Countryside Recreation Futures: A Literature Review for CRN

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1.0 INTRODUCTION

'Tourism and outdoor recreation is one of the most important and rapidly growing service industries throughout the World' (Smith 1993 p.398)

Tourism is Britain's third largest industry, and it is worth over £37 billion. The UK tourism industry is estimated to employ more than 1.7 million workers (over 7% of the labour force) (CBI 1996). Given the obvious importance of this sector to the economy of the UK, it is essential that suppliers of tourism and outdoor recreation facilities/opportunities have a vision for the future of countryside recreation which is firmly rooted in forecasts from leading experts in the field. This will ensure that the industry will be able to meet the changing needs of the public and ensure their success as businesses by exploiting potential opportunities and preventing problems that could arise from unforeseen circumstances.

The aim of this report is to provide a review of literature that has been published on the future for countryside recreation in the UK, and to tie together the separate strands of research to present a coherent whole which will identify how patterns, demands and policies for countryside recreation may alter over the next 10 years. The potential agents of change will be discussed and their influence on the demand and practice of countryside recreation outlined. This information is essential in planning the future of the recreation and leisure industries, and taking appropriate policy decisions.

The report will concentrate on countryside recreation, covering all leisure activities taking place in the countryside, with a focus on those that rely on a countryside setting. However, comments will also be included relating to the likely implications for tourism and recreation on a more general level, since their future will impact on popularity and participation in countryside recreation itself.

Although the report considers the agents for change under separate headings, what is really required in forecasting changes for leisure is a holistic approach. At the end of the report alternative scenarios are considered for the future of countryside recreation. Scenarios that attempt to take into account information from all possible sources.

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2.0 SOCIAL TRENDS

2.1 Recent Social Trends

The sections below describe changes in society which are likely to have an impact on participation in countryside recreation and tourism in the UK.

Population Structure

Since the General Household Survey started in 1971, data collected have shown that the population of the UK is gradually ageing. In 1971, 4% of the population were 75 or over. This figure had increased to 7% in 1996. The retired population (counted here as 65 or over) made up 12% of the population in 1971, compared to 16% in 1996. Social Trends estimates that by the year 2040, roughly a quarter of the population will be over 60. This gradual increase in the number of older people will have obvious implications for participation rates in different leisure activities and for requirements and types of facility that are provided.

Table 2.1: MEDIAN AGE OF PEOPLE PARTICIPATING IN DIFFERENT LEISURE ACTIVITIES (1996)

ACTIVITY	Median Age
Lawn bowls	60
Walking	43
Golf	42
Fishing	38
Swimming	36
Keep fit/yoga	36
Cycling	36
Table tennis	36
Horse riding	35
Badminton	34
Tennis	33
Squash	32
Running/jogging	31
Snooker/pool/billiards	29
Weight training/lifting	29
10 pin bowling/skittles	29
Soccer	26

(data from GHS)

Table 2.1 shows the median age in 1996 of people participating in different leisure activities. The activities have been ranked in descending order using this median age, to give an indication of the type of activities that appeal to different age groups. It would seem reasonable to assume that as a greater percentage of the population become older, there will be more demand for those activities which specifically appeal to people of an older age group.

The survey found that the proportion of adults who had taken part in a physical activity in the 4 weeks preceding interview is lower with each successive age group. However, some activities do not follow this trend - for instance walking is fairly static for each age group up to the 60-69 age group. Rates for swimming and keep fit are stable between the ages of 16 and 44. This decrease with age is similar for both men and women, although participation rates for women are lower than those for men (GHS 1996).

In our culture, older people tend to be devalued and excluded from economic or productive activity. Wearing (1995) argues that instead of seeing ageing as preventing physical activities and social involvement, leisure itself should be used to challenge this view and ensure that physical and mental abilities continue to be used in old age. The accomplishments of some over 70s have transformed the notion that 'sports for older people are essentially therapeutic' to 'an image of positive health and autonomy' (p.277). The Sports Council's programme '50 plus - all to play for' is an attempt to target this age group, and there is potential for countryside recreation programmes to be targeted in a similar way.

A further change over recent years which has affected the numbers of older people participating in leisure and tourist activities is the increase in the number of people being offered and taking early retirement [find figures if possible]. This has boosted the 'silver market' - people aged 55 and over, who are actively retired and also have a substantial disposable income. These people represent a potential source of income for both countryside recreation and tourism more generally. This group of people have created a boom in long-stay winter holidays in milder climates, escaping the sometimes harsh winter climate of the UK, and those who are more active have set off on long haul travels around the world. This group of people have different needs and requirements to those who are more traditionally retired, but there is a similar gap in the market in meeting their leisure needs. Leisure Consultants 1998 see this trend to earlier retirement, combined with the move into their 50s of the post-war baby boom generation, as increasing the number of active, relatively affluent, young early retirees as we enter the new millennium. They believe that this group will become ever more important for the leisure market. The sectors most likely to benefit are holidays, both home and overseas, active sport (walking and golf especially) and gardening.

Household Structure

The General Household Survey show that since 1971 there has been a decline in the average household size, which was 2.91 at the start of this period, and in 1996 was 2.43. This is a result of an increase in 1 person households, which represented 17% in 1971 and 27% in 1996. Of this 27%, the percentage of 1 person households occupied by a person aged 60 or over is 59%.

Another significant feature revealed by the General Household Survey is the increase in the number of single parent families. In 1971, 8% of families with children had only one parent living in the same house, but by 1996 this had increased to 21%. This figure has remained fairly stable since 1993. This also has implications for countryside recreation, especially regarding the provision of facilities and issues of social exclusion].

Gender and Leisure

The Social Trends information shows that in 1996, men were twice as likely as women to participate in vigorous physical activity for at least 20 minutes, a minimum of 3 times a week. The activities favoured by the different groups also vary, although walking is the most popular activity for both groups and for all age groups. The second most popular activity for men was cue sports, whereas for women it was keep fit/yoga and swimming. The greatest differences for participation were cue sports (men 20%, women 4%), soccer (men 10%, women 1%), cycling (men 15%, women 8%), swimming (women 15%, men 11%) and keep fit/yoga (women 17%, men 7%).

The survey found that there had been no significant change in participation in sports between 1987 and 1996, although overall participation (when walking was excluded) had decreased slightly. However, the 4 week participation rates for walking had increased from 41% to 45%, as had cycling, from 8% to 11%. Cue sports have decreased from 15% to 11%. There was no change in the figures for swimming and keep fit/yoga.

According to the General Household Survey 1991, when not in paid work, women spend more time on essential activities such as childcare, cleaning, cooking and shopping. There has been little change in the division of labour in the home in the past decade. Social Trends 1993 suggest that women in fulltime work have over 10 hours less leisure time per week than similarly employed men].

Leisure Time

Time is of fundamental significance to the concept of leisure. Martin and Mason (1994) analysed data regarding leisure time in order to determine trends in leisure time. They found that the impact of the changing economic climate (from 1982-7, a time of growth, to 1987-92, recession) on leisure time was such that the number of hours worked and number of people in employment was higher during the growth period and dropped off as the recession took hold, although these changes lagged behind those in the economy. Overall, there was a 3% rise in leisure time for workers over the 10 year period as a whole. They stress that recent trends in work are towards flexibility, with the introduction of part-time, weekend and temporary work. This blurs the conventional structure of the year and lessens the dominance of traditional times for leisure such as weekday evenings, weekends and the summer holiday. They see this as a move away from the conventional life pattern, which is further enabled by increasingly flexible education and retirement patterns (Handy 1984).

A further finding was that leisure time is now substantially more important in the national life than time spent on paid work. For the UK population, leisure accounts for 3% of annual time and 49% of waking hours, whereas for paid work the respective figures are 8% and 18%. Even those who are employed spend more time in leisure than employment. They suggest that policies and politics should be leisure centred rather than work centred to reflect the importance of leisure in today's society.

Research by Moutinho (1988) reported similar findings. It was felt that an individual's travel and leisure behaviour was often influenced as much by the amount of time available to engage in recreational or leisure activities as by disposable income. A long term trend to more leisure time was described, partly created by a rising proportion of retired people, and more disposable income amongst the population as a whole. Harper (1997) also argues people have more leisure time because of increasing technological sophistication that has created timesaving machinery, such as microwave ovens and leaf blowers.

However, other authors take an opposing view. They argue that over the last few decades especially, we are becoming increasingly pressured as a result of social and economic demands. People are overworked and experience time conflicts, and the result will be a decline in leisure activities (e.g. Schor 1991).

Disposable Incomes

The Social Trends publication shows that over the period 1971-97, real household disposable income per head has nearly doubled. This is an average annual growth rate in disposable income of 2.6%, although the rate has slackened off over the period.

Unskilled manual workers and those who are economically inactive are least likely to participate in any sports or physical activity including walking. This applies regardless of gender or age. There was some geographical variation in participation, with adults in the North, West Midlands and Yorkshire and Humberside having the lowest rates. Those in the Scotland, South West, East Anglia or the South East (but not London) were highest. Clark et al 1994 state that the growth in the proportion of people with higher education qualifications, and in intellectually skilled employment means that countryside recreation is growing, since these people are twice as likely to visit the countryside than semi or unskilled workers. A higher percentage (70%) of the population now own a car, and mileage has doubled every 20 years since 1945. Nearly half of all car journeys are made for leisure purposes, and the high level of car ownership (which is expected to continue to increase) means that more people now have access to the countryside than previously. Clark et al 1994 found that the countryside remains a popular destination for visitors - 76% of the population had visited it at least once in 1990. It has become synonymous with peace and tranquillity, and contrasts favourably with the 'stress and pollution' of urban areas.

Various researchers have attempted to examine the relationship between income level and holiday travel/recreation. For example, Hageman (1981) found that family income, family size and education attainment appeared as the most important predictors of household travel with family income showing the strongest relationship to travel expenditure (cited in Moutinho 1988). Lansing and Blood (1964) found that mean travel vacation expenditure rises with family income. However, Mountinho (1988) argues that it is difficult to determine the relative importance of income per se, because this variable is interrelated with other socioeconomic variables.

Leisure Consultants 1998 predict that average real incomes will grow faster than free time, but there will be a strong emphasis on value for money. They also found a relationship between consumer spending on active sport and the general health of the economy. The market moved from 10.8% decline in 1992 to 6.4% growth in 1997. They predict continued growth but at a slower rate through the 5 year period. Sport expenditure is favourably influenced by the increasing proportion of teenagers and also the numbers of 35-44yr olds who are tending to retain an active sport lifestyle. As far as sightseeing is concerned, they predict this spending to also increase (on historic buildings, gardens, museums, art galleries, wildlife attractions, leisure and amusement parks, country parks, steam railways, visitor centres, workplaces), due to the continuing steady growth in leisure day visits across the board for different types of locations. The gradual rise in disposable income is the major reason to expect the growth to continue. They also expect the number of holidays taken abroad to increase, although this decreased from 1995 in 1996 and 1997 because there were tighter controls on the supply of package tours (in 1995 a lot had to be discounted in order to sell all the ones on offer). Discounting was reduced, and this improved profit margins.

Popularity of different activities

The General Household Survey 1996 found that 64% of adults had taken part in some sport or physical activity in the 4 weeks preceding the interview. Walks (of 2 miles or more) contributed substantially to this figure, and when they were discounted the percentage dropped to 46%. Indoor swimming was the next most popular activity (13%), and only 3 other activities were mentioned by more than 10% of the interviewees - keep fit/yoga (including aerobics) (12%), cue sports (11%) and cycling (11%). The sports that were undertaken most frequently (2 or more times a week) were cycling and keep fit/yoga.

The findings when the 12 months before the interview were considered did not show a change to this pattern - walking was the most popular followed by swimming, and keep fit/yoga, cue sports and cycling had roughly the same percentage of participants. Cycling was undertaken with the highest frequency.

The survey found that much higher participation rates were found for other recreational activities than for sports and physical pursuits. In order of popularity the activities listed were watching television, visiting/entertaining friends or relatives, listening to the radio, listening to records/tapes, reading books, gardening, DIY, sewing etc.

Sports participation is dominated by outdoor activities, but indoor sports participation has been growing at a faster rate than outdoor activities, probably because of the rapid increase in provision of indoor facilities over the 1970s and 1980s (Gratton and Taylor 1991). Women's participation in indoor sports has increased faster than men's, especially in aerobics, keep fit and yoga.

Clark et al 1994 describe countryside users as being predominantly white, urban or rural, middle class, well educated, home owners, with fragmentation into different lifestyle groups. Non-users tend to be predominantly from ethnic minorities, inner-city areas, and are more likely to be single women/single mothers, elderly without car, disabled, unemployed or young. Reasons for non-use range from accessibility problems (i.e. lack of car, lack of awareness of the options available or sites to visit) to more complex cultural factors such as that young people perceive the countryside to be boring, overly disciplined and uninviting.

As far as holidays are concerned, Baker and Olsen found that the general population of the UK appear to be making more spontaneous holiday decisions (cited in Giles and Perry 1998). They suggest this may be because people wait for late holiday deals but then decide to stay in the UK, either because they cannot find a suitable deal or because the weather in the UK is reasonable.

2.2 Cultural Changes

Health issues

In recent years, people have become more aware of the link between activity level and health. This area receives substantial coverage in the media and a glance at any newsagents magazine selection will show magazines such as 'Men's Health' and 'Cosmopolitan', which are filled with articles telling readers how to 'get a six pack in a week', '10 steps to a perfect figure', 'get fit, feel healthy' and so on. There is increasing pressure to be slim and fit, mainly in order to attract members of the opposite sex but health benefits are also cited. Doctors recommend a certain level of physical activity as being beneficial to the heart, lungs and circulation, and to prevent health problems in later life. There is a similar preoccupation with stress often due to hectic lifestyles and pressure from various sources, and the general advice from the medical world and popular journalism is that to reduce the stress of modern living people should engage in sporting activity or some form of relaxation such as yoga or meditation.

This preoccupation with health and fitness in British society is reflected in the participation rates quoted in the previous section, which saw 20% of adults attending a keep fit/yoga class sometime during the 12 months before interview (GHS 1996). It is possible that this trend will continue with more people becoming concerned about health related issues and participating in sports to maintain their health. This is especially true of the older population. It is also likely that the numbers suffering from stress in their everyday life will increase and this may encourage more people to engage in physical activity to help them relax.

Risk taking

Vidal 1999 in the Guardian writes that

'risk taking for pleasure - from eating beef to jumping out of aeroplanes is on the increase. Soft adventure and extreme sports are booming, and attracting everyone form the young and fit to people who, until recently, were more likely to get their kicks walking round NT houses at weekends. Grannies are parachuting, secretaries are bungee-jumping for charity, accountants are big cliff climbing, doctors who condemn smoking are happy to hang-glide, and desk-bound civil servants dream of spending time off doing neck deep powder skiing'.

He suggests that a whole branch of the travel industry is now developing around controlled risks. The reasons given for this growth are that western city life is now tame and increasingly controlled. Physical exercise is often restricted to aerobics in the gym and a sedate walk on Sunday. He believes that the holiday is now seen as the one time when people can discard their ordinary lives and do something which brings a sense of immediate achievement. Something that will enable them to reach emotional peaks and troughs they had thought were inaccessible and which is the antithesis of an everyday life that is too often perceived to be dull and routine. He also argues that people are being separated culturally from nature. For example, research suggests that British people are spending less than 10 minutes outdoors a day, and experience the 'great outdoors' through TV, nature programmes and the window of a car, rather than first hand. In this 'second-hand, illusory society where people are invited continually to be voyeurs, a bracing two hour ride down a river can be a powerful stimulant'. He also argues that risk taking may be a backlash against an over-protective western society, which makes it hard for people to 'get adrenaline kicks'. He argues that the reward for such risk taking is increasing personal control over one's life.

Obviously these sorts of concerns would not come to the fore were it not for the fact that we have more money and time and a society which is geared up to meet these concerns. He quotes James as saying that people are feeling unreal and disconnected - high risk sports allow them to feel real by facing death.

Defining the self

Clark et al 1994 point to the importance of contemporary sociology in leisure, especially regarding the way that individuals now constitute a 'sense of self'. Frequently this individuality is defined at least in part by the leisure activities that are undertaken by a person, rather than the in traditional ways, through associations with religion, trade unions or other established social networks. Social identity is no longer seen as something that is a 'given', instead it can be self-consciously defined by choices such as support of environmentalism or feminism or by a choice of life style. Because of this, choices relating to leisure pursuit such as climbing or historical re-enactment or nature conservation may represent something deeper than simply a hobby or pastime - instead they help define the identity of the participants. This may help to explain why there is such heart felt opposition when these activities are threatened. Instead of representing a trivial use of spare time, it is a key element of meaning in people's lives. Urry 1994 also argued that 'identity is formed through consumption and play'. He felt that people's social identities are being defined by consumption and lifestyle choice, rather than through work. Possibly because of a need to be unique or original, people are branching out into a wide range of diverse activities. Clark et al 1994 found evidence of such a trend, away from patterns of 'mass tourism' of the 1980s and towards individual tastes.

2.3 Impacts of Social Change on Tourism and Countryside Recreation

The impact of the social changes outlined above on countryside recreation and tourism will be complex. The key points are that over the next 10 years, leisure will still be a time for rest and entertainment, but also for physical and mental development, and especially for challenges that stimulate and offer a sense of adventure.

Leisure Consultants 1998 suggest that there will be an increase in the number of British adults taking a long holiday in the UK, from 36% in 1992 to 38% in 2002. They also expect an increase in trips for a short holiday, from 27 million in 1992 to 35 million in 2002. Foreign visitors are expected to increase by 6 million, due to wage increases in other countries. Consumer spending whilst on holiday is also expected to rise. They expect that Center Parcs holidays and activity holidays will continue to become more popular, fuelled by increasing participation in sport and interest in fitness and health. However, this demand will be mainly from ABC1 socio-economic groups. These people now tend to go on 2 or 3 holidays each year in the UK, in addition to at least one overseas holiday. This is likely to be the major source of any future increases in demand for activity holidays.

It is likely that the next 10 years will see growing differences in lifestyles and more flexibility in time use due to new working patterns. Leisure Consultants (1998) predict that there will be little decline in total hours of work, but more part time and sub contract jobs, and home working. They see work and material consumption continuing to be priorities for the majority, although there may be more thoughtful consumers and more concern about quality of life issues, workplaces stress and use of time. They also suggest that interests of older age groups will be more dominant, but that economic activity rates for men over 50 will continue to decline.

3.0 ECONOMIC ISSUES

3.1 Current Economic Trends

Employment patterns

Leisure Consultants (1998) report that unemployment fell sharply in 1997, and is expected to continue to fall, levelling off in 2000. Disposable incomes are expected to continue to rise. They expect the UK economy to continue in this favourable situation, with low inflation, steady sustainable growth and falling unemployment. The stability to the economy will mean consumer confidence is maintained throughout the 5 year period forecast. Leisure in the home is expected to show the fastest rate of growth. Sightseeing and active sport are expected to increase at a faster rate than leisure as a whole. However, UK holiday accommodation is expected to grow at a slower rate than leisure as a whole.

Despite falling unemployment, Abdy (1996) argues that the British work the longest hours in Europe, and the Henley Centre (1997) report that the average is 44 hours per week. This is in contrast with the rest of Europe. Abdy puts forward the view that people in full-time jobs feel obliged to work extra hours, just to stay ahead. Part-time workers are no exception, with the average part-time woman worker having 10 hours free time less per week than her male counterpart. The Henley Centre (1997) suggest further reasons for the long working week, including insecurity due to the decline of the welfare state. This has led to fear of redundancy and a corresponding increase in working hours. They provide figures which suggest that leisure time is falling (by 5% in the last 5 years to 60 hours per week), and this has been felt most by women, parents and full time workers. Both sources suggest that this pressure means that time has become very precious to people. This has important implications for leisure. The Henley Centre argue that there is a limit to the amount of home entertainment people will want, and that an increase in home entertainment will not affect the amount of time spent on activities outside the home.

Thomas (1999) found that leisure spending has increased faster than the general rise in discretionary spending and seems unaffected by the recession. He also identifies that the EU Working Time Directive is likely to have a significant impact on the industry. The World Tourism Organisation Leisure Time Study (1998) found that economic trends are having a dramatic effect on leisure time. In Europe the issues centre upon: the dichotomy of increasing affluence for those in work but increasing pressures to have shorter time available for leisure and the need for employed persons to be spending more of their income by supplementing their state pension provisions. Increasing leisure time spent in and around the home is a real challenge to tourism day trips.

Scraton (1994) remarks upon the growing number of women in the labour force, and reports increases of over one million since the mid-1980s (Scraton 1994). Over 50% of all women are now in paid employment (Social Trends 1993). The consequences of this rise in female employment are described by a Henley Centre report (1997), which predicts that declining household size and increasing female employment rates means there are fewer people to share household chores. This again means less time for leisure.

Tourism and the Economy

In 1995, total domestic tourist expenditure was £12.8bn, which was slightly greater than that of overseas visitors (£11.9bn). However, between 1985 and 1994, domestic holiday expenditure declined slightly in real terms and the number of holidays remained virtually static. (CBI 1996). Total spending by visitors to the countryside is estimated by The Countryside Commission (1997) at £9 billion in 1994, with 72% of total spending attributed to day visitors from home, 22% to UK tourists, and 6% to overseas tourists. Of total spending, the percentage that goes on each area is as follows:

Eating/drinking	50%
Travel	17%
Shopping	12%
Attractions/Entertainment	11%
Accommodation	10%

Leisure Consultants (1998) predict that there will be sustained moderate growth in world economy, including the US, continental Europe and Japan. There will be an increasing impact of European conditions on UK economic management and business policy.

Clark et al (1994) describe the decline in manufacturing industry in this country which has led to service industries such as tourism becoming significant contributors to the national and local economies. At the same time, leisure has taken on a more significant role in many people's lives.

Cooper et al (1996) identify two strong trends in the changing pattern of UK domestic tourist behaviour: the growth of the urban focus for leisure trips; and the dominance of the short break leisure markets. Bland (1998) cites several areas of concern identified by operators surveyed, including: increased pressure created by advances in IT; increased customer expectations of standards and services; growth in new leisure opportunities, introduction of Sunday trading; falling public subsidies of facilities; the value of the pound; and the growth of stay at home entertainment. The strong pound is also mentioned by Hanna (1998) as a major constraint upon attractions reaching their full potential. For example, in 1997, disposable incomes rose by 4%, but attraction visits only by 1%. The Henley Centre (1997) argue that increased customer expectations are a result of time pressure amongst working people. The 'grey market' (55-75) is an exception to this, and is therefore very valuable to the leisure market. They also argue that the appeal of domestic destinations for the main holiday will continue decline.

A report by the Joint Hospitality Industry Congress (JHIC) (1996) predicts that the effect of globalisation and competitive pressures will be to increase the importance of the hospitality industry in the UK economy, both in the numbers of people employed and its contribution to GDP. The effect of private health care schemes and pension funds on people's incomes is mentioned, and it is expected that this will reduce the amount of money spent on leisure. They predict that an era dominated by women and women's values is approaching, and the leisure consumer will more frequently be female. It is therefore important to ensure that women feel secure and comfortable in countryside recreation environments. The fragmentation of working structures, changing household composition and increasing mobility are creating a society in which traditional patterns of work and leisure are changing. Greater flexibility in opening hours will therefore be required.

Urry 1994 suggests that western economies are undergoing transformation from a 'Fordist' pattern to a post-Fordist pattern. Patterns of mass-production and mass-consumption are being replaced by more differentiated and flexible economic forms. For example, certain forms of mass tourism are rejected (cheap package holiday, holiday camp), there is a growing diversity of preferences, more attractions will be based on lifestyle research, the consumers' movement will continue to grow, and producers will therefore become more consumer led.

Reduction of VAT on tourism

The CBI (1996) argues that the current rate of VAT on tourism services in the UK could put the industry at some disadvantage. Current EU legislation allows some flexibility for member states in setting rates in a number of tourism related areas. Only the UK and Denmark have failed to introduce reduced rates for tourism services. The CBI believe that although the connection between industry growth and VAT regimes has not been proven, a 'phased reduction in VAT on accommodation would assist with the drive to improve tourism and further strengthen the balance of payments' (p.11). The CBI feel that SMEs in particular could benefit from the reduction in the tax burden. English Heritage claim that the reduction of VAT on tourism services could create almost 90,000 additional jobs and increase foreign exchange earnings by £1.2 billion.

'Just in time' leisure

'Just in time' leisure has grown as a result of the pressures on people's time due to changing work patterns, as mentioned above. JHIC (1996) suggest that impulse spending on leisure will become more prevalent. Promotions and special deals will therefore be more attractive. Mounting time pressures and increasing levels of stress will enhance the need for 'treats' and 'escape' from the pressures of everyday life. It is likely that these factors will combine to mean people will undertake less forward planning for activities, and shorter break holidays will become more popular. The Newidiem (1999) report highlights the fact with increasing pressures on time, the need for holidays and breaks has become almost pathological. The Henley Centre Report on Tourism Futures in Scotland (1996), cites performance related pay as a factor which will lead to later holiday bookings and increased impulse buying. 'Just in time' leisure is therefore expected to increase.

Agriculture

In addition to the impacts on land use resulting from changes in climate, there have been other notable changes within agriculture. Clark et al (1994) describe the moves over the past 10 years towards diversification of farm activities and the reduction in emphasis on increasing food production, as a result of changing agricultural policies. Farmers have been encouraged to take advantage of tourism and leisure opportunities via tourist facilities on farms and also through conversion of farmland for leisure purposes such as golf courses, war games and amusement parks. For example, during the late 1980s early 1990s there was a boom in the provision of golf courses in the UK, and in the popularity of the sport nationally and internationally. Clark et al 1994 suggest that this is partly a result of opportunism by farmers wishing to diversify their businesses. In 1992 the English Golf Union received 1890 planning applications for golf courses. The development of war game sites (an innovative and controversial farm diversification activity) has been a growth area since the late 1980s, with 400 such sites in 1994. However, there is conflict where such sites are in SSSIs, as damage can be done to the woodland in which the sites are located, and because they can be noisy and intrusive. These changes demonstrate that the idea that rural land should be reserved for agriculture has started to loose its popularity.

Clark et al 1994 also describe the range of new financial supports now open to farmers. These include the designation of 10% of agricultural land in England as 'Environmentally Sensitive Area' (ESA), which gives farmers and land owners the chance to obtain income support for managing areas of farmland in a manner designed appropriate for conservation and/or recreational needs. There are also new funds available for farmers under MAFFs Farm and Conservation Grant Scheme and the Countryside Agency's Hedgerow Incentive Schemes. Many National Parks also have farm conservation grant schemes. These projects are providing an important source of income for many medium and small-scale farmers, in already established areas for nature conservation as well as in new areas.

Newidiem undertook a farm and agri-tourism scoping study in early 1999, which was commissioned by the Wales Tourist Board, Welsh Development Agency, Countryside Council for Wales, Welsh Office Agriculture Department and the Farmers' Union of Wales. In this report, the authors recognise that agriculture has been hit by a series of crises, from food scares such as BSE, to international pressure for reduction of public subsidies through the CAP.

3.2 Prospects for the Future/Responses of the Industry

Newidiem (1999) cite Poon's (1993) move in tourism from 'old tourism' to 'new tourism'. On the demand side this means a move towards more frequent trips, short breaks rather than long holidays, active rather than passive pursuits, a search for something novel rather than familiar, a wish to be more independent rather than relying on intermediaries, late bookings, and a search also for something that is different instead of following the crowd. The behaviour of 'new tourists' therefore tends to be very different from that of traditional visitors. Newdiem (1999) express the view that the trends in tourism from 'old tourists' to 'new tourists' represents a promising future for niche market tourism, far away from the mass tourism of package holidays.

Soane (1995) surveyed 300 leading leisure operators, and found that their key concerns were: increased competition within the sector and from other sectors; overall reduction in household disposable incomes; and the increase of in-home entertainment. Clark et al (1994) state that there is an expanding range of new activities, including the development of small scale initiatives in green tourism, niches for a range of sports, both formal and informal, noisy and quiet, new commercial activities e.g. country house hotels, heritage displays, new centres for personal and religious development, massive internationally promoted leisure complexes and theme parks. In addition to this, certain social groups such as the 'new age travellers' are putting their own slant on views of work and leisure, and challenging traditional countryside uses with festivals, raves and celebrations.

3.3 Europe

Single European currency

Bywater (1997) states that 'Economic and Monetary Union (EMU) in Europe....will have far-reaching implications for the travel and tourism industry, and companies in both participating and non-participating states need already to be preparing for these changes' (p.1).

The final stage of EMU will be the introduction of the Single European Currency (the euro), single Central Bank and a single monetary policy throughout most of the EU. It is predicted that tourism will be the most affected industry. The impacts of the move towards EMU are alignment of national regulations and increasing harmonisation in prices as price transparency will reveal anomalies. The Maastricht treaty in 1992 put in place the mechanisms for economic convergence, which will culminate in currencies of all European countries being merely denominations of the euro. It is expected that this will result in a European mean in prices for goods and services. The economic convergence criteria covers inflation rates, interest rates, membership of the Exchange Rate Mechanism (ERM), levels of public sector debt, and the ratio of this debt to GDP.

The most immediate benefit for participating countries and for travel between them is the elimination of transaction costs from foreign exchange dealings. Bywater (1997) states that estimates of these costs vary from 0.4% to 1% of GDP per annum. Trade among participating countries is expected to increase, partly because small business that were previously put off international trading by foreign exchange exposure will enter the import/export business. Competition will increase for all goods and services, and it is likely that there will be more direct dealing with the client as the middle man is no longer required to deal with issues of foreign exchange rates and transactions.

Travellers will benefit by being able to use the single currency in all EU countries, and therefore they will not lose money in commission fees every time they cross a border and need to change currency. Bywater (1997) therefore states that it is likely that incoming tourism from third countries will increase, because travellers will be able to travel with a single currency. A survey by Centre of Economics and Business Research (CEBR) for ABTA notes that for leisure travel a significant impact will be that cross-border 'weekend breaks' in the euro zone may replace some domestic weekend breaks because holiday makers will no longer have to change currency. Table x below shows the CEBR predictions for UK travel.

Table 3.1: IMPACT OF THE SUCCESSFUL EURO ON TRAVEL TO AND FROM THE UK

Travel from UK (%)	1995-2000	2000-2005	2005-2010
Business	23	22	26
Leisure	37	22	24
Total	35	22	25
Travel to UK (%)			
Business	18	23	27
Leisure	17	17	17
Total	17	19	20

NB: These figures assume that EMU starts on 1.1.99 with limited membership, and that the UK joins in 2002/03.
Source: The Euro and ABTA members: Centre for Economics and Business Research

Bywater (1997) also states that there will be a large impact on price competitiveness of various destinations. Since it is expected that prices for goods and services will tend towards a European mean, it is likely that countries which at the moment are relatively cheap for UK holiday makers, such as Italy, Spain, Portugal and Greece will no longer be so cheap. It is therefore expected that these countries will lose out to long haul and North African destinations, especially if the euro is strong. There is also a fear that if public opinion about the euro is negative, people will put off non-essential spending such as that on travel until they are better adjusted to the new scale of values it represents. This could result in an initial drop in travel, followed by a rise to above that of the previous level. In the UK the success of individual providers of countryside recreation and tourism could depend on whether they are proactive as regards the introduction of the single european currency. Taking appropriate measures, such as investing in appropriate IT to enable euro transactions, could be critical to ensuring continued competitive edge.

The Henley Centre (1996) suggest that European integration and greater intra-European travel will result in increased competition. Destination choices will increase and countries such as Slovakia may develop their tourism potential.

European Structural Funds

Objective 1 status is awarded by to Less Favoured Areas (LFAs) of the EU. The Newidiem report recognises that west Wales and the Valleys have been awarded Objective 1 status, which means an estimated £1.3 billion of European funding will be available over the period 2000 to 2006. It also brings with it exemptions regarding State Aids to Industry. This means that a higher level of 'grant intensity' is allowed in these areas, and 'operating aid' is also possible for SMEs in the form of tax exemptions and social security reductions. The whole of Powys will be eligible for Objective 2 funding, which could represent a total of several hundred million pounds. The whole of Wales will be eligible for Objective 3 funding for education and training.

The availability of this funding will mean there will be resources available for the implementation of a comprehensive and viable strategy for developing tourism. Tourism represents one of the main possibilities for economic diversification in Wales.

Agenda 2000

Agenda 2000 was released in July 1997. It is the European Commission's formal response to a request arising from the meeting of the European Council in December 1995 for 'a composite paper on enlargement' and proposals for the future budgetary arrangements for the Union. Other concerns were also voiced in the document, especially those relating to agriculture and the unsatisfactory state of the CAP.

Enlargement plays a far greater role in Agenda 2000 than in any of the large financial packages of the past. The number of member states is now 15. Countries that may potentially be included in the EU if they reach the required political and economic criteria include Hungary, Poland, Estonia, Czech Republic, Slovenia, Romania, Bulgaria, Cyprus, Turkey, Slovakia, Latvia, and Lithuania. Negotiations are underway already with the first five on this list, who are closest to meeting requirements. If such countries meet the inclusion criteria, various changes will be implemented. As far as tourism is concerned, important investment in transport will have to be made to avoid bottlenecks resulting from increased traffic flows, and to ensure the full benefits of integration are reaped. Investment needs in transport infrastructure will be very high, and a large part will be financed from sources other than national budgets. Such transport improvements will make access to these countries easier, and may well result in enhanced prospects for tourism where current potential has not yet been exploited. The development of these new markets will compete with the domestic UK market. However, ease of travel may well mean that the newly included countries represent a source of visitors previously untapped. Appropriate marketing to these countries could boost visitor numbers to the UK. Other changes to the economic and political structure of these countries resulting from the process of inclusion, such as increased political stability and the introduction of the euro, could also lead to a gradual increase in tourism in these areas.

3.4 International tourism

In-coming

Leisure Consultants (1998) predict that foreign tourism to this country will increase. 1996 was a record year for incoming tourists, and a large percentage of these were young people (38% under 34 years). They suggest this is due to London's cultural image, a point that was also mentioned by the Henley Centre (1997), who report that it has experienced a cultural renaissance affecting food, fashion, art and music. It is therefore especially attractive to visitors from Europe and the US.

However, Leisure Consultants (1998) mention although the number of overseas visitors has not been adversely affected by the high pound, there are fears that in the future this may reduce visitor numbers. The Henley Centre (1997) also state the effect that a rise sterling exchange rate can have on in-bound tourism. The strength of overseas economies will also affect the number of visitors to this country, and Leisure Consultants (1998) report that Asian economic problems have already resulted in a drop in world tourism arrivals from that region.

Evamy (1996) states that the UK's share of the World tourism market is dwindling. He argues that schemes such as the National Trust's proposed 'Thousand Threads' will boost visitors to UK heritage sites, by offering high quality design visitor centres where people can explore the history of sites such as Stonehenge. Evamy goes on to suggest that a rethink is needed in the way that people are attracted to historic sites, and that 'many of them are simply poor value for money.....Admission charges have outpaced inflation, while their presentation has remained dull, uninspired and uninformative......these sights seem to concentrate merely on pushing as many people as possible through their turnstiles' (p.11). Instead, what is need is a more sensitive, imaginative approach to customer care, along with development of interactive computer systems that can reveal 'the hidden pleasures of history' (p.11). He believes information technology is the way forward and could take the UKs heritage sites in to the 21st Century as successful and interesting places for people from all backgrounds and countries to visit and enjoy.

Outgoing

The number of UK residents taking holidays overseas rather than domestic holidays is affected by various factors. Perry and Giles (1998) suggest that the cost of overseas holidays dictate to an extent which will be the popular destinations. For example, European prices have been rising rapidly in recent years, which could make long haul or UK holidays more attractive. Again the value of the pound abroad is important, and makes international holidays cheaper. The collapse of some Asian currencies such as Indonesia and Thailand are exceptionally cheap. Robinson (1994) also notes that economic conditions and the strength of the pound strongly influence levels of overseas visitors and the tendency for domestic visitors to travel abroad.

The Henley Centre (1996) believe that the EMU will remove barriers to travel and greater economic stability may lead to a growth in tourism in other parts of Europe. They also recognise that other markets are emerging which offer tourism potential, including the Asian Tiger and Tiger Cub economies, and eventually, China. However, the opening up of these new markets will be coupled with new competition from the same countries. Some of the countries represent 'potentially attractive new tourism destinations and may provide increasing competition' (p.3). Although these comments were made with reference specifically to Scottish tourism, they apply to the whole of the UK.

3.5 Summary of Key Points

- Disposable incomes will rise but this will be offset by increased spending on private health schemes and pension funds
- Leisure time will decrease due to job insecurity, longer working week, women working
- Tourism is likely to become more significant to the UK economy
- More money will be available for investment in tourism as result of EU structural funds for certain areas e.g. Wales, Cornwall
- Agriculture industry likely to see further diversification into tourism
- EMU likely to increase European travel, and will create new markets for the UK but also more competition from potentially new areas
- Stability of the UK economy and overseas economies will affect the amount of international tourism, both in and outward bound
- Agenda 2000 likely to see the inclusion of at least five new countries in the EU in the next 10 years.

Implications for Countryside Recreation

- Time will become crucial and providers of will need to respond to this by making sure that time is minimised at the booking and information stage, and also in travelling.

- The popularity of short breaks is likely to increase due to time pressures and also as a result of EMU. CR packages should be tailored to reflect this.

- The amount of money available for developing tourism in certain areas will increase and the industry should be proactive and take advantage of this.

- Late bookings and special deals will become the norm, and the industry should provide the possibility for this method of business.

- The increase in the dominance of women mean it is more likely that women will be participating in CR activities, and the industry should ensure that women feel safe and comfortable in CR environments.

- People are likely to seek value for money and also good quality services, and the industry needs to ensure that this is what they get in the area of countryside recreation. The business is likely to become 'consumer-led' and in order to retain customers the leisure experience needs to be a positive one. There is too much competition within the sector and from other sectors to risk the effects of providing a poor service.

- The extension of the EU eastwards as a result of Agenda 2000 will create new markets for foreign visitors to the UK, but will also provide competition for domestic tourism and countryside recreation. The industry needs to be proactive to exploit opportunities in Europe with appropriate marketing and promotion of the UK to these newly included countries. Tourism in the UK also needs to be aware that there will be increased competition from these countries and that domestic holidays will need to provide a quality experience and offer more adventure than previously. It is again likely that the short breaks market for UK residents will provide most opportunity.

4.0 ENVIRONMENTAL ISSUES

4.1 Climate Change

Links between weather and tourism

It is estimated that in the UK, approximately $19 billion of the total leisure market results from outdoor activities which are weather related (DoE 1996). In addition to this, various studies have shown that the climate is a primary motivating factor for UK residents taking holidays abroad (e.g. Giles and Perry 1998), with 73% citing 'good weather' as the main reason to holiday outside the UK (Mintel 1991). Links have also been discovered between the weather in the UK over a single year and the number of overseas holidays generated in the following year. For example, Smith (1990) found that that a wet summer in the UK stimulated an increase in the number of people taking Mediterranean holidays the following year. Similarly, Benson (1996) discovered that UK spending abroad and air travel is higher following a cold winter, but after a hot summer, tourist spending in the UK increases and spending abroad is depressed (cited in Giles and Perry 1998).

The weather in the UK is therefore of primary importance in people's holiday destination decisions. Once people are actually on holiday in the UK, the weather continues to play a part in dictating the type of activities that are undertaken. For example when it rains in the Lake District visitors flock to the towns, whereas when the weather is fine a larger percentage of tourists take to the hills. Canadian researchers have taken this idea further by identifying key thresholds for different activities, such as beach swimming and outdoor sports, above which participation rates will increase greatly. This allows 'seasons' to be defined for particular activities.

There are also weather related factors which deter people from undertaking certain particularly weather sensitive outdoor activities for safety reasons, for example adverse weather can make paragliding, mountaineering and skiing particularly dangerous.

The potential effects of climate change are therefore expected to have an impact on various aspects of leisure in the UK, ranging from the destination chosen for a holiday to the daily activities undertaken whilst on holiday, or indeed determining how people spend their non-holiday leisure time.

Predictions of climate change

Predictions of the effects of global warming vary depending on the output from simulation models, which creates dissension amongst scientists. However, it is widely agreed that the general changes that will take place, regardless of near future controls on emissions, will be a rise in sea level, warmer temperatures and a higher incidence of extreme events such as droughts, floods and hurricanes (Giles and Perry

1998). More specifically, the following changes may be expected in the UK (from DoE 1996, Hulme and Jenkins 1998):

Temperatures:
To rise approximately 0.2oC per decade, with an increase in frequency of extremely warm summers and years. Recently the DETR (1998) report published figures of an increase of 0.9oC by 2020, and between 1.1-2.4 oC by 2050.

Rainfall:
To increase by around 5% by the 2020s and 10% by the 2050s, mainly in terms of intensity rather than by an increase in the number of days when rain falls.

Wind speeds:
To increase in summer and winter, and gale frequency to increase by 30% (2050s).

Sea level:
To rise by 5cm per decade on average - more in the south of the UK because of sinking land, less in the north because of rising land.

Extreme events:
An increase in intense precipitation events and extreme windspeeds, especially over the northern UK. Gale frequencies to increase by up to 30% by the 2050s.

Confidence is high regarding rising temperatures and sea levels. There is less confidence in the geographical patterns of temperature change (especially regionally), and the changes in rainfall, winds and extreme events.

It is expected that there will be variations over the country as a whole. The currently dry Southeast should become 8% drier and more prone to drought, whilst the wet north west should become 7% wetter and more prone to flooding (DETR 1998). It also suggests that:

'the balmy climate of south Devon today would be experienced in Manchester by 2020 and in Durham by 2050. Durham temperatures would shift to the far north of Scotland. Southwest England, meanwhile, could experience temperatures more like those of southern France, with days above 25 oC roughly doubled. A summer heat wave like that of 1995 (a once in a hundred year event today) could appear one year in every three by the 2050s in southern England' (DETR 1998 p.1).

Although predictions are subject to uncertainty and a large degree of speculation is involved, it is possible to anticipate some of the effects of these changes on tourism generally in the UK, and more specifically upon countryside recreation. Some activities will benefit. Some will not.

Effects on Tourism

At the current time, all authors surveyed agree that the changes outlined above should be beneficial for leisure and tourism in the UK as a result of warmer temperatures and a consequent extension to the holiday season. It is thought that 'there will be new opportunities for the industry if a trend towards warmer, drier and sunnier summers stimulates an overall increase in tourism in the UK' (DoE 1996).

Climate change in the UK will be set against global climate changes, which will affect the competitiveness of the UK in the global tourism market. 'It would only take an average temperature increase of 1∞C in the UK to make the very hot year of 1976 appear normal, hence removing the need for UK tourists to travel to the Mediterranean in search of sun' (Attard et al 1996 cited in Giles and Perry 1998).

Along eastern and southern coasts it is expected that the higher air and sea temperatures will encourage more bathing, and could lead to the restoration of the traditional family beach holiday. Mediterranean beach holidays may decline in popularity, as temperatures become uncomfortable during the summer months, especially if the UK remains competitive in terms of accommodation pricing and the costs of other services. However, the rising sea levels may mean visitors find beaches engulfed or substantially eroded.

At the same time as UK destinations are becoming more popular. Overseas destinations may become less so, as a result of climate change, for example as a result of rises in extreme events such as heat waves and hurricanes. Such locations may become too hot for summer breaks, but more popular in 'shoulder months'.

Increased levels of tourism in the UK are not predicted to be confined just to the summer months. It is possible that there will be more spontaneous weekend and short term holiday breaks, especially in spring and autumn. Milder winter conditions may mean that older residents are less attracted to Mediterranean areas with their more clement winter weather.

One negative aspect however is the impact of a 20-30cm increase in sea level, and the possible increases in storm intensity and frequency which may threaten beach resorts through increased risk of flooding and rates of beach and coast erosion. Facilities such as marinas and piers will also be affected, as well as other recreational areas near the coast, such as sand dunes, golf courses, promenades, sea-front hotels, shingle banks, marshlands and soft earth cliffs. The effects for coastal areas will depend upon whether the approach taken includes improving coastal defences.

Effects on Countryside Recreation

The DoE predict that in response to UK climate changes, strenuous outdoor pursuits, especially those that are water based, will become more popular. There will opportunities to further exploit the recreation potential of shorelines of lakes and reservoirs. However, the DoE warn that there will be a need for better management of visitor pressures at peak periods, and that certain recreation environments may be at risk from climate change, for example moor and heath may have heightened fire risk (meaning possible closure of areas during peak season), and beach erosion may be more vigorous, removing beach material and necessitating the provision of coastal defences. Such erosion may also threaten recreation areas near the coast, as mentioned in the previous section.

There has been an increase in popularity of activity breaks, and it is likely that this will continue to be the case. In a warmer UK there will be greater potential for such holidays, including walking, climbing, cycling, golf, riding, game fishing, sailing, canoeing or conservation work. Hot air ballooning and other specialised weather dependent sports such as paragliding will also increase (Thornes 1983). Heat stress in the cities in summer along with poor air quality is likely to drive people to the countryside and the coast at weekends.

In the North, the increases in rainfall, wind speed and cloud cover will offset the advantages of warmer temperatures for the outdoor recreation industry. Changes are likely to be less beneficial for the leisure industry. There is also concern that the rising temperatures will adversely affect the Scottish skiing industry, especially for the lower altitude resorts. Analysis of winter meteorological data from the past 30-40 years for Scotland in a study by Harrison et al (1999) found that there are indications that winters are becoming milder and summers drier. As a result, ski resorts may suffer from inadequate snow cover and increased risk of avalanches due to warmer winter conditions. There is therefore some potential for providing alternative facilities for skiers, which will allow temporary diversification of activity when the weather is not suitable for skiing. The study used GIS to obtain a detailed picture of changes in local climate, rather than the usual broad brush analysis of Scotland as a whole. Given the potential importance of the impact of climate on the whole of the UK, it may be worth extending this method to England and Wales, despite the uncertainty in future predictions.

Agriculture

Various climatic factors influence the annual output from agricultural concerns, and this sector will therefore be sensitive to changes in climatic regimes. Any change in location of agricultural production will have knock on effects in terms of land available for countryside recreation. The expectation is that the higher temperatures, increased evapotranspiration, and elevated atmospheric CO2 may shift arable and other field crops north and west. It is expected therefore that land use patterns will alter to adjust to the change in growing conditions. Although it is not mentioned in the DoE 1996 report it is possible that these changes in climate will make conditions at higher altitudes more favourable for agriculture. Such changes in altitude may affect the land available for countryside recreation. Land use will be allocated according to yield potential and world prices (Parry), and it may well be that some activities will cease to be economically viable, and new ones will become potentially profitable. Other changes in climatic regime such as the clustering of extreme events (e.g. 3 consecutive summers experiencing drought) are more likely (DETR 1998) and this makes the risk of fire greater, as well as causing potential problems of water availability for crops.

Forestry

The DoE 1996 report states that forestry will be more affected by changes in policy, agricultural change and conservation than by climate change. The suggestion is that climate changes will encourage forest expansion as areas previously unsuitable for forestry increase their potential for productivity. However, in the south the lower rainfall and higher evapotranspiration will reduce productivity and threaten marginal sites. There is also the risk of more frequent forest fires, which will affect access for recreation and may affect people's perceptions of forests as recreation areas.

There are incentive schemes such as the Woodlands Grant Scheme which includes grants for community forests, and the Farm Woodland Premium Scheme, which encourage farmers and other landowners to make 'public enjoyment provisions' in areas of woodland (Clark et al 1994). This may well lead to more woodland sites being available for countryside recreation.

However, marginal woodlands in the south of the UK are likely to be threatened by water shortages, and this will impact on the use of forests for recreation and amenity. This is especially true for forest areas near to urban areas - alternative species should be considered now which require less water.

5.0 TECHNOLOGICAL ISSUES

As Harper (1997) describes it; our increasing technological sophistication has multiplied leisure opportunities 'practically beyond belief' merely through the new products that it creates, e.g. mountain bikes, roller blades, and virtual reality games. Urry (1994) suggests that there is at the current time a 'curious mixing of science fiction, environmentalism, high technology, the attraction of the vernacular, the confusion of the real and the stimulational, the possibilities of time and space travel - generally the intermingling of travel, leisure and cultural change' (p.233). Certainly it is true that developments in IT and technology in general have impacted greatly on the tourism and leisure industries. Buhalis et al 1996 suggest that it has even led to a paradigm shift in the tourism industry. Travel and tourism have already benefited greatly from IT, e.g. for airline reservations, hotel bookings, etc. In this section the main developments in technology affecting or likely to affect tourism and leisure are considered.

5.1 IT Advances and Tourism Operation

Operating Systems

The travel and tourism industries have benefited greatly from developments in IT, which have allowed integration of services and revolutionarised booking and reservation systems (Cheong 1995). Bentley (19..) describes the consolidating effect technology advances have had on tourism enterprises. Many articles have been written about the effect of IT on tourism operators (e.g. Connell and Reynolds 1999, Buhalis 1998). Apart from stating the positive effects that these advances have had on operations, they also warn of the dangers of not keeping up with progress and demands from consumers. In the main, these comments are directed at the use of the internet, which will be considered below.

Internet and Marketing

Bentley (199.) points out that advances in IT have allowed databases of information about people to be compiled. These can be used for effective marketing, for example by advertising to appropriate target groups, or for designing a product that is tailored to a particular target group. He also draws attention to the fact that the increasing use of web pages to advertise holidays and the fact that tickets can now be booked via the internet mean that there is serious competition for traditional travel agencies. In order to maintain business, agencies increasingly need to 'add value' to the service they provide. This is true also of people 'selling' countryside recreation holidays – it is essential that they make use of the internet, and also that tourist offices ensure they 'add value' to visitors.

Hanna and Miller (1997) found that there is demand for tourism information on the internet, and that this demand is likely to increase as use of the internet becomes more widespread. In most demand is travel information and illustrations of the main attractions. Cano and Prentice (1998) argue that although tourism businesses are using the www to meet the demands of 'visitors', they are missing the opportunity of capturing new business. They suggest that traditionally, visitors become endeared to a place through real visits. However, the www could provide an alternative to real visiting, and electronic 'visiting' could initiate the endearment process. WWW homepages therefore have 'the potential to become powerful advertising and marketing tools'

In 1997, the www became an integral part of the promotion plan for Scotland. The Scottish Tourist Board found that two-thirds of the visitors to the www pages surveyed in 1997 thought that they were more likely to visit Scotland having visited the www pages than previously.

Virtual Reality

Although VR has not yet achieved its full potential due to limitations in technology, further advances seem likely. VR is 'a computer-mediated, multisensory experience' which replaces normal experience with 'synthesised 3D material such as graphics and sound'. The user wears a VR headset, which enables him to be emersed in the data, in the same dimension. There are various sensory stimuations e.g. sight, sound, touch, plus feedback, so the user feels like they are actually there, in the real environment, rather than in one that is computer generated.

Urry (1994) suggests that it is likely that virtual reality technology will be developed to bring tourist sites into people's homes, not just through television and video, but through a 'three dimensional reality hardly less artificial than Disneyland'. Clearly this will have a large effect on tourism, and on the way in which people spend their leisure time.

Cheong (1995) describes the impacts of virtual reality on tourism and leisure as being three-fold. These three impacts shall now be discussed.

1) <u>VR as a marketing tool to increase a destinations appeal:</u> In this context VR would be used by travel agents to enable a potential visitor to 'visit' the holiday destination before actually choosing a holiday. Information about the destination would be stored in the software of the system, and by using VR, could provide a preview for the potential tourist. Although the person may choose a different holiday on that occasion, memories of the other places experienced may linger from the VR visit, and this may prompt future visits. In this way VR has the potential to prevent people from having unsatisfactory holiday experiences.

2) <u>VR as a policy and planning tool:</u> The main use for VR here would be in developing a new tourist destination. If information about a site was fed into the VR system, it would enable planners to carry out building work on the VR destination and examine the impacts on the environment before actually carrying

out the work in the real location. It would be useful at the design stage, and would lead to more successful development of destinations. It could therefore reduce the negative impacts of tourism.

3) VR as a threat to the travel industry: There is the risk that if the VR experience becomes very realistic, people will no longer feel the need to travel to the actual destination. VR travel could replace real travel. VR travel has several advantages over real travel. It can create the perfect conditions for the tourist: perfect weather, no queues or delays, no accidents or risks of illness. It will be cheaper and more convenient, saving time that is often used up by booking and travelling to the destination. If people no longer travel, this will have positive environmental effects as travel pollution is reduced. It has the potential of extra excitement as it would be possible to travel into fantasy worlds, or back in time. The travel experience may be brought to those normally unable to participate, such as the disabled, ill or infirm. Negative social effects such as visitor resentment will be removed. Business travel could also be involved by linking VR systems for VR conferencing.

However, there are several authors who do not believe that VR travel could replace the real thing. Musil and Pigel (19..) argue that VR will not be able to replicate the feeling of being in an environment that is real, or will it successfully imitate social and cultural interaction, especially those that are spontaneous. McClure (19..) also uses the argument that VR will be unable to provide the complexity, randomness and uncertainty of the real world. He also expresses concern about the fate of economies that currently depend on revenue from tourism.

Williams and Hobson (1995) also recognise the importance of VR as a sales and promotion tool, although they suggest that it will be an expensive service for travel agents to provide. They also put forward the point that VR trips could compete with what the travel agents have to offer, especially when advances in VR mean that it no longer complements tourism but becomes a competitor instead. Another use of VR in tourism which they describe is the development of virtual theme parks. These are smaller and cheaper to build than normal theme parks, and already exist in Japan and America. At the moment they contain VR rides, cinemas and 3D theatres. The further development of these parks will compete against countryside recreation for people's leisure time.

Despite these potential challenges to traditional travel and leisure activities, Williams and Hobson (1995) do point out that the VR revolution is yet to happen, and (in 1995) they felt it was at least a decade away. However, it is essential that providers and planners of countryside recreation are aware of these potential new activities which could compete for the time of their customers.

Space tourism

The development of space tourism as a viable option for holiday makers is still many years away. However, Urry (1994) mentions a proposal from a Japanese company to develop a 64 bedroom space hotel to be opened in 2010, to which visitors will be transported by space shuttle. The prediction is that within 50-100 years space will be a major destination for mass-market tourists. Clearly this is beyond the 10 year scope of this research, but is worth consideration as a further competitor to more traditional holiday destinations.

New physical pursuits

New technology has allowed the development of new physical pursuits. For example, mountain biking is a tremendously popular 'new' activity for countryside recreation, and one which has caused controversy in rural areas. Clark et al 1994 describe the tension between mountain bikers and walkers/climbers, the latter group feeling that the use of bikes on mountainsides is not appropriate or natural. The rapid growth in mountain biking has meant that facilities for bikers have been outgrown. In 1993, competitive mountain biking was the fastest growing UK sport. Improvements in technology have also made activities cheaper and therefore more accessible to larger numbers of people. There is also the potential for technology to make existing activities less intrusive or environmentally damaging, for example quieter engines on motor boats, etc.

5.2 The Future

As far as countryside recreation is concerned it is essential that providers of countryside recreation holidays and activities are aware of the potential competition from the internet regarding the provision of these services. In order to remain economically viable, it is essential that they exploit the opportunities presented by developing useful and informative pages on the internet, and that tourist information centres consider ways in which they can 'add value' to a service to prevent it from being replaced by the internet during the next 10 years.

Although the development of virtual reality travel and games may seem a long way off, advances in technology are likely to result in some real changes over the next 10 years. VR will increasingly compete for people's leisure time, and providers of countryside recreation will need to work even harder to attract people away from their homes into the countryside. Whether VR will ultimately replace travel seems at the moment to depend on the person – it is likely that for some people will be content with the VR experience, whereas others will be dissatisfied with it and continue to seek experiences in the 'real' world. The result of this is that the development of VR may mean people have less time for countryside recreation as they have the option of virtual travel from the comfort of their own home.

The impact of the development of new technologies on the leisure industry, such as that of mountain biking, cannot be easily predicted. However, it seems fairly reasonable to assume that over the next ten years there will be new physical activities available which will require a countryside setting, such as has been seen in recent years for mountain biking, paint balling, paragliding, and so on. Providers of countryside recreation will need to keep abreast of developments so that they can manage and plan for such eventualities, and promote the use of the countryside to these potential users.

6.0 GOVERNMENT AND GOVERNANCE

This section explores the recent trends and possible future of government and governance in the UK. The term 'governance' includes the traditional activities of state institutions, and also includes private agencies who are involved in the formation of public policy. Multi-national corporations which undertake diplomatic activity in their relationship with government are therefore part of 'governance'. Pressure groups and NGOs are also included, because they too affect public policy formation. Other influences on national government are international bodies such as the UN, World Bank, IMF, WTO, and trade organisations such as the EU, NAFTA, APEC and MERCOSUR. This combination of bodies forms a 'complex configuration of overlapping levels and features of public and private powers; they form a 'governance system'' (Thompson 1999:142).

6.1 Political Ideology

When the new Labour Party was elected to government in May 1997, it claimed newness as a political party and as a form of governing. Under Blair, Labour has been remodelled and redefined. Old ideas and policies have been discarded and new ones embraced. Critics such as Rustin (1999) have claimed that the dominating principle of its politics is 'realism', and that the party has been casting off as much of Labour's political and institutional inheritance as possible. This includes its constitution, the role of its conference, trade union influence, the idea of politics of class, and the idea of a principled democratic counter-balance to capitalism. Rustin argues that New Labour are sticking with traditional aims of the moderate right, such as keeping taxation down at all costs and giving priority to low inflation and low government deficits. Crick (1999) states that New Labour have 'style, no substance, the medium is the message'. There has been an image change in the party. The new ideology is presented to the public by phrases such as 'new challenges; new ideas', 'the future not the past', 'the age of achievement, at home and abroad'. So similar are their ideals to those of the Conservatives that Hoggart reads their message to voters as 'we are the party for careful car owners who vote Conservative but can't stand the Tories' (1996:14). Driver and Martell (1998) describe the Party's economic and social policies as more neo-liberal and conservative that ever before. Their central argument is that New Labour represents an exercise in post-Thatcherite politics. The Party is now more committed to free trade, flexible labour markets, sound money and the spirit of entrepreneurial capitalism, not to mention greater individual self-help and private initiative in welfare. However, there is another side to New Labour. It is repelled by the individualistic message of Thatcherism and by the loss of touch between politicians and the people, especially the excluded sections of the population. As Driver and Martell (1998) put it, New Labour has 'attempted to strike a balance between economic success and 'social inclusion', the market and the community. New Labour offered a greater popular sensitivity in politics, and a concern 'for the many and not just the few' (p3). A month after Labour's victory, Blair made a speech in Sweden ,saying: 'Our task today is not to fight old battles but to show that there is a third way, a way of marrying together an open, competitive and successful economy with a just, decent and humane society'. These changes in Party ideology have led to changes in government policy. Those relating to tourism or countryside recreation will now be considered below.

The 1999 Budget

Deloitte & Touche (1999) identify a number of implications of the March 1999 Budget on the leisure industry. They are:

- Further reduction of public spending increasing the pressures on all public sector bodies to seek 'best value' solutions and focus upon their core service delivery requirements
- Withdrawal of mortgage relief thus squeezing household incomes
- Help for green transport and further fiscal penalties for the use of the private car
- Encouragement for the private use of computers.

The 1999 Budget also saw the introduction of several 'green' initiatives. These are mainly presented in the form of taxation measures which are intended to create an economic strategy which will achieve the UK's targets for reducing greenhouse gas emissions. New Labour seems to have taken onboard the idea of 'polluter pays'. Friends of the Earth commented on the budget that 'it seems the purpose of ecological taxation has been accepted and there has been a change in philosophy...' (cited in Cowe 1999:15). The specific taxes are:

- Industrial energy tax to be introduced in April 2001. This will be payable by industry in the form of a surcharge on electricity of 0.6p/kWh and on gas and coal of 0.2p/kWh.
- Landfill tax: to be increased by £3/tonne from April 1999 and to increase by £1/tonne each year until 2004.
- Reforms of vehicle duties and the company car tax issue where larger tax breaks are given the further the car is driven.
- Mr Brown warned that taxes could be introduced for the quarrying industry and for those using pesticides.

6.2 Devolution/Constitutional Change

'The creation of devolved government institutions in Scotland, Wales and Northern Ireland has been one of the major achievements of the Labour government's first year in office (1997-8). The Labour government have also taken steps to implement its more conservative proposals for the English regions' (Mawson 1999:73). Regional

Development Agencies have been set up in England, and proposes to create a Mayor and assembly for London. Ministers are considering proposals to underpin English devolution by giving the 8 newly-created regions a guaranteed status in Parliament. John Prescott want to take this decentralisation of government further, with guaranteed places for regional members in a new second chamber, to eventually replace the House of Lords (Hetherington 1999). He is pushing for a co-ordinated second wave of development and power sharing for the English regions. The RDAs have five functions: economic development and regeneration; promotion of business efficiency, investment and competitiveness; promotion of employment; to enhance development of employment skills in the region; and contribute to sustainable development. They are charged with developing a regional strategy alongside a range of regional actors and interests, with regional development to be achieved through consultation and public-private partnerships. However, when contrasted with the powers given to the types of regional government to be established in the UK, the RDAs are fairly limited in scope and capacity for independent activity.

Newidiem (1999) report details likely impacts of the Welsh Assembly on tourism in Wales. The Assembly will decide the budget for the Wales Tourist Board, approve its corporate strategy and monitor its performance. It will also determine the tourism component of the National Development Plan and the Single Programme Documents for the European Structural Funds. It could merge the WDA with the WTB, or divest the WTB of its development function, as in Scotland. It could create a Tourism Partnership between the WTB, LAs, industry and Regional Tourism Companies. It could develop a training strategy for the sector. It could ask Westminster for tax variances, e.g. tourism subject to half the VAT rate. It will clearly have some considerable power over the development of tourism in Wales.

The future of tourism in England is described in *Tomorrow's Tourism* (1999), which outlines the government's tourism strategy. It is intended that a new strategic national body for England is set up to provide leadership to the English tourism industry. More central government support is also promised for the regions to give each part of the country better resources to develop their own identity and strengths. It is intended that the Regional Tourist Boards work alongside the RDAs and regional Cultural Consortia to deliver the regional tourism strategy.

The Henley Centre Report (1996) states that devolution could have a 'particular significance' (p6) for tourism. With reference to Scotland, they argue that the Scottish Assembly has the potential to give tourism the status is deserves. Devolution could also be significant in ensuring continuation of the Scottish identity; 'name recognition' in political circles could have a knock on effect in promoting distinctive hospitality. It is possible that the English RDAs could play a similar role in promoting tourism. In *Tomorrow's Tourism,* the government outlines the role for the RDA to play regarding tourism. Their economic strategies should include tourism, and they should work closely with the Regional Tourist Boards. They must also ensure that tourism development is sustainable.

6.3 Local distinctiveness

Clifford and King (1993) describe local distinctiveness as being essentially about places and our relationship with them. It is about both the commonplace and the rare, the everyday and the endangered, the ordinary and the spectacular. They describe the cultural landscape as being held together by 'stonewalls and subsidies, ragas and Northumbrian pipes, Wensleydale sheep and halal butchers, whiskies of Islay and Fenland skies, bungalows and synagogues, pubs and Padstow Obby 'Oss, round barrows and rapping, high streets and Ham stone, laver bread and Devon lanes, door details and dialect' (p7). They argue that homogenising forces have been at work threatening this diversity, for example by planting the same trees everywhere, building houses in the same style and so on. Local distinctiveness flies in the face of this lack of individuality, appreciating and celebrating the uniqueness of places. The concept has become popular especially over recent years. It can be tied in with the sustainability agenda and LA21, and can also be used as an economic tool by the promotion of particular foods or crafts from certain areas.

Local Distinctiveness as an Economic Tool was the subject of a CRN workshop in 1999. Speakers presented ways in which local distinctiveness could be exploited to attract visitors to an area, and to ensure that products that are produced in a locality, such as Devonshire beef, continue to maintain their popularity. It is obviously a powerful marketing tool for the attraction of visitors to particular areas, so much so that a Henley Centre report (1996) argues that developing local distinctiveness is essential for success of tourism in Scotland. It seems likely that this comment could be extended to the whole of the UK. Promoting the unique features of a place will attract visitors who wish to soak up the atmosphere and special character of a town, village or area of countryside.

6.4 Sustainability

The sustainability agenda has become central to many policy discourses since the Earth Summit in 1992. Clark et al 1994 report that sustainable development is to be applied to all sectors of industry including tourism and leisure. Future patterns of development will therefore be required to have environmental considerations high on the agenda. The Government published a consultation paper on sustainable tourism in April 1998: ('*Tourism - Towards Sustainability*). *Tomorrow's Tourism* was published in 1999, and outlines the governments vision for the future of tourism in England. They identify 15 action points which are at the core of the strategy. The first is 'a blueprint for the sustainable development of tourism to safeguard our countryside, heritage and culture for future generations' (p.4). They also state that economic, social and environmental sustainability is the common core of the objectives for the proposed new strategic body for tourism in England. Six areas where action needs to be concentrated have been identified:

1) establish an effective policy framework

2) maximise tourism's potential to benefit local communities

3) manage visitor flows

4) address the transport issues associated with tourism

5) address the planning issues associated with tourism

6) build partnerships between public, private and voluntary sectors (p50).

Various initiatives are proposed to ensure that sustainability is considered with respect to tourism development. Sustainability is a strong element of the future for tourism and for countryside recreation in England. The same is true in Scotland, where a Henley Centre report (1996) recognised that sustainability formed a major part of the vision for tourism in Scotland. It was felt that Scotland's environment would become more and more of a selling point as concern for the environment grows. It was also recognised that there may be a market for 'green tourism' as underlying public interest grows. However, it was also felt to be important to see tourism 'developed as an industry which sustained local communities and sustained the natural environment' (p7).

6.5 Funding

Funding for tourism projects in the future is likely to come from a wider variety of sources. Sayce (1999) states that for the private sector finding funding is no longer problematic, 'as long as funds are generally available to the commercial property sector' (p.22). However, the situation is different for public sector funding. Leisure property provision has relied on discretionary funding and the 'determination of the elected body to provide facilities under a general notion of social good.' (p.22). Money available for discretionary funding is hard to find, and for this reason Sayce suggests that grant funding may provide the key to leisure provision. The lottery funds are perhaps the most important of these sources. They are not the only source; for example money from English Partnership and the EU is being teamed up with lottery funds to develop the £50m Baltic Centre for Contemporary Visual Arts in Gateshead. The number of applications for funding from the lottery far outweigh the money available. Sayce describes the situation as 'a severe funding gap which the public purse and grant agencies are never likely to be able to fill' (p.22). With declining lottery resources, there may be future difficulties in the funding of leisure projects. Stevens (1998) identifies the impact of Lottery funded projects and the scale of their capital investment as a major concern for the attractions sector, which remains under-capitalised.

The Henley Centre report (1996) states that the provision of adequate public sector funding for tourism will continue to be important. Continued private sector funding will also be crucial, raising issues of access to new sources of funding. *Tomorrow's Tourism* outlines the funding role for the RDAs, which will be expected to administer regional regeneration programmes. The money available for this will total over £3 billion over the next 3 years. £160 million of additional money will also be available from the Single Regeneration Budget (dedicated to upgrading urban and rural environment in less prosperous areas of the UK) for areas where there is severe deprivation.

6.6 Changing Role of Government

There has been a significant shift in the philosophy and nature of service delivery in recent years. One of the most fundamental changes has been the way in which people in local communities are served by their local authority. Recently, emphasis on the term 'community' has been subsumed within a broader terminology focusing on 'consumers' and 'citizens'. Hill (1994) suggests that the interface between citizens and local government has become increasingly complex. Rather than simply interacting with their elected local government, there is a complex framework of public, semi-public and private organisations which must be confronted first. Local government justify this by arguing it makes them democratic and accountable, with accessible and participatory decision making. In addition, the dividing line between central and local government is now less clear than it once was. As a result of the previous Conservative government, central government now has an increasing influence in setting the agenda for local authorities. The Conservative government of the 1980s and 1990s fundamentally changed the context of local authorities, resulting in 'systematic reductions in the powers and functions of local authorities (Stewart 1994:142). This makes local democracy more difficult, and also makes it considerably harder to implement changes outlined in LA21, which see increased participation on the part of citizens in determining policy for their local area.

A further manifestation of change in the role of local authorities is the process whereby the function of local government, as an enabler as well as provider of services, is now 'overlaid with market-oriented services that have cast citizens in the role of *consumers*' (Morpeth et al 1999:16). The privatisation of services has been one of the most fundamental changes in the last decade to the political arena of local government in the UK. This is described by Patterson and Theobald (1996) as a process of 'hollowing out' of local government; a consequence of allowing market forces ascendancy within service delivery, particularly through Compulsory Competitive Tendering (recently superseded by the Best Value policy of the new Labour government). This approach to service delivery has resulted in more centralisation of decision making within local authorities, as the work of peripheral departments has the potential to be privatised or performed in partnership with the authority. Power and policy-making has therefore become more centralised.

Stewart (1994) expects that the 'hollowing out' of local authorities will change over the next few years to become 'hollowing out' of the state, with greater devolution of power from the centre to the regions and localities. The initial policy surge from the new Labour government in the UK suggests that this is a key policy objective.

These changes in the role and power of local government raise the question of whether the system is able to accommodate comprehensive community consultation and involvement. The reorganisation of local government throughout the 1990s which has increased the size of many local districts also makes community involvement more difficult, as do the financial constraints local authorities have been acting under.

The White Papers *In Touch with the People and Local Leadership, Local Choice* promote community governance as a method of achieving modernisation of local government. A survey by Byron Davies reported in Local Government News (1999) collated the views of Chief Executives of Local Authorities in the North on the subject of Community Governance. They found that the concept of community involvement was widely supported, but that community governance means different things to different people. Consultation and communication were felt to be most important, with public participation as a key aim.

Local Agenda 21 was a major document drawn up at the Earth Summit in 1992. Local authorities are tasked with putting it into action and thereby achieving sustainable development at the local level. It forms a central part of the work of local authorities. 'LA21 challenges local authorities to adopt policy goals encompassing not only sustainable development but also to incorporate participative, collaborative processes, which involve local communities in defining their own sustainable futures' (Jackson and Morpeth 1999, p.1). Jackson and Morpeth argue that while sustainable development in tourism practice is emerging, it remains largely outside the LA21 process. The relevance and significance of LA21 to tourism has been slow to be recognised. LA21 requires local government to make community involvement central in the implementation of strategic sustainable development initiatives. Citizens should be consulted on local priorities, concerns and actions regarding environment, development and other (e.g. social) issues.

6.7 Europe and the UK

More and more frequently UK policy developments are driven by EC directives. The European Commission published a Green Paper on Tourism in 1995, which argues that 'it is vital for the future of the European tourist industry for it to operate according to the principles of sustainable development, because of the significant potential environmental, economic, cultural, political, social and community costs and benefits accruing from tourism' (Morpeth et al 1999 p.3). It also recognises a need for tourism to respect rather than threaten natural and human resources available now and for future generations. The hope is that LA21 will help catalyse the implementation of the principles of sustainable development within tourism development planning and management. If anything, the EC takes a stronger line regarding policy for sustainable development than national governments take themselves. It is likely that UK policy will be driven more and more by Europe, with its strong lines on issues such as the environment. Sustainability is likely to feature even more in UK tourism plans for this reason.

The New Labour policy regarding Europe and the euro in particular is that it will 'wait and see'. Various authors (e.g. White 1999, Young 1999) put forward the opinion that the New Labour government is in favour of joining the single currency bandwagon, but that it will lose votes if it does so. It therefore needs to 'counter 20 years of anti-European hostility"; a result of Tory propaganda which has the euro as 'an alien coin, imposed by enemy people' (Young 1999:22). Young reports that official scepticism surrounds the euro regarding issues such as whether the European Central Bank is competent enough to administer it. New Labour have made 5 preconditions that must be met before sterlings entry can be contemplated. White (1999) interprets the situation as being one in which Blair will fight for entry but only when ready, which may be in several years time. It may only be when the dangers of not joining, such as 'unstable exchange rates, lost foreign investment, deteriorating unemployment, inexorable national disadvantage' are active that Britain will be driven gratefully towards the 'promised Euroland' (Young 1999:22).

6.8 Globalisation

Globalisation has been argued by Walter et al (1999) to be rather complex, varying in intensity between different countries, issue areas and time periods. The term itself refers to the process whereby more and more societal interactions are taking place within a territory larger than the state. It is expected that the governance and regulation of these transboundary interactions will become increasingly difficult. The European Commission (1997) provided the following definition of globalisation:

'Globalisation can be defined as the process by which markets and production in different countries are becoming increasingly interdependent due to the dynamics of trade in goods and services and flows of capital and technology. It is not a new phenomenon but the continuation of developments that have been in train for some time' (1997:45).

Thompson (1999) suggests that the globalisation of economic activity is often thought to render effective public governance both redundant and unnecessary. It is the market that will 'govern' - public authorities will not be needed to manage and regulate the international system. However, Thompson himself does not agree with this view - he feels that effective public governance of the world economy is both necessary and possible. One area which Thompson mentions and which may affect provision of tourism and countryside recreation services is standard setting. Internationally there has been a proliferation of standard setting activity. An example of this is the introduction of quality standards such as ISO 9000. The effects of globalisation on policy making at the nation state level are also important. The role of the state is fundamentally changed by globalisation, but Thompson suggests that rather than being undermined by the process, the nation state may infact be enhanced by the needs of governance. The nation state is 'the only agent that can deliver on multilateral negotiations about matters of common interest' (1999:149).

As for developments in the near future, Thompson (1999) suggests that in the wake of the East Asian economic crisis of 1997-8, the future of the international economy looks more problematic than it has for some time. There is fear that globalisation has made the international economy more vulnerable, perhaps to a general global economic crisis. However, he does not feel that conditions creating such a crisis are likely to be severe enough in the near future. Before the East Asian crisis, the World Bank predicted that the ten largest economies in the year 2020 would be China, USA, Japan, India, Indonesia, Republic of Korea, Germany, Thailand, France, Brazil. It was also predicted that the G7 share of World GDP could fall from 61% in 1995 to as little as 38% by 2020 (OECD, 1997:43). This would have drastically changed the international economic landscape in 2020. These countries would undoubtedly have had different economic agendas from the policy elites in the existing G7, so a different sentiment to neo-liberalism may prevail. Although these predictions have been shattered by recent events, what they show is that there is the potential for substantial changes in the long term. The G7 countries may not be able to control the agenda of the international economy in the year 2020 quite so easily as in 1999.

In summary:

- strong globalisation leads to loss of confidence by public authorities, and over diminished expectations of what can be achieved in respect of public policy.

- the world economy is made up of new organisations and interests. Policy makers need to learn to manage this evolving system.

- there is a range of new governance issues arising in the international economy. The issues are not beyond governance.

6.9 Summary of Key Points

Jones (1995) cited in Newihiem (1999) describes political trends as follows:

- Move from 'big' government to 'small' government:

- Move from centralisation to devolution

- Move from europhobic to euro friendly

- Move from non-interventionist to (slightly) more interventionist

- Move from wealth orientated to welfare orientated.

The implications for tourism and countryside recreation can be extrapolated as follows:

- policy likely to come more from the local and regional level, or from Europe, rather than from the national level. It is therefore hoped that local needs regarding tourism can be catered for more effectively and increased flexibility will be a feature

- it seems evident from the green taxes introduced in the budget and from the continuing importance of the sustainability agenda that tourism and countryside recreation will need to consider sustainability as part of its vision. With this concentration on green issues it is possible that the countryside will be valued more in the future. Green transport plans for tourism and recreation are essential, since otherwise attractions relying on the private car for visitors may suffer.

- funding may become a problem in some areas and the development of tourism in certain areas will be implicated by availability of lottery funds or those from the European Structural Fund, which could make a huge difference to some areas.

- no-one knows what the implications of delaying entry into Europe will be. However, tourism is likely to be affected to a larger degree and systems should prepare now.

7.0 TRANSPORT ISSUES

7.1 Likely trends in transport and travel

Clark et al (1994) argue that car ownership and personal mobility are key to the current trends in countryside recreation and in the creation of social identity. Levels of car ownership are increasing, and this trend is expected to continue, especially in rural areas where public transport provision is poor. In addition, 46% of mileage travelled in Britain is for entertainment purposes, and 78% of all holiday tourism trips involve the use of car. It is therefore closely bound to the leisure and recreation industries. Any changes in transport policy that affect the use of the car will also affect countryside recreation and leisure activities. It is also possible that car restrictions in cities will encourage more car owners to move to rural areas where the use of the car will not be so affected.

In 1992, the then Countryside Commission identified 5 key trends that are taking place regarding transport and travel in the UK. These trends are still clearly taking place today:

Counterurbanisation - people are leaving towns to live in the country. There is decentralisation of the city region so that what were rural areas surrounding a built up city area become functionally part of the city, but remain rural in visual character. The proportion of residents working in the local rural economy becomes low, with large numbers commuting to the city to work during the day. It is seems likely that this trend will continue. Short (1988) noted a shift towards residential choice being made with respect to 'lifestyle' criteria (e.g. in a 'nice area'), and job choice within a 1 hour or 48 mile radius.

Facilities and workplaces are being located on the periphery of towns especially at motorway junctions, where they are easily accessible for people with cars. Fortunately planning permission is now harder to obtain for these out of town retail centres than it was during the Thatcher years 1980-88.

With rising incomes, more people are expected to own and use cars. At the moment, increasing income tends to lead to increasing car ownership and use. The rapid rise in car travel in the late 1980s can be attributed to rising incomes, and the recession in 1990 and 1991 markedly slowed this growth. Periods of economic growth are therefore likely to be accompanied by increased car traffic.

More travel is likely to be for leisure purposes, with people valuing greater access to the countryside. The CC suggest that the 'leisure boom' may continue, especially if a shorter working week is introduced, allowing more leisure time. Residential movement and higher mobility may mean that there is more travel to visit friends and relatives.

Society is currently very car dependent, for various reasons. Personal security is one. Another is what Marsh and Collett (1988) describe as the 'love affair with the car', a strong personal attachment to the car which makes it difficult to persuade them to use other modes of transport. Commentators such as Short (1988) argue that there is a focus on the individual in society, rather than on the community. This has led to a desire for personal rather than collective modes of transport.

In 1997, the Countryside Commission stated that road traffic problems are getting steadily worse. There are 21 million cars on the road in Britain today. By 2025, forecasts say there will be 32 million. In addition to this, car occupancy levels are falling. Motorway congestion has risen every year since 1990 in all English regions. The Royal Commission on Environmental Pollution (1997) report concluded that the forecast traffic growth is 'economically, environmentally and socially unacceptable'. Fuel price increases and improvements in vehicle technology so far planned will not in themselves bring about the required improvements in air quality or reductions in greenhouse gas emissions. It seems likely that car ownership levels will continue to grow, and problems of congestion and pollution to worsen. The National Road Traffic Forecasts (NRTF) 1998 are as follows:

Year	Low Growth	Medium Growth	High Growth
1996-2016	24%	38%	51%
1996-2031	36%	60%	84%

The main single determinant of growth is increasing car ownership. Transport Trends (1998) found that the total distance travelled per person has grown by nearly 40% in the last 20 years, but the number of individual journeys has increased by only 13%. People are travelling further per trip and most of the increase is accounted for by increased use of the car. As far as countryside recreation is concerned, an RAC survey reported that 80% of country visitors arrive by car, and 80% of visits are day trips made from home. Most people therefore drive into the country at the moment to undertake leisure activities.

7.2 Government Transport Policy

The White Paper on the Future of Transport 'A New Deal for Transport: Better for Everyone' (1998) set out policies for dealing with the transport problem in the UK. The approach taken is to create 'a better, more integrated transport system to tackle the problems of congestion and pollution....while persuading people to use their cars a little less - and public transport a little more' (p.3). The direction taken is a change from the previous government's 'predict and provide' approach towards policy that is not led by road building but by demand management and a move towards an integrated transport system. The aim stated is not that car ownership will be reduced, but that the policies will change the way in which people actually use their cars. 'Integration' is a key word, both between and within public transport systems, with the environment, with land use planning, and with other policies, such as health and education. Each Local Authority is required to draw up a 5 year Local Transport Plan for their area, planning for local transport needs by both road and public transport, and introducing new measures such as traffic management schemes, road user charging and levies on parking, including work place parking. There are specific targets for certain areas, for example to double the number of cyclists from the 1996 level by 2002, and again by 2012. Cycling will be promoted by various means including the provision of more cycle lanes and the development of a national cycle network (in partnership with Sustrans). In order to make the public transport system more integrated there are proposed measures to increase bus and train use including through ticketing and better integration of the networks through timetabling and better dissemination of information to potential customers. Planning guidance will be updated to provide additional guidance on 'locations for major growth and travel generating uses, with an increased emphasis on accessibility to jobs, leisure and services by foot, bicycle and public transport' (p..). Similarly, planning guidance regarding housing development is to be altered, with preference given to brownfield sites. Planners are also to consider the public transport options for new housing developments. These measures should help to offset the counterurbanisation process mentioned above.

Perhaps the most important aspect of policy changes for leisure is the introduction of legislation to allow Local Authorities to charge road users in order to reduce congestion and to fund improvements in public transport. The White Paper recommends that road user charging is implemented in rural areas, especially in National Parks where there are often congestion problems at peak times. Charging is also recommended for trunk roads and motorways, and pilot schemes are being introduced. These schemes are designed to make the costs paid by motorist more reflective of the true cost of driving, and that includes the cost to the environment. This is also being pursued for aircraft fuel, which at present is exempt from fuel tax and environmental levies. This will mean that the cost of air travel will increase, again to reflect the true cost to the environment. The government plans to use other economic instruments to manage demand, including differential pricing schemes (for example making vehicle tax lower on cars with 1100cc engine capacity or less) and by an increase in fuel duty of at least 6% on average above the rate of inflation. The introduction of these policies will serve to make driving considerably more expensive, and should increase the attractiveness of public transport, walking and cycling, especially when coupled with improvements to these alternatives to the private car.

The extent to which these measures are employed depends on the choices made by the Local Authority in drawing up the Local Transport Plan. However, many National Park areas are implementing traffic management schemes already in order to prevent congestion during peak holiday times. For example, a collection of local authorities and other concerned bodies commissioned a study on sustainable tourism development in Northern Snowdonia. Bishop et al (1998) undertook the research, and recommended several schemes to increase the use of public transport in the area. These included development and integration of the local bus services, introduction of 'gateways' for park and ride or public transport (where people can easily enter the park via public transport, or leave their car in a secure parking area and continue their journey by bus), and an integrated travel pass for bus and car parking. It is likely that other National Park areas will implement similar schemes if they prove to be successful in Snowdonia.

It is interesting to note that John Prescott has become increasingly unpopular in recent months. In a recent Guardian poll (July 1999), the transport department was the least popular, with only 31% of people being happy with the transport Minister and Department, compared to figures around 60% for other departments such as health and education. Despite the positive policies in the White Paper, the general feeling is that changes the transport system are not appearing. Prescott has argued that this is a result of 20 years of neglect of the public transport system, but despite this transport issues have been sidelined by the government, and have not received any Parliamentary time this year.

7.3 Technological Advances

It is possible that advances in technology could offset some of the additional costs of motoring. For example, improvements in fuel efficiency could reduce the impact of increases in fuel prices. McLaren et al (1998) argue that major technological improvements to reduce car weight and increase drive efficiency are possible. Prototype cars already exist which average a fuel consumption of 100 miles per gallon, such as the Renault Vesta (the current average for new cars in the UK is 37.5 mpg). They suggest that efforts have been concentrated on safety and emissions rather than efficiency, because these are the areas on which recent legislation has concentrated. Extrapolating from the Royal Commission on Environmental Pollution targets, they believe a 50% improvement in fuel efficiency for new cars by 2010 is feasible. Clearly if more fuel efficient cars are promoted by manufacturers and/or the government, the effect of the fuel escalator will be less noticeable. On a similar theme, the Rocky Mountain Institute in the USA has developed the hyper car concept. By combining an ultra lightweight construction (mainly carbon and glass fibre substitutes for steel) with a hybrid electric engine and a number of energy saving devices, a ten fold reduction in fuel use has been achieved. These cars have been designed to be powered by different energy sources, and non-fossil fuel sources are currently being developed. Clearly there is potential for developing such alternatives to the traditional motor car, but McLaren et al believe that it is unlikely that car manufacturers develop these cars unless they are forces to, for example by financial incentives.

Experiments have been carried out involving other 'alternative' cars. Some local councils (e.g. Bristol) have introduced a small fleet of buses which run on natural gas. Electric trolley buses are used in Leeds, with electric guideways to reduce journey times. This system has increased bus use by 60% in 2 and a half years on the affected routes (Hamer 1998). An ultralight weight tram is being trailed in Bristol, which is powered by a flywheel and therefore needs no expensive overhead wiring.

Technological improvements also have the potential to make public transport more attractive by providing information at bus stops/railway stations regarding real time services and delays, giving people more information about when the next bus will arrive. The development of teleworking and internet shopping will also serve to reduce the number of cars on the road.

Giles and Perry (1998) draw attention to technological improvements in the airline industry, which have allowed charter airlines to invest in quieter, larger, more fuel efficient fleets with an extended non-stop destination range. These improvements have allowed the cost of travelling by air to be reduced due to economies of scale (e.g. staff reductions, serve long and short haul destinations, lower operating costs), and as a result, seats can be sold to tour operators for far less than 10 years ago. This has contributed to the growth in popularity of overseas short and long haul package holidays in recent years. Giles and Perry (1998) predict that long haul packages especially will continue to increase in popularity.

7.4 Impacts on Leisure

If road user charging becomes widespread in an attempt to curb the increasing use of cars and associated problems of congestion and pollution, there will be serious ramifications for the leisure and tourism industries. Access to leisure facilities is often dependent on the private car, especially in rural areas, which lack effective public transport systems. The short holiday market and day visitor trade has also been stimulated by progressive improvements in road transport (DoE 1996). The DoE (1996) state that restrictions on the use of private cars would have an adverse impact on the development of tourism in rural areas. Cross (1994) feels that hard pressed countryside areas that need to exploit rural tourism will suffer the most from road pricing, which may 'strangle the goose' (p.5). Leisure Consultants (1998) argue that unsolved traffic and congestion problems themselves may serve as a possible constraint on the expansion of day visiting, causing day trips to be substituted by local entertainments. The DoE (1996) also recognise this danger, and state that transport improvements will be important in ensuring accessibility to popular short-term destinations without more congestion and pollution. 'Domestic tourism will only flourish if the travel experience compares well with the delays and stresses of air travel overseas' (DoE 1996 p207). However, the Countryside Commission (1992) suggest that the increasing levels of motor vehicles in cities and towns may cause such a deterioration of the city environment that people who live in these areas will either move to rural areas or will undertake more day visits to the countryside in order to escape the poor urban environment.

In summary, the evidence seems to suggest that the combination of road pricing and potential for congestion and delays mean that people will not want to drive to the countryside as much as previously. However, they will still want to get out to the countryside, due to the poor urban environment. If the government's White Paper policies are put into action then it should be easier for people to get to countryside locations using public transport. Rural areas are mentioned specifically as suffering from poor public transport networks, and the government plans to address this problem. There are also schemes such as the Countryside Agencies 'Quiet Roads' and the development of 'greenways' (traffic free routes within the countryside and from towns and cities to the countryside). The White Paper also proposes promotion of cycling, which could well increase visits to the countryside by bicycle. The implications are that the development of traffic management schemes (such as those mentioned above) and the promotion of public transport to leisure sites are likely to be essential to ensure that tourism does not suffer in particular areas as a result of the increased expense of motoring and associated problems of driving.

The other area where changes may have important impacts on leisure and tourism in the UK is that of air travel. If the cost of air travel is increased to represent the true cost including that to the environment, this could cause a decrease in the number of overseas visits by residents of the UK, and also a decrease in the number of overseas visitors to this country from overseas. This could have serious impacts on the domestic tourism market.

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