# Welsh Outdoor Recreation Survey 2014: First Release

This publication presents the headline results from the 2014 Welsh Outdoor Recreation Survey, commissioned by Natural Resources Wales. It also compares the data from the 2014 survey with the previous 2011 and 2008 surveys.

The survey is representative of adults living in Wales, and provides results on:

* Overall participation in outdoor recreation
* Places visited
* Activities
* Motivations and Barriers
* Health and Economic Benefits
* Future demand

The survey also covers topics relating to people’s wider engagement with the environment, providing results on:

* Perceptions of changes to biodiversity
* Levels of concern
* Pro-environmental behaviours

## Overall Participation

* Overall participation in outdoor recreation remains high with 93% of the adult population in Wales visiting the outdoors at least once in the last 12 months. There has been no significant changein the overall proportion of the population visiting the outdoors compared to previous surveys.
* However, 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.

## Places and Activities

* Walking remains the most regularly undertaken activity, with 83% of people stating that they had gone for a walk in the last 4 weeks. There has been no significant change compared to previous years.
* Other activities undertaken most often in the last 4 weeks include sightseeing (43%), taking children to playgrounds (35%), and wildlife watching (27%). These have all shown a slight decline from 2011, but a slight increase compared to 2008.
* In 2014, running (22%), picnicking (22%), and road cycling (14%) have maintained the levels of participation that were shown in 2011, with all showing an increase from 2008.
* Local parks were the most visited main destination (16% of all visits), followed by woodlands / forests (15%). This is a change from 2011, with visits to local parks increasing and trips to woodland decreasing. However, these have continuously been the top two destinations in all previous surveys.

## Motivations, Barriers, and Future Demand

* Health and exercise (23%) and/or exercising a dog (22%) were the most frequently mentioned motivations in 2014, as they were in 2011 and 2008.
* The main barriers to participation in the last 12 months were physical disability (29%) and health reasons (21%). In contrast, the barriers to more frequent participation (in the last 4 weeks) were ‘too busy / lack of time’ (29%) and ‘bad weather’ (25%). These are the same main barriers as were cited in 2011 and 2008.
* Demand for future recreation is high with 60% of adults stating that they would like to visit the outdoors more often. This is the same as the level of potential future demand expressed in 2011 and 2008.

## Health and Economic Benefits

* The health benefits of participation in outdoor recreation are associated with either a moderate or high level of physical activity. Over two-thirds (68%) of respondents reported that they undertook their most recent activity at a moderate or high level of intensity (described as either raising their breathing rate or being out of breath). This is consistent with 2011 and 2008.
* New questions about expenditure associated with visits were asked for the first time in 2014. In total, 42% of all visits incurred expenditure.
* Based on the amounts people stated that they spent on a range of items, from food to fuel, the average spend across all visits was £12.74 per visit. As expenditure was incurred on only 42% of visits, this equates to an average of £30.51 per visit where any money was spent.
* 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.

## Environmental Attitudes and Behaviours

* New questions were asked in 2014 about people’s perceptions of changes to biodiversity, their level of concern, and their pro-environmental behaviours. Biodiversity was defined as ‘the variety of all life on earth, this includes all species of animals and plants’.
* Opinion is mixed about past changes to biodiversity in Wales, with about a third of people thinking there has been *no change* (34%), and slightly less thinking there has been a *decrease* in biodiversity (31%). In contrast, 19% of respondents thought there had been an *increase* in biodiversity, with 15% answering that they did not know.
* In response to whether people thought there would be a change to biodiversity in Wales in the future, over a third of respondents think there will be a *decrease* (38%). However, a substantial proportion (27%) think there will be an *increase* in biodiversity, whilst 21% think there will be *no change*.
* Nearly half of all respondents (43%) expressed a moderate or high level of concern about changes to biodiversity, with only 21% indicating that they had little or no concern.
* People were asked if they had undertaken a number of possible activities which could help protect the environment, ranging from recycling, to wildlife gardening, to active volunteering. The majority of people had done several of the day-to-day activities, but only a small number had undertaken some of the activities that required more substantial input such as environmental volunteering (12%).

## Methodology

The survey covered participation in leisure time activities that were undertaken in a wide range of places including mountains, farmland, local parks, rivers, beaches and the sea (it did not include ‘private’ places such as gardens). Over 19 different activities were included in the survey, from hill walking to picnics, which captured the full range of both urban and rural pursuits.

A total of 5,995 telephone interviews were carried out by TNS between January 2014 and January 2015 with adults (aged 16 years or over) living in Wales. The approach followed was comparable to that used in the 2008 and 2011 surveys. Interviews lasted an average of 15 minutes and were conducted throughout the year on all days of the week and at different times.

To achieve a random sample, households were selected by Random Digital Dialling (RDD) and a Computer Assisted Telephone Interviewing (CATI) system was used to randomly select individual respondents if more than one adult lived in the household.

Results from some questions (1 to 3a, and 16b to 24) have been weighted using demographic and geographic variables to provide results that are representative of the Welsh population.

Results from questions relating to the ‘most recent visit’ (4 – 16a) have been weighted so that the results are representative of all visits taken to the outdoors.

## Data Tables and Publications

Data tables presenting the full findings from the survey are available to download from the Natural Resources Wales website.

A Full Report and Technical Report on the 2014 Welsh Outdoor Recreation Survey will be published on July 16th 2015.

## Official Statistics

This is an Official Statistics publication. For more information about Official Statistics and the UK Statistics Authority visit www.statisticsauthority.gov.uk.