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UNIVERSITY OF GLOUCESTERSHIRE
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Countryside and Community Research Unit

Participants, Activities and Experiences: Understanding the Connections

FINAL REPORT
TO THE COUNTRYSIDE COUNCIL FOR WALES

By
Countryside and Community Research Unit
University of Gloucestershire

February 2007

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CRYNODEB GWEITHREDOL

1. Nod yr ymchwil oedd archwilio ymagweddau tuag at ddosbarthu a chategoreiddio cyfranogwyr mewn gweithgareddau hamdden yn yr awyr agored. Roedd amcanion y prosiect fel a ganlyn:
    a. cynnal adolygiad o ddeunydd darllen sy'n archwilio sut y mae cyfranogwyr, gweithgareddau a phrofiadau hamdden wedi'u dosbarthu a'u segmentu o'r blaen;
    b. canfod y dosbarthiadau a'r segmentiadau mwyaf priodol er mwyn creu sail ar gyfer archwilio a dilysu pellach;
    c. darparu system neu fatrics dosbarthu terfynol o ddewis gweithgareddau defnyddwyr sy'n cysylltu grwpiau defnyddwyr â gweithgareddau penodol a dewis brofiadau.

2. Cynhaliodd y prosiect adolygiad o ddeunydd darllen er mwyn archwilio ymagweddau gwahanol tuag at ddosbarthu a chategoreiddio cyfranogwyr mewn gweithgareddau hamdden yn yr awyr agored. Archwiliwyd tair ymagwedd gyffredinol at ddosbarthu gweithgareddau hamdden yn yr awyr agored yn seiliedig ar nodweddion y gweithgaredd, y cyfranogiad, a'r profiad.

3. Canfuwyd ystod eang o gategorïau ac ymagweddau dosbarthu mewn deunydd darllen o'r DU, Ewrop ac UDA. Mae categorïau ar sail nodweddion y 'gweithgaredd' a 'chyfranogiad' wedi'u defnyddio wrth gasglu data am gyfranogwyr hamdden, tra bo astudiaethau yn defnyddio categorïau ar sail 'profiad' wedi tueddu i fod yn fwy damcaniaethol, a data wedi'i gyfyngu i astudiaethau ymchwil llai.

4. Archwiliwyd dylanwadau rhyw a diwylliannol ar gyfranogiad mewn gweithgareddau hamdden yn yr awyr agored. Mae yna swm sylweddol o waith ar fenywod a hamdden, a chynhaliwyd llawer ohono yng Ngogledd America. Awgryma'r llenyddiaeth fod yna wahaniaethau rhwng profiadau dynion a menywod o weithgareddau hamdden yn yr awyr agored, yn seiliedig ar:
    a. Mynediad - mae cyfrifoldebau teuluol yn cyfyngu ar gyfranogiad gan fenywod
    b. Gall disgwyliadau cymdeithasol a hunan-ddelwedd gyfyngu ar y rhai a chwaraeir
    c. Gallai cymhellion dros gymryd rhan amrywio gan fod menywod yn gwerthfawrogi'r teimlad o gydweithio yn fwy, a'r cyfeillgarwch a ffurfir.

5. Archwiliwyd gwahaniaethau diwylliannol ac ethnig, er bod llawer o'r ymchwil a gynhaliwyd hyd yn hyn wedi bod yn ymwneud â pharciau cenedlaethol yng Ngogledd America ac efallai nad yw'n berthnasol i'r sefyllfa yng Nghymru. Awgryma'r ymchwil y gall gwahaniaethau diwylliannol fod yn bwysig. Mae'n well gan rai grwpiau ethnig gymryd rhan mewn gweithgareddau hamdden yn yr awyr agored mewn grwpiau mawr, tra bo ffactorau crefyddol yn bwysig i eraill wrth effeithio ar y math o weithgareddau hamdden a wneir. Mae gwaith a wneir gan y Rhwydwaith Amgylchedd Du yn awgrymu bod nifer o ffactorau yn cyfyngu ar ymweliadau gan grwpiau ethnig: mae'r rhain yn cynnwys diffyg cludiant

6. cyhoeddus, gwybodaeth ar gael yn Saesneg yn unig, a theimlo eu bod yn destun chwilfrydedd.

7. Mae tri llinyn o ddatblygiad damcaniaethol sydd wedi dylanwadu ar waith ymchwil yn y maes hwn dros y ddau neu dri degawd diwethaf:

    - Damcaniaeth arbenigaeth
    - Damcaniaeth am 'ddulliau profiad'
    - Damcaniaethau am 'lif' a pherfformiad brig

    Archwiliwyd pob un o'r meysydd damcaniaethol am ei ddylanwad ar ddatblygiad teipoleg cyfranogwyr mewn gweithgareddau hamdden.

8. Roedd asesu 14 o fforymau trafod electronig, er mwyn archwilio ystod o gwestiynau ynglŷn ag agweddau tuag at risg a chyffro mewn gweithgareddau hamdden yn yr awyr agored, elfennau penodol sy'n gwneud taith yn un pleserus, a ffactorau sy'n effeithio ar ddatblygiad amrywiaeth o weithgareddau yn yr awyr agored ym Mhrydain, hefyd yn rhan o'r ymchwil. Rhoddodd y fforymau trafod rywfaint o gefnogaeth i themâu allweddol yn neunydd darllen yr ymchwil. Yn benodol, awgrymodd y fforymau bod gwahanol ganfyddiadau o risg rhwng dynion a menywod, a gwahaniaethau sylweddol yn y mathau o brofiad a geisid. Ar un fforwm seiclo, er enghraifft, tueddodd y menywod i nodi mai bod yn rhan o grŵp, a gallu gwneud pethau yng nghwmni eraill oedd yn bwysig, ond roedd y dynion yn canolbwyntio ar heriau corfforol a thechnegol y gweithgaredd.

9. Dangosodd y fforymau trafod hefyd rywfaint o debygrwydd rhwng y mathau o brofiadau a geisid gan gyfranogwyr a oedd yn gwneud mathau gwahanol o weithgaredd hamdden. Er enghraifft, roedd tebygrwydd yn y profiadau a geisid gan feicwyr mynydd, dringwyr ac ogofwyr. Un o'r agweddau a ddaeth i'r amlwg yn gryf ym mhob gweithgaredd bron oedd pwysigrwydd agwedd gymdeithasol y gweithgareddau a gallu gwneud pethau yng nghwmni eraill.

10. Roedd rhai gwahaniaethau yn y profiadau a geisid rhwng rhai gweithgareddau: roedd yn well gan enweirwyr, er enghraifft, fod ar eu pen eu hunain ac roeddent am fod yn agos i natur; nododd marchogwyr bwysigrwydd y berthynas â'r ceffyl, a gallu gweld cefn gwlad o safbwynt gwahanol.

11. Mae'r ymchwil yn rhoi rhai rheolau cyffredinol ar gyfer categoreiddio cyfranogwyr mewn gweithgareddau hamdden yn yr awyr agored. Mae'r 'rheolau' hyn yn seiliedig ar gysyniadau arbenigaeth (wrth i gyfranogwyr mewn gweithgaredd ddod yn fwy medrus, mae'r profiadau a geisir yn tueddu i newid), ac ar 'ddulliau profiad' (mae pobl yn ceisio ystod o brofiadau gwahanol yn sgîl ymgymryd â gweithgaredd penodol). Mae dringo creigiau a chaiacio yn enghreifftiau o'r rheolau cyffredinol.

12. O ganlyniad i gyfraniad rhanddeiliaid mewn gweithdy a gynhaliwyd yng Ngogledd Cymru, gwnaed rhai newidiadau i'r damcaniaethau sylfaenol a'r rheolau cyffredinol a gyflwynwyd. Nodwyd bod categoreiddio cyfranogwyr ar sail arbenigaeth, neu ar 'ddulliau profiad' yn fwy cymhleth nag a awgrymwyd gan y damcaniaethau.

13. Ymddengys bod yr ymagwedd 'pyramid arbenigaeth' yn cynnig dull o gategoreiddio cyfranogwyr ar draws ystod eang o weithgareddau gwahanol yn yr awyr agored, a'i bod yn llwyddo i gynyddu dealltwriaeth o gymhellion dros gymryd rhan, a'r gwasanaethau sydd eu hangen. Mae'r 'pyramid arbenigaeth' yn cynnig dull o strwythuro dosbarthiad manylach o gyfranogwyr. Gellir cyfeirio ymchwil bellach tuag at nodi cyfranogwyr ar gamau gwahanol mewn gweithgaredd, ac archwilio'r cymhellion dros ymgymryd â mathau penodol o weithgaredd. Mae'r ymagwedd yn awgrymu tebygrwydd yn y profiadau a geisid ar draws sbectrwm eang o weithgareddau.

14. Mae'r ymagwedd 'ddulliau profiad' yn darparu dull mwy cymhleth a damcaniaethol o ddosbarthu cyfranogwyr mewn gweithgareddau hamdden yn yr awyr agored. Tra bo rhywfaint o dystiolaeth (o'r llenyddiaeth a'r fforymau electronig) bod cyfranogwyr mewn gweithgaredd yn yr awyr agored yn ceisio profiad penodol ar unrhyw adeg, mae'n anodd gwahanu'r dulliau profiad oddi wrth daith benodol. Ni ellir gwahanu'r boddhad a geir trwy ymgymryd â her gorfforol bob tro oddi wrth y profiad cymdeithasol, yn enwedig pan fo'r gweithgaredd yn gofyn am waith tîm agos (e.e. fel dringo creigiau). Mae angen archwilio'r arena ddamcaniaethol hon ymhellach cyn y gellir ei chymhwyso yn ymarferol i ddosbarthu cyfranogiad mewn gweithgareddau yn yr awyr agored.

15. Mae'r ymchwil yn datblygu'r cysyniad o 'byramid cyfranogiad' fel sail ddamcaniaethol ar gyfer dosbarthu cyfranogwyr mewn gweithgareddau hamdden yn yr awyr agored. Ceir pedwar math sylfaenol o gyfranogwr mewn unrhyw weithgaredd yn yr awyr agored: aelod cysllt, dechreuwr, cyflawnwr, a gwerthfawrogwr. Mae gan bob un anghenion penodol ac mae'n ceisio set wahanol o brofiadau yn sgîl ymgymryd â'r gweithgaredd. Bydd ymchwil empirig yng Nghymru yn sicrhau bod rheolwyr cefn gwlad yn deall yn well y profiadau a ddymunir gan gyfranogwyr hamdden a maint perthynol y pedwar math gwahanol o gyfranogwyr ar gyfer pob gweithgaredd yn yr awyr agored. Gall ymchwil ar sail yr ymagwedd hon hefyd daflu goleuni ar y galw posibl am ragor o weithgareddau hamdden yn yr awyr agored ymhlith grwpiau cymdeithasol nad ydynt yn defnyddio cefn gwlad ar hyn o bryd.

EXECUTIVE SUMMARY

1. The aim of the research was to explore approaches to the classification and categorisation of participants in outdoor recreation. The project objectives were as follows:
    a. undertake a literature review that examines how recreation participants, activities and experiences have previously been classified and segmented;
    b. identification of the most appropriate classifications and segmentations to form the basis for further exploration and validation;
    c. provision of a final classification system or matrix of users activity preferences that links user groups with specific activities and preferred experiences.

2. The project undertook a literature survey to explore different approaches to classifying and categorising participants in outdoor recreation activities. Three broad approaches to classifying outdoor recreation were examined based on characteristics of the activity, of participation, and of experience.

3. A wide range of categories and classification approaches were found in literature from the UK, Europe and the USA. Categories based on characteristics of the 'activity' and of 'participation' have been utilised in the collection of data on recreational participants, while studies using categories based on 'experience' tended to be more theoretical, and data limited to smaller research studies.

4. Gender and cultural influences on participation in outdoor recreation were explored. A considerable amount of work on women and leisure exists, much of it carried out in North America. The literature suggests that there are differences in the experience of outdoor recreation for men and women based on:
    a. Access - family responsibilities constrain participation by women
    b. Societal expectations and self-image may constrain involvement
    c. Motives for taking part might vary as women value more highly the feeling of working together, and the friendships formed.

5. Cultural and ethnic differences were examined although much of the research carried out to date has been in relation to national parks in North America and may not be relevant to the situation in Wales. The research does suggest cultural differences may be important, some ethnic groups prefer to take part in outdoor leisure activities in large groups, while for others religious factors are important in affecting the type of leisure activities undertaken. Work undertaken by the Black Environment Network suggests that a number of factors constraints visits by ethnic groups: these include lack of public transport, information being only available in English, and feelings of being the objects of curiosity.

6. There are three strands of theoretical development that have influenced research work in this area over the last two or three decades:
    i. Specialisation theory
    ii. Theory about 'modes of experience'
    iii. Theories about 'flow' and peak performance

   Each of the theoretical areas was explored for its influence on the development of typologies of recreation participants.

7. The research included accessing fourteen electronic discussion forums in order to explore a range of questions regarding attitudes towards risk and excitement in outdoor recreation, specific elements that make a trip enjoyable, and factors affecting development of a range of outdoor activities in Britain. The discussion forums provided some support for key themes in the research literature. Specifically the forums suggested there are different perceptions of risk between males and females, and significant differences in types of experience sought. On one cycling forum, for example, females tended to cite being part of a group, and being able to do things in the company of others as important, while males focused more on the physical and technical challenges of the activity.

8. The discussion forums also revealed some similarities between types of experience sought by participants engaged in different types of recreational activity. For example, there were similarities in experiences sought by mountain bikers, climbers and cavers. One aspect that came across strongly in nearly all activities was the importance of the social aspect of activities and being able to do things in the company of others.

9. There were some differences in the experiences sought between certain activities: anglers, for example, tended to prefer solitude and sought an experience close to nature; horse riders cited the importance of the relationship with the horse, and being able to see the countryside from a different perspective.

10. The research provides some 'rules of thumb' for categorising participants in outdoor recreation activities. These 'rules' are based on the concepts of specialisation (as participants in an activity become more skilled, the experiences that are sought tend to alter), and of 'modes of experience' (people seek a range of different experiences from engaging in a particular activity. The 'rules of thumb' are illustrated through application to rock climbing and kayaking.

11. Stakeholder engagement through a workshop held in North Wales led to some refinements of the basic theories and 'rules of thumb' presented. Categorisation of participants based on level of specialisation, or on 'mode of experience' were both viewed as more complex than theories suggested.

12. The 'specialisation pyramid' approach appears to offer a means of categorising participants across a wide range of different outdoor activities, and be capable of increasing understanding of motivations for participating, and the services required. The 'specialisation pyramid' offers a means to structure a more detailed classification of participants. Further research might be directed towards identifying participants at different stages in an activity, and exploring the

motivations for engaging in certain types of activity. The approach suggests similarities in the experiences sought across a broad spectrum of activities.

13. The ‘modes of experience’ approach provides a more complex and theoretical means of classifying participants in outdoor recreation. While there is some evidence (from the literature and the electronic forums) that participants in an outdoor activity seek a particular experience at any point in time, it is difficult to disentangle the modes of experience from a specific trip. The satisfaction sought from engaging in physical challenge cannot always be separated from the social experience, especially when the activity requires close team work (e.g. as in rock-climbing). This theoretical arena needs further exploration before it can be applied in a practical manner to classifying participation in outdoor activities.

14. The research develops the concept of a ‘participation pyramid’ as a theoretical basis for classifying participants in outdoor recreation activities. Four basic types of participant are found in any outdoor activity: affiliate, beginner, achiever, and appreciator. Each has specific needs and seeks a different set of experiences from engaging in the activity. Empirical research in Wales will provide countryside managers with a greater understanding of the experiences desired by recreational participants and the relative size of the four different participant types for each outdoor activity. Research based on this approach may also shed light on potential demand for increased outdoor recreation among social groups that currently do not access the countryside.

1. Review of Literature

This section examines how persons engaged in outdoor activities have been classified or segmented. It explores three broad approaches to classifying outdoor recreation based on:

- Characteristics of the activity
- Characteristics of participation includes demographic characteristics and market based studies looking at the socio-economic character of participants
- Characteristics of experience.

1.1 Characteristics of the activity

Outdoor recreation covers a large spectrum of activities, from those going for a walk or a picnic in the countryside, to those engaged in the pursuit of thrills through some 'extreme' activity such as tombstoning, white-water canoeing, or kite-surfing. A simple way to examine involvement in the range of outdoor activities is through exploration of the surveys carried out on different activities. One difficulty is the multiplicity of 'niche' activities within a broad form of recreation such as climbing, or cycling. These are often undertaken by relatively small groups of persons with high levels of skills, knowledge and sometimes require specialist equipment.

Shooting, for example, has been sub-divided (BASC, 2006) as follows:

- Clay pigeon shooting
- Deer management
- Game shooting (primarily pheasant, partridge and grouse)
- Pest control
- Rough shooting
- Target shooting
- Wildfowling

Climbing can be subdivided into 'sport' (climbing on indoor rock walls, competitions, or focusing on climbing specific lines despite failures and falls), and 'traditional' (climbing on quarries or natural crags and cliffs). The activity can also be broken down into sub-components based on the nature of the setting:

- Scrambling
- Bouldering
- Abseiling
- Gorge walking
- Sea level traversing
- rock climbing
- Ice climbing
- Mountaineering

Canoeing can be subdivided into flat water or moving water and sub-divided on the basis of type of equipment utilised:

- Open canoeing

- Kayaking
- Kayak racing (e.g. K1, K2)
- Playboating
- Endurance
- Surfing

Some individuals may concentrate their activity in one area, while others will engage in several activities on different occasions or at different times of the year. Surveys are not always accurate in their measures of persons undertaking such 'niche' activities.

Each broad recreational type tends to have both those that specialise in a sub-category of the activity and 'generalists' that will engage in a variety of sub-components. New categories, or niche activities are constantly being developed as those specialising in an activity seek new challenges, and/or new technology allows the development of equipment that extends the range of activity that can be undertaken. The development of plastic materials in boat construction, for example, has led to a range of kayak types specialised for river running, surfing, or playing in white water. The development of the windsurfer has led to new activities taking place in the coastal or inland water environment.

Typologies based on specialisms do not help to identify links between different recreational activities not why persons engage in them. At a broad level outdoor activities have been divided into 'hard' and 'soft' activities where the soft element refers to activities such as camping, walking and birdwatching, and the hard activities are those with a higher risk element and requiring the development of skills such as rock climbing and kayaking. Outdoor recreation has also been divided into 'adventure' and non-adventure' activities, while 'activity' holidays has developed as a new and rapidly growing market.

1.2 'Adventure' activity typologies

Several researchers have attempted to create typologies for 'adventure' activities based on the defining characteristics of an activity. Christiansen (1990), for example, developed a typology for 'adventure recreation' based on level of risk associated with the activity. This ranged from 'soft adventure' (e.g. camping, biking, hiking, flat water canoeing) to 'high-risk adventure' (e.g. rock climbing, Scuba diving, caving, white-water boating).

Sung et al. (2000) developed a typology of adventure travel activities from a marketing perspective based on the nature of activities undertaken:

- Soft nature
- Risk equipped
- Question marks
- Hard challenge
- Rugged nature
- Winter snow

Ewert (2000), in a similar fashion, highlighted a variety of approaches to characterising adventure experiences:

- Rugged recreation
- High adventure programming
- Challenge education

- Thrill sports
- Risk recreation
- Adventure recreation

Ewart defined the adventure experience as:

> "A self-initiated recreational activity, that usually involves a close interaction with the natural environment, structurally contains elements of perceived or real risk and danger, and has an uncertain outcome that can be influenced by the participant and/or circumstance".

According to Ewart the four key elements that separate adventure recreation from other recreational activities are:

- involvement with a natural environment
- elements of risk and danger
- uncertain outcome
- influenced by the participants or circumstance

This is similar to the approach taken by Christiansen with the added elements of the uncertain outcome and the level of influence by the participants (or external circumstances such as the weather) in the outcome.

Mintel have recently explored the outdoor recreation market in a series of studies based on surveys carried out in 2005. (Mintel 2006). A national survey of 1,992 adults aged 15+ indicated that the largest proportion of those engaged in an outdoor activity go either hiking or hill/fell walking (31% of the sample). The other activities with a significant proportion of the sample were water sports, fishing and motor based activities. In addition the study suggested that up to one third of the population would not want to participate in the list of activities in Table 1

Table 1: Participation in outdoor activities (2005)

Activity	Percent of Sample
Hiking/rambling	17%
Hill/fell walking	14%
Water sports (includes canoeing/rafting/wind-surfing/water skiing)	12%
fishing (trout/game/coarse/sea)	9
motor-based activities (includes scramble bikes, quads, 4x4, rally driving)	9
horse riding	6
sailing/motorboating	6
shooting (game/rough/clay/target)	5
climbing (rocks/walls/mountaineering)	4
have participated but not in last 3 yrs	16%
never participated and do not intend to participate	33%

In a study of activity holidays (Mintel, September 2005) defines target groups for activity holidays based on response to a set of attitudinal questions about activity holidays. The research produced the following categories:

Activity holiday fans (13% of sample)

- have the most positive attitudes towards activity holidays viewing them as good for improving skills, fitness and health, and good way to socialise and make new friends.

Pressure escapers (13%)

- view activity holidays a great way to escape pressures of everyday life.
- More likely to be men than women and in 20-34 yr age bracket

Active families (13%)

- think activity holidays ideal for families – though 21% concerned about cost
- more likely to be in 25-44 and 15-19 age brackets

Unwinders (17%)

- Prefer to go on relaxing holidays but 40% think good way to escape pressures of every day life,
- one third agree ideal for families.
- More women than men.

Apathetic (45%)

- low interest in activity holidays based on attitudinal questions
- higher numbers of old age groups and lower socio-economic groups

The research supports the large proportion of the population that may have no interest or very low interest in activity type holidays (45% in this sample).

Mintel (October 2005) have also surveyed those involved in what they have described as 'extreme' sports. Mintel divide extreme sports into five categories, which are described in Table 2.

Table 2: Classification of Extreme sports (Mintel, 2005)

Lifestyle extreme sports
Some of these are developed from 'street sports' and seen as hip and trendy sports to participate in. Defined by clothing, language and footwear as well as the activity itself. They are not extreme in sense of being dangerous to life but extreme in sense they are at the edge of the mainstream sports scene. It is also about lifestyle – living your life through the activity.

Watersports
Wakeboarding
Surfing
Boogie boarding
Windsurfing – includes slalom, course racing, freestyle and wave
all with their own events and comptetitions)
White water rafting
Kite-surfing
Canyoning
River bugs (individual inflatables)

Land-based
BMX/mountain biking
Mountaineering – can be broken down into many subcategories
Motocross
Skateboarding
Snowboarding
Extreme skiing
In-line skating
caving

Aerial
BASE jumping
Bungee jumping
Sky surfing
Hang gliding
Paragliding

Emerging

Not all of these activities necessarily take place in the countryside, some such as skateboarding, require hard smooth surfaces and tend to be confined to more urban areas. Emerging activities include 'gift experiences' where vouchers are sold on the internet for specific activities; extreme sports competitions and festivals, which are often aimed to bring together participants, spectators and sports goods manufacturers and retailers, and where music is an important part of the event.

The Mintel study suggested that skiing is most popular extreme sport on the list with 15% of the sample participating (N=1,971 adults aged 15+). Also popular were windsurfing (8% of the sample), mountaineering (7%); many of other activities recorded less than 3% of the sample. These 'extreme' sports tend to be dominated by men. The majority are in the 'under 25' and '25 – 44' age groups. Students and

those still studying have the highest participation level, which suggests that these are the core of participants in extreme sports (except for skiing and windsurfing which have wider spread). The highest level of participation is from those who view 'extreme' sports as "exciting and adventurous". Participants report that engagement in such activities is often accompanied by an adrenalin rush, with relief, and exhilaration of having faced one's fears. 'Exciting', 'adventurous' and 'frightening' were the most common adjectives associated with extreme sports. Mintel suggest that "…overcoming a sense of fear and learning new skills provide a real sense of achievement"; this provides a "feelgood factor" that is important.

Sung (2004), in a recent study of the travel behaviour of adventure travellers, notes that the driving forces of: a more active aging population, two-income families, childless couples, and increasing numbers of single adults; have led to changes in leisure activities and in demand for travel. She notes the increase in "special interest tourism", which she defines as 'the provision of customised leisure and recreational experiences driven by specific interests of individuals and groups'. Examples of special interest tourism are nature tourism, eco-tourism and adventure tourism.

Adventure travel is defined as "a trip or travel with the specific purpose of activity participation to explore a new experience, often involving perceived risk or controlled danger associated with personal challenges, in a natural environment or exotic outdoor setting".

Segmenting the market is viewed as important in order to allow marketers to focus their attentions on "customers with homogeneous characteristics or behaviours". This study attempted to classify adventure travellers in the USA on the basis of their demographic, socio-economic, and trip related characteristics. Sung used cluster analysis to create six identifiable groupings of consumer:

> General enthusiasts: 27% of sample respondents. Enthusiastic fans of adventure travel in general. Mainly male, with some college education, one quarter had children under 12 yrs. Take at least one adventure trip per year, prefer hard challenge or rugged nature rather than soft nature activities.
>
> Budget youngsters: 22% of respondents. Mainly young (19 to 34) and single, with relatively low income. Prefer to take trips with friends or family.
>
> Soft moderates: 9% Typical traveller would be female and middle aged. Well educated but low disposable income. Preferred soft nature type of activities such as camping, hiking, nature trips.
>
> Upper high naturalists: 14% of sample. Do not perceive risk or performance as being important for adventure travel. Mainly middle aged (35 – 54) and married. Generally high income earners, considerable number were female and like to travel with family and friends. Most likely to go to new or novel destinations.
>
> Family vacationers: 13% of sample. Not excited about adventure travel trips, prefer family orientated, likely to go to familiar destinations.

Active soloists: 14% of sample. Activity extremely important for this group. Considered motivation as being highly important (unlike the other groups) for adventure travel. Some preferred risk-equipped activities such as hang gliding or windsurfing. Tend not to have children under 12 yrs and are often single income earner in the household.

1.3 Who Participates in outdoor recreation in the UK?

Participation is a difficult question to answer in the UK as data is inconsistent and sparse for many activities. Where data exists on participation is often derives from small self-selected samples that may not reflect the characteristics of the underlying population engaged in the activity.

ACTIVITY	No. of participants	Age of participants	Gender of participants	Social class of participants	Ethnicity of participants
Shooting	480,000 UK 110,000 Wales	93% of shooters are male over the age of 40	93% of shooters are male over the age of 40	Core target for following magazines: Shooting Times – ABC1 Men Shooting Gazette – ABC1 Men Sporting Gun – BC1C2 Men 25+ The Field – ABC1	
Angling	1.1 million sea anglers 2.3 million coarse anglers 0.8 million game anglers	94% aged 15-24	75-94% male	6% of AB households, 5% C1C2 households and 4% DE households have a fishing member.	94% White 3% Asian
Nature/Bird Watching	>1,000,000 RSPB members	150,000 RSPB youth members			
Walking	12% of UK population (regularly) 10% of UK population (occasionally)	10% <25yrs 33% >55yrs	47% male 53% female	44% AB	
Running	8.6% of adult population in Great Britain engaged in	19.9% of 16-19 year olds; 18.2% of 20-24 year olds;	11.6% of male population engaged, 6% of female		

	running/jogging at some point in past 12 months (2002 General Household Survey)	17.7% of 25-29 year olds; 13.8% of 30-44 year olds; 4.6% of 45-59 year olds; 1% of 60-69 year olds; 0.2% 70+	population		
Fell running	Fell Runners Association has 4500 members				
Mountain Biking	IMBA est 5.5 million riders Mintel est 1.2% of UK population are regular riders = cir 0.5 million	'Regular trail mountain biker' – Males aged 18-30 & 31-45 (equally distributed)	New Zealand study – 85% male.	C1 primarily, then AB	
Off-road vehicle driving					
Horse Riding	2.4 million riders in Britain CCW Horseriding in Wales study (2003) estimated 23,000 horseriders resident in Wales and 0.34 million visitor riding occasions/year	Age profile of those 'interested in horse related activities': 4% 15-17 11% 18-24 17% 25-34 19% 35-44 15% 45-55 14% 55-65 19% 65%	49% female, 51% male split of those 'interested in horse related activities'	Social grade profile of those 'intereted in horse related activities': AB – 26% C1 – 28% C2DE – 46%	
Geocaching	5,400 participants in UK				
Trigpointing	882 contributing users				
Water sports	7.2% of 2003 study had engaged in some form of water sport in the past year. Estimated to be a minimum of 2.97 million people in England, Scotland and Wales	Majority in age bracket 16-34	Males twice as likely as females. 10.1% of males participated, 4.5% of females.	13% of AB participated 9.5% of C1 participated 4.1% of C2DE participated	

Canyoning					
Surfing	British Surfing Assoc estimate 0.5 million regular surfers		Approx 100,000 regular female surfers in UK.		
Kite Surfing	Kitesurfing Association estimate 7000 Kitesurfers in UK				
Caving	National Caving Association estimate 20,000 have some caving interest.				
Climbing	BMC has 64,000 members, but they estimate there are 150,000 active climbers 2006 Equity survey	Mean age in a survey was 29 Half of sample aged 25 – 44 yrs, only 1% under 18 yrs.	Study revealed gender split of 72% male, 28% female		English 81.3% Welsh 2.9% Non-white ethnic groups less than 2%
Mountain Boarding	All-terrain boarding assoc estimate 6000+ participants				
Kit Flying					
Motorsport	Around 800 registered motor clubs, and an estimated 100,000 competitors				
Outdoor pursuits	Sports Council Wales 2002/03 report on adult sports participation	Proportion of population: Angling 1.7% Game Shooting 0.2% Canoeing 0.3% Mountaineering 0.3% Horseriding 0.8% Caving 0.1% Sailing 0.3%	15% males, 6% females engaged in some form of outdoor pursuit in previous 4 weeks (excludes walking)		

1.4 Characteristics of participation

A large literature has explored the benefits of undertaking physical activity in the outdoors. Peacock, et al. (2006) note that some form of outdoor recreation, or exposure to nature, has been viewed as providing the following benefits:

- Health – physical and mental
- Psychological well-being
- Stress relief
- Education
- Confidence building
- Team building
- Leadership skills.

The notion of 'green exercise' in particular has been identified as important in improving people's health. All of these benefits may exist and must be considered as valid uses of the countryside but it is not clear whether they should be classified as 'recreation'. We would argue that persons engaged in adventure activity or outdoor activities for the purpose of developing leadership skills that might then be applied to their work, or undergoing an outward bound course as part of their education, are not engaged in recreation but are using such activities to achieve some other purpose. However, they can still be regarded as consumers of the countryside and of environmental and other services.

Plog (1977) attempted to associate the behaviour of tourists with personality traits. He divided people into 'psycho centrics' and 'allocentrics'. He then argued that psychocentrics were inward-looking people who tended to prefer the familiar and resorts which were already popular. Allocentric people he claimed were those who liked to take risks, they were more outward-looking and sought more adventurous holidays.

Earlier Cohen (1972) had classified tourists into four types:

- The organised mass tourist: buys a package holiday and prefers to travel with a large group;
- The individual mass tourist: buys a package that gives more flexibility and freedom (e.g. a fly-drive) but tend to stay on the beaten track;
- The explorer: makes own arrangements and sets out to avoid other tourists, but still want reasonably high level of comfort and security;
- The drifter: wants to become accepted as part of the local community, shuns all contact with the formal tourism industry.

He divided the broad class of tourists into a number of sub-sets based on the characteristics of activity undertaken:

- Thermalists (those visiting spas for health purposes)
- Students
- Pilgrims
- Old-country visitors (people visiting their ancestral 'homes')
- Conventioneers
- Business-travellers
- Tourist-employees (people who use their skills/job to travel – for example soldiers)
- Official sightseers (people engaging in visits while on official business)
- Vacationers

He also argued that the essential element of tourism is the pursuit of 'novelty and change' and differentiated between 'sightseers' and 'vacationers' on this basis.

Sightseers looked for novelty – for something new in each trip while vacationers sought change. Cohen summarised from this that sightseeing trips therefore tend to be non-recurrent for an individual while vacation trips tend to be recurrent. This difference led to two very different types of tourist, those who visited once to see the sights 'on a tour', and those who came back time and again to the same destination for a holiday. The two types create very different demands on local services.

Cohen (1979) later modified this approach by developing a five-group classification based on the type of experience sought:

- Recreational tourists – emphasis is on physical recreation
- Diversionary tourist – seeks ways of forgetting about everyday life
- Experiential tourist – looks for authentic experiences
- Experimental tourist – main desire is to be in contact with local people
- Existential tourist – wants to totally immerse themselves in the culture and lifestyles of their destination.

A similar approach has been taken by Smith (1989) who developed seven categories of tourist:

- Explorers – similar to anthropologists in their interests
- Elite tourists – experienced and frequent travellers
- Off-beat tourists – aim to get away from other tourists
- Unusual tourists – make side trips from organised tours in order to experience local culture
- Incipient mass-tourists – travel to established destinations
- Mass tourists – expect the same things they are used to at home
- Charter tourists – little or no interest in the destination itself, only concerned that the holiday provides entertainment, food and accommodation at the expected standard.

The problem remains that none of the typologies listed above avoids the problem of inclusiveness. The categories are not mutually exclusive. For Cohen this was not a problem, he accepted that any categorisation would be based on 'fuzzy' sets or unclear boundaries where individuals exhibited characteristics of more than one category or set. But it does create problems in that these are broad generalisations; individuals cannot easily be assigned to a specific category and may move from one category to another over time or even in the course of a single visit.

Swarbrooke and Horner (1999) note that much of the work undertaken in developing typologies has been based on looking at individual's preference for either destinations, activities while on holiday, or package holidays compared to independent travel. They note that many of the typologies are based on stereotypes and do not allow for the fact that individuals can move from one category to another over time in response to changes in health, age, income, leisure time, and family commitments. Many typologies are based on small samples, do not deal with the difference between expressed preferences and actual behaviour, and often ignore the fact that as people become more experienced travellers, they may move from one category to another.

A more recent approach to classifying tourists, travellers and recreationalists has been the psychographic approach, which is based on the assumption that a person's lifestyle, attitudes, opinions and personality will determine their behaviour as consumers. This approach has led to targeted marketing within the travel industry (e.g. eco-tourism, activity holidays), and created a range of typologies for classifying people based on behaviour. These include behaviours based on purchasing (regular

or 'once-in-a-lifetime') benefits sought (e.g. excitement, good service), and attitudes towards products (e.g. enthusiastic, hostile). During the 1990s Swarbrooke and Horner (1999) note that a number of researchers have identified six primary ways of segmenting tourism and travel markets:

- Purpose of travel
- Buyer needs, motivations and benefits sought
- Buyer and user characteristics
- Demographic, economic, geographic characteristics
- Psychographic characteristics
- Price

Research on developing a typology for surfers is noted by Dolnicar and Fluker (2003). A study carried out in California in 1992 divided surfers into: 'the rowdy bunch' (those who like to party a lot); 'school boys', who came to study and took up surfing later; 'weekend warriors' who work during the week and surf when they can; and 'beach bums', drop-outs who have made surfing a way of life. Dolnicar and Fluker developed a typology from a self-selected sample of Australian surfers. They analysed responses from 430 surfers to a computer based questionnaire exploring demographic and psychographic characteristics. From this they developed five categories of surfer:

- Price-conscious safety seekers – the oldest group, highest income, need for family facilities;
- Luxury surfer – price not an important factor, seek good accommodation, excellent food and safety;
- Price-conscious adventurers – personal safety important, high quality food important
- Ambivalents – no clear differences, information may be more subtle or masked;
- Radical adventurers – the youngest group, lowest income; local culture, lack of crowds, and environmental quality are important.

They noted that only a few members of any of the five segments referred to themselves as 'advanced', while the largest number of 'beginners' was found among price-conscious adventurers.

1.5 Characteristics of experience

There are three strands of theoretical development that have influenced research work in this area over the last two or three decades:

1. Specialisation theory
2. Theory about 'modes of experience'
3. Theories about 'flow' and peak performance

Each of these theoretical areas will be explored for their influence on the development of typologies of recreation.

1.5.1 Specialisation theory

Bryan in the late 1970s (see Bryan, 1977), developed an idea that participants in outdoor recreation activities could be placed on a continuum from general interest and low involvement to specialised interests and high involvement. This later became known as Specialisation Theory whereby each level on the continuum could be associated with types of experience sought, desired setting for the activity, attitudes towards resource management and even to type of equipment preferred.

The theory developed from Bryan's observations of anglers who were totally committed to their leisure activity and where there were conflicts between trout fishermen over stream etiquette, and between 'catch-and-release' and 'fly-fishing only' regulations.

More recently (Bryan, 2000) noted the potential for conflict between a small highly specialised 'elite' that may form within a particular recreation activity and a larger number of persons on the lower end of the specialisation curve who may have less knowledge about management issues, with recreation managers in the middle having to satisfy both constituencies.

Stebbins (1992) suggested that long-term benefits from participating in leisure activities would *only* be attained by those involved in what he termed 'serious' leisure pursuits. Stebbins suggested that people engaged in casual leisure pursuits could have 'fun', but long-term benefits only came from 'serious' engagement which implies a significant commitment of time and resources to the activity or pursuit. The range of long-term benefits from engaging in serious leisure were identified as:

- Self-actualisation
- Self-enrichment
- Self-expression
- Renewal of self
- Feeling of accomplishment
- Enhancement of self-image.

Stebbins suggested that only through deep involvement could the intrinsic rewards of a leisure pursuit be obtained.

Scott and Shafer (2001) note that other researchers have used recreation specialisation as a means of measuring 'intensity of involvement'. Bryan, on the other hand indicated that the degree of specialisation could be used to create a typology for a wide range of activities. The typology of trout fishing he developed was based around four classes of participant:

- Occasional fishermen
- Generalists
- Technique specialists
- Technique setting specialists

In terms of numbers there tend to be far more participants at the low specialisation end of the continuum but the longer a person participated the more likely he/she was to move into more specialised stages.

Decker, et al. (1987) built on the idea of specialisation with reference to involvement in wildlife-based recreation. They developed a model based on an understanding of internal (psychological) factors and external (social) forces that combined to determine a particular individual's involvement in wildlife recreation. According to these researchers involvement in a particular recreational activity was influenced by personal beliefs, attitudes and values, and social customs and expectations of others. But they also recognised a temporal aspect to recreation and viewed the adoption and increasing interest or rejection of a particular activity, as a process over time. An individual's involvement in recreation may develop slowly or quickly over time but in addition their orientation towards the activity may also change over time. Building on empirical studies and the work of Bryan they concluded that the majority of reasons for engaging in wildlife recreational activities (such as hunting, bird watching, fishing) could be combined into three categories:

Affiliative – people who become involved in a recreational activity primarily to accompany another person, to enjoy their company, or to strengthen/reaffirm their personal relationship

Achievement – people who become involved in an activity primarily to meet some standard of performance. They might have specific goals, such as hunting for a trophy to exhibit, or spotting a particular species to photograph or add to a list.

Appreciative – people who seek primarily a sense of peace, belonging and familiarity, and the resulting reduction in stress they have come to associate with the activity. Just the recollection of experiences can be rewarding.

Decker et al. built upon earlier work by Fishbein and Azjen (1975) in developing a theory of predictive behaviour, to assert that involvement in wildlife recreational activity is a learned behaviour. They also included 'time', to indicate the maturation process that takes place among individuals who continue to engage in the activity. Their experience with hunters suggested that over time there was a shift from an affiliative or achievement goal orientation to primarily an appreciative goal orientation.

Duffus and Dearden (1990) applied the concept of specialisation in their study of non-consumptive wildlife recreation. In their view, those engaged in non-consumptive wildlife recreation went through a maturation process based on the acquisition of more detailed knowledge of wildlife. This leads to an increasing specialisation in the type of activity undertaken with increasing focus on a particular species and/or locality. This also has implications for site management. More facilities may bring in larger numbers of visitors but drive away those with high levels of specialist knowledge. According to their paper a wildlife site may go through a maturation process where specialists initially outnumber generalists but eventually the general public will outnumber the specialist.

Cole and Scott (1999) applied specialisation theory to birdwatching in the USA. They compared 'casual wildlife watchers' with 'serious birders'. The two groups were found to differ significantly in terms of their skill at identifying birds, frequency of participation, annual expenditure and behaviours while birdwatching. Serious bird watchers were found to plan trips on the basis of birds they expected to see and placed little importance on complementary activities (e.g. visiting historic sites), availability of camping facilities, level of on-site development, and interpretive and structured activities. More than 80% of the sample of serious bird watchers maintained life lists of all the bird species they had identified. This would identify the majority as in the 'achievement' stage according to Decker et al. (1987) rather than in the 'appreciative' stage of specialisation. The sample of casual wildlife watchers were more concerned about camping facilities, alternative activities and level of interpretation and made trip decisions based on the range of opportunities available in an area.

The study also noted the uneven numbers of different types of birdwatchers. It was suggested that 'expert' or 'serious' birdwatchers made up only 3% of all birders in the country. In another estimate 'casual' birders were estimated to outnumber 'advanced' birders by six to one.

In the UK specialisation theory has been utilised to segment the active recreation tourism market. Keeling (2006) developed a typology based on "people's interest in an outdoor activity" and " the amount of time they devote to it". Four categories of recreationalist were identified:

- Samplers: those trying an activity for the first time or only undertaking it occasionally
- Learners: those learning an activity or seeking to improve their skills
- Dabblers: people who occasionally take part; people who have a level of skill but do not regularly undertake the activity
- Enthusiasts: people who regularly take part; experts in activities requiring knowledge and skill.

Keeling also notes that individuals may fall into one or more categories at different times depending who they are with and the type of activity. He also goes further than previously cited studies in identifying the relative numbers of each category in a range of different activities. Thus, sailing and water sports are "dominated by enthusiasts and learners", dabblers are prominent in cycling, while "more dangerous adventure sports such as climbing attract mainly enthusiasts". Unfortunately the categories as defined do not appear to be mutually exclusive. It is difficult to differentiate for example between samplers and dabblers, or between learners and enthusiasts.

Scott and Shafer (2001) suggested that the degree of specialisation could be measured in terms of behaviour, skill and knowledge, and behavioural and personal commitment.

More recent work by Lee and Scott (2006) suggests that increasing specialisation brings not only long-term benefits to individuals but also imposes costs in terms of leadership demands. The demands on persons in leadership roles may result in diminished self-determination and consequent undermining of the benefits gained from specialisation. Examples include: birdwatchers who are asked to take on leadership of walks and programmes of events, kayakers who are asked to spend time instructing others, because of their level of knowledge and skill. Their work also suggests that only the skills/knowledge and personal commitment dimensions were significantly related to the acquisition of enduring benefits from engaging in a leisure pursuit (in this study of birdwatchers), and that behavioural commitment and taking on leadership roles diminished self-determination. But overall they suggest the results indicate that the benefits of specialisation outweigh the costs.

1.5.2 Experience preference scales

A significant amount of work has been carried out, particularly in the USA over the past thirty years, using 'experience preference scales' for analysing choices and benefits obtained from outdoor recreation. Driver (1983) in particular, working for the US Forest Service was instrumental in the development and application of preference scales to examine visitor recreation preferences. The recreation experience preference scale was based on the notion that recreation should be considered as a "psycho-physiological experience that is self-rewarding…" (Manfredo, Driver and Tarrant, 1996). Over time a wide range of items were developed for inclusion in recreation experience preference scales to measure various dimensions of a recreation experience. These included items under the following headings:

- Achievement/stimulation (which includes scales exploring self-image, excitement, and skills development)
- Autonomy/leadership
- Risk-taking
- Equipment

- Family togetherness
- Similar people
- Learning
- Enjoying nature
- Introspection
- Creativity
- Nostalgia
- Physical fitness
- Escape social security
- Teaching/leading others

Recreation experiences were viewed as a bundle of psychological outcomes that might have multiple dimensions. Manfredo et al. (1996) identify six types of research conducted using recreation experience preference scales:

- Describing and comparing experience preferences of participants in specific activities
- Attempts to empirically derive 'experience types' (i.e. persons who had similar experience preferences)
- Exploring the relationship between experiences, settings and activity preferences
- The relationship between non-leisure conditions and experience preferences
- The relationship between experience preferences and basic characteristics of participants
- Methodological research to develop and test scales.

The scales continue to be utilised to explore motivations for engaging in out door recreation activities (e.g. see Todd, et al., (2004) who applied preference scales to examine level of development among adventure recreationists), and have also been used to determine the extent to which leisure achieves other objectives in a person's life. Validity of the scales depends on a range of factors including time of application of the instrument containing the scale, internal reliability of the scales used, and theoretical rationale for utilising the scale (Manfredo, et al., 1996).

More recently Driver has expressed concern over misrepresentation and understanding on the use of such scales. According to Driver, the scales only measure satisfaction gained from the psychological experiences measured by the preference scales used and cannot be applied to new recreational participants – only those with prior experience of the activity under examination. Recreation experience preference scales continue to provide a range of information on the psychological rewards from participating in recreation and can help countryside managers understand the needs of different visitors. In particular they can be used to explore satisfaction with recreational experiences of different types of user.

1.5.3 Modes of experience

A more recent European approach has been taken by Cottrell, et al. (2005), who used a typology based on modes of leisure experience (developed previously by Elands and Lengeek, 2000; and Lengeek, 2001) to explore recreation in a Dutch forest. Five 'modes of experience' were described:

Amusement
Fun - familiar environment, your own language, ease;
temporality – a short break

Change
Escape - getting away from boredom or stress of drudgery of everyday life;
Difference with everday life more strongly felt
relaxation; recovery – recharging the batteries
Context - is less important

Interest
Search for interesting vistas and stories
Variation
Stimulation of imagination – not necessarily authentic, like to be informed

Rapture
Self-discovery – new awareness of own identity, experience of 'self';
Unexpected – open to the unknown or unexpected
May also be directly linked to feelings of space (immensity), time (eternity), sociality (paradise lost) and tension of consciousness (contemplation)
Crossing borders – discovery of physical boundaries

Dedication
Quest for authenticity or mastery.
Appropriation and devotion – new ideas about what nature really is arise; a hobby becomes fulfilment in life; the extraordinary becomes ordinary or is mastered in a niche in which a fixed place has been created for it.
Merge – being absorbed in a 'back-stage' world
Timelessness – wish for a permanent stay

The study required empirical data to assign visitors to each mode, although it is not clear to what extent the modes are context specific. The paper explored modes of experience for visitors to a forested area in the Netherlands. Putting this approach (MES) into practice requires complex statistical techniques (factor analysis, clustering techniques) and the paper therefore looked at potential for creating a simpler approach. The results suggest people belong to different modes depending on the specific nature of the activity engaged in, and the setting where leisure activity occurs. Results also suggested that visitors might be in multiple modes during one visit. 'Amusement', 'change', and 'interest' were the most consistent modes of experience found in this study. But the study also found that the main modes were 'change' (43% of visitors) and 'rapture-physical challenge' (30%). This matches the physical setting of the forest, which provides for people to escape to nature through an intricate trail network, and for more strenuous hiking and mountain biking (physical challenge). No association was found between MES and education, gender, or age suggesting that persons of all ages and both genders have similar experiences.

The study found that visitors mostly came for hiking and to get away from daily routine. A key facility, the pancake house, was important to a significant proportion

of people in all modes – not just those in amusement mode. Only 13% sample came specifically came for the pancake house but 37% of the sample visited it. Thus it is important as an experience attribute. This suggests managers need to be aware of possibilities to establish a variety of experiences in a particular setting and the consequences. A person in rapture mode can switch to amusement when he has satisfied the peak experience implied in the rapture mode. Previous research has shown rapture and dedication modes prefer wilderness nature with pure and simple facilities and extensive nature management, whereas 'amusement' and 'change' modes prefer cultivated nature with good facilities and intensive nature management.

Cottrell and Cottrell (2003) imply that 'managing outdoor recreation areas involves recognition of existing or anticipated leisure needs and desires and devising specific steps to fulfil them'. Also: 'public enjoyment of nature must be defined through understanding of the visitor experience – which may sometimes be at odds with viewpoint of park manager'. In their view, 'a preference based typology such as MES helps to make a distinction between visitor types based on their perceived preferences for an experience'.

1.5.4 Theories of 'flow'

An alternative explanation for the benefits of outdoor recreation has been proposed by Csikszentmihalyi (1975, 1990) - 'flow theory', which he developed to answer the question of "How do intrinsic rewards feel?" (Jones, Hollenhorst and Perna, 2003). 'Flow' refers to the feelings brought about by being intensely immersed in an activity, which balances challenges with the skills level of the participant. Flow is made up of six elements related to the merging of action and awareness, loss of self-consciousness, a sense of control over actions, and the environment, and transformation of the perception of time for the participant. Csikszentmihalyi argues that many adventure related activities provide the conditions in which to experience 'flow'. From this it could be argued that feelings of 'flow' are the 'peak experience' sought by participants in many outdoor recreational activities (such as, climbing, sailing, kayaking, fell running).

It is extremely difficult to predict when and where the flow experience will occur as it depends not only on the environmental setting and the balance of challenge and skills, but also on the emotional or mental state of the participant. Jones, et al. (2003) report on the difficulties researchers have experienced in trying to predict the 'flow' experience due to the need for real-life challenges which require the participant to take control of a situation.

The flow experience, which has been associated with notions of 'serious' leisure and peak states of performance in a range of sports, is highly dependent on the mental attitude of the individual, which will vary from day to day and even during the course of participating in an activity, and in the balance of challenge and skills at any particular time. It is not an element that can be managed by others, or enhanced through provision of certain facilities. It thus has limited appeal as a basis for categorising participants in outdoor recreation.

2. Gender and cultural influences

2.1 Gender and Leisure

There is a considerable amount of research on women and leisure, much of which relates to women from ethnic minority groups, or compares two or more ethnic groups. For example, Henderson et al (2001) discuss the 'leisure and physical activity of women of color' and Ainsworth et al (2003) report on research investigating the factors affecting physical activity rates amongst African-American women in the southeastern United States, concluding that 'multiple factors affect physical activity' (p.23). Taylor (2001) explores the leisure experiences of women from different cultural backgrounds in Australia and makes comparisons with a similar study in Canada. Both studies find that whilst leisure participation 'can facilitate the valuing [of] diversity', 'it can also be an alienating experience'.

Miller and Brown (2005) find that 'women are significantly less likely than men to participate in physically active leisure' and that 'women with children are less likely to participate in active leisure compared with women who do not have children'. In addition, Liechty et al (2006) found that body image and beliefs about appearance posed leisure constraints for female college students and their mothers in the US.

Wiley et al (2000) studied men's and women's involvement in hockey and figure skating in order to compare participants in gender appropriate and non-gender appropriate sports. They suggest that 'leisure involvement may be influenced by societal ideologies about the gender-appropriateness of activities, as well as by individual interests and preferences'. Weinberg et al (2000) looked specifically at young people's involvement in sport and physical activity.

Raisborough (2006) uses the example of the Sea Cadet Corps to explore women's access to experience of 'serious leisure', concluding that:

> *'While the SCC offers women a unique and distinctive social world, enduring gender relations and expectations, while uneven, shape how women use and give meaning to their participation in that world. This research suggests that to develop deeper understanding of women's serious leisure participation involves a focus on how women negotiate their access to enduring leisure and the ways in which women's relationships in and between different social worlds, impacts upon their serious leisure participation.' (p.259/60)*

2.2 Outdoor Education

Other literature considers the role of gender in access and responses to outdoor education. Cook (2001) traces the history of outdoor education for girls and concludes:

> *As outdoor education expanded in the 1960s, it seems that although girls were increasingly given equal access to outdoor education, they were absorbed into courses designed for boys.' (p.50)*

It seems likely that this is still the case today. Pohl et al (2000) looks at connections between wilderness recreation and women's everyday lives. She concludes:

> *'[P]ersonal growth is not simply an outcome of wilderness recreation, but may also cause one to recreate in wilderness. […] wilderness recreation can lead to self-sufficiency, connection with others, perspective change, and mental clarity. Some of these outcomes or a desire to further attain these outcomes can drive one back into wilderness. […] While wilderness recreation and personal growth function reciprocally, causing and affecting each other, it would be interesting to discover which comes first, the chicken or the egg. (p.431/2)*

Little (2002) studied the ways that women negotiate access to adventure experiences. She found that:

> *'Adventure recreation is a specific form of leisure that tends to be physically and intellectually challenging and predominantly accessed in natural environments. Traditionally, it has been perceived to be a male dominated arena requiring "masculine" qualities of strength and risk-taking, and as a result, constraints for women in outdoor adventure can be multiple.' (p.159)*

Boniface (2006) also considers constraints on women's participation in outdoor education but she concentrates on the meaning of adventurous activities to the women participants. She carried out in-depth interviews with eight women (all of whom were white, British and middleclass) who were committed to outdoor adventure.

> *'High-risk adventure experiences were described as being more 'meaningful' than events in everyday life, and were seen by women to positively influence their well-being, self-esteem, confidence and competence.' (p.21)*

The women reported high-levels of fear, but, as Boniface points out, there is evidence that women are not necessarily more fearful than men but are more ready to admit their fear. In addition:

> *'All the women placed importance on shared adventure experiences which were seen to lead to the formation of close bonds and often long-term friendships with other adventure participants.' (Ibid)*

In contrast to Boniface's study of women already committed to adventure education, Humberstone and Collins (1998) studied the experiences of urban women on an adventure education course in the Welsh mountains. Many women (although not all) valued the all-female nature of the situation. As one participant said:

> *'The task set and activities undertaken were all led by women … gave us all a boost to our confidence! We were able to share our feelings without feeling uncomfortable. 'Fear' was okay … we all suffered from it.' (p.141)*

This finding is backed by Woodward (2000) who studied women wind-surfers. She found that all-female sessions allowed advice to be given on issues such as the best way to carry a surf board (which many women found difficult), and that women were more likely to support less-proficient participants. She also found that women and men tended to have a different attitude to risk, with women generally being more cautious and more conscious of the need to follow safety procedures. Consequently, Woodward recommends an increased awareness of gender issues amongst recreation managers.

In accord with Pohl's findings discussed above, some of the women in Humberstone's and Collins' study found an increased confidence in their everyday lives as a result of the adventure experience.

> *'If I could reach the top of mountains, what else could I achieve?'*

2.3 Women, the environment and landscape

Humberstone and Collins (1998) found that for many of the women they studied there was ' some sort of awakening of environment awareness and feelings of connectness with the landscape which in some cases had profound effects upon their self perceptions and future actions' (p.145). Humberstone and Pederson (2000) suggest that can 'challenge a masculine identity built upon the popular image of 'mastering' the wilderness' (p.105)

It is also possible that environmental attitudes affect the likelihood of participation in outdoor recreation and the experiences sought from the experience. Virden and Walker (1999) studied the influence of ethnicity and gender on environmental perceptions. They found gender differences in the perception of forests as 'mysterious or unmysterious, awe-inspiring or uninspiring, and safe or threatening' (p.237) with women more likely to find forests mysterious, awe-inspiring and threatening. Gender differences were also found in the type of setting preferred for outdoor recreation, with women preferring 'manager presence and development for visitor convenience' (p.235).

2.4 Conclusions: Gender and Outdoor Recreation

Whilst, generalization is dangerous, there do seem to be some ways in which women's access to and experience of outdoor recreation differs from that of men.

Humberstone and Pederson (2000) support Miller and Brown's (2005) assertion that family responsibilities constrain women's leisure participation more than they do for men. This was found to be true for outdoor activity in the UK and Norway. Thus it seems that women's participation in outdoor recreation is constrained a number of factors including family responsibilities, societal expectations and self-image. However, many women do overcome these constraints, and participation in adventurous outdoor activity can lead to increased confidence in everyday life.

Women's motives for taking part in adventurous outdoor activities may be rather different from men's, as they are more likely to value the feeling of working together with others to a common aim and the friendships formed as a result. There also appears to be a gender difference in attitude to risk, with men more likely to take risks and women likely to be more safety conscious.

2.5 Cultural/ethnic differences

2.5.1 Models of Ethnicity and Recreation

Gomez (2002) reviewed conceptual models illustrating the relationship between ethnicity and participation in recreational activities and developed a new model, the Ethnicity and Public Recreation Participation (EPRP) Model incorporating elements of previous models. He subsequently tested the model on 311 Puerto Ricans in Massachusetts, using frequency of visits to parks as a measure of recreational participation. (Gomez, 2006).

There has been a considerable amount of research on the effect of ethnicity on leisure behaviour. In particular, the frequency and type of usage of US parks has been studied. Some of these articles (Henderson and Ainsworth, 2001; Ainsworth et al, 2003) pertain specifically to black women and have been mentioned in the review of gender and leisure.

Payne et al (2002) found that race had a stronger effect than age or residential location on type of activity preferred in urban parks. Sasidharan et al (2005) looked at urban park usage by Hispanic, Chinese, Japanese, Korean, African American and White groups. They found a number of differences in the ways that parks were used:

> *'The results of the study highlighted several similarities and differences in outdoor recreation characteristics among the six population subgroups. Findings also demonstrated the presence of certain acculturation-based variations in type of urban park usage and activity participation within the Hispanic, Chinese, Korean and Japanese groups, respectively.' (p.34)*

They found that:

- 'Ethnic respondents' were more likely to visit the park in larger groups.
- 'There was a higher incidence of group oriented activities … among the ethnic groups'.
- 'Outdoor and land and water activities were very popular amongst Hispanics'

They point out that there are also variations within ethnic groups. However, they found that level of acculturation did not have a profound impact on outdoor recreation characteristics, in most cases.

Tinsley et al (2002) also found differences in park usage amongst African-American, Hispanic-American, Asian-American and Caucasian-American park users:

> *'Significant differences were found among the ethnic groups in their use of park facilities, the social milieu within which they visit the park and their ratings of the psychology benefits of park use.' (p.199)*

Shinew et al (2004) found that African-Americans were less likely than Caucasians to feel restraints on park usage. One of the possible explanations they suggest is that 'African-Americans have become more accustomed to negotiating constraints, and thus have developed strategies of resistance to empower themselves in life and in leisure. Consequently, African-Americans may report being less constrained.' (p.194) They also found that 'African-Americans and Caucasians have distinct leisure activity preferences.' (p.195)

> *'African-Americans showed greater representation in three of the clusters (Sport/Fitness, Social Activities/Interaction, and Non-outdoors), while Caucasians were more represented in the other two clusters (Leisure Enthusiast and Outdoors).' (Ibid)*

They suggest a possible explanation:

> *The current study's findings could be interpreted as African-Americans "freely choosing" not to participate in stereotypical Caucasian leisure pursuits, suggesting an individual form of resistance and "self-determination." (p.195)*

If this is so, it may also lead to reluctance amongst some ethnic groups to take part in outdoor education in other contexts, where participation is seen as a denial of the norms accepted within their own ethnic group.

He and Baker (2005) examined differences in physical activity (both work-related and leisure-related) between Black, Hispanic and White ethnic groups. They found that differences could be explained by differences in educational attainment and health. Richter et al (2002) studied African-American women and found that 'cultural influences were more important in determining the type of physical activity than its level' (p.91).

2.5.2 Ethnicity, Culture and Outdoor Recreation

Cultural and religious differences may be more significant than ethnic differences per se. Stodolska and Livengood (2006) looked at the influence of religion on leisure behaviour amongst Muslims in the US. They found a 'strong emphasis on family oriented leisure' (p.293) as well as requirements for 'modesty in dress, speech and everyday behaviour' and 'restrictions on mix-gender interactions, daring, food and alcohol' (Ibid).

If cultural differences are more significant than ethnic differences it might be expected that recent immigrants would feel more restricted in leisure access. Taylor and Doherty (2005) found language difficulties to also be a barrier to leisure participation by recent arrivals to Canada. They concluded:

> *'Language, unfamiliarity and feeling excluded were the main challenges to participation, but notably these were bigger barriers for females than for males.' (P.235/6)*

There has been some research specifically on ethnicity and *outdoor* or *active* recreation. Tsai (2005) carried out a cross-cultural study of university students in Hong Kong and Australia, looking at the 'influence of perceived positive outcomes on participation'. Although she found many similarities between the two groups, 'affective outcomes ' were found to be more important to Australian students, whereas 'psychological outcomes', were more important to students in Hong Kong. She concludes:

> *'The findings suggested that cultural values and social, physical, and leisure environments could moderate the cognitive processes that underlie engagement in regular active recreation.' (p.385)*

Yoshioka et al studied 'the desired psychological benefits of leisure participation' of students from the US, Canada, Japan and Taiwan. They found some differences between the North American and the Asian students in the fields of 'fun/thrills' and 'achievement' but no differences in 'nature appreciation', solitude/escape' or 'family'.

Walker et al (2001) compared the motivations of Chinese and Euro-North Americans in the same outdoor setting. They explain differences in terms of 'independent' and 'interdependent' self-construals. They found that ethnicity did affect motivations for recreation, 'although this relationship is usually, but not always, mediated by self-construal' (p.263).

2.5.3 Ethnicity and Attitudes to the Environment

Attitudes to the environment may affect the likelihood of taking part in outdoor leisure as well as motivations for doing so. Deng et al (2006) compared environmental values of attitudes between Chinese in Canada and Anglo-Canadians. They found differences in 'social-altruistic' values between the two groups but no difference in 'biospheric' values.

However, Virden and Walker (1999) found ethnic differences in the rating of forest environments as safe or threatening and pleasing or annoying, with Whites finding the environments more pleasing than did Blacks and safer than either Blacks or Hispanics. They speculate that this may be due to Whites being more likely to have had outdoor experience during their youth. They also found that Blacks preferred less remote and more developed settings than either Whites or Hispanics.

2.5.4 Ethnicity and the British Countryside

The Black Environment Network (BEN) encourages members of ethnic minority groups in Britain to visit the countryside. Its report 'Access to the Countryside Trips' lists the advantages of countryside trips to ethnic communities in terms of 'environmental awareness and understanding', 'cultural and social benefits' and 'impetus for environmental action'. However, it continues by listing the problems encountered in arranging visits. They include lack of public transport, the need for equipment such as walking boots, information being only available in English, lack of confidence and feelings of apprehension, racist remarks and the feeling that they are the object of curiosity.

This last problem may be due to the way that the British countryside is regarded and portrayed as quintessentially white British. Aitchison (2003) quotes Rose (1995):

> *'The Black Environment Network has pointed out that the numbers of black people who are members of organizations such as the National Trust, Ramblers Association or Youth Hostel Association are very small. They suggest that one reason for this may be that the vision of Englishness which rural images of England convey is a white Englishness. The English sense of place discourages black membership of rural organizations because the countryside is not seen as an appropriate location for black people.' (p.28)*

Although the above passage refers only to England, it may be that a similar sense of place exists in Wales.

2.5.5 Conclusions

Most of the research on ethnicity and leisure is North American, and hence it is difficult to judge its relevance to the Welsh situation. Also much of it concerns use of parks rather than focusing on outdoor recreation. However, ethnic and, more specifically, cultural differences have been identified. In particular, the findings of Payne et al (2002) regarding the preference of some ethnic groups to take part in leisure activities in large groups; and Stodolska and Livengood's (2006) findings regarding the religious and cultural factors affecting Muslim recreation may be relevant.

In the case of Britain, attention needs to be given to the practical factors, which restrict ethnic minority access to the countryside and to the ways in which the countryside is portrayed and understood.

3. Electronic Discussion Forum

3.1 Introduction

A range of electronic discussion forums were accessed during October 2006 to explore some of the issues of interest connected to outdoor recreation. A total of 14 forums were contacted:

- Shecycles.com
- Outdoorsmagic.com
- Ukclimbing.com
- Ukcaving.com
- Singletrackworld.com
- Bikemagic.com
- Fishingmagic.com
- Landyzone.co.uk
- Ramblers.org.uk
- Equineworld.co.uk
- Fellrunner.org.uk
- Forces-of-nature.co.uk
- Paraglidingforum.com
- Surfmagic.com

The response was highly variable with some forums answering all questions and generating significant discussions, while on others there was no useful response at all.

Two sets of questions were introduced to the discussion forums in a phased process. The first set of questions explored attitudes to risk and level of skill, the second phase explored experiences of recreation and factors that contributed towards a good experience. Not all forums were provided with the first set of questions as these related only to activities that are considered to have an element of risk attached.

<u>First Phase</u>
Young men are more likely to be attracted to activities such as …… because of their desire for adrenaline and risk. Could other activities such as … offer similar experiences?

Women have different attitudes towards danger/risk and challenge and as such prefer less challenging activities?

You enjoy …… more if you are good at it.

Second Phase

For you personally, what specific elements of a ..... trip makes it an enjoyable experience?

In your opinion, are there any factors that restrict …… from having a good …… trip/experience?

In your opinion, what factors do you think are influencing the development and growth of …… in Britain.

If you undertake other outdoor activities, what are they, and how does the overall "experience" compare with ……?

The results from the discussions are summarised below under broad headings related to the questions posed.

3.2 Attraction of males to outdoor recreational activities due to levels of perceived risk

This topic stimulated a significant level of reaction from both male and female respondents on a range of forums. Some of it was ill-considered 'knee jerk' reaction to the suggestion that men and women might seek different things from outdoor activities, some was insightful and carefully thought through opinion.

Females on one cycling forum felt they were different from the 'ordinary girl-in-the-street', in that they enjoyed going out in the cold and rain to get covered with mud. Several respondents noted that there were relatively few girls involved in either climbing (as leaders) or mountain biking. One respondent suggested that the media representation of mountain biking as being dangerous might contribute part of the attraction for young men. Peer pressure was also noted (by females) as being a factor pushing young men to take risks. Female respondents tended not to think of mountain biking in terms of risk, which was viewed as part of an individual's perception of an activity, but more in terms of physical challenge and being in the outdoors. The level of commitment in mountain biking was seen as much less in mountain biking (you can always get off your bike and walk!) and thus it was not regarded as having high risks.

Cultural influences were viewed as potentially strong with differences between young people in New Zealand, where the majority are exposed to outdoor activities, and London (where the majority are not exposed to such activities) being marked. One respondent noted that in Finland skiing was considered a normal routine activity, carried out as much by women as men, and not considered 'extreme' in the least. It was felt if more females were given the opportunity to try sports such as mountain biking they would enjoy them.

A caving forum discussion took the view that caving was not a risky activity, but that there were far more injuries from other activities such as mountain biking. Risks were to be avoided in caving: "The skill in caving is minimising risk."

Paragliding was not perceived as a 'risk' activity. The focus is on control of risk.

3.3 Attitudes of males and females towards risk

A significant number of female respondents agreed with the suggestion that males and females have different attitudes towards risk. Females were seen as having a more cautious attitude, as less likely to push themselves beyond their boundaries, and as less likely to want to scare themselves. One respondent stated: *"I would rather learn a bit more slowly and concentrate on riding things with good style and skill that I am comfortable with, rather than scaring myself stupid".* This attitude was not seen as a bad thing, several female respondents cited men they know who had ended up in hospital due to taking risks. A few respondents were of the opinion it was largely cultural influences and gender stereotyping that produced the difference between boys and girls. The suggestion was that with "the right support and encouragement" more girls would try adventurous outdoor activities.

The issue of 'risk' was fairly complex, and tied up with attitudes, personalities and perceptions, and confounding of the concept of 'risk' with that of 'challenge'. There was a tendency for females on forums to make assumptions about the reasons why men appeared to take more risks (response to media, to peer pressure, showing off, cultural expectations). Females tended to assume they knew why males take risks, male respondents, for the most part, did not engage in a corresponding discussion. Males that did respond tended to state the differences as being based on cultural influences and socialising of females to behave in a certain way, others dismissed the statement out of hand.

Females appeared to have a different understanding of the concept of 'risk'. For female respondents 'risk' appeared to be connected to level of proficiency, for example:
"I like to know what I am doing…"
"Women take risks but they do so while being aware of their own skill level and experience."
The perception that as ability improved more risks were taken was at odds with the suggestions that women lack confidence, and desire to build on skills before doing something new and harder. One respondent based attitudes to risk on previous experience, and whether a person had actually suffered physical harm from an activity. Female respondents did not seem to have a clear understanding of male attitudes towards risk ("when blokes take risks their limits may depend on the capability of their peers").

The paragliding forum suggested that females were more risk averse than males, but that they often made safer pilots, and that they were not opposed to undertaking challenging activities.

3.4 Enjoyment of an activity related to level of achievement

The suggestion: to get maximum enjoyment from an activity one has to be good at it, was rejected by almost all respondents. The general view was that enjoyment could be achieved at all skill levels. But there were suggestions that physical fitness played a role in enjoyment of outdoor recreation, with increased fitness being associated with greater levels of enjoyment.

Several respondents noted that enjoyment could be obtained at any level of engagement in an activity, but the key factor was matching the physical and technical challenge with the ability of the person in order to maximise enjoyment.

A respondent on the caving forum suggested that novices often got a huge amount of enjoyment from their first caving trips, because they had to push themselves and this gives them a boost in self-confidence. Paragliders also suggested that the very first flight could give as much enjoyment as subsequent ones.

Kite surfing (and windsurfing) respondents indicated that enjoyment levels increased as technical proficiency improved. A minimum level of ability (staying up) is required in order to maximise enjoyment from the sport. There is also suggestion from paragliding forum that enjoyment increases with technical proficiency, as improvements enable long distance flights and aerobatics.

3.5 Elements of an outdoor recreation experience that make it enjoyable

Females (from a cycling forum) indicated that the 'personal sense of achievement' from overcoming physical challenges was important. Some suggested that they were competitive and liked keeping up with or surpassing others in ability. Some indicated they did not like the competitive element. Health and fitness were mentioned several times as benefits from cycling (for example, "enjoying the fresh air and exercise").

The social side of activities came across quite strongly as being important in making outdoor recreation enjoyable. Females cited: being part of a group, being able to do things in the company of others, and being able to relax with friends in pub/café afterwards as important. In some cases the pleasures of eating and drinking after cycling/mountain biking were labelled as a 'reward' for hard work. For others it was the whole package of benefits that was important: the thrills, social chat, fun, effort, and sense of achievement from physical challenges. To a lesser extent being able to see more wildlife and getting closer to nature were mentioned less often as elements that made an outdoor recreation experience enjoyable.

A few males from the cycling forums cited 'ability to interact with nature' as important. Male cyclists also talked about physical challenges and the technical challenge of "getting the bike over terrain" that other people would not be able to do. Males also suggested that being able to get away from other people and from 'normal' life was important.

Male respondents from other forums, in particular climbing, cited a wide range factors influencing enjoyment:

- mental and physical challenge
- getting away from the day-to-day restrictions of modern life
- getting away from crowds and going somewhere remote mentioned several times
- challenge of dealing with the elements, and developing self-reliance, overcoming fear
- sense of adventure

Some male respondents also cited good company as important, and the social side was also valued in terms of being with friends, and welcoming hospitality from pubs/cafes/shops/etc. Males from a Caving forum mentioned 'scientific and aesthetic appreciation' as a factor in enjoyment, as well as the social aspects, doing things in a group, and the technical challenge of finding a way through unfamiliar territory. The discussion on the caving forum also highlighted the social side of the activity. Caving was viewed as an 'unstructured team activity' and the friendship and camaraderie engendered was an important part of the experience.

Respondents from a fishing forum appear to seek a somewhat different set of conditions when asked about the elements that contribute to enjoyment of their activity. Most respondents appear to seek solitude, and value being able to get away from other people. Getting close to nature, and observing wildlife appeared to be just as important as being able to catch fish. Fishing was often viewed as a way to 'get away from stress and strain of everyday life'. Several people noted that they had stressful jobs and this was a way to unwind. One person did indicate the range of emotions that might result from a single day's fishing, summed up as: "quietude, excitement, exhilaration, dejection and joy". Other factors cited include:

- a healthy population of wild or 'lightly managed' fish
- a diverse but mainly 'natural' environment both above and below water
- a sense of security – safe parking
- being in natural countryside/being 'at one with nature'
- peacefulness and 'natural' surroundings
- an opportunity to 're-connect' with nature.

The opportunity to observe and learn about wildlife came across quite strongly from several respondents. As one respondent stated: "I enjoy learning about the rivers I fish, how the fish respond to different weather patterns and changing seasons". The 'sheer pleasure of fishing' mentioned often, but catching something was seldom mentioned at all. Social aspects were not mentioned at all.

Riders on a horse riding forum found it more difficult to state the factors that made an experience enjoyable. Freedom, fresh air, seeing the countryside from a different perspective, and the excitement from galloping across a field were all mentioned. Working with the horse in a partnership was stated as one element of the enjoyment, and being outdoors and keeping fit.

3.6 Factors that restrict good experiences

Poor public transport was mentioned on several different forums as a barrier. Poor public transport, for example, makes it difficult to undertake linear walks, and creates access problems for those without a car.

Concern over poor parking facilities, and safety of vehicles from crime was an issue – again noted on fishing forums as well as cycling and climbing forums.

Access to footpaths, bridleways, and land was indicated on several forums as a factor restricting good experiences. This was expressed variously as: 'difficult access', 'unnecessary access restrictions by public bodies', 'poor access'. One mountain biker forum was also concerned over "conservation bodies with pre-conceived views that mountain bikers cause erosion". One mountain bike forum

suggested the 'inability to use footpaths' and horse "damage" making paths un-ridable as problems. For horse riders the problem was also lack of access to bridleways and having to go on busy roads to get to them. The weather was mentioned by several respondents as restricting good experiences, and the relationship with the horse being ridden was important.

The weather was cited by some as a factor that could lessen the enjoyment of outdoor recreation, but others, on cycling and outdoor forums, suggested it could enhance the experience, and that poor weather could also provide benefits from the physical challenge and sense of achievement in 'battling' with the elements.

Poor/unfriendly service provision was also indicated as lessening enjoyment.

The fishing forum indicated a slightly different set of concerns. These can be summarised as:

- other people
- dog owners with uncontrolled dogs
- threat of attack (e.g. from Animal Liberation Front, drug addicts, thieves)
- litter
- other users, e.g. boaters
- East Europeans who pretend not to know the law
- lack of licence checks and enforcement.

But there were also some similar problems cited, in particular, poor service. The main concern was not with hospitality provision but with lack of information and advice offered by tackle shops, especially to people new to the sport.

3.7 Factors affecting growth of outdoor recreation activities in Britain

Mountain biking and cycling more generally were viewed as growth sports. Improvements in equipment were cited as an important factor. This applies particularly to mountain biking and down hill skiing. Both were perceived as more enjoyable and safer due to improvements in equipment (e.g. saddles, brakes and suspension for bikes; skis and boots for skiing; clothing for both).

Among walkers, climbers and cavers, there was some perception that people are now less likely to join clubs. The role of clubs appeared to be diminished while climbing walls and internet were viewed as more important as places to meet other climbers. In climbing, the increase in climbing walls was viewed as a cause of increased numbers of people climbing, but there was concern that many young people taking up the sport had less connection with the history and culture of climbing. In some cases this was seen as having led to conflicts over ethical approaches and bolting of climbs.

The role of the media was cited as influential, in particular in promoting some sports as 'sexy', but also by ignoring many outdoor recreational activities entirely.

One of the mountain biking forums suggested that trail centres would strongly influence people's expectations of the sport. The Forestry Commission was cited by one respondent as influential in leading to growth in mountain biking. It was also

noted that mountain biking had become more accessible with the growth of biking centres where map-reading skills are not needed.

A caving forum noted that few young men seemed to be attracted to caving recently, there was concern expressed that they were all 'surfing' and that there were more women than men taking up caving as an activity. There was some suggestion that young men are influenced by 'clothing manufacturers', who use advertising to make certain activities appear 'cool' and 'sexy'.

The fishing forums all mentioned the role of commercial fisheries. The growth of commercial fisheries and heavy advertising was seen as producing a 'perceived' growth in carp fishing. Commercial fisheries were mentioned by nearly all respondents as being influential in changing the expectations of those who start fishing (giving the impression that large fish can be caught with little skill/experience). There was also a strong concern over lack of youngsters entering the sport. Some suggested that teaching fishing would teach respect for the countryside.

3.8 Comparison of experiences from a range of outdoor activities

Not all respondents indicated that they engaged in other activities. Some indicated they did not, due to lack of time, but had engaged in other outdoor activities in the past. There was some cross-over from climbers taking part in caving, scrambling, walking and mountain biking. Also a suggestion that on wet days climbers might go mountain biking rather than rock-climbing. These were mostly activities that form some kind of a 'challenge'. There was a suggestion that for some respondents climbing was a 'natural extension to hill walking'.

In general more respondents on cycling forums seemed to engage in other outdoor activities: skiing, surfing in particular were mentioned, but also kayaking, walking and climbing. One mountain biker referred to walking as 'slow and dull' and as 'presenting few challenges and not completely occupying my mind'. Although quite a few climbers had mountain biked, and vice-versa, they were not viewed as giving the same type of experience. Climbing was viewed by several mountain bikers as more dangerous, the level of commitment was viewed as higher (with mountain biking, "…you can just get off and walk" if there is a problem), and the consequences of an accident more severe. Several mountain bike respondents indicated that they knew of people that had moved from climbing to mountain biking, but not the other way around.

Cavers who responded tended not to engage in other outdoor activities.

Few fishermen seemed to engage in other activities. One respondent on a fishing forum cited sailing and canoeing as 'boring', and scuba diving as too expensive. Another cited scuba diving and shooting as just as enjoyable as fishing. Walking was cited by one fisherman as an alternative activity, but his preference was to stay in one area and "take in the surroundings, and the wildlife". Another stated, that to "really bond with nature you have to remain quiet and sit still for some time". Camping, shooting, boating were indicated as alternatives by one respondent, but these were viewed as activities undertaken 'socially', while fishing was something to do in isolation where one can get away from other people. There was general acceptance on the fishing forums that "nothing compares to a good day's fishing".

On one forum (Forces-of-nature) there was some suggestion that the attraction between kite surfing and other activities such as motorcycle racing was similar and based on the level of excitement generated.

Paragliders indicated that the average age of a paraglider in the UK is in the mid-thirties. They also suggested that many activists also engaged in base jumping, caving and gliding.

3.9 Similarities/links between activities

There is very limited evidence of linkages between activities. The recreational literature does not explore this aspect of outdoor recreation. There is limited anecdotal and electronic discussion forum information that suggests there are some linkages and some key differences between activities. A significant division appears to exist between the field sports (e.g. hunting, shooting, fishing), and the natural environmental challenge type activities (e.g. kayaking, climbing). The natural setting and enjoyment of the activity itself (as opposed to the kill), are often cited as important by participants in field sports. This is an area that requires more in-depth research of participants themselves.

Links between activities
There is some indication form the electronic discussion forums that rock climbers will engage in mountain biking, possibly when the weather is bad, or during winter, or when climbing loses some of its attractions. There was indication of rock climbers taking up mountain biking but little evidence of movement the other way.

Surfing/kitesurf/sail board
The linkages here are based on similar set of techniques required to be proficient. Kite surfing has developed with appropriate technology and offers alternative challenges for surfers, particularly in areas where the waves are small or not dependable.

Canoe/kayak
A similar set of skills in terms of reading the river and managing craft on moving water, but participants tend to engage in one activity or the other. At higher levels the skills are significantly different and require dedication to master. There is some movement of participants between the two forms of activity at lower skill levels. There is a tendency for kayakers to prefer white water, and for canoeists to prefer more placid water in natural settings.

Hill walking-scrambling-climbing
There is some indication that people progress from hill walking to rock climbing and other types of mountaineering. The traditional pathway was for hill walkers to take up rock climbing and then move into ice climbing and more serious mountaineering (e.g. Alpine). To a certain extent this still seems to occur, basic rock climbing and rope work skills are essential for alpine climbing and ice climbing. The tendency is for rock climbers to try ice climbing and then move to winter or alpine mountaineering. Climbers will engage in hill walking/scrambling during winter or bad weather.

Differences between activities

Angling

The evidence from the electronic forum suggests that anglers seek solitude more than socialising with others when participating in the activity. For some the context and setting is more important than catching fish.

There is little information about experiences sought by participants in shooting but some of this might also apply. There is no evidence about movement of participants between the activities or the extent to which participants engage in more than one activity.

Horseriding

The evidence from the electronic forum suggests the relationship with the horse is an important part of the experience. The limited evidence also suggests that weather might be an important factor.

Mountain biking

Social factors appear important to be important for many participants as well as the physical challenge. The experience of riding with a group of friends is just as important as other aspects of the activity.

4. Developing a typology for participants in outdoor recreation

4.1 Categorising outdoor recreation

This section puts forward some suggestions for categorising participants in outdoor recreation activities. The ideas are based on dividing outdoor activities on the basis of the skill and knowledge required to undertake them, and on the theories discussed in the previous section on specialisation and modes of experience. We develop some 'rules of thumb' for categorising participants in outdoor recreation and put these forward as a basis for discussion.

A wide range of recreational activities has been identified. The table below divides them according to environmental media in which they take place. There are a small number of activities listed at the right-hand side of the table, which do not seem to fit with the general list. Zorbing involves rolling down a prepared track inside a large sphere, while vortexing (a term used in the USA) is connected to visiting sacred spaces. Trig-pointing refers to accessing Ordnance Survey trig points and geo-caching is a form of glorified treasure hunting using GPS, where clues are used to find a container which might contain a list of names of previous finders and perhaps some cheap objects.

LIST OF IDENTIFIED OUTDOOR RECREATIONAL ACTIVITIES

WATER BASED

- Canoeing (open canoe)
- Kayaking
- Sailing
- Cruising/narrow boats
- Water skiing
- Sailboarding
- Wakeboarding
- Boogie boarding
- Windsurfing
- White water rafting
- Surfing
- Kite-surfing
- Water skiing
- Canyoning
- Coasteering
- Tombstoning
- River bugs (individual inflatables)
- Swimming
- Fishing

LAND BASED

- Hill walking/rambling
- Fell running
- Orienteering
- Mountaineering
  - Rock climbing
  - Scrambling
  - Bouldering
  - Ice climbing
- Motocross
- Green laning
- Motor rallying
- Snowboarding
- skiing
- caving
- mountain biking
  - XC
  - Downhill
- Mountain boarding
- Horse riding
  - Hacking
  - Point-to-point
- Trotting
- Shooting (game)
- Wildlife watching

AERIAL

- BASE jumping
- Bungee jumping
- Sky surfing
- Hang gliding
- Paragliding
- Kite flying

OTHER

- Zorbing
- Trig-pointing
- Geocaching
- Vortexing

The list of activities needs to be analysed to explore similarities and difference between activities themselves, and in the experiences sought by participants. Some of the activities listed above are off-shoots of other activities, developed to provide

greater challenges to participants or due to new technology. Bouldering, for example, grew out of rock climbing as a way of keeping fit on wet days, but now has participants who focus on this as their main activity. Coasteering is really an extension of rock climbing, and 'canyoning' has been practiced for a long time by mountaineers in the form of gully climbing. Mountain boarding on the other hand, is recent and based on the development of composite fibre-boards and lightweight alloy axles and wheels. Mountain biking is also a recent, technologically driven activity based on improved frame strength, gearing, brakes and suspension of bicycles. It therefore seems likely that some of the same experiences will be gained from engaging in activities that have developed from the same underlying sport.

First, we suggest there are two broad types of outdoor recreation activity, 'explicit' and 'non-explicit'. To undertake an explicit activity requires some level of skill, knowledge, training or equipment. Examples are rock climbing, kayaking, windsurfing, and fell walking. Persons who do not have the skills or knowledge only engage in these activities in the company of those with the required skills, or through paying a qualified instructor or guide. Non-explicit activities are those that may be undertaken by almost any person, without the need for any additional knowledge, skills or training. Examples include: a leisurely walk or stroll in the countryside, riding a bike, going to the beach, picnicking, picking berries, visiting a managed historic site or wildlife centre, and admiring the landscape.

We prefer the terms 'explicit' and 'non-explicit' to the terms 'active' and 'non-active' outdoor recreation as they appear to offer a means of differentiating activities which almost any person may undertake from those which require an investment of time, money or other resources. The more commonly used terms for a broad distinction of outdoor recreation are active and non-active. But this makes it difficult to determine when an individual is engaging in an activity requiring some level of investment to acquire the necessary skills or knowledge. It also suggests that a beach holiday may not be 'active' when in fact the participants may be walking and playing on the beach or swimming in the sea, rather than just passively observing the scenery.

EXPLICIT ACTIVITIES	NON-EXPLICIT ACTIVITIES
Fell walking/hiking	admiring landscape
Mountaineering	going to the beach
Rock climbing	short walk/stroll
Caving	berry picking
Horseriding	visiting managed site
Shooting/hunting	picnicking
Bird/wildlife watching	
Sailing	
Cycling/Mountain biking	
Windsurfing	
Surfing	
Kite surfing	
Kayaking	
Canoeing	
Swimming	

Secondly, having differentiated between explicit and non-explicit activities we apply theories concerning 'modes of experience' and 'specialisation' to those partaking in outdoor recreation. The theory on modes of experience developed by Cottrell and others (and described in the previous section) is based on the idea that people have

different experiences each time they visit a place or take part in a recreation activity, which may be caused by a range of 'psychographic' variables such as values and beliefs, attitudes, emotional state of the individual, intentions, and the type and level of companions. These modes of experience can be described and measured for a wide range of activities, from visiting a restaurant to undertaking a challenging hike in the mountains. We apply a modified version of the theory to classification of outdoor recreation activities in this report.

The theory of specialisation developed initially by Bryan suggests that within each 'specialist' activity there is a stratification or 'hierarchy' of participants based on the level of skill and knowledge attained. The individuals within each stratum seek different outcomes from the activity but there is a progression from the beginner through to the expert that can be recognised and described. We also add to this the notion that those intensively engaged in an outdoor activity (or in 'serious' leisure as Stebbins would describe it) seek long term intrinsic benefits.

The classification presented here is based on these theories and applying them to the range of outdoor activities commonly found in Wales. Our aim is to go beyond the simple explanations often given for undertaking a range of outdoor activities based on 'thrill seeking', 'excitement', 'getting in touch with nature', or 'satisfying the primitive hunting instinct'. Evidence from both the literature and from our online discussion forums, suggests not only that similar experiences are sought from different activities, but for many participants the aim is not to seeking out danger and thrills, or in satisfying primitive instincts, it is more about acquiring a set of skills to enable challenges to be faced and overcome, about controlling risks, and connected to the benefits of socialising with a like-minded group of people.

4.2 'Rules of thumb' for categorising participants in outdoor recreation activities

Our approach is based on some simple heuristics or 'rules of thumb' developed from the outdoor recreation literature.

1. People seek different experiences from engaging in a particular outdoor activity.

2. People may desire different experiences from the same visit (whether one day or multi-day).

3. Any person engaged in an outdoor activity (explicit or non-explicit) can be assigned to one of four categories based on the characteristics of the experience sought. The categories are:
    i. *fun and socialising:* visiting familiar places, for enjoyment, often with friends and family, relaxation;
    ii. *change of scene/something new:* looking for something different from everyday life; try new things;
    iii. *focused interest and mastery:* improving a skill; learning about an area, place or subject, absorbing information, achieving mastery of a skill or area of knowledge (which may be highly localised);
    iv. *challenge and self-discovery:* physical challenge, raise awareness of own capabilities, testing one-self, open to the unknown;

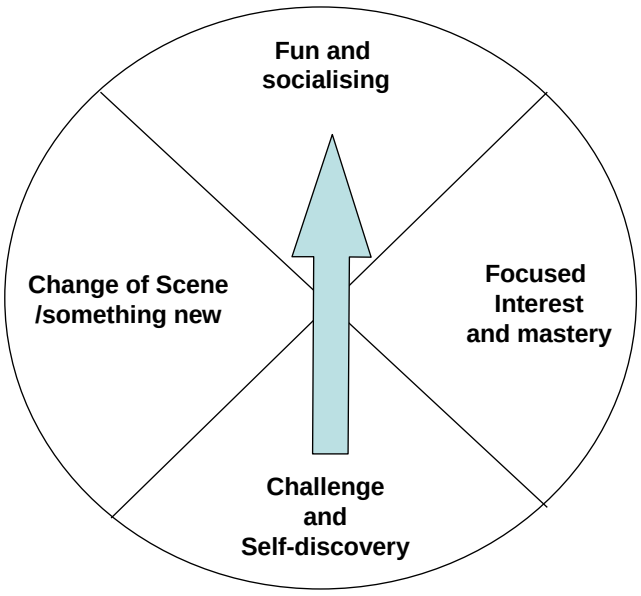
4. Individuals may switch from one category or 'mode' of experience to another on subsequent visits or even during the course of a single visit to a recreation area.

5. The social aspects are important as many outdoor activities require people to work together in order to participate and/or to accomplish goals (e.g. caving, climbing). Even in activities where individual performance is more important (e.g. surfing, fell-running, fishing), the social aspects of meeting and getting to know other participants is often an important part of undertaking the activity.

6. People engaged in different activities seek the same set of underlying experiences.

7. Individuals can be thought of as having an internal 'experiential' compass. The 'compass needle' indicates the particular mode of experience of an individual during an activity. The needle may move to another mode after the activity is completed, or may change depending on the intentions of the individual for a specific visit. For example, a person may undertake a strenuous hike during the day the intention of which is physical challenge, but when the hike is completed he may want to go to a pub or café to engage in conversation with others, or for a meal, and the compass needle may swing to the fun and amusement mode. Or, on a subsequent visit he may bring his children and

THE EXPERIENTIAL COMPASS



engage in a less arduous hike, his intention is to spend time with his children and have them enjoy the countryside, his compass needle might point to a change of scene, or fun and socialising.

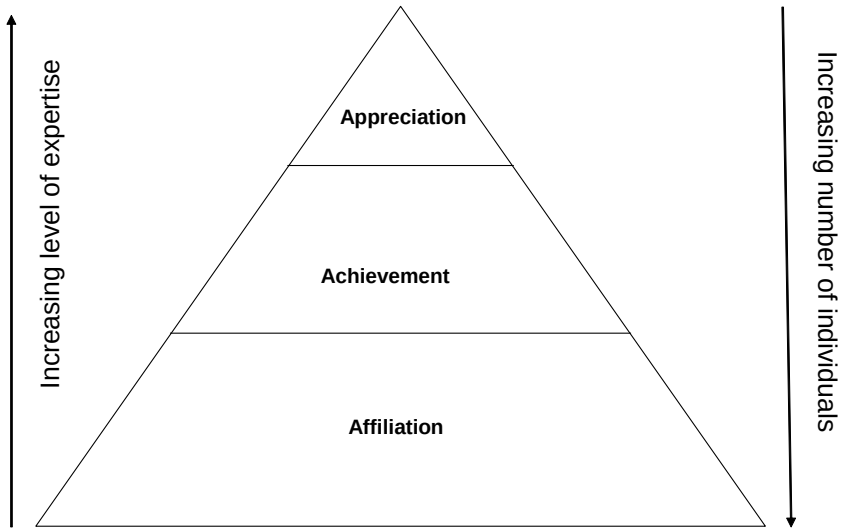
8. It can be difficult to differentiate the mode of experience of a participant when the person, or persons he/she accompanies are also an important part of the experience. But research has shown that in many instances participants in an activity are able to specify the key mode of experience for a particular event.

9. All 'explicit' outdoor activities reveal a similar structure in terms of the relationship between numbers engaging in the activity and the level of skill and expertise attained. Individuals progress through a process of specialisation as they increase their level of knowledge, skill or expertise.

10. Specialisation in an activity can be viewed as a pyramid. The largest number of participants in any activity are the least skilled, they may be beginners learning about the activity, people 'having a go' at something new, or persons who accompany more skilled individuals. The most highly skilled individuals in an activity make up the smallest number of participants, although they may be very influential in the way an activity develops or changes.

11. As individuals become more skilled they seek different experiences. Those at the bottom of the pyramid (referred to here as the 'affiliation' stage) may be more interested in the social aspects of engaging in an activity, or the companionship provided. As an individual becomes more skilled he/she will focus more on personal achievement (which may be interpreted in different ways for each activity). In kayaking, for example, the focus might be on attaining the next level in the BCU star system, or doing some grade 5 whitewater. At the top of the pyramid are the mostly highly skilled persons, having mastered the techniques, may seek greater challenges. These may come from undertaking activities under more extreme conditions (e.g. winter), or with less equipment (e.g. solo rock climbing, fishing with a more simple set of equipment). They are likely to be less interested in specific achievements (such as completing lists) and more focused on intrinsic rewards of undertaking the activity in 'good style', or in more remote settings. This layer is termed 'appreciation'. Participants at this level would be focused on the intrinsic rewards to be gained from Stebbins' description of what he termed 'serious leisure'.

THE SPECIALISATION PYRAMID



12. Higher incomes and leisure time are leading to an increasing number of highly skilled outdoor activity participants. There is thus likely to be a growth in the number of niche activities as these individuals seek new challenges.

13. Technological improvements are making it easier for persons with low levels of skill to participate in outdoor activities at higher levels. For example, the use of plastics in canoe construction mean that canoes and kayaks are far more durable and can withstand more punishment than previously.

14. The popular media for each activity tend to focus on the 'achievers' in the central layer of the pyramid. This layer tends to be made up of active participants, keen to improve their skills, or to gain greater status in the relevant 'sport community' through winning competitions, and thus more likely to spend money on new equipment. Large portions of this media are concerned with how to improve skills and evaluations of new equipment.

15. Evidence suggests that for many outdoor activities the level of competency (or expertise) is not a significant influence on the level of enjoyment gained from taking part in an activity.

16. There is some indication that in certain activities enjoyment increases once a basic level of competency has been reached (for example, surfing, kite surfing, sailboarding, paragliding).

17. There is some evidence to suggest gender differences in the experiences sought from outdoor activities. For example, social aspects of an activity appear to be more important for females than for males.

18. There is some evidence to suggest ethnic and cultural differences in the experiences sought from outdoor activities. For example, less concern with individual achievements and more interest in group welfare for those of Asian origin.

19. Outdoor activities are being marketed through segmentation of participants on socio-economic and demographic grounds. There is some evidence that participants are developing pre-conceived notions of what to expect and what they will obtain from engaging in an activity. This has the potential to lead to selfish behaviour, less tolerance of others, and to conflict. It may also lead to disappointment if the marketing does not match an individual's actual experience.

4.3 Operationalisation of the 'rules of thumb' for specific activities

This section attempts to operationalise some of the 'rules of thumb' and explore how they might apply to specific outdoor activities.

4.3.1 The 'specialisation pyramid'

Rock climbing

Application of the specialisation pyramid indicates a small number of dedicated and committed rock climbers at the top level, using the latest technological aids (e.g. sticky rubber boots), and developing and seeking new climbs. A typical climber at this level might seek out more obscure cliffs and climbs, or more remote crags with fewer people. He will be less interested in ticking off routes than in ensuring they are done in good style. He may minimise the amount of equipment he uses or even solo climb to achieve the desired experience.

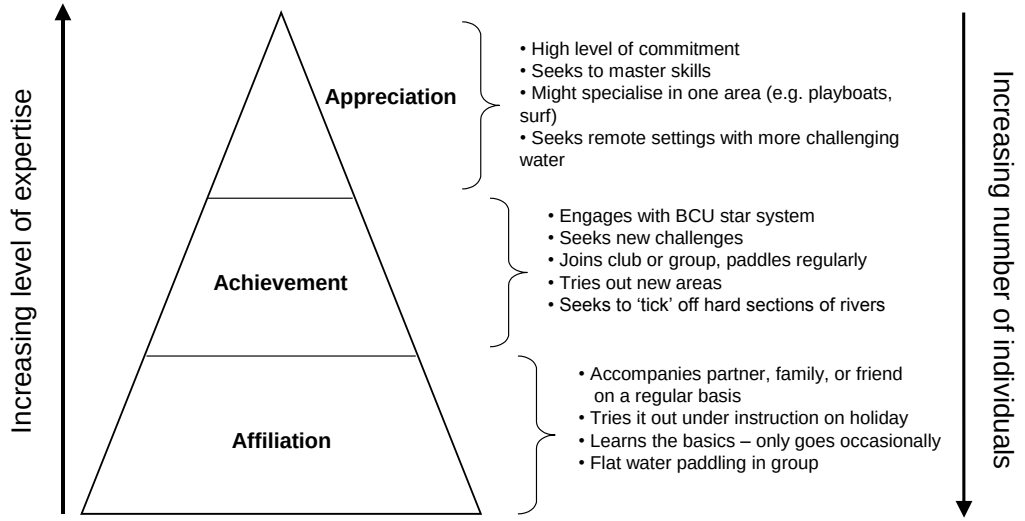
At the next level down there is a larger and less distinct grouping of individuals with a wide range of skills and expertise. This group will include young persons developing their skills and trying to accomplish harder climbs, as well as older or more mature participants with long experience content to maintain their current level of ability which may be lower than in previous years. A typical climber in this group will be keen to tick off routes in a guide-book, may seek out particular climbs that have featured in magazines, or been identified as 'classic'. This layer will also include those who may be specialising in certain types of activity, such as indoor climbing wall competitions, or in 'red-pointing' routes. These participants may have a narrow focus of interest, and specific area in which they wish to achieve rewards.

At the lower level of specialisation there are large numbers or persons trying out climbing through instruction, or learning the basics as an extension to hill walking. Some of those engaging in the activity at this level may purely be there because a partner undertakes the activity and it provides some common ground for a relationship. They may go along with a partner, to hold a rope, or follow someone on much harder climbs than they would want to lead themselves.

Kayaking

When applied to kayaking the specialisation pyramid looks similar to climbing. Those at the top seek remote settings with challenging water, while those in the achievement layer might be entering competitions or working on specific skills associated with the BCU star system.

THE SPECIALISATION PYRAMID – APPLICATION TO KAYAKING



Fishing and the 'specialisation pyramid'

There are fewer persons totally dedicated to fishing such that it takes over most of their leisure time, compared to those engaging at a lower level. This results in a small number of dedicated and committed fishermen at the top level, who may be using the latest technological aids, or even giving up some of the technology to make the task more challenging, or perhaps seeking out more natural areas with unmanaged stocks of fish. A typical fishermen at this level might seek out quieter and more natural areas with few people and no other fishermen, or he may be seeking to master a particular style of fishing (e.g. fly), or seek to become an expert on a particular stretch of water. He will be less interested in catching fish than in the style and process of fishing, and may have a high level of concern for the naturalness and wildlife in the area. He may minimise the amount of equipment he uses to achieve the desired experience.

At the next level down there is a larger and less distinct grouping of individuals with a wide range of skills and expertise. This group will include young persons developing their skills and trying to catch larger fish, or harder to catch species, as well as older or more mature participants with long experience content to maintain their current level of ability, which may be lower than in previous years. A typical fisherman in this group might be keen to enter competitions, may seek 'trophy' fish that exceed a certain size or weight, and may be keen to try new equipment.

At the lower level of specialisation there are larger numbers or persons trying out fishing through instruction, or learning the basics. Some of those engaging in the activity at this level may purely be there because a partner undertakes the activity, or it may be one generation teaching another. There is currently some concern among anglers at the relatively low numbers of young persons taking up fishing, and the influence of commercial fisheries on attitudes towards the sport.

4.3.2 Application of the 'experiential compass'

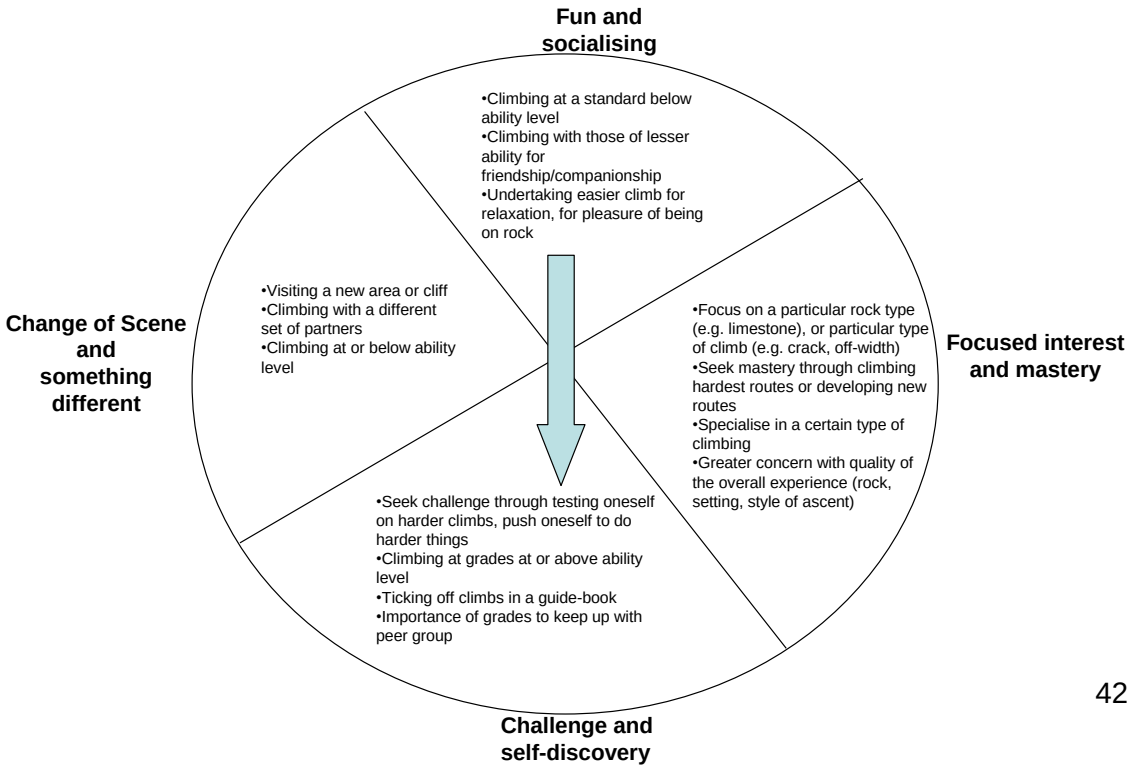
Rock climbing
The diagram below applies the experiential compass to the experiences and conditions sought by rock climbers in the different modes. Those engaging in climbing for fun and amusement will either be beginners starting to learn the skills, those 'having a go', or those climbing below their level of ability for some reason (e.g. to accompany someone of lesser ability). The majority are likely to want easy access, some facilities (e.g. for refreshments) and a safe environment in which to learn, or partake in the activity.

In the opposite mode, that of physical challenge, or mastery of a skill, participants will seek more intense experiences on remote cliffs where there are fewer people, or places where there are very hard climbs and undeveloped cliffs. Provision of a safe environment will not be an issue. Those in the challenge and self-discovery mode may be climbing at or above their ability level, and may want a wide range of difficulties and variable amounts of facilities.

It is clear there is some overlap between the modes of experience and specialisation theory. Those at the top of the pyramid (appreciators) have similar characteristics to persons seeking to master a skill. Those at the affiliation level seek similar experiences to persons in the 'fun and amusement' or 'change of scene/something new' modes of experience.

The theory on modes of experience suggests that individuals can be in different modes on separate visits or at different times during a single visit. An individual at the top of the specialisation pyramid may therefore also spend part or all of a visit in a fun and amusement mode, if he is doing something easy or accompanying those with lower levels of expertise.

THE EXERIENTIAL COMPASS: APPLICATION TO ROCK CLIMBING

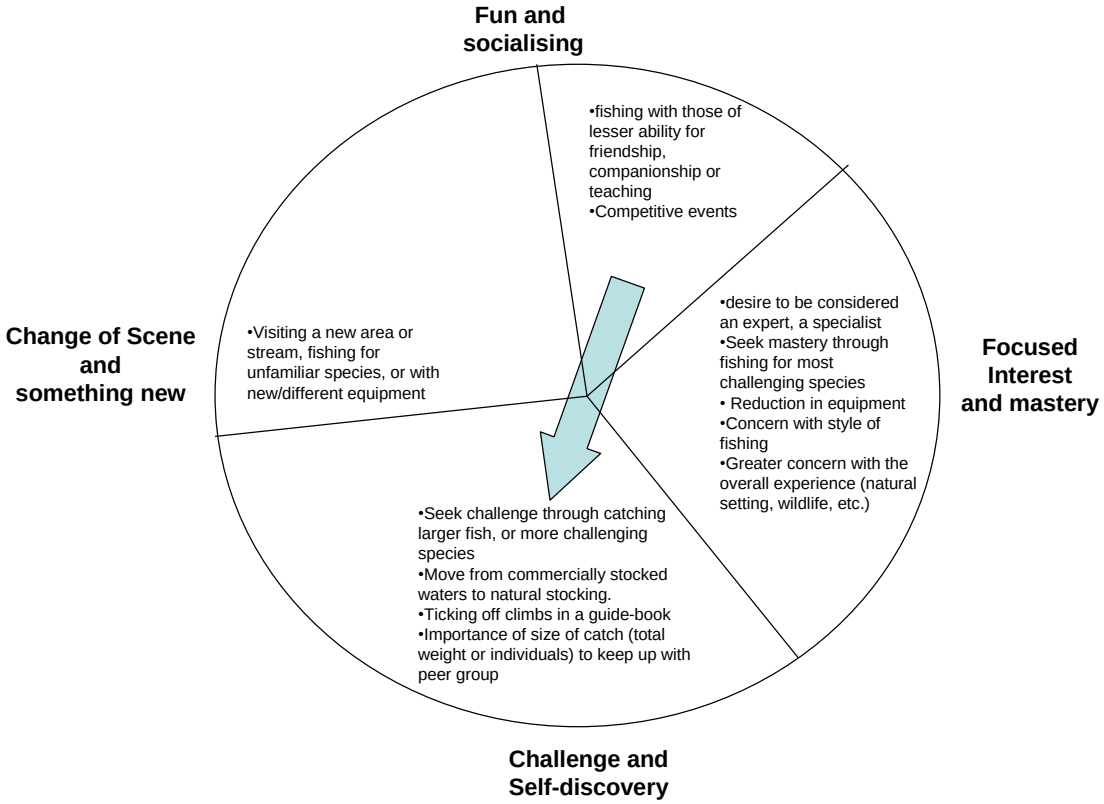


Fishing

The diagram below applies the experiential compass to the experiences and conditions sought by fishermen in the different modes. Evidence in the literature and from electronic forum discussions suggests that 'fun and socialising' are not a major part of this activity; the numbers seeking this mode of experience therefore may be relatively small. Popular media and evidence on the ground suggest that although fishing is seen as a solitary activity, there are times when fishermen will fish for fun (e.g. with children), or in more social settings (e.g. competition, commercial fisheries). The majority are likely to want easy access, some facilities (e.g. for refreshments) and a safe environment in which to learn, or partake in the activity.

In the opposite mode, that of physical challenge, or mastery of a skill, participants will seek more intense experiences in more natural settings where there are fewer people, or places where there unmanaged fish stocks. Those in the challenge and self-discovery mode may be fishing at a range of ability levels, and may seek a wide range of species and conditions, from commercial fisheries with large trophy fish, to smaller more natural and unmanaged settings.

THE EXERIENTIAL COMPASS: APPLICATION TO FISHING



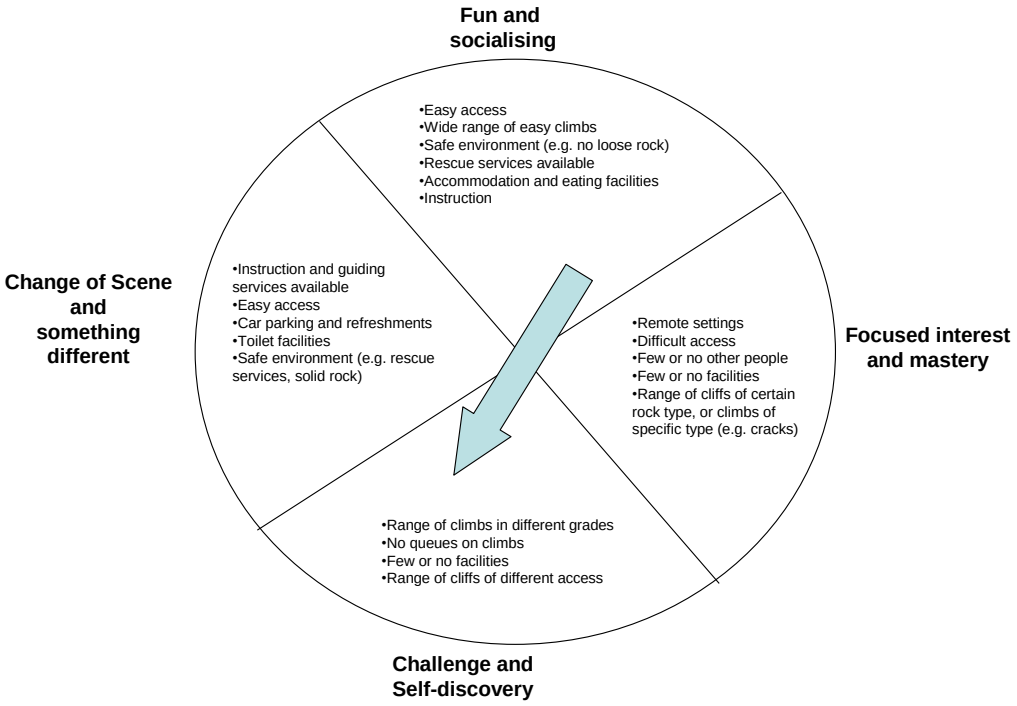
4.4 Management of settings and services

Examination of the two diagrams below reveals that those in the same modes of experience, even when engaged in different outdoor activities, seek a similar range of settings and services. Those undertaking the activity for fun and socialising require ease of access and a safe environment in which to undertake the activity. Secure parking, and access to food and drink (pubs and cafes) are also likely to be important.

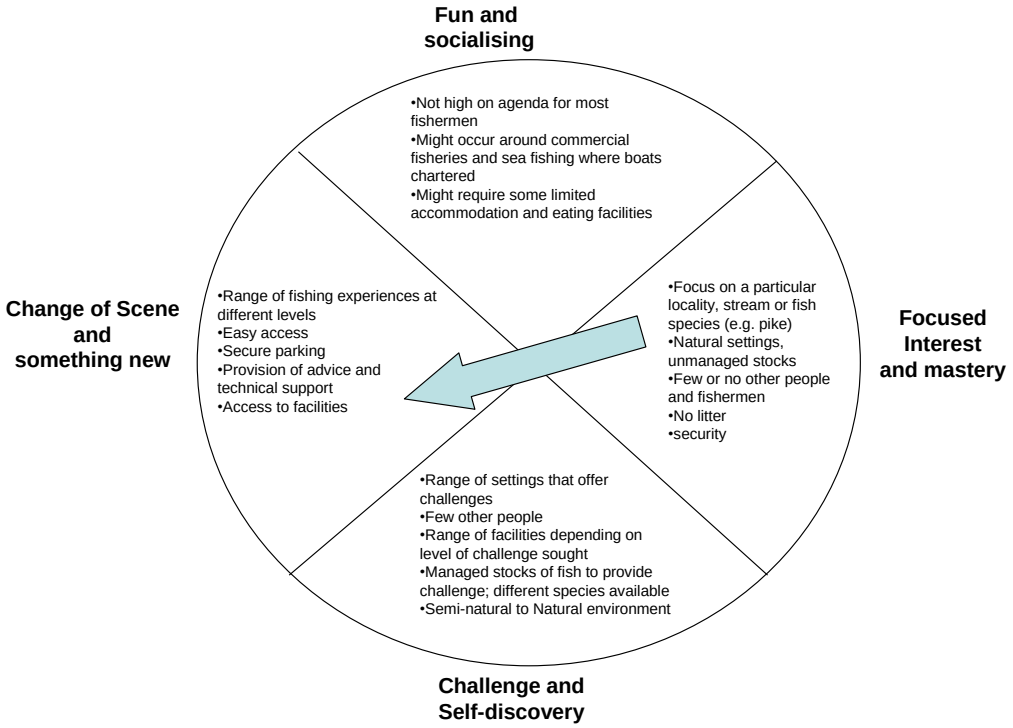
Those seeking an experience involving challenge and self-discovery will be less concerned with service provision, and may actively seek to avoid other people or areas where services are provided. For rock climbers the preferred setting might be a cliff with a range of climbs of different grades. For a fisherman, it might be a fishery with managed stocks of fish.

In both cases those with focused interests or seeking to master a particular skill or area of knowledge, may focus all their attention on a particular locality (e.g. a cliff or a stretch of water), and tend to seek more remote areas with fewer people.

THE EXPERIENTIAL COMPASS – ROCK CLIMBING – SETTING AND SERVICES



THE EXPERIENTIAL COMPASS – FISHING – SETTING AND SERVICES



5. Refinements to the basic theories

5.1 Specialisation theory

Some suggestions were made at a small workshop held in Prestatyn (November 2006) to alter the terminology used and refer to 'competence', 'involvement' or 'engagement', rather than to the term 'specialisation'. It was also suggested there might be two pyramids, one for competitive elements of an activity, and one for non-competitive. We have considered these proposals and decided not to alter the terminology for a number of reasons:

- The existing specialisation pyramid includes information about involvement and engagement. Those at the top of the pyramid are more involved or engaged with the activity than those at the bottom, to the point where the activity has become a fundamental part of their lives.

- Competence is not a helpful term to use, as there may be some persons in the middle of the pyramid (achievers) who are more competent in terms of skills than some of those at the top, but their perspective on the activity may still be one of achieving external rewards (such as winning competitions), while those at the top are focused more on the intrinsic rewards of the activity itself.

- It does not make sense to provide separate pyramids for competitive elements as the competitive element in an activity is subsumed within the central part of the pyramid. Achievers take part in competitive activities, whether formal or informal, which provides some element of satisfaction, and they may never move beyond that level of specialisation.

The workshop did identify some key issues, which require consideration when applying the specialisation pyramid to a particular activity:

- The pyramid might be a different shape for different activities. For example, information from the electronic discussion forums suggests that there are likely to be very few participants in the 'affiliation' layer for certain activities (such as para-gliding and hang-gliding) as participants either acquire the necessary skills quickly (in order to survive) or move away to some different sport. The pyramid for para-gliding might therefore be very narrow. On the other hand evidence on the growth of surfing schools and numbers that have taken lessons suggest that the surfing 'pyramid' might have a very broad base with a large number of persons who have tried, or occasionally partake of the activity, and a very small number of those at the appreciation level.

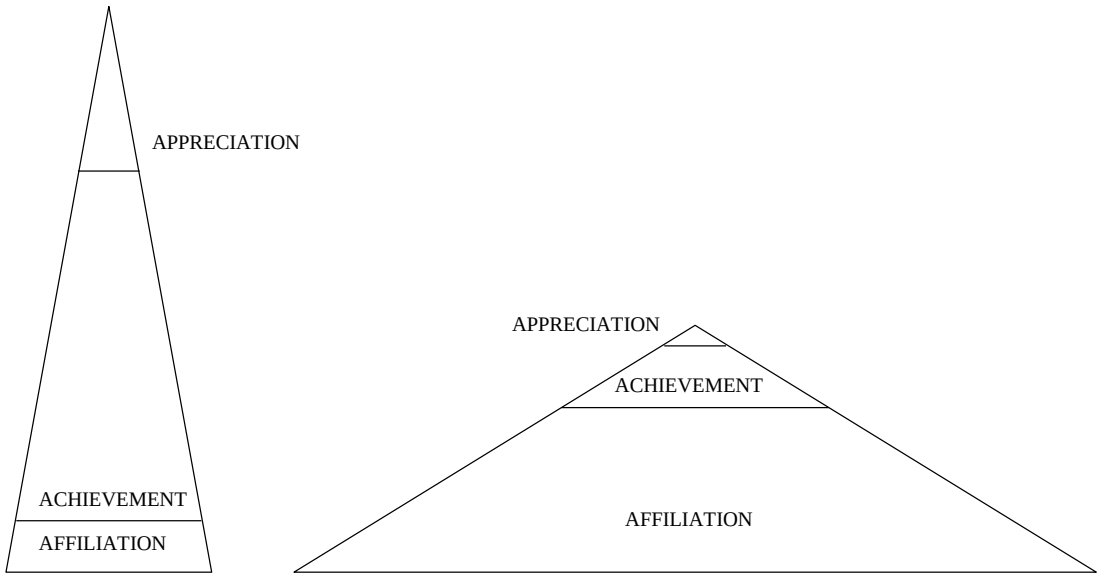
- A number of 'pyramids' could be envisioned within each of the three main layers of the specialisation pyramid. This might represent specialisation within a niche activity or particular competitive element. For example, in motorsports, individuals might specialise in four-wheel driving events, or rally-type events. In fishing, there may be those who specialise in catching a specific species (such as carp), or in entering contests associated with that species, or even those that specialise in organising and running events for others.

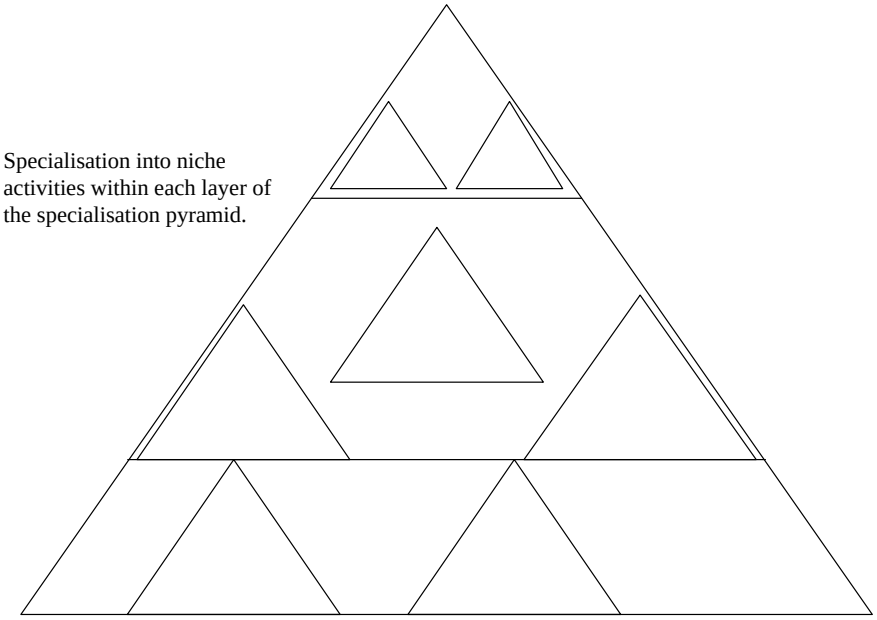
- For different activities, different layers of the pyramid might be more or less important. For example, in motor-sports, the most active and influential participants might be those in the 'achievement' layer. In surfing those in the 'appreciation' layer might be more influential on how an activity is undertaken, as they have more influence on those in lower parts of the pyramid who try to emulate their approach. Much of the media for outdoor activities tends to focus on those participating in the middle layer of a pyramid, the 'achievers'. It is this group that are targeted by equipment manufacturers and sponsored to participate in competitive events, and whose exploits are recorded in the media. The 'achievers', through the media, can be enormously influential in how the activity is perceived by those in lower levels of the pyramid.

- For different activities, communications with the various layers of the pyramid may have to be approached in different ways. In some sports, clubs control a large proportion of the activity undertaken. In other activities membership of clubs is declining (e.g. climbing, kayaking) and increasing numbers are communicating through electronic means, or meeting at organised events (e.g. fell runners, ramblers).

- Affiliates and 'non-participants' are the most difficult parts of the population to engage in education and awareness raising programmes, yet it is these target groups that are important in terms of increasing participation in outdoor activities.

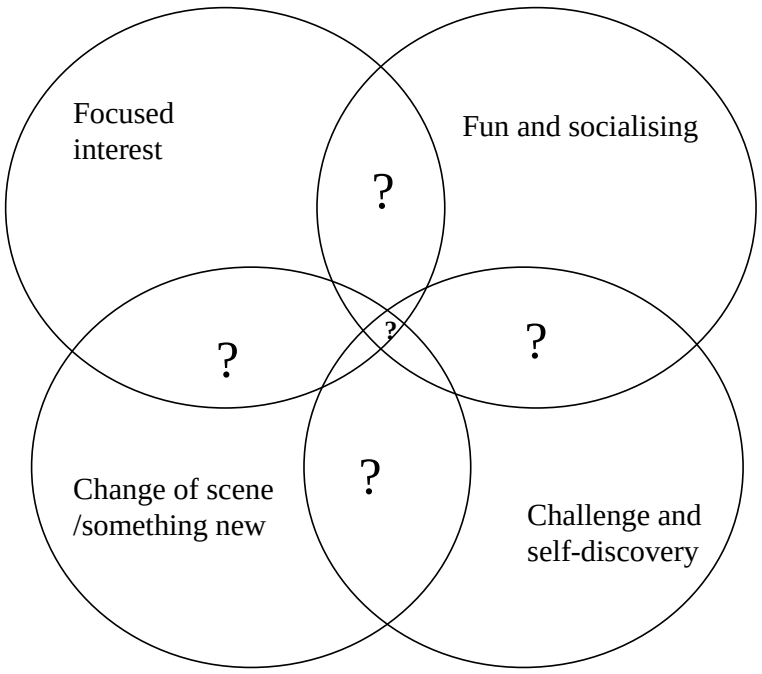
Figure 1: Refinements of the specialisation pyramid to reflect characteristics of different activities





5.2 Modes of experience theory

At a small workshop held at Prestatyn (November 2006) some participants argued that experiences associated with undertaking an outdoor activity were not mutually exclusive and could not be separated out. For example, it was argued that taking part in an activity could involve both socialising and physical challenge at the same time (such as on a sailing boat, or a hill-walk). It became clear that for many persons, the social aspects of undertaking outdoor activities are extremely important and it may not be easy to differentiate the social experience from other forms of experience. This perspective is supported by some of the evidence from the electronic forums that suggest the social aspects of engaging in outdoor activities are important for many people.



Workshop participants noted the subjective nature of the an outdoor recreation experience and commented on how a walk up Snowdon, for example, might be a very different experience for each person.

The suggestion was made that experiences should be shown to overlap, like a Venn diagram, rather than as a compass needle, which can only point to one type of experience at a time. The difficulty with this suggestion is that while it seems to work for some forms of activity, for example, going for a challenging walk with friends, it creates confusion if one tries to overlap other forms of experience, such as 'focused interest' with 'fun and socialising', or, if all the main forms of experience are overlapped. Is it possible to have fun and socialise, maintain a focused interest (in the manner in which it has been defined here), and try something new, all while undertaking a physical challenge? In our view the Venn diagram approach does provide sufficiently robust explanation of participants' experiences from outdoor recreation.

The experiential compass, while not perfect, attempts to filter out the main purpose for a particular visit to an area. The intention is to provide an overall indication for a person's reason for undertaking an outdoor activity, at a particular point in time. On one day it might be for the physical challenge, on another it might be for fun and to socialise with friends. A lot of outdoor activities require teamwork (e.g. climbing, sailing, caving), or cannot be undertaken safely without multiple persons being involved (e.g. whitewater kayaking) so it can be difficult to separate out the social aspects from the other experiences gained. The aim of the experiential compass is to help identify the prime ingredient of the experience from undertaking a particular activity on a particular day in a particular setting.

Participants at the workshop indicated that the natural setting for activities could not be controlled, and it was impossible to separately manage sites for different experiences (for example, on a crag the hard rock-climbing routes would be next to the easy routes).

Participants also indicated that the attitude of local residents and service providers was an important factor in an outdoor recreation experience. The 'warm welcome' was felt to be important for all types of outdoor activity.

5.3 Risk

A large body of work suggests that for some people outdoor activities are related to risk and the desire for excitement, or the 'adrenalin rush'. In some cases outdoor activities are marketed to promote this aspect, for example, activities such as surfing, climbing and skiing that are promoted as 'extreme' sports.

Risk is a complex area and there are suggestions that in a risk-averse world, increasingly concerned with safety, and with many life-threatening situations (war, disease, famine) controlled, people will seek out experiences that contain an element of potential danger or harm. Evidence (see section based on electronic discussion forums) from participants in a range of outdoor activities suggests that uncontrolled risks are not welcome. The electronic discussion groups indicate that participants in caving, diving, climbing and other activities, which may be perceived by the general

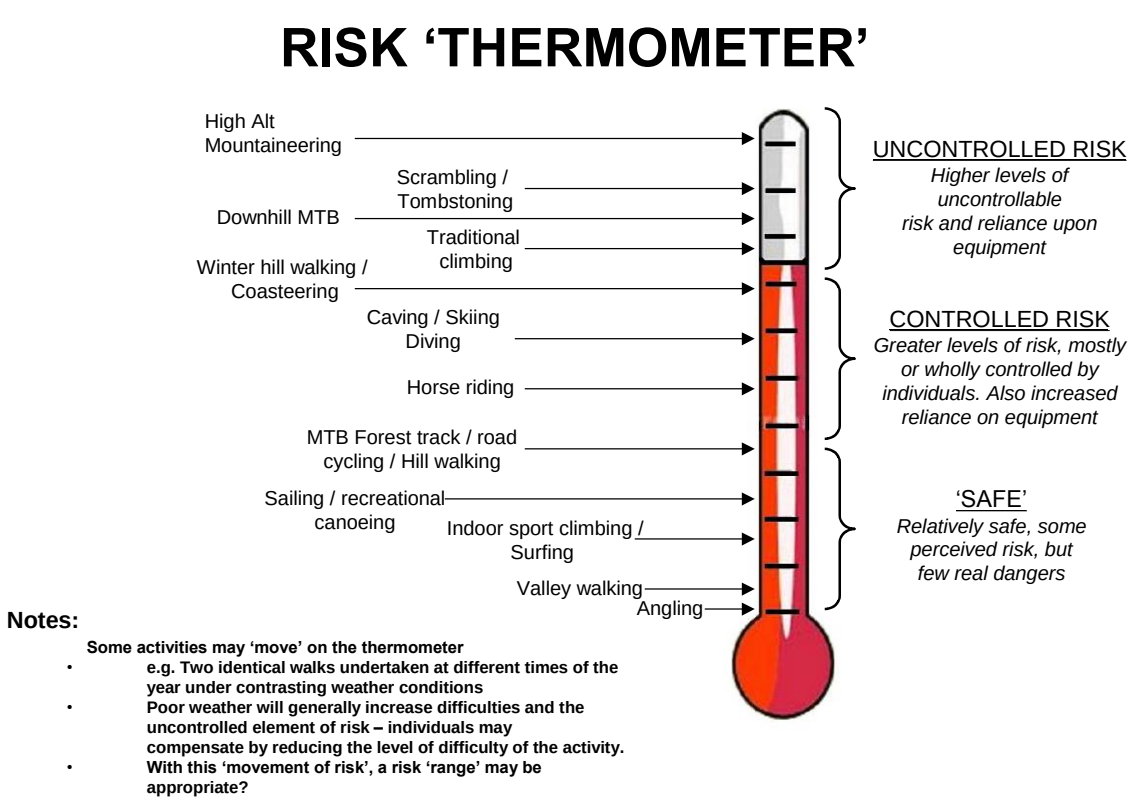
population as containing serious elements of risk, do not consider their chosen activity as being 'risky'. Participants are concerned with controlling and minimising risk, either through development of skills, or application of specific technology or knowledge. Risk and uncertain outcomes are viewed as elements to be avoided.

Perceptions of risk differ between persons. Perceptions alter as skills are acquired, for example, the risks attached to undertaking a climb with limited protection may diminish as competence and skill increase. Perception of risk may also be based on an individual's characteristics; there is evidence to suggest that some people are risk averse while others seek out activities with more uncertain outcomes. There is also some evidence to suggest that gender and age play a role. Females tend to be more risk averse than males, and older people more risk averse than younger people. It is not possible to categorise activities based on perceived risk as everyone has a different perception.

We have tried instead to categorise outdoor activities on the basis of the level of 'uncontrolled' risk, i.e. elements of an activity that are outside the control of the individual. The risk 'thermometer' presented below provides one example of how this might operate in practice. Activities are placed on the thermometer in relation to the level of uncontrolled risk involved in participation. At the low end of the thermometer the activities are generally safe, where all dangers and the potential for harm can be controlled by the individual. This might be because there are few dangers involved (e.g. fishing), or the dangers can be minimised through the acquisition of skills or certain equipment. At the higher end of the thermometer the level of uncontrolled risk increases and there may be more objective dangers (e.g. risks from bad weather, avalanche, or hypothermia in the Himalayas), or increasing reliance on equipment (e.g. mountain bike downhill racing).

One problem with a risk-based approach is that it leads to endless debates about where certain activities are placed on the thermometer. This depends to a large extent on the manner in which an activity is undertaken by an individual. For some activities the individual can increase or decrease the level of risk (associated with making a mistake). For example, a rock climber can place less protection, or climb solo (without a rope), or a hill-walker can go out in bad weather, or into more remote locations where rescue is more difficult and might be impossible, a horse rider can try more difficult jumps, a surfer can try bigger waves.

As a means of categorising participants in outdoor recreational activities risk is a difficult concept to utilise. At the Prestatyn Workshop a number of issues related to risk and the risk thermometer were discussed. It was suggested that 'risk' is perhaps an unsuitable term to use in relation to outdoor activities (due to negative



connotations regarding Health and Safety), and that 'adrenaline' or 'excitement' may be more appropriate. An adrenaline or excitement thermometer might be more useful as a tool for raising awareness (as you can promote excitement – but not 'risk').

Workshop delegates noted that in many cases people might be attracted to an activity because of the perceived risk, rather than the actual level of objective danger (i.e. uncontrolled danger or potential for harm) that exists. The issue of how to manage perceived risk vs actual risk was highlighted, particularly when risk/excitement is viewed as a means of attracting young people to an activity (e.g. dealing with the 'rambling is boring' syndrome).

We suggest that using risk to categorise either participants or activities is not a useful approach, due to the complexities surrounding the measurement and understanding of risk, and the subjective nature of what constitutes a 'risky' action. Individuals will determine the levels of risk they feel comfortable with either through selection of particular activities and avoidance of others, and/or through engaging in risk minimisation behaviour. Neither does it make sense to use 'excitement' as a means of categorising activities since what is exciting to one person might be dull and boring to another, or frightening to someone else. This is not to downplay the elements of risk involved in some outdoor activities, or the excitement from, for example, canoeing a set of rapids, but these experiences need to be placed in a broader context of the recreational activity and its setting in the countryside. Much of what outdoor recreation has to offer comes from facing physical and/or mental challenges and acquiring the skills to overcome and master those challenges. The lasting rewards come from a more sustained engagement with the activity, long enough to

develop the skills that allow the individual to face the challenges offered, and not from paying some more experienced person to take the decision over the level of engagement that might either be boring or exciting for a set of individuals, but is unlikely to satisfy all equally.

The issues of risk/excitement, and acquisition of skills to overcome physical challenge, do raise issues regarding engaging non-participants in outdoor activities that need to be addressed. Focus on the dangers, the excitement and the adrenalin rush from an activity, may put off those who would otherwise become engaged, and learn the skills that provide the means to meet the challenges and lead to increased enjoyment.

5.4 Integrating the theories

A classification approach based on the potential experiences to be gained from outdoor recreation (for example, social benefits, fun, mastery of skills, meeting challenges) appears to be sound. This approach can avoid the confusion over risk and people will not be disappointed when activities billed as 'fun' and 'exciting' do not live up to expectations.

The specialisation pyramid approach states those at the highest level (the appreciators) seek the longer-lasting intrinsic rewards from engaging in activities. Both of these theories (modes of experience and specialisation), and theories about 'flow', suggest there are intrinsic rewards to be gained from mastering a set of skills, which allow the individual to overcome a physical and/or mental challenge. The rewards can be gained at almost any level of engagement with an activity once some basic skills have been acquired. The key requirement is that the skills of the individual must match the challenge faced in such a way that some effort is required to overcome the obstacle, but the risks are not too great that fear becomes the overriding experience.

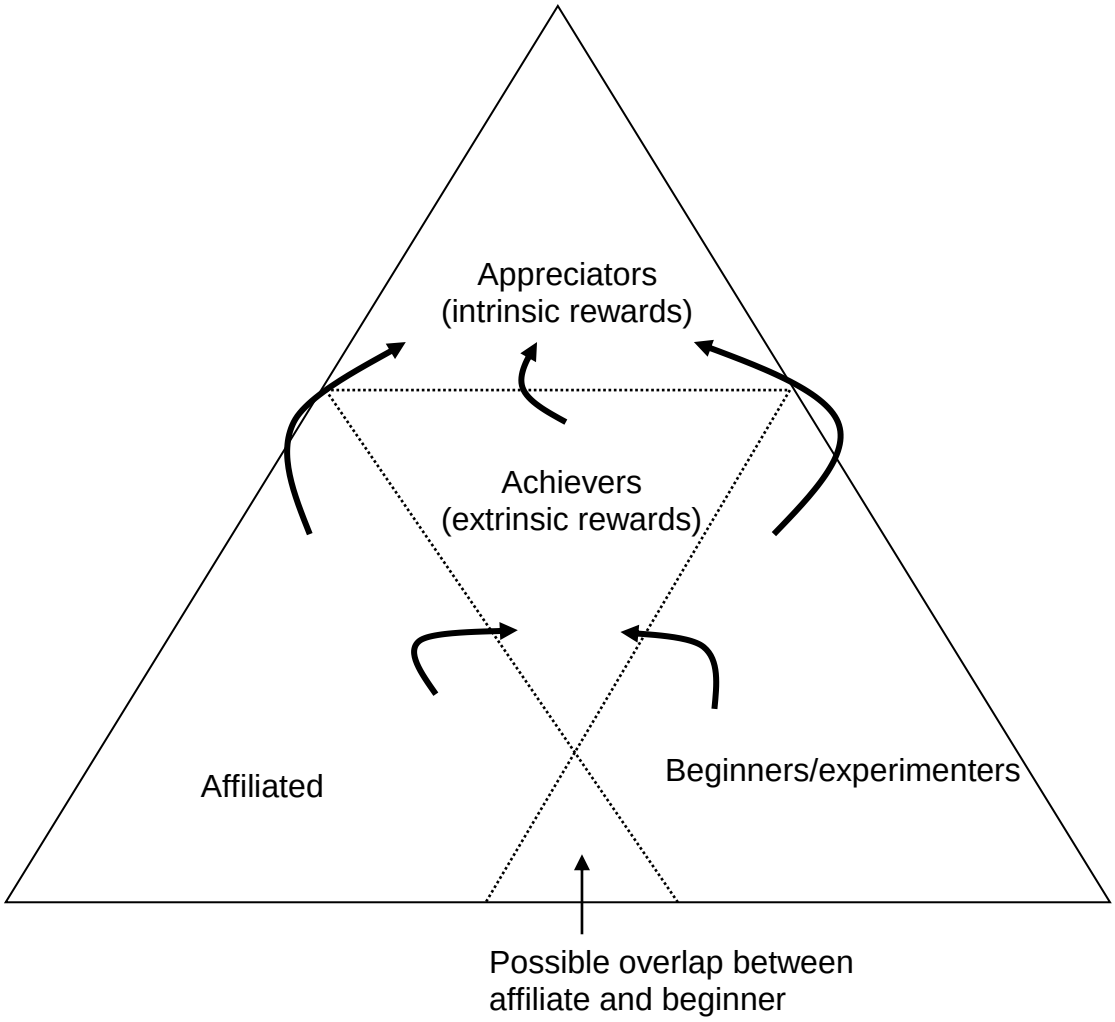
Specialisation theory suggests that participants who have mastered a set of skills are able to enjoy the activity without the need for external rewards offered by competitions or ticking off lists. Research on modes of experience indicates that physical challenge is a prime experience sought from outdoor activities, that may or may not be motivated by external rewards. Risk and thrill seeking is not the prime motivation of most participants in outdoor recreation, rather it is acquiring skills to minimise risks. Stebbins refers to 'serious leisure' as that which offers participants long-term benefits without the need for external stimulation (generated, for example, through formal competitive events). The section below tries to integrate these ideas into a means of categorising participants.

A simpler approach to classifying participants might be to focus on the factors driving a person to participate in an activity. For example, is it the mastery of skills, or the physical challenge that is the underlying reason for participation in an activity, or is it for socialisation reasons, to be with friends, or to maintain a relationship? If the physical challenge is the attraction it is helpful to understand whether the reason for engagement with the challenge is for external reward (status, prizes, greater respect), or for more intrinsic reward (enjoyment of the activity itself, personal sense of achievement). The diagram below suggests there are four broad categories of participant in any activity.

Affiliated	the activity is not the primary motive for participating; participation is linked to social or other aspects, such as providing companionship, developing a relationship, (being a spectator?).
Beginners Experimentors	there are now many opportunities for persons to have a go at new activities; school trips, activity holidays, adventure companies; also more traditional routes through joining a club; participants may only try the activity once, or may have several goes before deciding if they want to pursue the activity through training and learning the skills. Beginners will be acquiring knowledge of the rewards offered and may be attracted to the achievement of extrinsic rewards, or the more intrinsic rewards.
Achievers (extrinsic rewards)	those participating in order to achieve awards, money, or recognition for their achievements (can include birders who maintain lists, mountaineers who are 'munro' baggers, hunters who want to attain a trophy animal); those entering competitive events, or acquiring sponsorship in order to continue to undertake the activity; look for challenge and mastery of skills in order to perform better than others, or to achieve externally established objectives (e.g. run a marathon within a specific time).
Appreciators (intrinsic rewards)	those participating for the enjoyment of the activity itself; not seeking external recognition or status from their achievements; may still seek challenge and mastery of skills but only in order to satisfy personal goals.

The 'participation' pyramid below tries to extend the theory of specialisation and suggests that in practice the situation might be much more complex than a series of three or four clearly defined 'layers'. The diagram illustrates the idea that a particular recreation activity may consist of a series of 'sub-pyramids' which themselves may be of different shapes and sizes. It suggests that the lower layers will be made up of those trying out an activity (experimenters), beginners learning the basic skills, and those affiliated in some way. There may be some overlap between affiliates and beginners (some affiliates, having attempted the activity may stop participating or move on to something else). The achievers might make up a significant proportion of those who participate regularly.

The 'participation' pyramid



The diagram also suggests that the boundaries between the different parts of the triangle are permeable. Participants may try out an activity, decide they like it and start learning the skills, then move from there into undertaking the activity for extrinsic or intrinsic rewards. The triangle shape also suggests that participants are likely to move in time from the lower parts to the upper part. This movement may be relatively quick or more slowly passing through other parts of the triangle first. Once a person begins to undertake the activity for intrinsic reward they are unlikely to move back down to lower parts of the triangle.

This approach to classifying participants may influence management of activities or of areas where activities take place. It requires countryside managers to understand the motivations of participants. If large numbers of participants in an activity, surfing for example, are either beginners or affiliated then a specific level of services might be required (e.g. higher levels of food/accommodation provisions; greater provision of lifeguards). If large numbers of participants in fishing are appreciators seeking intrinsic rewards then competitions and crowded river banks might be avoided.

Understanding the experiences desired by different types of participant might also help countryside managers develop solutions where environmental damage, or conflict between activities is occurring. Those engaged in an activity for external rewards are less concerned about the presence of other people and the setting than those seeking intrinsic rewards. Certain types of activity may potentially be concentrated in one area without conflict (for example mountain biking and mountain boarding contests).

Identification of the numbers and characteristics of those engaged in different parts of the triangle will require some empirical data collection, and not second-guessing based on anecdotal evidence. A small amount of surveying effort, directed at trying to identify the 'participation drivers' for those engaged in various outdoor recreation activities may pay large dividends in terms of improved understanding of what experiences are sought from different recreational activities and where the commonalities lie.

6. Conclusions and further research

Understanding the nature of participants in the range of outdoor activities found across Wales is an important step towards creating effective management processes. Little is known in the UK about how people participate in outdoor recreation (e.g. are they 'achievers' or 'appreciators'?), nor what motivates some to participate and others not to participate. The following sections identify some potential areas for further exploration that might improve understanding of participation in outdoor recreation.

6.1 Developing the 'participation' pyramid

This project has suggested (in Section 5) that the 'specialisation pyramid' offers a sound foundation for classifying participants in outdoor recreation, and may even through some light on the motivation and experiences of participants. But the project has shown that the pyramid is not as simple as theory suggests and needs some refinement. The pyramid may not be made up of just three separate layers but is more likely to consist of a set of smaller pyramids representing at least four types of recreation participant:

- Affiliated
- Beginner/experimenter
- Achiever
- Appreciator

The smaller pyramids are likely to be of different shapes and with permeable boundaries to indicate that participants move from one classification to another. For different activities the set of pyramids are likely to be different shapes. An exploration of angling, rock climbing, and fell-walking, for example, may provide some useful data on which to base management decisions for those activities.

Further research should explore the theory in a UK setting and try to ascertain the following:

- The number of layers or sub-pyramids and how they are connected (i.e. the permeability of boundaries and the manner in which participants move from one to another)
- The characteristics of those within each sub-pyramid or layer
- quantify the numbers and thus the shape of each sub-pyramid or layer
- understanding the nature of intrinsic and extrinsic rewards that are sought and whether there are differences between gender, age and socio-economic group
- how this understanding might be utilised in the management of outdoor recreational activities.

6.2 Engagement with stakeholders

CCW should make efforts to understand the characteristics of stakeholder representatives. Different bodies may not always be representative of the majority taking part in an activity and are most likely to represent those either in the appreciation or achievement layers. The Welsh Canoe Association, for example, is considered to be the national governing body for canoeing and kayaking in Wales yet membership is small, made up largely of those in the 'middle' layer of the pyramid and focused on achievement, particularly in terms of development of skills and competitions. Little is know about the large numbers of canoeists that are not members, and what motivates them to participate, or what they seek from engagement in such activity. Greater awareness of the numbers and characteristics of those engaged in an activity, and the make-up of representative bodies will help CCW personnel when talking to the wide range of stakeholders concerned with outdoor recreation.

6.3 Engaging with 'affiliates'

In many activities there tends to be a large number of persons 'affiliated' in some way. Some surveys (e.g. Mintel) have referred to these as 'dabblers', people who only partially engage in an activity. There is little information about the characteristics of these groups, and how they might vary across activities. Affiliates may include the following:

- Beginners
- Young people
- Those who lack the resources to access the countryside and/or activity very often (e.g. due to cost of the activity, or lack of transport)
- Persons who engage in an activity for companionship or relational reasons
- Persons who engage for 'status' reasons (e.g. the activity is considered to be 'cool')
- Those who engage for health reasons (e.g. a gentle walk in the country)

Further research should be targeted at gaining a more holistic understanding of participants where the 'affiliated' layer of an activity is thought to be particularly large. Improved understanding of 'affiliates' should help in identifying numbers involved, characteristics (gender, ethnicity, age, socio-economic status), needs (e.g. in terms of service provision, public transport, education and awareness), and latent demand.

6.4 Modes of experience

Little is known about experiences of participants in different activities. Only limited research has been conducted outside of the UK in order to understand what motivates people to engage in outdoor activities. The rewards from physical challenge and self-discovery are two aspects that have been widely cited for some time (leading to outward bound and other education programmes using the outdoors in development of young people), and these are often the characteristics portrayed in the popular media, with its focus on achievements in sport and outdoor activity. For some these external rewards might be enough, while others seek intrinsic rewards gained from mastery of a skill or some aspect of the natural environment. There is

some research (e.g. the flow theory of Csikszentmihalyi and the serious leisure of Stebbins) that suggests the long-lasting rewards from outdoor recreational activities only come from 'deep' engagement with an activity where mastery of a skill is more important than achieving particular goals.

Some empirical UK focused research to explore the nature of the rewards sought from particular outdoor recreation activities would improve understanding about why people engage in particular forms of activity, the learning process through which they travel, specialisation and the development of niche activities (e.g. bouldering), and possible differences between gender and age groups. It may also throw light on why there are such low numbers of participants in the 'appreciation' level of activities.

This project (exploring the academic literature and electronic discussion forums) has suggested the importance of the social aspects of many outdoor activities. Even when physical challenge and achievement appear to be the main drivers of engagement in an activity the social aspects are still very important. Little is known about whether the social aspects of an activity, and desired service provision differ between 'affiliates', 'achievers' and 'appreciators', or between different activities. Some research in the USA and Canada has suggested the importance of social and community aspects of activities for certain ethnic groups, which can have repercussions for service provision (e.g. the importance of family ties leading to larger groups). Increased awareness of this aspect of outdoor recreation might assist in improving management of activities and design of facilities. Further research should be directed at the following areas:

- Exploration of importance of the social aspect in different activities
- Understanding preferred service provision (e.g. car parks, cafes, pubs, visitor centres with changing rooms and places to meet)
- Provision of information and advice on services available
- Variable needs of affiliates, achievers and appreciators
- Understanding needs of ethnic minorities

6.5 Outsiders and the 'warm welcome'

Local residents may view participants in outdoor recreation as annoying or even damaging to certain aspects of rural life. Participants themselves seek a welcome from local residents. Wales is recognised as a prime recreational resource for many outdoor activities but service provision is often considered poor. This may have significant impacts on local economies with some activities having little or no economic impact on the areas visited. Research directed at understanding the views of local residents towards recreational participants might help improve understanding and awareness on the part of both visitors and residents, and identify ways of increasing contributions to the local economy.

6.6 Risk

Risk in relation to outdoor recreation has been identified as a complex area which may put some people off participating while attracting others. The excitement and 'adrenalin' rush factors have certainly been used in marketing of some activities (such as abseiling, white water rafting). Some empirical research in the UK that explores perceptions of risk for a range of outdoor activities might throw some light

on why certain groups do/do not engage in particular activities. But this is a complex area where 'perceived risk' may moderate or enhance the appeal of an activity to an individual. Risk does not appear to be a worthwhile area for exploring participant recreation, or for using as a foundation for categorising participants in outdoor recreation.

APPENDIX 1

EXAMPLES OF MARKET SEGMENTATION

Ecotourism

A Mintel study on Ethical Holidays UK, October 2005 (http://academic.mintel.com) defines eco-tourism as "an environmentally based tourism experience, which has a low impact on the natural environment, preserving the long-term nature of the product". The report divides ethical tourism into:

- Walking, trekking, and cycling holidays
- Eco-tourism
- Community tourism
- Volunteering

A Mintel report on bicycles (November 2005) divides cyclists into:

- Young consumers
- Adult consumers

A report on Holidays and popular destinations (Mintel, 2005) divides holidays as follows:

Short vs long
Inclusive vs independent
Market segmentation as follows:
Beach/resort holidays
City breaks
Coach tours
Holiday centres

Holiday target groups are described as follows:

- Culture driven (24% of a sample or 11.7 million adults)
- The choosy (14% of sample or 6.8 mill adults)
- Weather driven (29% of a sample or 14.2 mill adults)
- The laid back (33% of a sample or 16.1 mill adults)

Much of the work of this type is characterised by the regular Mintel market reports on different activities, or on tourism markets. Some examples are presented below.

Demographic groups are divided as follows:

Age	called 'lifestages'
Pre-/no family	aged under 45 who are not parents (28%)
Family	any age with at least one child aged under 16 and still at home (28%)
Third age	aged 45 – 64 with no children under 16 (25%)
Retired	aged over 65 with no children aged under 16 (20%)

In many of these studies markets are also divided by ACORN group - and by type of media used (e.g. internet users, broadsheet readers, mid-market tabloid readers) but these groups only contain sections of the population and do not account for all adults.

APPENDIX 2

WHO DOES WHAT?

Shooting Sports

In the UK an estimated 480,000 people shoot live quarry resulting in an estimated 970,000 shooting days per year. (PACEC, 2006).

There are estimated to be 61,000 providers of shooting in the UK 80% of whom provide pigeon shooting and more than two-thirds provide rabbit shooting. PACEC (2006) estimate that 93% of shooters are males over the age of 40 years. The majority are involved in driven and walked-up lowland game and in pest control. Many shooters engage in more than one type of shooting. Overall , two-thirds of participants spend a minimum of ten days shooting per year, much of which takes place close to the place of residence.

In Wales there are an estimated 2,700 shooting providers and approximately 110,000 people participating leading to an estimated 0.6 million gun days per year.

Table 1: Estimated number of shooting days, UK (PACEC, 2006)

Activity	**providers**	**Ave. days/provider**
Driven lowland game (e.g. pheasant, duck)	26,000	150,000
Walked-up lowland game	25,000	110,000
Grouse	1,600	5,700
Deer stalking	17,000	150,000
Coastal wildfowling	3,800	19,000
Inland wildfowling	16,000	39,000
Avian pest control (e.g. pigeon)	48,000	340,000
Mammalian pest control (e.g. rabbit)	39,000	150,000
Total	61,000	970,000

Angling

A report by MAFF (2000) reported a 1994 study that estimated there were 1.1 million sea anglers, 2.3 million coarse anglers (defined as people who had fished during the previous two years) and 0.8 million game (salmon, sea trout and trout) anglers in England and Wales. Estimated total expenditure on the sport by participants was in the region of £3.3 billion per year. Inland fisheries are estimated to contribute £35 million per year to rural economies in Wales.

An Environment Agency report (2005) suggested that the numbers of anglers remains high but has not increased since the mid 1990s.

Estimates of anglers in England and Wales (two samples: 419 12 – 16 yrs of age and 1, 839 aged over 15 yrs)
13% of the sample aged over 12 said they had been fishing in the previous two years. This would equate to 5.8 million persons.

9% of the sample over 12 had been fishing in the previous year (4.2 million people). This greatly exceeds the 1 million people who purchased a rod licence for the previous year.

A further 4.4 million people were estimated to be interested in going fishing in the future even though they had not fished in the previous two years.

Anglers are mainly male (75%) with a relatively high proportion aged 15 – 24 yrs. 94% of the sample were white, while 3% were Asian.

Among the 12 – 16 year age group 19% had been freshwater fishing in the previous two years and a further 20% were interested in going fishing in the future. This suggests a total of 39% of the sample in this age group has an interest in fishing.

A survey of sea angling by Drew Associates (2004) suggests 1.1 million households contain at least one person who has been sea angling in the previous year. Participation was found to be highest in north east England, the south of England and Wales. 54% of sea anglers fish from the shore, 23% from private boats, and 22% from charter boats. Mean number of days angling was 11.3 days per year but nearly a quarter of the sample said they had only fished for one day in the last year.

Participation is spread across all social classes. 6% of AB households and 5% of C1C2 and 4% of DE households have a fishing member.

Most anglers are male (97%) and had been fishing on average for 25.7 yrs.

Recreational values reported by anglers relate to obtaining a sense of relaxation and peace of mind.

Nature and Bird Watching

The RSPB has over a million members, including nearly 150,000 youth members and over 13,000 volunteers. It has 182 nature reserves covering 126,846 hectares, home to 80% of our rarest or most threatened bird species. It has a local network of 175 local groups and more than 110 youth groups.

The RSPBs annual review programme had 419,000 garden bird observers compared to 314,000 in 2005.

Walking

Mintel (2005) estimate that 12% of the UK population over the age of 15 yrs engage in hiking/rambling on a regular basis in 2005. This shows an increase in 3% since 2000. A further 10% occasionally participate in hiking/rambling. The activity appeals to both men (47%) and women (53%). Hiking and rambling show the oldest age profile of sports activities (in a survey undertaken by Mintel on Sports Participation, 2005). Only 10% of hikers and ramblers are under age 25 and one-third are over 55 yrs. Around two-thirds are married and one–third single. 37% are not working and 23% retired.

Around 44% of participants are in the AB socio-economic grades but spend little on sport's related goods. Over half (54%) of hikers spend £100 or less per year on their activity.

The 2002/2003 England Day Visits Survey reported 31.3% of all countryside trips made from England were for walking and that walking is more popular with older adults (35-74) and higher income groups. Interestingly there was a very high incidence of single people on walking . (8% of walking trips are reported by white British respondents with a further 2% being other white respondents. This is virtually the same mix evident amongst all countryside visitors although in this instance Black and Asian British respondents manage a combined total of 1%.

Fell Running

The Fell Runners Association was formed in 1970 to cater for the needs of fell runners throughout the country. It now has 4500 individual members. Nearly 300 athlectic clubs are involved with fell running through their regional athletic associations.

Mountain biking

The 2002/2003 England Day Visit Survey reported that 4.3% of all countryside trips were for mountain biking or cycling.

A study of 500 mountain bikers in New Zealand (Cessford, 1995) noted the main characteristics of bikers as: 85% male, 61% under the age of 29, and only 12% over 40 yrs. Only 10% had been riding mountain bikes for more than 5 yrs. 12% of the sample characterised themselves as beginners, 24% as moderately experienced, and 64% as very experienced or expert. There were gender difference, 42% of females classified themselves as beginners and only 7% as experts. The majority of riders indicated taking part in other outdoor activities. Running, road cycling, 'tramping', walking and skiing were the most commonly mentioned.

The environmental setting preferences and experiences sought were found to vary with rider experience and expertise. Overall the sample indicated that 'experiencing speed', 'exercise' and 'scenery' were the top three features sought from mountain biking. There were some differences although 'appreciation of views/scenery/nature', 'socialising with friends' and 'exploring new areas' appeared to be of a similar level of importance to all riders.

As expertise increases the technical challenge, physical challenge, and racing became more important. 'Speed/excitement/risk' also appeared to be consistently important for the experienced riders. In contrast 'relaxation/easy riding/cruising' and 'peace/quiet/solitude' became less important.

Powell at al. (2003) carried out a small study of mountain bikers in Wales as part of a study on horse riding. A sample of 42 mountain bikers were interviewed in the countryside at two locations.

Characteristics of a sample of mountain bikers in Wales, 2003 (n=42)

Type of rider	
Local	33%
Day visitor	43%
Tourist visitor	14%
On a cycling holiday	9%
Type of companionship	
With family	7%

Alone	14%
With group of friends	55%
Alone with a friend	17%
Organised group	7%
Place of Residence	
Local area	36%
Rest of Wales	7%
England	55%
Abroad	2%
Frequency of riding in the specific area	
Weekly	25%
Monthly	25%
Several times per year	32%
Once per year	7%
Less than once per year	10%

Individuals were asked what attracted them to cycle in the area. Less than one fifth (19%) indicated the landscape as important while nearly two-thirds (64%) indicated the quality of trails was important. 19% noted the trails were well waymarked and less than 5% indicated the attraction was the lack of other types of user. Only 7% indicated conflict with any other type of user and three-quarters of the sample felt the number of cyclists was just about right, only 8% felt there were too many mountain bikers in the area.

The International Mountain Biking Association (IMBA) has estimated the number of mountain bikers in the UK as follows:

	No. of mtn bikers	no. of rides/yr
Family/casual	3.0 million	9.0 mill
Regular trail cyclists	1.2 million	19 mill
Enthusiasts	1.3 million	50 mill
Total	5.5 million	78 million

(Source: September 2005)

A Mintel study (July 2005) estimated that 1.2% of the UK population aged over 15 yrs take part regularly in mountain biking (regular means at least once per month). This equates to just over half a million persons.

Off-Road Vehicle Driving

A recent study (Defra, 2005) on the use of motor vehicles on Byways open to all traffic (BOATs) estimated an average 6.4 million motor vehicle kilometres per year on 4,171 km BOATs in England. Considerable variation was found ranging from zero motor vehicles on some byways to over 20 vehicles per day at some busier sites. Overall 40% of the motor vehicle movements were associated with land management, 38% were recreational and 20% associated with access to dwellings.

Three types of recreational use were noted:

- Experience of driving along the byway itself (i.e. ‘rambling’ in a motor vehicle)
- Use of byways to access country sports

- Use of byways to access land for other activities (e.g. climbing, canoeing, walking, wildlife watching)

Reid (2005) reports that problems of off-road motorcyclists in Lanarkshire were resolved through formation of a club and provision of facilities for off-roading. In 2004, the 608 members of the club completed 19,500 km of motor-cycling. Half of the members are aged between 3 and 12 yrs, 40% are 12 – 18 yrs and only 10% are adults.

Horseriding

An estimated 2.4 million people in Britain ride. (Defra, 2004)

A British Equestrian Trade Association report (BETA, 2006) conducted a survey of 5,000 households in Britain and estimated a 44% increase in the number of riders since 1999. The study estimated that 4.3 million people (or 7% of the GB population) had ridden in the previous 12 months. Nearly 50% of those riding in the previous 12 months reported riding regularly (once per month or more) amounting to an estimated 2.1 million people. Of these, 11,000 'drive' a horse, the rest ride.

An estimated 1 million households in GB have at least one person who is responsible for the daily upkeep of a horse.

A survey of horse riding in Wales by Powell, et al. (2003) estimated a total 23,000 horse riders residing in Wales and 0.341 million visitor riding occasions per year. A total of 2.8 million riding occasions/year was estimated for local riders. Four types of rider were identified:
Local riders (44% of the sample), those living within 20 miles of the location they were interviewed while riding
Day visitors (24% of sample) living more than 20 miles from the area where riding and visiting for one day only
Tourist visitors (15%) of the sample, visitors staying more than one day in the area and undertaking a range of activities
Riding holiday visitors (17%) – on a multi-day trip specifically for horse riding.

The survey was based on a sample of 25 riding centres and 223 horse riders interviewed in Wales. Overall 31% of the sample categorised themselves as novice riders, 23% as intermediate, and 46% as experienced riders.

Characteristics of horse riders in Wales (n=223)

Place of residence:	
Local (< 20 miles)	44%
Other parts of Wales	10%
England	37%
Abroad	10%
Ownership of horse (local riders)	35%
Frequency of riding – local riders	
Daily	27%
Weekly	68%

Level of experience - local riders:

Novice rider	5%
Regular rider	26%
Experienced rider	69%

Level of experience – day and tourist visitors:

Novice rider	50%
Regular rider	24%
Experienced rider	26%

On riding holiday

Novice rider	49%
Regular rider	15%
Experienced rider	36%

Visitors reported being attracted to Wales primarily by the quality of the landscape, and the peace and quiet. Half of all riders mentioned the landscape and 27% indicated the peace and quiet as important factors attracting them to ride in an area. Local riders were more concerned with the 'quality of the trails'. One third of all riders and 42% of local riders stated there was somewhere they would like to ride but currently were not able to do so. Problems with farmers, poor maintenance of bridleways, obstructions and lack of connectedness of the bridleway network were all mentioned. For many visitors, the high quality of teaching available at riding centres was an important factor.

Some conflict with other users was reported. In mid-Wales and the Brecon Beacons area illegal motorcyclists and mountain bikers were mentioned as a problem and mountain bikers were mentioned also in North Wales. Motor vehicles (on and off-road) and cyclists were the main sources of conflict in all areas. Cyclists were a particular problem as they are silent and can 'spook' the horses. Over half the sample (58%) felt the number of horse riders in the area in which they were riding was 'about right'. Only 3.8% showed concern that there are too many riders all though concern seemed to be focused in the Brecon Beacon and South Wales areas. In mid-Wales 60% of the sample stated there were not enough riders.

'Waymarking', 'lack of other riders' or 'availability of services' were not thought to be important in terms of attracting people to ride in any of the areas.

Geocaching

Geocaching is essentially a treasure hunt using GPS (Global Positioning Device) to search and locate caches. Individuals and organizations set up caches all over the world and share the locations of these caches on the internet. GPS users can then use the location coordinates to find the caches. Once found, a cache may provide the visitor with a wide variety of rewards. All the visitor is asked to do is if they get something they should try to leave something for the cache. According to the Observer, there are more than 5,400 geocaches in the UK and more than 150,000 in 214 countries worldwide.

Trigpointing

Trigpointing is similar to geocaching in that it uses coordinate systems to locate a particular point. In this case the point is one of the 6,500 trig point pillars in the UK (these are the 4ft high pillars usually located on the top of hills and mountains). Users simply log the ones that have visited and enjoy a good walk and views whilst finding

them. In terms of participants there are 882 contributing users to http://www.trigpointinguk.com/.

Water sports

A recent study to examine participation in twelve different water sports funded by the RYA (RYA, 2003), reported the results of a 2002 survey of nearly 6,000 persons in England, Scotland and Wales. Some significant variations in numbers of participants from one year to another are attributed to fluctuations in the sampling procedures used.

Water sports participation in 2003

Activity	% of sample	estimated *minimum* no. of participants (million)	% of sample in Wales*
Any water sport	7.2	2.97	9.2
Canoeing	2.2	0.85	2.7
Water skiing	1.2	0.44	1.7
Other small sail boat activities (dinghies)	0.8	0.28	1.8
Rowing	1.1	0.4	0.8
Windsurfing	0.74	0.25	0.7
Using personal watercraft	1.o	0.37	0.9
General motor boating	0.9	0.32	0.6
Yacht cruising	0.7	0.24	2.2
Power boating	0.9	0.3	0.8
Small sail boat racing	0.8	0.26	0.6
Canal boating	0.6	0.2	0.4
Yacht racing	0.2	0.06	0.5
None	92.8	44.5	92.0

* Note: Wales includes the west and southwest ITV regions of England.

Average participation in most activities was between 2.6 and 7.6 days for the sample. The majority of persons participated less than five times per year in these activities. A significant proportion of water skiers (47%) and windsurfers (35%) only engaged in the activity abroad.

Demographic character of participation in water sports, 2003
(Source: RYA, 2003)

Characteristic	**Any watersport**	**Sail***	**power***	**manual***	**population (million)**
Gender					
Male	10.1	3.7	4.0	5.5	21.7
Female	4.5	1.8	1.9	2.3	22.8
Age					
16-34	12.8	4.2	5.6	8.1	14.1
35-54	7.1	2.7	2.6	3.3	15.0
55+	2.2	1.4	0.9	0.6	15.4

Socio-economic group					
AB	13.0	5.6	4.3	7.1	7.8
C1	9.5	3.3	4.4	5.2	13.1
C2DE	4.1	1.5	1.7	2.0	23.6
Life stage**					
Student/adults house share	17.8	7.3	7.6	12.4	4.6
Single	8.7	3.0	4.1	4.7	4.7
Couple under 55	10.7	2.9	4.9	5.8	4.1
Family	7.4	2.7	2.7	3.7	16.7
Single parents	2.6	1.0	0.7	1.3	1.7
Empty nesters	4.1	2.7	1.9	0.4	3.8
Greys	1.1	0.6	0.2	0.4	8.7
Total	**7.2**	**2.7**	**2.9**	**3.9**	**44.5**

*Note:
Sail – small sailboat racing, other sailboat activities, yacht racing, yacht cruising, windsurfing
Power – power boating, general motor boating, canal boating, using personal watercraft
Manual – canoeing, rowing and water skiing

** Note:
single parent – one adult with one or more children in household
family - a household of more than two with children
couple under 55 – two married or living as married under 55 and no children
empty nesters - two people aged 55-65 living in house with no children
greys – living alone over 64, or two or more over 64 living in house with no children

The RYA data suggest that males are almost twice as likely to participate in watersports as females, and the majority are aged 16-34. Participation drops steeply beyond the age of 34 yrs. Students, single persons, families, and couples under 55 are more likely to participate in water sports than the other life stage groups. Participation also declines as one moves from the higher to the lower socio-economic groups.

Canyoning

Canyoning involves climbing and then getting down waterfalls and mountain streams Using a combination of jumping, abseiling and natural water slides. Often it is undertaken as part of a holiday but is becoming a popular regular activity. Although it is a relatively new sport it is gaining in popularity.

Surfing

British surfing Association estimates that there are 500,000 regular surfers in the UK having grown massively in the last decade. According to the BSA (the sport's governing body), it's membership is up 400% to 10,000 in the last 5 years

The sport is focused in the South West of England and Wales. 12% of BSA approved surf schools are in Wales.

Fistral Beach Inn, Cornwall taught 8,000 people how to surf in 2005. Hire of boards and wet suits reported to have increased by 20% on previous year (Guardian, 17 July, 2006). People pay approximately £35 for a lesson, £5 to park and £5 for refreshments.

There are now 60 BAS approved Schools compared to 20 only five years ago. Much of increase form females taking up the sport. Approximately 100,000 female surfers in UK, up from 10,000 three years ago.

Pritchard, et al. (2004) note that although the number of female surfers has increased there are barriers to women in surfing. Barriers include:

- Competitions that favour male surfers
- Few companies offer sponsorship to women and the prize money is lower
- Lack of support and encouragement from men
- Support from men in the water often seen as patronising
- Women create a mental barrier for themselves due to the physical and sometimes dangerous nature of surfing
- Media coverage is important in promoting surfing – but women tend to be "objectified" in magazines.

There is some evidence that changes to women's lives at different ages limit the amount of surfing they can do:

- Pregnancy often prevents surfing (evidence of miscarriages from women who surfed while pregnant)
- Lack of time while raising children (especially if a single parent)
- Age makes physical challenge harder

Characteristics of a sample of surfers in Australia (n=430)
(Source: Dolnicar and Fluker, 2003)

Average age	30
Male	93%
Female	7%
Years surfing:	
< 2 yrs	11%
3 – 5yrs	17%
6 – 10	19%
11 – 15	21%
16 – 20	10%
>20 yrs	22%
Surfing ability:	
beginner	8%
intermediate	41%
advanced	46%
Travelling companions:	
Alone	14%
Partner	17%

Family	10%
one friend	19%
2 – 4 friends	26%
5 or more friends	7%

Kite Surfing

According to www.kitesurfing.org, the UK scene is now growing from a small group of about 12 kite surfers at the beginning of 1999 to approx 7,000 kitesurfers. The BKSA (British Kite Surfing Association) has just under 3000 members and believes that about half are regular. There are 20 registered schools and 20 clubs in the UK. It is apparently one of thre fastest growing watersports, albeit from a small base.

White Water Rafting

This is usually a once in a lifetime experience, undertaken as part of a holiday, but others do take part in the sport on a more regular basis.

Caving

National Caving Association (NCA) Forward Plan 1999 – 2002 estimates as many as 20,000 persons in the UK have some caving interests, of which 10,000 have some kind of affiliation or membership of bodies connected to the NCA. Mintel report that there is a decline in the number of cavers in the UK . Reasons include the outbreak of foot and mouth disease in 2001 which resulted in many cavers turning to other activities. The sport has a generally low profile with press only reporting when there is an accident.

Climbing

In 2005 the British Mountaineering Council had just over 64,000 members but it estimates that there are approximately 150,00 active climbers in the UK from BMC membership and climbing wall attendance statistics. There are difficulties in coming to precise numbers due to the definition of the sport and the number of climbers that are not affiliated to any clubs or associations. Types of climbing include, indoor climbing on climbing walls, rock climbing, scrambling, ice climbing and back country skiing.

There are over 400 indoor rock climbing walls in the UK

There are 231 recognised crags in the England which contain 13500 routes (http://www.rockfax.com/databases/)

There are 400 climbing clubs in the UK

In a survey of 102 climbers in the UK (at climbing centres in the Northwest and Midlands regions of England) overall population demographics revealed a cohort distribution of 73 (72%) male and 29 (28%) female, with a mean age of 29 (9.3) yr and 8.9 (8.2) yr of climbing experience at an approximate level of Fr 6c

Mountainboarding or All Terrain Boarding

According to the All Terrain Boarding Association, the sport can trace it's routes back to the 1970s and now attracts over 1 million participants worldwide with an estimated 6000+ participants in the UK. The sport is now starting to be used for cross marketing

with other products. Ford recently used the boards in their advertising about the Ford Edge and Nissan in the marketing for the X-Terra (www.atbauk.org).

Kite Flying

The Kite Society of Great Britain was founded in 1979. Kite flying publication has been in circulation for over 25 years. There appear to be 7 active forums on the different types of kite flying:

- Sport flying
- Trick flying
- General kite flying
- Power and traction kiting

Motorsport

There are nearly 800 registered motor clubs who organise almost 5,000 events in 22 different disciplines. Over 30,000 individuals hold MSA Competition licenses, but there are at least 100,000 competitors in total.

APPENDIX 3

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