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Wales Outdoor Recreation Survey 2014: Final Report

Published: July 2015

260-119555

Foreword

Background

This publication is the main results report from the 2014 Welsh Outdoor Recreation Survey, undertaken by TNS and commissioned by Natural Resources Wales. A Technical Report accompanies this document and is available separately.

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Official Statistics

The information within this report is categorised as Official Statistics, and has been produced and published according to arrangements approved by the UK Statistics Authority.

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Contents

Foreword	3
Executive summary	5
Crynodeb Gweithredol	9
Section 1: Survey details	13
Section 2: Overall participation	18
Amount and frequency of participation	20
Types of activities	26
Types of places	30
Barriers to participation	31
Section 3: Visits to the outdoors	34
What do people do?	36
Where do people go?	42
Who do people go with?	49
Why do they go?	54
Expenditure	56
Health	60
Section 4: Future demand	63
Future demand	65
Barriers to increasing participation	70
Section 5: Environment Attitudes and Behaviours	72
Environmental attitudes and behaviours	74
Awareness of biodiversity in Wales	75
Concerns about changing biodiversity	77
Actions taken to protect nature and the environment	78
Section 6: Summary of key findings	83
Appendix 1: Questionnaire	86



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Executive Summary

Background

This publication is the main report from the 2014 Wales Outdoor Recreation Survey (WORS) commissioned by Natural Resources Wales. A total of 5,995 telephone interviews were conducted between January 2014 and January 2015 with adults aged 16+ living in Wales, with the results weighted to be representative of the adult population in Wales and the visits they take. The approach followed was comparable to that used in the previous WORS surveys in 2008 when 6,045 interviews were undertaken and in 2011 when 6,393 interviews were undertaken. The survey focuses on public engagement with the natural environment, including participation in outdoor recreation, health and economic benefits, attitudes to biodiversity and pro-environmental behaviours

Throughout this report, the focus in the commentary is on statistically significant differences between sub-groups within the 2014 sample and statistically significant differences between the 2008, 2011 and 2014 results. This means changes between survey years, or differences in population sub-groups that are unlikely to be due to sampling error or random chance. Guidance on the significance of figures shown in charts and tables can be found throughout the report.

Further guidance on the accuracy of results can be found in the accompanying Technical Report.

Key findings:

Overall participation

- Overall participation in outdoor visits in the last 12 months remained high in the 2014 survey, with the vast majority of the population having taken at least one visit during this period (93%).
- While over four-fifths of the population had taken a visit in the last 4 weeks in 2014 (84%), this represented a decrease from the 2011 proportion of 88%. This change was largely influenced by a decrease in the frequency of visits taken, with a lower proportion having visited 21 times or more in the last 4 weeks in the most recent survey (22% in 2014 compared to 27% in 2011 and 26% in 2008). As shown later in this report, decreases were also recorded in shorter, closer to home visits which are more likely to be taken more frequently than longer visits taken further afield.
- Age was a consistent factor in relation to propensity to visit the outdoors. For both visits in the last 12 months and the last 4 weeks, members of the adult population in Wales aged 75 and over were least likely to have taken visits.
- There was a crossover between age and other characteristics of those less likely to have taken a visit. With the exception of Communities First area residents, the other demographic groups less likely to have taken visits, such as those with a long-term illness or disability, were characterised by higher than average proportions of those aged 75 and over compared to other groups within the population.
- While walking remains the most dominant activity undertaken, increases were recorded between 2011 and 2014 for running, both on visits in the last 12 months and the last 4 weeks.
- As in previous years, there was varying importance placed on several barriers to visiting the outdoors depending on whether these related to the last 12 months or the last 4

weeks. For the longer 12 month period, health related barriers had greater prominence, whereas a lack of time and the weather were more frequently cited as reasons for not visiting in the last 4 weeks.

Visits to the outdoors

- While walking remained the most frequently undertaken main activity, a decrease was recorded when compared to 2011 (60% and 66% respectively).
- There has been a decrease in short duration visits, with the proportion of visits where the main activity was undertaken for less than an hour falling consistently over time - from 27% in 2008 to 23% in 2014. This corresponds with a decrease in the proportion of visits lasting less than an hour in total.
- The decrease in shorter visits was also accompanied by a decrease in visits close to home (taken within a mile of the visit start point), which decreased from 46% in 2011 to 38% in 2014.
- There was an increase in the proportion of visits involving a party of 4 or more people recorded in 2014, with these visits more likely to be taken by infrequent visitors (those who visited 20 times or less in the last 4 weeks).
- Health or exercise was the most frequently cited motivation for visiting the outdoors (23%), closely followed by exercising a dog (22%). Visits taken for health or exercise were more likely than the average to be under 3 hours in duration, however, the visit destinations were more varied, including both local destinations and some that require a greater amount of travel (e.g. hills/ mountains/ moorland).
- Visits involving any spend were more likely to be taken to destinations selected by infrequent visitors and those more likely to be included in visits lasting for 3 hours or more, in particular, the beach and the sea. Levels of spend were also higher on visits where the main activities were sightseeing/ visiting attractions or visiting children's playgrounds/ other outdoor areas.

Future demand

- Overall, six in ten members of the adult population in Wales would like to visit the outdoors for recreation more often (60%), a figure which has remained consistent since 2008. Demand was higher in 2014 amongst those already more likely to visit the outdoors, with those who had taken a visit in the last 4 weeks more likely to be interested in visiting more often than those who had not.
- Interest in specific activities did not vary significantly for the most part with the exception of increased interest in walking, an activity which decreased in 2014 in terms of actual participation.
- The destinations of greatest interest overall were ones that typically involve a greater amount of travel – beaches and mountains/ hills/ moorland. As shown previously, visits taken to destinations further afield are more likely to incur some level of spend, particularly visits to beaches but are less likely to be taken on a frequent basis.
- As with visits taken in the last 4 weeks, a lack of time and poor weather were the most frequently cited barriers in relation to not visiting the outdoors more often, or indeed at all, in the last 12 months. Given that health considerations were more likely to be cited as a reason for not visiting in the last 12 months, it is likely that the higher future demand amongst current visitors had an influence over the barriers cited in relation to visiting more often.

Awareness and concern for nature and biodiversity in Wales

- Overall, members of the adult population of Wales indicated a reasonable level of concern regarding biodiversity, with around two-fifths (43%) stating that they were 'very quite' concerned about this. Around 3 in 10 felt that there had been a decrease in biodiversity in Wales in recent years (31%) and around two-fifths that there would be a decrease in the future (38%). Around a quarter felt that there would be an increase in the future (27%).
- Age was a common factor when analysing attitudes towards biodiversity. Younger people aged 16 to 24 were more likely than the average to believe that there had been no change, while those aged 55 to 74 were more likely to believe that there had been a decrease and those aged 35 to 54 that were would be decrease in the future. Those aged 35 and over were more likely than younger members of the population to indicate a high level of concern regarding biodiversity in Wales.
- Variations in perceptions were also evident according to whether respondents had visited the outdoors in the last 4 weeks or not. Those who had visited the outdoors were more likely to have perceived a past increase in biodiversity but were more likely than non-visitors to believe that this would decrease in the future. Frequent visitors to the environment (21+ visits in the last 4 weeks) were more likely than the average to participate in several activities to protect it, particularly walking or cycling rather than taking the car.
- While it is not possible to determine what influence concern and action have over each other, if any, variations were evident in relation to participation in behaviours that would benefit the environment amongst those who were 'very' or 'quite' concerned about biodiversity. In particular, those who expressed such levels of concern were more likely to have participated in activities that require a greater investment of effort, time and/or finances such as joining organisations that protect the environment and/or volunteering.



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Crynodeb Gweithredol

Cefndir

Y cyhoeddiad hwn yw'r prif adroddiad o Arolwg Hamdden Awyr Agored Cymru 2014 a gomisiynwyd gan Gyfoeth Naturiol Cymru. Cynhaliwyd 5,995 o gyfweiliadau ffôn rhwng Ionawr 2014 ac Ionawr 2015 gydag oedolion 16+ yn byw yng Nghymru, gyda'r canlyniadau yn cael eu pwysoli i gynrychioli'r boblogaeth o oedolion yng Nghymru a'r ymweliadau maent yn eu gwneud. Roedd y dull a ddefnyddiwyd yn gymharol i'r hyn a ddefnyddiwyd mewn arolygon Hamdden Awyr Agored Cymru blaenorol yn 2008 pan gyflawnwyd 6,045 o gyfweiliadau ac yn 2011 pan gyflawnwyd 6,393 o gyfweiliadau. Mae'r arolwg yn ffocysu ar ymgysylltiad y cyhoedd â'r amgylchedd naturiol, yn cynnwys cymryd rhan mewn hamdden awyr agored, iechyd a buddion economaidd, agweddau i fioamrywiaeth ac ymddygiadau sy'n ffafriol i'r amgylchedd.

Trwy gydol yr adroddiad hwn, mae'r ffocws yn y sylwadau ar wahaniaethau sy'n ystadegol arwyddocaol rhwng is-grwpiau yn sampl 2014 a gwahaniaethau sy'n ystadegol arwyddocaol rhwng canlyniadau 2008, 2011 a 2014. Ymddengys bod rhai ffigurau'n cynrychioli newid rhwng arolygon neu rhwng y cyfartaledd ar draws yr holl ymatebwyr ac is-grŵp yn y sampl, ond oherwydd meintiau sampl, ni ellir honni eu bod yn ystadegol arwyddocaol ac efallai nad ydynt yn real. Ceir canllaw ar arwyddocâd yr ystadegau a welir yn y siartiau a thablau trwy gydol yr adroddiad.

Ceir canllaw pellach ar gywirdeb y canlyniadau yn yr Adroddiad Technegol ategol.

Canfyddiadau allweddol:

Cyfranogiad cyffredinol

- Roedd cyfranogiad cyffredinol mewn ymweliadau awyr agored yn y 12 mis diwethaf wedi parhau i fod yn uchel yn arolwg 2014, gyda'r mwyafrif helaeth o'r boblogaeth wedi cymryd o leiaf un ymweliad yn ystod y cyfnod hwn (93%).
- Er bod pedwar o bob pump o'r boblogaeth wedi cymryd ymweliad yn y 4 wythnos diwethaf yn 2014 (84%), roedd hyn yn cynrychioli lleihad o gyfran 2011 o 88%. Roedd y newid hwn wedi ei ddylanwadu'n bennaf gan leihad yn amlder yr ymweliadau, gyda chyfran is wedi ymweld 21 o weithiau neu fwy yn y 4 wythnos ddiwethaf yn yr arolwg mwyaf diweddar (22% yn 2014 o gymharu â 27% yn 2011 a 26% yn 2008). Fel y gwelir yn hwyrach yn yr adroddiad hwn, cofnodwyd gostyngiadau hefyd mewn ymweliadau byrrach, agosach at adref sy'n fwy tebygol o ddigwydd yn amlach nag ymweliadau hirach yn bellach i ffwrdd.
- Roedd oed yn ffactor gyson parthed tebygolrwydd i ymweld â'r awyr agored. Ar gyfer ymweliadau yn y 12 mis diwethaf a'r 4 wythnos ddiwethaf, roedd aelodau'r boblogaeth o oedolion yng Nghymru sydd dros 75 oed y lleiaf tebygol o fod wedi mynd ar ymweliadau.
- Roedd trosiant rhwng oed a nodweddion eraill y rhai sy'n llai tebygol o fod wedi mynd ar ymweliad. Ac eithrio preswylwyr ardaloedd Cymunedau'n Gyntaf, roedd y grwpiau demograffig eraill oedd yn llai tebygol o fod wedi mynd ar ymweliadau, megis y rhai gyda salwch hirdymor neu anabledd, wedi eu nodweddu gan gyfrannau uwch na'r cyfartaledd o rai 75 oed neu hŷn o gymharu â grwpiau eraill yn y boblogaeth.

- Er bod cerdded yn parhau i fod y prif weithgaredd a gyflawnir, cofnodwyd cynnydd rhwng 2011 a 2014 ar gyfer rhedeg, ar gyfer ymweliadau yn y 12 mis diwethaf ac yn y 4 wythnos ddiwethaf.
- Fel gyda'r blynyddoedd blaenorol, rhoddwyd pwysigrwydd amrywiol ar nifer o rwystrau i ymweld â'r awyr agored yn ddibynnol ar a oedd y rhain yn ymwneud â'r 12 mis diwethaf neu'r 4 wythnos ddiwethaf. Ar gyfer y cyfnod 12 mis hirach, roedd gan rwystrau yn ymwneud ag iechyd fwy o amlygrwydd, tra bod diffyg amser a'r tywydd yn cael eu nodi'n amlach fel rhesymau dros beidio ymweld yn y 4 wythnos ddiwethaf.

Ymweliadau â'r awyr agored

- Er mai cerdded oedd y prif weithgaredd a gyflawnwyd amlaf, cofnodwyd lleihad o gymharu â 2011 (60% a 66%) yn y drefn honno).
- Cafwyd lleihad mewn ymweliadau cyfnod byr, gyda'r gyfran o ymweliadau ble roedd y prif weithgaredd a gyflawnwyd am lai nag un awr yn gostwng yn gyson gydag amser – o 27% yn 2008 i 23% yn 2014. Mae hyn yn cyfateb i leihad yn y gyfran o ymweliadau sy'n parhau llai nag awr i gyd.
- Yn cyd-fynd â'r lleihad mewn ymweliadau byrrach roedd lleihad mewn ymweliadau agosach at adref (a gymerwyd o fewn milltir i fan cychwyn yr ymweliad), a ostyngodd o 46% yn 2011 i 38% yn 2014.
- Cafwyd cynnydd yn y gyfran o ymweliadau yn ymwneud â pharti o 4 neu fwy o bobl a gofnodwyd yn 2014, gyda'r ymweliadau hyn yn fwy tebygol o fod wedi eu cymryd gan ymwelwyr anaml (y rhai a ymwelodd 20 o weithiau neu lai yn ystod y 4 wythnos diwethaf).
- Iechyd neu ymarfer corff oedd yr ysgogiad a grybwyllwyd amlaf ar gyfer ymweld â'r awyr agored (23%), gyda cherdded y ci yn dilyn yn agos (22%). Roedd ymweliadau ar gyfer iechyd neu ymarfer corff yn fwy tebygol na'r cyfartaledd o fod dan 3 awr o hyd, fodd bynnag, roedd y cyrchfannau ymweld yn fwy amrywiol, yn cynnwys cyrchfannau lleol a rhai sydd angen mwy o deithio (e.e. bryniau/mynyddoedd/gweundir).
- Roedd ymweliadau ble cafwyd unrhyw wariant yn debygol o gael eu cymryd i gyrchfannau a ddetholwyd gan ymwelwyr anaml a'r rhai oedd fwyaf tebygol o gael eu cynnwys mewn ymweliadau yn parhau am 3 awr neu fwy, yn arbennig y traeth a'r môr. Roedd lefelau gwariant hefyd yn uwch ar ymweliadau ble roedd y prif weithgareddau yn gweld golygfeydd/ymweld ag atyniadau neu ymweld â llefydd chwarae plant/ardaloedd awyr agored eraill.

Galw yn y dyfodol

- Ar y cyfan, dim ond chwech o bob deg aelod o'r boblogaeth o oedolion yng Nghymru fyddai'n hoffi ymweld â'r awyr agored ar gyfer hamdden yn fwy aml (60%), ffigwr sydd wedi parhau i fod yn gyson ers 2008. Roedd galw yn uwch ymysg y rhai sydd eisoes yn fwy tebygol o ymweld â'r awyr agored, gyda'r rhai oedd wedi mynd ar ymweliad yn y 4 wythnos ddiwethaf yn fwy tebygol o fod â diddordeb mewn ymweld yn amlach na'r rhai nad oedd.
- Ni wnaeth diddordeb mewn gweithgareddau penodol amrywio'n arwyddocaol gan fwyaf ac eithrio diddordeb cynyddol mewn cerdded, gweithgaredd a ostyngodd yn 2014 yn nhermau gwir gyfranogiad.
- Y cyrchfannau oedd o'r diddordeb mwyaf ar y cyfan oedd y rhai oedd yn galw am fwy o deithio – traethau a mynyddoedd/bryniau/gweundir. Fel y dangoswyd yn flaenorol, mae

ymweliadau â chyrchfannau pellach i ffwrdd yn fwy tebygol o alw am ryw lefel o wariant, yn enwedig ymweliadau â thraethau, ond yn llai tebygol o gael eu cymryd yn rheolaidd.

- Fel gydag ymweliadau yn y 4 wythnos ddiwethaf, roedd diffyg amser a thywydd garw'r rhwystrau a grybwyllwyd amlaf parthed peidio ymweld â'r awyr agored yn amlach, neu yn wir o gwbl, yn y 12 mis diwethaf. O ystyried bod ystyriaethau iechyd yn fwy tebygol o gael eu nodi fel rheswm dros beidio ymweld yn y 12 mis diwethaf, mae'n debygol y byddai'r galw uwch yn y dyfodol ymysg ymwelwyr presennol yn cael dylanwad ar y rhwystrau a ddyfynnwyd parthed ymweld yn amlach.

Ymwybyddiaeth a phryder o ran natur a bioamrywiaeth yng Nghymru

- Ar y cyfan, nododd aelodau o boblogaeth Cymru sy'n oedolion lefel rhesymol o bryder parthed bioamrywiaeth, gyda thua dau bumed (43%) yn nodi eu bod yn poeni 'yn fawr' neu 'dipyn' am hyn, Teimlai tua 3 o bob 10 y cafwyd lleihad mewn bioamrywiaeth yng Nghymru yn y blynnyddoedd diwethaf (31%) a theimlai tua dau bumed y byddai lleihad yn y dyfodol (38%). Roedd tua chwarter yn teimlo y byddai cynnydd yn y dyfodol (27%).
- Roedd oed yn ffactor gyffredin wrth ddadansoddi agweddau tuag at fioamrywiaeth. Roedd pobl iau 16-24 oed yn fwy tebygol na'r cyfartaledd i gredu na fu unrhyw newid, tra bod y rhai 55 i 74 oed yn fwy tebygol o gredu y cafwyd lleihad a'r rhai 35-54 y byddai lleihad yn y dyfodol. Roedd y rhai 35 oed neu hŷn yn fwy tebygol nag aelodau iau'r boblogaeth i ddynodi lefel uchel o bryder o ran bioamrywiaeth yng Nghymru.
- Roedd amrywiaethau mewn dehongliadau hefyd yn amlwg yn ôl p'un a oedd ymatebwyr wedi ymweld â'r awyr agored yn y 4 wythnos ddiwethaf neu beidio, Roedd y rhai oedd wedi ymweld â'r awyr agored yn fwy tebygol o fod wedi dehongli cynnydd mewn bioamrywiaeth yn y gorffennol ond yn fwy tebygol na rhai nad oedd yn ymweld i gredu y byddai hyn yn lleihau yn y dyfodol. Roedd ymwelwyr cyson â'r amgylchedd (21+ o ymweliadau yn y 4 wythnos ddiwethaf) yn fwy tebygol na'r cyfartaledd i gymryd rhan mewn nifer o weithgareddau i'w ddiogelu, yn arbennig cerdded neu seiclo yn hytrach na gyrru.
- Er nad yw'n bosibl pennu pa ddylanwad sydd gan bryder a gweithredu dros ei gilydd, os o gwbl, roedd amrywiaethau yn amlwg parthed cyfranogiad mewn ymddygiadau a fyddai'n fuddiol i'r amgylchedd yn erbyn y rhai oedd â phryder 'mawr' neu 'dipyn' am fioamrywiaeth. Yn benodol, roedd y rhai a fynegodd lefelau o'r fath o bryder yn fwy tebygol o fod wedi cymryd rhan mewn gweithgareddau sydd angen mwy o fuddsoddiad o ran ymdrech, amser ac/neu gyllid megis ymuno â sefydliadau sy'n diogelu'r amgylchedd ac/neu wirfoddoli.



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Section 1: Survey Details

Background

Natural Resources Wales (NRW) was formed in April 2013, incorporating the work of the Countryside Council for Wales, Forestry Commission Wales and the Environment Agency in Wales, as well as certain Welsh Government functions. As part of their role, NRW gather evidence on use of and enjoyment of the natural environment, which is used for monitoring purposes and to advise relevant stakeholders on issues relating to the natural environment.

Following a pilot in 2007, the 2008 and 2011 Welsh Outdoor Recreation Surveys (WORS) were commissioned. These surveys involved just over 6,000 interviews with adult residents of Wales providing measurement of the following key areas:

- Frequency of participation in outdoor recreation;
- Activities undertaken;
- Places visited;
- Motivations for visiting the outdoors;
- Barriers to visiting the outdoors;
- Health;
- Levels of 'future demand' to participate in more outdoor recreation.

As part of their continued commitment to monitoring levels of engagement with the natural environment in Wales, NRW commissioned TNS to undertake a repeat of the survey in 2014.

The objectives of the survey were to provide:

- A robust quantitative evidence base on participation in outdoor recreation by adults living in Wales in 2014, mainly replicating the 2011 survey.
- To provide new data relating to expenditure, specific visit destinations, environmental attitudes and behaviours.
- A statistically valid comparison of data between 2008, 2011 and 2014, including the identification of significant changes in all aspects of participation.

Methodology

Data Collection

Fieldwork for the survey was undertaken between 8th January 2014 and 11th January 2015.

A total of 5,995 telephone interviews were carried out during this period with adults aged 16+ living in Wales. The approach followed was comparable to that used in the previous surveys when, respectively, 6,045 and 6,393 interviews were conducted.

Interviews lasted an average of 15 minutes and were conducted on all days of the week (including weekends) and at different times of the day and month.

Data weighting

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

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

Results from questions 4 to 16a relate to the respondent's most recent trip to the outdoors. Information from these questions has been weighted so that the results are representative of all visits taken to the outdoors by the adult population of Wales during the survey period.

Please see Appendix 1 for details of the questions that the weights discussed above refer to.

Questionnaire

The 2014 questionnaire was designed to largely replicate that used in the 2008 and 2011 survey to facilitate comparison between the results from the three surveys. Some amendments were made to provide data on areas of interest for both policy and practice including the addition of a new section at the end of the survey regarding nature and biodiversity. Also, two additional questions were added for more detailed information concerning the place that was visited and two questions concerning what respondents money spent on during their trips.

A copy of the 2014 questionnaire can be found in Appendix 1.

A full Technical Report outlining the survey methods is available separately.

Reporting variations over time

While the data for WORS has been collected at three intervals over a six year period, any variations in the data should be treated as indicative rather than evidence of trends. In this report, significant variations between 2011 and 2014 are highlighted within the commentary and where appropriate, any consistencies or variations across the whole period (2008 – 2014). In addition, statistically significant differences between sub-groups within the 2014 sample have also been highlighted. Guidance on the significance of figures shown in charts and tables can be found throughout the report.

Definitions

Detailed below are definitions for some of the analysis categories used in this report.

Outdoor visits

Respondents were presented with the following list of activities and asked if they had done any of them in the outdoors in the last 12 months and those who had were asked if they had done any in the last 4 weeks. Those who had taken part in one or more of list of activities below in the last 4 weeks were defined as having taken an outdoor visit. A detailed series of questions was then asked of these respondents regarding their most recent visit to the outdoors involving one or more of these activities and the results of these questions were weighted to produce data representative of visits taken by the Welsh adult population across the survey period.

- Walking
- Road cycling
- Off-road cycling or mountain biking
- Horse riding
- Fishing
- Rock climbing or caving
- Motorised watersports
- Other watersports
- Swimming outdoors
- Snowsports
- Field sports (shooting/hunting)
- Air sports (hang gliding/ballooning)
- Wildlife watching
- Running
- Sightseeing or visiting an attraction
- Off-road driving or motorcycling
- Picnicking (as a significant part of the activity)
- Visiting children's playgrounds/taking children to play areas outdoors
- Informal games (e.g.Frisbee or golf)
- Other outdoor activities

Frequency

This refers to the number of visits taken by all respondents during the 4 weeks prior to interview. Respondents have been classified into the following three groups:

- Frequent – have taken 21 or more visits to the outdoors in the last 4 weeks.
- Infrequent – have taken between 1 and 20 visits to the outdoors in the last 4 weeks.
- Non-visitors – have taken no outdoor visits within the last 4 weeks (including those who have taken no visits for at least 12 months).

Welsh Index of Multiple Deprivation (WIMD)

The Welsh Index of Multiple Deprivation is the official measure of deprivation in Wales. The categories that featured in the analysis of the 2014 Welsh Outdoor Recreation Survey were the bottom 10%, 20% and 30% WIMD areas (most deprived areas) and the top 10% (least deprived areas). For more information, see the Welsh Government website:

www.wales.gov.uk/topics/statistics/theme/wimd/?lang=en

When interpreting the data across surveys, it is important to note that the WIMD categorisation has been updated since 2011. The methodology to calculate the Index has largely remained the same with changes to a small number of indicators. Further details can be found at:

www.wales.gov.uk/wimd

Communities First

Communities First is a Welsh Government programme aimed at improving living conditions for those living in the most deprived communities in Wales. For more information see the Welsh Government website:

<http://gov.wales/topics/people-and-communities/communities/communitiesfirst/?lang=en>

Between 2011 and 2014, the Communities First area designations were revised into a list of 52 areas, which differ from those used in the previous classification. The Communities First figures quoted in this report use the new classification and are therefore, not directly comparable. However, analysis based on both the old and new classifications has been run and can be found in the accompanying data tables.

Urban/ rural

The urban/ rural classifications are based on data from the National Statistics website (see www.ons.gov.uk/ons/guide-method/geography/products/area-classifications/rural-urban-definition-and-la/index.html). For the purposes of this survey and to match those used in 2008 and 2011, these areas were grouped into the following analysis categories:

- Urban
- Town and Fringe
- Village, Hamlet & Isolated Dwellings

Survey Outputs

Tables presenting the full findings from the survey, a Technical Report and a Summary Report are also available and can be obtained on the NRW website.

www.cyfoethnaturiolcymru.gov.uk / www.naturalresourceswales.gov.uk



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Section 2: Overall Participation

The results in this section relate to the overall frequencies of visits taken to the outdoors by the Welsh adult population within the last 12 months and in the last 4 weeks, covering the activities undertaken and the types of places visited.

Key findings:

- Overall participation in outdoor visits in the last 12 months remained high in the 2014 survey, with the vast majority of the population having taken at least one visit during this period (93%).
- While over four-fifths of the population had taken a visit in the last 4 weeks in 2014 (84%), this represented a decrease from the 2011 proportion of 88%. This change was largely influenced by a decrease in the frequency of visits taken, with a lower proportion having visited 21 times or more in the last 4 weeks in the most recent survey (22% in 2014 compared to 27% in 2011 and 26% in 2008). As shown later in this report, decreases were also recorded in shorter, closer to home visits which are more likely to be taken more frequently than longer visits taken further afield.
- Age was a consistent factor in relation to propensity to visit the outdoors. For both visits in the last 12 months and the last 4 weeks, members of the adult population in Wales aged 75 and over were least likely to have taken visits.
- There was a crossover between age and other characteristics of those less likely to have taken a visit. With the exception of Communities First area residents, the other demographic groups less likely to have taken visits, such as those with a long-term illness or disability, were characterised by higher than average proportions of those aged 75 and over compared to other groups within the population.
- While walking remains the most dominant activity undertaken, increases were recorded between 2011 and 2014 for running, both on visits in the last 12 months and the last 4 weeks.
- As in previous years, there was varying importance placed on several barriers to visiting the outdoors depending on whether these related to the last 12 months or the last 4 weeks. For the longer 12 month period, health related barriers had greater prominence, whereas a lack of time and the weather were more frequently cited as reasons for not visiting in the last 4 weeks.

2.1 Amount and frequency of participation

Visits in last 12 months

Respondents were presented with a list of outdoor activities (see Section 1: Definitions) and asked which, if any, they had undertaken on visits to the outdoors in the last 12 months. This list of activities was deliberately very broad to ensure that all types of outdoor recreation, in all types of environment were recorded.

In all three survey years, the vast majority of the adult population in Wales had undertaken one or more of these activities on an outdoor visit during the 12 months prior to being interviewed (93% in 2014) with no significant variations between surveys.

Figure 2.1 (overleaf) compares levels of visit taking in the last 12 months by the various demographic groups. Variations in participation were recorded by age, particularly for those aged 75 and over. These respondents were notably less likely than those aged 74 and under to have taken visits during the last 12 months (71% and 95% respectively).

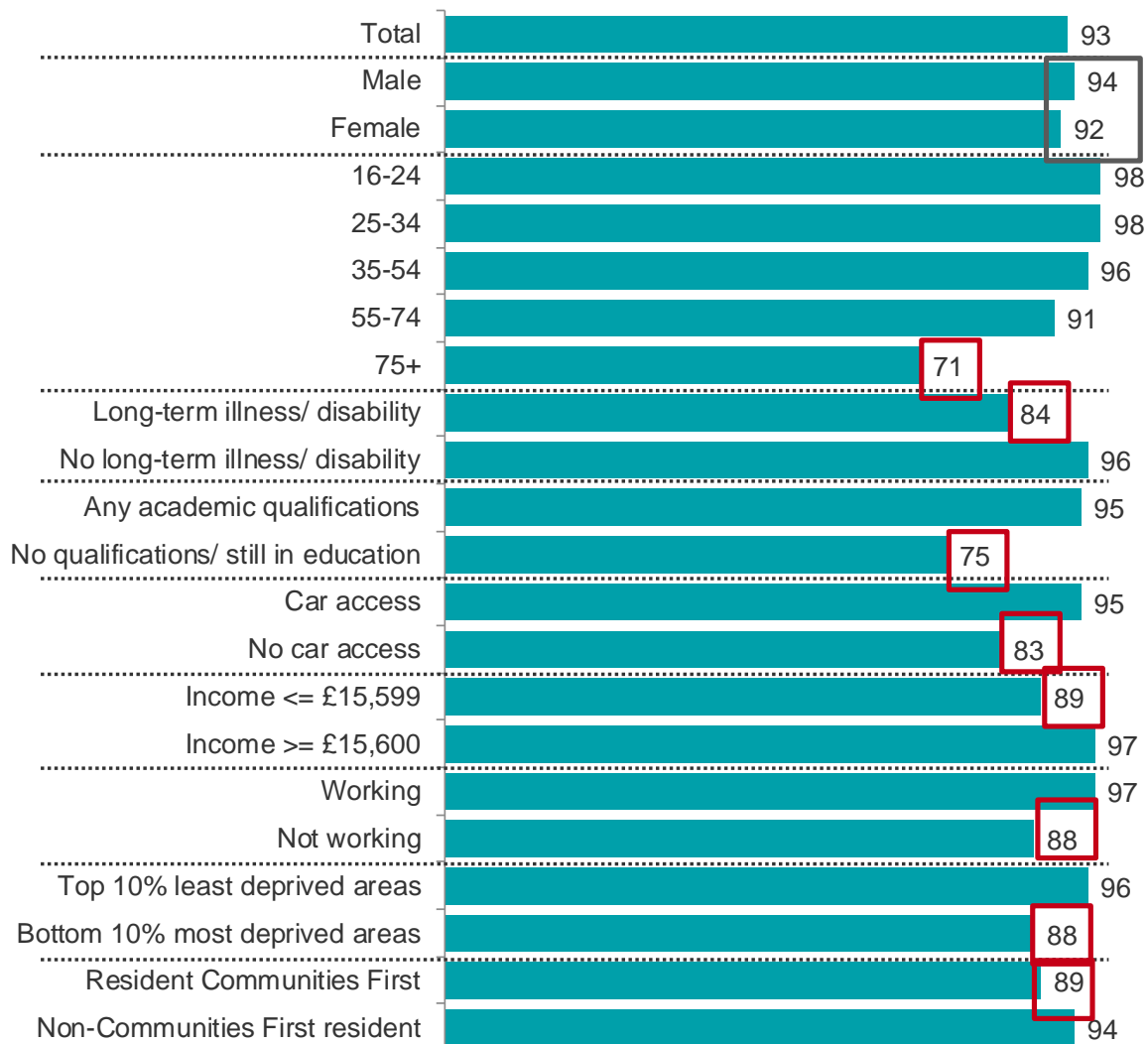
In 2014, varying levels of participation in the last 12 months were also recorded by:

- Long-term illness/ disability: 96% of those with no long-term illness or disability compared to 84% of those with.
- Car access: 95% of those with access had taken a visit compared to 83% without.
- Academic qualifications: 95% with any academic qualifications compared to 75% of those with no qualifications.
- Working status: 97% of those in paid employment compared to 88% who were not.
- Household income: 97% of those with a household income above £15,600 compared to 89% of those with an income less than £15,599.
- Communities First: 96% of those not resident in a Communities First area compared to 89% of those who were.

Age was a common factor across the demographic groups above. With the exception of Communities First residents, those aged 75+ were over-represented in the groups identified as being less likely to have taken a visit e.g. 20% of those with a long-term illness or disability were aged 75+ compared to 6% of those without.

Figure 2.1 Visits taken in last 12 month by demographic groups (2014, %)

Base: All respondents (2014 – 5,995)



Figures inside a red box square are significantly lower than the total e.g. 71% of non-visitors were aged 75+ had taken a visit in the last 4 weeks compared to 93% overall, while figures outlined in grey highlight significant variations within that demographic group

Visits in last 4 weeks

In 2014, the majority of the adult population in Wales had taken at least one visit to the outdoors in the 4 weeks prior to interview (84%).

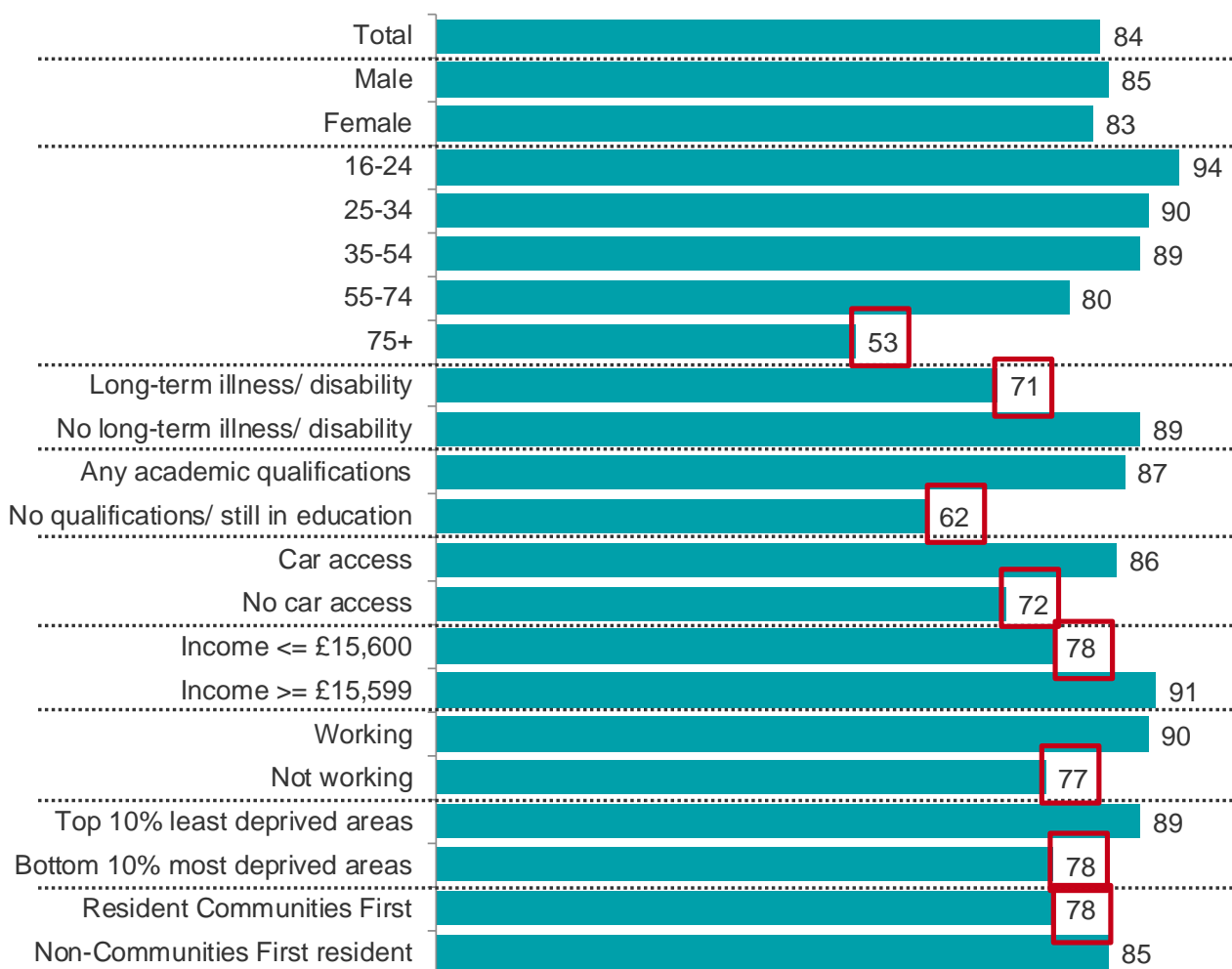
Figure 2.2 overleaf shows the proportions who had taken visit in the last 4 weeks in 2014 by population group. As with the results relating to visits taken in the last 12 months, while there was no variation by gender, participation in the last 4 weeks did vary by age with those aged 75 or over less likely than younger people to have taken visits (53% and 87% respectively).

Those with a long-term illness or disability were less likely to have visited the outdoors in the last 4 weeks than those without (71% and 89% respectively). Variations were also recorded with regards to transport access with 86% of those with access to a car having made a visit in the last 4 weeks compared to 72% of those without access to a car.

In 2014, levels of visit taking in the last 4 weeks were also lower amongst those living in the bottom 10% most deprived areas (78% took visits), those not in paid employment (77%), those with a household income of under £15,600 per year (78%) and those resident in Communities First areas (78%).

Figure 2.2 Visits taken in last 4 weeks by demographic group (2014, %)

Base: All respondents (2014 – 5,995)



Figures inside a red box square are significantly lower than the total e.g. 53% of non-visitors were aged 75+ had taken a visit in the last 4 weeks compared to 84% overall

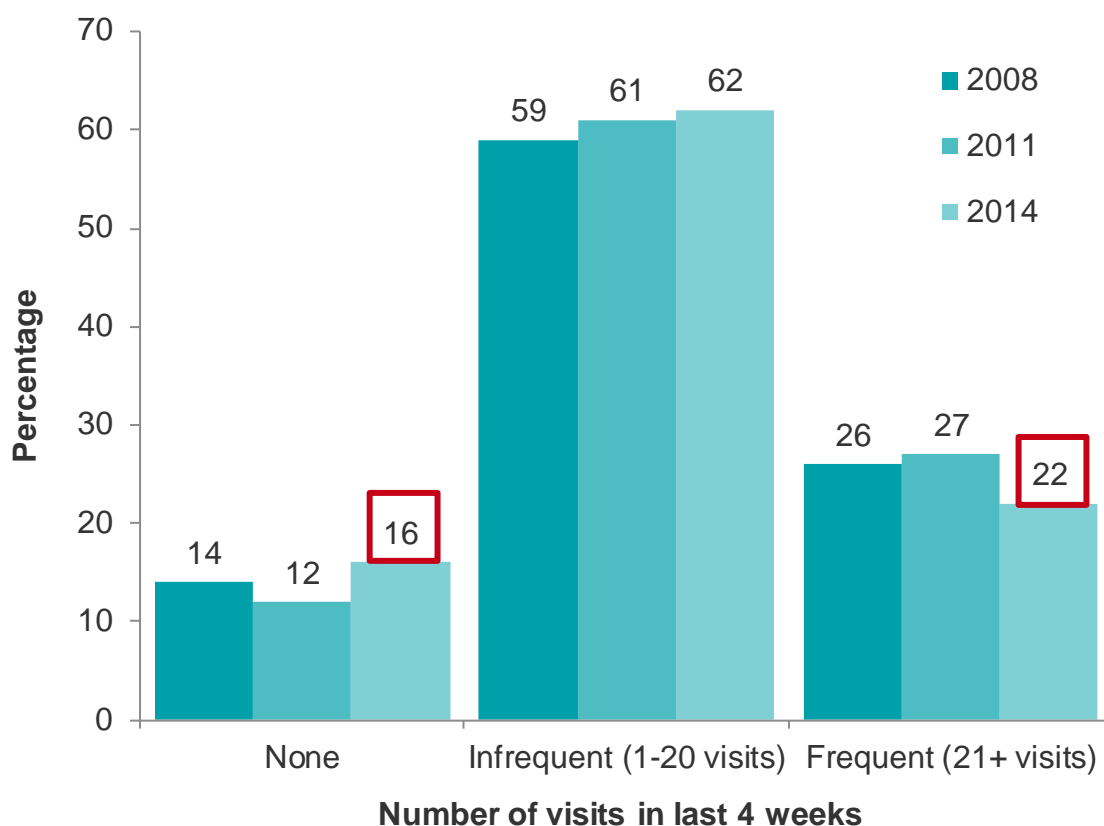
Frequency of visits in last 4 weeks

The chart below illustrates the frequency with which outdoor visits were taken amongst the adult population in Wales. The proportion of the population that had taken a visit in the last 4 weeks decreased from 88% in 2011 to 84% in 2014. The decrease between the two most recent surveys can be seen in the proportion of frequent visitors, that is those who had taken 21 or more visits in the last 4 weeks – 22% in 2014 compared to 27% in 2011.

As shown later in this report, decreases were also been recorded in 2014 for visits taken within a mile of the start point and shorter visits of less than an hour induration

Figure 2.3 Frequency of outdoor visits in last 4 weeks (2008, 2011, 2014 %)

Base: All respondents (2008 – 6,045; 2011 – 6,393; 2014 – 5,995)



Note: Percentages equal may more or less than 100% due to rounding.

Figures inside a red box square are significantly lower in 2014 than in 2011 than in 2014 e.g. 16% the population had not taken a visit in the last 4 weeks compared to 12% in 2011

* = <0.5%

Table 2.1 (overleaf) examines the visitor profiles of non-visitors, infrequent and frequent visitors for several demographic groups where significant variations were recorded.

Table 2.1 Frequency of outdoor visits in last 4 weeks (2014 %)

Base: All respondents (2014 – 5,995; Non-visitors – 1,054; Infrequent visitors – 3,593; Frequent visitors – 1,348)

	Total	Non-visitors	Infrequent (1-20 visits in last 4 weeks)	Frequent (21+ visits in last 4 weeks)
16-24	15	5	16	19
25-34	14	8	15	14
35-44	16	10	17	18
45-54	17	13	18	16
55-64	16	17	16	15
65-74	12	17	11	12
75+	10	29	6	7
Car access	84	71	86	85
No car access	16	29	14	15
Limiting illness/ disability	28	52	23	25
No illness/ disability	72	48	77	75
Children in household	24	10	27	26
No children in household	76	90	73	74
Own/ care for a dog	36	21	32	59
Do not own/ care for a dog	64	79	68	41

Figures inside a green square are significantly higher than other sub-groups within that classification and from the total e.g. 29% of non-visitors were aged 75+ compared to 10% amongst the total sample, 6% of infrequent visitors and 7% of frequent visitors

As shown above, the demographic profiles of infrequent and frequent visitors were largely the same. The key exception was dog ownership, with 59% of frequent visitors indicating that they own or care for a dog compared to 32% of infrequent visitors.

The profile of non-visitors (those who had not taken a visit in the last 4 weeks) showed several demographic variations. Those in this group were more likely than the average to be aged 75 and over (29% of non-visitors), not to have access to a car (29%), to have a long-term limiting illness or disability (52%) and/or to live in households where there were no children aged 16 and under (90%).

2.2 Types of activities undertaken on visits

Visits in last 12 months

As shown in Figure 2.4 (overleaf), the most frequently undertaken activity in 2014 during visits to the outdoors in the last 12 months was walking (85%), as it was in previous years. This activity was particularly likely to be undertaken by people who had children in the household (93%), dog owners (90%) and those in paid employment (92%).

Seven out of ten respondents had undertaken sightseeing or visiting an attraction on a visit to the outdoors in the last 12 months in 2014 (70%). Those more likely than the average to have undertaken this activity included those with a household income of £15,600 or more (80%), those with children in the household (84%), those aged 25-54 (78%), those in paid employment (78%), carers (74%) and those with access to a car (74%).

Just under half of respondents had visited a children's playground or other outdoor play areas in 2014 (46%). Women (53%), and/or a car (48%), dog owners (51%), those without a disability (51%) and those in paid employment (52%) were more likely to have undertaken this activity.

Picnicking was also undertaken by around 4 in 10 respondents in 2014 (44%, lower than in 2011 - 49%). The groups more likely than the average to have undertaken this activity included those with children in the household (69%), those in paid employment (52%), women (51%), dog owners (49%) and those with access to a car (48%).

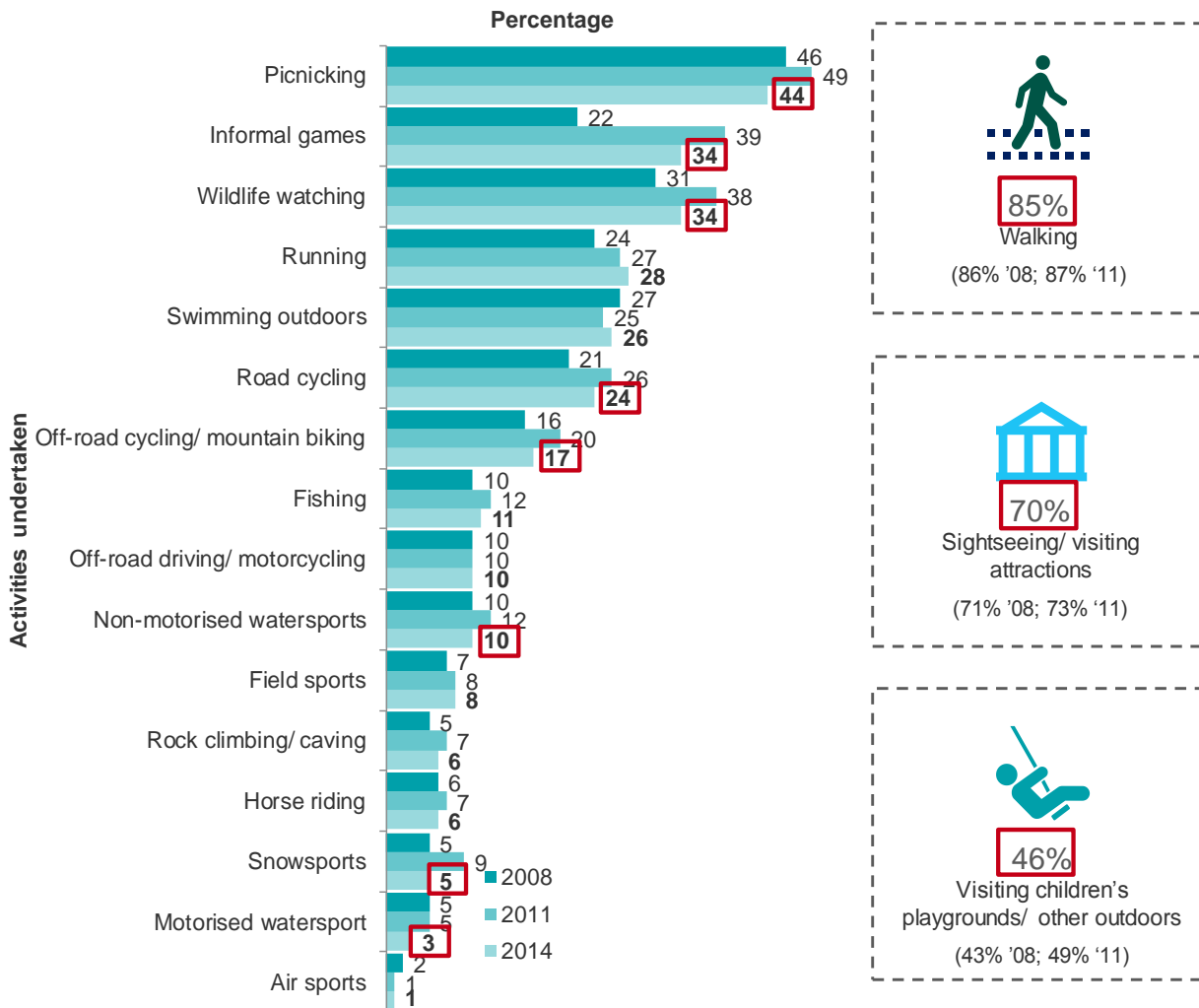
In terms of the more active pursuits, the highest levels of participation were recorded for running (28%), outdoor swimming (26%), road cycling (24%) and off-road cycling (17%).

The proportions that undertaking the majority of activities have varied over the years, some increasing then decreasing with no clear pattern of activity. However, when looking at participation in running on visits taken in the last 12 months, an overall increase from 24% in 2008 to 28% in 2014 has been recorded. As shown later, an increase in running was also recorded for visits taken in the last 4 weeks.

Figure 2.4 Activities undertaken outdoors in last 12 months (2008, 2011, 2014, %)

Base: All respondents (2008 – 6,045; 2011 – 6,393; 2014 – 5,995)

Note: multiple responses possible per respondent



Figures inside a red box are significantly lower compared to the 2011 figure

Visits in last 4 weeks

As in previous years, those who had taken any visits in the last 12 months were asked to specify any activities undertaken during outdoor visits taken in the 4 weeks prior to interview (as shown in Figure 2.5 overleaf).

Walking continued to be the most frequently undertaken activity during this time period (83% in 2014). Those more likely to have undertaken this activity in the last 4 weeks included those aged 16-24 (91%), those qualified at degree level or above (89%), those with a dog (88%), those with children in the household (86%) and those with access to a car (84%).

Just under half of those who had taken a visit to the outdoors in the last four weeks had taken part in sightseeing or visiting an attraction in 2014 (43%). This activity was more likely than average to have been undertaken by those with children in the household (56%), those with an income of £31,200 or above (55%), those educated to degree level or above (53%), 25-54 year olds (49%), those in paid employment (47%), those with access to a car (46%) and women (46%).

A little over a third of those who had visited the outdoors in the last 4 weeks in 2014 had taken children to a playground or other outdoor play area (35%). This activity was more likely to have been undertaken by those with children in the household (65%), 25-54 year olds (44%), women (40%), those in paid employment (39%) and those with no long-term illness or disability (37%).

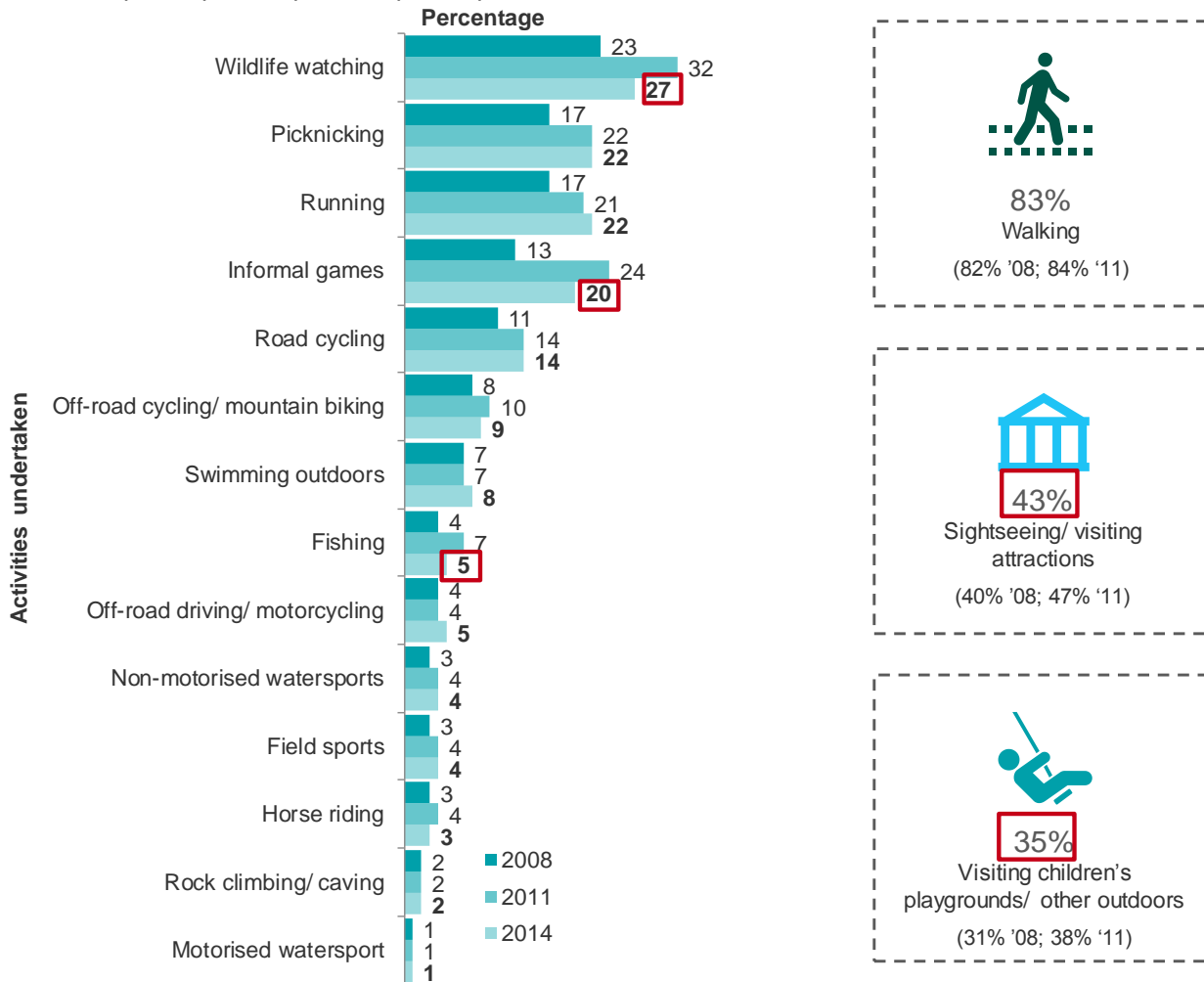
The proportions undertaking most of the activities shown in the figure overleaf have remained relatively consistent over the years. Overall increases have been recorded, however, for road cycling (from 11% in 2008 to 14% in 2014), running and picnicking (17% to 22% for the latter two).

Those who had visited the outdoors at all in the last 4 weeks had undertaken an average of 3 of the activities listed during that period, an equal proportion to 2008 (3) but slightly lower than in 2011 (4).

Figure 2.5 Activities undertaken outdoors in last 4 weeks (2008, 2011, 2014, %)

Base: All who had taken a visit in the last 12 months (2008 – 5,732; 2011 – 6,034; 2014 – 5,489)

Note: multiple responses possible per respondent



Figures inside a red box are significantly lower compared to the 2011 figure

2.3 Types of places

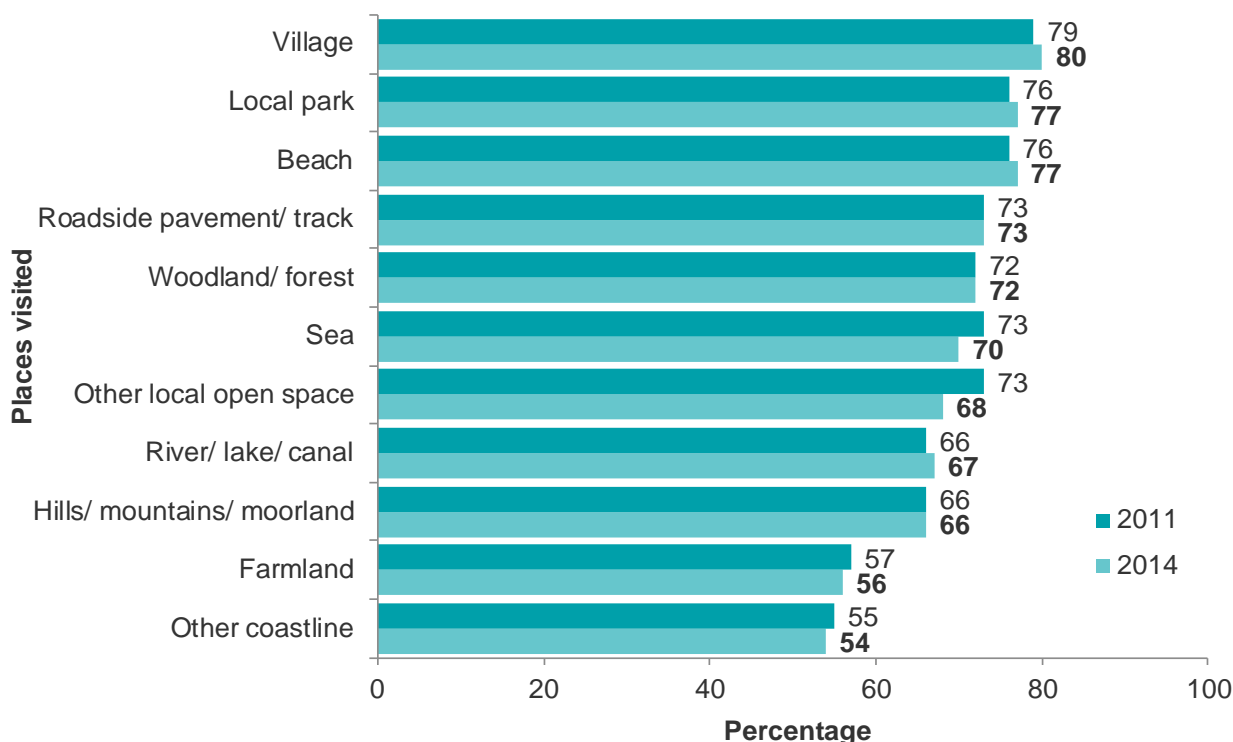
Visits in last 12 months

Those who had taken a visit to the outdoors in the last 12 months were asked to provide details of all of the types of places they had visited, as shown in Figure 2.6 below. Respondents could select more than one type of place. This question was not asked in 2008, therefore, comparisons are made between 2011 and 2014.

Figure 2.6 Places visited in last 12 months (2011, 2014, %)

Base: All who undertook an activity on an outdoor visit in last 12 months (2011 – 6,034; 2014 – 5,489)

Note: multiple responses possible per respondent



Figures inside a red box are significantly lower compared to the 2011 figure

As shown above, during 2014, four-fifths of those who had visited the outdoors in the last 12 months had been to a village (80%), with those with an income of £31,200 or above (87%), those with a HE degree or above (87%), those with children in the household (86%) and those aged 25-34 (86%) more likely to have visited this type of location.

Overall, 77% had visited a local park in the last 12 months with a higher proportion of those with children (91%), those with an income of £31,200 or more (83%), those whose main activity was running (89%), those under the age of 54 (82%), and women (80%) visiting this type of place.

Beaches were also visited by around three-quarters of respondents in 2014 (77%) with those with a household income of £31,200 or above (87%), those with children (85%),

those aged 25-54 (83%) and those in paid employment (83%) more likely to have visited this type of destination in the last 12 months.

Most of the other types of place asked about had also been visited by more than two-thirds of the population during the last 12 months in 2014 including 73% visiting roadside pavements/ tracks and 72% visiting woodland or forests.

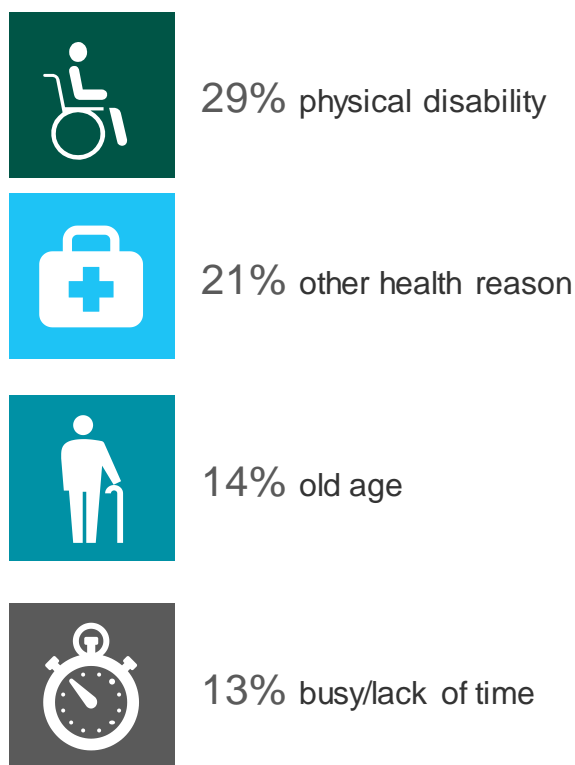
2.4 Barriers to participation

Figure 2.7 below highlights the most frequently cited reasons for not visiting the outdoors given by those who had not done so in the last 12 months.

Figure 2.7 Main barriers to participation – last 12 months (2008, 2011, 2014, %)

Base: Those who have not visited the outdoors in last 12 months (2014 – 506)

Note: multiple responses possible per respondent



3 in 10 non-participants mentioned a physical disability while 21% mentioned another health reason and 14% cited old age as a reason for not visiting the outdoors in 2014. Physical disability was seen as more prohibitive amongst non-visitors than other barriers, with a smaller proportion mentioning a lack of time (13%).

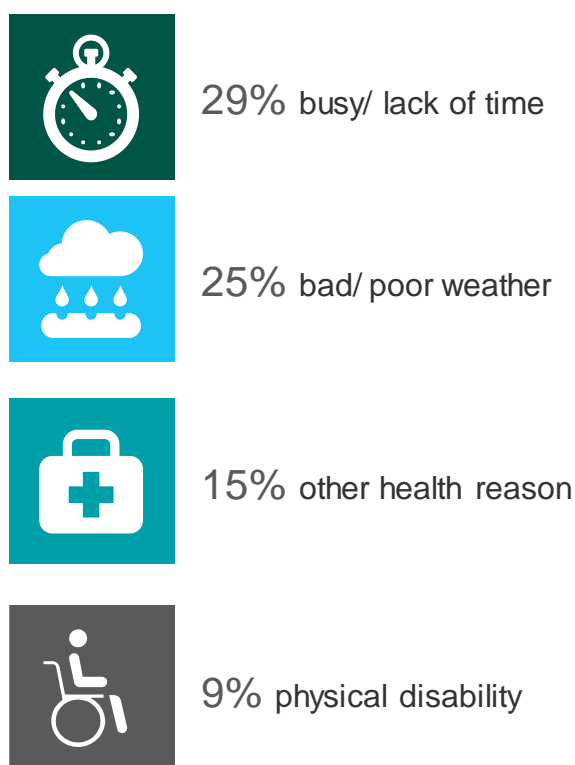
There were no significant variations compared to previous years.

Figure 2.8 below shows the most frequently cited reasons given for not visiting the outdoors in the last 4 weeks.

Figure 2.8 Main barriers to participation – last 4 weeks (2008, 2011, 2014, %)

Base: Those who have not visited the outdoors in last 4 weeks (2014 – 548)

Note: multiple responses possible per respondent



It is interesting to note the shift in the prominence of various barriers when asked of those who had not taken a visit recently (i.e. in the last 4 weeks) compared to those who had not visited for a longer period.

In 2011 and 2014, a lack of time was the obstacle most often mentioned in relation to taking visits in the last 4 weeks (29% in 2014), mentioned much more frequently than for a lack of visits in the last 12 months (13%). Likewise, weather conditions had a greater impact on propensity to visit in the last 4 weeks, with a quarter citing this as a reason for not visiting during this period in 2014 (25%). Physical disability, health considerations and old age were less prominent barriers when considering reasons for not visiting in the last 4 weeks.

There were no statistically significant differences between the barriers reported in each of the survey years.

In 2014, there were variations in the barriers to taking visits in the last 4 weeks provided by different sub-groups within the population including the following:

- Too busy/ lack of time (29% overall) – more likely to be mentioned by those in paid employment (57%) and those aged 25-54 (47%).
- Physical disability (9% overall) – more likely to be mentioned by those aged 55 and over (15%), those with a household income up to £15,599 (15%) and those who were not working (14%).
- Other health reason (15% overall) – more likely to be mentioned by those aged 75 and over (20%), those not in paid employment (21%) and those with a household income up to £15,599 (23%).



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Section 3: Visits to the Outdoors

Those who had visited the outdoors in the last 4 weeks were asked for further details about their most recent visit. This section focuses on the characteristics of these visits by looking at what people do, where they go, who they go with and why they choose to visit the outdoors, as well as expenditure and the health benefits of visiting the outdoors.

Results have been weighted so that they are representative of the visits taken by the Welsh adult population during the survey period. **Please note that these figures should be quoted as percentages of visits not of the population (see separate Technical report referenced earlier for more information).**

Key findings:

- While walking remained the most frequently undertaken main activity, a decrease was recorded when compared to 2011 (60% and 66% respectively).
- There has been a decrease in short duration visits, with the proportion of visits where the main activity was undertaken for less than an hour falling consistently over time - from 27% in 2008 to 23% in 2014. This corresponds with a decrease in the proportion of visits lasting less than an hour in total.
- The decrease in shorter visits was also accompanied by a decrease in visits close to home (taken within a mile of the visit start point), which decreased from 46% in 2011 to 38% in 2014.
- There was an increase in the proportion of visits involving a party of 4 or more people recorded in 2014, with these visits more likely to be taken by infrequent visitors (those who visited 20 times or less in the last 4 weeks).
- Health or exercise was the most frequently cited motivation for visiting the outdoors (23%), closely followed by exercising a dog (22%). Visits taken for health or exercise were more likely than the average to be under 3 hours in duration, however, the visit destinations were more varied, including both local destinations and some that require a greater amount of travel (e.g. hills/ mountains/ moorland).
- Visits involving any spend were more likely to be taken to destinations selected by infrequent visitors and those more likely to be included in visits lasting for 3 hours or more, in particular, the beach and the sea. Levels of spend were also higher on visits where the main activities were sightseeing/ visiting attractions, picnicking, visiting children's playgrounds/ other outdoor areas or informal games.

3.1 What activities do people do?

Figure 3.1 overleaf shows the proportions of visits including each of the activities asked about in the survey, regardless of whether or not this was the main activity done during the visit.

The popularity of walking during an outdoor visit was evident in all three surveys, with around seven in ten outdoor visits including this activity in each survey year (71% in 2014). Other activities undertaken in a smaller proportion of visits in 2014 included wildlife watching (12%), taking children to playgrounds or other outdoor play areas (12%) and sightseeing or visiting an attraction (10%).

Looking in more detail at the visits involving walking, these were more likely to be undertaken by those who were retired (91%), those aged 55+ (80%), those with a household income of less than £16,000 a year (79%), those in the 10% most deprived areas (78%) and/or those who owned a dog (78%).

Main activity

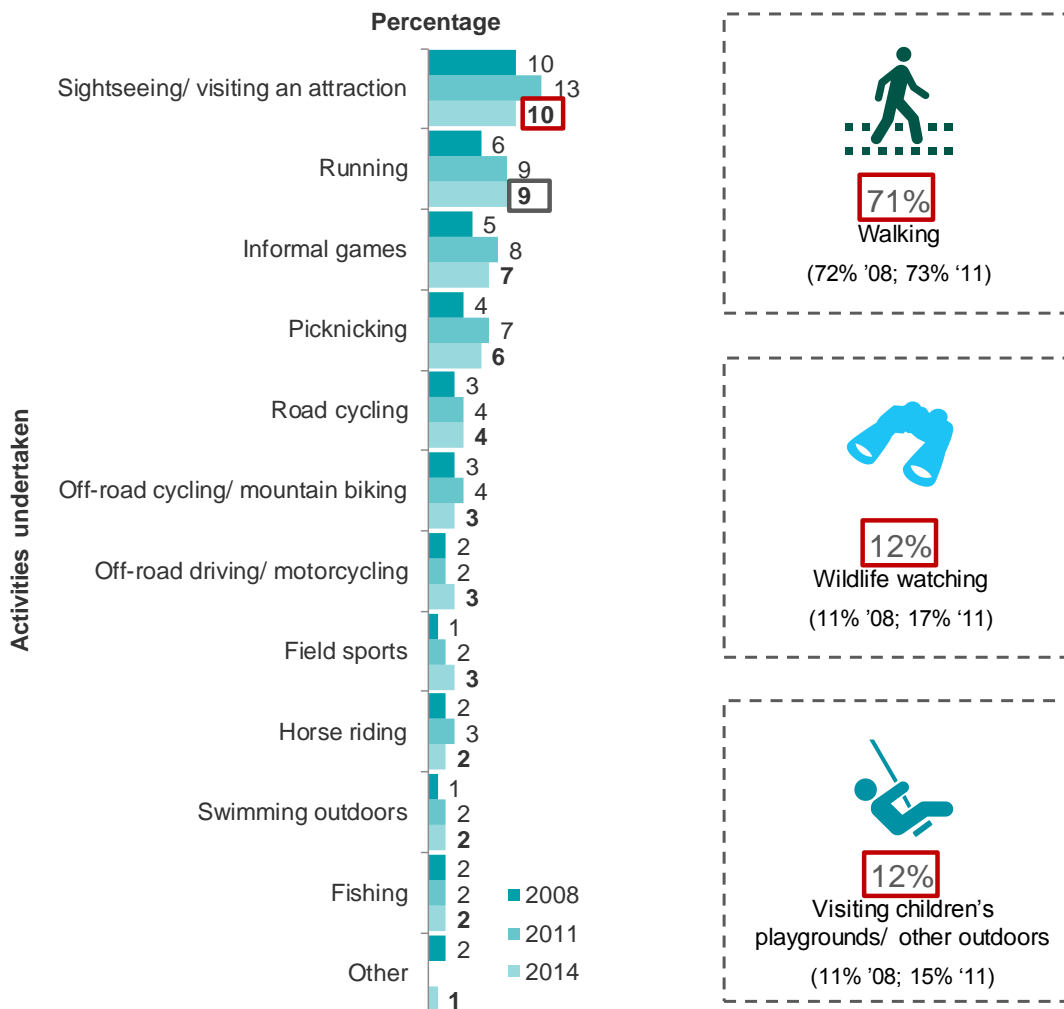
Those who had visited the outdoors in the last 4 weeks were also asked to specify the single *main* activity they had undertaken on their most recent visit (see Figure 3.2 on page 36). While walking was the single main activity on 6 in 10 visits (60%) this was a lower proportion than recorded in previous years, with 66% of visits involving this as the main activity in 2011.

8% of visits involved as the main activity going to a children's playgrounds or other outdoor play areas, a figure which has remained consistent in each survey year. Other main activities included running (6%), sightseeing / visiting an attraction (4%) or informal games (4%).

Figure 3.1 All activities undertaken in the outdoors in last 4 weeks (2008, 2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)

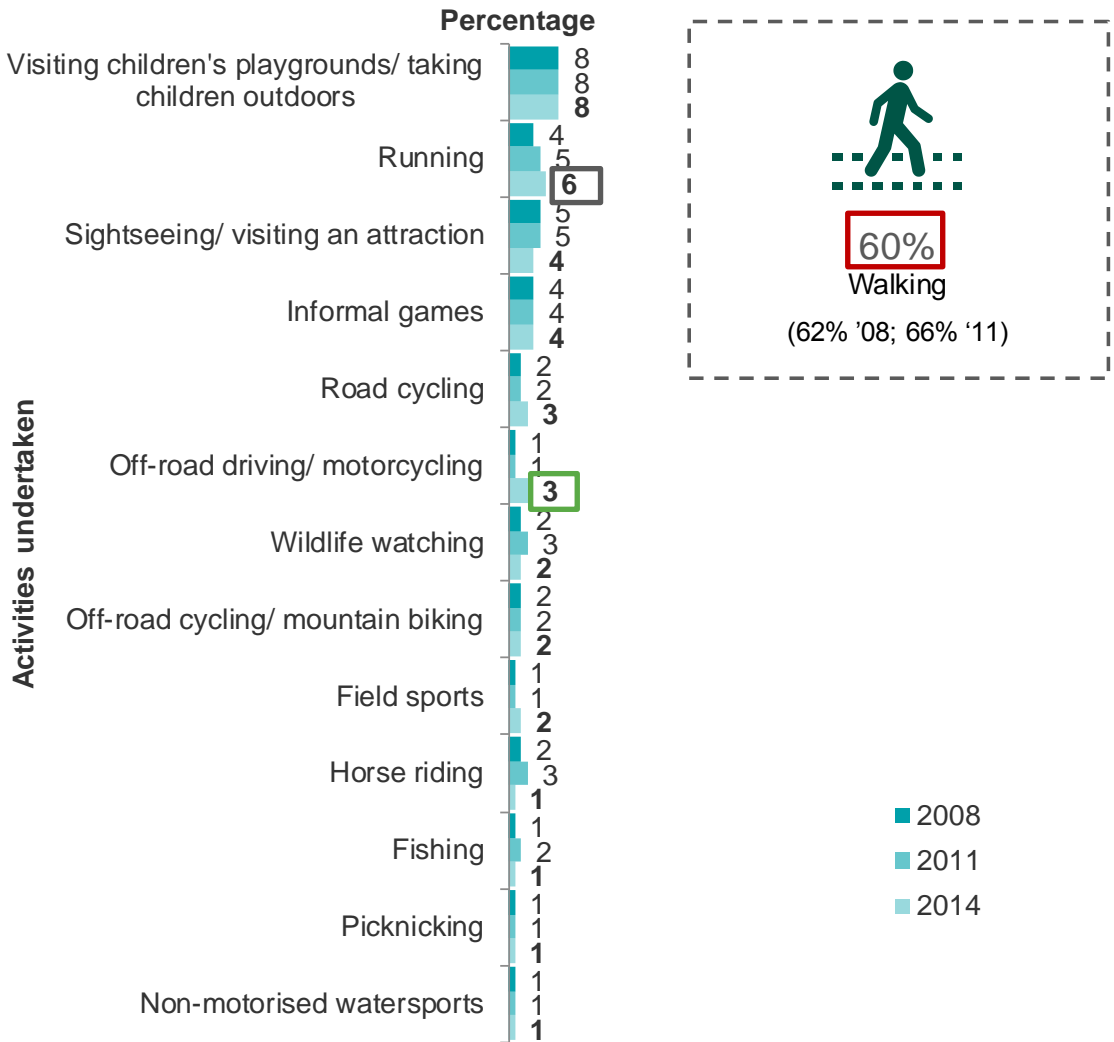
Note: multiple responses possible per respondent



Figures inside a red box are significantly lower compared to the 2011 figure. The grey box indicates a significant variation over time (2008-2014)

Figure 3.2 Main activity undertaken in the outdoors in last 4 weeks (2008, 2011, 2014)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)



Figures inside a red box are significantly lower and in a green box are significantly higher compared to the 2011 figure. The grey box indicates a significant variation over time (2008-2014)

Table 3.1 Main activities undertaken on most recent visit by gender and age (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)

	Total	Gender		Age				
		Male	Female	16 - 24	25 - 34	35 - 54	55 - 74	75+
Walking	60	54	67	49	42	62	74	75
Visiting children's playgrounds/ outdoor play areas	8	5	10	4	19	8	5	2
Running	6	7	5	12	14	5	1	-
Sightseeing/ visiting an attraction	4	3	5	3	3	4	5	4
Road cycling	3	5	1	1	8	2	2	2
Off-road driving/ motorcycling	3	5	*	6	6	1	*	*
Wildlife watching	2	3	2	*	1	3	4	4
Off-road cycling/ mountain biking	2	3	1	3	1	3	1	*
Field sports	2	4	*	4	-	1	1	8
Horse riding	1	*	2	1	1	2	1	-
Fishing	1	3	*	2	-	2	1	*
Non-motorised watersports	1	1	1	1	*	1	*	*
Picnicking	1	1	1	1	2	1	1	1

* = <0.5%; - = no response

Figures inside a green square/ rectangle are significantly higher than other sub-groups within that classification e.g. 67% of women who walked as a main activity is significantly higher than the proportion of men who did so (54%)

This comparison highlights that, in 2014, higher proportions of men took part in road cycling (5%), off-road driving/ motorcycling (5%), field sports (4%) and fishing (3%), while women were more likely to undertake walking (67%), visiting children's playgrounds (10%), sightseeing/ visiting an attraction (5%) and horse riding (2%).

When analysed by age, visits taken by those aged 55 and over were more likely to have included walking (74%) while the main activity on visits taken by those aged 34 and under was more likely to be running (13%).

Other variations in the main activities during visits in 2014 included the following:

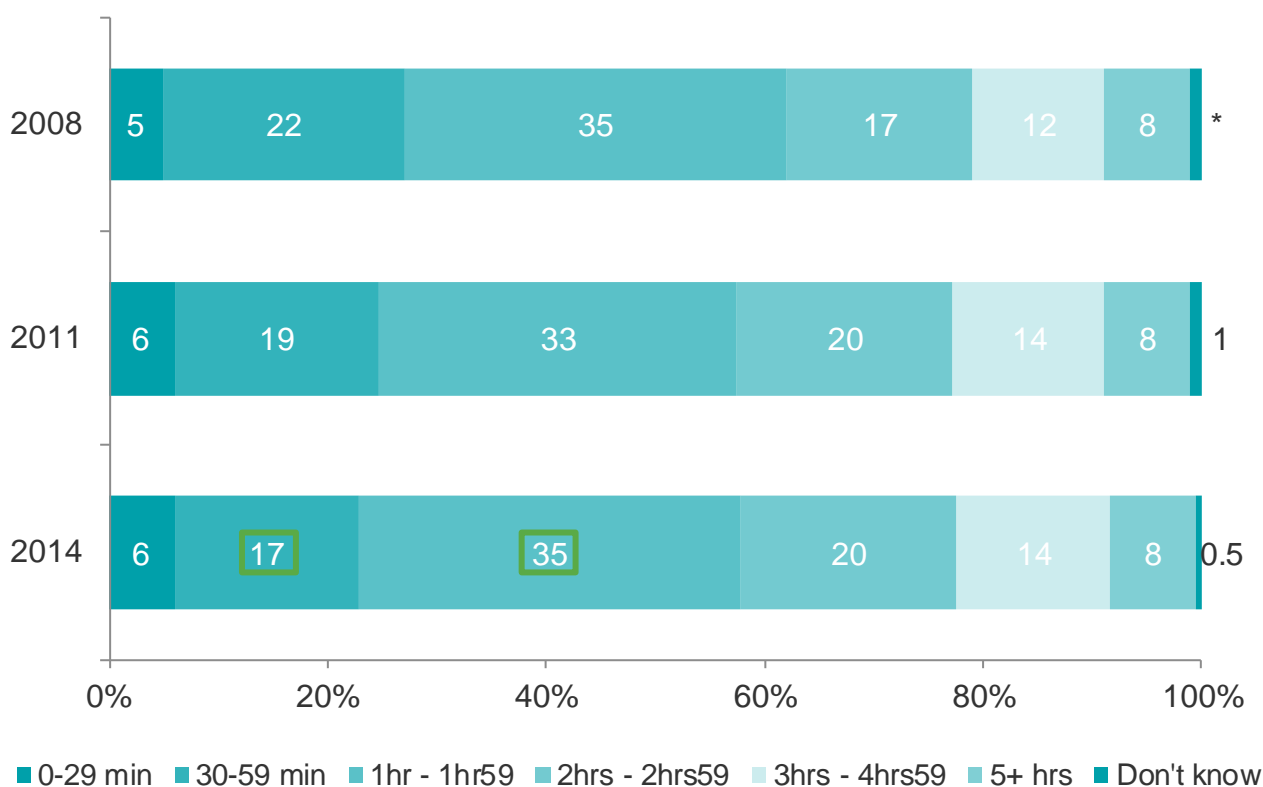
- *Working status* – visits by those not in paid employment were more likely to include walking as a main activity (65%), while visits by people in employment were more likely to include road cycling (4%) and/ or off-road cycling or mountain biking (2%).
- *Children* – the main activity on the visits taken by people with children in their household was more likely be visiting children’s playgrounds or other outdoor play areas (18%) whereas people without children in the household were more likely to go walking (66%).

Activity duration

Respondents were asked to specify the length of time spent undertaking their main activity on their most recent visit to the outdoors. As in previous years, over half of visits taken to the outdoors within the last 4 weeks involved less than 2 hours being spent on the main activity (58% in 2014), while a further two in ten visits involved between 2 hours and 2 hours 59 minutes undertaking the main activity (20%). The average amount of time spent undertaking the main activity in 2014 was 2 hours and 12 minutes (this was 2 hours and 4 minutes in 2011 and 2 hours and 38 minutes in 2008).

Figure 3.3 Duration undertaking main activity on most recent visit (2008, 2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)



* = <0.5%

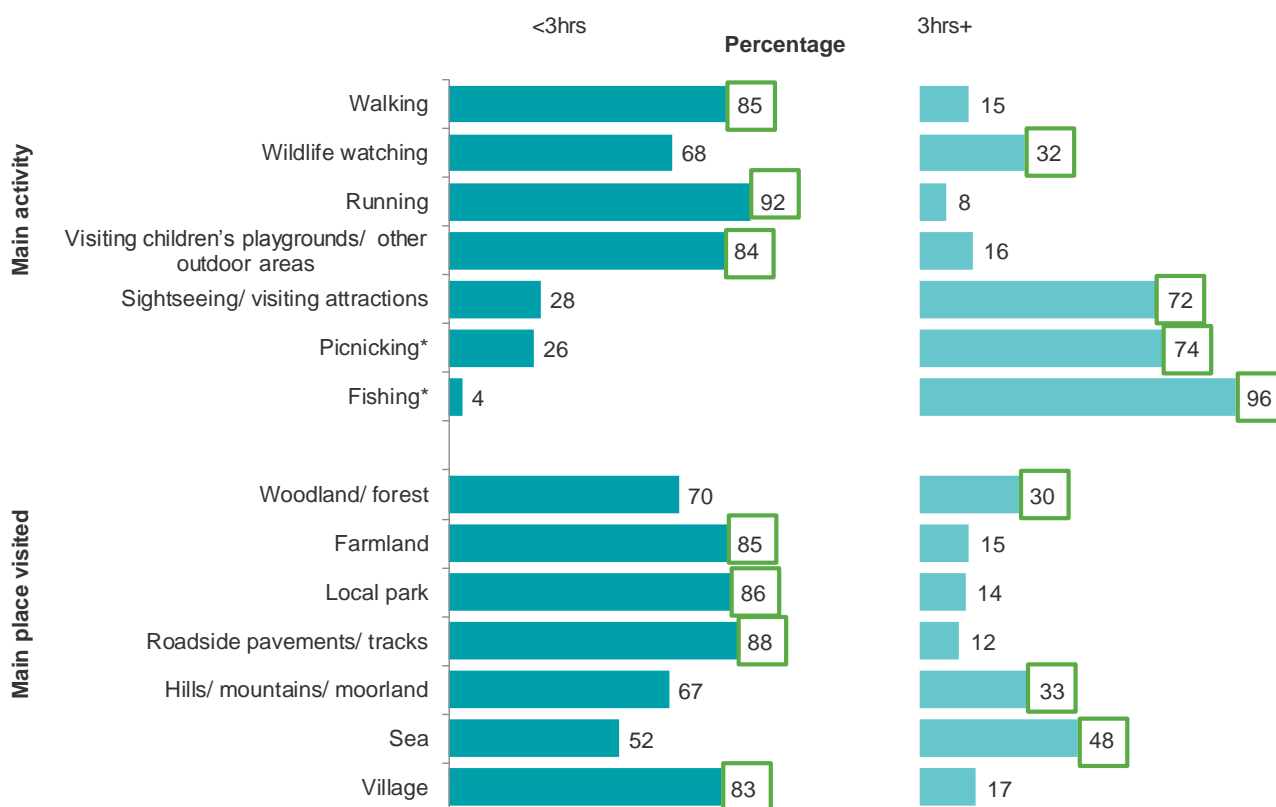
The proportion of visits where the main activity was undertaken for less than an hour has fallen consistently over time - from 27% in 2008 to 23% in 2014. In 2014, visits taken by those with no car access, people aged 75 and over, those with a long-term illness or

disability and those with no academic qualifications were more likely to involve a time period of less than an hour undertaking the activity (35%, 34%, 32% and 29% respectively). In addition, 28% of visits where walking was the main activity involved less than an hour being spent on this activity.

As shown in Figure 3.4 below, variations in the amount of time spent undertaking the main activity can be seen by the activity itself and by the type of place visited.

Figure 3.4 Variations in main activity duration by main activity and place visited (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)



Figures inside a green square/ rectangle are significantly higher than the total e.g. 85% of visits where walking as a main activity involved that activity being undertaken for less than 3 hours compared to 78% of all visits where the main activity was undertaken for this duration

* Caution small base - picnicking (89); fishing (52)

Visits where walking (85%), visiting children's playgrounds/ other outdoor areas (84%) or running (92%) were the main activities were more likely than the average to involve less than 3 hours being spent on these activities. Visits where the main activity was more likely to be undertaken for 3 hours or more were more likely than the average to include fishing (96%, caution small sample), picnicking (74%, caution small sample), sightseeing/ visiting attractions (72%) or wildlife watching (32%) as the main activities undertaken.

The main activity was more likely than the average to be undertaken for less than 3 hours on visits where roadside pavements/ tracks (88%), local parks (86%), farmland (85%) or villages (83%) were the main destinations. Longer participation in the main activity (3

hours or more) was more likely on visits taken to the sea (48%), hills/ mountains/ moorland (33%) and those taken to woodlands/ forests (30%).

Visits taken by those with no access to a car (85%), women (84%) and those not in paid employment (81%) were more likely than the average to have involved participation in the main activity of less than 3 hours in duration. Those taken by men (28%) and those in paid employment (25%) were more likely than the average to have involved the main activity being undertaken for 3 hours or more.

3.2 Where do people go?

Main destination

Respondents were also asked which of the types of locations visited was their single main destination on their most recent visit, as shown in Figure 3.5 overleaf. In this context, the largest proportions of visits had a local park as their main destination in 2014 (16%), followed by woodlands/ forests (15%), roadside pavement/ tracks (13%) and farmland (11%).

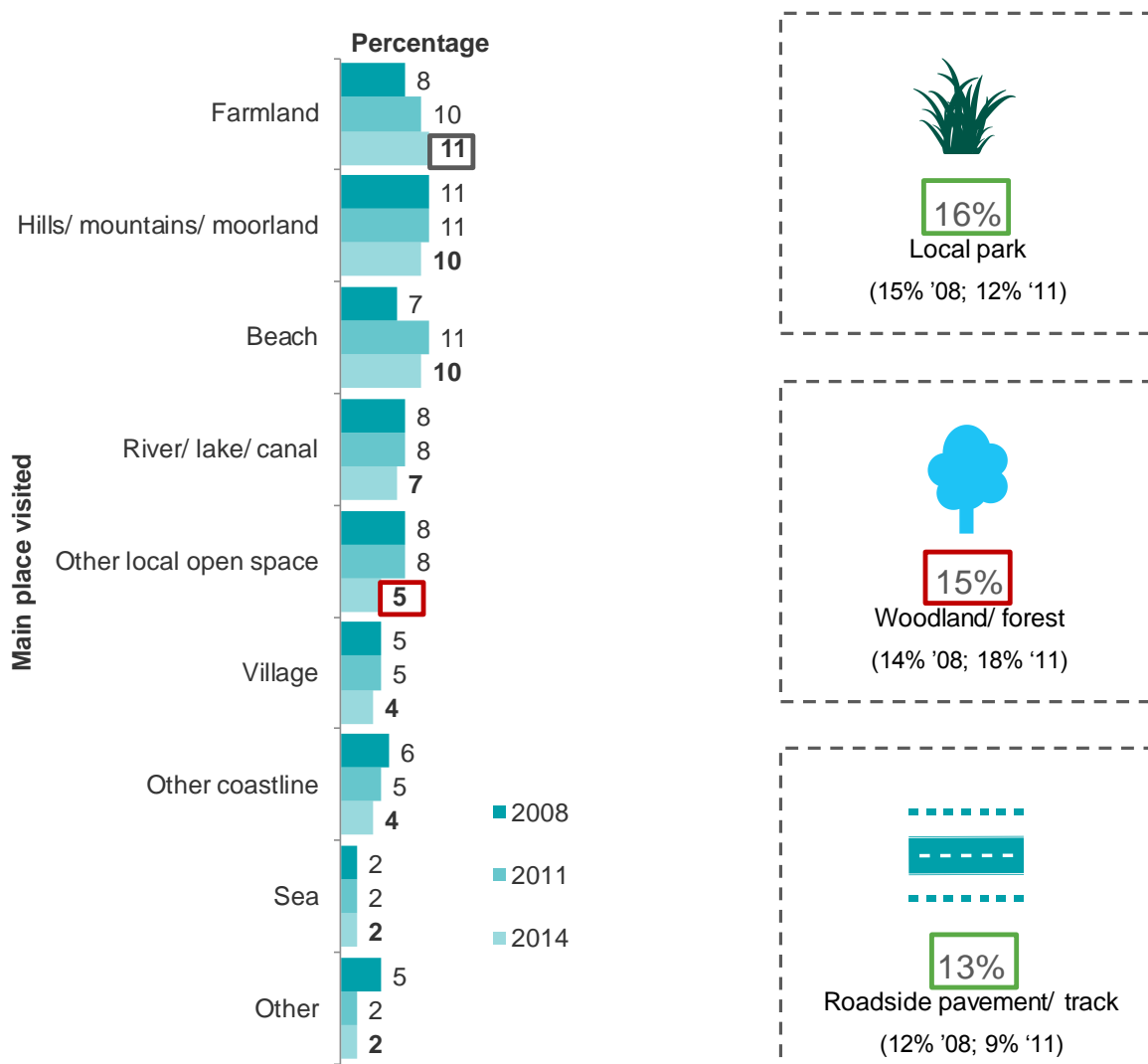
Between 2011 and 2014, there were increases in the proportions of visits with a local park (12% in 2011 and 16% in 2014) or roadside pavements and tracks (9% and 13% respectively) as the main destination but decreases in the proportions of visits where woodlands/ forests (18% to 15%) and other local spaces (8% and 5%) were the main destinations visited.

Comparing the main destination on visits taken by different population groups, variations in 2014 included the following:

- *Local park (16% overall)* – more likely to be the main destination on visits taken by those living in South East Wales (23%), residents of Communities First areas (22%), 16-34 year olds (20%), and those without a car (20%);
- *Woodland/ forest (15% overall)* – more likely to have been the main destination on visits taken by 16-24 year olds (21%) and dog owners (19%).

Figure 3.5 Main destination visited on most recent visit (2008, 2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)



Figures inside a red box are significantly lower and in a green box are significantly higher compared to the 2011 figure. The grey box indicates a significant variation over time (2008-2014)

Further analysis regarding the main types of place visited according to the main activities undertaken illustrates a number of statistically significant variations (note that sample size limitations mean that statistically significant variations can only be identified for the higher participation activities). Most notably visits where the main activity was:

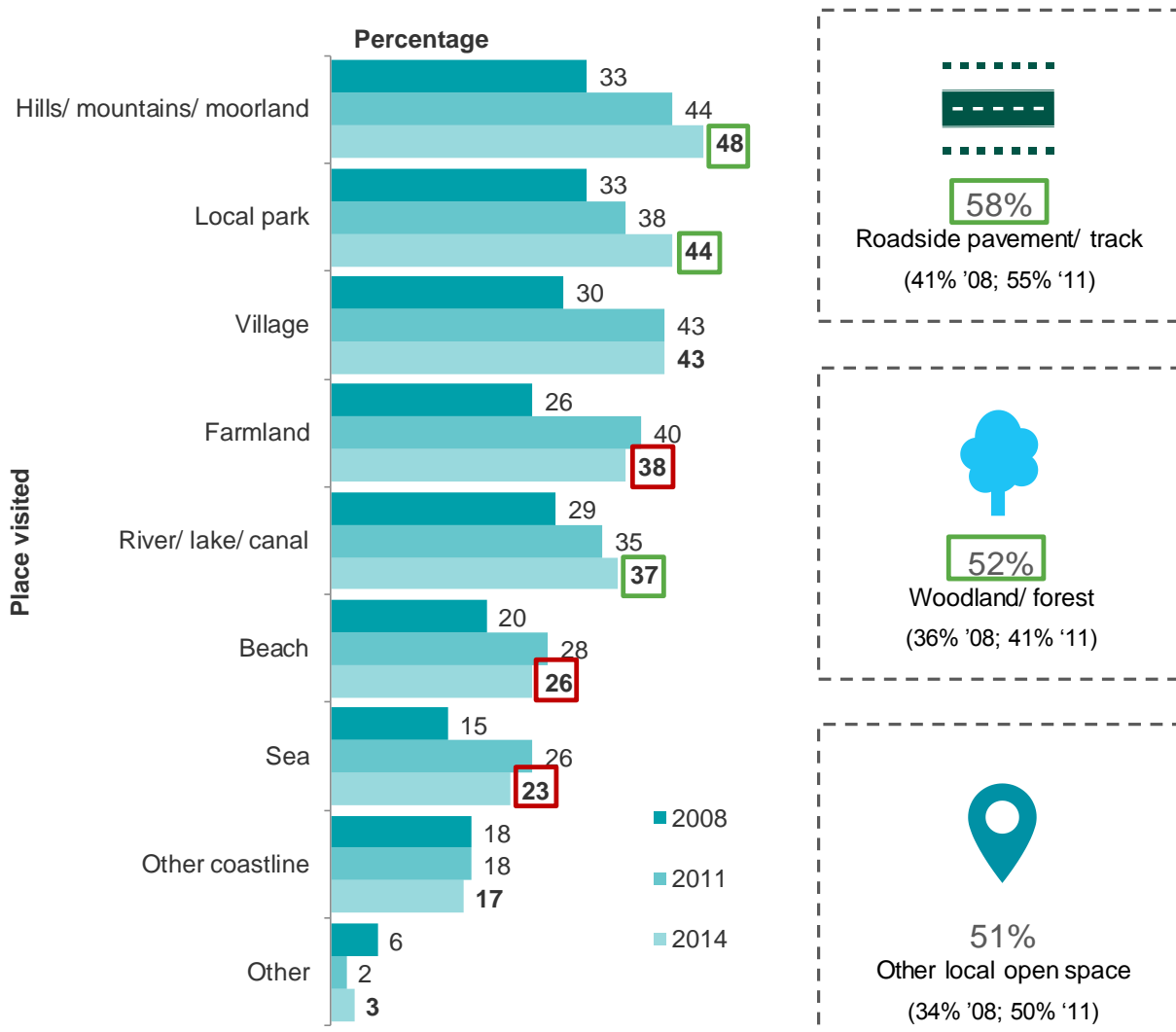
- *Wildlife watching* - more likely than the overall average to have woodland or forest as the main destination visited (26% compared to 15% respectively);
- *Running* - more likely than the overall average to have been taken on roadside pavements or tracks (24% v 13%) or in mountain/hill or moorland destinations (24% versus 10%).

All destinations visited

Respondents were also asked to specify all of the type of places included in their most recent visit to the outdoors. Figure 3.6 below shows the full range of locations included in all visits taken.

Figures 3.6 All destination visited on most recent outdoor visit (2008, 2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)



Figures inside a red box are significantly lower and in a green box are significantly higher compared to the 2011 figure.

As in 2011, the most frequently visited location in 2014 was a roadside pavement or track (58% of visits). This type of place was more likely to be included on visits taken by residents of bottom 10% most deprived areas (65%), those living in South East Wales (62%) and women (61%).

In 2014, 52% of outdoor visits included time spent in a woodland. This type of location was more likely to be included in the visits taken by those aged 16-24 (57%), those living in North Wales (56%), dog owners (56%), those who were employed (56%) and men (56%).

An 'other local open space' featured on 51% of all visits, with a higher than average proportion of the visits taken by those aged 25-34 (56%) including this type of place.

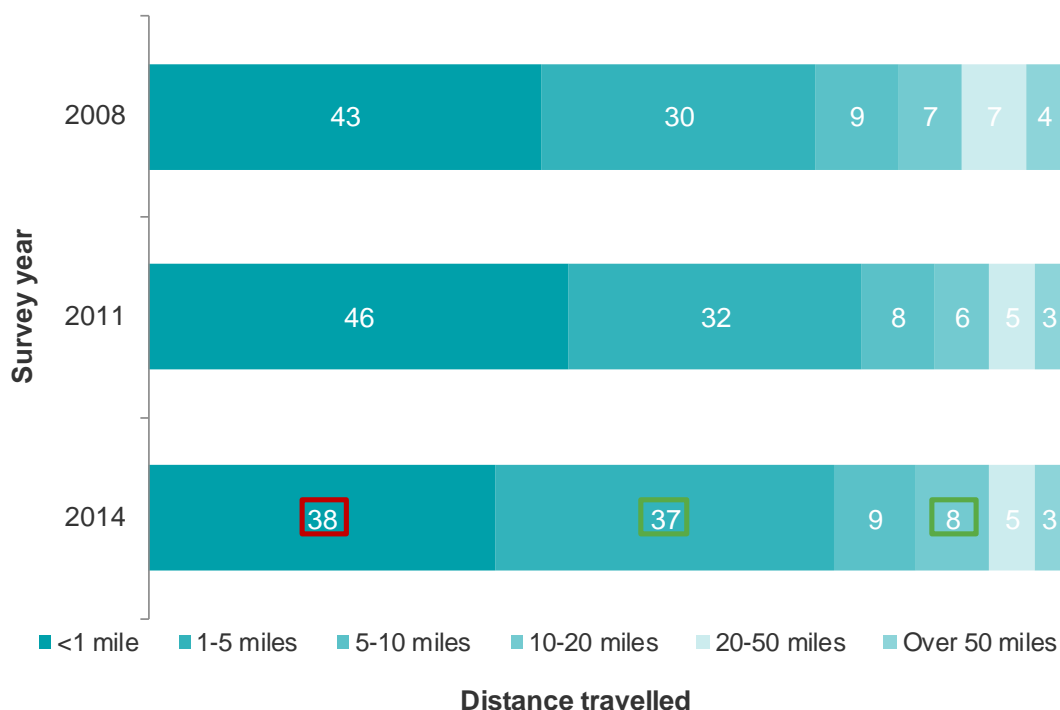
Comparing the profile of types of place included in visits between 2008 and 2011 respondents were generally seen to have included a wider range of types of place in their visits resulting in increased proportions for nearly every destination category. In 2014, the range of types of places has remained largely the same as in 2011.

Visit details

Those who visited the outdoors in the last 4 weeks were asked to estimate the distance travelled to their main destination (one way rather than total distance travelled), as shown in Figure 3.7 below.

Figure 3.7 Distance travelled on most recent visit (2008, 2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)



Figures inside a red box are significantly lower and in a green box are significantly higher compared to the 2011 figure.

Visits in 2014 were less likely than in previous years to have been taken within a mile of the visit start point, be it a person's home, workplace or holiday accommodation. 38% of visits in 2014 were taken within a mile compared to 46% in 2011, while 37% of 2014 visits were taken within 1 to 5 miles of the visit start point compared to 32% in the previous survey.

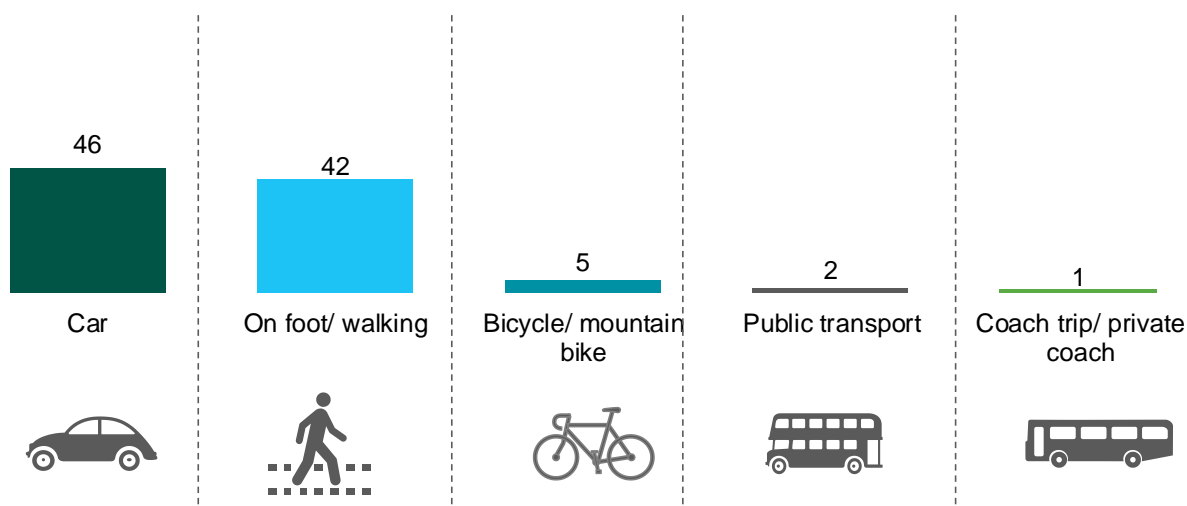
It is interesting to note that both a decrease in visits taken close to home and a decrease in frequent visits levels (21 or more visits in the last 4 weeks) were recorded in 2014.

In 2014, visits more likely to be taken within a mile of the start point included those taken by people who were retired (30%), carers (30%), those with a household income up to £15,599 (29%), those living in South East Wales (28%), those who were unemployed (28%) and those with no car access (28%).

Figure 3.8 below shows the main modes of transport used on visits to the outdoors in 2014. While just under half of visits in 2014 involved the use of a car (46%), around two in five involved walking (42%). Smaller proportions of visits included a bicycle or mountain bike (5%) and use of public transport (2%).

Figure 3.8 Main mode of transport on most recent visit (2014 %)

Base: Those who have visited the outdoors in last 4 weeks and travelled 0.5 miles or more (2014 – 4,258)



In 2014, visits taken by those living in Central & South West Wales (52%), those in paid employment (52%), those aged 35-54 (52%) and those with children in the household (52%) were more likely to have involved a journey by car. Walking was the main mode of transport on a higher proportion of the visits taken by those resident in Communities First areas (53%), those aged 16-24 (52%), those not in paid employment (51%) and those living in South East Wales (50%).

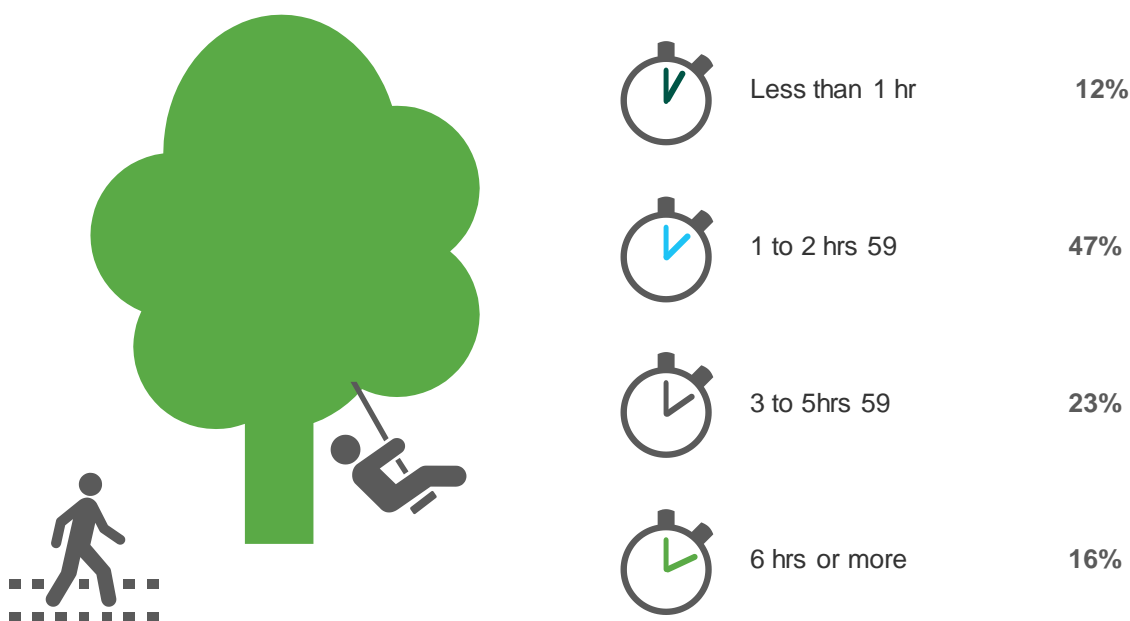
As well as recording the time spent undertaking their main activity (see Figure 3.3), those who visited the outdoors in the last 4 weeks were asked how long their most recent visit lasted in total, as shown in Figure 3.9 overleaf.

Almost half of visits in 2014 were between 1 hour and 2 hours 59 minutes in duration (47%), while a further quarter (23%) lasted for between 3hrs and 5 hours 59 minutes. Around one in ten visits lasted for less than 1 hour (12%), a lower proportion than in previous years and in keeping with decreases in visits within 1 mile of the start point and a decrease in frequent visit levels (21+ visits in the last 4 weeks).

The total visit duration average has fallen over time, with an average of 4 hours and 24 minutes in 2014 compared to 5 hours and 18 minutes in 2008.

Figure 3.9 Total duration of most recent visit (2014 %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)



* Percentages may equal more than 100% due to rounding

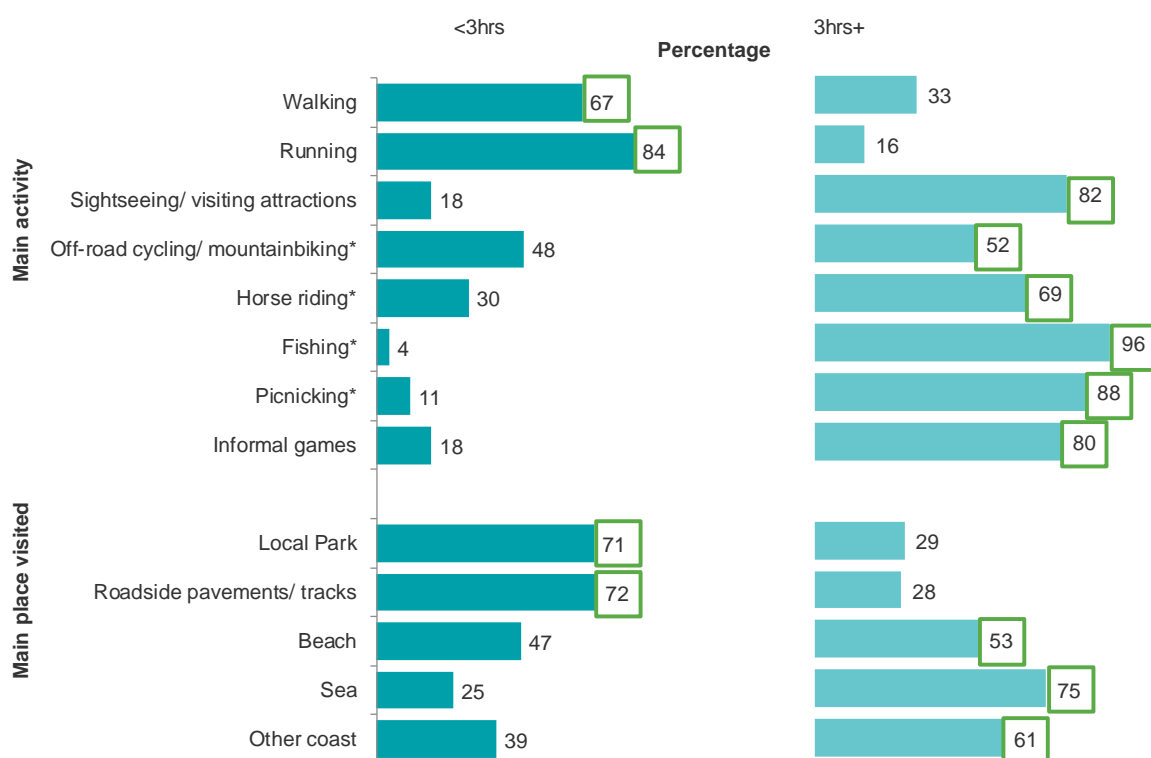
12% of all visits in 2014 lasted less than an hour, with shorter visits more likely to be taken by those with no academic qualifications (19%), those aged 75 and over (15%) and those not in paid employment (14%). It is interesting to note that for each of these groups, overall visit levels in the last 4 weeks were lower than those recorded in 2011.

As was the case for the duration of the main activity, variations in the duration of the total visit can be seen within the data.

As shown below, visits that involved walking (67%) or running (87%) as the main activity were more likely than the average to last less than 3 hours in total. Visits where off-road cycling/ mountain biking (52%), horse riding (69%), informal games (80%), picnicking (88%), sightseeing or visiting attractions (82%) or fishing (96%) were the main activity were more likely to be 3 hours or more in duration.

Figure 3.10 Variations in total visit duration by main activity and place visited (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)



Figures inside a green square/ rectangle are significantly higher than the total e.g. 67% of visits where walking as a main activity lasted for a total visit of less than 3 hours compared to 59% of all visits where the main activity was undertaken for this duration

*Caution, small samples – off-road cycling/ mountainbiking (81); horse riding (53); fishing (52); picnicking (89)

When analysed by destination, visits where local parks (71%) or roadside pavements/ tracks were the main places visited had higher than average proportions of visits of under 3 hours. Visits taken to beaches (53%), the sea (75%) or other coastal areas (61%) were more likely to be more than 3 hours in duration.

Variations were also apparent by demographic grouping with visits taken by women (63%) and dog owners (66%) more likely than the average to be less than 3 hours in duration while men (44%) and those who did not own a dog (47%) were more likely to take visits that were 3 hours or more in total.

3.3 Who do people go with?

Party composition

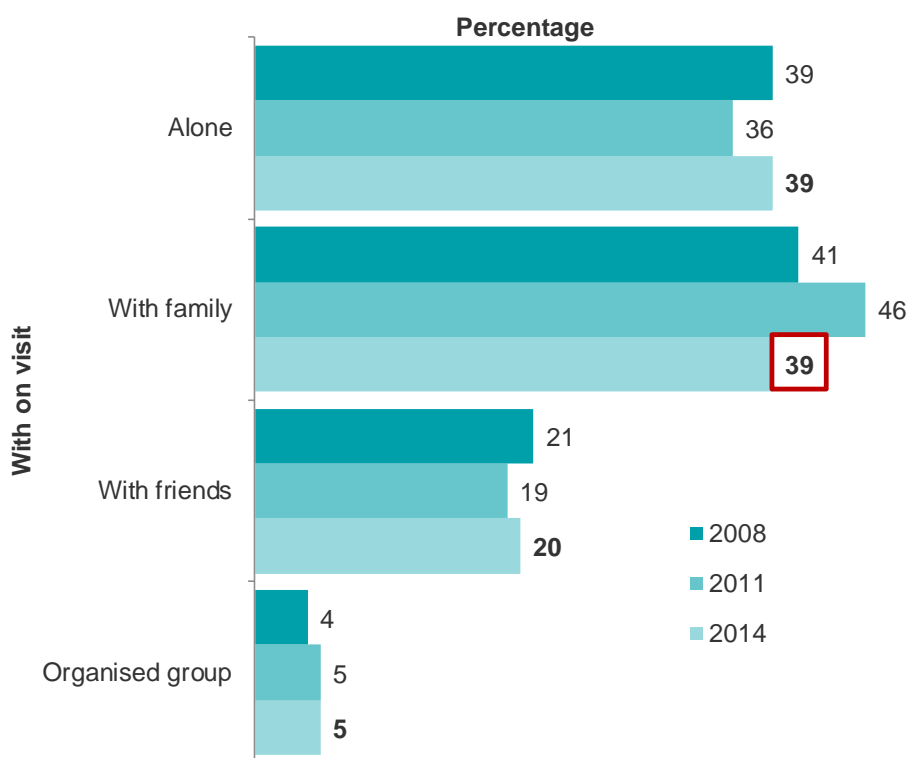
As shown in Figure 3.11 below, equal proportions of visits were taken alone as were taken with family (39% each), while two in ten were taken with friends (20%) and 5% were taken as part of an organised group.

While the proportions of visits taken alone have remained relatively consistent over the years, a decrease in the proportion of visits taken with family was recorded in 2014 – 39% compared to 46% in 2011.

Figure 3.11 Party composition (2008, 2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)

Note: multiple responses possible per respondent



Figures inside a red box are significantly lower and in a green box are significantly higher compared to the 2011 figure.

Variations in the party compositions of visits taken by different population groups in 2014 included:

- *Alone (39% of visits overall)* – more likely to be visits taken by those who went running (62%), those aged 55 and over (49%), those with a household income up to £15,599 (47%), those without a car (47%) and people with no children in the household (45%).

- *With family (39% of visits overall)* – a higher proportion of the visits taken by people in the 35 to 54 age group (52%), women (46%) and those in paid employment (43%).
- *With friends (20% of visits overall)* – more likely on visits taken by 16 to 24 year olds (34%).

As shown in Table 3.2 below, a quarter of visits taken in 2014 involved a party of two people (25%). An equal proportion of visits had a party of between 3 and 5 members (25%), while around one in ten involved a larger party of 6 or more people (11%). The largest proportion of visits (39%) were taken by respondents alone. The mean party size has increased slightly year on year (3.4 in 2008, 3.7 in 2011 and 4.4 in 2014).

Table 3.2 Number of people in party (2008, 2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)

No. of people in party	2008*	2011	2014
1	39	36	39
2	30	27	25
3	11	12	11
4-5	10	15	14
6-9	4	6	5
10+	5	5	6
Mean	3.4	3.7	4.4

The grey box indicates a significant variation over time (2008-2014)

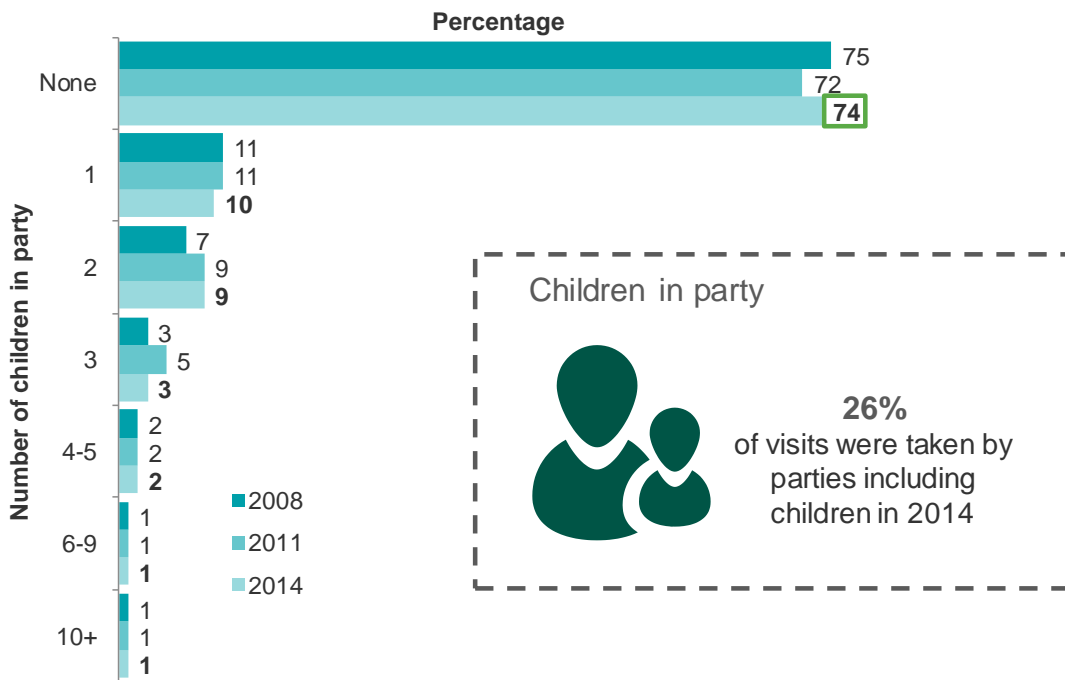
As may be expected, frequent visitors to the outdoors were more likely to visit alone with 47% of those who had taken 21 or more visits in the last 4 weeks indicating that their most recent visit has been taken alone compared to 26% of less frequent visitors. By comparison, a third of infrequent visitors (1-20 visits in the last 4 weeks) visited as part of a group of 4 or more people (33%) compared to 21% of frequent visitors.

Children in the party

Around a quarter of outdoor visits included children in the party in 2014, a similar proportion to previous years.

Figure 3.12 Number of children in the party on most recent visit (2008, 2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2008 – 5,273; 2011 – 5,626; 2014 – 4,941)



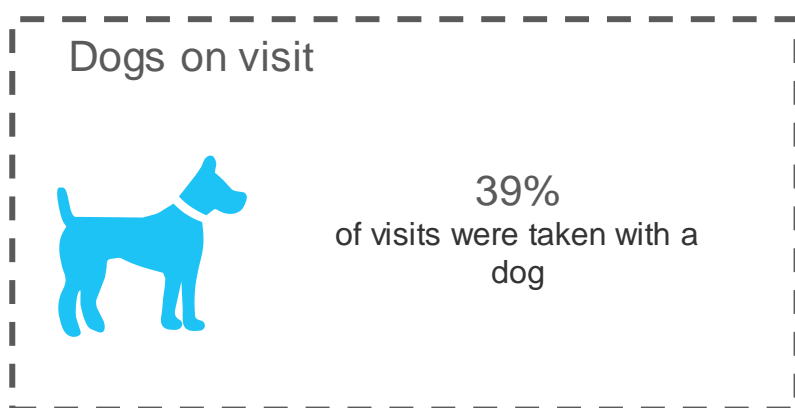
In 2014, children were more likely to have been included in the party on visits taken by those aged 25-54 (37%), women (31%) and those in paid employment (30%). Children were also more likely to be included in the party on visits where picnicking (60%), sightseeing/ visiting attractions (36%) or informal games (35%) were the main activities undertaken.

Dogs on visit

In all years, a dog or dogs were taken on around two-fifths of outdoor visits (39% in 2014). In terms of the types of place visited, visits where farmland or woodland/forestry were the main destination were more likely to be taken with a dog (56% and 54% of visits respectively), similar to 2011. Those on a visit where walking was the main activity were also more likely to have been accompanied by a dog than the average (52%).

Figure 3.13 Whether accompanied by a dog on most recent visit (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)

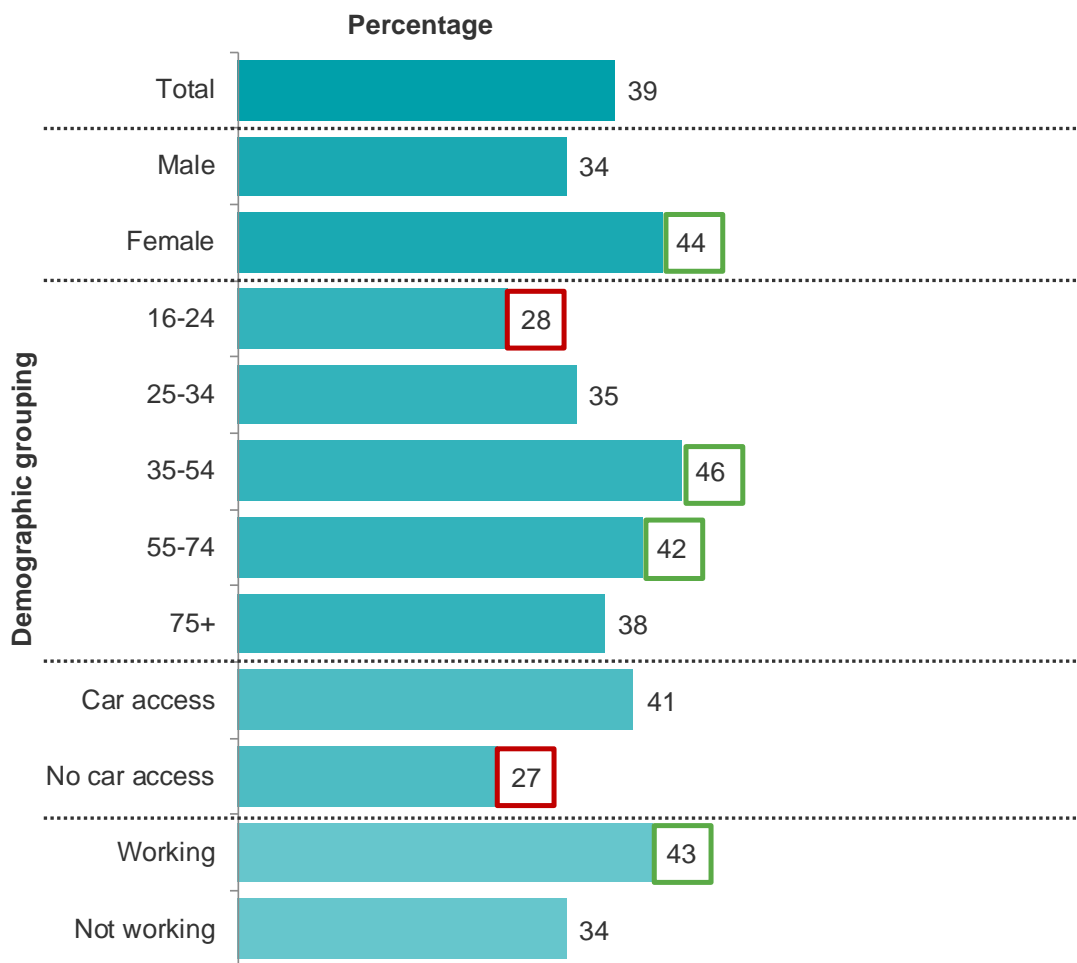


As shown in Figure 3.14 overleaf, visits where dogs were included in the party were more likely to be taken by women (44%), those between the ages of 35 and 74 (44%) and those in paid employment (43%).

Visits taken by those aged 16 to 24 (28%) and those taken by people with no access to a car (27%) were less likely than the average to have included a dog.

Figure 3.14 Whether accompanied by a dog on most recent visit (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)



Figures inside a green square are significantly higher than the total e.g. 44% of visits taken by women were accompanied by a dog compared to 39% amongst the total sample. Figures inside a red box are significantly lower than the average

3.4 Why do they go?

In addition to understanding the characteristics of visits to the outdoors, a key area of interest is the motivations for visiting the outdoors. As shown in Figure 3.15 (overleaf), the most frequently mentioned motivations in 2014 were health or exercise (23% of visits) and/or walking the dog (22% of visits), followed by visits for pleasure or enjoyment (15% of visits) and for fresh air/ pleasant weather (14% of visits).

Health or exercise and exercising a dog were also the most frequently mentioned motivations for visits in 2008 (36% and 26% respectively). The theme of health and visits to the outdoors, including variations in health and exercise as a motivation, are discussed in more detail further on in this section (see section 3.6).

During 2014 there were some variations in the reasons for visiting the outdoors amongst different demographic groups:

- *Exercise a dog (22% of visits overall)* – stated as a motivation for almost half (41%) of the visits taken by dog owners.
- *Pleasure/ enjoyment (15% overall)* – more likely to be a motivation on the visits taken to go sightseeing or visiting an attraction (24%).
- *Fresh air/ pleasant weather (14% of visits overall)* – more likely to be a motivation on visits taken by people without a dog (16%).
- *To enjoy/ participate in a hobby (7% overall)* – more likely to be the motivation amongst those living in North Wales (11%) and men (10%).
- *Enjoy scenery/ wildlife (7% overall)* – more likely to be a motivation on those visits taken by people aged 55 and over (9%).
- *Entertain children (6% overall)* – more likely to be a motivated for those aged 25-34 (15%) and those who do not have a dog (9%).

Figure 3.15 Motivations for visiting the outdoors on most recent visit (2011, 2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2011 – 5,626; 2014 – 4,941)

Note: multiple answers possible per respondent



* 2008 figures not included due to the introduction of new codes in 2011. Figures in a red box are significantly lower compared to 2011

Variations in motivations were evident by the main activity and main destination visited. Some of the most notable variations included the following:

- *Fresh air/ pleasant weather (14%)* – more likely to be the motivation on visits to the beach (24%) or other coastline (25%).
- *Exercise a dog (22% overall)* - more likely to be a motivation on visits where walking (35%) was the main activity undertaken and on visits where a river, lake or canal (30%) were the main destinations visited.
- *Pleasure/ enjoyment (15% overall)* - more likely to be a motivation on visits where sightseeing/ visiting an attraction (24%) was the main activity undertaken and on visits where the sea (37%) or a beach (22%) were the main destinations visited.
- *Enjoy scenery and wildlife (7% overall)* - more likely to be a motivation on visits where wildlife watching (27%) or sightseeing/ visiting an attraction (15%) were the main activities undertaken and where a beach (11%) or other coastline (17%) were the main destinations visited.

- *Entertain children (6% overall)* - more likely to be a motivation on visits where visiting children's playgrounds or other outdoor areas (53%) was the main activity undertaken and those where a local park was the main destination visited (23%).
- *Spend time with family (4% overall)* – more likely to be a motivation on visits where sightseeing/ visiting attractions (9%) or visiting children's playgrounds or other outdoor areas (18%) were the main activities undertaken and on visits where an other coastline was the main destination visited (9%).
- *Relax/ unwind (2% overall)* - more likely to be a motivation on visits where wildlife watching (6%) was the main activity.

3.5 Expenditure

As shown in Figure 3.16 overleaf, money was spent during 42% of visits taken to the outdoors. The average amount spent across ALL visits was on average £12.74, whilst the total per visits on those trips where any money was spent was £30.51. It should be noted that while questions regarding expenditure were included in the survey, it is not possible to determine the level of spend that is directly attributable to the visit itself (e.g. petrol may have been purchased that was also used for other visits).

In terms of categories of expenditure, the proportion spending anything on food and drink was highest, with 30% of visits involving spend on this category during the visit and an average spend of £14.06. 18% of visits involved money being spent on fuel during the visit, with an average spend of £17.44.

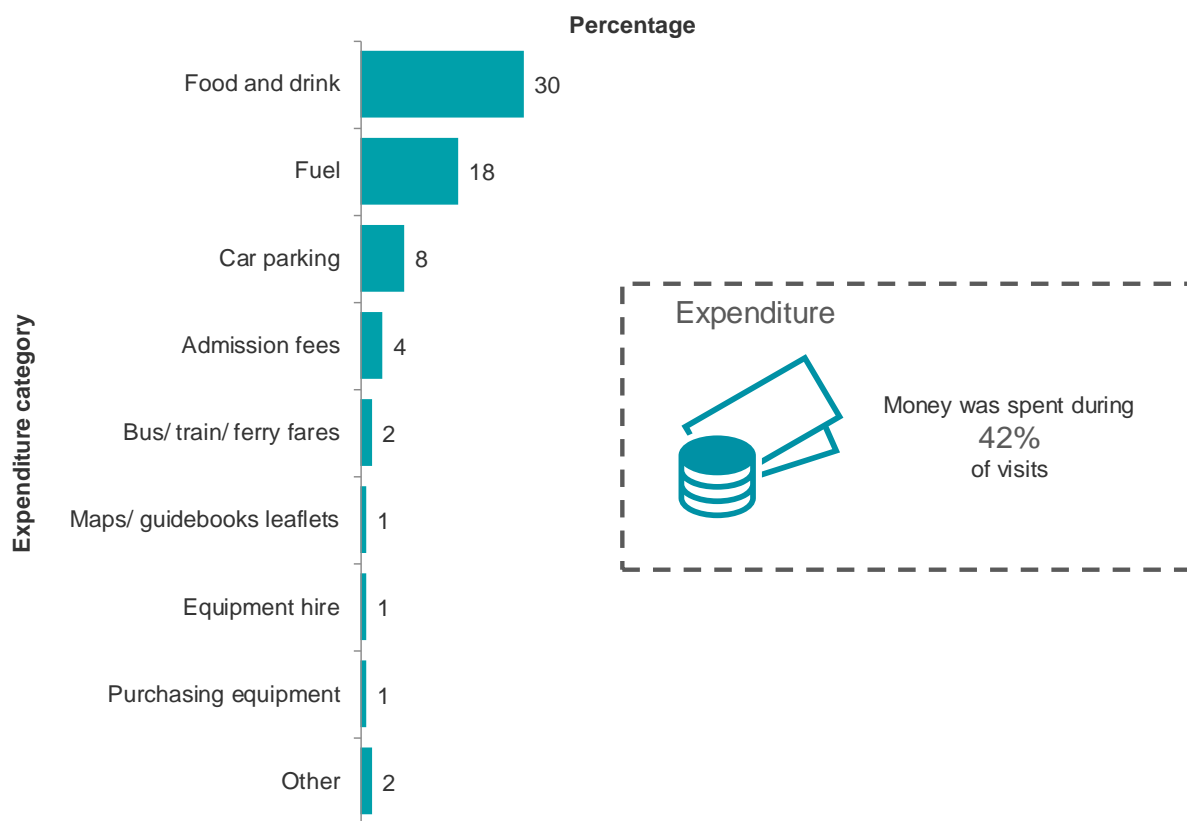
Variations within the sample in the proportions spending any money on these expenditure categories included:

- *Food and drink (30% overall)* – higher than average proportions spending anything on this on visits taken by those who do not own a dog (37%) and those where sightseeing/ visiting attractions (73%) or visiting children's playgrounds/ other areas (43%) were the main activities undertaken;
- *Fuel (18% overall)* – spend on this category was higher than the average on visits taken by those in paid employment (22%) and by those with children in the household (24%). Visits where sightseeing/ visiting attractions (41%) and wildlife watching (36%) were the main activities undertaken were more likely than the average to have included spend on fuel during the visit.

Figure 3.16 Spend during most recent visit (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)

Note: multiple answers possible per respondent



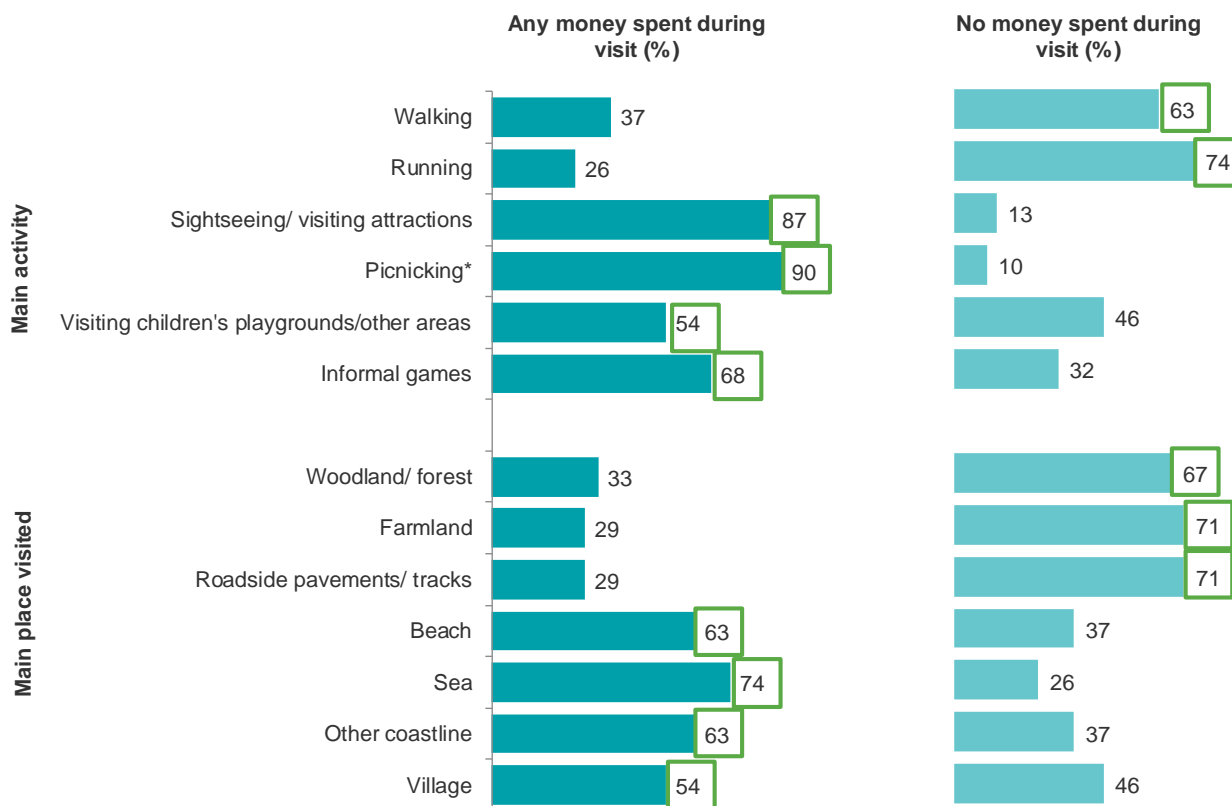
When analysed by location, expenditure on both of these categories was higher than the average on visits to beaches (45% included spend on food and drink and 34% spend on fuel) and the sea (60% and 48% respectively).

As shown in Figure 3.17 overleaf, visits where visiting children’s playgrounds/ other areas (54%), informal games (68%), sightseeing/ visiting attractions (87%) or picnicking were more likely than the average to have included some form of expenditure during the visit, while spend was lower than the average on visits where the main activity was walking (37%) or running (26%).

When analysed by main destination visited, any level of spend during the visit was higher than the average on visits taken to the beach (63%), the sea (74%), other coastline areas (63%) or villages (54%) but lower on visits taken to woodlands/ forests (23%), farmland (29%) or roadside pavements/ tracks (29%).

Figure 3.17 Any spend during most recent visit by main place visited and main activity (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)



Figures inside a green square are significantly higher than the total e.g. there was no money spent during 63% of visits where walking was the main activity compared to 58% amongst the total sample.

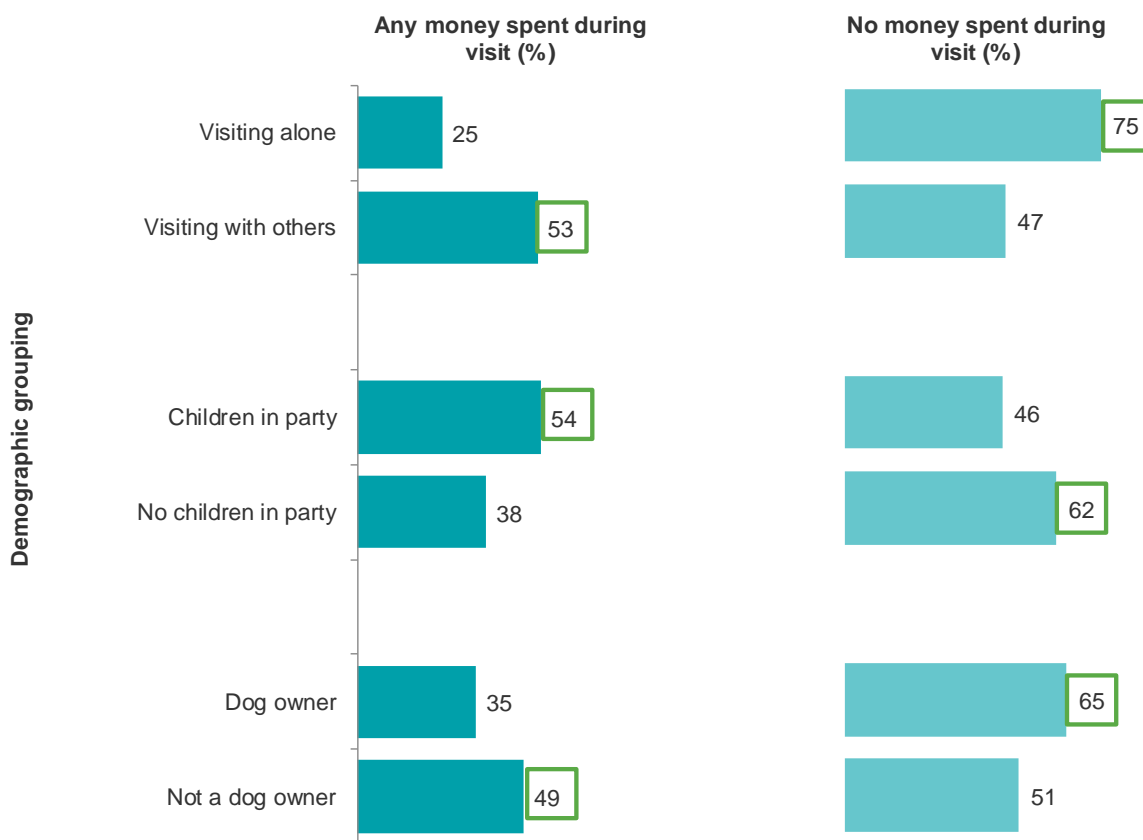
*Caution, small sample – picnicning (89)

Visits taken with other people, be it friends, family and/or an organised group, were more likely than the average to have included any level of spend during the visit (53%), as were those where children were included in the party (54%) and those taken by people who did not own or care for a dog (49%).

Three-quarters of visits taken alone did not involve any money being spent during the visit (75%), as did 62% of visits taken without any children in the party and 65% of visits taken by those who owned or cared for a dog.

Figure 3.18 Any spend during most recent visit by party composition, children in party and dog ownership (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)



Figures inside a green square are significantly higher than the total e.g. there was no money spent during 75% of visits taken alone compared to 58% amongst the total sample.

3.6 Health

As shown in Figure 3.19 below, around a quarter of visits in 2014 were taken for health or exercise reasons (23%), a similar proportion to the previous survey (26%).

Figure 3.19 Health/ exercise as a motivation for visiting the outdoors on most recent visit (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)



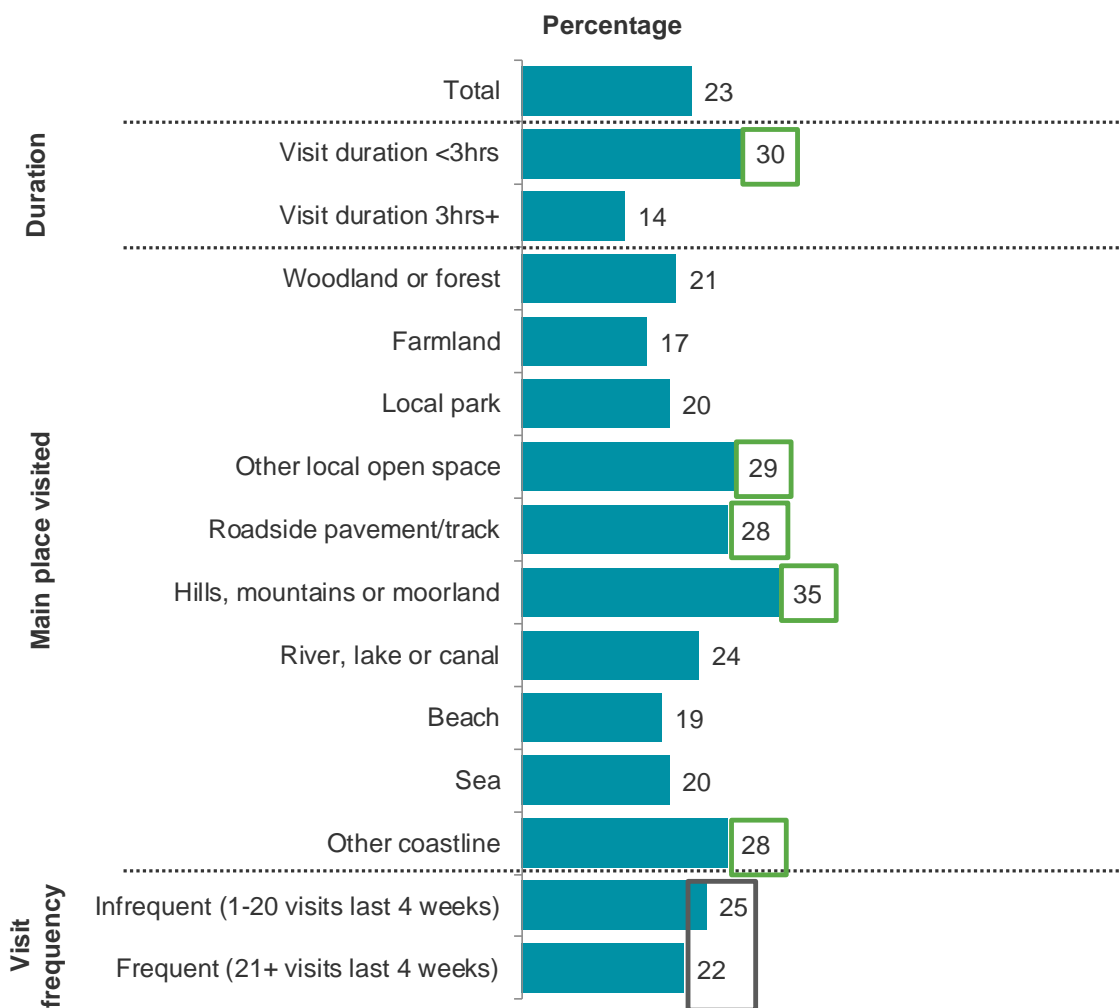
Health or exercise was more likely to be cited as a motivation on visits taken by 55 to 74 year olds (29%), those who do not own a dog (28%) and those where running (81%) was the main activity undertaken.

As shown in Figure 3.20 overleaf, several significant variations were recorded for health/ exercise as a motivation when analysed by the total visit duration, main place visited and frequency of visits.

Health or exercise was more likely than the average to be cited as a motivation on visits that were less than 3 hours in duration (30%) and on visits where roadside pavements/ tracks (28%), other local open spaces (28%) or hills/ mountains/ moorland (35%) were the main visit destinations. In addition, visits taken by infrequent visitors to the outdoors (those who had taken 1-20 visits in the last 4 weeks) were more likely than those taken by frequent visitors to have health/ exercise cited as a reason for the visit (25% and 22% respectively).

Figure 3.20 Variations in health/ exercise as a motivation most recent visit (2014, %)

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941)



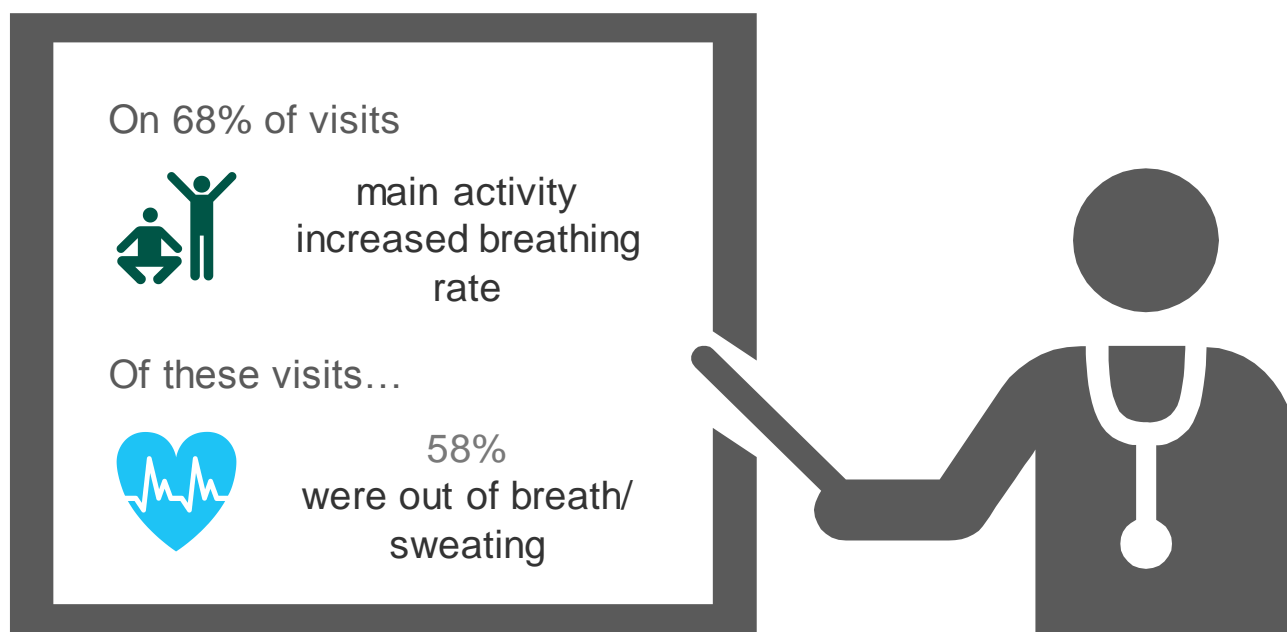
Figures inside a green square are significantly higher than the total e.g. 29% of visits taken by to an other local open space had health or exercise cited as a motivation compared to 23% overall. Figures the grey rectangle are significantly different within the category i.e. infrequent visitors were more likely to cite this as motivation than frequent visitors

Intensity of activity

Those who had visited the outdoors in the last 4 weeks in 2014 were asked questions regarding the intensity of the main activity they had undertaken. In just over two-thirds of visits taken during 2014, respondents reported that the main activity was enough to raise their breathing rate (68%), a figure that did not differ greatly from previous years.

Figure 3.21 Intensity of main activity undertaken

Base: All who had visited the outdoors in the last 4 weeks (2014 – 4,941); visits where main activity raised breathing rate (3,180)



Those who indicated that their main activity increased their breathing rate were then asked if their activity caused them to be out of breath or to break into a sweat. Just over half of these respondents indicated that this was the case (58% in 2014), a similar figure to those recorded in previous surveys. In 2014, visits taken by those aged 16 to 34 (66%) were more likely to have made the participant out of breath or sweating, (this age group is more likely to have taken part in running on their most recent visit).

Looking at all outdoor visits in 2014, those where running, off-road cycling/mountain biking and/ or road cycling were the main activities undertaken were more likely than the average to have caused those taking the visit to state that they had been out of breath and/or sweating (96%, 94% and 88% respectively). This was also the case for visits where the main destination visited was hills, mountains or moorland (73%).

Health benefits were less likely to be reported for visits where sightseeing/ visiting attractions (33%), picnicking (48%) or visiting children's playgrounds/ other outdoor areas (50%) were the main activities and for visits where other local open spaces (46%) or villages (46%) were the main destination.



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Section 4: Future demand

In addition to assessing current behaviour, the survey looked at future demand for visiting the outdoors more often. This section includes results relating to future demand for visiting places and undertaking specific activities, as well as the barriers that have prevented respondents from taking part or visiting as often as they would like.

Key findings:

- Overall, six in ten members of the adult population in Wales would like to visit the outdoors for recreation more often (60%), a figure which has remained consistent since 2008. Demand was higher in 2014 amongst those already more likely to visit the outdoors, with those who had taken a visit in the last 4 weeks more likely to be interested in visiting more often than those who had not.
- Interest in specific activities did not vary significantly for the most part with the exception of increased interest in walking, an activity which decreased in 2014 in terms of actual participation.
- The destinations of greatest interest overall were ones that typically involve a greater amount of travel – beaches and mountains/ hills/ moorland. As shown previously, visits taken to destinations further afield are more likely to incur some level of spend, particularly visits to beaches but are less likely to be taken on a frequent basis.
- As with visits taken in the last 4 weeks, a lack of time and poor weather were the most frequently cited barriers in relation to not visiting the outdoors more often, or indeed at all, in the last 12 months. Given that health considerations were more likely to be cited as a reason for not visiting in the last 12 months, it is likely that the higher future demand amongst current visitors had an influence over the barriers cited in relation to visiting more often.

4.1 Future demand

Future demand – overall

Overall six in ten (60%) adults resident in Wales would like to visit the outdoors for recreation more often, an equal proportion to those recorded in 2011 and 2008.

Table 4.1 Variations in levels of future demand (2014, %)

Base: All respondents (2014 – 5,995)

	Would like to visit outdoors more often %
Total	60
16-24	67
25-34	70
35-54	67
55-74	51
75+	39
Working	66
Not working	54
Children in household	68
No children in household	58
Visited in last 4 weeks	61
Not visited in last 4 weeks	56

Figures inside a green square are significantly higher than the total e.g. 67% of 16-24 year old indicated that they would like to visit more often compared to 60% overall. Figures the grey rectangle are significantly different within the category i.e. those who visited in the last 4 weeks compared to those who did not

Those more likely to be interested in visiting the outdoors more often included 16 to 54 year olds (67%), people with children in the household (68%) and those in paid employment (66%). Those who had taken a visit in the last 4 weeks were more likely than those who had not to indicate that they would like to visit more often (61% and 56% respectively).

In contrast, a lower than average proportion of people aged 55 and over (48%) and those not in paid employment (54%) expressed an interest in visiting the outdoors more often.

Future demand – activities

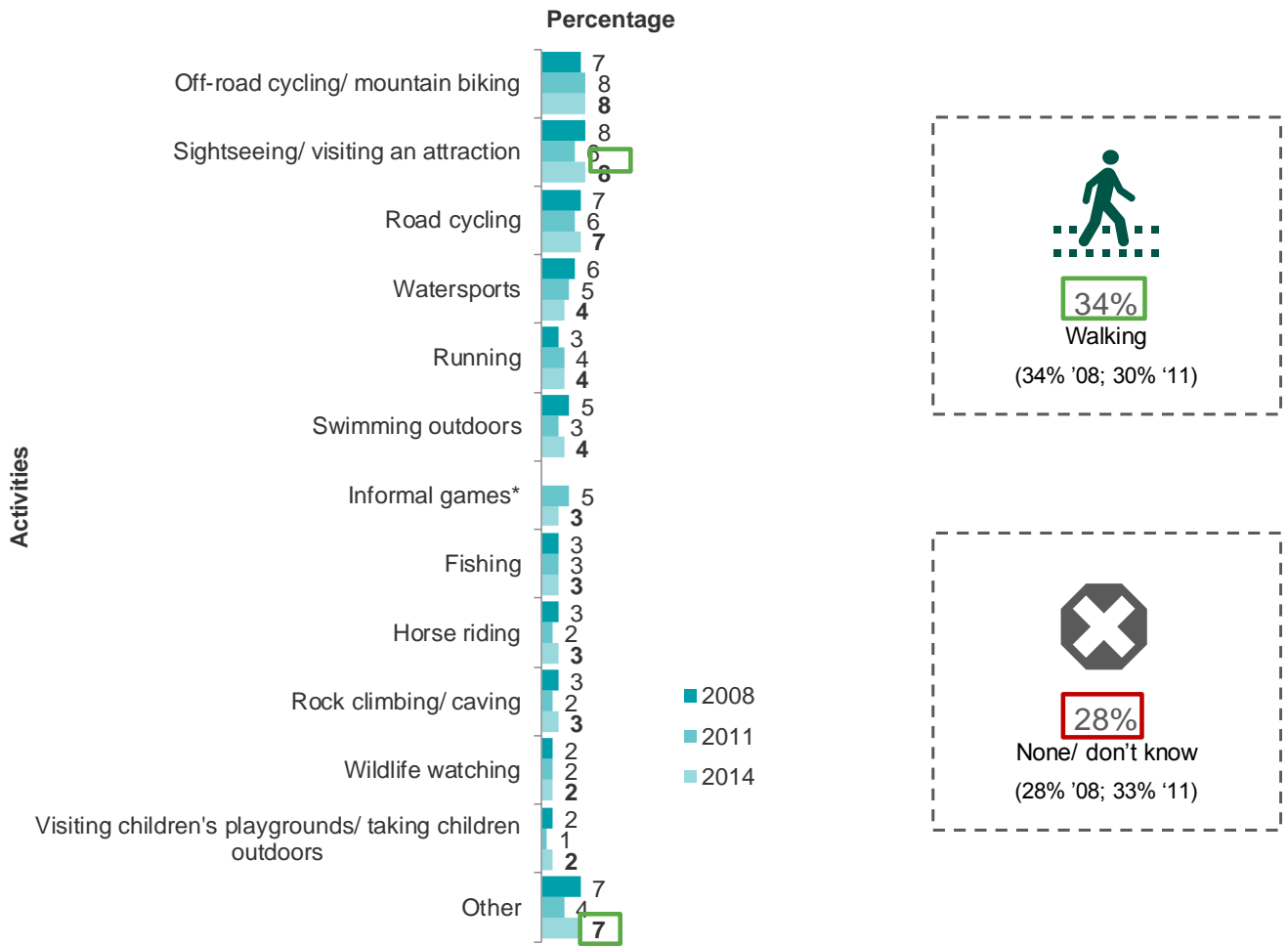
In addition to being the most frequently undertaken activity amongst those who visit the outdoors, walking was also the activity that the highest proportion of respondents would like to do more often (34% in 2014 – see Figure 4.1 overleaf). This activity was more likely to be of interest to women (38%), people in paid employment (37%) and those who do not own a dog (37%).

Other variations in demand to take part more often in different activities included:

- *Off-road cycling/ mountain biking (8% overall)* – more likely to be of interest to those aged 35-54 (12%) and people with children in the household (12%).
- *Sightseeing/ visiting an attraction (8% overall)* - more likely to be of interest to those with a long-term illness or disability (10%).
- *Road cycling (7% overall)* - more likely to be of interest to those aged 35-54 (10%) and people with children in the household (9%).
- *Running (4% overall)* - more likely to be of interest to those aged 16-24 (10%).
- *Rock climbing/ caving (3% overall)* - more likely to be of interest to those aged 16-34 (6%).

Figure 4.1 Activities you would like to undertake more often in outdoors (2008, 2011, 2014, %)*

Base: All respondents (2008 – 6,045; 2011 – 6,393; 2014 – 5995)



* Not included in 2008. Figures in a red box are significantly lower and those in a green box significantly higher compared to 2011

Future demand – places

As shown in Figure 4.2 overleaf, just under three in ten respondents in 2014 indicated that they would like to visit beaches more often than they currently do (28%), with interest in this destination higher than the average amongst those with children (37%), those aged 16 to 54 (35%), women (31%), those in paid employment (33%) and those living in South East Wales (32%).

The second most frequently mentioned type of place that residents of Wales would like to visit more often was hills, mountains and moorland (16%). This category was more likely to be selected as an appealing destination by those aged 35-54 (21%), those in paid employment (20%) and men (19%).

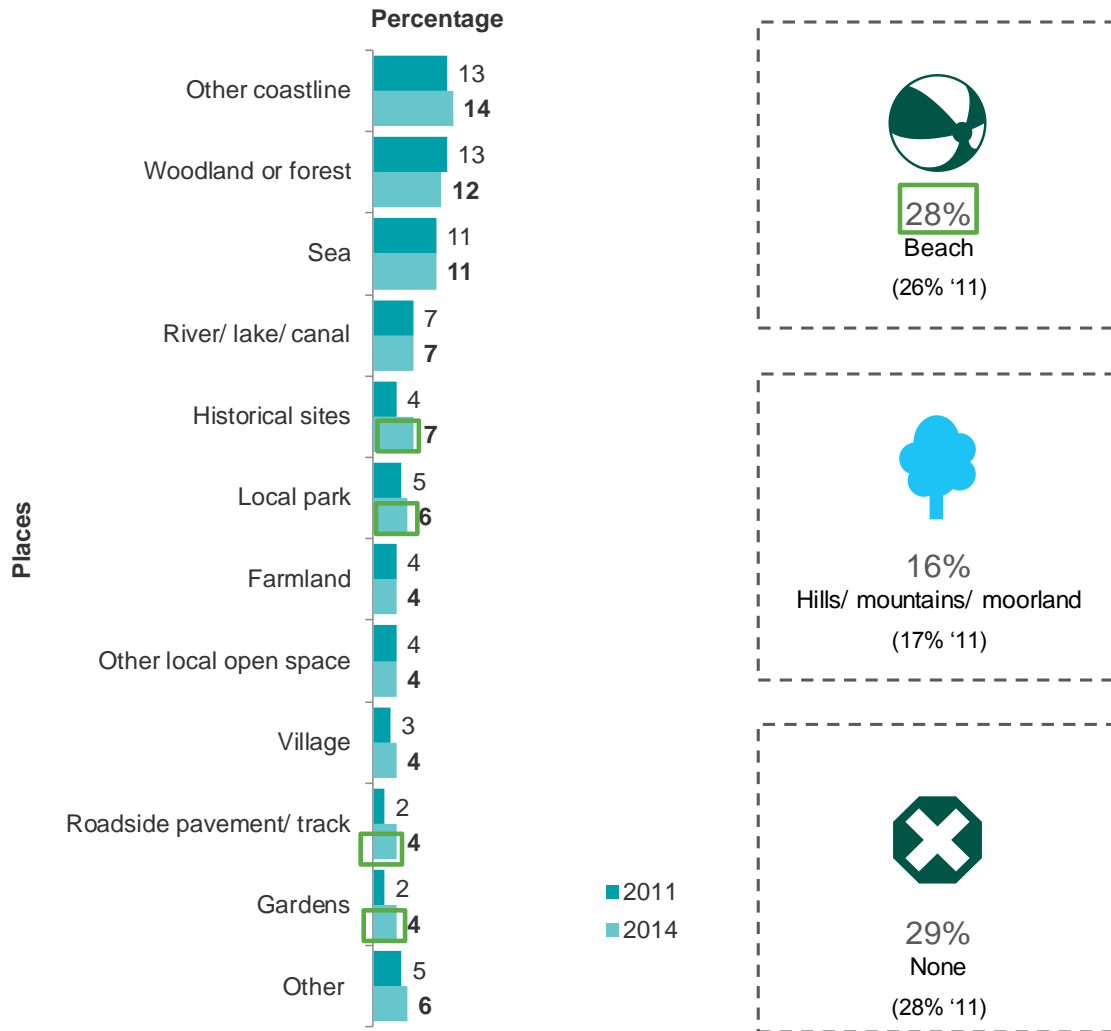
Other variations in interest to visit in future by location in 2014 included:

- *Woodland/ forest (12% overall)* – more likely to be of interest to those with children in the household (15%) and those in the bottom 10% most deprived areas (19%).
- *Other coastline (14% overall)* - more likely to be of interest to those with a HE degree or higher (19%), and those in paid employment (17%).
- *Sea (11% overall)* - more likely to be of interest those with a household income between £50,000 and £79,999 (18%), those with a HE degree or higher (15%) and to those living in South East Wales (13%).

As with demand to undertake activities more often, interest in visiting any of the visit destinations more often was higher amongst those who had taken a visit to the outdoors in the last 4 weeks – 74% compared to 55% of those who had not.

Figure 4.2 Places you would like to visit more often (2011, 2014, %)*

Base: All respondents (2011 – 6,393; 2014 – 5995)



* Question not asked in 2008. Figures in a green box significantly higher compared to 2011

4.2 Barriers to increasing participation

It is important to understand the reasons that may prevent an increase in outdoor visits. Figure 4.3 (overleaf) outlines the reasons selected by respondents for not participating in activities as much as they would have liked in the last 12 months.

Being too busy/ a lack of time was the most cited barrier (34% in 2014), a similar proportion to the previous survey but lower than in 2008 (39%). The proportions mentioning a number of the other barriers were also similar to 2011 but lower compared to 2008.

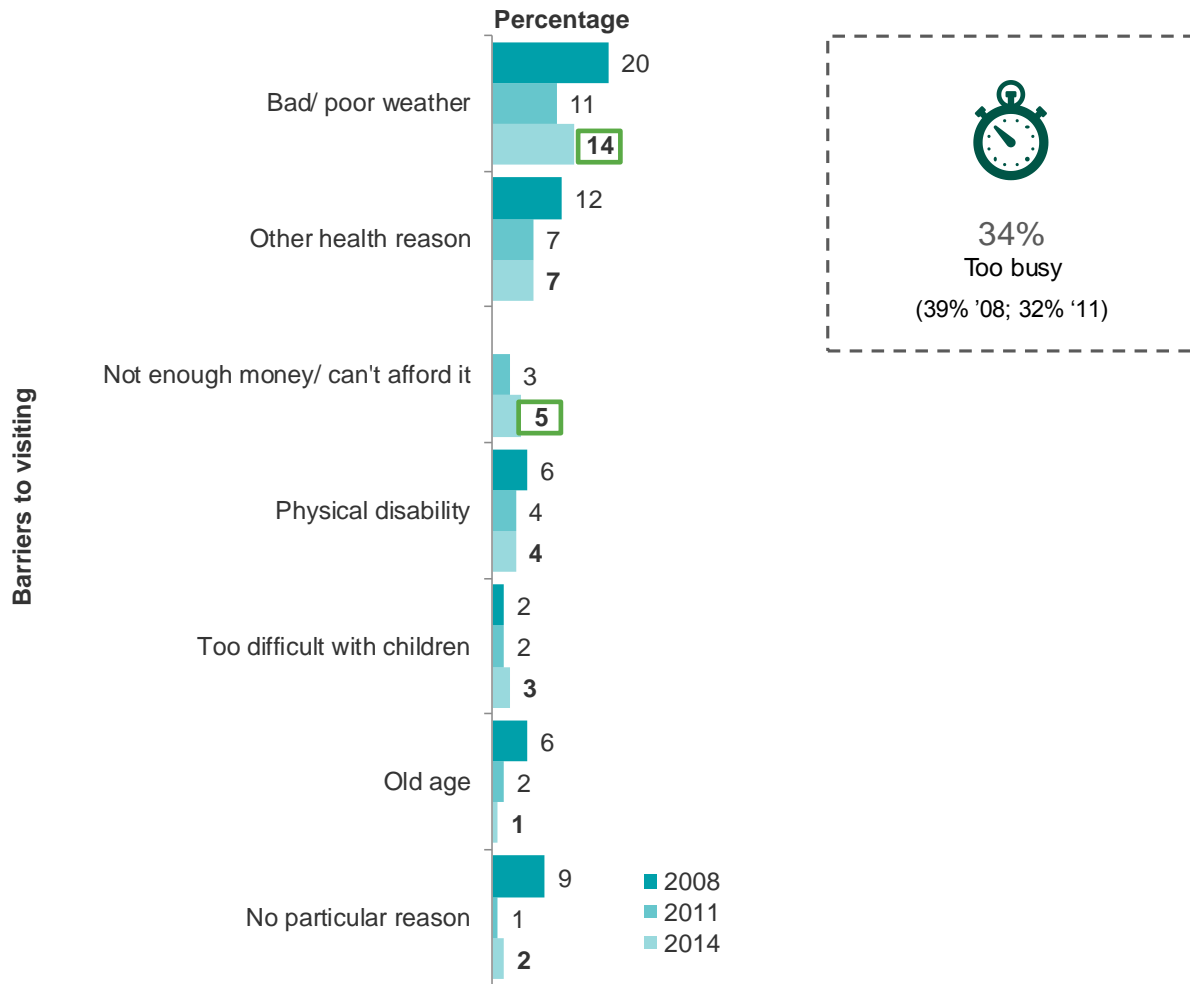
Those more likely to have mentioned being busy or a lack of time as a barrier in 2014 included those in paid employment (50%), those with children (43%) and men (37%).

Other variations in references made to the other main barriers in 2014 included the following:

- *Bad/ poor weather (14% overall)* – more likely to be mentioned by those in paid employment (16%), those who do not have a long term disability or illness (16%) and those with a HE degree or above (16%).
- *Other health reasons (7% overall)* – mentioned as a barrier by 19% of people with a long-term illness or disability. Also more likely to be given as a reason for not increasing participation by those with a household income of £15,599 or less (11%), those aged 55 and over (12%), those with no academic qualifications (11%), those with no access to a car (10%) and those not in paid employment (11%).
- *Disability (4% overall)* - cited as a barrier by a larger proportion of those who are retired (11%), those aged 55 or over (8%), those with no qualifications (8%), those who do not work (7%) and those with a household income of £15,599 or less (7%).

Figure 4.3 Reasons for not doing outdoor activities more/ at all in the last 12 months (2008, 2011, 2014, %)

Base: All respondents (2008 – 6,045; 2011 – 6,393; 2014 – 5995)



Figures in a green box significantly higher compared to 2011



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Section 5: Environmental Attitudes and Behaviours

The results in this section relate to the Welsh adult population's attitudes towards biodiversity perceptions of changes in the biodiversity in Wales, levels of concern about this and the kinds of actions that have been done to help to protect the environment and nature.

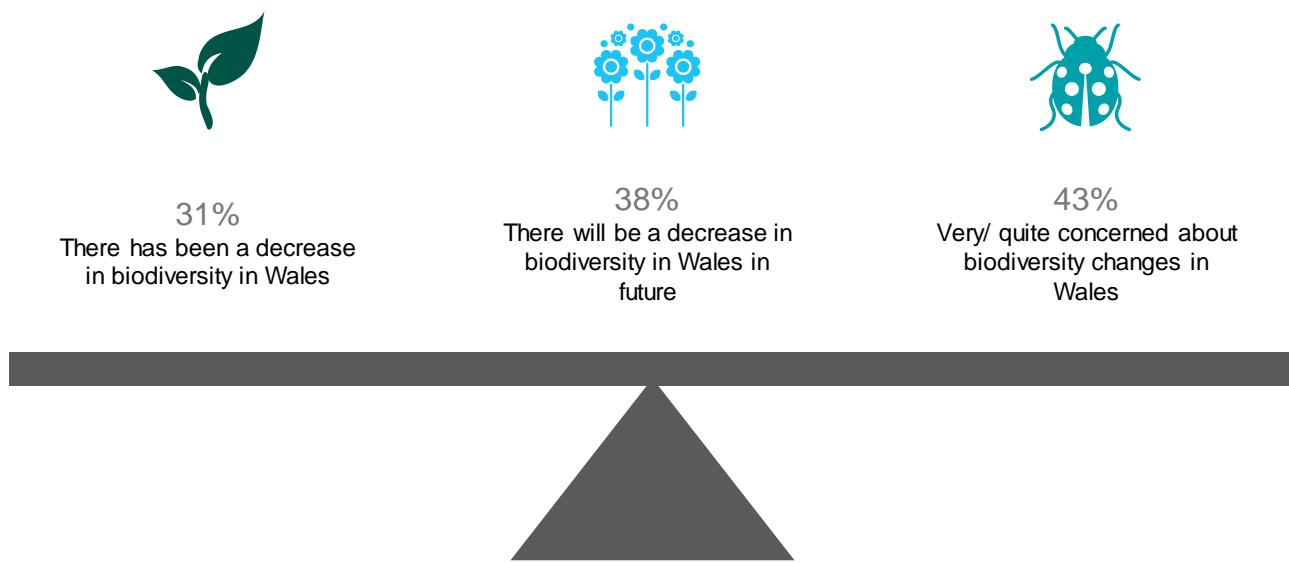
Key findings:

- Overall, members of the adult population of Wales indicated a reasonable level of concern regarding biodiversity, with around two-fifths (43%) stating that they were 'very quite' concerned about this. Around 3 in 10 felt that there had been a decrease in biodiversity in Wales in recent years (31%) and around two-fifths that there would be a decrease in the future (38%). Around a quarter felt that there would be an increase in the future (27%).
- Age was a common factor when analysing attitudes towards biodiversity. Younger people aged 16-24 were more likely than the average to believe that there had been no change, while those aged 55 to 74 were more likely to believe that there had been a decrease and those aged 35 to 54 that were would be decrease in the future. Those aged 35 and over were more likely than younger members of the population to indicate a high level of concern regarding biodiversity in Wales.
- Variations in perceptions were also evident according to whether respondents had visited the outdoors in the last 4 weeks or not. Those who had visited the outdoors were more likely to have perceived a past increase in biodiversity but were more likely than non-visitors to believe that this would decrease in the future. Frequent visitors to the environment (21+ visits in the last 4 weeks) were more likely than the average to participate in several activities to protect it, particularly walking or cycling rather than taking the car.
- While it is not possible to determine what influence concern and action have over each other, if any, variations were evident in relation to participation in behaviours that would benefit the environment amongst those who were 'very' or 'quite' concerned about biodiversity. In particular, those who expressed such levels of concern were more likely to have participated in activities that require a greater investment of effort, time and/or finances such as joining organisations that protect the environment and/or volunteering.

5.1 Environmental Attitudes and Behaviours

In 2014, a section was added to the questionnaire regarding nature and biodiversity. Respondents were told that '*Biodiversity is the term used to describe the variety of all life on earth, this includes all species of animals and plants*'. They were then asked a several questions relating to their views on past changes to biodiversity levels, perceptions of likely future changes and their level of concern.

Figure 5.1 View on biodiversity in Wales



As shown in Figure 5.1 above, around 3 in 10 felt that there had been a decrease in biodiversity in recent years (31%) and around two-fifths that there will be a decrease in the future (38%). 43% of the population indicated that they were very or quite concerned about biodiversity changes in Wales, both in the past and in the future.

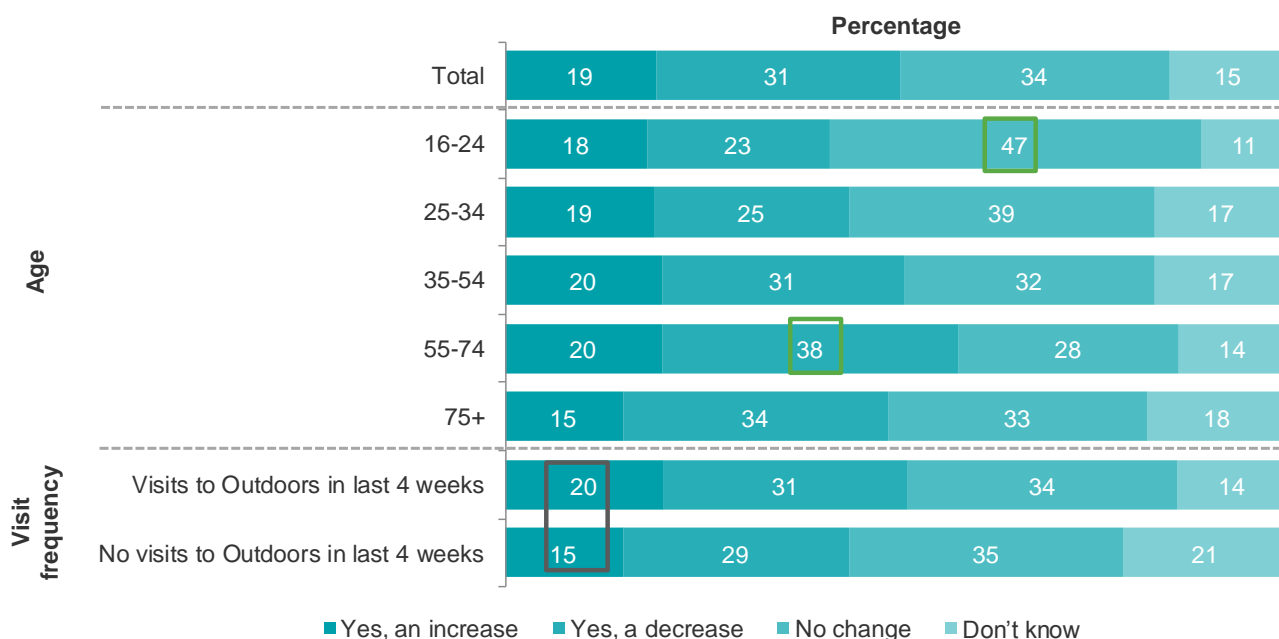
By comparison, (see Figures 5.2 and 5.3) around a third of the population felt that there had been no decrease in recent years and 27% that there will be an increase in the future.

Awareness of biodiversity in Wales

As shown in Figure 5.2, there were variations in perceptions of past changes to biodiversity in Wales. Younger members of the population aged 16 to 24 were more likely than the average to state that there has been no change (47%), whilst those aged 55 to 74 were more likely to have perceived a decrease in biodiversity (38%). Those who had taken any visits to the outdoors in the last 4 weeks were more likely than those who had not to have perceived an increase in biodiversity (20% and 15% respectively).

Figure 5.2 Variations in perceptions of change in biodiversity in Wales (2014,%)

Base: All respondents (2014 – 5995)



Figures inside a green square are significantly higher than the total e.g. 47% of 16-24 year olds believed there would be no change compared to 34% overall. Figures the grey rectangle are significantly different within the category i.e. those who visited in the last 4 weeks compared to those who did not

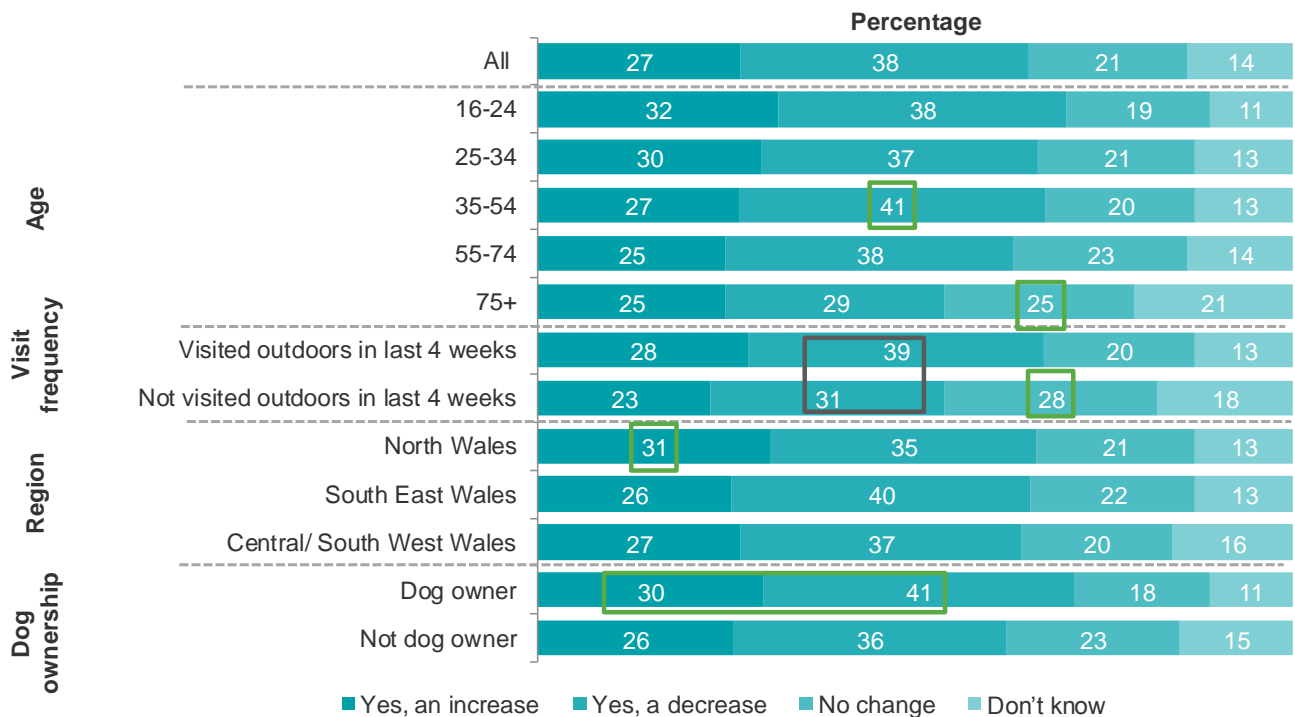
As may be expected, those who indicated that they were 'very' or 'quite' concerned about biodiversity in Wales were more likely than the average to have perceived a decrease in recent years (46%), as were those who visited the outdoors frequently (21 or more visits in the last four weeks, 34%). Those who had visited the outdoors and undertaken wildlife watching as their main activity were more likely than the average to have indicated that there has been a decrease in biodiversity in Wales (47%).

Respondents were also asked if they expected a change in the variety of species in Wales in the future. Around a quarter of the population believed that there would be an increase (27%) while around two-fifths (38%) were of the opinion that there would be a decrease.

Variations by age were evident in relation to future changes in biodiversity. Those aged 35 to 54 were more likely than the average to have indicated that this would decrease in the future (41%), while those aged 75 and over were more likely to perceive that there would be no change (25%).

Figure 5.3 Future change in biodiversity in Wales (2014, %)

Base: All respondents (2014 – 5995)



Figures inside a green square are significantly higher than the total e.g. 41% of 35-54 year olds believed there would be a decrease compared to 38% overall. Figures the grey rectangle are significantly different within the category i.e. those who visited in the last 4 weeks compared to those who did not

Views on the likelihood of future biodiversity changes also varied by whether a visit had been taken in the last 4 weeks. Those who had taken a visit were more likely than those who had not to believe that there would be a decrease (39% and 31% respectively), while those who had not visited were more likely than the average to state that there would be no change (28%).

Those who indicated that they were 'very' or 'quite' concerned about biodiversity in Wales were more likely than the average to believe that this would decrease in the future (51%), as were those who had been a member of an environmental, wildlife, or conservation group (51%) and those who had signed a conservation petition (50%).

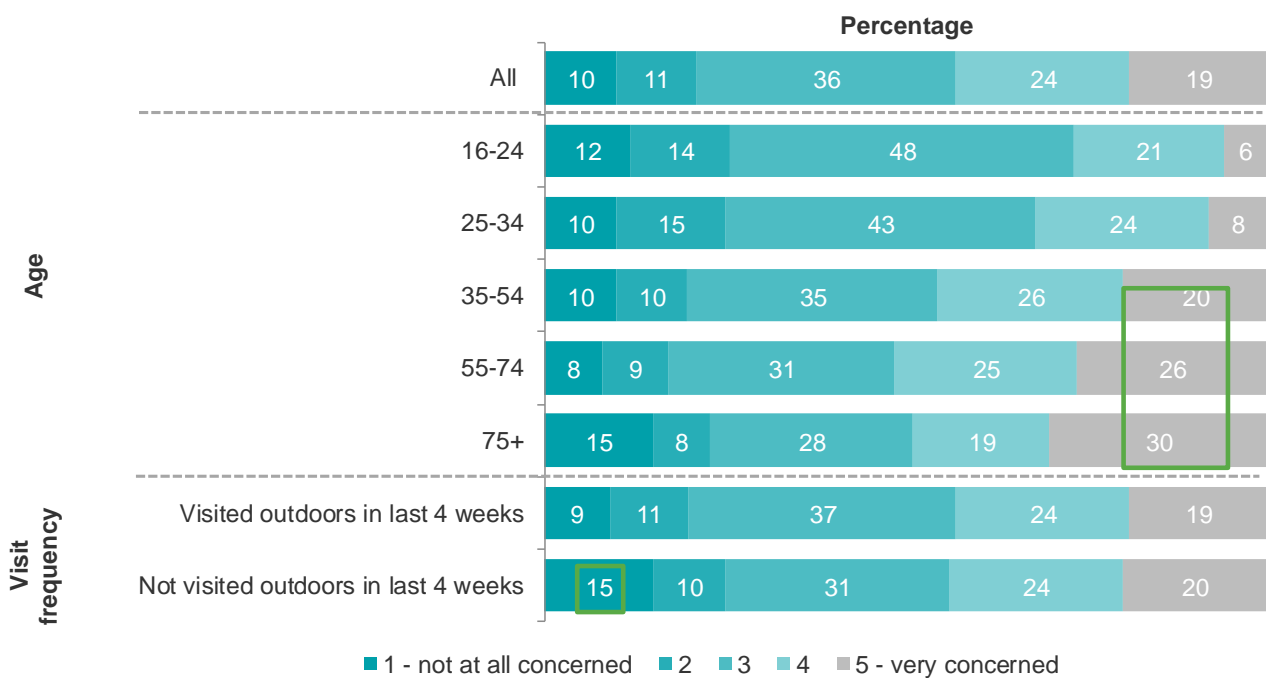
Concerns about changing biodiversity

Respondents were asked to rate how concerned they were about any changes, past or future, to the variety of species in Wales with a rating of 5 equalling 'very concerned' and 1 being 'not concerned at all'.

Around a fifth of the population indicated that they were 'very concerned' about changes to biodiversity (19%), while around a quarter (24%) indicated a reasonably high level of concern (a rating of 4).

Figure 5.4 Concerned about changes to biodiversity (2014, %)

Base: All respondents (2014 – 5995)



Figures inside a green square are significantly higher than the total e.g. 30% of those aged 75+ were 'very' concerned compared to 19% overall

For several sub-groups within the population, there were no significant variations in the level of concern regarding biodiversity. However, once again, variations for this measure can be seen by age, with older respondents indicating the greatest level of concern, particularly those aged 75 and over (30% of whom were 'very concerned').

Variations in concern were discernible for several of the pro-environmental behaviours shown in Figure 5.5. overleaf. Higher than average proportions of those who had signed a conservation petition (66%), been a member of an environmental, wildlife, or conservation group (64%), actively volunteered to help protect the environment (58%) and/or gardened for wildlife (49%) indicated that they were 'very' or 'quite' concerned about biodiversity in Wales.

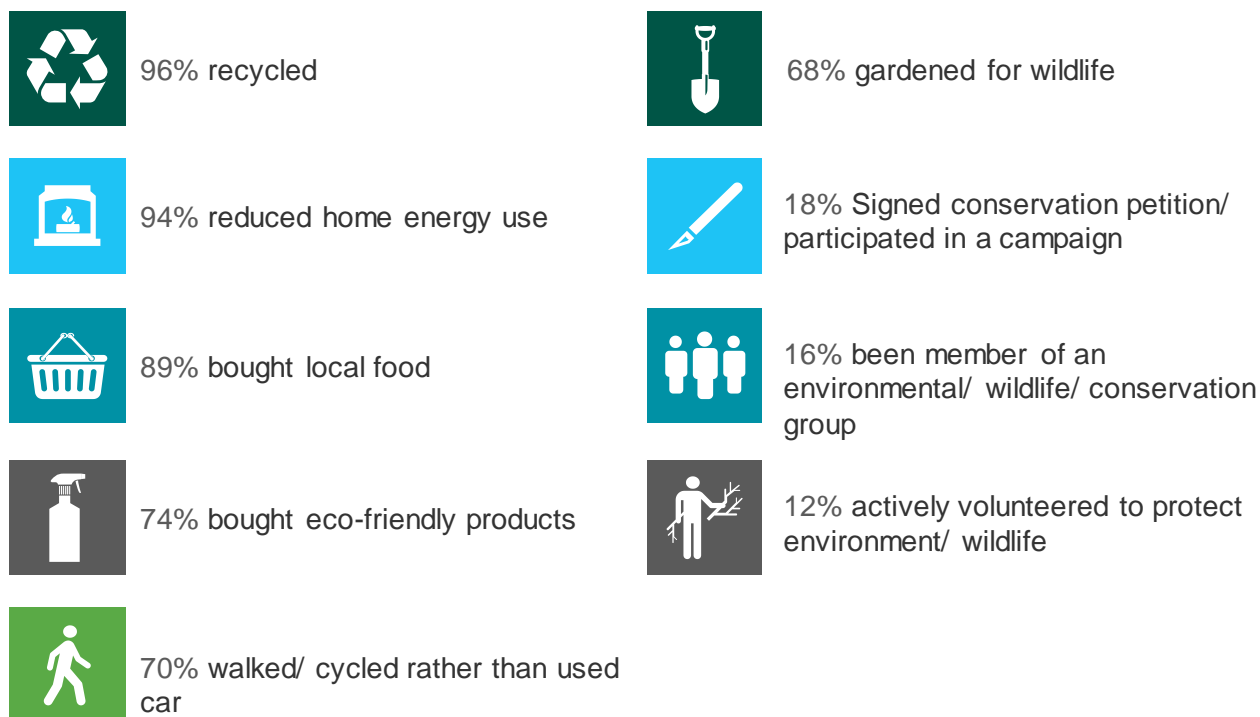
Actions taken to protect nature and the environment

Respondents were asked if they had done any of the activities listed below to help protect the environment and nature. All respondents indicated that they had done at least one action, with an average of 5.4 actions per person. Almost all had recycled (96%), reduced their energy use at home (94%) and/or bought local food (89%).

Actions that were less likely to be undertaken were those that required more effort or resources to incorporate into day-to-day life including participation in petitions/ conservation campaigns (18%), membership of a relevant organisation (16%) and active volunteering (12%).

Figure 5.5 Actions done to protect the environment & nature (2014, %)

Base: All respondents (2014 – 5995)



Variations in participation in pro-environmental behaviours were recorded for several demographic sub-groups within the population, as shown in Tables 5.1 and 5.2 (overleaf).

As shown in Table 5.1 below, participation in most of the pro-environmental behaviours was higher amongst those with access to a car, dog owners and those with children in the household. In particular, participation amongst these groups were higher compared to those with no car access, those who did not own a dog and those without children in the household for buying eco-friendly products and walking/ cycling instead of taking the car.

Table 5.1 Variations in actions done to protect the environment & nature by car access, dog ownership and children in household (2014, %)

Base: All respondents (2014 – 5995)

	Total	Access to Car		Dog Owner		Children	
		Yes	No	Yes	No	Yes	No
Recycled	96	97	90	97	95	98	95
Reduced home energy use	94	94	90	95	93	96	93
Bought local food	89	90	82	91	87	92	88
Bought eco friendly products	74	76	65	78	72	79	73
Walked/ cycled rather than used car	70	73	54	74	68	81	67
Gardened for wildlife (incl. bird feeding)	68	70	55	72	65	71	67
Signed a conservation petition or participated in a conservation campaign	18	18	15	19	17	20	17
Been a member of an environmental/ wildlife/ conservation group	16	17	10	18	15	16	16
Actively volunteered with a project/ organisation to protect environment/ wildlife	12	12	9	13	11	12	12

Figures inside a green square are significantly higher than the total and the other category within that demographic sub-group e.g. 78% of dog owners bought eco-friendly products compared to 74% of the total sample and 72% of those who did not own a dog

Variations by gender and age were also recorded, as shown in Table 5.2 overleaf.

The largest variations in behaviour between men and women were recorded for:

- *Buying eco-friendly products* – 77% of women participated in this activity compared to 71% of men.
- *Gardening for wildlife* - 71% of women participated in this activity compared to 64% of men.
- *Walking/ cycling instead of taking the car* – 73% of men participated in this activity compared to 67% of women.

Table 5.2 Variations in actions done to protect the environment & nature by car access, dog ownership and children in household (2014, %)

Base: All respondents (2014 – 5995)

	Total	Gender		Age				
		Male	Female	16-24	25-34	35-54	55-74	75+
Recycled	96	95	97	93	97	98	97	90
Reduced home energy use	94	93	94	91	94	96	94	89
Bought local food	89	88	90	86	92	89	90	85
Bought eco friendly products	74	71	77	79	77	75	75	59
Walked/ cycled rather than used car	70	73	67	86	81	74	64	37
Gardened for wildlife (incl. bird feeding)	68	64	71	53	61	70	75	72
Signed a conservation petition or participated in a conservation campaign	18	16	19	13	16	23	17	9
Been a member of an environmental/ wildlife/ conservation group	16	16	16	11	11	18	19	14
Actively volunteered with a project/ organisation to protect environment/ wildlife	12	12	12	16	12	12	11	8

Figures inside a green square are significantly higher than the total and the other category within that demographic sub-group e.g. 77% of women bought eco-friendly products compared to 74% of the total sample and 71% of men

By age, those in the 35 to 54 age bracket were more likely than the average to have undertaken several of the behaviours, particularly signing a conservation petition (23%). Walking or cycling instead of using the car was more prevalent amongst those aged 54 and under, while gardening for wildlife was more commonly undertaken by those aged 35 and over.

A number of variations in pro-environmental behaviour participation were recorded by frequency of visits to the outdoors. It should be noted that it is not possible to determine whether or not either of these factors influence the other i.e. whether visits to the outdoors increase propensity to participate in pro-environmental behaviours or vice versa.

However, it is evident from the data that lower levels of participation in behaviours undertaken to protect the environment were recorded for those who had not taken any visits to the outdoors in the last 4 weeks, particularly walking or cycling instead of using the car (30% compared to 70% overall).

Several behaviours were more likely to be undertaken by those who visited the outdoors frequently (21+ visits in the last 4 weeks). The largest variations when compared to the total population were recorded for walking/ cycling instead of using the car (80% and 70% respectively), gardening for wildlife (73% and 68%) and membership of an environmental/ wildlife/ conservation group (21% and 16%).

Table 5.3 Actions done to protect the environment & nature by frequency of visits in the last 4 weeks (2014, %)

Base: All respondents (2014 – 5995)

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

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

In addition, those who indicated that they were 'very' or 'quite' concerned about the natural environment recorded higher than average participation levels for:

- Buying eco-friendly products – 81%.
- Gardening for wildlife – 71%.
- Membership of an environmental/ wildlife/ conservation group – 24%.
- Actively volunteering to protect the environment/ wildlife – 12%.



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Section 6: Summary of key findings

The discussion of the survey findings presented earlier on in this report highlights several key findings emerging from the data collected for 2014 and comparisons with data from the previous surveys.

Propensity to visit and visit characteristics

- The Wales Outdoor Recreation Survey (WORS) continues to record high levels of participation in outdoor recreation in Wales both over the course of the last 12 months and the last 4 weeks. However, decreases in shorter visits and those taken closer to home have contributed to a decrease in the overall level of visits taken in the last 4 weeks in the 2014 survey and a decrease in the proportion of frequent visitors (those who have taken 21 or more visits in the last 4 weeks).
- Over time, an increase in running, both as a main activity and one of several activities undertaken, has been recorded. This is an activity that is more likely than the average to be undertaken at roadside pavements/ tracks. This type of destination can be accessed locally by many and therefore, this activity has the potential to influence levels of frequent visits in the future should participation continue to rise.
- Levels of expenditure were higher on visits that involved more travel and are therefore, less likely to be undertaken on a frequent basis such as visits to beaches and the sea. These destinations were also ones with higher than average levels of demand to visit more in the future. In addition to the economic benefits of such visits, the potential environmental impacts of travel to such destinations is likely to be a consideration – can they be easily reached by more environmentally friendly means such as public transport?

Motivations and barriers

- Health or exercise was one of the most frequently cited barriers to visiting the outdoors in the most recent survey. This was particularly likely to be the case for visits that were less than 3 hours in duration. This is perhaps a message that could be used to drive up levels of frequent visits in the future.
- Barriers to participation were variable depending on the period in question i.e. there was a shift in the prominence of several barriers when considering those who had not visited in the last 12 months and those who had not visited in the last 4 weeks. Health and age considerations are more prevalent when analysing potential long-term barriers to participation, i.e. factors that prevent visits having been taken in the last 12 months. In the shorter term (the last 4 weeks), factors that are perhaps less 'permanent' such as a lack of time and bad weather become are much more influential.

Attitudes and behaviours

- Variations in perceptions of changes in biodiversity were evident by whether or not a visit had been taken to the outdoors in the last 4 weeks. Those who had taken a visit were more likely to have perceived a past increase in biodiversity but also to believe that there will be a decrease in the future. These respondents were also more likely than non-visitors to undertake several actions to help protect the natural environment, most notably walking or cycling rather than taking the car, gardening for wildlife and/or being a member of a relevant organisation.
- Variations were also clear in relation to levels of concern regarding changes to biodiversity. Those who were 'very' or 'quite' concerned were more likely to have indicated a belief that biodiversity levels would decrease in the future. Participation in pro-environmental behaviours was also higher amongst this group including behaviours that require a higher investment of effort, time or money such as being a member of a relevant organisation and/or actively volunteering to protect the environment.
- It should be noted when interpreting these findings that it is not possible to determine whether or not concern and action are influenced by propensity to visit or indeed whether visit levels are influenced by these measures.



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Appendix 1: Questionnaire

**TELEPHONE: CATI QUESTIONNAIRE
FACE TO FACE: CAPI QUESTIONNAIRE**

Job Number	119555
Name of survey	Wales Outdoor Recreation Survey 2014
Questionnaire Version Number	Main survey
Author	Vicky Wilson/0131 6564047

Methodology	Telephone
If face-to-face	Home
Questionnaire	CATI
Duration	15 minutes
Sample Size	6000
Sample Description	Adults aged 16+ living in Wales
Quotas	No quotas for pilot
Several targets?	Target descriptions
No. open ends	
No. other (specify) questions	

Good morning/afternoon/evening, my name is [INTERVIEWER NAME] from TNS UK, an independent research agency and we are carrying out a survey on behalf of Natural Resources Wales, formerly Countryside Council for Wales and Forestry Commission Wales. The survey is about leisure and free time spent in the outdoors. This important study will be used to help improve use of and access to the outdoors in Wales.

The responses you provide will be held, together with your details, by the Natural Resources Wales. This data will be used for research purposes only.

The interview will take around 15 minutes.

INTERVIEWER NOTE IF NECESSARY:

Natural Resources Wales brings together the work of the Countryside Council for Wales, Environment Agency Wales and Forestry Commission Wales, as well as some functions of Welsh Government. Its purpose is to ensure that the natural resources of Wales are sustainably maintained, enhanced and used, now and in the future.

S1 Can I just check whether you live in Wales?

Yes PROCEED TO NEXT SCREEN

No THANK AND CLOSE

S2 MOVED TO END QUESTIONNAIRE

PART 1 SCREENER QUESTIONS

S3 To make sure we speak to a good cross section of the public, can you please tell me how many people aged 16 or over currently live in your household, including yourself?

CODE NULL IF NOT PEOPLE AGED 16 AND OVER

NULL CODE IF NO PEOPLE AGED 16 AND OVER

1 GO TO S7

2 GO TO ROUTING BEFORE S4A

3 GO TO S4

4 GO TO S4

5 GO TO S4

6 GO TO S4

7 or more GO TO S4

Don't know GO TO S4

Refused GO TO S4

ASK S4 IF S3 = 3,4,5,6,7,8 OR 9 AND RIZZO METHOD SELECTS ANOTHER MEMBER OF THE HOUSEHOLD. IF SCREENER RESPONDENT SELECTED VIA RIZZO, GO TO S7

S4 Could I speak to the person aged 16 and over who has the next birthday?

THIS DOES NOT INCLUDE THE PERSON YOU ARE SPEAKING TO. IT MUST BE ANOTHER MEMBER OF THE HOUSEHOLD.

IF NECESSARY SAY:

The person with the next birthday is selected to ensure we achieve a nationally representative sample of adults in Wales.

Yes, available code here when speaking to them **GO TO S7**

No, not available **GO TO S5**

Wrong language (excluding Welsh) **THANK AND CLOSE**

Proxy refusal – soft

Proxy refusal – hard

Proxy – other non interview

Proxy interview **GO TO S7**

Proxy interview – Type Talk **TYPE TALK**

ASK S4A IF S3=2 AND RIZZO DOES NOT SELECT THE SCREENER RESPONDENT.

IF SCREENER RESPONDENT SELECTED VIA RIZZO, GO TO S7

S4a In households where there are no more than two adults we are using a random method to select which one of these adults takes part in this survey. On this occasion, it is the other person that I would like to speak to. May I speak to that person?

Yes, available code here when speaking to them **GO TO S7**

No, not available **GO TO S5**

Wrong language (excluding Welsh) **THANK AND CLOSE**

Proxy refusal – soft

Proxy refusal – hard

Proxy – other non interview

Proxy interview **GO TO S7**

Proxy interview – Type Talk **TYPE TALK**

ASK S5 IF S4=2 OR S4A=2 (NO NOT AVAILABLE)

S5 Please can I take the person's name?

EXPLAIN THAT YOU NEED THIS SO THAT YOU KNOW WHO TO ASK FOR THE NEXT TIME YOU ALL TO DO THE INTERVIEW

Type in name **GO TO APPOINTMENT SCREEN TO BOOK APPOINTMENT**

Proxy refusal – soft

Proxy refusal – hard

IF S5=1, GO TO APPOINTMENT SCREEN TO BOOK APPOINTMENT

ASK S7 IF S3=1 OR S4=1 OR S4A=1

S7 Would you prefer to complete this survey in Welsh or English?

English **GO TO S8**

Welsh **GO TO APPOINTMENT SCREEN TO BOOK APPOINTMENT**

IF S7=1

S8 – INTERVIEWER TO CODE

PLEASE CODE

Respondent willing

Hard refusal

Soft refusal

Wants appointment **GO TO APPOINTMENT SCREEN TO BOOK APPOINTMENT**

In this survey we are interested in leisure visits and excursions to the outdoors of any length.

These visits may have been made from your home or during holidays.

By outdoors, we mean open spaces anywhere in the countryside or in towns and cities, including your local neighbourhood, paths, woodland, parks and farmland. Visits may have involved any informal outdoor recreation, including both active or passive pursuits.

PART 2 VISITS IN THE LAST 12 MONTHS
--

The next few questions are about visits to the outdoors you have made during the last 12 months.

ASK ALL

Q1a Which of the following activities have you undertaken at least once during visits to the outdoors in the last 12 months?

ROTATE ORDER MULTICODE

READ OUT LIST. CODE ACTIVITIES PARTICIPATED IN LAST 12 MONTHS

1. Walking
2. Road cycling
3. Off-road cycling or mountain biking
4. Horse riding
5. Fishing
6. Rock climbing or caving
7. Motorised watersports
8. Other watersports
9. Swimming outdoors
10. Snowsports
11. Field sports (shooting/hunting)
12. Air sports (hang gliding/ballooning)
13. Wildlife watching
14. Running
15. Sightseeing or visiting an attraction
16. Off-road driving or motorcycling
17. Picnicking (as a significant part of the activity)
18. Visiting children's playgrounds/taking children to play areas outdoors
19. Informal games (e.g. Frisbee or golf)
20. Other outdoor activities **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN OUTDOOR ACTIVITY NOT LISTED ABOVE IS MENTIONED**
21. None of these **[FIXED, EXCLUSIVE, GO TO Q16A]**

Q1B & 1C REMOVED

PART 3 VISITS IN THE LAST 4 WEEKS
--

ASK ALL WHO MENTION AT LEAST ONE ACTIVITY AT Q1A. OTHERS GO TO Q16A.

The next few questions are about visits to the outdoors you have made during the last 4 weeks.

Q2 Which of the following activities have you undertaken at least once during visits to the outdoors in the last 4 weeks?

CATI TO FILTER ACTIVITIES FROM Q1A. ROTATE ORDER

READ OUT LIST. CODE ACTIVITIES PARTICIPATED IN LAST 4 WEEKS

1. Walking
2. Road cycling
3. Off-road cycling or mountain biking
4. Horse riding
5. Fishing
6. Rock climbing or caving
7. Motorised watersports
8. Other watersports
9. Swimming outdoors
10. Snowsports
11. Field sports (shooting/hunting)
12. Air sports (hang gliding/ballooning)
13. Wildlife watching
14. Running
15. Sightseeing or visiting an attraction
16. Off-road driving or motorcycling
17. Picnicking (as a significant part of the activity)
18. Visiting children's playgrounds/taking children to play areas outdoors
19. Informal games (e.g. Frisbee or golf) —**SPECIFY**
20. Other outdoor activities **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IT AN OUTDOOR ACTIVITY NOT LISTED ABOVE**
21. None of these [**FIXED, EXCLUSIVE, GO TO Q16**]

ASK Q3A OF ALL WHO MENTION AT LEAST ONE ACTIVITY AT Q2. OTHERS GO TO Q16.

Q3a How many visits to the outdoors have you made in the last 4 weeks? You may have made more than one visit each day.

ENTER NUMBER OF VISITS

TYPE IN

DO NOT ALLOW 0. LOGIC CHECK. RANGE PERMITTED 0-500

Q3B REMOVED

PART 4 MOST RECENT VISIT

ASK ALL WHO MENTION AT LEAST ONE ACTIVITY AT Q2. OTHERS GO TO Q16.

I'd like to ask you some questions about your most recent visit to the outdoors in the last four weeks.

Q4a Which of the activities that you said you have done in the last 4 weeks, did you undertake on your most recent visit to the outdoors? You said that you did.....

CATI TO SHOW ACTIVITIES MENTIONED AT Q2, MULTICODE

READ OUT ACTIVITY/ACTIVITIES BELOW

Q4B REMOVED

ASK IF MORE THAN ONE CODE CHOSEN AT Q4A

Q4c And which would you say was the main activity you did on your most recent visit to the outdoors?

CATI TO SHOW ACTIVITIES MENTIONED AT Q4A

SINGLE CODE

Q5 During this visit, how long did you spend [INSERT ANSWER FROM Q4C OR Q4A IF Q4C NOT ASKED] in the outdoors?

TYPE IN HOURS AND MINS

Hrs

Mins

Don't know

Q6 was the effort you put into [INSERT ANSWER FROM Q4C OR Q4A IF Q4C NOT ASKED] enough to...?

a) make you raise your breathing rate?

SINGLE CODE

Yes

No

Don't know

ASK IF YES (CODE 1) AT Q6A. OTHERS GO TO Q7A

b) make you out of breath or sweat?

SINGLE CODE

Yes

No

Don't know

Q7a Which of the following, if any, best describes the types of places you visited on your most recent visit to the outdoors?

ROTATE ORDER. MULTICODE.

READ OUT LIST. MULTICODE

1. Woodland or forest

2. Farmland

3. Local park
4. Other local open space
5. Roadside pavement/track
6. Hills, mountains or moorland
7. River, lake or canal
8. Beach
9. Sea
10. Other coastline
11. Village
12. Other **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN OUTDOOR PLACE NOT LISTED ABOVE IS GIVEN**

ASK Q7B IF MORE THAN ONE PLACE SELECTED AT Q7A

Q7b Which of these was the main place you visited?

IF RESPONDENT IS UNSURE:

For example, the place you spent the longest amount of time in. SINGLE CODE. INSERT PLACES VISITED AT Q7A.

Q7C REMOVED

Q7D REMOVED

Q7e What is the name of the city, town or village or nearest city, town or village to the place you visited?

FOLLOW UP IF NECESSARY:

This may be the place you live in. If you visited more than one city, town or village provide the name of the place nearest your final destination.

NAME OF (NEAREST) TOWN OR VILLAGE.

(USES LIST OF TOWNS AND VILLAGES AS IN MENE SURVEY – UK WIDE LIST)

Q7f Now please provide the name of the actual place you visited, for example the park, wood or river.

ADD AS NECESSARY, IMPORTANT!:

If the place does not have a name, provide a nearby street name or landmarks which would help us to find it on a map.

If you were on a walk with no particular 'destination', tell us the location of the furthest away place reached.

If you visited more than one place, provide the name of the place that was your final destination e.g. furthest away.

TYPE IN PLACE VISITED

NB. RESPONSES MUST BE TYPED IN

(IF JUST TOWN OR VILLAGE NAME GIVEN PROBE FOR MORE DETAIL).
INTERVIEWER NOTE: IF RESPONDENT DOES NOT KNOW NAME OF PLACE VISITED
PROBE FOR AS MUCH DETAIL AS POSSIBLE TO ALLOW US TO IDENTIFY THE
LOCATION AFTER INTERVIEW E.G. ADDRESS, STREET NAME, NEARBY
LANDMARKS, ETC. – THE MORE DETAIL THE BETTER.

IF LOCATION NAME UNCLEAR, PLEASE DO CHECK SPELLING WITH RESPONDENT

Q8 Approximately how far, in miles, did you travel to reach this place? By that I mean the one way journey to the place visited.

IF RESPONDENT IS UNSURE, ASK FOR AN ESTIMATE.

IF ACTIVITY WAS UNDERTAKEN FROM HOME/WORKPLACE/OVERNIGHT
ACCOMMODATION WITH NO TRAVEL TO START POINT, TYPE IN 0.

IF PLACE VISITED WAS LESS THAN 1 MILE AWAY, TYPE IN 0.5.

TYPE IN NUMBER

ALLOW DK

ASK ALL WHO ENTER ≥ 0.5 AT Q8. OTHERS GO TO Q10.

Q9 What was the main mode of transport you used to reach this place on your most recent visit to the outdoors?

DO NOT PROMPT. DO NOT READ OUT. CODE FROM LIST. SINGLE CODE

IF NOT ON LIST CODE AS OTHER AND TYPE IN VERBATIM.

SINGLE CODE

1. Car/van

2. Train

3. Public bus/coach

4. Coach trip/private coach

5. Motorcycle/scooter

6. Bicycle/mountain bike

7. On foot/walking

8. On horseback

9. Boat (sail or motor)

10. Taxi

11. Other **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF A MODE OF TRANSPORT NOT LISTED ABOVE IS GIVEN**

12. Don't know **DO NOT READ OUT**

Q10 How long did your visit last altogether – that is from the time you left your home/workplace/overnight accommodation to when you returned?

TYPE IN HOURS AND MINS

Hrs

Mins

Don't know

Q11 Which of the following, if any, best describes who accompanied you when you went or did [INSERT ANSWER FROM Q4C OR Q4A IF Q4B NOT ASKED] on your most recent visit to the outdoors?

READ OUT LIST. CODE FROM LIST. MULTICODE OK. IF NOT ON LIST, CODE AS OTHER AND TYPE IN VERBATIM.

- 1.No one, I went on my own. **Go to Q14**
2. I went with my family
3. I went with my friends
4. I went as part of an organised group
5. Other **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN ANSWER WHICH FITS NONE OF THOSE LISTED ABOVE IS GIVEN**

ASK ALL WHO WENT WITH OTHERS AT Q11. OTHERS GO TO Q14.

Q12 And how many people, including yourself, were on this visit?

TYPE IN NUMBER

TYPE IN NUMBER

ASK ALL WHO WENT WITH OTHERS AT Q11. OTHERS GO TO Q14.

Q13 And how many, if any, of these people were aged under 16 years?

TYPE IN NUMBER OF CHILDREN

TYPE IN NUMBER

Don't know

Q14 Were you accompanied by a dog on your most recent visit to the outdoors?

Yes

No

Don't know

Q15 What reasons, if any, best describe why you made this visit to the outdoors to go [INSERT ANSWER FROM Q4C OR Q4A IF Q4B NOT ASKED]?

MULTICODE

DO NOT READ OUT. CODE ALL MENTIONED. IF NOT ON LIST, CODE AS OTHER AND TYPE IN VERBATIM

- 1.To spend time with family
2. To spend time with friends
3. To learn something about the outdoors
4. For fresh air or to enjoy pleasant weather
5. For health or exercise
6. For peace and quiet
7. To relax and unwind
8. To exercise your dog
9. To enjoy scenery and wildlife
- 10.To entertain children
- 11.To challenge myself
- 12.To achieve something
- 13.To enjoy/participate in my hobby
- 14.For pleasure/enjoyment
- 15.To get somewhere (e.g. walking to work/shops)

16. For other reasons **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN ANSWER WHICH FITS NONE OF THOSE LISTED ABOVE IS GIVEN**

17. Don't know [FIXED, EXCL] **DO NOT READ OUT**

Q15a During this visit , did you personally spend any money on any of the following items?

PROBE Any others?

RANDOM ORDER

READ OUT, CODE ALL MENTIONED

1. Food and drink
2. Petrol\diesel\LPG
3. Car parking
4. Bus\train\ferry fares
5. Hire of equipment
6. Purchase of equipment
7. Maps\guidebooks\leaflets
8. Gifts\souvenirs
9. Admission fees
10. Other items
11. Didn't spend any money [EXCLUSIVE, GO TO Q17]

ASK IF Q15A=1-10

Q15b How much did you spend on...

SHOW THOSE SELECTED AT Q15A.

TYPE IN AMOUNTS FOR EACH AMOUNTS TO BE RECORDED IN POUNDS AND PENCE

1. Food and drink
2. Petrol\diesel\LPG
3. Car parking
4. Bus\train\ferry fares
5. Hire of equipment
6. Purchase of equipment
7. Maps\guidebooks\leaflets
8. Gifts\souvenirs
9. Admission fees
10. Other items

PART 5 GENERAL QUESTIONS

ASK ALL WHO HAVE MADE NO VISITS TO THE OUTDOORS IN THE LAST FOUR WEEKS (CODE 21, 'NONE OF THESE' AT Q2)

Q16. For what reasons, if any, have you not made any visits to the outdoors in the last four weeks?

MULTICODE

DO NOT READ OUT. CODE ALL MENTIONED. IF NOT ON LIST, CODE AS OTHER AND WRITE IN VERBATIM.

1. Always too busy / lack of time
2. No-one to look after matters at home while I am away
3. Too difficult with children
4. Too difficult with elderly
5. Too difficult with disabled
6. Bad / poor weather
7. Physical disability
8. Pregnant
9. Old age
10. Other health reason
11. Lack of information on where to go / Don't know where to go
12. Lack of suitable places to go
13. Prefer to go to other places
14. Prefer to do other leisure activities
15. Wouldn't enjoy it
16. Prevented or discouraged by land owners / managers
17. Nervous or uneasy about what might happen (eg Personal safety, getting lost)
18. Not enough money / can't afford it
19. No-one to go with
20. Don't feel like I fit in / belong / am welcome
21. Lack of suitable means of transport / getting there
22. Dislike travelling
23. Not convenient
24. Not interested
25. No particular reason
26. Other **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN ANSWER WHICH FITS NONE OF THOSE LISTED ABOVE IS GIVEN**
27. Don't know – **[EXCLUSIVE] DO NOT READ OUT**

ASK ALL WHO HAVE MADE NO VISITS TO THE OUTDOORS IN THE LAST 12 MONTHS (CODE 21, 'NONE OF THESE' AT Q1D)

Q16a. For what reasons, if any, have you not made any visits to the outdoors in the last 12 months?

MULTICODE

DO NOT READ OUT. CODE ALL MENTIONED. IF NOT ON LIST, CODE AS OTHER AND WRITE IN VERBATIM.

1. Always too busy / lack of time
2. No-one to look after matters at home while I am away
3. Too difficult with children
4. Too difficult with elderly
5. Too difficult with disabled
6. Bad / poor weather
7. Physical disability
8. Pregnant
9. Old age
10. Other health reason

11. Lack of information on where to go / Don't know where to go
12. Lack of suitable places to go
13. Prefer to go to other places
14. Prefer to do other leisure activities
15. Wouldn't enjoy it
16. Prevented or discouraged by land owners / managers
17. Nervous or uneasy about what might happen (e.g. Personal safety, getting lost)
18. Not enough money / can't afford it
19. No-one to go with
20. Don't feel like I fit in / belong / am welcome
21. Lack of suitable means of transport / getting there
22. Dislike travelling
23. Not convenient
24. Not interested
25. No particular reason
26. Other **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN ANSWER WHICH FITS NONE OF THOSE LISTED ABOVE IS GIVEN**
27. Don't know – **[EXCLUSIVE] DO NOT READ OUT**

ASK ALL

**Q17. Would you like to visit the outdoors more often than you do at the moment?
SINGLE CODE**

Yes

No

Don't know

ASK ALL

Q18. Which activities, if any, would you like to do, or do more often than you do at the moment in the outdoors?

MULTICODE

DO NOT READ OUT BUT CODE ANSWERS APPROPRIATELY. IF NOT ON LIST, CODE OTHER AND TYPE IN VERBATIM.

1. Walking
2. Road cycling
3. Off-road cycling or mountain biking
4. Horse riding
5. Fishing
6. Rock climbing or caving
7. Motorised watersports
8. Other watersports
9. Swimming outdoors
10. Snowsports
11. Field sports (shooting / hunting)
12. Air sports (hang gliding / ballooning)
13. Wildlife watching
14. Running
15. Sightseeing or visiting an attraction
16. Off-road driving or motorcycling

17. Picnicking (as a significant part of the activity)
18. Visiting children's playgrounds / taking children to play areas outdoors
19. Informal games (e.g. Frisbee or golf)
20. Other outdoor activities **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN ANSWER WHICH FITS NONE OF THOSE LISTED ABOVE IS GIVEN**
21. None of these – **DO NOT READ OUT**
22. Don't know – **[EXCLUSIVE] DO NOT READ OUT**

ASK ALL

Q19 What, if anything, has stopped you from taking part in these activities or doing these activities more often during the last 12 months?

MULTICODE

DO NOT READ OUT BUT CODE ANSWERS APPROPRIATELY. IF NOT ON LIST, CODE OTHER AND TYPE IN VERBATIM.

1. Always too busy / lack of time
2. No-one to look after matters at home while I am away
3. Too difficult with children
4. Too difficult with elderly
5. Too difficult with disabled
6. Bad / poor weather
7. Physical disability
8. Pregnant
9. Old age
10. Other health reason
11. Lack of information on where to go / Don't know where to go
12. Lack of suitable places to go
13. Prefer to go to other places
14. Prefer to do other leisure activities
15. Wouldn't enjoy it
16. Prevented or discouraged by land owners / managers
17. Nervous or uneasy about what might happen (eg Personal safety, getting lost)
18. Not enough money / can't afford it
19. No-one to go with
20. Don't feel like I fit in / belong / am welcome
21. Lack of suitable means of transport / getting there
22. Dislike travelling
23. Not convenient
24. Not interested
25. No particular reason **[EXCLUSIVE]**
26. Other **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN ANSWER WHICH FITS NONE OF THOSE LISTED ABOVE IS GIVEN**
28. Don't know **[EXCLUSIVE] DO NOT READ OUT**

IF RESPONDENT MADE NO VISITS TO OUTDOORS IN LAST 12 MONTHS (Q1A = CODE 21, 'NONE OF THESE' AT Q1D) SKIP TO Q21

Q20 Next, thinking again about the outdoor leisure visits you have taken in the last 12 months, which of the following places, if any, have you visited at least once? ROTATE ORDER. MULTICODE.

READ OUT LIST. CODE PLACES VISITED IN LAST 12 MONTHS

1. Woodland or forest
2. Farmland
3. Local park
4. Other local open space
5. Roadside pavement/track
6. Hills, mountains or moorland
7. River, lake or canal
8. Beach
9. Sea
10. Other coastline
11. Village
12. Other **SPECIFY - PROBE FURTHER AND USE EXISTING CODES WHEREVER POSSIBLE – ONLY INPUT IF AN ANSWER WHICH FITS NONE OF THOSE LISTED ABOVE IS GIVEN**
13. None of these [**EXCLUSIVE**]

ASK ALL

Q21 Thinking now about the future, which types of outdoor places, if any, would you like to visit or visit more often than you do at the moment?

DO NOT READ OUT BUT CODE ANSWERS APPROPRIATELY. IF NOT ON LIST, CODE OTHER AND TYPE IN VERBATIM.

1. Woodland or forest
2. Farmland
3. Local park
4. Other local open space
5. Roadside pavement/track
6. Hills, mountains or moorland
7. River, lake or canal
8. Beach
9. Sea
10. Other coastline
11. Village
12. Historic sites (e.g. castles)
13. Gardens
14. Other **SPECIFY - PROBE FURTHER AND TRY TO USE EXISTING CODES WHEREVER POSSIBLE. IF REQUIRED READ OPTIONS TO SEE WHICH BEST FITS THE TYPE(S) OF PLACE THE RESPONDENT IS THINKING OF.**
15. None of these [**EXCLUSIVE**]

READ OUT

I'd now like to talk to you briefly about nature and biodiversity.

Biodiversity is the term used to describe the variety of all life on earth, this includes all species of animals and plants.

ASK ALL

22a. Thinking about biodiversity, in your opinion, do you think there has been a change in the variety of species in Wales?

READ OUT, SINGLE CODE

1. Yes, there has been an increase
2. Yes, there has been a decrease
3. There has been no change
4. Don't know

ASK ALL

22b. And do you think there will be a change in the variety of species in the future in Wales?

READ OUT, SINGLE CODE

1. Yes, there will be an increase
2. Yes, there will be a decrease
3. There will be no change
4. Don't know

ASK ALL

23. And generally, how concerned are you about any changes, past or future, to the variety of species in Wales? Please use the scale of 1 to 5, where 5 is very concerned and 1 is not at all concerned.

SINGLE CODE

- 5 – Very concerned
4
3
2
1 – Not at all concerned

ASK ALL

24. Finally, can I ask which of the following activities you have done at least once in the last 12 months to help protect the environment and nature?

READ OUT, MULTICODE, ROTATE

1. Recycled
2. Bought eco-friendly products
3. Bought local food
4. Walked or cycled rather than use the car

5. Reduced your home energy use (energy saving light bulbs, switching off appliances etc)
6. Gardened for wildlife (including bird feeding)
7. Been a member of an environmental, wildlife, or conservation group (includes paid membership of national organisations such as RSPB etc)
8. Actively volunteered with a project or organisation to help protect the environment or wildlife
9. Signed a conservation petition or participated in a conservation campaign (online or other)
- 10. None of these [EXC, DO NOT READ OUT]**

PART 6 DEMOGRAPHICS

I'd like to finish by asking you a few questions about you and your household.

D1. Gender

DO NOT READ OUT. CODE GENDER.

- Male
- Female

D2. How old are you?

TYPE IN

ENTER YEARS OF AGE

- Refused

[ASK D3 IF D2 = REFUSED]

D3. Then can you tell me which age band you fall into?

READ OUT LIST. SINGLE CODE.

SINGLE CODE.

- 16 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 to 84
- 85+
- Refused

D4. Which ethnic group do you consider yourself to belong to?

DO NOT READ OUT. SINGLE CODE

SINGLE CODE.

- White
- Mixed
- Asian, Asian Welsh or Asian British
- Black, Black Welsh or Black British
- Chinese or other ethnic group

Refused

IF 1 (WHITE) ASK:

And which of these ethnic groups do you consider you belong to?

IF RESPONDENTS SAYS 'ENGLAND OR ENGLISH', 'SCOTLAND OR SCOTTISH' OR ANY PART OF THESE COUNTRIES E.G. CORNWALL, BRISTOL ETC, CODE AS 'OTHER BRITISH'.

**IF RESPONDENT WAYS 'WALES OR WELSH, CODE AS WHITE – WELSH.
READ OUT**

Welsh

Other British

Irish

Any other white background – **SPECIFY**

D5. What is the highest qualification you have obtained up to now?

DO NOT READ OUT. USE EXAMPLES TO CODE INTO APPROPRIATE CATEGORY.

PROBE FOR AS MUCH DETAIL

SINGLE CODE.

Not yet finished school – no qualifications

Never went to school

Higher Education & professional/vocational equivalents

Degree or Degree equivalent, and above

Higher degree and postgraduate qualifications

First degree (including B.Ed.)

Postgraduate Diplomas and Certificates (including PGCE)

Professional qualifications at degree level e.g. graduate member of professional institute, chartered accountant or surveyor

NVQ or SVQ level 4 or 5

Other Higher Education below degree level

Diplomas in higher education & other higher education qualifications

HNC, HND, Higher level BTEC

Teaching qualifications for schools or further education (below Degree level standard)

Nursing, or other medical qualifications not covered above (below Degree level standard)

RSA higher diploma

A levels, vocational level 3 & equivalents

A level or equivalent

AS level

SCE Higher, Scottish Certificate Sixth Year Studies or equivalent

NVQ or SVQ level 3

GNVQ Advanced or GSVQ level 3

OND, ONC, BTEC National, SCOTVEC National Certificate

City & Guilds advanced craft, Part III (& other names)

RSA advanced diploma

Trade Apprenticeships

GCSE/O Level grade A*-C (5 or more), vocational level 2 & equivalents

NVQ or SVQ level 2, GNVQ intermediate or GSVQ level 2

RSA Diploma, City & Guilds Craft or Part II (& other names)

BTEC, SCOTVEC first or general diploma

Et level or GCSE grade A-C, SCE Standard or Ordinary grades 1-3

GCSE/O Level grade (less than 5 A*-C), other qualifications at level 1 and below

NVQ or SVQ level 1, GNVQ Foundation level, GSVQ level 1

GCSE or O level below grade C, SCE Standard or Ordinary below grade 3

CSE below grade 1, BTEC, SCOTVEC first or general certificate

SCOTVEC modules, RSA Stage I, II, or III, City and Guilds part 1 Junior certificate

Other qualifications – **SPECIFY**

Other vocational or professional or foreign qualifications

No qualifications

D6. Is there a car or van normally available for use by you or any members of your household? Include any provided by employers if normally available for private use by you or members of household

Yes

No

ASK IF D6 = 1

D7. Is there a bicycle normally available for use by you?

SINGLE CODE

Yes

No

D8. Do you, or another member of your household currently own or care for a dog?

SINGLE CODE

Yes

No

D9. Do you have a long-standing illness, disability or infirmity? By longstanding I mean anything that has troubled you over a long period of time or that is likely to affect you over a period of time.

Yes

No

ASK D10 IF D9 = YES

D10. Does this illness or disability limit your activities in any way?

Yes

No

ASK ALL

D11. Do you care for, or help to care for, a relative or friend who has a long term limiting illness or disability, including problems due to old age?

SINGLE CODE

Yes

No

D12. Do you have any children under the age of 16, for whose care and/or support you are responsible?

SINGLE CODE

Yes

No

D13. What is your current working status?

SINGLE CODE MAIN STATUS

DO NOT READ OUT BUT PROMPT FROM LIST AS REQUIRED

- 1.Working full-time (30+ hours per week)
- 2.Working part-time (9 to 29 hours per week)
- 3.Unemployed – less than 12 months
- 4.Unemployed (long term) – more than 12 months
- 5.Not working – retired
- 6.Not working – looking after house/children
- 7.Not working – long term sick or disabled
- 8.Student – in full-time education
- 9.Student – in part-time education
- 10.Other
- 11.Refused

D14A, D15A, D15B, D15C, D15D, D15E, D15F, D16 ALL REMOVED

ASK ALL

D16a. Which of these best describes the type of job of the Chief Income Earner in your household, or if that person is retired, the position they most recently held?

SINGLE CODE

READ OUT

- 1: Senior managerial/administrative/professional
- 2: Intermediate managerial/administrative/professional
- 3: Supervisor/clerical/junior managerial/administrative/professional
- 4: Skilled manual worker
- 5: Semi-skilled or unskilled manual worker
- 6: Student
- 7: Retired
- 8: Homemaker or unpaid carer
- 9: Other non working
- 10: Don't know/prefer not to say

INTERVIEWER NOTE – CHECK AGAINST JOBS BELOW, PROMPT IF NEEDS BE

1. Senior managerial/administrative/professional

(e.g. established doctor, solicitor, board director in Large organisation (200+ employees), top level civil servant/public service employee, headmaster/mistress

2. Intermediate managerial/administrative/professional

(e.g. Doctors/solicitors under 3 years qualified, teacher, Board director of small organisation (200+ employees), middle manager in large organisation (200+ employees), principal officer in civil service/local government).

3. Supervisor/clerical/junior managerial/administrative/professional

(e.g. office worker, trainee doctor/solicitor/teacher, foreman with 25+ employees, sales person)

4. Skilled manual worker

(e.g. skilled bricklayer, carpenter, plumber, painter, bus/ambulance driver, HGV driver, teaching assistant).

5. Semi-skilled or unskilled manual worker

(e.g. manual jobs that don't require special training/qualifications, apprentices to be skilled traders, caretaker, cleaner, nursery school assistant, park keeper, non-HGV driver, shop assistant).

ASK ALL

D17. We want to know if income affects people's ability to participate in various leisure activities. Is your total household income, that is income from all sources, before tax and other deductions above or below £26,000?

IF RESPONDENT SAYS HIGHER, ASK WHETHER INCOME IS ABOVE OR BELOW £42,000 THEN READ OUT REMAINING POSSIBLE INCOME BANDS.

IF RESPONDENT SAYS LOWER, THEN ASKED WHETHER INCOME IS ABOVE OR BELOW £15,600 THEN READ OUT REMAINING POSSIBLE INCOME BANDS.

SINGLE CODE

1. Up to £5,199
2. £5,200 to £10,399
3. £10,400 to £15,599

4. £15,600 to £20,799
5. £20,800 to £25,999

6. £26,000 to £31,199
7. £31,200 to £36,399
8. £36,400 to £41,999

9. £42,000 to £45,999
10. £46,000 to £49,999
11. £50,000 to £79,999
12. £80,000 to £99,999
13. £100,000 or more
14. Refused
15. Don't know

S2 Can I take your full postcode? We will only use this information to look at the geographical spread of results.

Yes

No **THANK AND CLOSE**

PART 7 RECONTACT QUESTIONS

RC1. Would you be willing to be re-contacted by telephone at some point in the future, regarding your visits to the outdoors, by National Resources Wales or a research company working on their behalf?

Yes

No

ASK RC2 IF RC1 = YES

RC2. Can I please ask for your name?

TYPE IN NAME

ENTER NAME

Thank you on behalf of TNS, Natural Resources Wales. If you have any queries about the survey please call Tim Gittins at TNS. I can also give you the Market Research Society number – they can provide confirmation that we are a genuine market research company.



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Published by:
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29 Newport Road
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