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Wales**

Welsh Outdoor Recreation Survey

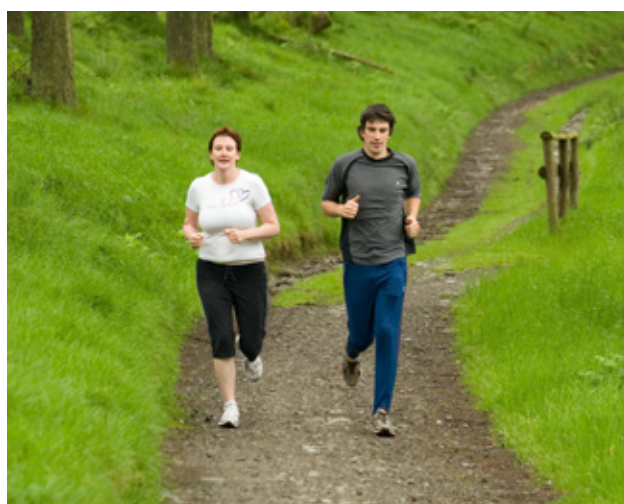
Key Facts for Policy and Practice:
Summary Report



Noddir gan
Lywodraeth Cymru
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This Summary Report is supported by a comprehensive Full Report and Technical Report. These, along with full data tables, are available to download from the NRW website.

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Introduction

What do we know about outdoor recreation in Wales? We've all seen people out and about, playing on the beach, hiking in the hills, or walking the dog, so why have a national survey on outdoor activities?

The Welsh Outdoor Recreation Survey helps us answer many questions that we can't find out about from what we see 'on the ground'. It provides robust evidence on:

- exactly how many people use the outdoors, and how often they visit
- the activities that people currently do and the places they visit
- their barriers and motivations
- whether participation is changing, and what people would like to do in the future
- the health and economic benefits of outdoor recreation
- how much people care about the environment

This Summary Report highlights the key results of the survey, and provides a summary of the main issues for policy and practice.

Welsh Outdoor Recreation Survey

This summary report is based on the results of the 2014/15 Welsh Outdoor Recreation Survey, commissioned by Natural Resources Wales. It also includes data from the 2011 and 2008 surveys (undertaken by the Countryside Council for Wales and Forestry Commission Wales). It is the largest survey of participation in outdoor recreation by people living in Wales. It is representative of the adult population, covering all areas in both towns and countryside, along with all ages and backgrounds. The interviews were conducted over a 12 month period, so take account of any seasonal differences in participation.

This Summary Report is supported by a Full Report and Technical Report, which are available to download from the NRW website.

Who participates in outdoor recreation?

One of the key questions asked by the survey was who takes part in outdoor recreation? And the clear answer was ...

most people do!

Overall, we found that 93% of adults in Wales have taken part in some type of outdoor recreation at least once in the last year.

Part of the reason that this figure is so high is because it includes so many different activities and places ... everything from climbing amongst the high mountain tops, to having a picnic on the beach, or taking children to the local playground.

BUT ... although it is good that so many people make use of the outdoors, there are some significant challenges.

Although most people have taken part in outdoor recreation occasionally, far fewer take part on a more regular basis ...

only 22% of people are frequent participants.

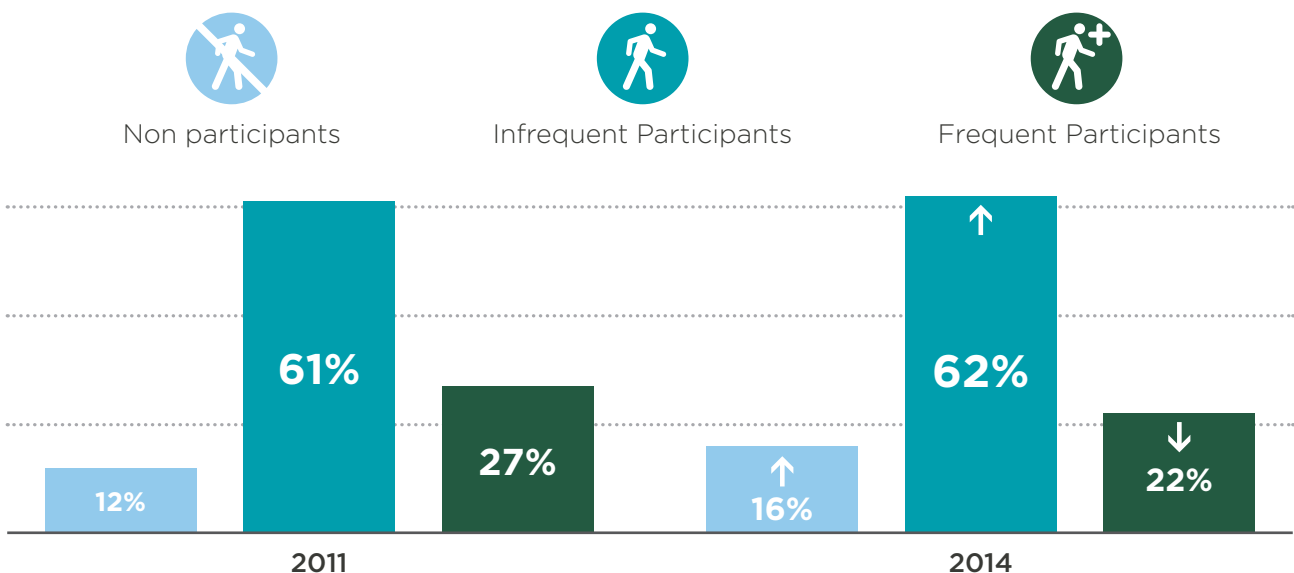
In 2014, frequent participation has declined – there has been significant decrease in the overall level and frequency of visits to outdoors since 2011, down from 27% to 22%.

A key challenge is to understand why frequent participation has declined, and to find ways of

increasing the frequency

of participation to get more people out there enjoying the outdoors on a regular basis.

■ Graphic 1. Who participates? Most people do, but not frequently



Note: numbers are percentages of the total Welsh adult population in each frequency group eg: in 2014, 22% of adults in Wales were frequent participants

Who participates in outdoor recreation?

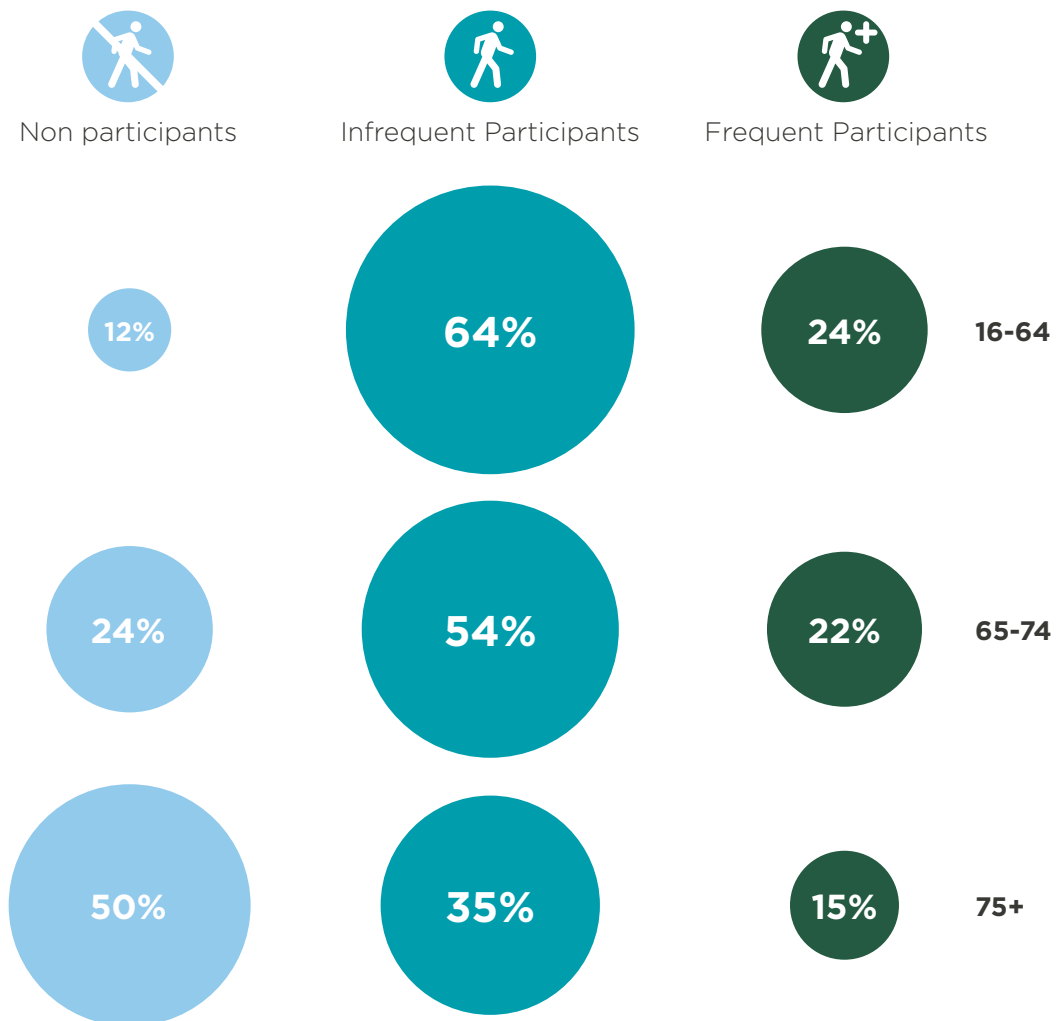
Equality of opportunity is important in all aspects of life, and participation in outdoor recreation is no exception. So we looked at the relative participation from different groups in society, and found that ...

who you are is more important than where you live.

Overall, the lowest levels of participation were from *older people* (especially those over 75) who also have a *disability*.

There was little difference between the demographic profile of 'infrequent' and 'frequent' participants, with the exception of having a dog. Frequent visitors were almost twice as likely to own or care for a dog (59%), compared to infrequent visitors (32%).

■ Graphic 2. Age has the greatest impact on participation



Note: numbers are percentages of each demographic group in each frequency group
eg: 24% of 16-64 year olds were frequent participants

Who participates in outdoor recreation?

“I wandered lonely as a cloud ...”

Wordsworth’s poem still evokes a sense of walking over the hills in solitude, but is that the reality for outdoor recreation today?

The survey found that outdoor recreation is more of a **social activity** nowadays. The majority of people visited the outdoors with either their family or friends, with just over a quarter of visits (26%) also being made with children. But there has been a significant decrease in the number of visits made with family members.

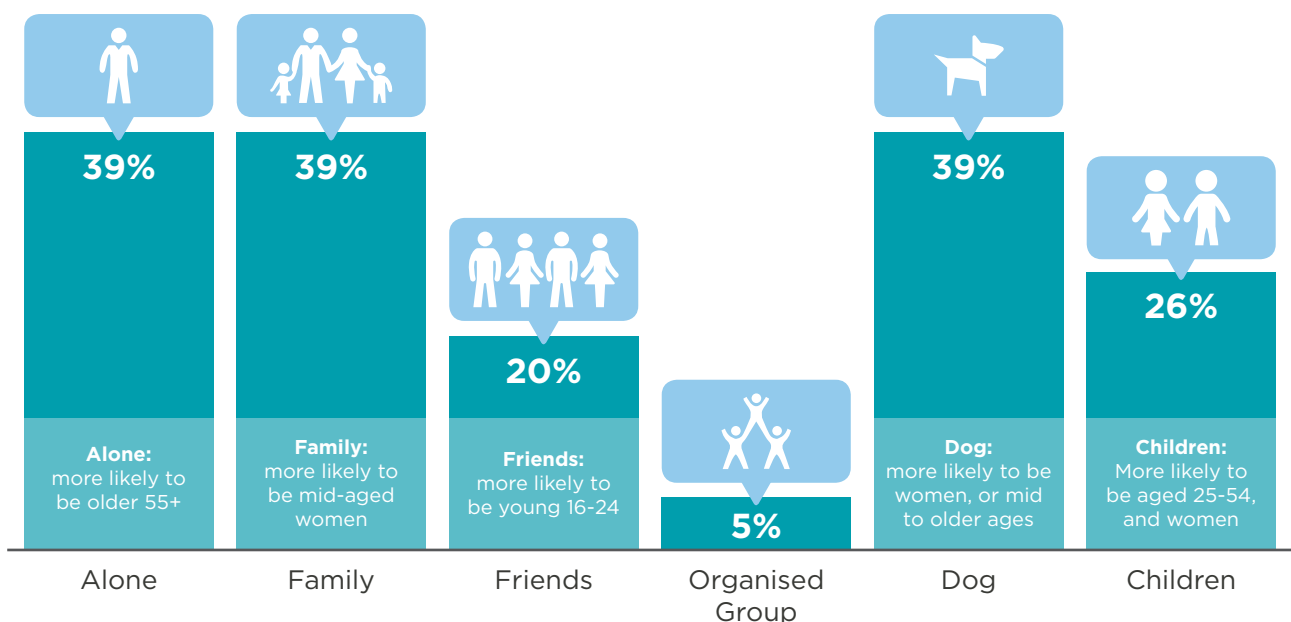
There has been a slight increase in the number of solo trips, with over a third of visits made by people on their own. But only a few visits were made as part of an organised group, raising some challenges as to **how can we communicate with outdoor users** especially in relation to responsible behaviour.

It would also appear that **“man’s best friend”** is a regular companion, with 39% of visits being made by people with a dog. We did find that women and middle-aged to older people were more likely to have a dog with them, possibly providing companionship or a sense of safety.

Age has a particularly strong influence: young adults are much more likely to visit with friends, and middle-aged women to go out with their family. Older people are more likely to go on their own – but is this by choice or circumstance?

We need to take greater account of the visits made by people with a dog, families with children, older people on their own, and groups of friends. What are their needs and barriers? What do they want to do and where to they want to go?

■ **Graphic 3. Outdoor Recreation is a Social Activity**



Note: numbers are percentages of all visits eg: 26% of all visits were made with children

What People Do

Traditionally, outdoor recreation has been seen as ‘countryside’ activities, largely involving pursuits such as hillwalking or climbing. These activities are still very important types of outdoor recreation, but increasingly we have come to understand that it’s not all about woolly socks and mountains ...

People enjoy the outdoors in many different ways, and we tried to incorporate this diversity into the survey, measuring participation in 19 different activities from playing games and picnics, to watersports and horseriding. But increasingly

people don’t just do one activity, they are ‘multi-activity’.

We found that the majority of people take part in ‘low input’ activities. These are things that are easy to do, require few skills or equipment, take little physical effort, and are convenient to access. They include activities like walking, sightseeing, taking children to playgrounds, picnicking, playing informal games, and watching wildlife.

There are also a substantial number of people taking part in more active pursuits, especially running, road cycling, outdoor swimming, or mountain biking. These are increasingly popular, often as a ‘lifestyle’ activity.

In contrast, there are relatively low levels of participation in most ‘traditional’ forms of recreation, such as fishing, climbing, and horseriding.

Activities included in the Welsh Outdoor Recreation Survey ...

- Walking (short walks; hill walks)
- Road cycling
- Mountain biking
- Horse riding
- Fishing
- Climbing or Caving
- Motorised Watersports
- Non-motorised Watersports
- Outdoor Swimming
- Snowsports
- Wildlife Watching
- Running
- Sightseeing
- Off-road driving
- Picnicking
- Visiting children’s Playgrounds
- Informal Games (Frisbee etc)
- Field Sports
- Air sports

What People Do

Are people changing what activities they do?

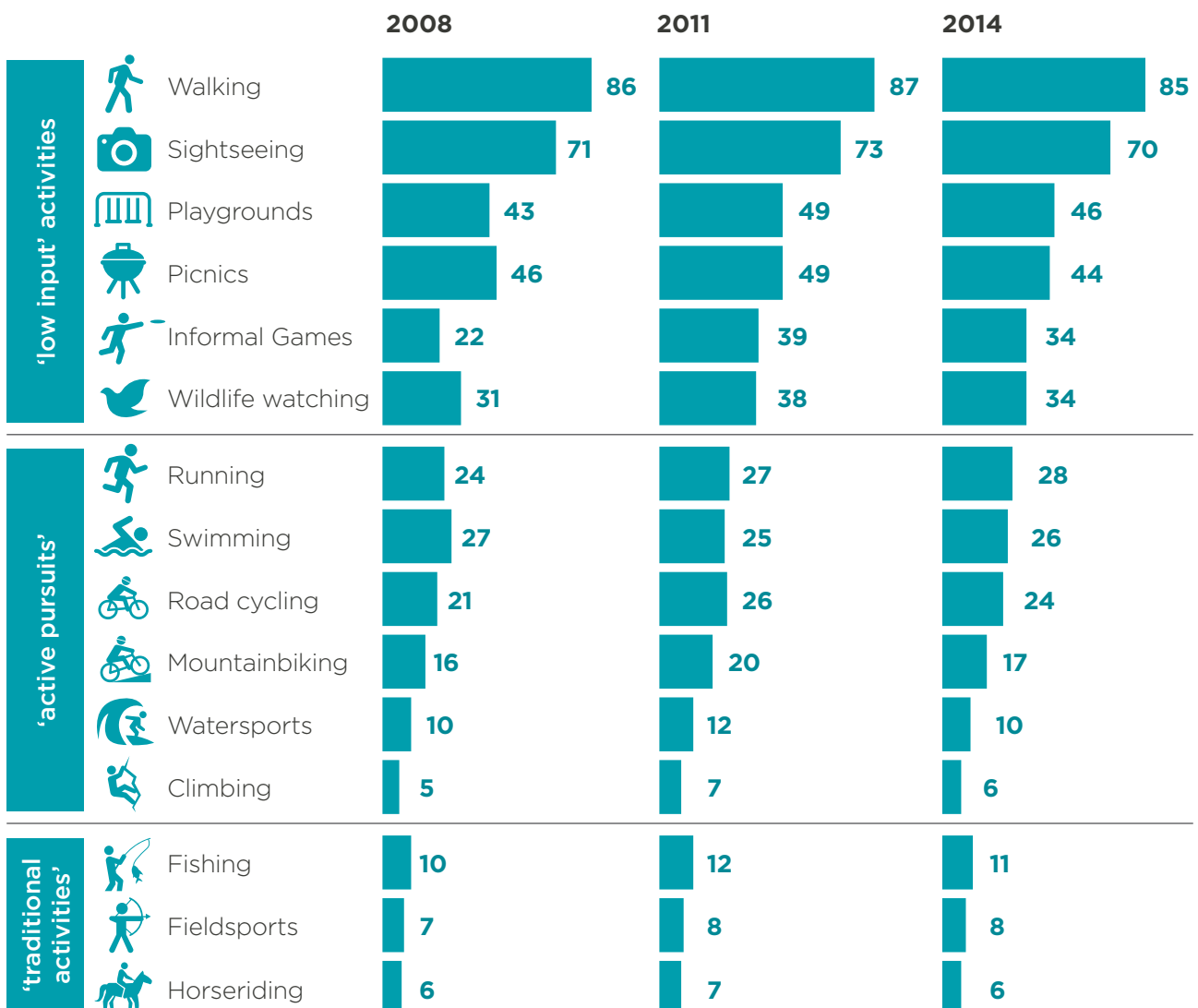
The survey found that participation in most activities has fluctuated over the years:

- There had been a decline in participation in a number of activities compared to their 'peak' in 2011, but the 2014 results still show an increase compared to 2008
- The only exception is running, which has shown a clear trend of increasing participation from 2008 and 2011 to 2014.

So what does that tell us?

On the whole, the survey shows that participation in specific activities has gone up and down over the years. This can make it hard to plan for future demand, which means that it is important that outdoor recreation opportunities are flexible and have the potential to support a changing diversity of activities.

■ Graphic 4. Changes in outdoor activities (undertaken in the last 12 months)



(Not all of these changes are significant)

Note: numbers are a percentage of the total adult population in Wales eg: in 2014, 28% of adults went running at least once in the last 12 months

Where People Go

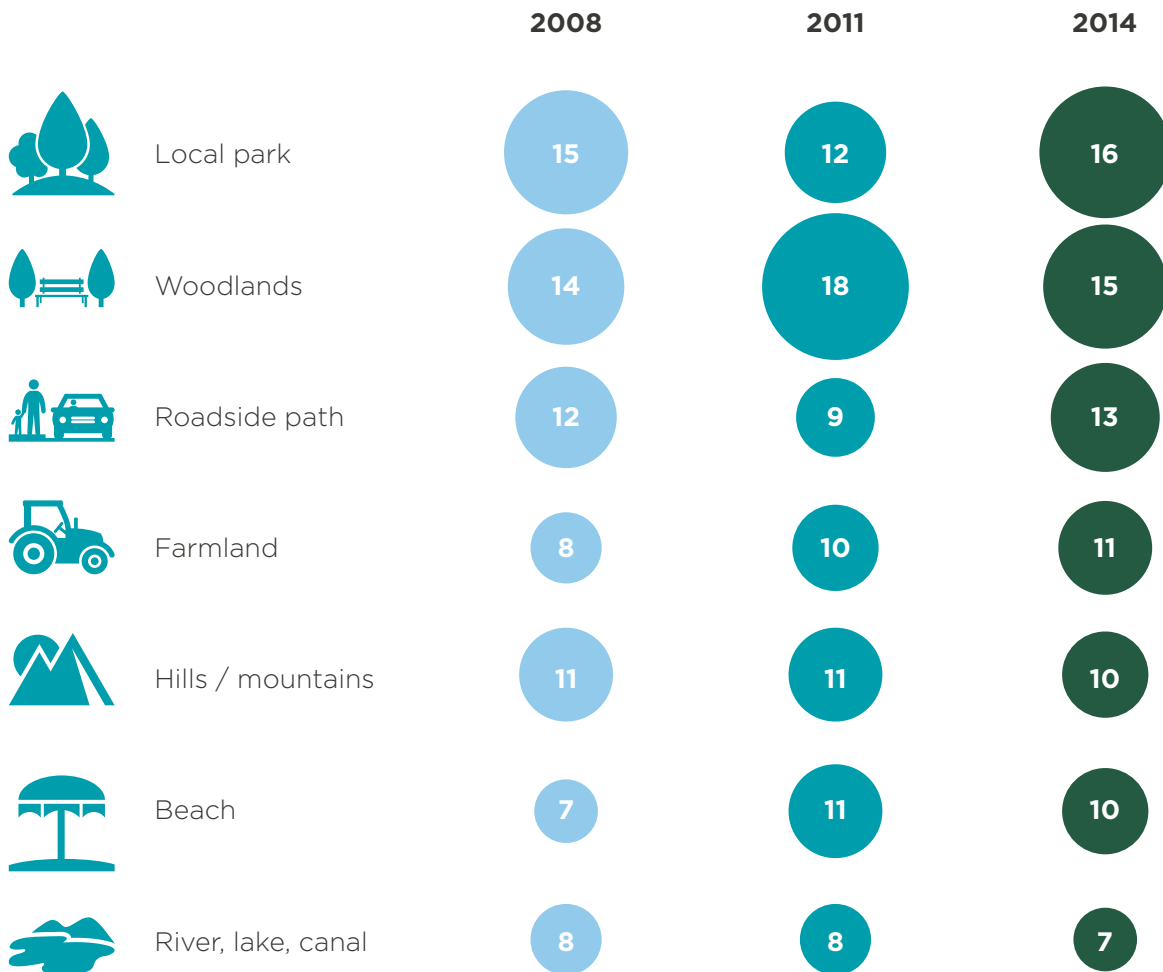
The ‘outdoors’ means different things to different people, from the wild mountains to more developed parks, and covers both land and water. So as well as broadening the definition of outdoor recreation to include all informal outdoor activities, the survey also included a wide range of places.

The most commonly visited places were local parks or woodlands and forests, with a smaller number of people visiting hills and moors, beaches, and farmland. ‘Bluespace’ was less visited, with fewer visits to inland water such as lakes and rivers, and the sea.

There has been little overall change in the types of places that people visit:

Local Parks and Woodlands / Forests have consistently been the ‘top two’ destinations from 2008 to 2014.

■ Graphic 5. Changes in the places people visit



Note: numbers are a percentage of all visits to each type of place eg: in 2014, 16% of all visits were to local parks

Where People Go

So why do people choose to go to different places?

Proximity? Activities? Facilities? Ease of Use?

The survey found that the pattern of recreation visits has changed:

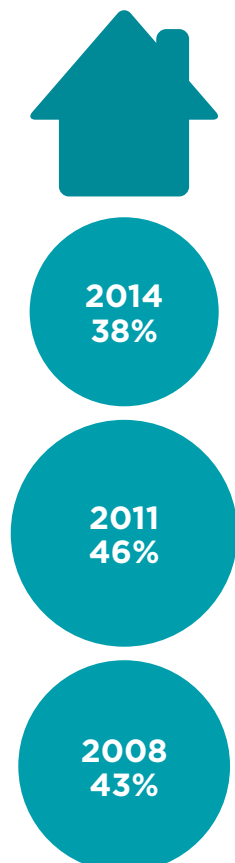
- There has been a decrease in visits that are closest to home
- Despite this, there has been an increase in people who walk to their destination, and a decrease in people using a car
- There has also been a decline in short duration visits of less than 1 hour

Overall, people still take part in outdoor recreation in 'bite-sized' chunks, which are short duration and close to home, but this appears to be changing.

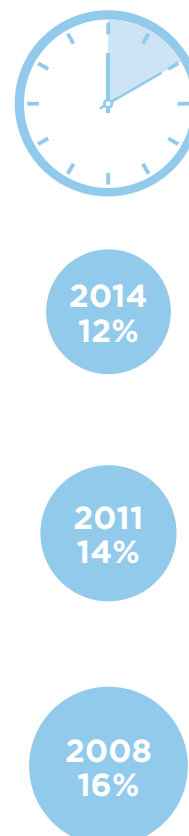
We need to do more work to understand why there are fewer short duration, close to home 'doorstep visits'.

■ Graphic 6. Changes to 'doorstep visits'

Decrease in 'close to home' visits



Decrease in 'short duration' visits



Note: numbers are a percentage of all visits eg: in 2014, 38% of visits were close to home

Section 5:

Why and Why Not: the Motivations and Barriers to Outdoor Recreation

So why do some people take part in outdoor recreation, whilst others don't? Understanding both motivations and barriers is crucial. It can help us target our messages to different groups, encourage greater participation, and provide more appropriate access opportunities.

The survey asked people why they took part in their most recent outdoor activity,

the most commonly mentioned motivation was for 'health and exercise'.

Functional and practical motivations were also frequently mentioned, with the need to walk the dog mentioned by a quarter of people. Whilst for others their main motivation was to take part in their specific hobby or activity.

Motivations associated with the pleasurable aspects of the outdoors focused on fresh air and enjoyment, but surprisingly scenery and wildlife were not strong motivations for many people.

We found that people's motivations varied depending on their age, gender, and the places they visited. In particular:

- Older people (over 55) are noticeably likely to be motivated by 'health and exercise'
- Men have a particular focus on enjoying a specific hobby, whereas women are more likely to visit the outdoors to entertain children
- Woodlands and rivers / canals are particularly appealing to people whose main motivation is to walk their dog
- In contrast, local parks appeal to people whose main reason for being outdoors is to entertain children
- Whereas visits to the beach are more likely to be done just for enjoyment and to take advantage of good weather

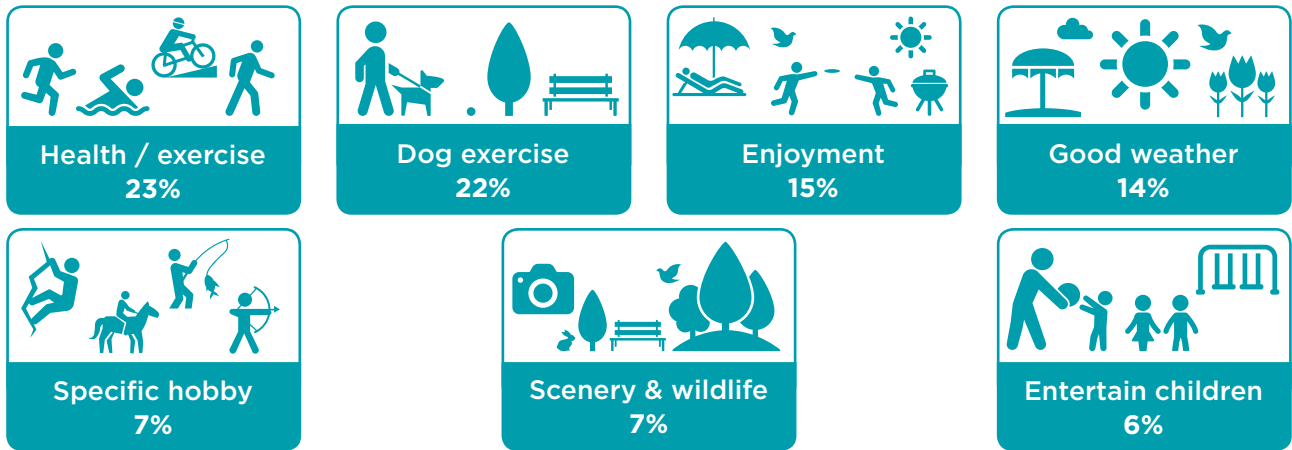
Understanding how motivations differ by age, gender and places will make our interventions more relevant and help increase participation.

Why and Why Not: the Motivations and Barriers to Outdoor Recreation

Graphic 7. Variations in Motivations

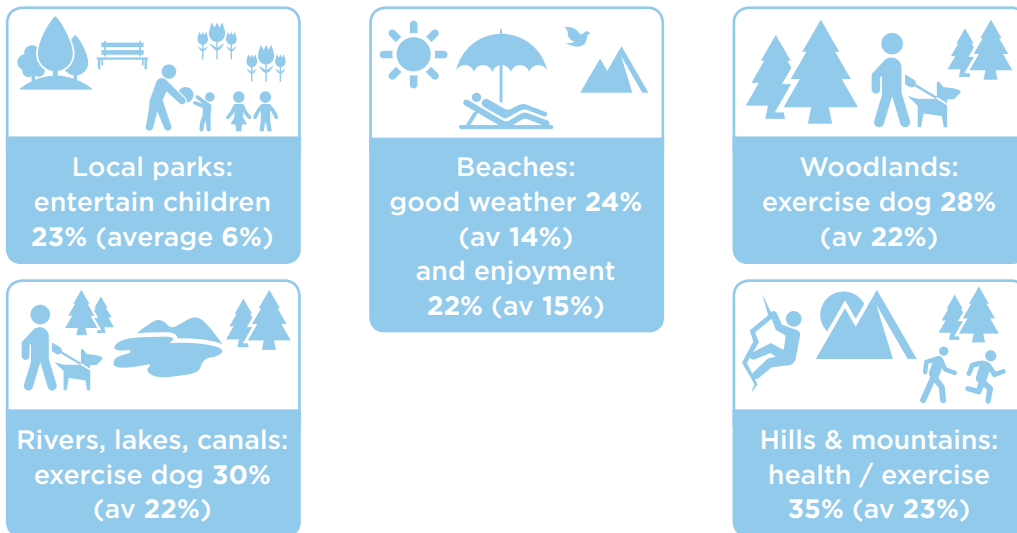
Variations in motivations for visiting the outdoors

Note: numbers are a percentage of all visits
eg: health / exercise was stated as a motivation for 23% of visits



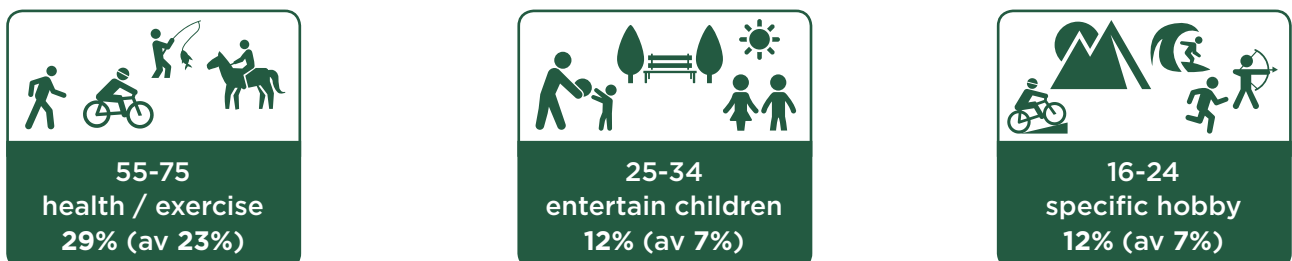
Differences by places visited: more likely to be motivated by . . .

Note: numbers are a percentage of visits to specific places, compared to the average
eg: 35% of visits to hills / mountains were motivated by health / exercise



Differences by age: more likely to be motivated by . . .

Note: numbers are a percentage of visits made by specific age groups
eg: 12% of visits made by 16-24 year olds were motivated by a specific hobby



Why and Why Not: the Motivations and Barriers to Outdoor Recreation

So why do some people not take part in outdoor recreation?

What, if anything, stops them? Or are they just not interested?

It is equally important to understanding people’s behaviour to find out why people don’t take part in outdoor recreation. The survey asked both why people never took part (those who hadn’t visited the outdoors in the last 12 months) and why people rarely took part (those who hadn’t visited in the last 4 weeks).

We found that those who never took part had more absolute barriers, a challenging combination of:

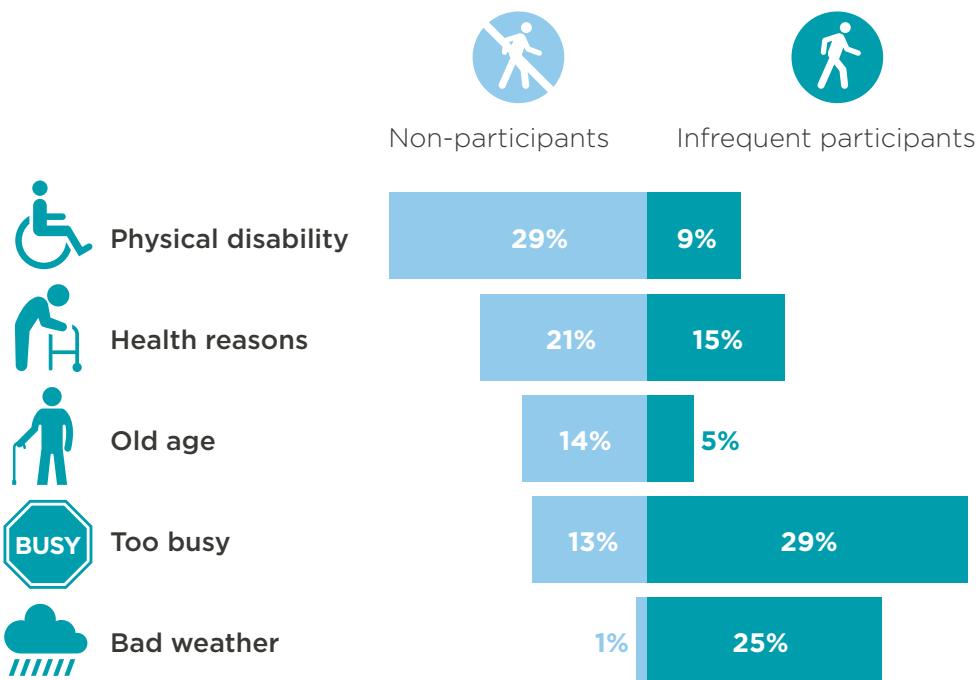
Old Age + Disability + Poor Health

In contrast, rare participants expressed more opportunity barriers, with a combination of:

Lack of Time + Bad Weather

However, the main aspects that we have traditionally addressed, such as a lack of information or places to go, along with cost or transport issues, were rarely mentioned as barriers.

■ Graphic 8. Variations in Barriers



Note: numbers are a percentage of non-participants / infrequent participants eg: 25% of infrequent participants stated that bad weather was a barrier

Focus on Future Demand

Trying to understand, and predict, the future for outdoor recreation is obviously difficult. Like any changes in society, it can be subject to a wide range of different influences, many of which we can't foresee. However, the survey does give us an insight into what to expect in the short to medium term.

There are two main ways of trying to understand future demand. One is to look at past changes, and use these to predict what would happen if they continued. The second is to ask people what they would like to do in the future. With this survey we have been able to do both.

Looking back between 2014 and 2011, we have found that there have been some changes to outdoor recreation in the last 3 years. Although the overall level of participation hasn't changed, and people's motivations and barriers have remained relatively static, there are some differences in the frequency of participation along with a decrease in 'doorstep visits'.

The main changes in outdoor recreation:

- The *frequency* of participation has declined significantly with only 22% of adults visiting the outdoors frequently (defined as an average of 21 visits or more in the last 4 weeks), compared to 27% in 2011. The proportion of people who had not visited at all in the last 4 weeks has significantly increased to 16% (up from 12% in 2011)
- Short, close to home visits have also declined. There has been a decrease in very short duration activities of less than 1 hour - 23% in 2014, down from 25% in 2011 and 27% in 2008. There has also been a decrease in the percentage of 'doorstep' visits (destinations less than 1 mile from home), 38% in 2014, down from 46% in 2011
- There has been a decrease in family visits and an associated increase in the proportion of visits made by people on their own
- Although participation in most activities has gone up and down, there has been a clear increase in running

It is likely that the decline in frequency is due to the associated decrease in 'doorstep activity', as we know that people participate more often when it is easy to do and close to home. It might be that as people choose to do wider range of outdoor activities, they have to travel further to find suitable opportunities or facilities. The reason for the decline in family visits is less clearly understood, and will require further research.

Focus on Future Demand

We also asked people about *what they would like to do in the future*.

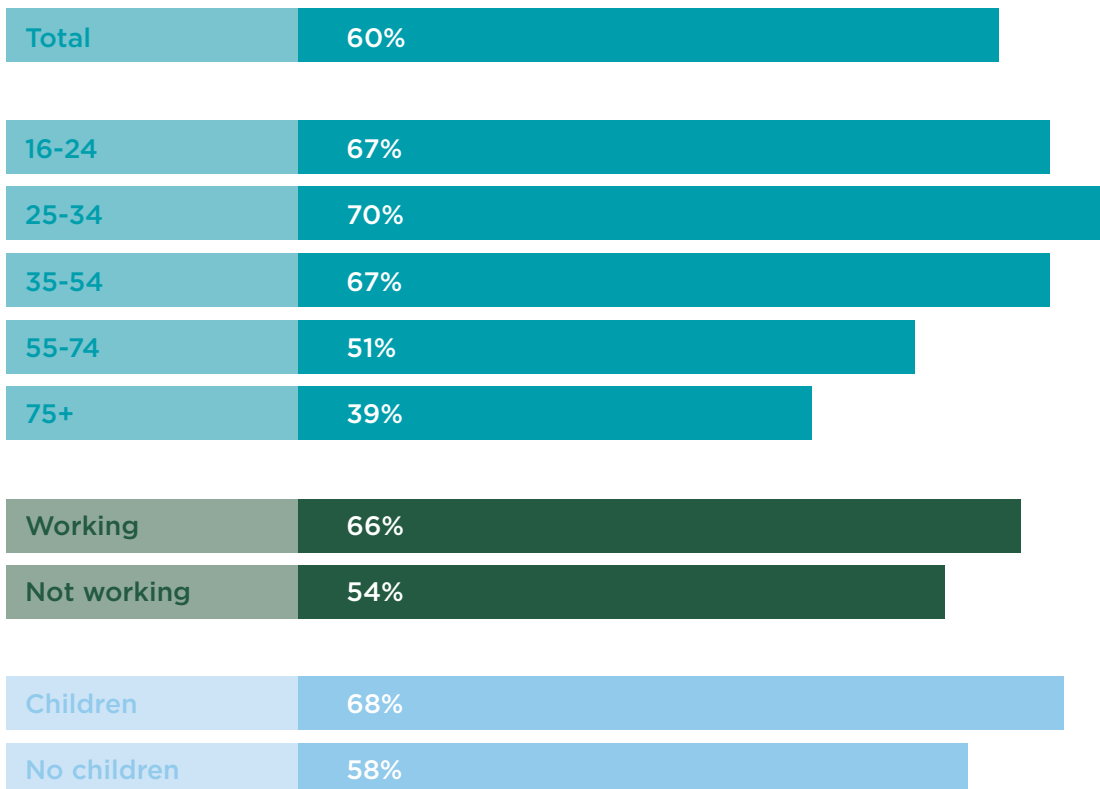
This gives us an insight into whether people would like to participate more, and if they do, what they would like to do and where they would like to go. Understanding these preferences will help us to decide what sort of facilities and opportunities to provide in the future.

The survey found that 60% of people would like to visit the outdoors more often.

What do we know about the people who have said they would like to do more? And how do they compare to those who don't want to participate more in the future? The highest levels of demand come from:

- Younger and middle-aged groups (from 16 – 54)
- People who are working
- Families with children

■ Graphic 9. Who would like to participate more in the future?



Note: numbers are a percentage of the total adult population in Wales eg: 67% of 16-24 year olds would like to participate more in the future

Focus on Future Demand

But what would all these people like to do in the future? As we have found with current participation, there isn't a single activity, but rather there are many different outdoor pursuits that people would like to do.

There were high levels of demand for walking, with a smaller number wanting to go sightseeing more often.

More active pursuits were also amongst the top activities in terms of future preferences, in particular mountain biking and road cycling.

The survey also asked people which types of places they would like to visit in the future.

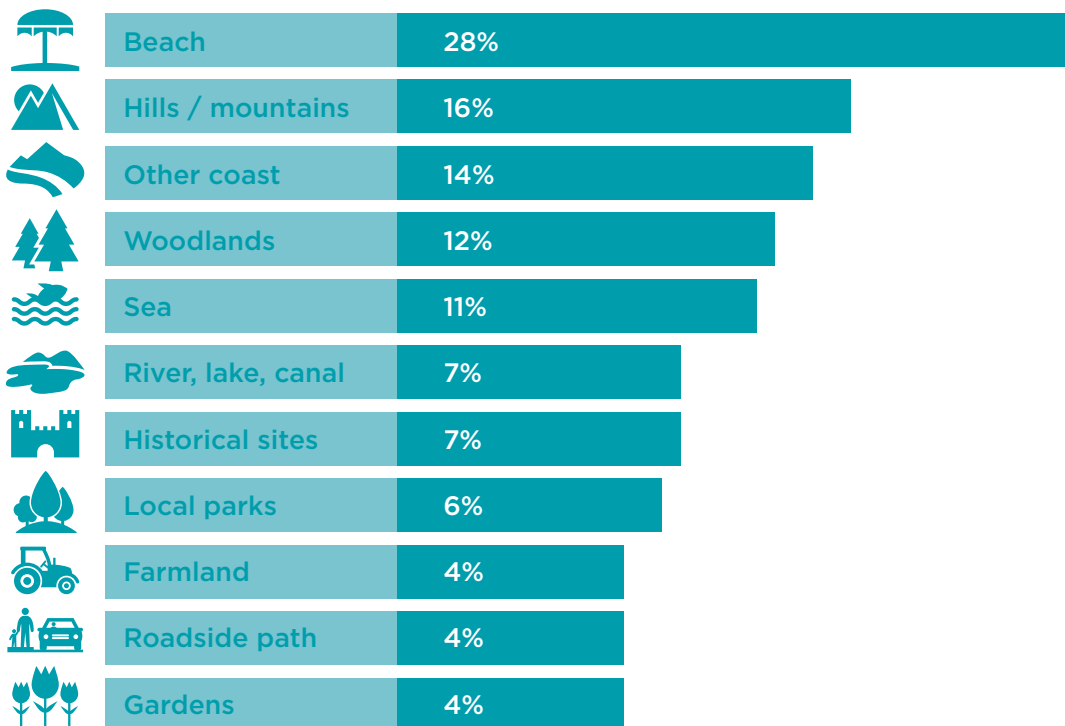
Here we saw a change to current recreation behaviour, as the highest demand was for visiting beaches, followed by hills and mountains. In contrast, far lower levels of interest were expressed for visiting local parks.

People's preferences appear to reflect the appeal of Wales' more iconic places, which offer the opportunity for a special day out. In contrast, some 'doorstep' places, although widely used, are less aspirational.

However, there is a question about whether people's preferences would be translated into actual behaviour, so we need

a balance between special places and doorstep opportunities.

■ Graphic 10. Where to people want to go in the future?



Note: numbers are a percentage of the total adult population in Wales eg: 28% of adults would like to visit the beach more often in the future

Focus on Future Demand

So if people would like to do more outdoor activities, why are they not doing so? Key to understanding this is to look at the barriers that people face that potentially restrict their ability to change their behaviour.

The survey asked people why they hadn't taken part in their preferred activities. It was clear that

opportunity barriers

were the main constraint. Most people said the main reason they hadn't participated more was due to being too busy or a lack of time, followed by bad weather. This was particularly the case for employed people, men, and those with children.

In contrast, the main barriers mentioned by people who currently don't participate were more likely to be due to disability and health reasons. These can be seen as

absolute barriers

However, as with current participation, the barriers that have often been assumed to be central in preventing participation, such as cost or lack of transport, are rarely mentioned by people.



Physical Activity and Health Benefits

With increasing levels of obesity in Wales, and a rise in associated health problems such as coronary heart disease, diabetes, and certain types of cancer, the need to increase physical activity levels has never been greater.

We all know that taking part in outdoor recreation can help people lead healthier lives. But do we know exactly who does, or doesn't gain health benefits from being physically active in the natural environment? And how much of a contribution does participation in informal outdoor activities make to the overall health of adults living in Wales?

To answer this question, detailed analysis of the survey was undertaken to understand the relationship between

participation in outdoor recreation ... physical activity ... health benefits.

This was based on new guidance from the World Health Organisation (WHO) which stated the minimum levels of physical activity required for health, based on:

- Intensity
- Frequency
- Duration

The survey found that the population of Wales is divided into 7 distinct groups, ranging from those who never use the outdoors for recreation to those who are frequent, active participants.

Each 'segment' has a unique combination of frequency, duration, and intensity, and while some gain the 'maximum' health benefits from their participation in outdoor recreation, others will have gained very little if any of the benefits associated with physical activity.

Based on their relative levels of participation, and associated health benefits, we grouped each segment into one of 3 'Zones', based on a 'traffic light' system:

- Those in the 'Red Zone' participate the least, and gain little if any physical activity health benefits;
- Those in the 'Amber Zone' take part in some degree of outdoor recreation, but in different ways fail to meet the minimum level of either frequency, intensity, or duration required for health benefits;
- Those in the 'Green Zone' meet or exceed the minimum levels of physical activity.

The combination of the two segments in the 'Green Zone' represents the contribution that outdoor recreation makes to the physical activity levels required for a healthy life.

Physical Activity and Health Benefits

The survey found that a total of 28% of the adult population of Wales are meeting the minimum level of physical activity through outdoor recreation alone!

But are people becoming more or less physically active? Comparing the results from the 2011 and 2014 surveys shows that there has been a

significant decrease in the most active ‘green’ group and significant increase in the least active ‘red’ group.

This is a distinct contrast from the change that occurred between 2008 and 2011, when active participation increased.

This change is likely to be due to the decrease in frequent participation, and the associated decline in short-duration, close to home doorstep visits to the outdoors. More work needs to be done to understand the causes of this decrease, and to ensure that active participation increases in the future.

Graphic 11. Physical Activity Groups: Profiles and Changes

● Green Zone	2008	2011	2014	2014 Change	More likely to be:
Frequent and high intensity	17%	19%	15%	↓	dog owners, rural, degree qualification, young (16-24)
Infrequent but high intensity and 150+ mins	12%	13%	13%	—	male, middle-aged, work full-time, have children
● Amber Zone					
High intensity but infrequent and under 150 mins	26%	25%	27%	↑	urban, young (16-24) work full-time
Frequent, low intensity	8%	8%	8%	—	dog owners, Communities First
Infrequent, low intensity	21%	21%	22%	—	have children, carer, Communities First, Urban
● Red Zone					
Rare participants	8%	6%	9%	↑	Communities First elderly, disabled
Non-participants	6%	6%	7%	—	Elderly, disabled Female, Urban, Communities First

Note: numbers are a percentage of all adults in each Physical Activity group: eg: in 2014, 15% of adults were in the ‘frequent and high intensity’ group

Expenditure and Economic Benefits

Tourism is an important part of the economy in Wales, and visits to the outdoors make a significant contribution.

Many people spend money when they take part in outdoor recreation, and this local expenditure helps to keep that money within Wales, bringing extra benefits to the national economy.

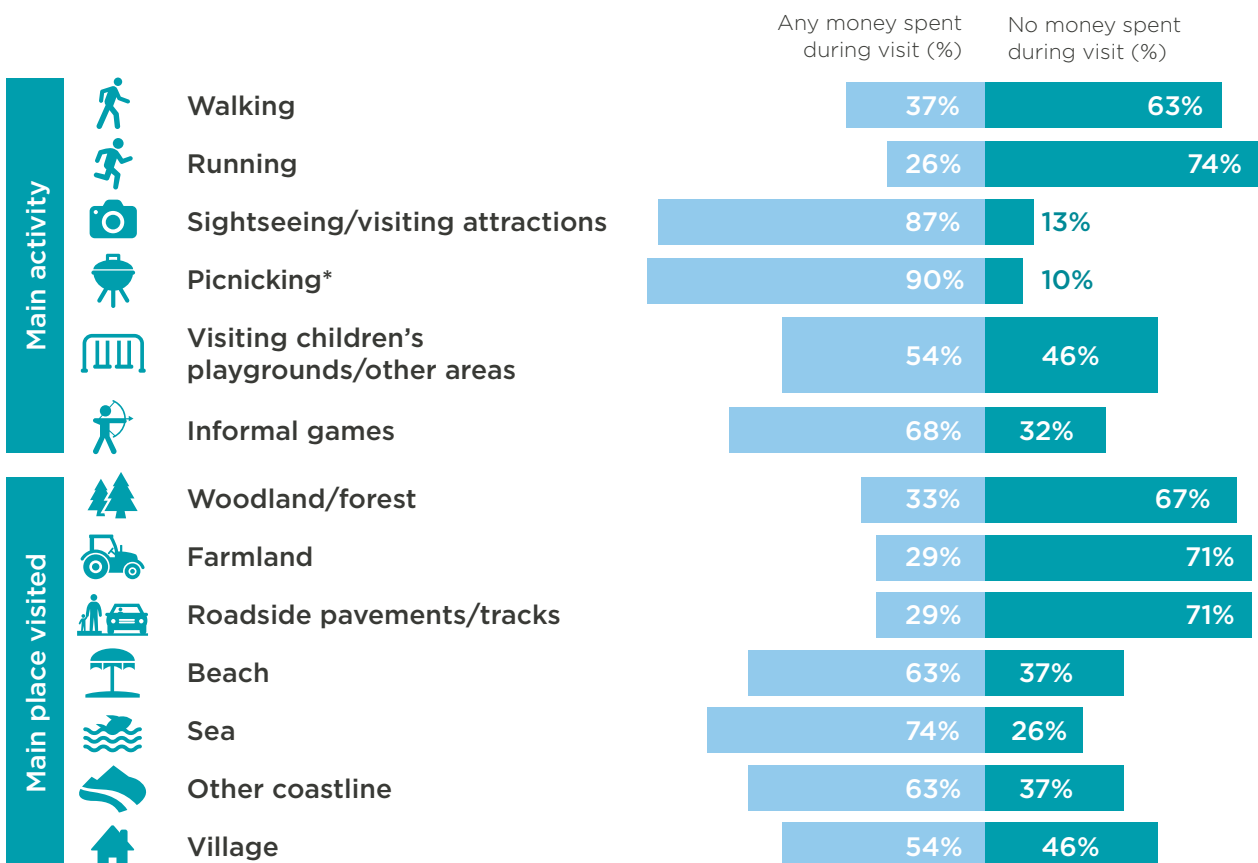
But who spends what, when, where, and how much? To answer these questions, the survey asked people about what money they spent on their most recent visit. This was then averaged out to be representative of all recreation visits to the outdoors.

In total, £5.6bn was spent during visits to the outdoors for recreation by people living in Wales.

This is based on a total of 437 million visits per year and an average spend of £12.74 per visit.

The survey found that people spent money on nearly half (42%) of all visits to the outdoors. People were more likely to spend money when they took part in social activities with family and friends, such as sightseeing or picnics, along with visits to Wales' magnificent coastline and beaches.

■ **Graphic 12. Any spend during most recent visit by main place visited and main activity**



*Caution, small sample - picnicking (89)

Note: numbers are a percentage of all visits to each type of place or activity eg: money was spent on 37% of all visits where people went walking

Caring for the Environment

The 'great outdoors' is a fantastic place for recreation in Wales and it is enjoyed by many people taking part in a multitude of different activities. However, the natural environment and biodiversity is under increasing pressure.

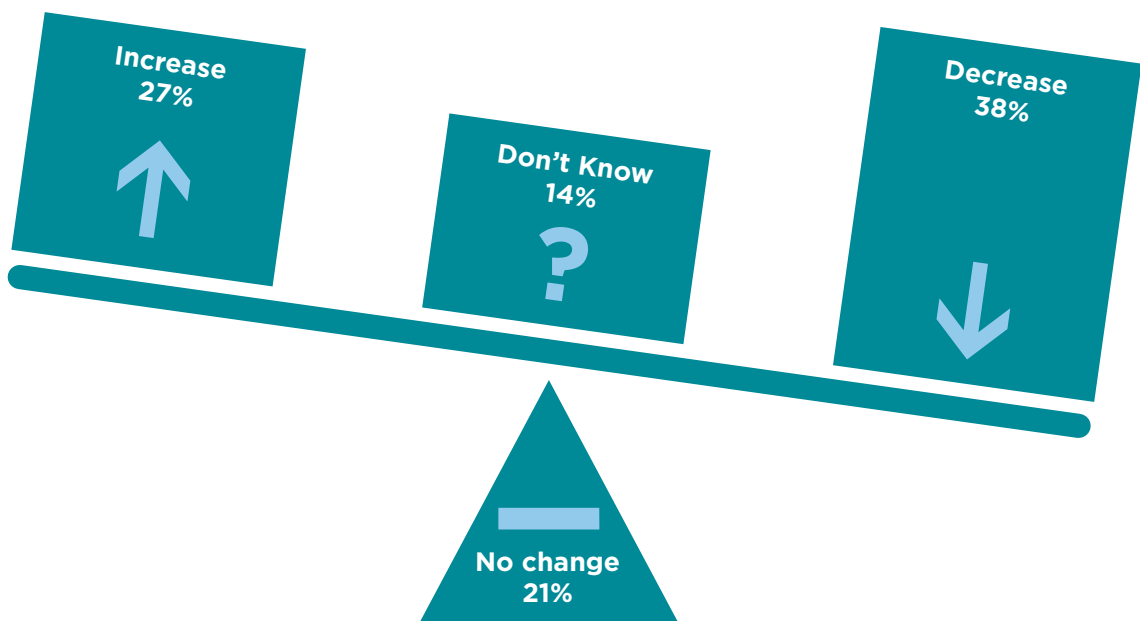
But what do people who visit the outdoors think about the environment? Do they think that the range of different wildlife species in Wales is changing, and are people concerned about biodiversity loss in the future? What actions, if any, do they take to help protect the environment?

The survey asked a series of questions to find out about people's attitudes and behaviours, and in particular to explore whether participation in outdoor recreation makes people more or less likely to care about the environment.

When we asked people about changes to biodiversity, we were surprised to find that over a quarter of people thought that it would *increase* (27%). However, more people thought that it would decrease in the future (38%), whilst 1 in 5 people didn't think it would change. When it comes to tackling biodiversity loss in Wales, it is important that we take account of these findings, and are aware that a lot of people do not think that the diversity of species will decline.

So are people concerned about any possible future changes to biodiversity in Wales? The survey found that nearly half of the population (43%) are concerned, with only a minority (21%) who are not.

■ Graphic 13. Do people think biodiversity in Wales will change in the future?



Note: numbers are a percentage of the total adult population in Wales eg: 38% of adults thought that biodiversity was decreasing

Caring for the Environment

We also asked people whether they had done a number of different activities to help protect the environment. These ranged from 'easier' everyday actions such as recycling, reducing home energy use, buying eco products, and walking or cycling rather than using the car; to 'harder' actions that required greater effort, time or finances such as volunteering or joining an environmental group. The majority of the population undertook at least one of the 'easier' actions, but a much smaller number had done any of the 'harder' actions to help protect the environment.

So what made a difference in people's environment attitudes and behaviours?

We found that *age* and *education* made the biggest difference - older people and those with a higher level of education were more likely to think that biodiversity would decrease in the future and had a higher level of concern about this.

But did participation in outdoor recreation make a difference?

People who visited the outdoors were more likely to think that biodiversity will decline in the future, and those who don't visit the outdoors are less likely to be concerned about biodiversity loss.

When it came to what actions people take to protect the environment, we found that people who visited the outdoors were more likely to do the 'harder' behaviours.

Overall, we found that although age and education made the biggest difference, people who take part in outdoor recreation are more likely to think that biodiversity loss is an issue and to do a wider range of actions to protect the environment.

■ Graphic 14. Actions done to protect the environment & nature by frequency of visits in the last 4 weeks

	Visits to the outdoors in last 4 weeks			
	Total	None	Infrequent (1-20)	Frequent (21+)
Recycled	96	90	97	97
Reduced home energy use	94	87	95	95
Bought local food	89	81	89	93
Bought eco friendly products	74	59	77	79
Walked/cycled rather than used car	70	30	77	80
Gardened for wildlife (incl. bird feeding)	68	60	68	73
Signed a conservation petition or participated in a conservation campaign	18	7	19	22
Been a member of an environmental/wildlife/conservation group	16	8	16	21
Actively volunteered with a project/organisation to protect environment/wildlife	12	4	12	15

Figures highlighted in green are significantly higher than the total e.g. 80% of those who took 21 or more visits to the outdoors in the last 4 weeks walked/ cycled rather than using the car compared to 70% of the population

Key Challenges

Outdoor recreation is clearly enjoyed by the majority of people in Wales, and it delivers significant benefits to health, the economy, and the environment. But what are the key challenges for the future?

The results from the survey provide a robust evidence base on people's participation, the activities they enjoy, and the types of places they visit. Understanding this complex behaviour highlights some of the key challenges that need to be considered to ensure that outdoor recreation continues to provide valued benefits for people in Wales.

Challenge 1: Increasing frequent participation.

The survey has found that frequent participation has declined. Although we know that this is associated with the corresponding decrease in 'doorstep' visits, we need to do further work to understand why this is happening. This will help inform action to increase frequent participation in the future.

Challenge 2: Supporting older people

Age has been shown to be one of the key determinants of participation in outdoor recreation, which when combined with an increasingly aging population, highlights the need for more focus on older people. Understanding their activities, preferences, and barriers will help inform more targeted interventions to support and encourage participation.

Challenge 3: Supporting women with children

'Life-stages' are a key factor in participation, and the survey has found that women with children are an important group. With distinct motivations, levels of physical activity, and challenges, there is a need to consider their outdoor recreation needs to improve opportunities and increase active participation.

Challenge 4: Flexible provision for different activities

The survey has found that over the years participation in different activities has both increased and decreased. Change in activity preferences is often relatively unpredictable, and can shift rapidly. This highlights the need for recreation provision to be flexible, and where possible to accommodate a diversity of activities on the doorstep.

Challenge 5: Balancing health and economic benefits

Outdoor recreation provides benefits for both health and the economy. Health benefits are particularly associated with frequent participation in doorstep activities, whilst economic benefits are derived more from days out to the best of Wales' iconic coast and mountains. A key challenge is to find the right balance of support for both of these different types of recreation.

Challenge 6: Using outdoor recreation to increase pro-environmental attitudes and behaviours

For the first time, the survey has shown that participation in outdoor recreation is linked to attitudes and behaviours that are related to caring for the environment. More work is needed to understand this connection, and to improve future communications to increase awareness and encourage behaviour that supports the environment.



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