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CAN 10 YEARS OF RECREATION TRENDS HELP US PREDICT THE FUTURE?

Full Journal available exclusively to ORN Member Organisations.

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[Belinda Dixon, Writer, Trainers, Ordnance Survey GetOutside Champion](#)
- CASE STUDY: DARTMOOR 'NATURALLY HEALTHY'
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(To find out more about becoming a member of the Outdoor Recreation Network please email: enquiries@outdoorrecreation.org.uk)

Cover Picture: Delegates standing on top of Haytor at sunset during the October 'Outdoor Recreation 2030: Future Trends & Insights' Conference.

Just how good was the sunset? Check out this picture!



FOREWORD:

“OUTDOOR RECREATION 2030: FUTURE TRENDS AND INSIGHTS”



ORN Chair - Fiona Groves
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The Outdoor Recreation Network (ORN) has the vision of encouraging more people to enjoy and engage with the outdoors. Our members from across the United Kingdom and Ireland work in collaboration to help share research, facilitate information exchange and champion sustainable good practice.

ORN grew from a common interest of those seeking to share and improve opportunities to access the outdoors and evolved from the work of the Countryside Recreation Network that was established back in 1968. Our current members are researchers, enablers, providers and practitioners, all committed to providing diverse and immersive experiences in the outdoors, something we are proud to build on.

As recently appointed Chair of ORN, this is an exciting time to play a key part in leading the growth and future development of the Network. There has been a real recognition over the years of the value of giving people connections with the outdoors, access to healthier lifestyles and to a range of environmental and community benefits.

In addition to training events (conferences, seminars, workshops and site visits etc), the ORN Journal has long been an established way for the Network to disseminate the latest research, good practice and case studies in the outdoor recreation sector.

This edition of the Journal emanates from our Autumn 2019 conference hosted by Dartmoor National Park Authority on the theme of “Outdoor Recreation 2030: Future Trends

and Insights”. The conference brought together key leaders, policy-makers and researchers to consider:

- What past and current trends in outdoor recreation tell us about how to prepare for the future?
- What determines the next “big thing” in outdoor recreation?
- What role will the outdoors play in contributing to good health and wellbeing?

A special thank you to Pippa Langford (Principal Specialist Recreation and Access, Natural England) who is a member of the ORN Executive Committee for editing this Journal edition and to all the contributors to have much to offer in helping us to better understand future trends and insights. Their articles will help us to:

- Reflect and review changes in outdoor recreation over the last 25 years.
- Consider changes and emerging trends in how people chose to spend their leisure time.
- Assemble future predictions about emerging trends and the next “big thing”.

Given the pace of change in the sector (as exemplified by the current Covid-19 situation), this is a timely discussion on the importance of planning and managing future challenges and opportunities.

FOREWORD:

On the cusp of 2020's it feels particularly relevant to be publishing a journal based on some of the presentations at The Outdoor Recreation Network conference 'Outdoor Recreation 2030: Future trends and insights'. Whilst we can't guarantee a 20/20 vision of the future, the journal should provide useful thoughts and insights from leading professionals that will help policy makers, and all organisations and businesses involved in outdoor recreation, to plan for the future.

Duncan Stewart's article looking back over the last 10 years of data provides useful insights into how patterns of outdoor recreation have changed, how more people are getting active outdoors, and how many are staying closer to home but there are key groups who are not getting the benefits of being active outdoors. Interestingly Lee Newton discusses the use of technology in the future. I was someone who originally discarded the idea of online maps as something for people who couldn't read a paper map properly, but now I'm an avid fan of OS and other online maps so this discussion is an exciting insight into what gadgets and apps might be available to enhance everyone's outdoor experience in the future. I have already incorporated some of Lee's ideas into my work, attempting to make it possible for digital innovation to be mainstreamed rather than held back by future funding mechanisms.

For many of us the question we are often asked is about the evidence of what works. Two articles address this topic, Mike McClure writes about the Benefits of Outdoor Sport for Society (BOSS) project which involved teams and case studies from across Europe, and Orlando Rutter writes about the Naturally Healthy project in Devon. Orlando's article is about a local case study and shares learning that could be applied across the whole of Great Britain and Ireland – the government structures may be different but I think the lessons about engaging people long term will be useful everywhere. The BOSS project demonstrates how outdoor sports can benefit people from different social backgrounds and situations. Both projects provide insights into how to answer those questions about the value of outdoor recreation in ways that are robust and can be used with a range of funders and stakeholders. Links are provided to further reading and toolkits.

Finally, Belinda Dixon writes about how marketing and media can affect outdoor trends, reflecting that many outdoor activities have been popular for hundreds of years, if not longer. Belinda provides a helpful Aristotelian analysis of what is required for a message to engage people, but then applies this to modern communications, particularly social media. Belinda poses the question, does social media create a trend or reflect it? And if we are all influencers now, or we could be, where should we be putting more resource in our communications?

To conclude, at the end of a decade this is a timely journal, and an opportunity to reflect that some things have improved since 2010. More people are getting active outdoors than they were 10 years ago. Which leads to my final thought, if we were to predict what we would have liked to have done or changed by 2030, what would we have achieved? And what does that mean for what we do now?

If you would like further insights in 2030 then you can also watch some of the presentations via the [Outdoor Recreation Network YouTube Channel](#) or view the presentations via [OutdoorRecreation.org.uk](#). If you are wanting to think more about how to prepare for the future then I recommend attending future ORN Conferences and Workshops. These are a great opportunity to meet the speakers and ask further questions and discuss issues with expert colleagues. I look forward to seeing you there, please say hello and I'd love to hear what you think of this edition of the journal.



Journal Editor - Pippa Langford
ORN Executive Committee Member
Principal Specialist in Recreation and Access,
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CAN 10 YEARS OF RECREATION TRENDS HELP US TO PREDICT THE FUTURE?



Article by: Duncan Stewart
Managing Partner, 56 Degree
Insight

The amount and quality of data available on how the GB population engages with nature and participates in outdoor recreation is better than ever before. In September 2019 Natural England published their tenth annual report from the Monitor of Engagement with the Natural Environment (MENE), a major study which tracked how the English population spend time outdoors over the last 10 years (involving over 468,000 interviews) and in Scotland fieldwork is ongoing for the latest wave of SNH's Scotland's People and Nature (SPANS) study which provides trend data going back to 2003. Many other studies support and add colour to these insights, from the long running domestic tourism trackers commissioned by the national tourist boards to studies which focus our wider relationship with the natural environment.

This paper explores some of the key trends which have emerged from these various sources with a focus on the changes seen over the last 10 years.

Macro trends which set the scene

Before we dive into the outdoor recreation trends, it is helpful to consider some of the broader macro changes which are influencing how we participate and our attitudes to spending time in nature. We have summarised these under 8 broad headings:

1) Demographic changes

The shape and size of the UK's population is changing, increasing by 8% in the last decade and predicted to grow by a further 6% by 2030 (1). The population is getting older - in 1998 1 in 6 people were aged 65+ but by 2038 1 in 4 of us will be in this age band. The population is also predicted to become more ethnically diverse with the Black and Minority Ethnic population predicted to grow from 14% of the GB population in 2011 to around 21% in 2030 (2).

2) How and where we live

Linked to these demographic changes and some of the economic challenges predicted, how we live is also changing. More people are living alone (4) and more households have 3 generations living together. And with more young people experiencing difficulties getting on the property ladder (4), more live at home until they are older. Also, the population of urban areas is growing at the fastest rate - specifically the population of London is projected to grow more rapidly than any other part of the country (5).

3) Economic uncertainty

Following the economic downturn that began in 2008 we have gone through a long period of austerity. After the 2008 crash GDP took around 5 years to recover to pre-recession levels and our real earnings continue to struggle to keep up with prices (6). With Brexit on the horizon there are predictions of lower growth or even a new recession, potentially leading to decreased opportunities and growing inequality.

4) How we work

Reflecting the aforementioned demographic and economic challenges, older people will work for longer (7) and increasingly employment will be on a more fluid and flexible basis. There are predictions of a reduction in routine and manual tasks in the workplace as more of these become automated whilst more of us will work in service industries in more creative and problem-solving roles (8). Increasingly we hear arguments to move to a 4-day week more suited to today's work and life demands (9). Benefits cited include reducing work-related stress, better productivity on the days we are working and potentially more free time for us to escape to the natural environment on long weekends...

5) Health and wellbeing

With the ageing population we see increased pressures on the NHS and social care but the way we live is also having a negative impact on the population's health. It is predicted that by 2030 a third of the population will be obese – possibly leading to health complications such as diabetes, heart disease or cancer (10). We also see a rise in mental health issues with 21st century life taking its toll and the rising expectations of what life should be like, social media, economic uncertainty (11).

However, at the same time there is increasing demand for products and services which promote health and wellbeing. Healthy eating, sport and exercise have become big business (12) and those who can afford it are increasingly seeking products which are promoted as good for them – whatever the latest super fruit is!

6) Environmental concerns

Levels of concern over the natural environment and the steps people take to protect it are also changing. Further details on what the survey data shows are provided below but, in summary, the amount people care about the environment has not moved greatly in the last decade (13). This lack of change is perhaps due to the 'distractions' of other issues like the economy or Brexit (14). Furthermore, while many people claim that they care about protecting the environment, the actions they take do not always reflect that concern.

7) The ongoing digital revolution

This is another fast changing area, impacting on how we interact with one another and with the organisations that we deal with. While there are many positives from increased connectivity such as bringing individuals together, sharing ideas and e-commerce, we also see potential issues such as the rising prevalence of fake news (15), people becoming more tribal in their views and the possible negative effects of too much 'screen time'.

8) Growing inequality and divide

Cutting across all of these areas we see signs of growing inequality and divisions in society. In economic terms, the income of high income households is rising faster than lower income households and regionally some parts of the UK are predicted to benefit more from the changing ways we work (particularly the London and South East) (16). Related, we see how obesity and other health issues are highest in the most deprived areas. This is leading to shortening life expectancies: those people in the most affluent social classes live an average of 7 years longer (17). And the last 3 years of Brexit 'debate' has exposed a nation that often feels divided culturally, particular by attitudes to identity and place and this is reshaping traditional political lines.

Outdoor recreation trends over the last 10 years

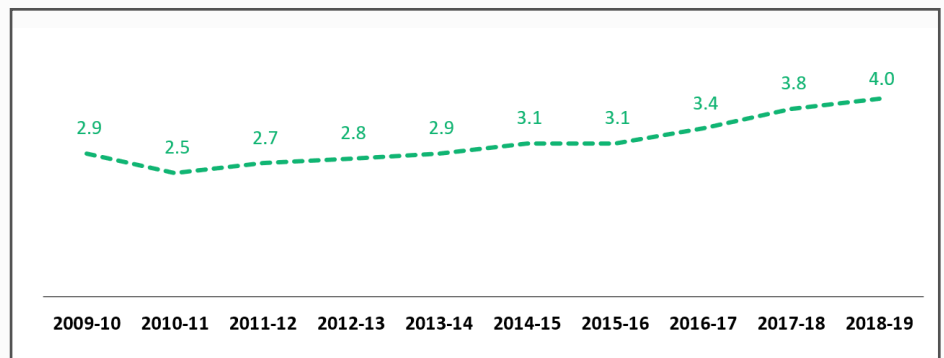
So within this context, how has our engagement with outdoor recreation changed over the last 10 years?

More of us are visiting the outdoors more often

In 2009 54% of adults in England visited the outdoors at least once a week but that increased to 65% by 2019 (13). A similar trend was recorded in Scotland (from 44% visiting weekly in 2006 to 57% in 2017/18) (18).

Fig 1 - Annual volume of visits to natural environment by adults live in England (billions)

Fig1.
Source: MENE 2009/10 to 2018/19



We are taking more short, close to home visits to urban greenspaces

MENE has also recorded a particular growth in the amount of time we spend in urban greenspaces like parks and playing fields. Related, the visits we take are increasingly likely to be close to home, taken on foot and shorter in duration (13).

Fig2.
Source: MENE 2009/10 to 2018/19

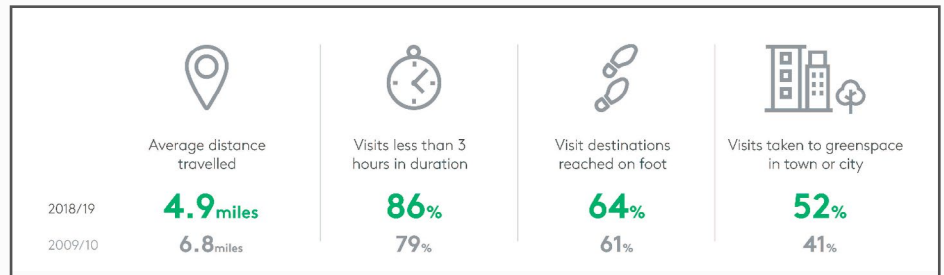


Fig 2 Changes in distances travelled, visit durations, transport mode and place visited on visits to the outdoors in England

Again a similar trend was measured in Scotland where the SPANS survey also measured an increasing share of outdoor visits taking place in outdoor places (from 30% of the total in 2004 to 40% in 2017) and more taken on foot (from 50% to 69%).

More of the time we spend outdoors is motivated by health and wellbeing

When we visit the outdoors this is increasingly likely to be for health and exercise reasons or to relax and unwind (13). A good example of how this trend has changed things is the success of ParkRun – it started with a group of 13 runners in 2004 and 15 years later has 2,000 events around the world and 4 million participants!

Fig 3 Changing reasons for taking visits to the outdoors in England - ‘health and exercise’ and ‘relax and unwind’

Again there is a similar trend in Scotland over the same period (18) and in both Scotland and England the increasing importance of health has been particularly pronounced amongst older age groups. So we have an ageing population but also, at least in some cases, a more active population aware of the health benefits of exercise for their body and mind.

Domestic tourism has grown, especially short breaks to the countryside and coast

With 2 in 3 domestic holiday bed nights spent in places in the countryside or by the coast (21), domestic tourism trends also have a clear impact on how much we spend time outdoors enjoying nature.

Following the economic downturn in 2008 we saw a dip in consumer confidence as people had less disposable income and the costs of travelling overseas increased (20). With this trend we saw a clear change in how UK residents holidayed with more taking holidays in the UK (21) while fewer took

holidays overseas (22) - this became known as the staycation trend. An interesting element of this trend was that even when confidence returned and people started to holiday overseas again, the trend for taking short breaks at home continued. So in this respect it could be argued that UK tourism benefitted from the downturn and the population benefitted by spending more time enjoying our coastal and countryside destinations. The question is whether this pattern would be repeated during any future economic downturn, or if travelling overseas was to become more expensive or complicated following a departure from the European Union.

Fig 4 Consumer confidence and domestic and overseas tourism trends amongst GB population

Fig3.

Source: MENE 2009/10 to 2018/19

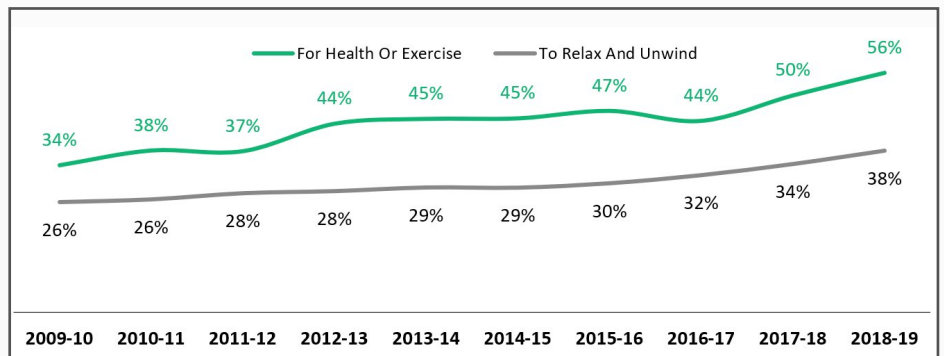
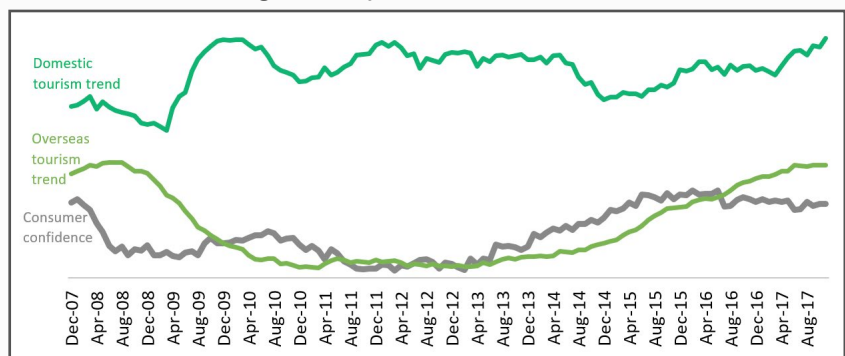


Fig4.

Source: Eurobarometer Consumer Confidence, GB Tourism Survey, International Passenger Survey



Children spend the most time outdoors, but this may be starting to decline

In England children typically spend more time outside than adults (on average around 70% aged 6 to 15 are outside at least once a week) (13). How and why they spend time outdoors changes with age with overall levels of participation peaking at around the age of 6 or 7 but dropping off into teenage years (this reflects other insights which suggest a general decline in nature connection in the teenage years (25)). Motivations for being outdoors also change with age from play and family time in early years, to engaging with nature and wildlife in primary school age groups, to sport and physical activity and spending time with friends away from adults as they approach and enter teenage years.

Fig 5 - Proportion of children living in England visiting the outdoors and top motivations by age

But over the 5 years we have operated the MENE kids survey, it has recorded some declines in participation levels amongst children. The proportion spending time outdoors with adults dropped from 79% to 72% overall between 2015 and 2019 but with sharper decrease amongst those in the less affluent social classes and living in urban areas. We also saw a drop in the proportion of children spending time with their friends outside, unaccompanied by adults, especially in the 10 to 12 age group. This trend could reflect how changing digital behaviours are influencing how children spend their leisure time and interact with friends. Over the same period Ofcom reported increasing numbers

of children aged 12 to 15 playing games online with friends and most children aged 13 and over now have a social media profile (23).

A changing relationship with nature

The last 10 years of data from MENE show that there is a link between how often people spent time outdoors and how much they care about protecting the environment (13) and in the last 2 years levels of concern about the natural environment, climate change and a loss of biodiversity have started to increase – possibly driven by programmes like Blue Planet II and the coverage around Greta Thunberg and Extinction Rebellion. However, the population continues to spend much more time worrying about other issues, in particular the economy and Brexit (14).

Fig 6 - Proportion of English adult population concerned about Biodiversity loss

Fig5.

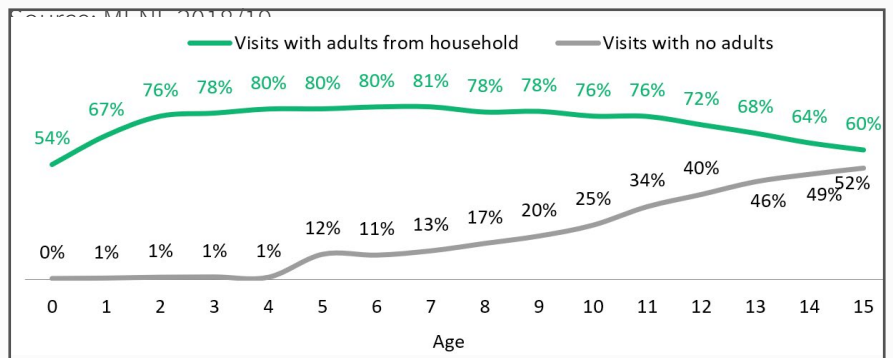
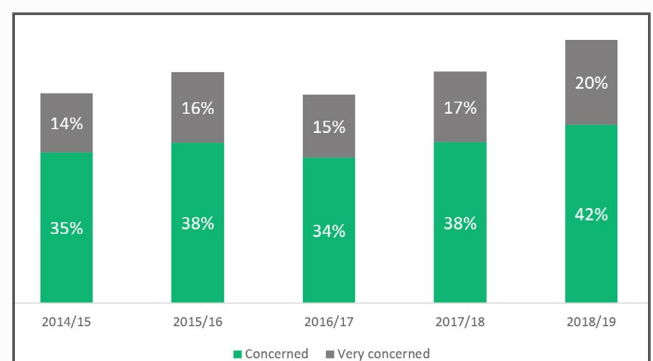


Fig6 Source:
Source: MENE 2018/19 Survey



However, it is notable there remains to be a significant gap between the proportion of us who claim to care about the environment and the proportion who are willing to take action to protect it. In 2018/19 around 90% of the adult population in England indicated that they cared about damage to the natural environment yet other than recycling, fewer than half of us took any actions to protect nature (13).

A risk of growing inequality

Whilst at an overall population level more of us are visiting the outdoors more often and gaining the benefits that time in nature brings, there continues to be significant demographic inequalities in participation levels. Both adults and children in the less affluent socio-economic groups, residents of more deprived areas, people with a black or minority ethnic background and the oldest age groups are significantly less like to regularly take part in outdoor recreation of any sort (13, 18).

Old age and ill health are increasingly cited as a barrier preventing people from visiting the outdoors (13).

Also in England MENE has recorded a decline in the perceived quality of local greenspaces such as parks, possibly discouraging people living in local areas from spending time in these places (13). Other studies have reflected this finding, showing that minorities are marginalised in terms of access to green space and evidence that the quality of parks is worse in areas of lower income (24)

So what does this mean for the future?

The future is of course impossible to predict but our view is that the combination of macro and outdoor recreation trends seen over the last decade provide a clear case for the importance of providing opportunities for people to spend time outdoors.

The evidence shows that spending time outdoors is good for the body and mind, it can help us to connect with nature and promote levels of care for our fragile natural environment. Additionally, an increase in the numbers of people spending time outdoors could bring economic benefits and, with more equal levels of participation across socio-economic groups, an opportunity to tackle health inequalities.

The challenge is for government and policy makers to recognise these benefits and to provide the sector with the funding and support it needs to protect, develop and promote our parks, urban greenspaces, countryside and coast for the next decade and beyond!

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