Group 1: Non-Participants

Definition

Have not taken part in any informal outdoor recreation activities in the last 12 months.

6% of the population (140,000)

Geodemographic Profile

- Smallest segment in population terms
- Age is the most significant determinant of being a non-participant, especially over 75's
- Disability is also a significant determinant, when in conjunction with old age (ie over 75 **plus** a limiting long-standing illness / disability)
- Are also more likely to not have a car, to have no qualifications, and to be retired. However these three variables are most likely to be a result of the combination of old age and disability.
- The following demographic factors are **not** distinguishing attributes of this group: gender (men and women are equally likely to be non-participants) and ethnicity (could be due to small sub-sample size).
- Non-participation in NOT associated with living in a Community First area, nor is it associated with different levels of deprivation (based on the Welsh Indices of Multiple Deprivation – WIMD)

Barriers and Latent Demand

- Main barriers to current non-participation are Disability and Old Age
- Significantly less likely than average to say that 'too busy' or 'bad weather' are barriers
- One of the lowest levels of expressed demand for increased participation (latent demand)
- For those that did express some demand, the preferred activities were walking and outdoor swimming
- Stated barriers to increased participation were a combination of disability, health problems, and old age

Conclusions

The profile of this segment indicates that it represents a small proportion of the population who are subject to significant constraints to participation relating to the combination of old age and disability.

Although there is some latent demand for participation, it is likely (given that this group has not undertaken any outdoor activities in the previous 12 months) that this could be an expression of 'wishful thinking'.

This Group is in the 'Red Zone' as they gain limited physical activity related health benefits.

Table 1 – Significant differences between Group 1 and the population average

		Population Average	1) Non-participants
Gender	Male	48	44
	Female	52	56
Age	16-24	14	5
	25-34	16	2
	35-44	16	7
	45-54	18	7
	55-64	14	18
	65-74	9	12
	75-84	11	35
	85+	2	12
Highest educational qualification	Degree/Higher Education/equivalent	35	15
	A-levels, vocational level 3/equivalent	14	5
	GCSE/O-levels	21	13
	No qualifications	19	52
Working status	Working (full or part time)	58	23
	Retired	23	56
	Unemployed/Not working	10	17
	Other	9	4
Limiting illness/ disability	Yes	20	56
	No	80	44
Ethnicity	White	96	95
	BME	4	5
Car access	Yes	85	58
	No	15	42
Dog in household	Yes	34	17
	No	66	83
Children in household	Yes	23	6
	No	77	94
	Base:	**6,045**	**373**

Table 2 – Geographic profile by Activity Segment (most recent visit, column %)

		Population Average	1) Non-participants
Spatial Planning Area	**1** North West Wales	10	9
	2 North East Wales	17	14
	3 Central Wales	13	9
	4 Pembrokeshire	5	3
	5 Swansea Bay	19	22
	6 South East Wales	47	51
Urban or rural area	Urban	57	62
	Town/fringe	17	19
	Village/hamlet/isolated dwelling	20	13
Index of Multiple Deprivation	Top 10% (least deprivation)	7	6
	Mid 11% to 89%	83	81
	Bottom 10% (most deprivation)	10	12
Communities First	Yes	14	20
	No	86	80
	Base:	**6,045**	**373**

Key: Statistically significant variations from total are highlighted as follows: Above overall average Below overall average

Group 2: Rare Participants

Definition

Have visited the outdoors in the last 12 months, but have not done any informal recreation activities in the last 4 weeks.

8% of the population (188,000)

Geodemographic Profile

- Second smallest segment (together the 'non' and 'rare' participants only make up 14% of the population)
- Disability is the most significantly defining factor associated with the group, but less so than for the 'non-participants' group
- Age is split between the 'middle aged' (45 – 64) and the elderly (75+), with the proportion of elderly people being significantly higher than average.
- Half of this group will be working, but a higher than average proportion will be retired.
- As with the non-participants, this group is more likely than average to have no qualifications, and less likely to have a dog or a car.
- People in this group are significantly more likely to live in an urban area, and in South East Wales. However deprivation (Community First or WIMD) makes no difference.

Activities

- Overall, a lower than average level of participation in all activities
- But are closer to the average for more gentle / passive pursuits (such as walking, sightseeing and picnicking), than for more 'active' pursuits (such as cycling or climbing)

Barriers and Latent Demand

- Main barriers to current participation are: 'Bad Weather' and 'Lack of Time'.
- Less likely to say 'Disability' or 'Old Age'
- One of the highest levels of latent demand to do more activities of all the segments, especially for walking.
- Most commonly cited barrier to not participating more was 'Too Busy'. However, also higher than average for other barriers: 'Health' and 'Age', along with 'No Particular Reason'.

Conclusions

Overall, the profile of this group is similar to that of the 'non-participants', just to a lesser degree However, it appears to be a 'split' group, between the elderly / retired / disabled, and the 'working / 45-64 year olds'

The differences in their respective 'barriers' is one of the main distinguishing features between 'non' and 'rare' participants. These reflect the 'split' in this profile:

- some participants likely to be middle-aged, working full-time, and therefore having little available time, or have low motivation to participate in outdoor recreation
- some participants are likely to be elderly and disabled, and to not participate due to physical constraints.

This Group is in the 'Red Zone' as they gain limited physical activity related health benefits

Table 1 – Significant differences between Group 2 and the population average

		Population Average	2) Rare participants
Gender	Male	48	45
	Female	52	55
Age	16-24	14	7
	25-34	16	13
	35-44	16	8
	45-54	18	21
	55-64	14	16
	65-74	9	11
	75-84	11	20
	85+	2	3
Highest educational qualification	Degree/Higher Education/equivalent	35	24
	A-levels, vocational level 3/equivalent	14	12
	GCSE/O-levels	21	13
	No qualifications	19	35
Working status	Working (full or part time)	58	51
	Retired	23	36
	Unemployed/Not working	10	9
	Other	9	4
Limiting illness/ disability	Yes	20	36
	No	80	64
Ethnicity	White	96	96
	BME	4	4
Car access	Yes	85	79
	No	15	21
Dog in household	Yes	34	25
	No	66	75
Children in household	Yes	23	20
	No	77	80
	Base:	**6,045**	**493**

Table 2 – Geographic profile by Activity Segment (most recent visit, column %)

		Population Average	2) Rare participants
Spatial Planning Area	**1** North West Wales	10	8
	2 North East Wales	17	14
	3 Central Wales	13	11
	4 Pembrokeshire	5	5
	5 Swansea Bay	19	22
	6 South East Wales	47	54
Urban or rural area	Urban	57	63
	Town/fringe	17	16
	Village/hamlet/isolated dwelling	20	16
Index of Multiple Deprivation	Top 10% (least deprivation)	7	6
	Mid 11% to 89%	83	85
	Bottom 10% (most deprivation)	10	9
Communities First	Yes	14	16
	No	86	84
	Base:	**6,045**	**493**

Key: Statistically significant variations from total are highlighted as follows: Above overall average Below overall average

Group 3: Infrequent, Low Intensity Participants

Definition

Undertake fewer than 5 recreational visits to the outdoors per week, and a typical activity is 'low intensity' (ie at an insufficient level for any physical health benefits)

21% of the population (494,000)

Geodemographic Profile

- One of the largest segments, making up one fifth of the population
- People in this group are more likely to be women and to have children.
- They are also more likely than average to be in the top 10% of the WIMD
- There are less likely to have a dog
- There is **no** association with age or education, nor with any differences in car ownership.
- As with most of the segments, geography (where you live) has little impact, with no significant differences between residents in rural or urban areas, nor with Community First areas.

Activities, Places and Motivations

- Participants in this group are the most likely to visit playgrounds
- They are also more likely than average to take part in more gentle / passive pursuits, such as sightseeing and wildlife watching.
- Although most participants go walking, this is lower than average.
- This is the group which is most likely to visit local parks, and is also more likely than average to go to the beach.
- This group is the most likely to be motivated by the need to 'Entertain Children', along with a desire for 'fresh air'.
- They are the least likely segment to be motivated by 'health and exercise'.

Barriers and Latent Demand

- Has slightly higher than average levels of latent demand, especially for walking.
- This group is fits the 'average' for all barriers, with 'Lack of Time' given as the main reason for not participating more.

Conclusions

This group reflects a segment of the population which is more likely to be women with children. Their choice of activities and places to visit, along with their motivations, reflects the need to incorporate outdoor recreation with entertaining children.

This Group is in the 'Amber Zone' as the gain some physical activity related health benefits, but this is below the minimum required level.

Table 1 – Significant differences between Group 3 and the population average

		Population Average	3) Infrequent, low intensity
Gender	Male	48	42
	Female	52	58
Age	16-24	14	14
	25-34	16	17
	35-44	16	18
	45-54	18	18
	55-64	14	14
	65-74	9	7
	75-84	11	9
	85+	2	1
Highest educational qualification	Degree/Higher Education/equivalent	35	34
	A-levels, vocational level 3/equivalent	14	18
	GCSE/O-levels	21	21
	No qualifications	19	18
Working status	Working (full or part time)	58	59
	Retired	23	21
	Unemployed/Not working	10	7
	Other	9	13
Limiting illness/ disability	Yes	20	17
	No	80	83
Ethnicity	White	96	95
	BME	4	5
Car access	Yes	85	84
	No	15	16
Dog in household	Yes	34	26
	No	66	74
Children in household	Yes	23	28
	No	77	72
	Base:	**6,045**	**1,281**

Table 2 – Geographic profile by Activity Segment (most recent visit, column %)

		Population Average	3) Infrequent, low intensity
Spatial Planning Area	**1** North West Wales	10	10
	2 North East Wales	17	19
	3 Central Wales	13	10
	4 Pembrokeshire	5	5
	5 Swansea Bay	19	19
	6 South East Wales	47	48
Urban or rural area	Urban	57	58
	Town/fringe	17	17
	Village/hamlet/isolated dwelling	20	20
Index of Multiple Deprivation	Top 10% (least deprivation)	7	12
	Mid 11% to 89%	83	79
	Bottom 10% (most deprivation)	10	9
Communities First	Yes	14	16
	No	86	84
	Base:	**6,045**	**1,281**

Key: Statistically significant variations from total are highlighted as follows: Above overall average Below overall average

Group 4: Frequent, Low Intensity Participants

Definition

Take an average of 5 or more recreational visits to the outdoors per week, but a typical activity is 'low intensity' (ie at an insufficient level for any physical health benefits)

9% of the population (212,000)

Geodemographic Profile

- The defining factors affecting this group are to be a dog owner, and no have no children.
- They are also more likely than average to live in a rural area, and to be a resident of Central Wales
- Participants in this group are negatively associated with deprivation, ie they are significantly less likely to be in a Community First area or in the Bottom 10% WIMD.
- This group has the most varied age range, and has NO differences associated with gender, ethnicity or car ownership

Activities, Places and Motivations

- Participants in this group have the highest level of participation in walking
- The 'Local Park' is the most visited place, but this group has a higher than average level of visits to 'Farmland'.
- This group is the least likely to visit 'Woodlands' or 'Moorland'
- This group is much more likely than average to be motivated by 'Exercise your dog', along with for 'Health and Exercise'.

Barriers and Latent Demand

- One of the lowest levels of Latent demand, and although the most frequently stated activity was 'more walking', this is significantly lower than average.
- Although the main barrier to increased participation stated by this group is 'Lack of Time', this is significantly lower than average. However, 'No Particular Reason' is stated more often than any other segment.

Conclusions

This group comprises of a significant proportion of dog owners, who do not have children, and make use of their local places (be that a park or farmland). It would appear that these two attributes are the main distinguishers between Group 3 (Infrequent, Low Intensity) and Group 4 (Frequent, Low Intensity), and are therefore likely to be a significant determinant of frequency of participation in outdoor recreation.

Given that this group already visits the outdoors more than 5 times a week, it is unlikely that they would want to increase their levels of participation, but there would be an opportunity to increase the intensity of their activity in order to improve their derived health benefits.

This Group is in the 'Amber Zone' as the gain some physical activity related health benefits, but this is below the minimum required level.

Table 1 – Significant differences between Group 4 and the population average

		Population Average	4) Frequent, low intensity
Gender	Male	48	48
	Female	52	52
Age	16-24	14	18
	25-34	16	11
	35-44	16	12
	45-54	18	20
	55-64	14	13
	65-74	9	9
	75-84	11	14
	85+	2	1
Highest educational qualification	Degree/Higher Education/equivalent	35	38
	A-levels, vocational level 3/equivalent	14	12
	GCSE/O-levels	21	24
	No qualifications	19	16
Working status	Working (full or part time)	58	51
	Retired	23	27
	Unemployed/Not working	10	9
	Other	9	13
Limiting illness/ disability	Yes	20	15
	No	80	85
Ethnicity	White	96	95
	BME	4	5
Car access	Yes	85	82
	No	15	18
Dog in household	Yes	34	53
	No	66	47
Children in household	Yes	23	18
	No	77	82
	Base:	**6,045**	**556**

Table 2 – Geographic profile by Activity Segment (most recent visit, column %)

		Population Average	4) Frequent, low intensity
Spatial Planning Area	**1** North West Wales	10	11
	2 North East Wales	17	12
	3 Central Wales	13	18
	4 Pembrokeshire	5	6
	5 Swansea Bay	19	15
	6 South East Wales	47	51
Urban or rural area	Urban	57	53
	Town/fringe	17	16
	Village/hamlet/isolated dwelling	20	24
Index of Multiple Deprivation	Top 10% (least deprivation)	7	8
	Mid 11% to 89%	83	86
	Bottom 10% (most deprivation)	10	5
Communities First	Yes	14	11
	No	86	89
	Base:	**6,045**	**556**

Key: Statistically significant variations from total are highlighted as follows: Above overall average Below overall average

Group 5: High Intensity, Infrequent, Less than 150 min Participants

Definition

Activities are undertaken at a moderate to high level of intensity, but are only done less than 5 times a week, and / or for less than 150 minutes.

26% of the population (612,000)

Geodemographic Profile

- This is the largest of all the segments, with over a quarter of the population falling within this group.
- This group is most significantly defined by young to middle age groups (25 – 44)
- They are also more likely to have a degree and be working, along with being in the Top 10% WIMD
- Participants are also much less likely to be a dog owner, and much more likely to have a car
- This group has **no** differences associated with gender, ethnicity or having children. Nor does 'geography' have much affect, with no differences between people living in rural or urban locations, nor in Community First areas.

Activities, Places and Motivations

- This group is the most likely to participate in the more 'active' pursuits of running and road cycling.
- Participants in this group are less likely than average to participate in walking.
- Proximity seems to be important, with higher than average levels of visits to Local Parks and Roadside Tracks.
- This group is most likely to be motivated by 'Health and Exercise'.

Barriers and Latent Demand

- There is a higher than average level of Latent Demand, with above average preferences for more Walking, Road Cycling and Mountain Biking
- This group has more than likely to cite being 'Too Busy' and 'Bad Weather' as their main reasons for not increasing participation.

Conclusions

This group comprises predominantly of younger adults who undertake active pursuits. They are affluent and educated, but have a lack of spare time, which negatively impacts on the frequency of their participation. They also prefer to undertake their activities locally.

Increasing intensity is not needed for this group, however improving their frequency or duration of participation would enable them to maximise the potential health benefits from outdoor recreation.

This Group is in the 'Amber Zone' as the gain some physical activity related health benefits, but this is below the minimum required level.

Table 1 – Significant differences between Group 5 and the population average

		Population Average	5) High intensity but infrequent and under 150 minutes
Gender	Male	48	47
	Female	52	53
Age	16-24	14	15
	25-34	16	18
	35-44	16	18
	45-54	18	18
	55-64	14	13
	65-74	9	7
	75-84	11	7
	85+	2	1
Highest educational qualification	Degree/Higher Education/equivalent	35	38
	A-levels, vocational level 3/equivalent	14	16
	GCSE/O-levels	21	23
	No qualifications	19	15
Working status	Working (full or part time)	58	65
	Retired	23	19
	Unemployed/Not working	10	7
	Other	9	9
Limiting illness/ disability	Yes	20	17
	No	80	83
Ethnicity	White	96	95
	BME	4	5
Car access	Yes	85	90
	No	15	10
Dog in household	Yes	34	29
	No	66	71
Children in household	Yes	23	23
	No	77	77
	Base:	**6,045**	**1,583**

Table 2 – Geographic profile by Activity Segment (most recent visit, column %)

		Population Average	5) High intensity but infrequent and under 150 minutes
Spatial Planning Area	**1** North West Wales	10	9
	2 North East Wales	17	16
	3 Central Wales	13	11
	4 Pembrokeshire	5	5
	5 Swansea Bay	19	21
	6 South East Wales	47	48
Urban or rural area	Urban	57	59
	Town/fringe	17	17
	Village/hamlet/isolated dwelling	20	18
Index of Multiple Deprivation	Top 10% (least deprivation)	7	9
	Mid 11% to 89%	83	85
	Bottom 10% (most deprivation)	10	6
Communities First	Yes	14	13
	No	86	87
	Base:	**6,045**	**1,583**

Key: Statistically significant variations from total are highlighted as follows: Above overall average Below overall average

Group 6: High Intensity, Infrequent, Over 150 min Participants

Definition

Activities are undertaken at a moderate to high level of intensity, and are done for more than 150 minutes (but less than 5 times a week)

12% of the population (282,000)

Geodemographic Profile

- This group is the only one which is significantly associated with men, especially between the ages of 35 - 54.
- It has the highest proportion of participants who are working, and who also have a degree.
- They are also more likely to be in the Top 10% WIMD, and to be white, have a car and children.
- Participants are also much less likely to be a dog owner, and much more likely to have a car
- This group is the least likely to be associated with where people live, with **no** differences between rural and urban locations, nor Community First areas.

Activities, Places and Motivations

- This group is the most likely to participate in 'sightseeing' along with the more 'active' pursuits of 'informal games' and 'mountain biking'.
- Participants in this group are less likely than average to participate in walking (although this is still the most commonly undertaken activity).
- This group is the most likely to visit 'Mountains and Moorland', along with 'Woodlands' and the 'Coast'.
- They are significantly less likely to visit 'Local Parks'
- This group is most likely to be motivated by 'Participating in my Hobby', along with 'Enjoying the Scenery'. They are significantly less likely to be motivated by 'Health and Exercise'.

Barriers and Latent Demand

- This group has the highest level of Latent Demand, with significantly higher levels of demand for more Walking, Mountain Biking, and Watersports.
- Although 'Too Busy' is the most cited barrier to increased participation, this group is significantly more likely to mention 'Bad Weather'and 'Lack of Suitable Places to Go'.

Conclusions

This group is predominantly male, highly educated, and works full time. The increased duration of their visits (150 min's plus), along with reduced frequency, means they are most likely to take part in 'days out'. This is reflected in their choice of activities, such as sightseeing, and the places that they visit (mountains, coast etc).

This Group is in the 'Green Zone' as they meet or exceed the required level of physical activity needed to deliver health benefits.

Table 1 – Significant differences between Group 6 and the population average

		Population Average	6) Infrequent but high intensity and over 150 minutes
Gender	Male	48	60
	Female	52	40
Age	16-24	14	13
	25-34	16	17
	35-44	16	21
	45-54	18	24
	55-64	14	12
	65-74	9	8
	75-84	11	4
	85+	2	1
Highest educational qualification	Degree/Higher Education/equivalent	35	42
	A-levels, vocational level 3/equivalent	14	15
	GCSE/O-levels	21	17
	No qualifications	19	14
Working status	Working (full or part time)	58	68
	Retired	23	14
	Unemployed/Not working	10	8
	Other	9	10
Limiting illness/ disability	Yes	20	11
	No	80	89
Ethnicity	White	96	98
	BME	4	2
Car access	Yes	85	91
	No	15	9
Dog in household	Yes	34	23
	No	66	77
Children in household	Yes	23	29
	No	77	71
	Base:	**6,045**	**718**

Table 2 – Geographic profile by Activity Segment (most recent visit, column %)

		Population Average	6) Infrequent but high intensity and over 150 minutes
Spatial Planning Area	**1** North West Wales	10	12
	2 North East Wales	17	19
	3 Central Wales	13	14
	4 Pembrokeshire	5	5
	5 Swansea Bay	19	19
	6 South East Wales	47	45
Urban or rural area	Urban	57	56
	Town/fringe	17	20
	Village/hamlet/isolated dwelling	20	20
Index of Multiple Deprivation	Top 10% (least deprivation)	7	12
	Mid 11% to 89%	83	82
	Bottom 10% (most deprivation)	10	5
Communities First	Yes	14	13
	No	86	87
	Base:	**6,045**	**718**

Key: Statistically significant variations from total are highlighted as follows: Above overall average Below overall average

Group 7: High Intensity, Frequent Participants

Definition

Activities are undertaken at a moderate to high level of intensity, and are done 5 or more times a week.

17% of the population (400,000)

Geodemographic Profile

- This group is most significantly associated with owning a dog, and living in a rural area and / or in Central Wales or Pembrokeshire.
- It has a higher than average proportion of people in the youngest age group (16 – 24), but also in the 65 – 74 age range.
- They are also more likely to be in the Top 10% WIMD, to be white, and to not have a disability.
- There are no significant differences associated with gender, car ownership, having children, or living in a Community First area.

Activities, Places and Motivations

- This group has a significantly higher than average level of participation in 'walking', along with the more 'active' pursuits of 'running', 'road cycling', 'mountain biking', and 'horse riding'.
- This group is the most likely to visit 'Woodlands', and significantly more likely than average to visit 'Mountains and Moorland' and the 'Farmland'.
- They are significantly less likely to visit 'Local Parks'
- This group is most likely to be motivated by 'Health and Exercise', along with 'Exercising my Dog' and 'Participating in my Hobby'.

Barriers and Latent Demand

- This group has the lowest level of Latent Demand, and are therefore significantly less likely to want to do more 'walking'.
- 'Too Busy' is the most cited barrier to increased participation.

Conclusions

This group is the most active of all the segments, and as with the other groups with high levels of frequent participation, is strongly associated with owning a dog. It is also the group which is most likely to live in a rural area, and to take part in a wide range of active pursuits.

Although it has the lowest level of latent demand, this is unsurprising given that this group has the highest level of current participation.

This Group is in the 'Green Zone' as they meet or exceed the required level of physical activity needed to deliver health benefits.

Table 1 – Significant differences between Group 7 and the population average

		Population Average	7) Frequent and high intensity
Gender	Male	48	48
	Female	52	52
Age	16-24	14	16
	25-34	16	18
	35-44	16	15
	45-54	18	17
	55-64	14	15
	65-74	9	11
	75-84	11	5
	85+	2	1
Highest educational qualification	Degree/Higher Education/equivalent	35	36
	A-levels, vocational level 3/equivalent	14	13
	GCSE/O-levels	21	25
	No qualifications	19	16
Working status	Working (full or part time)	58	56
	Retired	23	20
	Unemployed/Not working	10	13
	Other	9	11
Limiting illness/ disability	Yes	20	15
	No	80	85
Ethnicity	White	96	98
	BME	4	2
Car access	Yes	85	87
	No	15	13
Dog in household	Yes	34	57
	No	66	43
Children in household	Yes	23	24
	No	77	76
	Base:	**6,045**	**1,040**

Table 2 – Geographic profile by Activity Segment (most recent visit, column %)

		Population Average	7) Frequent and high intensity
Spatial Planning Area	**1** North West Wales	10	12
	2 North East Wales	17	18
	3 Central Wales	13	17
	4 Pembrokeshire	5	7
	5 Swansea Bay	19	16
	6 South East Wales	47	43
Urban or rural area	Urban	57	52
	Town/fringe	17	16
	Village/hamlet/isolated dwelling	20	26
Index of Multiple Deprivation	Top 10% (least deprivation)	7	10
	Mid 11% to 89%	83	86
	Bottom 10% (most deprivation)	10	4
Communities First	Yes	14	15
	No	86	85
	Base:	**6,045**	**1,040**

Key: Statistically significant variations from total are highlighted as follows: Above overall average Below overall average