 - 55% better off than in 1990
- **Middle class is growing in size and becoming stronger**
 - 70% of the middle class are owner occupiers of their homes

% change in GDP, inflation household disposable income



Greater affluence fuels demand for leisure and broadens the array of choice at our fingertips

Influence of large leisure providers

- Increasing commercialisation around outdoor recreation
- Focus on kit, equipment and 'the right gear'
 - A possible disincentive to excluded groups
- Uncertainty over role of agencies and corporations in guiding the future of outdoors recreation

“There’s a big industry around outdoor leisure...in many instances its image is as an expensive pursuit”

Henley Centre Interview 2005

“Recreation is viewed more as a package now”

Henley Centre interviews 2005



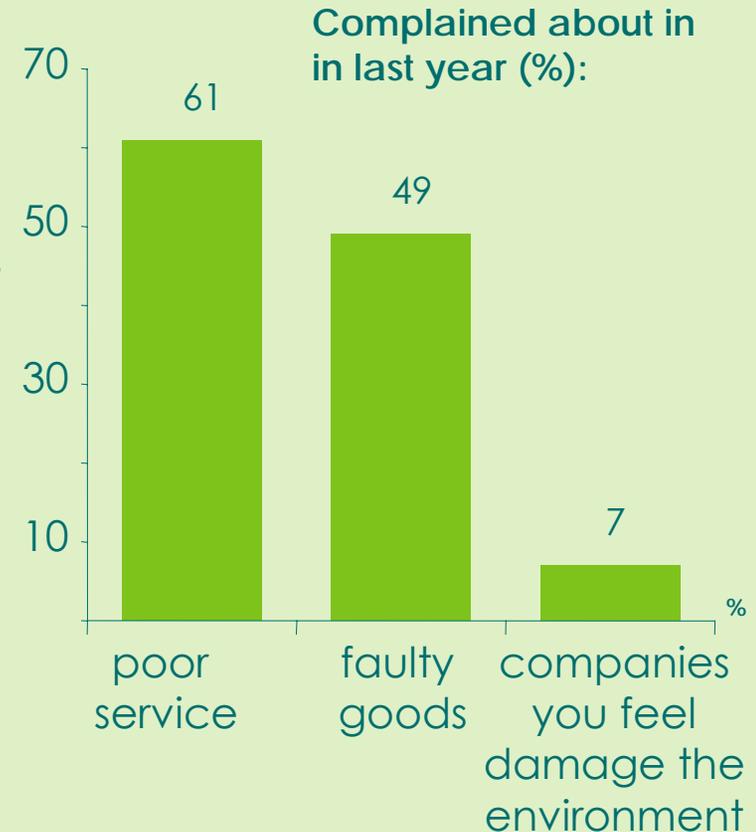
More large leisure businesses and greater commercialisation of outdoors recreation
 Threats to diversity agenda and role of agencies

Rise of the empowered consumer

- Consumers have become much more demanding
- We are much harder to please
 - We have higher expectations of service and we complain more

“It's no longer enough to satisfy consumers. Today consumers must be delighted.”

Roger D. Blackwell, Author, 'Consumers Rule'

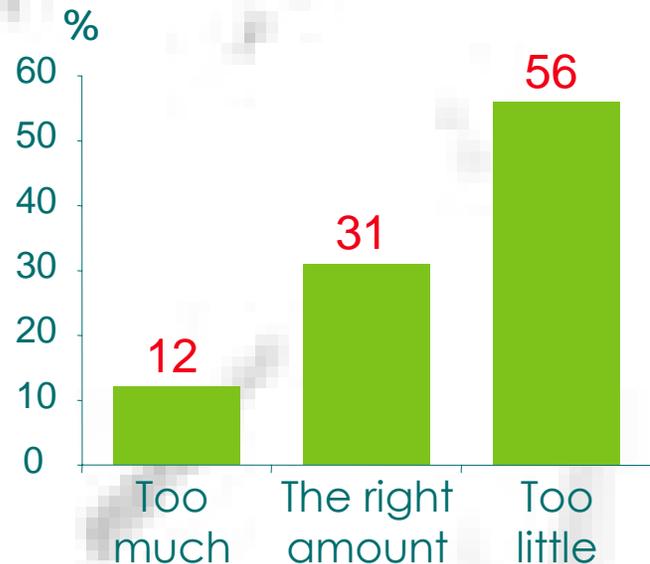


People are harder to please
Product/service offers have to 'delight'

Convenience culture

- **People perceive a lack of time in their lives:**
 - 57% of people agree: 'I never seem to have enough time to get things done'
- **Value of time**
 - 40% of people agree 'I am willing to spend money to save time'
- **Convenience** therefore becomes an important means of making the most of time available

Please indicate how much or how little time you feel you have at your disposal



People increasingly value convenience

People are drawn to activities which seem to use their time well

Networked society

- 'Always on':

- 600% growth of 24 hour Tesco stores from 2002 to 2003

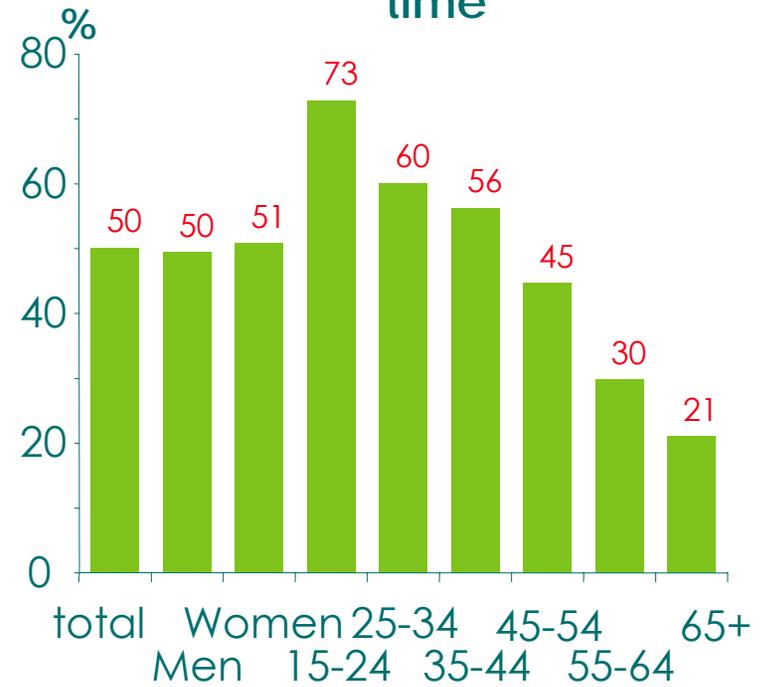
- Last minute planning

- Facilitated by mobiles (especially 3G phones) and the internet

- Sense of safety

- Mobile phones offer people confidence when outdoors, be it a child in a park or an inexperienced rambler on a mountain

I like to be contactable on my mobile phone all of the time



lastminute.com
europe's most visited travel & leisure website

Technology has connected people and changed their habits

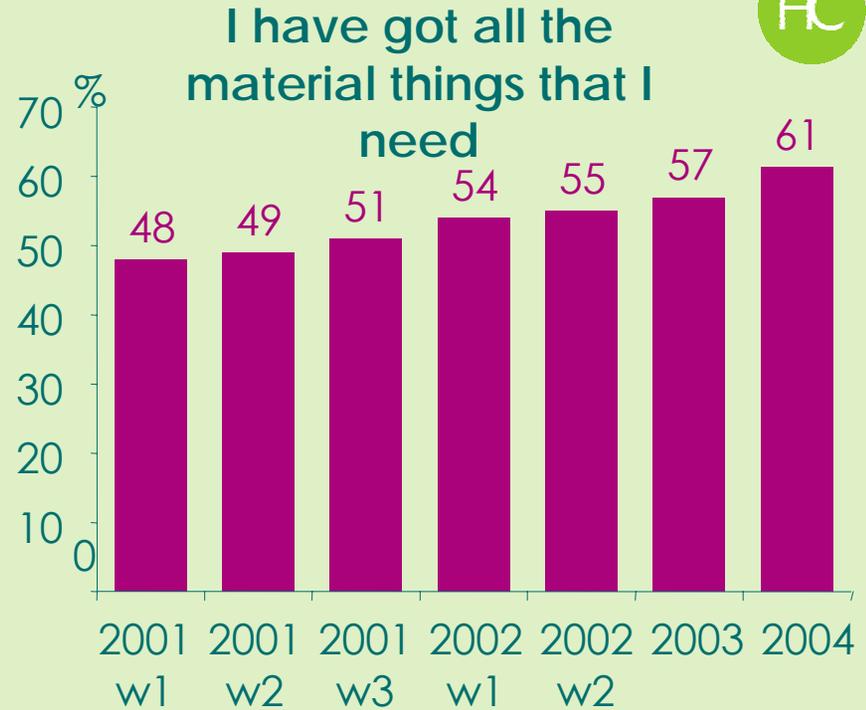
People expect to be able to arrange their business and leisure lives at the last minute and at any time

Experience economy

- **Britain is a mature economy:**
 - Desire for material things is being replaced by a desire for higher needs such as belonging, community and experiences

- **Rise in high adrenaline sports**

“More and more products are wrapped up as experiences...the experience the countryside provides will determine how well it competes...”



“Places with a sense of wilderness to be explored by those who seek adventure and challenge”

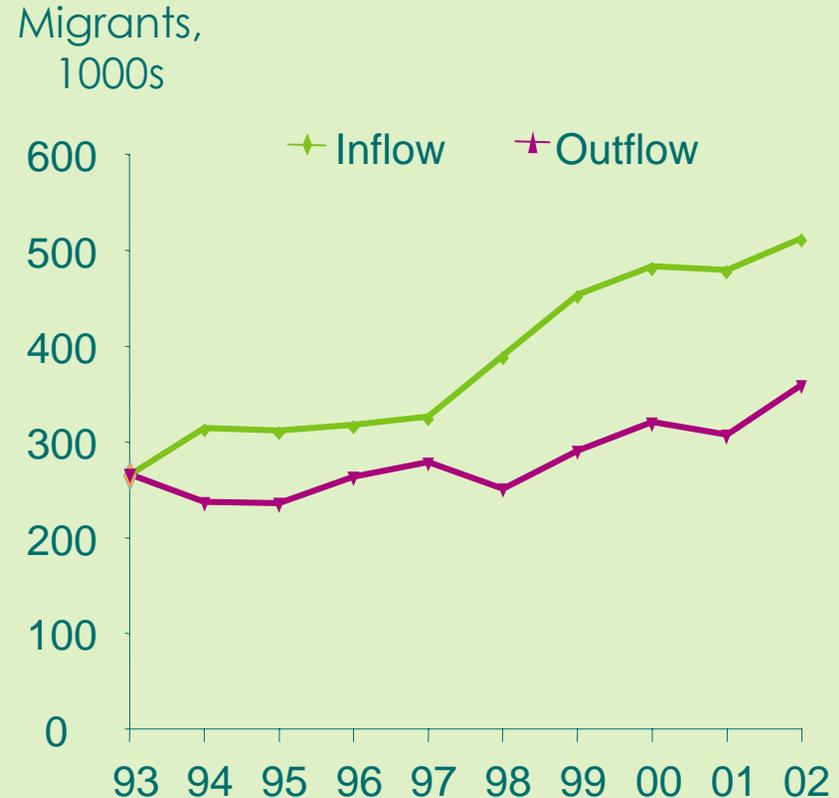
People increasingly seek experience over possessions
 Outdoor recreation offers a wide variety of experiences that satisfy this need

Increasing ethnic diversity

- More inwards migration
 - Europe is expanding Eastwards accounting for 220,000 migrants per year
- But there is limited countryside use from ethnic groups

“Those who are not of the traditional user group still feel unwelcome, whether from blatant prejudice of the locals or the lack of catering for ethnic groups (e.g. no places to worship / no halal meat).”

Migration to and from the UK



Increasing numbers of immigrants in the UK

More people who have not grown up in the UK and may not know what outdoor recreation has to offer and where is best to do go for it.

Rise of single issue politics

- Confidence in traditional institutions has been falling
- There is greater engagement with single issue politics
 - People are more inclined to get personally involved in single issues that are closer to their interests

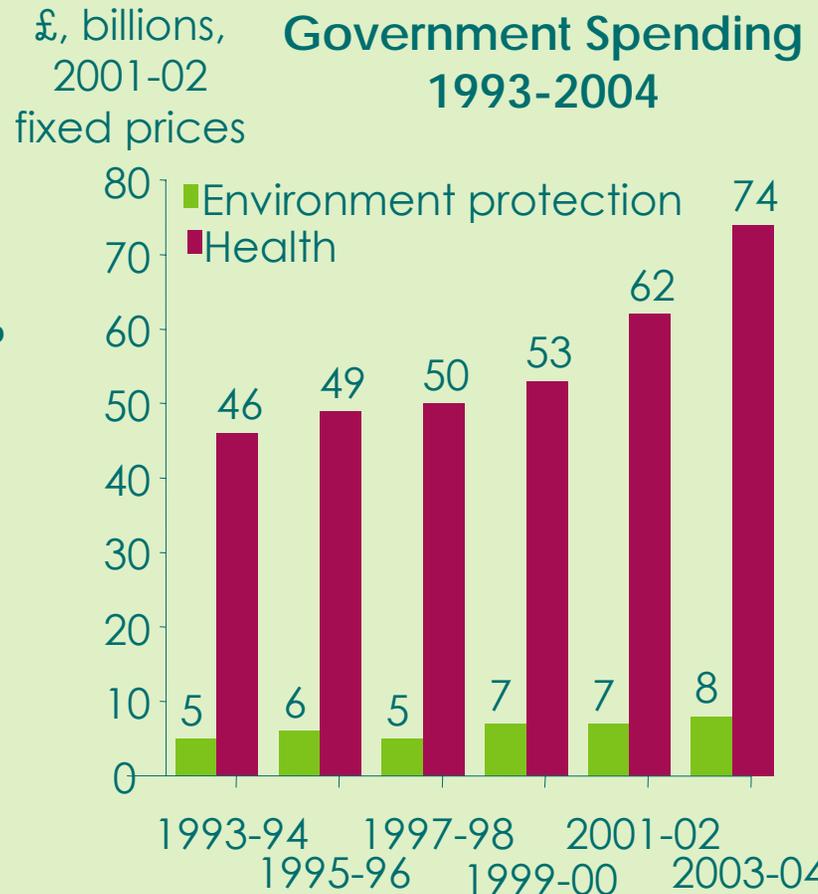


Declining trust in organisations has prompted greater involvement in single issues

This encourages people to take an active interest in the environment and agricultural world

Priorities in public spending

- **Public demand for better public service**
 - Financially pressurised government
- **Taxes set to remain around 41-42% of GDP**
 - much lower than rest of Western Europe (e.g. 60% in Sweden)
- **Yet continued importance of environment and health:**
 - Economic as well as social impact of the two sectors recognised more readily



Continued financial pressure on government

Recognition of health and environment priorities in which outdoor recreation has a part to play

- The natural world is changing rapidly
 - Oil production is likely to peak by the end of the decade, with current costs at a high of \$60.46 per barrel June 2005
- There is a greater public feeling of responsibility
 - 79% believe human beings are primarily responsible for climate change

66% of the population are prepared to pay more for renewable power



91% Britons now recycle
ICM / Observer poll, June 2005

People are increasingly aware of the environmental agenda

This has the potential to encourage people to spend more time caring for and appreciating the natural world

Global warming

- **Climate change:**

- 0.5°C temperature rise in the last 150 years is having an impact e.g. flash floods

- **Future effect on outdoors environment:**

- Ecological instability and shift in species distribution
- Quality of life

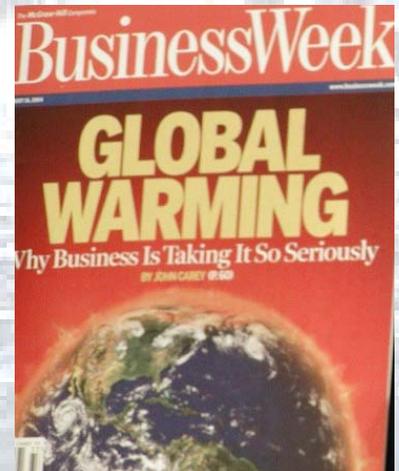
- **Countering the trend politically:**

“The growing evidence of climate change is forcing attention on carbon emissions and their reduction.”

Gordon Brown, March 2005

“It could go either way...an increase in droughts will affect water related recreation but on the other hand hotter weather may encourage people to get out more or take their holidays in the UK”

Henley Centre interview, 2005



Global warming is a future reality to face

The importance of preparation for its physical effects on the country and people's attitudes to the outdoor environment

Diversification and CAP reform

- **Rural Enterprise Scheme**
 - Encourages diversification of traditional farm businesses
- **Agri-environment schemes** whereby farmers receive funding for maintenance of land:
 - Countryside Stewardship Scheme
 - Woodland Grant Scheme
- **Wildlife tourism**
 - Forges both new revenue for farmers and promotes outdoor recreation

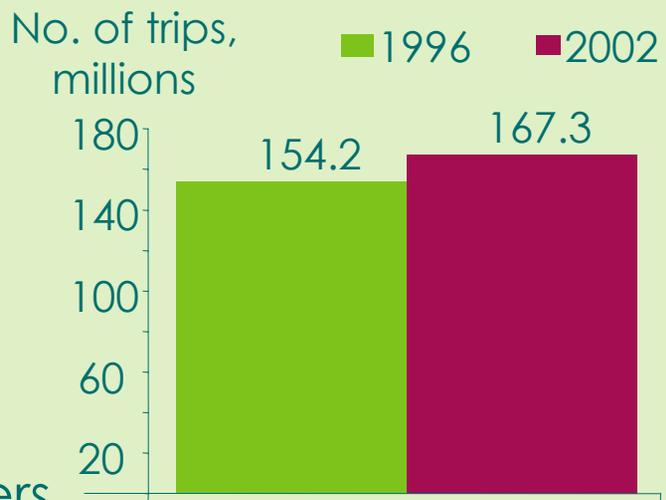


CAP reform could change the way the countryside works
A shift from production to outdoor recreation and tourism

Fragmentation of leisure

- Expansion of the tourism industry leads to greater diversification of leisure
- There has been a rise in niche activities
 - power gliding, jet-skiing, advanced mountain biking activities
- Tides of 'fad interests'
 - 'all terrain boarding'
- Potential conflicts added to current tensions
 - Anglers : canoeists, Horse-riders : ramblers

No. of Leisure trips taken by UK citizens to the regional tourist boards



Outdoor recreation has become more fragmented
 People are demanding more variety of outdoor activity

Growing tensions of transport infrastructure



- Cars are a key means of access to the countryside
- Disadvantages of car usage:
 - Longer traffic jams, a crisis for rural economy'
 - Pollution and noise which can reach 90 decibels
- Addressing the issues:
 - Expanded, reliable public transport service e.g. high speed rail links
 - Road pricing and tolls to dissuade car use
 - Intelligent Vehicle Highway systems

Leisure day trippers more likely to come from car-owning families:
17% of trip-takers are from non-car owning families, though they represent 20% of the population

"The hum of insects birdsong and the gentle rustling of leaves in the trees can be drowned out by traffic noise"
Rural Routes and Networks, ICE

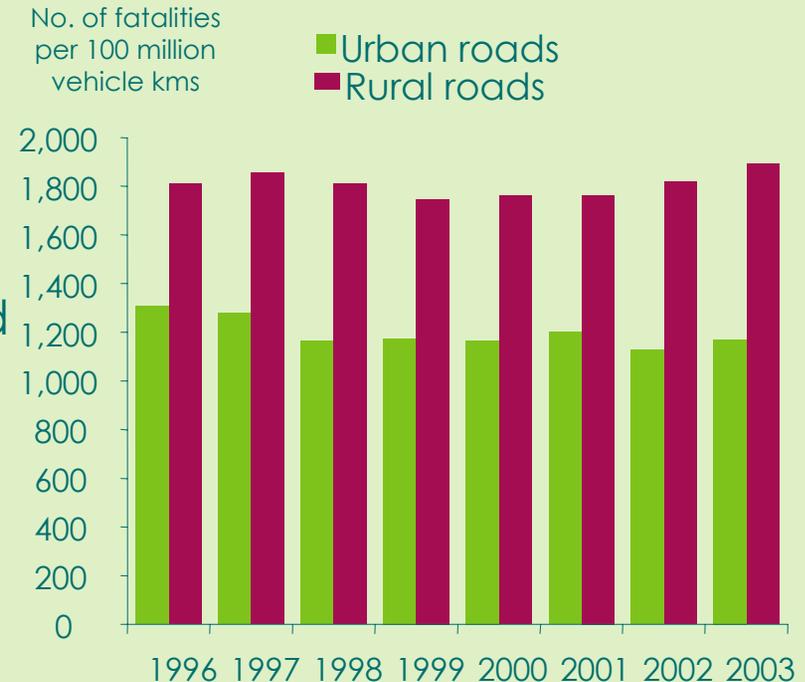
Cars facilitate access to outdoor recreation but have the potential to reduce the quality of the experience
The importance of balancing access and quality

Road safety



- **More traffic:**
 - Motorised traffic has risen by 1000% in the last 50 years
- **Dangers in the countryside:**
 - Over 60% of fatal accidents on A roads take place in rural areas
- **Disincentive:**
 - To walkers, cyclists, horse riders and those considering outdoor recreation
- **Motor-traffic-free zones:**
 - National Cycle Networks
 - Greenways
 - 'Quiet Lanes'

Fatalities on the road 1996-2003



Growth in speed and volume of traffic - dangerous roads
Motor-traffic-free zones offer a safe and quieter means of enjoying outdoor recreation

Changing urban landscape

- **Brownfield sites:**

- Government's target of 60% of new housing built here
- New landscapes e.g. Thames Gateway



- **Green Belt policy:**

- Prevents sprawl but no provision for land enhancement

- **Airport expansion:**

- Government predicts a rise in British aircraft passengers from 180 million to 476 million over the next 25 years

Thames



Eastern Nottingham

The urban environment is changing

Opportunities to shape development to allow for venues for outdoor recreation and access to the countryside

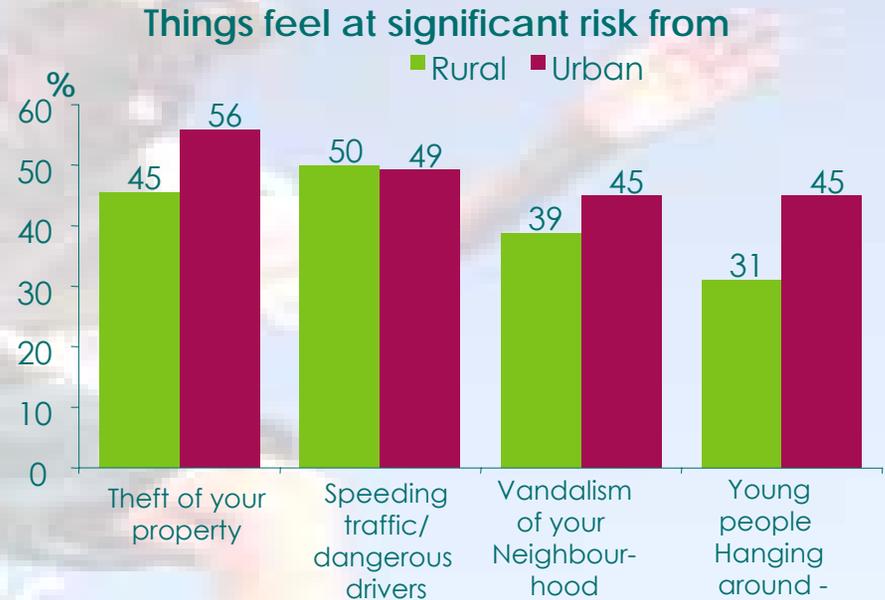
Changing perceptions of risk

- Heightened sense of risk:

- Push for more formalised / regulated activities
- Health & Safety regulations
- Disparities in rural : urban fears

- Specific outdoors recreation issues:

- Criminal activity in parks
- Disease e.g. BSE, FMD
- Abandoned mines / quarries



Risk everywhere: home-made craft materials under threat:

"A primary school at Lewes in East Sussex has banned [lool-roll] tubes and egg boxes after health officials said they could contain harmful bacteria."

Increasing concerns around safety and sensitivity to risk

Outdoors recreation presents a variety of risks to participants

Balance of conservation to recreation

- **Vulnerable sites**

- SSSIs, SACs, SPAs
- Honey pot areas sometimes encouraged to dissuade people from using more sensitive areas for recreation

- **Archaeological considerations**

- **Environmental stewardship:**

- Land management
- Subtlety of road markings and traffic calming devices
- Use of trees, hedges, verges
- Locally sourced stone for walls

“Leisure and tourism do not cause significant widespread ecological damage to the countryside. However there is no need for complacency.”



“Drystone walls are frequently wildlife gardens in miniature”

The CRoW Act 2000 contains measures to increase protection of SSSIs



Recreation creates the potential for ecological damage

A mutually beneficial balance between conservation and recreation is sought

Future of planning structures

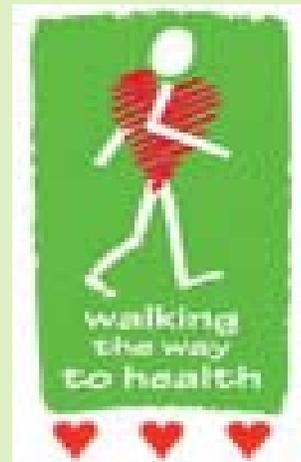
- **Devolution vs Brussels:**

- Greater flexibility at the local level, facilitated by the Planning and Compulsory Purchase Act 2004
- Extension of EU control

- **Working in partnership:**

- Local Access Forums and Placechecks
- Parish plans
- REACT (Countryside Agency with local PCTs)

“A placecheck can start small: with half a dozen people round a kitchen table, or a small group meeting on a street corner”



“Working closely with stakeholders and partners is so important...it avoids the negative image of ‘laying down the law’”

Henley interview, 2005

Uncertainty surrounding the future decision makers for planning and development

Partnership a key component of any future planning structure

Sustainable communities

- **Accelerated population in rural areas:**
 - 28% of the population currently live in a rural area
- **Need for housing and services in rural areas:**
 - The *Urban White Paper and Sustainable Communities Plan* sets out an ambitious agenda for new housing
- **Habitats**
 - Housing developments can threaten natural habitats and valuable areas for outdoor recreation

Between 1981 and 2000 the population of rural areas grew 3 times faster than that of urban areas

“There is considerable evidence that a shortage of housing exists in the UK”
K. Baker, Review of Housing Supply

Growing need for housing and services in rural areas
 This will change the face of the rural environment and delivery of outdoor recreation

Increasing access

- **CRoW Act 2000**
 - ‘Historic footpaths and bridleways’ to be published by 2026
- **Paying for access**
 - Horse riders’ fee for toll-rides
 - Car parking charges
- **Disability Discrimination Act 1995**
 - Physical barriers to disabled
 - Stiles, gates, fencing
 - Availability of scooters for disabled

CRoW will give the public a right of access on foot over approximately 1 million hectares of land in England
Access Management Grant Scheme



Increasing access into areas of outdoor recreation

Implications for land management / charging for outdoors facilities

Social inclusion

- **Polarisation of incomes:**
 - The rich are getting richer and the poor, poorer
- **Growing disparities in participation of outdoor recreation:**
 - 55% of ABC1s have taken a leisure trip in the past 2 weeks, compared with 44% of C2DEs*
- **Growing political will:**
 - “By 2005, we will carry out a full diversity review of how we can encourage...more people from inner cities to visit the countryside and participate in country activities.” Rural White Paper, 2000

% share of total income by household



* The split in population for ABC1 : C2DE is 51 : 47

“There are no expensive gym subscriptions or high tech exercise equipment”

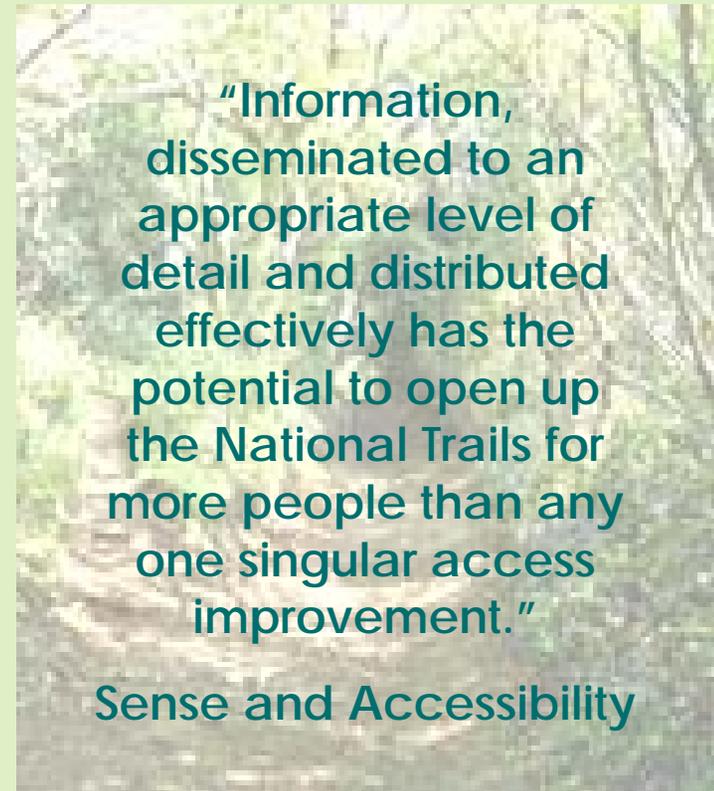
Therapi

Social exclusion in outdoor recreation

Greater income disparity leading to outdoor recreation dominated by higher income groups

Availability of information

- **Need to be clear and understandable**
 - CSS promotion of permissive access with circular routes in step by step guides
- **Detail crucial for disabled users**
 - Need to know where stiles or equivalent barriers lie
 - Multiple formats required e.g. large print / audio
- **Lack of confidence a significant psychological barrier:**
 - Perceived lack of skill can be overcome with information



Information is key to involvement

The distribution and quality of information about outdoors recreation

Retuned to nature

- **Climate of media overload:**

- There are now over 8 billion websites
- The average supermarket stocks 40,000 lines

- **Nature as means of escape:**

- ‘Biophilia Hypothesis’ maintains that the desire for contact with nature is partly innate

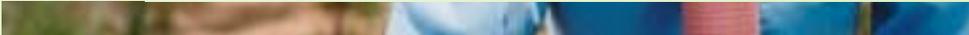
- **Healing effects of nature**

- Ulrich study finds that a patient with a view of a tree or park from his/her window recovers more quickly than those with a brick wall



“People have an affinity with nature that is positive and healing”

Therapi Project publication



“Sometimes you need to just get away from it all”

Henley Centre executive interviews, 2005

People crave nature as relief from the complexity and clamour of life

Recreating outdoors allows people to fulfil this deep-seated desire

Wellbeing

- Energy deficit:

- 52% of people agreed 'I am so tired in the evenings I often don't have the energy to do much' compared with 46% in 2001

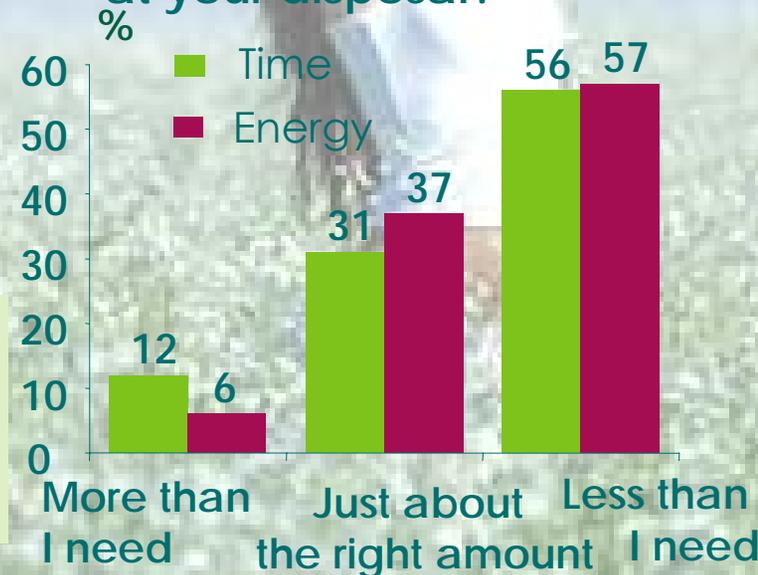
- Quality of life:

- Outdoor recreation contributes to self esteem and provides inspiration

"Exercising outdoors.... makes you less angry, confused, tense, tired and depressed"

"The countryside provides people with that vital sense of freedom and escape from the pressures of everyday life"

How much or how little of each of these resources you feel you have at your disposal?



The increasing focus on the importance of wellbeing and quality of life

Declining mental health

- **Rising cases of mental ill health:**
 - Reports of emotional and hyperactive problems in children have over doubled between 1974 and 1999 from 6.4% to 14%
- **Dramatic increase in drugs consumption:**
 - Between 1991 and 2000 expenditure on anti-depressants rose from 15 million to 395 million
- **Being outdoors as an antidote:**
 - Kaplan's evidence suggests that green spaces reduce the effects of Attention Deficit Disorder



The nation's mental health is in decline
Outdoors recreation can be used as a means of reversing this trend

Drive to greater activity and health

- **Unhealthy nation:**
 - 1 in 5 UK adults are clinically obese and by 2020 this figure is likely to be 1 in 3
- **Significant cost of physical inactivity** is estimated at £8bn
- **Physical Activity Plan** launched by Government to tackle the problem
- **Green exercise:**
 - Brisk walking reduces risk of heart disease and people maintain a better commitment to exercise if takes place in a leafy environment

“Research shows that children actually don’t eat any differently from the way they did 20 or 30 years ago...The difference is that they’re not taking any exercise now, they’re not playing in the street, they’re not riding their bicycles, not walking to school – they’re sitting, playing computer games and being driven.”

Dr Dee Dawson, Medical Director of the Rhodes Farm Clinic for Eating Disorders

Need to tackle the nation’s deteriorating health

Exercise outdoors is suggested as a key solution to this socially and economically destructive trend

Communal yearning

- Countryside provides meaning:
 - Associated with traditional life and crafts
 - Time to think
- Sharing a park / countryside provides identity:
 - A sense of belonging
 - The ETHNOS report found that walking in countryside reminds people of ‘ being back home ’

“A strong sense of community has traditionally been the stuff of the countryside. Rural communities are still widely regarded as more vibrant...”

The state of the Countryside in 2020

“Getting outside gives you time to reflect on the day’s work and make sense of it all”
 Henley Centre interview, 2005

There is an increasing desire for community

The countryside and shared outdoor spaces create a sense of belonging



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