



Countryside Recreation Network

**Who Visits and Why?
Results from National Surveys of Visitors to
the Outdoors**

2010 Seminar Proceedings of the
Countryside Recreation Network

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CRN Secretariat

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"Who Visits and Why: Results from National Surveys of Visitors to the Outdoors"

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"Who Visits and Why: Results from National Surveys of Visitors to the Outdoors"

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Feedback from workshop session:

Delegates split into groups to discuss how useful the survey results are, what other information could be collected and how they might use the results in their own organisations.

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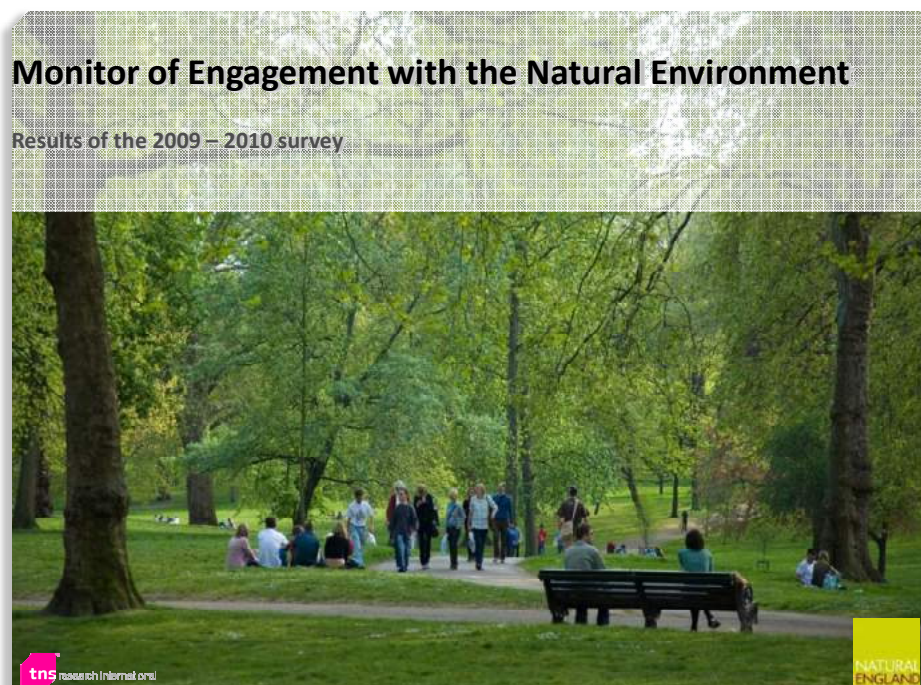
Keynote results from MENE survey
Hazel Thomas, Natural England
Tom Costley, TNS Research International

The presentation summarises the headline findings from the first year of the Monitor of Engagement with the Natural Environment (MENE) survey. The survey collects detailed information on people's use and enjoyment of the natural environment, focusing on visits to the natural environment. Fieldwork took place between March 2009 and February 2010.

For the purposes of this survey the natural environment is defined as the green open spaces in and around towns and cities as well as the wider countryside and coastline.

The survey was undertaken by TNS Research International on behalf of Natural England, the Department for Environment, Food and Rural Affairs (Defra) and the Forestry Commission.

Understanding what people want from the natural environment, using customer segmentation

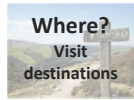
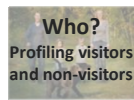


Agenda

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- Background to the survey
- Survey methods
- Results from the first year of interviewing



- Year Two
- Accessing and using the results

Background to the survey



Background to the survey



- Between 1996 and 2005 a series of surveys were carried out to track participation in leisure day visits.
- These surveys included 'days out' in the countryside but they did not provide detailed information on people's **day to day use and enjoyment of the natural environment**.
- In 2009 Natural England, Defra and the Forestry Commission commissioned TNS Research International to undertake the Monitor of Engagement with the Natural Environment (MENE).



The survey aims



- MENE provides the most comprehensive dataset yet available on people's use and enjoyment of the natural environment.
- It includes comprehensive information on **visits to the natural environment** as well as other ways of enjoying the natural environment such as **gardening, watching wildlife** and **volunteering**.

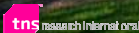


What makes MENE different?



- MENE captures information on all visits to the natural environment, including visits to local informal green space which were under recorded by previous surveys.
- It provides more accurate estimates of the volume of visits to the natural environment, because the survey ran throughout the year rather than being a one-off snap shot in time.
- Data is collected at a range of different spatial scales (including small areas) and amongst different socioeconomic groups.
- The survey collected origin and destination data . 79 per cent of visits were allocated a grid reference and we were able to record visitors addresses in 85 per cent of cases.
- It is also important to understand why people don't visit, so the survey collected this data too.
- The survey collects information on attitudes towards the natural environment.

Survey methods



Survey method

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In-home face to face interviews

- Weekly interviews on TNS –RI omnibus survey
- Representative of the English adult population



Year One - March 2009 to February 2010

- 48,514 interviews
- Main details of 58,653 visits and full details of 20,374 visits

Topics included in the survey

- Volume of visits to the natural environment
- Places visited
- Activities undertaken on visits
- Duration of visits
- Distance travelled on visits
- Transport used on visits
- Reasons for taking visits
- Expenditure during visits
- Other forms of engagement
- Barriers to participation

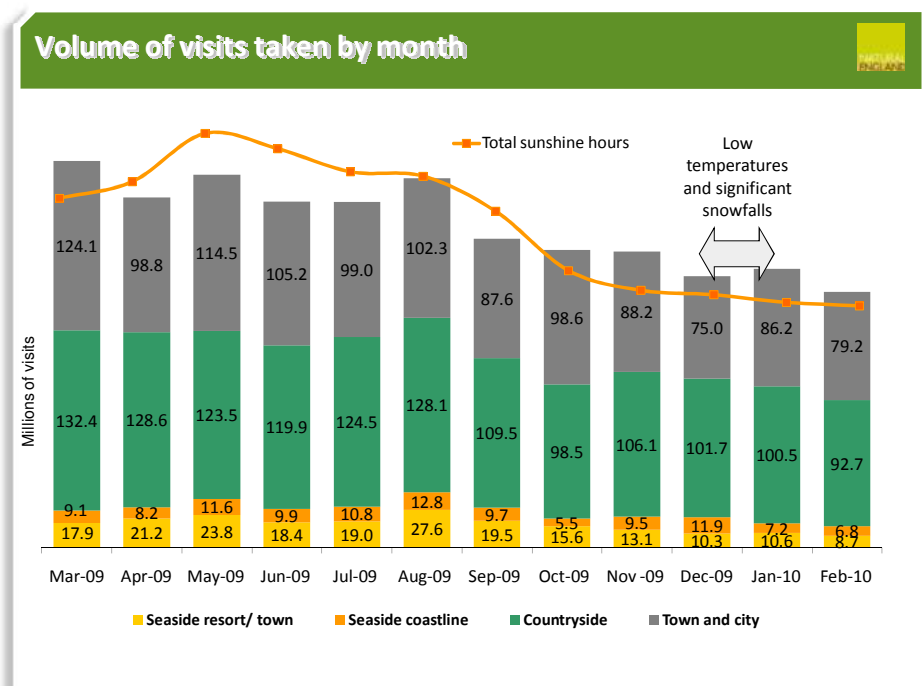
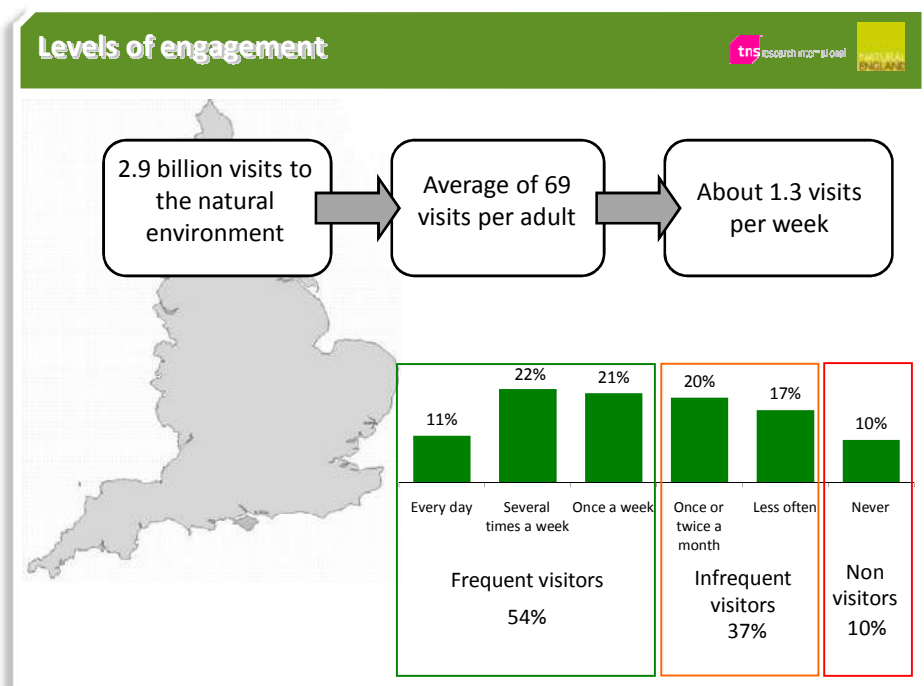
Year One Key results



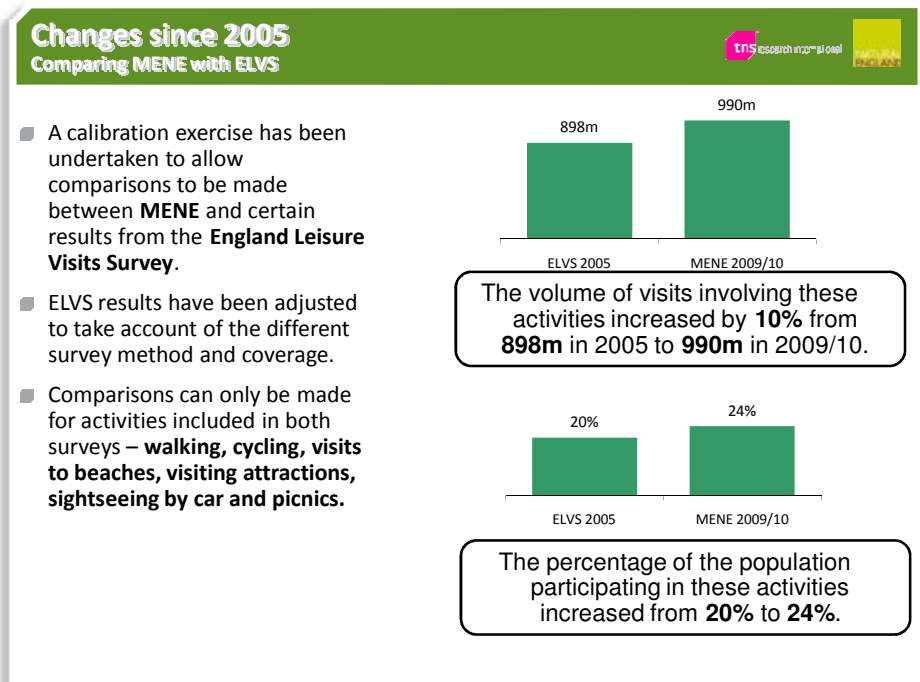
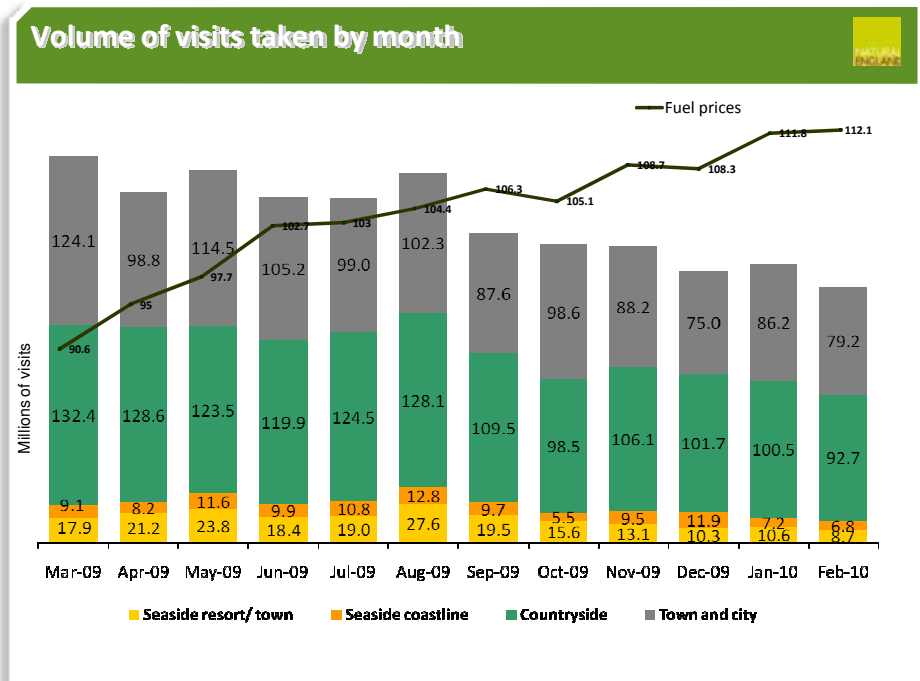
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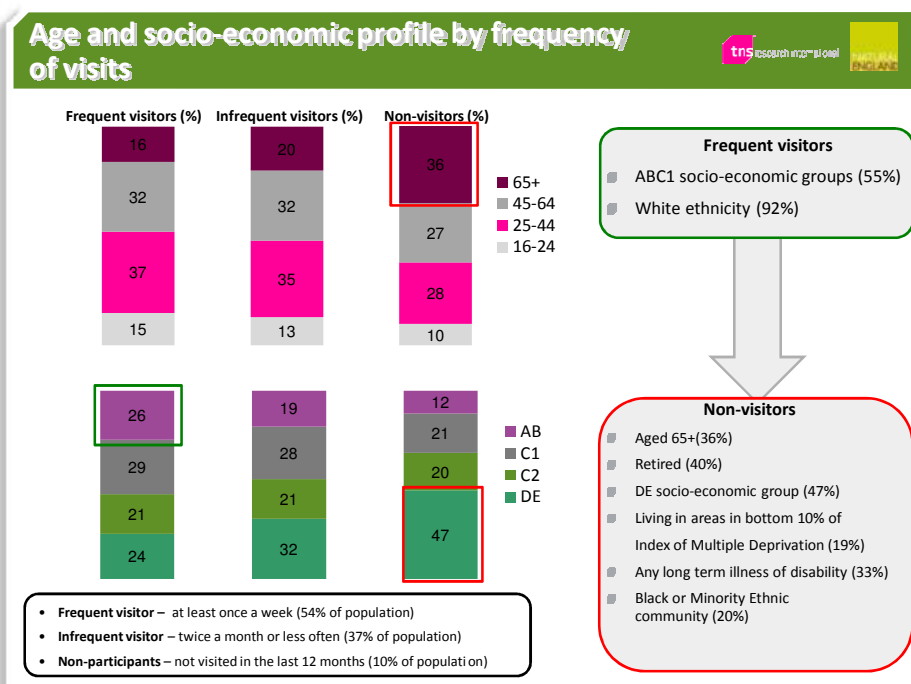
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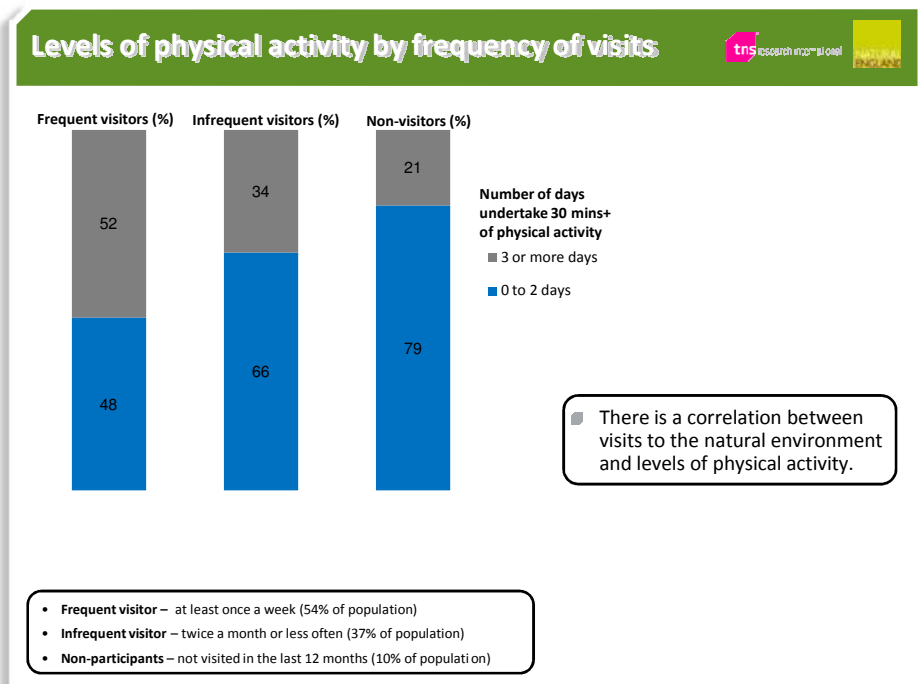


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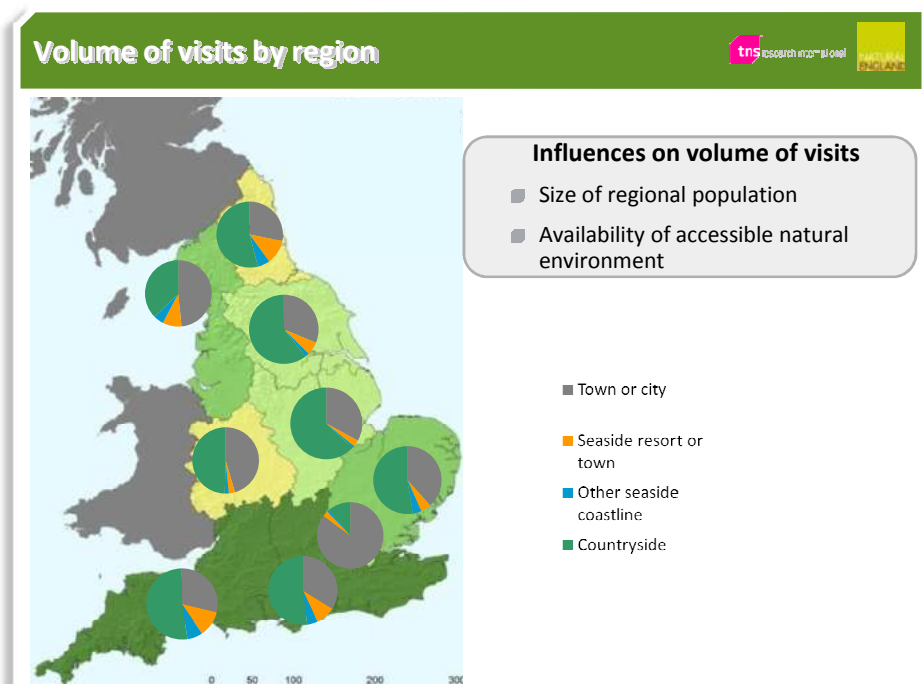
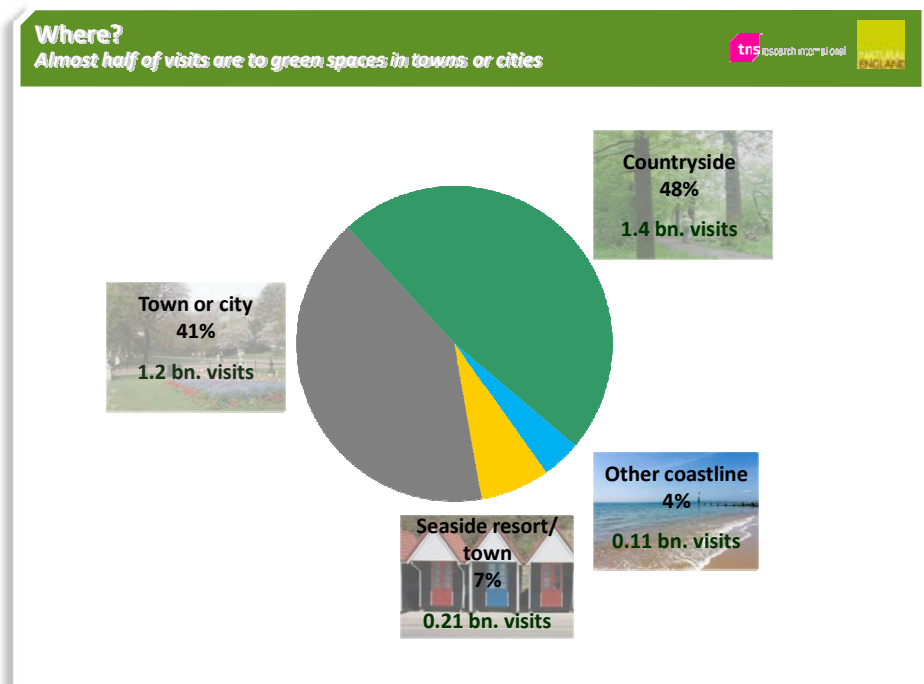


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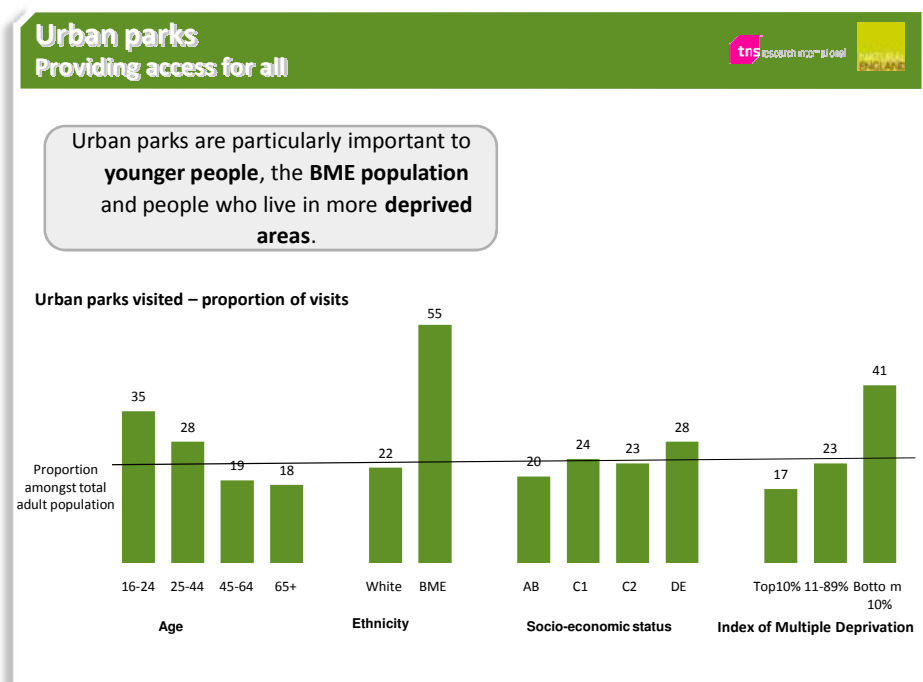
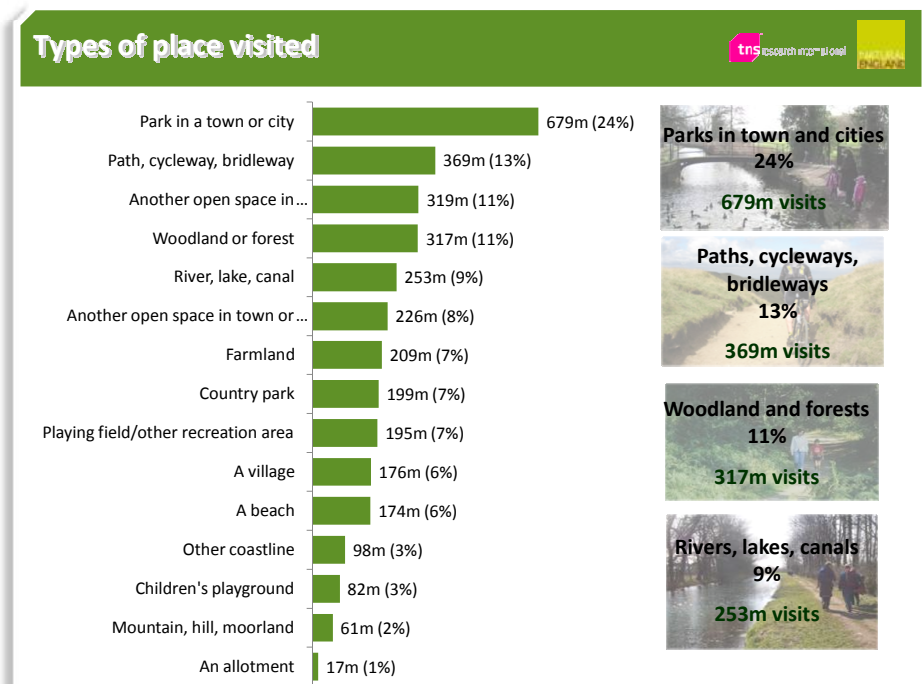


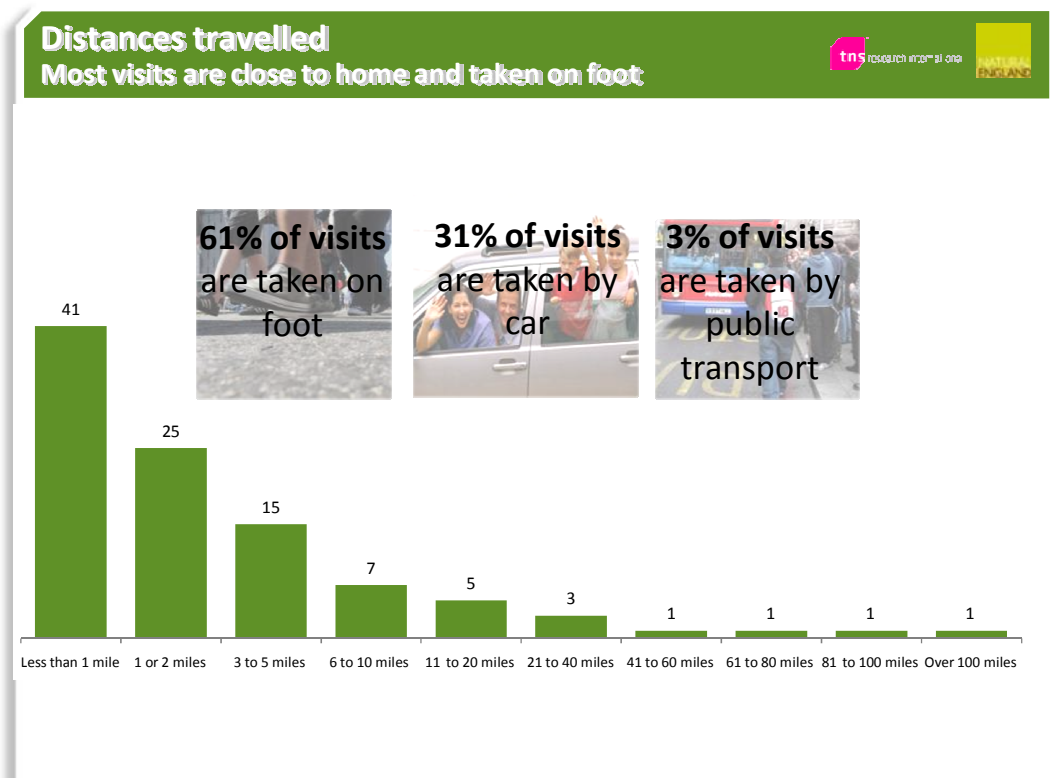


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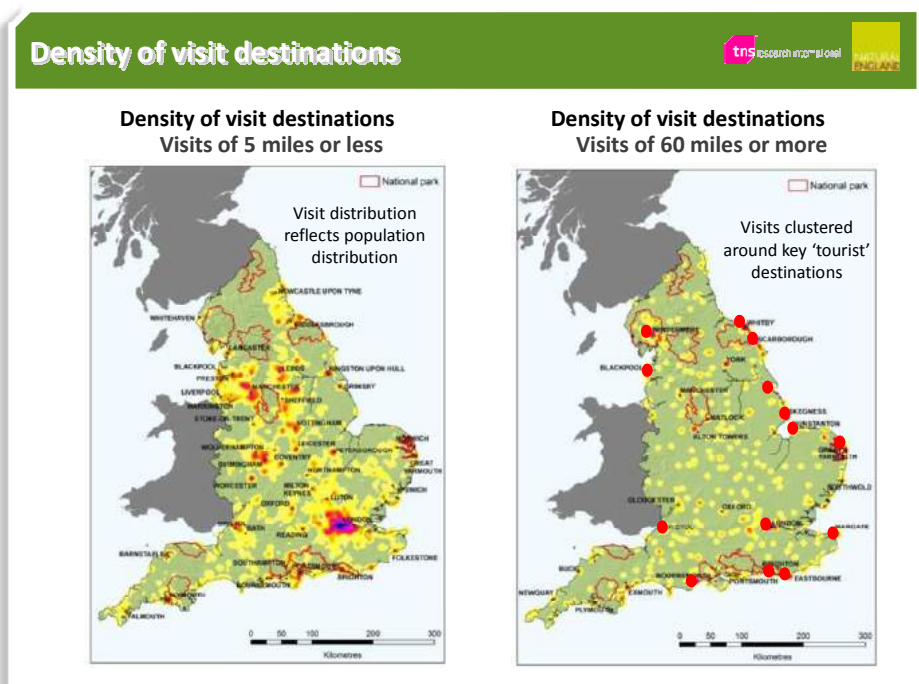
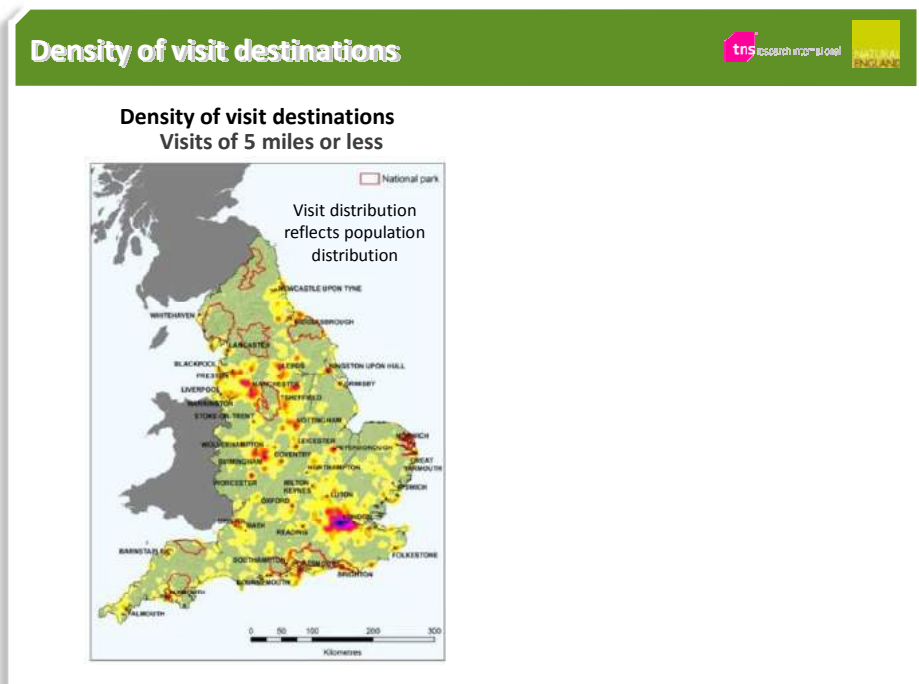


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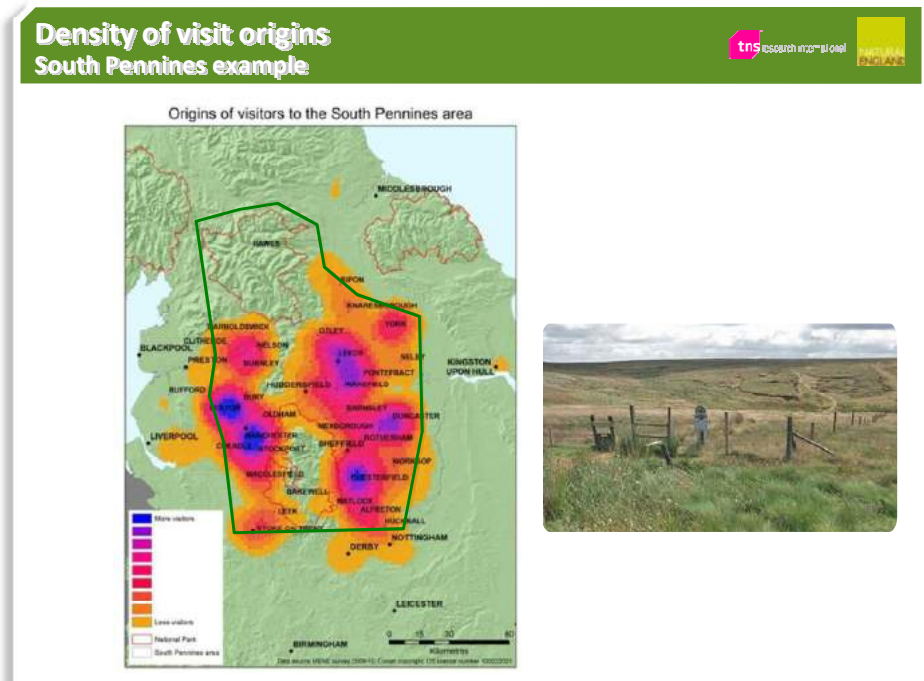




- In 41% of visits, the main destination was within one mile of the respondents home, with the majority of visits (81%) taking place within 5 miles of the start point.
 - Visits to coastal destinations were more likely to involve longer journeys whereas visits to green spaces within urban areas were more likely to involve a distance of less than one mile.
 - Visits amongst DE social classes were more likely to take within a mile of the home.



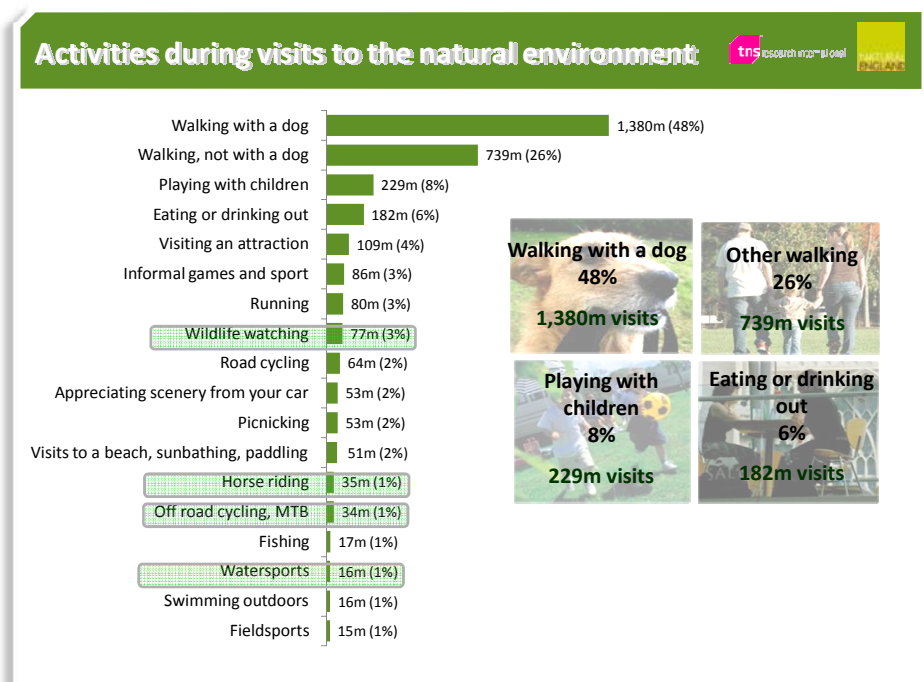
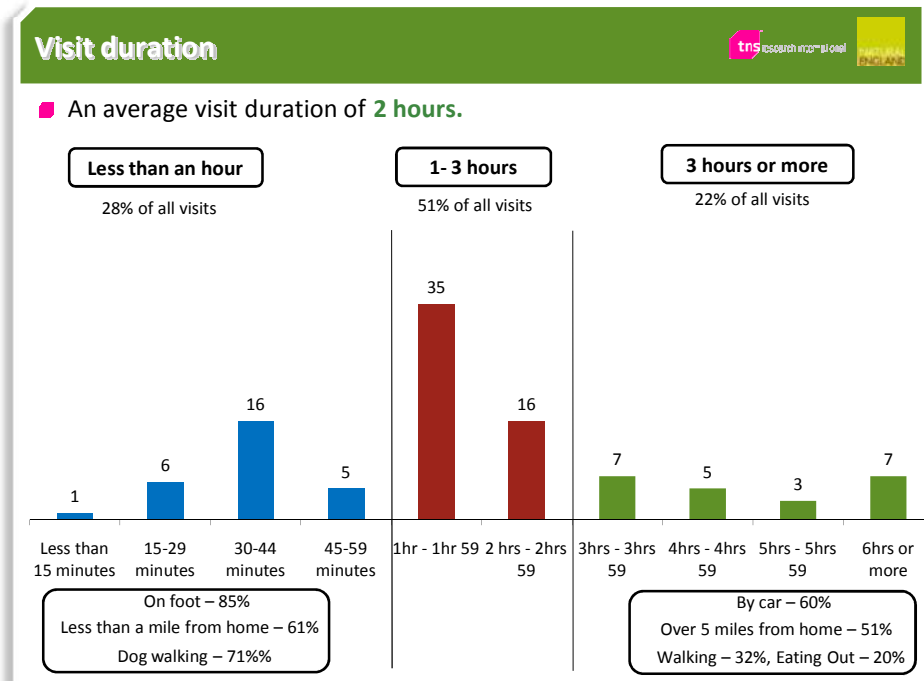
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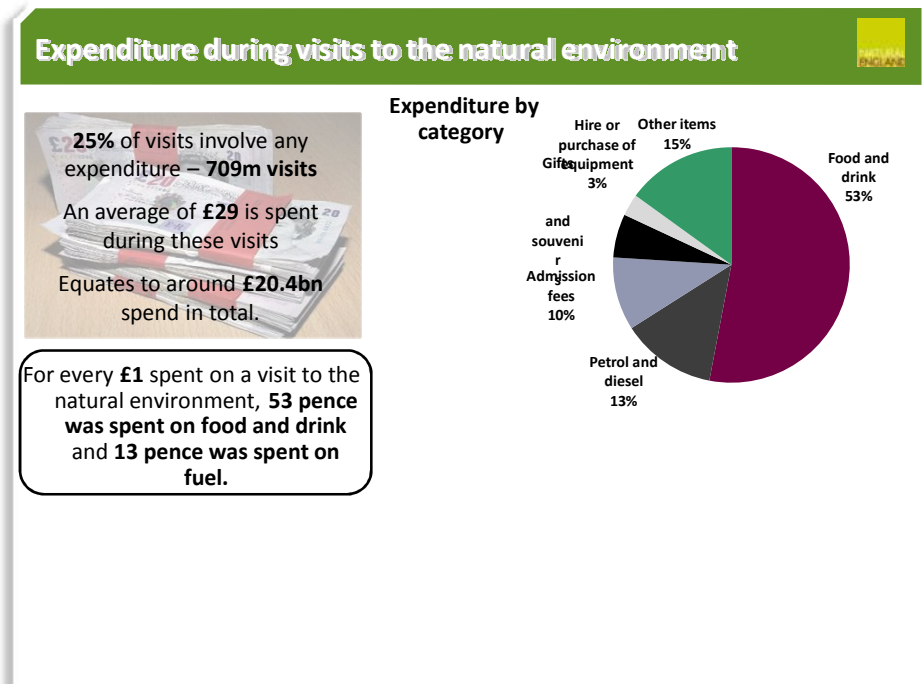
What?
A profile of visits



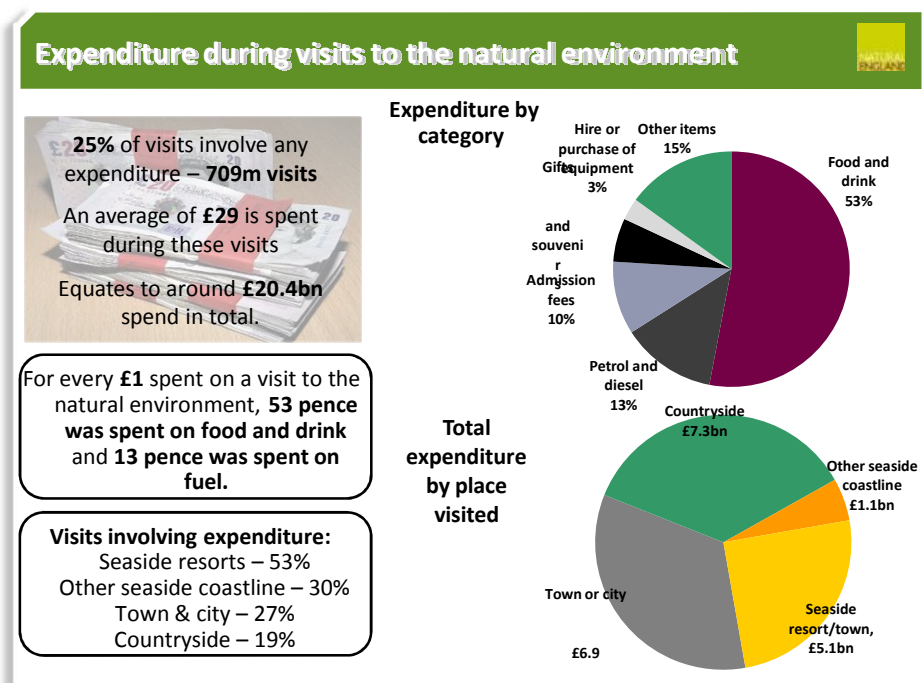
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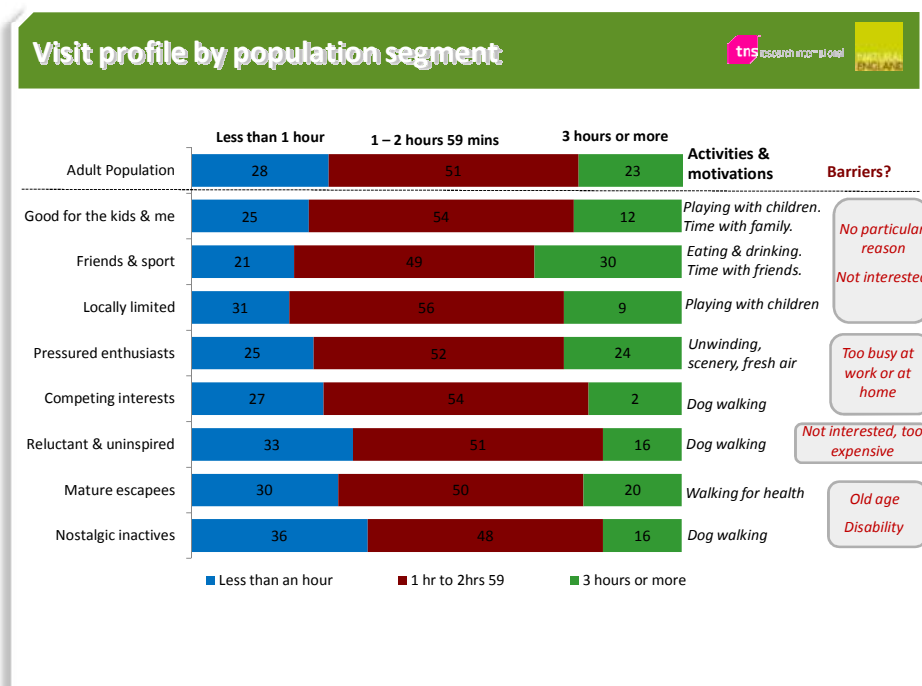


Spend by destination
 Town and city – spend on 27% of visits - av. £22
 Countryside – 19% - av. £28
 Seaside resort/town – 53% av. £47
 Other seaside coastline - 30% av.£34

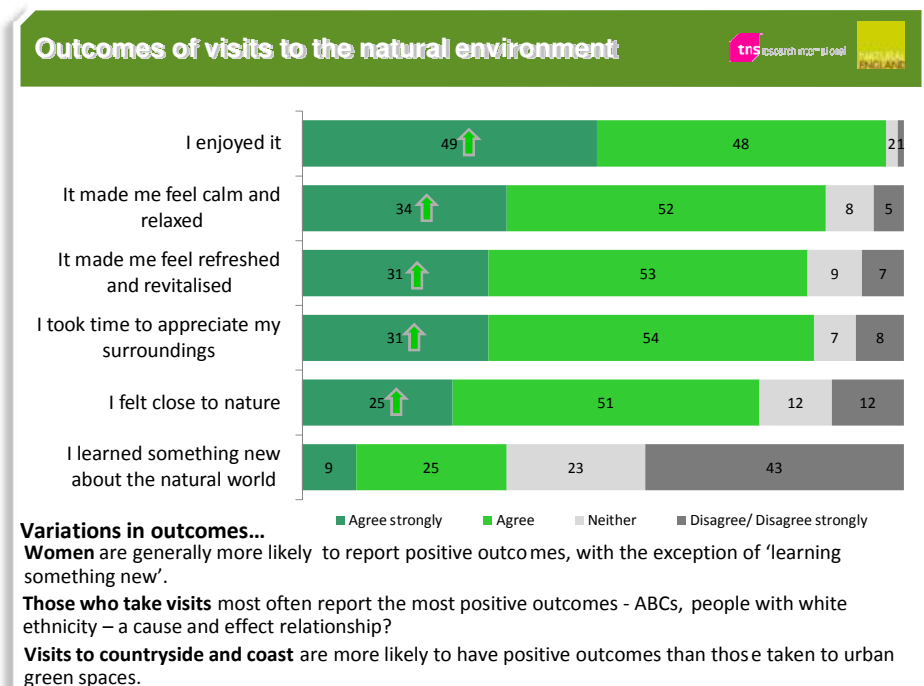
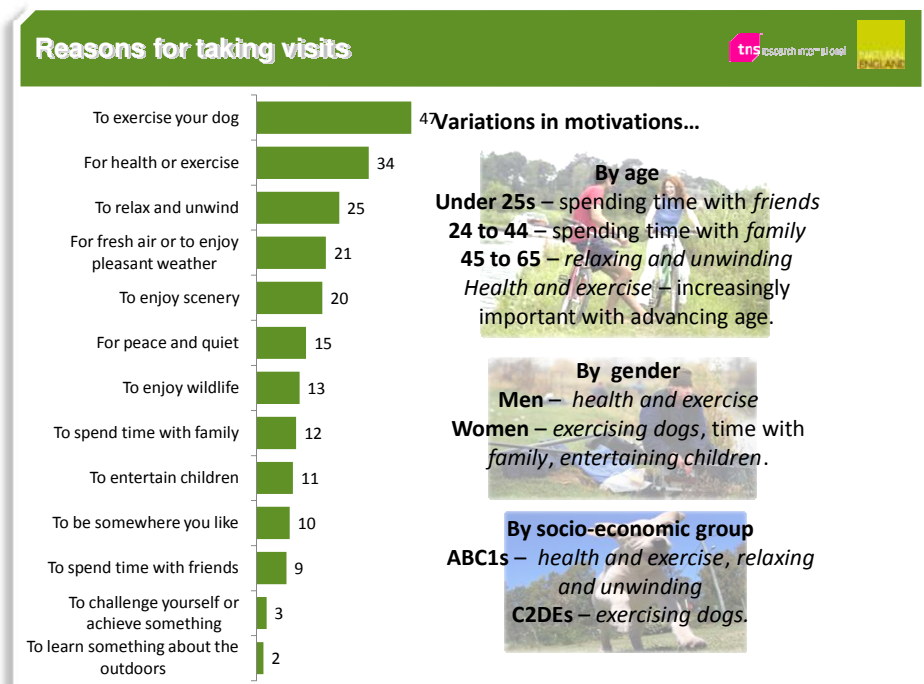


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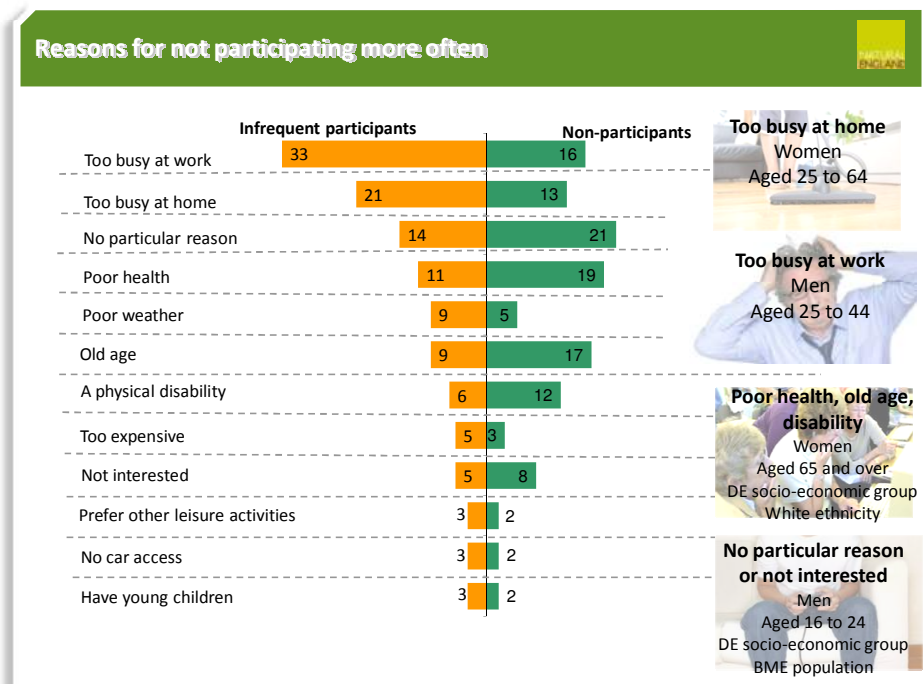
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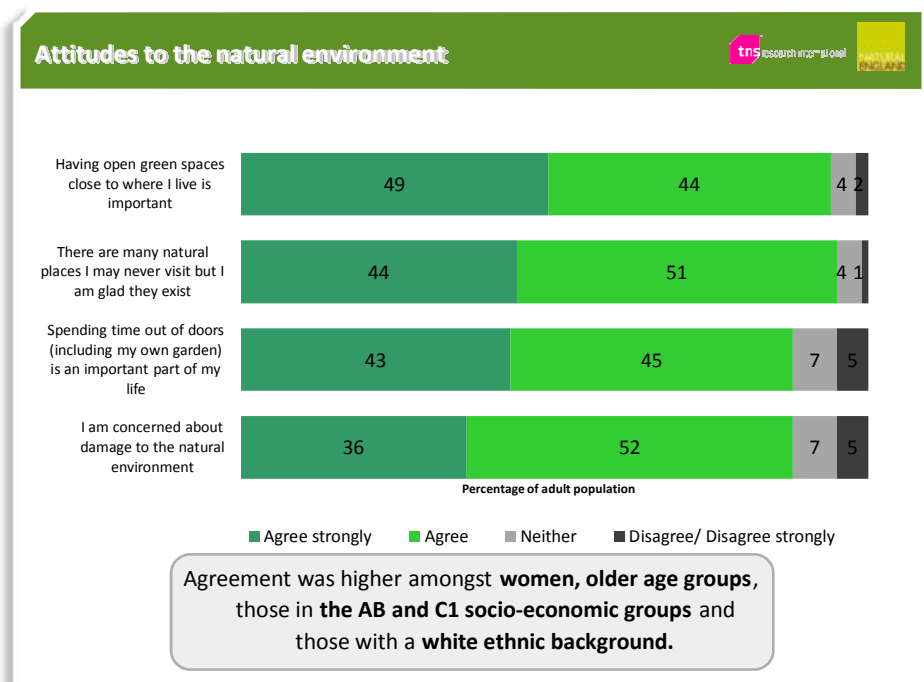
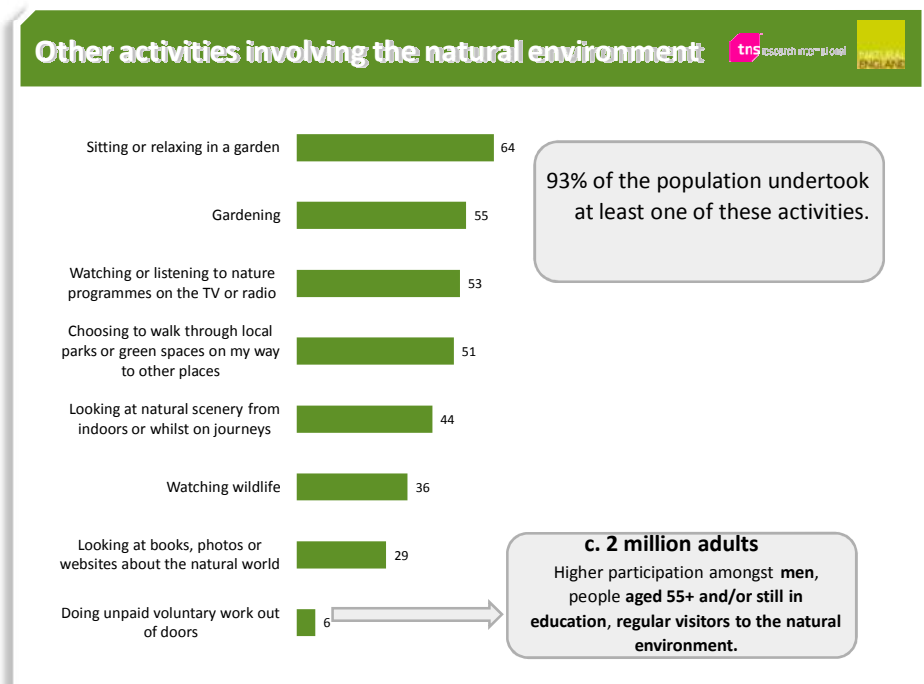
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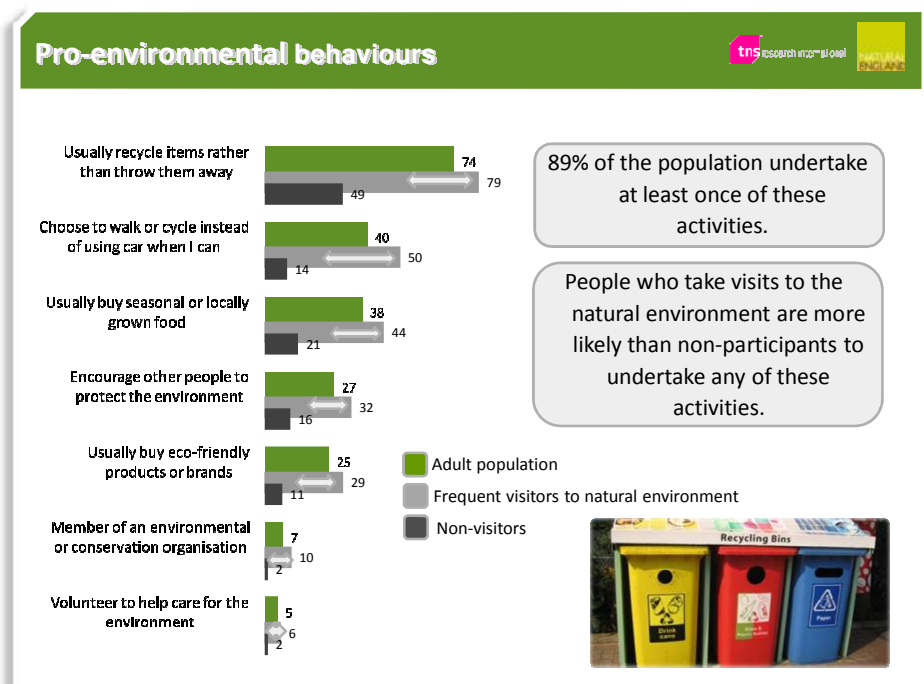
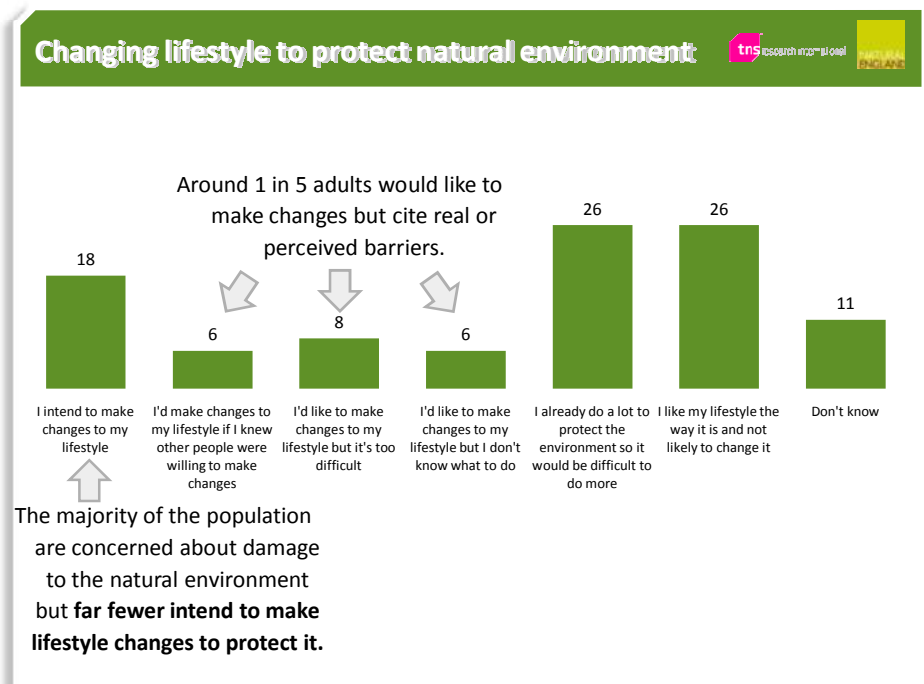
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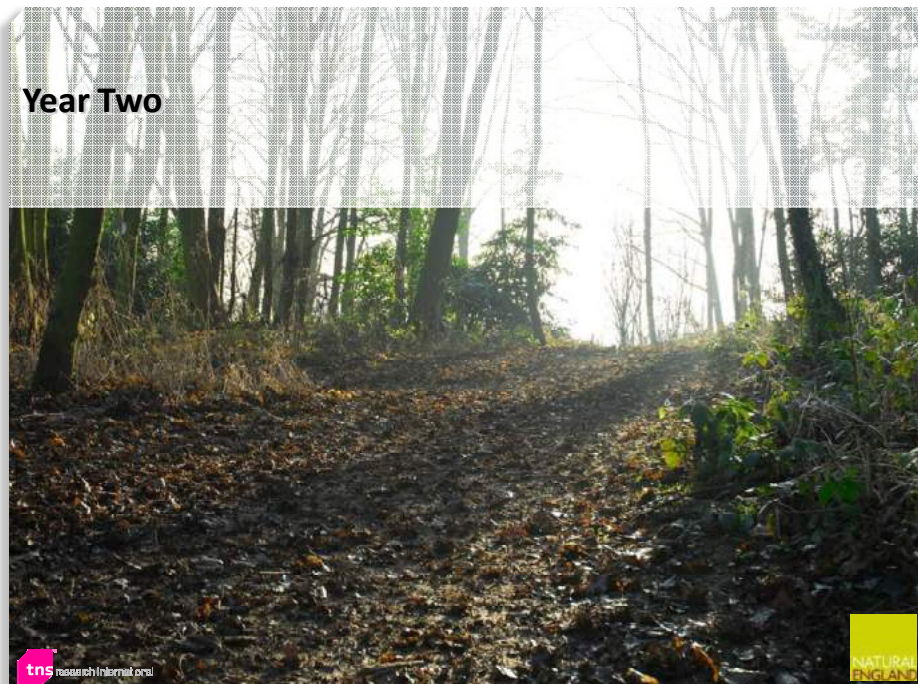


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MENE Year Two



- Fieldwork for the second year of MENE continues until the end of February 2011.
- The second year of the survey will allow for the measurement of changes in levels of engagement with the natural environment over the two year period.
- The cumulative sample of **c.90,000 interviews** will allow a robust analysis at an overall population level and amongst key groups of interest, including:
 - At a regional and county level
 - By population group e.g. age, ethnicity, socio-economic status
 - By type of place visited
 - By activities undertaken

Accessing and using the data



Accessing and using the data



2009/10 Annual Report, Technical Report and summary data tables



www.naturalengland.org.uk

Also available or coming soon...

Additional analysis reports

Detailed data tables

Electronic data viewer

Opportunities for bespoke analyses

Further questions

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- For further information relating to official statistics contact Stephen.herbert@naturalengland.org.uk
- For all other questions contact Ben Nichols, MENE Project Manager Ben.nichols@naturalengland.org.uk or Hazel.thomas@naturalengland.org.uk

Monitor of Engagement with the Natural Environment

Results of the 2009 – 2010 survey



tns research international



**Understanding what people want from the natural environment,
using customer segmentation**

**Alan Love
BDRC Continental Ltd**

What do we mean by the countryside anyway?

How do people, occasions and the countryside product interrelate?

What are the motivations for visiting the countryside?

How can we communicate countryside recreation to prospective visitors?

Why visit the
countryside?

CRN Seminar 20.10.10


bdrc
continental

providing intelligence

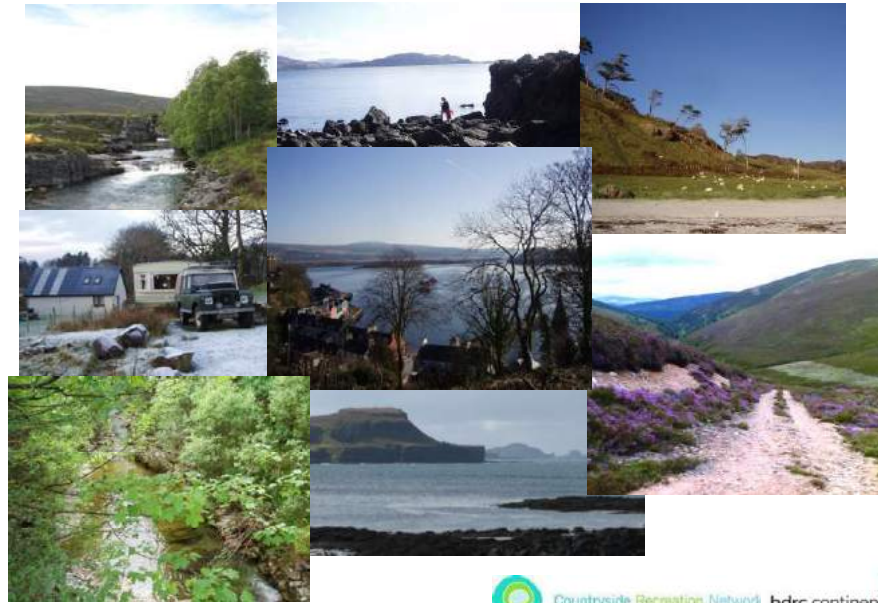
The countryside doesn't exist



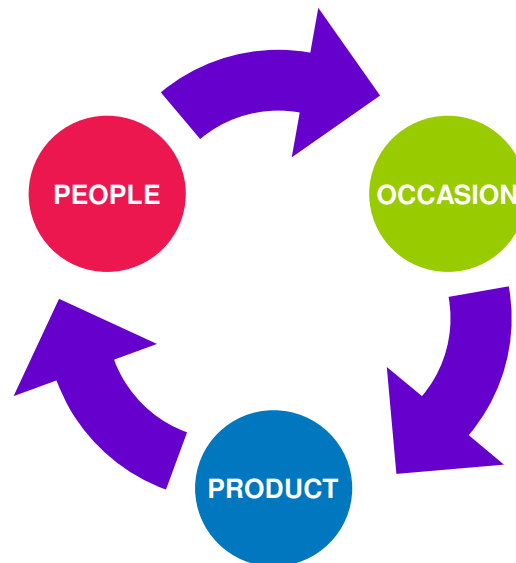
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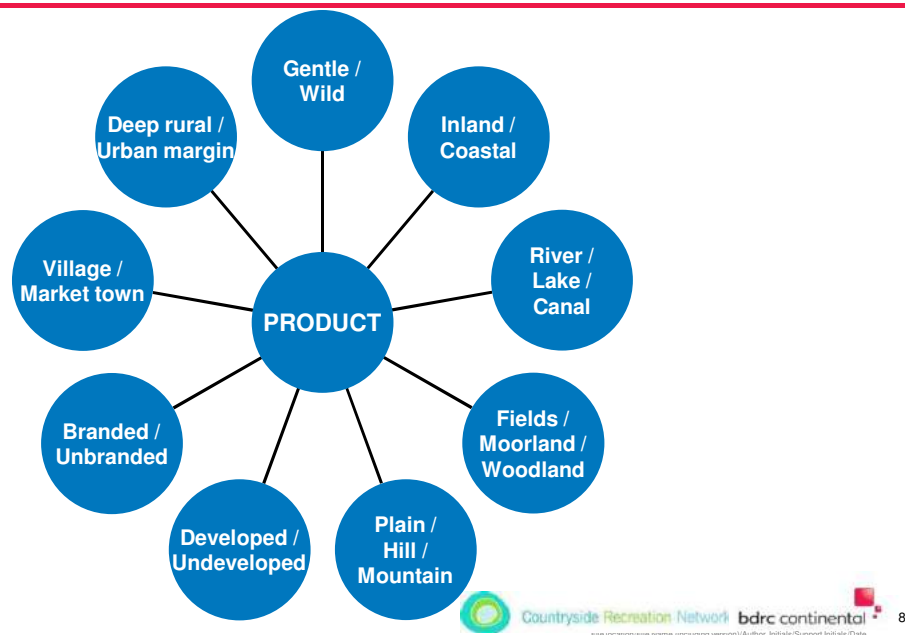
Many countrysides exist



Countryside recreation decision factors



Which countryside?



Motivations – personal needs

Get away from:

- Very motivating
- Not destination-specific or activity-specific
- Can be communicated visually
- Getting away from home, from work and from everyday routine

Get away to:

- Somewhere familiar
- Something familiar
- Somewhere different
- Something different
- Somewhere quiet
- Somewhere lively

Motivation – personal needs

Relaxation / refreshment

- Inactive / floppy
- Physically active
- Intellectually stimulating
- Emotionally engaging

Pushing the boundaries?
Or
Within the comfort zone?

Quality time

- Me time
- Time with my partner
- Time with my family
- Lads away / girls away

Sport / pastime / hobby

- Beginner
- Intermediate
- Expert

Motivations – product features

Distance / time / transport accessibility from home

Core, ancillary and complementary facilities

- Range
- Quality
- Staff and quality of service

Core activity cost / Whole trip cost

Character / style / atmosphere / local features

Luxury / indulgence / hedonism / spartan

Escapism

Theming / beauty / aesthetics

Participation / spectating

Suitability for adults / suitability for children

"Who Visits and Why: Results from National Surveys of Visitors to the Outdoors"

Countryside activities



Countryside Recreation Network bdrcc continental 12
File location: rre_name (including version)/Author: Initials/Support Initials/Date

Countryside inactivities?



Countryside Recreation Network bdrcc continental 13
File location: rre_name (including version)/Author: Initials/Support Initials/Date

Communications guidelines

Focus on relevant consumer segments

Words help convey information / Pictures shift perceptions

Use specific images to differentiate, but compelling trumps different, and credible trumps both:

- Site / place
- Activity
- People

Familiar v novel/surprising, but avoid stereotypes

People use internet search and/or third-party sites for ideas

People use site websites for product details

Communicating countryside recreation

Branding can reinforce word of mouth

Branding can provide an identity wrapper for the development of news and features – PR

Branding can provide a common platform for special offers and joint promotions

Branding underscores advertising activities by single operators or by operators in co-operation

Branding the countryside is important

To producers:

- How will suppliers be able to communicate to prospective users/visitors where to go and what is there?
- How will suppliers be able to band together to provide a comprehensive offer to prospective users/visitors?
- The countryside is diverse; any of its competitors are apparently more coherent.

To users/visitors:

- How will prospective users/visitors know where to go?
- How will recent users be able to share their experiences with their friends?
...People value recommendation – word of mouth – and this is its feedstock.

Branding the countryside

Countryside recreation is competing for consumers' time, money and attention

Branding can be a key tool



How will the abolition of England's RDAs and the eventual and diverse emergence of LEPs affect geo-specific marketing?

Contact



Case Study 1: British Waterways

**Angela Groves
British Waterways**

British Waterways established the Inland Waterway Visits Survey (IWVS) in 2003 to monitor use of its waterway network. Respondents are asked about visits made in the last two weeks. A nationally-representative sample of 480 adults is interviewed in each half monthly period. The questionnaire is executed using CATI (Computer Aided Telephone Interviewing). A Random Digit Dialling (RDD) approach is used. This is a system which offers a totally geographically un-clustered sample; vital since an individual's usage of waterways is determined in part by their proximity to waterways (either living or working).

The scope of the IWVS has expanded and is now a core survey for BW reporting on:

Volume – total visits to the BW's canals and rivers as well as the number of people who visit

Satisfaction – ratings of the experience of those visiting BW's canals and rivers

Value – economic contribution made by those visiting BW's canals and rivers

Marketing and communications - attitudes towards canals amongst the general public

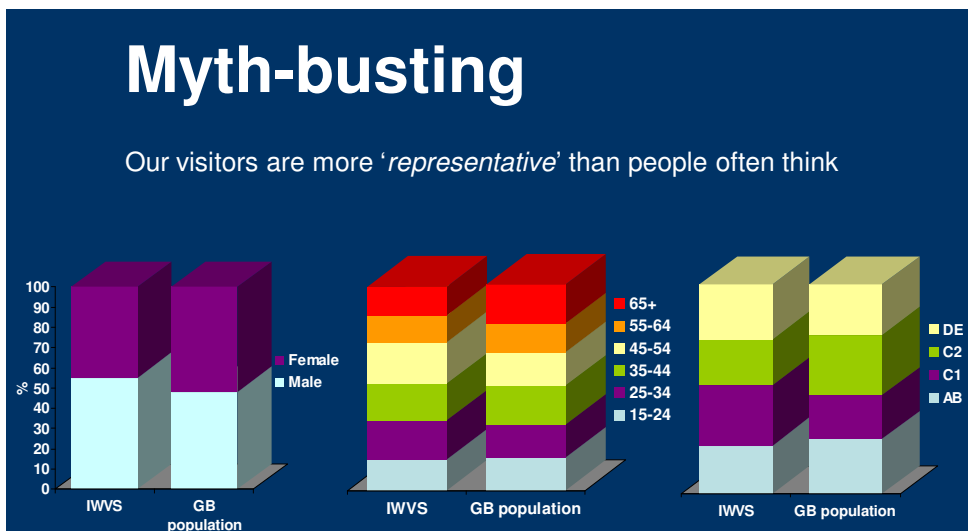
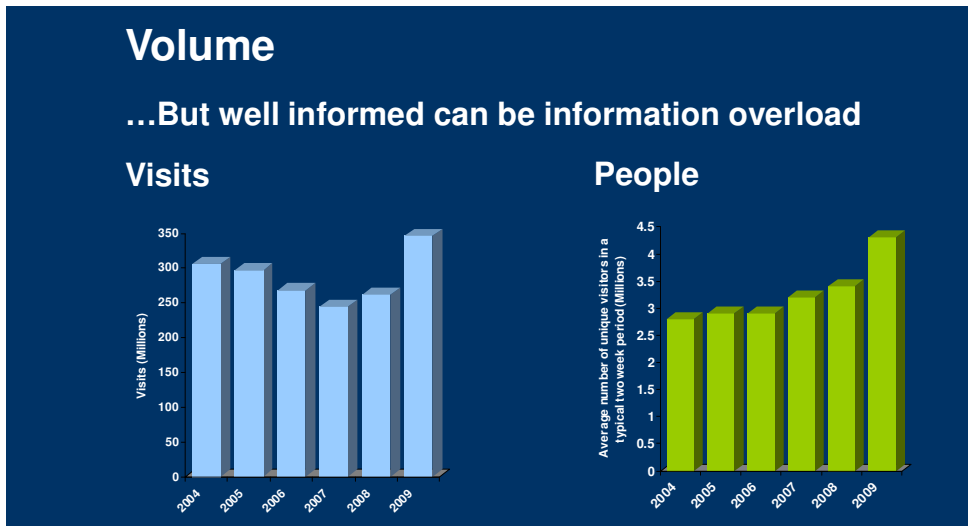
This presentation covers the approach taken by the survey, how it is used by BW, and experience and learnings for the future.

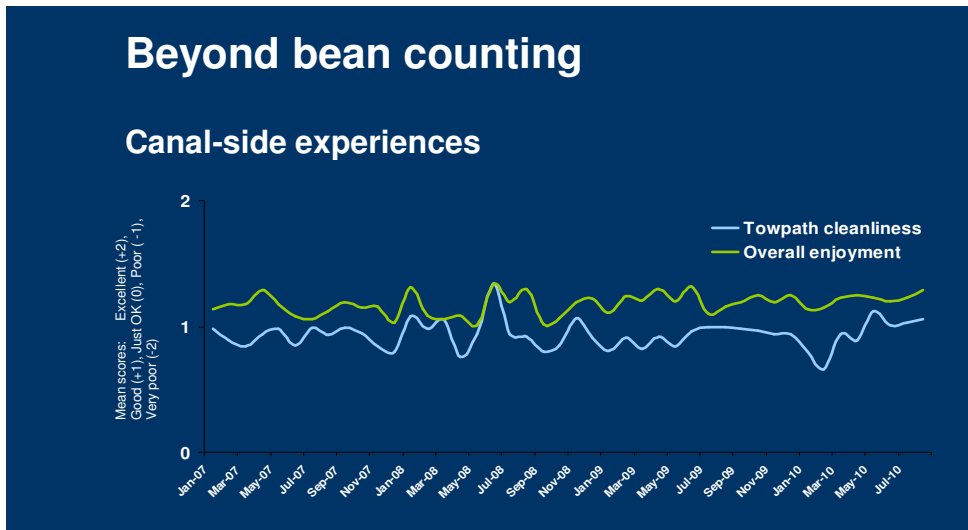


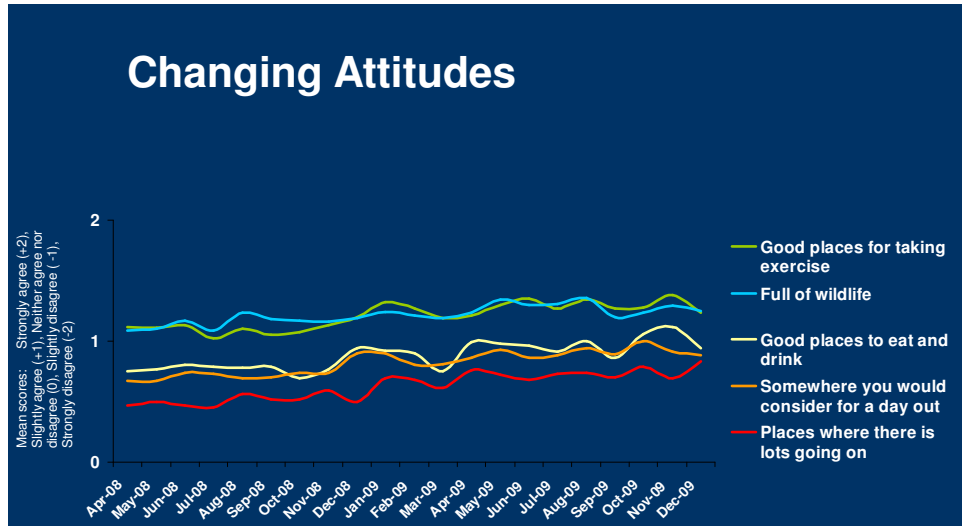
Approach

- Originally designed to quantify and monitor participation in activities along British Waterways' navigations
- Established in 2003, continuous data since 2004
- CATI
- Speak to just under 1,000 people each month
- A nationally representative sample
- Two-week recall
- Operated by BDRC









Counting the pennies

1. Fundraising potential
2. Economic benefits



Final thoughts

- Simplicity
- Limitations
- Value
- Common sense
- Champion

Case study 2
Lisa Muller
Sustrans

The National Cycle Network (NCN) has been “developed” by Sustrans, the country’s leading sustainable transport charity. Our vision is a world in which people choose to travel in ways that benefit their health and the environment. This means that the focus of our work is on increasing the amount of walking and cycling people do.

One aspect of this work is creating the right physical environment for people to walk and cycle. The NCN was initiated in 1995 and is now over 12,600 miles long. It passes within a mile of 57% of the population (over 32 million people).

Sustrans are continuously working on ways to evaluate how and by whom the NCN is used. Our work over the years has demonstrated that it is not only a network heavily used by leisure cyclists for challenges and holidays, but also provides crucial links and infrastructure for everyday journeys.

In this presentation we will look at some of the most recent evaluation findings as well as future plans for research on the NCN and similar networks.



Monitoring the National Cycle Network

CRN, Sheffield, October 20th 2010

Lisa Muller
Sustrans' Research and Monitoring Unit



Overview

- Introduction
- Monitoring tools
- Data interpretation
- Looking forward



Introduction

- Sustrans began work on creating The National Cycle Network in 1995
- The National Cycle Network:
 - extends to some 12,600 miles
 - passes within a mile of 57% of the population of the UK
 - carries around one third of the number of journeys made on the UK rail network
- Sustrans reports annually on the use of the National Cycle Network



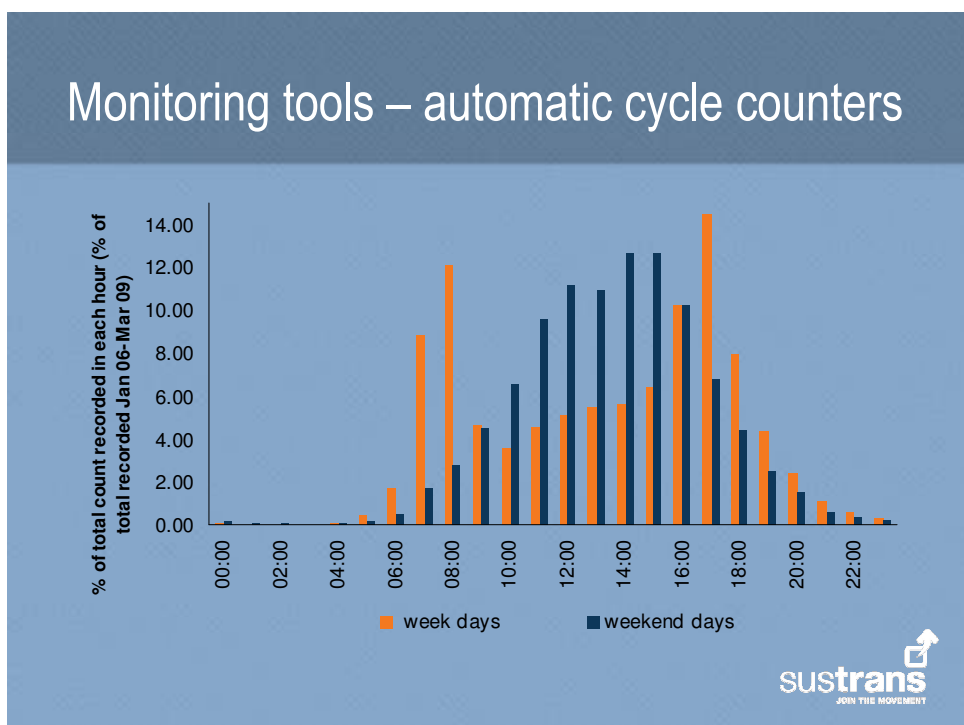
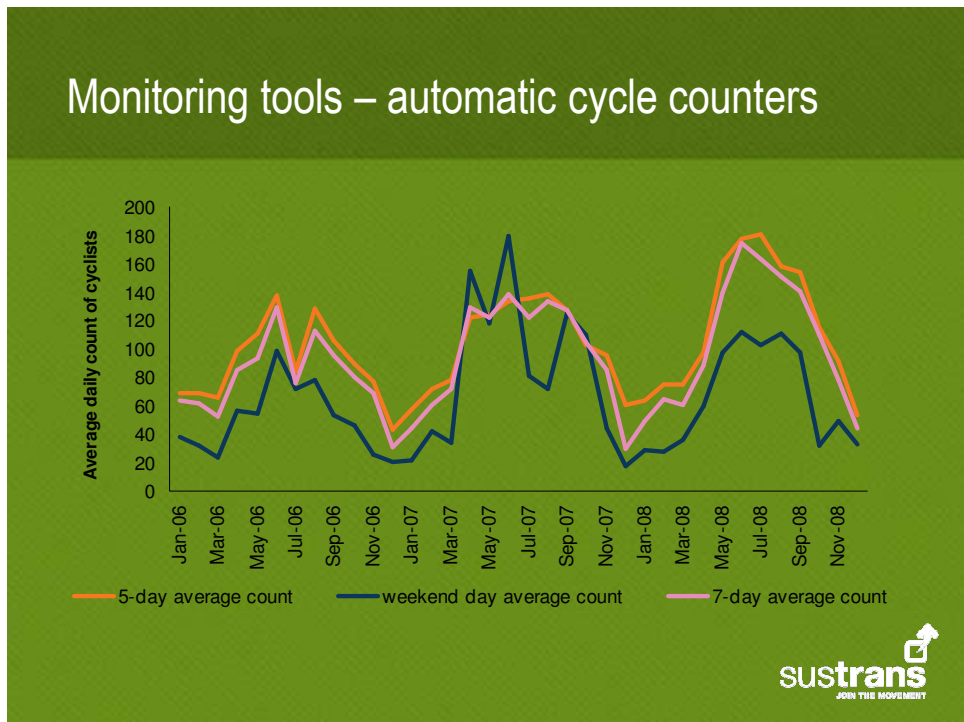
Monitoring the National Cycle Network - overview

- The key tools used in monitoring the Network are:
 - Automatic cycle counters
 - Manual counts of users
 - Intercept surveys of route users

Monitoring tools – automatic cycle counters

- We hold data from a network of over 1,200 automatic cycle counters across the UK
- Data are continuous counts of cyclists
 - Average daily flows of cyclists
 - Daily distribution of counts





Monitoring tools – route user surveys

- 1) A manual count of all route users, used to generate an estimate of annual use at the survey location
- 2) An intercept survey of route users to tell us information about the users of the route –
 - Have they used any other transport?
 - What is their journey purpose?
 - What factors influence their decision to use the route?
 - How active are they?



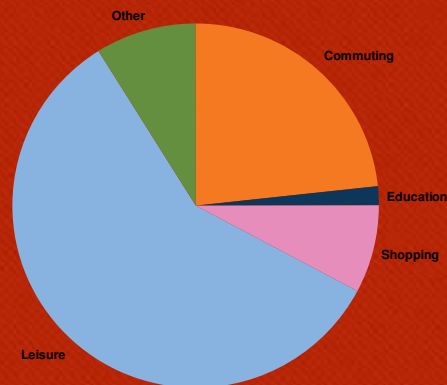
Data interpretation – annual usage estimate

- Automatic cycle counters are used to estimate the overall number of journeys on the Network
- During 2009:
 - **407 million** walking and cycling journeys were made
 - **208 million** of these journeys were by bike, and **199 million** by foot (over **3 million** users)
- Data collected through route user surveys tells us more about use of the Network



Not just a leisure network

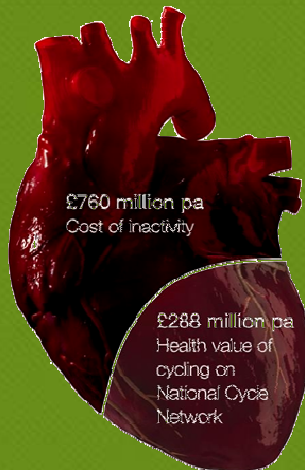
- In 2009 95 million commuting trips were made – nearly a quarter of all the journeys made on the Network
- Approximately 58% of trips were for leisure
- 11% of cyclists were new or returning to cycling



Decarbonising local travel

- The National Cycle Network carried over one million journeys every day. If each journey replaced a car trip, the potential carbon saving is 625,000 tonnes per year
- 79% of trips were made by foot or bike alone – zero carbon from beginning to end

Improving health through active travel



Source: Derived from Department for Health, 2009 (Cost of physical inactivity for each primary Care Trust in England is £5million. At September 2010 there were 152 Primary Care Trusts in England.)

the total health benefit to users of the National Cycle Network during 2009:

- cycling trips - £288 million
- walking trips a potential health benefit of £96 million
- over 2 million people were more physically active.



Beyond usage estimates – economic impact

- Sustrans are striving to understand more about the economic impact of the Network
- A study was performed in 2006 of the economic impact of four key routes in the North East
- Route users contributed £9.6 million of direct expenditure to the North East economy
- Route users from outside the region visiting the North East generated £5.9 million



Looking forward

- What next?
 - Improving our methods of overall usage estimation
 - Expand data collection for pedestrians
 - Develop methods for understanding end to end usage of routes
 - Develop tourism model to better understand economic impact of leisure routes



One small step.
One giant leap.



Case Study 3
Laura Irvine
National Trust

Segmentation is all about recognising different types of people so we can better identify and meet their needs.

Nearly four years ago now, the National Trust developed its own segmentation of the Days Out market; initially this was used to think about visitors to our houses and gardens; since then we have evolved it to understand visitors to our coast and countryside places too.

The National Trust work extensively to understand the different types of visitors to their places and have developed a bespoke segmentation of UK adults based on their mindset and motivations for visiting. Laura will discuss how this perspective has been used to distinguish the differing needs of countryside visitors and the benefits an outdoors experience can bring to them. Drawing on qualitative and quantitative research conducted with visitors to National Trust outdoors places Laura will highlight some of the common responses and some of the distinctive characteristics of the different visitor types. She will also consider ways in which the recent MENE data is helping shape the National Trust's approach to visitors outdoors as the organisation makes efforts to build more awareness of their outdoors places and to enhance the visitor experience at their many coast and countryside properties.

Who visits, and why?

Laura Irvine, Segmentation Manager
National Trust



Outdoors visitor responses

Outdoors is enormously powerful

Outdoors provides escape and context for life

Outdoors is anywhere without a roof

The National Trust gets little credit for its work outdoors

Do's and Don'ts are unclear



These are some of the key messages that we've heard in talking to outdoors visitors: Outdoors is enormously powerful - people have very strong emotional attachment to the outdoors, this is something that is "hard-wired" in them, it's instinctive and immediate. Outdoors provides context for life - being outdoors is about putting yourself in context with the landscape, positioning yourself in the world. The ultimate experience of this is being on top of a mountain. Many do not have the time or where-with-all (or perhaps overt ambition) to climb the mountain, but instead seek "proxies" for this in whatever situations they can find. This means that they will grab whatever outdoor experiences they can – the more constraints on them, the more significant even the smallest, simplest experiences can be. Importantly for the Trust this means that any of our outdoor encounters are in some way fulfilling this basic need of our visitors – be that a coastal path, garden or even just looking out of the window at the landscape. Outdoors is anywhere without a roof - for the visitors there is no real distinction between built properties and outdoors, between pay to enter and free to visit – all outdoor opportunities are part of the continuum of experiences. To communicate with them well, we need to start seeing places through their eyes and re-evaluating how we classify them. The Trust gets little credit for its work outdoors – Cinderella syndrome - currently little of the good-feeling people get from outdoors is transferred to the Trust. Even if they are aware of the Trust's ownership (through the Omega sign), this is more likely to imply "restrictions from the land-owner" than "access facilitated by the enabler" in their perception. Do's and Don'ts are unclear – facilitating activities give a strong subliminal message

Fiona's vision for outdoors



Fiona Reynolds
Director General
National Trust

"people will recognise and join us as much for our work in the countryside as for our houses and the built environment"

"a change in the way people see and support us, both in terms of what we do, and our relevance and appeal to a wider range of people"

"a shift from just 'conservator' to 'enabler' – providing opportunities for people to experience and enjoy outdoors in ways they want to"

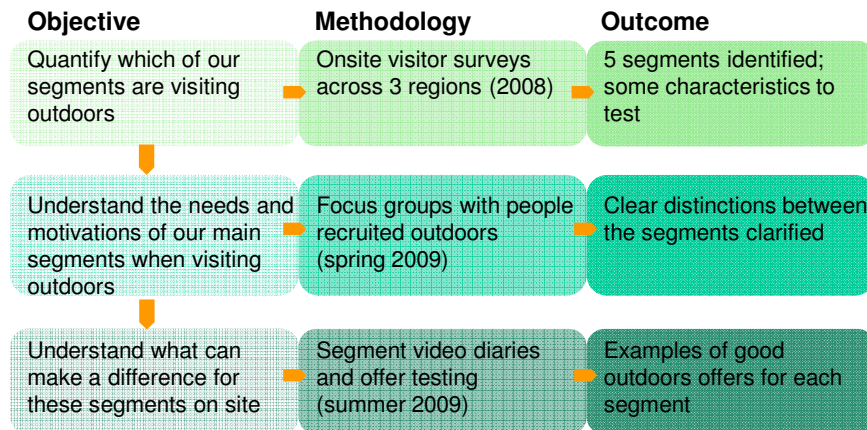
"a new, more sustainable business case for our work at non pay-for-enter properties"



In 2009 Fiona Reynolds, Director General of the National Trust, set out our "Vision for the Outdoors" These are a few statements from that vision. *"people will recognise us as much for our work in the countryside as for houses and the built environment"*

Perception tracking shows us that currently 80% of the UK public think of us in relation to houses and gardens; just 30% associate us with coast and countryside. We want to equalise these perceptions. *"a change in the way people see us, both in terms of what we do, and our relevance and appeal to a wider range of people"* We have 17.5m visitors to our houses and gardens, but outdoors we have in excess of 100m (can't say exactly how many); furthermore, whilst three of our seven segments dominate our houses and gardens visitor profiles; there are five segments dominant in our outdoors visitors – so it's not just more people, but different types of people too that we can engage with. *"a shift from 'conservator' to 'enabler' – providing opportunities for people to experience and enjoy the outdoors in ways they want to, with excellent conservation as the means not the end"* Our conservation work is still essential as this is what our brand is based upon. When people know somewhere is owned by the National Trust, they assume they will find it very well looked after. *"a new, more sustainable business case for our work at non-pay-for-enter properties"*. We're not proposing putting pay barriers up in the countryside, but we do need our work to be fairly self-supporting. We will actively look for ways to meet visitor needs with offers that are attractive enough to be worth paying for.

Outdoors Audience Research



A summary of some of the research work that we've carried out with outdoors visitors:

1. Quant – to get an assessment of the proportions of each of our visitor segments that we find outdoors. For this we stood with clipboards in a variety of countryside settings, from the slopes of Helvellyn to the beach at Rossili and asked, amongst other visit-related questions, our “golden questions” which help us identify segments.
2. Qual – focus groups with the five main segments we found outdoors to understand what outdoors means to them and what a great visitor experience for them would be.
3. Further qual work looking at specific outdoors offers – which are most appealing to whom?

Days out motivational segments

•Motivation

- Further Left: Want a social day out
- Further Right: looking for something more challenging and stimulating from their day out

•Mindset

- Towards the top: Knowledgeable, confident, self-sufficient. Less influenced by other people's opinions and eager to have new experiences
- Towards the bottom: Strongly influenced by the opinion of others, risk adverse, following the mainstream. Require significant persuasion and endorsement to try new experiences



This is the framework we use for thinking about our visitors; it is our picture of the 42m adults in the UK who make up the Days Out market.

It works for coast and countryside just as well as it does for houses and gardens

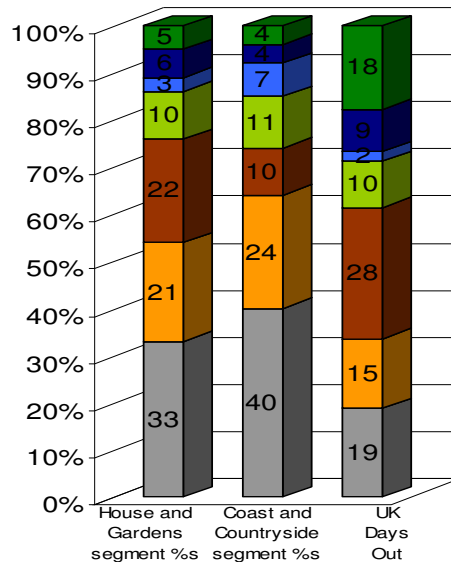
The arc has 2 axes:

– along the bottom people range from being “socially motivated” (their primary reason for going out for the day is to spend time with friends and family) through to “intellectually motivated” (they chose their day out because of the mental stimulation it will give).

- the side axis takes us from “outer motivated” people at the bottom (they don't like to move outside their comfort zone and will need strong recommendation from a trusted source to try something new) to “inner motivated” people (constantly on the search for new things and will not follow the crowd).

Our 7 segments range across these 2 axes.

"Who Visits and Why: Results from National Surveys of Visitors to the Outdoors"



This is the proportions of each of the visitor types that we see at our places. Curious Minds are obviously very important to us, 33% of our houses and gardens audience, but even more important outdoors where they are 40% of our visitors – and we see them all year round.

Explorer Families are also important, increasingly so outdoors as 24% of our visitors. These are families that like to learn together and they are very comfortable outdoors. Our Out & About segment surprised us outdoors – they're key to our houses and gardens visitor population at 25% but we see a lot less of them outdoors (just 10%), this despite the fact that they tell us they are “serious strollers”. We obviously haven't got the offer quite right for them, but it's worth us doing so as they represent 28% of the days out market (or 12m adults).

The other group to mention is our Young Experience Seekers, these are the 20ish to 30 year olds. They take fewer days out than the other groups but when they do, their preference is for outdoors. As a tight age band, they will be small in the whole population (2%) but at our outdoors places they make up 7% of visitors so are worth understanding more.

A few word clouds built from the segments' descriptions of their “perfect day out outdoors” should help illustrate the differences between these groups:

"Who Visits and Why: Results from National Surveys of Visitors to the Outdoors"



This is Curious Minds. They are the people who feel real ownership of places and talk about the rounded benefits of being outdoors – for mind, body and spirit. They can be serious walkers but often just as much enjoy sitting to take in the view.



Explorer Families love to be outdoors, it provides the “wholesome” day out that enables Mum and Dad to feel like “good parents”. It also gives them quality time doing stuff together and a chance for “accidental” learning with all the things they stumble upon.

"Who Visits and Why: Results from National Surveys of Visitors to the Outdoors"



Explorer Families love to be outdoors, it provides the “wholesome” day out that enables Mum and Dad to feel like “good parents”. It also gives them quality time doing stuff together and a chance for “accidental” learning with all the things they stumble upon.



Young Experience Seekers, the twenty-somethings, see outdoors as one big playground. They love to challenge themselves, but also to use landscape as a means of positioning themselves in the world – there can be a lot of depth to their experience.

"Who Visits and Why: Results from National Surveys of Visitors to the Outdoors"

There are two areas in particular where the MENE results are really getting us thinking ...

1. A perspective on visitor experience and financial planning

Very approximately, MENE shows 80% of outdoors visits are for less than 3 hours; 20% are for more than 3 hours. We classify a "days out" visit as being 3 hours or more away from home. The 3 hour division allows us to distinguish between amenity and days out visitors. By looking at the data on this split we can distinguish the different needs of these two types of visit.

4 out of 5 of visits outdoors which are for less than 3 hours and of an "amenity" purpose and unlikely to generate much income.

1 in every 5 visits outdoors are for "day out" purposes, last more than 3 hours and have the potential to generate income (although just less than 2/3 currently do).

the 20% of "days out" visitors offer:

- more opportunities to generate income
- a deeper experience in which we can provide more layers of communication eg, who we are, what we do, how they can support this, etc.

the 80% of "amenity" visitors offer:

- a continual reinforcement of their connection with a place or an outdoors experience (the research suggests that those who visit more often tend to be happier with their visit experience, this is a virtuous circle). Keeping this connection will enhance their experience and make it easier to please them when they chose a "days out" visit.
- A body of people who may have a special connection with a specific place (eg, a favourite retreat; their daily dog-walking route; a great place to play, etc.) and may therefore be able to help us manage it, eg, through active volunteering (conservation or visitor experience) or through helping us understand the importance of the place to local people and connect with the community through it.

Both groups are therefore very important to us, but each needs a different approach.

2. Campaigning messages

Each year the National Trust runs what we call "Lifestyle campaigns" – concentrating much more on what people are doing, encouraging lifestyle changes. Recently we've had "Food Glorious Food" (allotments at NT places, lots of talk of sourcing local food and free give-aways of seeds to encourage people to grow their veggies at home) and "Wild Child" (lots of activities to get children interacting with nature and going home muddy). We'd like to run a campaign focusing on encouraging people to get outdoors but it's difficult to know exactly what message to which audience will work best.

The MENE research has shown that pretty much everyone is aware that outdoors is a "good thing" but, for those that don't go outdoors more, the barriers are generally due to physical capability or lack of time. This really helped in our campaign message planning to move us from an "it's good for you" message (which is a bit preachy) to a "permission to recharge" message aiming more at encouraging people to prioritise the outdoors stuff they want to be doing as a vital means to relax and recharge, which aligns perfectly with the National Trust remit, since our origin over 100 years ago, of providing spiritual refreshment for all.

We'd be really interested to hear what you think of this interpretation of the data

Feedback from afternoon workshops

How can people use survey information?

- By sharing information with colleagues and Marketing departments
- By comparing information at site level or regional level
- By reinforcing existing ideas, with real, up to date, evidence
- By providing a national context
- National Benchmark
- By understanding trends to inform future thinking
- As evidence, advocacy, to obtain external funding
- To make informed decisions
- To prioritise spending
- To understand users
- Help in product development
- To find out the importance of local users
- Evidence for promotion and communication
- Equality agenda, to understand users and demographics
- To find out about group sizes
- To find out activity preferences

What other information do we need?

- More interpretation
- Find out what will be the potential for adding things to a site
- Up to the minute, seasonal trend information. Informed comparisons with other attractions
- Find out people's perceptions of what is an "Outdoor Experience"
- Find out what are the barriers? To help managers "remove" them
- When and why do people make the decision to visit/engage with the natural environment?
- Omnibus question on risk, accidents, in order to cross tab with activities
- Find out if people are willing to pay, and for what?
- Exploring what motivates people to value, but then also take action to care for the natural environment
- Where did people's interest in the environment come from?
- Can we analyse and filter by postcode, would the data be valid?
- Promote use of data by academia? Including menu of issues we need answers to
- Link to DEFRA study
- Visits by children/young people?
- Sustainable travel evidence
- Trend comparison with previous survey: ELUS report to be published on Natural England Website
- Understanding external factors: fuel, weather, child benefit
- Other attitudes and behaviours: segmentation

Appendix A

Programme

09:30 *Registration and Refreshments*

10:00 Introduction and welcome by Chair

10:15 **Keynote results from MENE survey**
Hazel Thomas, Natural England & Tom Costley, TNS

10:45 **Understanding what people want from the natural environment, using customer segmentation**
Alan Love, BDRC Continental Ltd

11:15 Questions & discussion

11:30 *Refreshments*

Case Studies: how to use the survey results in practice

12:15 **Case Study 1: British Waterways**
Angela Groves, British Waterways

12:30 **Case Study 2: Sustrans**
Lisa Muller, Sustrans

12:45 *Lunch*

13:30 **Case Study 3: National Trust**
Laura Irvine, National Trust

13:45 Case study panel discussion

14:15 **Workshop session:**
Delegates will be split into 3 groups to discuss how useful the survey results are, what other information could be collected and how they might use the results in their own organisations.

15:15 *Refreshments*

15:30 Feedback from workshops

16:00 Summary from Chair and close

Appendix B

Speaker Biographies

CHAIR

Glenn Millar- British Waterways

Glenn has been with British Waterways since 1978, initially working in freight transport and then recreation & tourism research. Glenn now heads up a small unit responsible for:

- assessing the economic and social impacts of waterway projects;
- securing external funding to support such schemes; and
- developing and managing projects under various EU trans-national programmes.

From 1994 to 1998, Glenn was Vice-Chairman of the Countryside Recreation Network. He is a member of the PIANC (Permanent Association of International Navigation Congresses) Working Group concerned with Economic Studies on Inland Waterways and is one of British Waterways' representatives on Voies Navigables d'Europe (VNE), a consortium of European inland waterway authorities with interest in the development of canals and rivers for tourism and heritage. Glenn holds a B.Sc.Hons in Geography, an M.Sc. in Town & Country Planning, a Diploma in Management Studies and a Diploma in Marketing.

SPEAKERS

Hazel Thomas - Natural England

Hazel Thomas has worked in the public sector for over 25 years, specialising for the last 20 in using public sector interventions to support rural/countryside/environmental initiatives in the West Midlands and Yorkshire and the Humber Regions, including as Regional Director of the Countryside Agency prior to the creation of Natural England. This work has been underpinned by 3 years post graduate research in countryside management in the North West of England. She currently heads up the Social Research and Information Services team within the Evidence Directorate in Natural England and is also an independent grants panel member for the Community Spaces grant programme run by Groundwork UK.

Tom Costley - TNS Research International

Tom Costley has over 30 years' experience in market research within the travel, tourism and leisure industries. Initially on the client side at the Scottish Tourist Board where he became Head of Research, responsible for the Board's research and planning budget, Tom was a member of CRRAG, the forerunner of CRN. Since 1986, he has worked on the agency side of the business providing research consultancy services to public sector organisations and private sector companies across the leisure, recreation, travel and tourism fields.

Tom is now Group Director, Head of TNS-RI Travel and Tourism in the UK, responsible for a team of around 20 researchers specialising in the travel, transport, tourism and leisure sectors of the economy. He is a Full Member of the Market Research Society and a Fellow of the Tourism Society. He is a regular speaker at conferences and seminars on the contribution which market research can make to decision-making within these sectors and is regularly used by organisations as a specialist advisor on their research needs. He has an MA (Honours) degree in Geography from the University of Glasgow and also undertook postgraduate research at the Centre for Urban and Regional Studies in the late 1970's on planning for recreation in the countryside.

Alan Love - BDRC Continental Ltd

Alan Love is Research Director in the Culture, Tourism and Leisure team at BDRC Continental. Alan has provided research consultancy for over 100 cultural and leisure attractions in the public, private and voluntary sectors, in town and country. He has undertaken research for trade bodies and for tourist boards too.

Alan's research informs decisions in site development and refreshment; product positioning, branding and marketing communications; visitor services and interpretation; strategy, finance and economic impact. Alan designs, manages and interprets qualitative and quantitative studies to measure and understand visitor and prospect behaviour and attitudes.

Alan is a Fellow of the Tourism Society, member of CIMTIG, member of Arts Marketing Association and Full Member of the Market Research Society. He has a BA in Business Organisation, MA in Marketing, MBA and Market Research Society Diploma. 25 of the 35 years of Alan's research career have focussed on leisure and travel. Having completed the Speyside Way and the Thames Footpath, Alan's current walking project is to fill in the gaps on the South Downs Way. Favourite walks: Seven Sisters circuit on SDW and Bridge of Orchy to Kings House on WHW.

Angela Groves - British Waterways

Angela is responsible for BW's insight programme. She manages Inland Waterway Visits Survey monitoring the volume and type of customer visits, customer satisfaction surveys and recently, research to inform BW's move from public sector to civil society.

Prior to joining BW, Angela worked for food and grocery think tank IGD. She conducted qualitative and quantitative research covering a range of topics such as health and nutrition, food labelling, demand for local food and general shopping patterns, for clients such as Muller Dairies, Defra, the Countryside Agency, Cadbury's, and the Scotch Beef brand. Before IGD, Angela spent time working for Campden and Chorleywood Food Research Association, and completed a PhD at Reading University investigating British consumers' attitudes towards British food.

Lisa Muller - Sustrans

Lisa Muller has undergone five years of university training in statistics and mathematics and has three years experience of applying research methods during a post graduate degree. She has worked on a variety of practical statistical projects in and outside the university, specifically in the field of urban and regional planning. She has experience in questionnaire design, sampling methodologies, data analysis and reporting. Lisa is responsible for the monitoring and evaluation of the Big Lottery Fund funded Active Travel Consortium, including the development and implementation of a monitoring and evaluation framework as well as coordination of data collection, analysis and evaluation of the project impact. The portfolio delivered by this consortium is funded for four years from 2008 and comprises 50 diverse practical projects delivered by six key walking and cycling organisations in the UK.

Within Sustrans' Research and Monitoring Unit Lisa contributes to the development of analytical approaches, introducing rigorous statistical methods and data collection tools and methods that lead to more robust analysis.

Laura Irvine - National Trust

Laura Irvine joined the National Trust in 2007 to manage the roll-out of their segmentation across the organisation. Initially concentrating on built properties this work has now extended to understand visitor experiences in the outdoors. Centrally based (in Swindon), Laura works with the Trust's properties, regions and functions to ensure widespread recognition and practical application of the insights about all our visitor segments. She has a background in corporate marketing, and was previously UK Marketing Manager for BP's LPG division. She has an MA in Archaeology and Anthropology and a Diploma in Marketing.

Appendix C



Countryside Recreation Network

Who Visits and Why? Results from National Surveys of Visitors to the Outdoors Attendance List

Tom	Costley	TNS Travel and Tourism
Glenn	Millar	British Waterways
Peter	Davey	Peak National Park Authority
Kenneth	Dodd	Ken Dodd Associates Limited
Fiona	MacKenzie	West Berks District Council
Louise	Dowrick	Essex Wildlife Trust
Jake	Williams	Anglian Water Services
Josephine	Melville-	Forestry Commission
Lynn	Crowe	Sheffield Hallam University
Jackie	Denman	The Tourism Company
Angela	Groves	British Waterways
Joe	Roberts	Countryside Council for Wales HQ
Hazel	Thomas	Natural England
Michael	Stery	Lee Valley Regional Park Authority
Laura	Irvine	The National Trust
Alan	Love	BDRC Ltd
Tony	Berry	The National Trust
Donna	Beech	The Camping and Caravanning Club
Andrew	Jones	The Camping and Caravanning Club
Kevin	Appleton	Anglian Water Services
Mallika	Nillorm	University of Portsmouth
David	Alexander	Peak District National Park Authority
Dan	Barnett	Exmoor National Park



Countryside Recreation Network

**Who Visits and Why?
Results from National Surveys
of Visitors to the Outdoors
Attendance List**

Ruth	Williams	The National Trust
Vicky	Wilkinson	The National Trust
Emma	Fernandes-	RSPB
Sarah	Douglas	Red Kite Environment
Ellie	Collier	The Steel Valley Project
Lisa	Muller	Sustrans