



## Welsh Outdoor Recreation Survey: 2011 Results and 2008 / 2011 Comparison

### First Release: Headline results

This publication presents summary results from the 2011 Welsh Outdoor Recreation Survey commissioned jointly by the Countryside Council for Wales and Forestry Commission Wales. It also compares the data between the 2008 and 2011 surveys. Differences between 2008 and 2011 are only shown if the change is statistically significant.

A total of 6,393 telephone interviews were carried out by TNS between January 2011 and January 2012 with adults (aged 16 years or over) living in Wales, stratified by the 6 Spatial Plan areas. Initial headline results are presented below. The 2008 Welsh Outdoor Recreation Survey involved 6,045 interviews using a similar telephone interviewing approach.

The findings represent the responses of residents of Wales on:

- Their use of the outdoors for informal recreation
- Places visited and activities undertaken
- Motivations for using the outdoors
- Barriers to visiting the outdoors
- Frequency, duration and intensity of activity
- The 'latent demand' for outdoor recreation.

### Key Findings:

- Just over a quarter of adults (27%) visited the outdoors "frequently", based on an average of 21 visits or more in the last 4 weeks. There was no significant difference in frequency of participation between 2008 and 2011. The majority (95%) of the adult population in Wales had visited the outdoors at least once in the last 12 months. There was no significant difference in the overall percentage of the population who visited the outdoors between 2008 and 2011.
- Around seven in ten had undertaken walking on their most recent visit to the outdoors in the last 4 weeks (73%). Other activities undertaken included wildlife watching (17%), taking children to playgrounds or other outdoor play areas (15%) and sightseeing or visiting an attraction (13%).

- Between 2008 and 2011, there were significant increases in the proportions undertaking road cycling, wildlife watching, visiting playgrounds and informal games on visits, both those taken in the last 12 months and those taken in the last 4 weeks.
- Woodlands/forests were the most frequently visited main destination in 2011 (18%), followed by local parks (12%), hills/ mountains/ moorland (11%) and beaches (11%). Significant increases in the proportion of visits taken to woodlands/forests and beaches, and significant decreases in visits to local parks and roadside pavements/ tracks were recorded between 2008 and 2011.
- Health and exercise (26%) and/or exercising a dog (25%) were the most frequently mentioned motivations in 2011, as they were in 2008 (36% and 26% respectively).
- There was a significant increase in the use of a car as the main mode of transport (55% in 2011) and a significant decrease in walking to the place visited (35% in 2011). However, there was no significant increase in the average distance travelled.
- 46% of visits were made with family members, a significant increase from 2008. However, there was no change in the proportion of visits made by groups with no children (75% in 2008 to 72% in 2011).
- 60% of adults would like to visit the outdoors more often, which represents no significant difference compared to the level of latent demand expressed in 2008. However, there were differences in some of the barriers to participating more, with significant decreases in those who said they were 'Too Busy' (32% in 2011) or cited 'Poor weather' (11%) and/or 'Old Age' (2%).

## **Section A: Respondent Information**

Results presented in this section should be interpreted as the proportion of the population, as data collected through the survey have been weighted to be representative of the Welsh adult population.

### **1. Visits to the Outdoors**

- The proportion of those resident in Wales who had visited the outdoors at least once in the last 12 months (based on a very broad definition of places and activities) did not differ significantly in 2011 (95%) from that recorded in the 2008 survey (94%).

- Equal proportions of adults visited the outdoors at least once between the months of April and September (97% in both surveys), with similar proportions having done so between October and March (93% in 2008 and 92% in 2011). The frequency of visit taking was also very similar between the two surveys for both the summer and winter periods.

- Almost nine out of ten adults in Wales had visited the outdoors within the last four weeks in both surveys (86% in 2008, 88% in 2011). The mean number of visits taken over the 4 week period amongst those who took any visits was 17 in 2011.

- In the last 12 months, almost four-fifths had taken an outdoor visit to a village (79%), while around three-quarters had visited a beach and/or a local park (76%). This question was not asked in 2008, therefore, no comparative data is available.

## 2. Activities Undertaken

- Walking was the most frequently undertaken activity on an outdoor visit in the last 12 months in 2011 (84%), followed by sightseeing or visiting an attraction (47%) and taking children to a playground or other outdoor play area (38%).

- The largest significant increases for specific activities undertaken in the last 12 months were recorded for informal games (22% in 2008 to 39% in 2011), while a significant increase from 31% to 38% was recorded for wildlife watching and a significant increase from 43% to 49% for visiting children's playgrounds or other outdoor play areas. Significant increases were also found in both road cycling (from 21% to 26%) and off-road cycling (from 16% to 20%).

- The popularity of walking during an outdoor visit was evident in 2011, with around seven in ten having undertaken this on their most recent visit to the outdoors (73%). Other activities undertaken by smaller proportions of those visiting the outdoors in the last 4 weeks included wildlife watching (17%), taking children to playgrounds or other outdoor play areas (15%) and sightseeing or visiting an attraction (13%).

- Between 2008 and 2011, significantly higher proportions had undertaken sightseeing or visiting an attraction (40% in 2008 compared to 47% in 2011), visiting children's playgrounds (31% in 2008 compared to 38% in 2011) and wildlife watching (23% in 2008 compared to 32% in 2011) on an outdoor visit in the last 4 weeks.

## 3. Barriers to Participation

- The main barriers cited by those who had not participated in any activity in the last 12 months were: physical disability (29%) and other health reasons (27%).

- Around three in ten of those who had not visited in the most recent four weeks cited being busy / a lack of time (31%) and health reasons other than a long term illness or disability (19%).

## 4. Latent Demand

- In 2011, three in five adults resident in Wales (60%) indicated that they would like to visit the outdoors more often than they currently do, the same proportion as recorded in the 2008 survey. However, there was a significant decrease in the proportion who stated that they would like to do more walking (from 34% in 2008 to 20% in 2011).

- In 2011, around a quarter of adults resident in Wales indicated that they would like to visit a beach more often than they currently do (26%), while 17% would like to visit hills, mountains and moorland more often and 13% a woodland or forest.

## Section B: Visit Information

Respondents were asked for detailed information on their most recent visit to the outdoors. Data drawn from these questions have been weighted by the number of visits made by the respondent in the last 4 weeks. Results from the following section should therefore be interpreted as the proportion of visits taken by the population rather than the proportion of the population, thus providing a representative view of trips taken to the outdoors by the Welsh adult population during both 2008 and 2011.

### 1. Activities

- The activity most often undertaken on visits to the outdoors was walking (73%), as shown in the table below. The next most commonly undertaken activities were wildlife watching (17%), visiting playgrounds (15%) and sightseeing/ visiting an attraction (13%).

- Between 2008 and 2011, there was an increase in the proportions of visits involving a number of activities – most notably wildlife watching (11% in 2008 to 17% in 2011) and visiting children’s playgrounds (11% to 15%).

#### All activities undertaken on most recent visit to the outdoors

	Year	
	2008	2011
<i>Unweighted base</i>	5,273	5,626
Walking	72%	73%
Wildlife watching	11%	<b>17%</b>
Visiting children’s playgrounds	11%	<b>15%</b>
Sightseeing/ visiting an attraction	10%	<b>13%</b>
Running	6%	<b>9%</b>
Informal games	5%	<b>8%</b>
Picnicking	4%	<b>7%</b>
Road cycling	3%	4%
Off-road cycling/ mountain biking	3%	4%
Horse riding	2%	3%
Any watersports	1%	<b>3%</b>
Fishing	2%	2%
Fieldsports	1%	<b>2%</b>
Swimming outdoors	1%	<b>2%</b>
Off road driving/ motorcycling	2%	2%
Rock climbing/ caving	<0.5%	1%
Horse riding	2%	3%

Note: Statistically significant variations are highlighted

## 2. Main Place Visited

- As shown below, between 2008 and 2011, the proportion of visits where the main place visited was a woodland/forest (18% in 2011) or a beach (11% in 2011) increased significantly while the proportion where the main place visited was a local park (12% in 2011) or roadside pavement/ track (9% in 2011) decreased.

Main place visited on most recent visit 2008 & 2011 (%)

	Year	
	2008	2011
<i>Unweighted base</i>	5,273	5,626
Woodland/ forest	14%	<b>18%</b>
Local park	<b>15%</b>	12%
Hills/ mountains/ moorland	11%	11%
Beach	7%	<b>11%</b>
Farmland	8%	10%
Roadside pavement/ track	<b>12%</b>	9%
Other local open space	8%	8%
River/ lake/ canal	8%	8%
Village	5%	5%
Other coastline	6%	5%
Sea	2%	2%

Note: Statistically significant variations are highlighted

## 3. Travel

- Over two-fifths of visits to the outdoors involved travel of less than a mile (46% respectively), whilst over three quarters involved travelling 5 miles or less (78%).

- Comparing the two survey years, a significantly higher proportion of visits involved travel by car or van (44% in 2008 and 55% in 2011) while a significantly lower proportion involved travelling on foot (46% and 35% respectively).

## 4. Duration of Visit

- Four in ten visits taken in the last 4 weeks in 2011 were under 2 hours in duration (40%) however, an equal proportion lasted for 3 hours or more. The mean visit duration in 2011 was 4 hours and 26 minutes, less than the average in 2008 (5 hours and 18 minutes).

## 5. Party Composition

- Over a third of visits in both 2008 and 2011 were taken alone (39% and 36% respectively). A higher proportion of visits were taken with family in 2011 (41% in 2008 compared to 46% in 2011). Children were present in the party in 28% of all visits in 2011, a similar proportion to 2008 (25%).

## 5. Motivations for visiting outdoors

- In 2011, health or exercise (26%), exercising a dog (25%), pleasure and enjoyment (16%) and to enjoy fresh air or good weather (16%) were the most frequently given motivations for visiting the outdoors.

- Health or exercise and exercising a dog were also the most frequently mentioned motivations in 2008 (36% and 26% respectively). All of the motivations were selected by higher proportions of respondents in 2008 than in 2011. This was particularly the case for participating in a hobby, where the proportion of visits allocated to this motivation fell significantly from 20% in 2008 to 8% in 2011.

However it should be noted that although respondents were not prompted with answer options, the addition of two new answer codes in 2011 ('for pleasure/enjoyment' and 'to get somewhere') may have impacted upon how the different motivations were recorded by the interviewer.

### Background

This release presents a summary of the headline results from the 2011 Welsh Outdoor Recreation Survey and a comparison with the relevant results from 2008. The 2011 fieldwork was undertaken between 17th January 2011 and 16<sup>th</sup> January 2012. This is the second survey of outdoor recreation undertaken of residents in Wales and follows a similar survey undertaken in 2008 (21<sup>st</sup> January 2008 to 21<sup>st</sup> January 2009<sup>1</sup>). The Countryside Council for Wales and Forestry Commission Wales plan to repeat this survey every three years.

### Data Collection

6,393 telephone interviews were carried out between January 2011 and January 2012 with adults aged 16 and over living in Wales. 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. The sample was stratified by Spatial Plan Area with at least 1000 interviews in each of Wales' six Spatial Planning Areas (SPAs).

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

In the 2008 survey, a total of 6,045 telephone interviews were carried out between January 2008 and January 2009

### Data Tables and Weighting

Tables presenting the full findings from the survey are available in pdf format along with this release.

[www.ccw.gov.uk/enjoying-the-country/welsh-outdoor-recreation-surve.aspx](http://www.ccw.gov.uk/enjoying-the-country/welsh-outdoor-recreation-surve.aspx)  
[www.forestry.gov.uk/forestry/infid-8wakt3](http://www.forestry.gov.uk/forestry/infid-8wakt3)

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<sup>1</sup> See <http://www.forestry.gov.uk/forestry/INFD-7VQEPA>

Results from questions 1 to 3 and questions 16 to 21 of the tables are weighted to the demographic characteristics of Wales (based on the latest population estimates available from ONS) to provide results representative of the Welsh population (section A of the release).

Results from questions 4 to 15 of the tables are based on information provided on respondents' most recent trip to the outdoors. Information collected from these questions has been weighted by the number of visits made in the last 4 weeks to provide information on the characteristics of visits to the outdoors made by the Welsh population during the survey period (section B of the release).

### **Official Statistics**

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