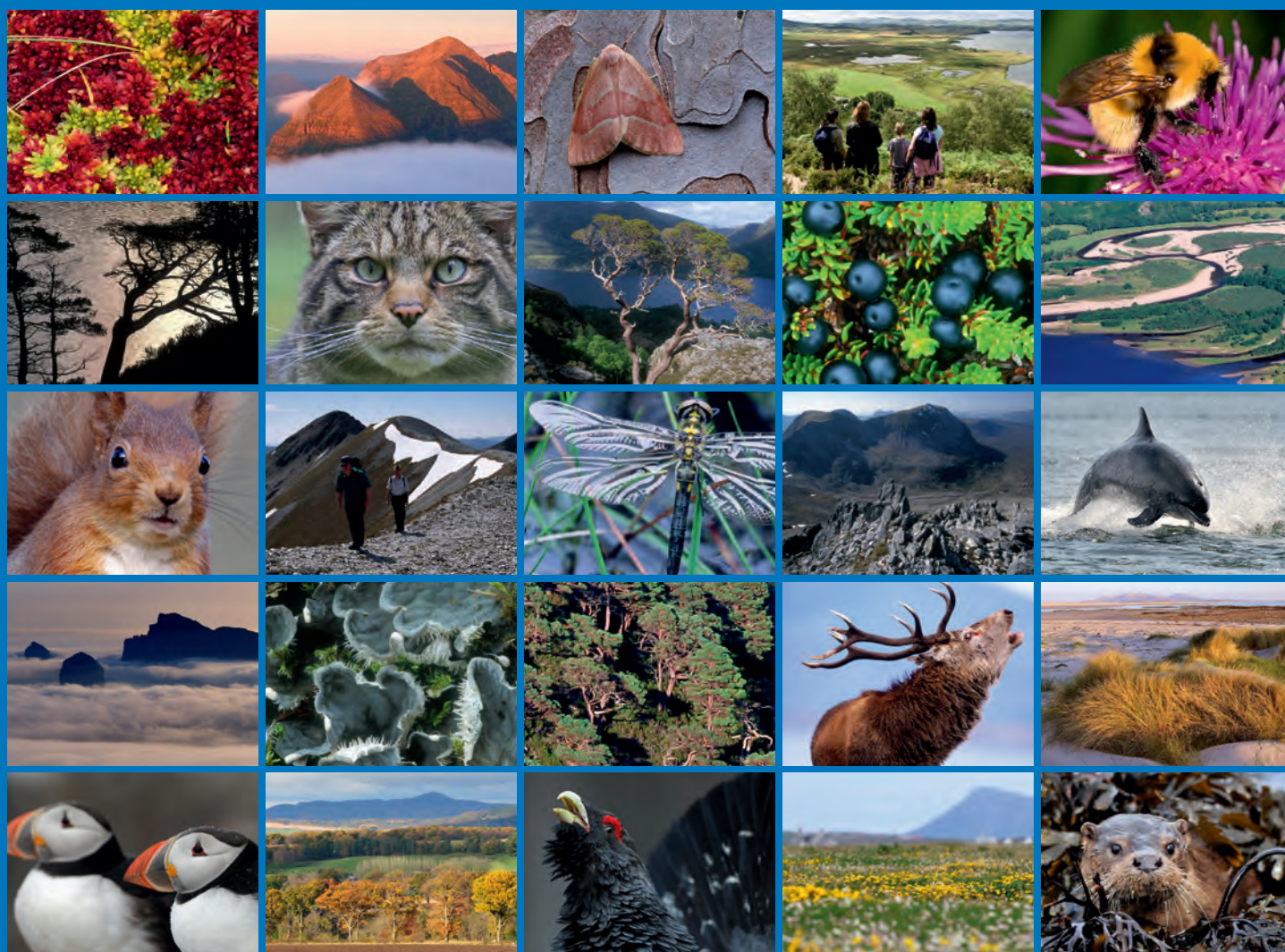


Scottish Recreation Survey: Annual summary report 2012





Scottish Natural Heritage
Dualchas Nàdair na h-Alba

All of nature for all of Scotland
Nàdar air fad airson Alba air fad

COMMISSIONED REPORT

Commissioned Report No. 604

Scottish Recreation Survey: Annual summary report 2012

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COMMISSIONED REPORT

Summary

Scottish Recreation Survey: Annual summary report 2012

Commissioned Report No.:604

Project no: 926

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Background

Scottish Natural Heritage (SNH) measures levels of participation in walking and other outdoor recreational activities each year to support the achievement of Scottish Government policy. A set of questions forming the Scottish Recreation Survey has been inserted into the Scottish Opinion Survey – a monthly Computer Assisted Personal Interview (CAPI) omnibus survey – since July 2003. This methodology ensures that a representative sample of the Scottish adult population (aged 16 and over) is interviewed each month.

Areas investigated in the survey include general trends in the number, frequency and location of visits to the outdoors, participation in a range of activities (walking, cycling, horse riding etc.), transport used and distances travelled on visits, party composition (including the number of trips taken with dogs), expenditure on visits, awareness and understanding of the Scottish Outdoor Access Code (the Code) and access to the countryside, including responsible behaviour and problems encountered. Some of the questions were asked monthly, others every second, third or sixth month.

Main findings

- In 2012, 79% of adults claimed to have made at least one visit to the outdoors for leisure or recreation in the previous twelve months, taking an estimated 297 million visits (lower than the 2011 estimate of 361 million). The total value of expenditure during these visits was estimated at around £2.6 billion. Forty two percent of adults visited the outdoors at least once a week during this period. This represents a decrease on the 2011 figure of 46% and is the lowest figure recorded since 2006. Over the longer term (2006 – 2012), however, there has been no statistically significant change in the proportion of adults visiting the outdoors at least once a week.
- The trend for visits being made closer to home remains evident in 2012. Linked to this, the percentage of visits taken on foot has increased from 50% in 2004 to 64% in 2012, while the percentage of visits where the main type of transport used to get to and from the main destination is a car has fallen from 43% to 30% over the same period of time.
- Around two-fifths of respondents were aware of the Scottish Outdoor Access Code (39%). The proportion 'definitely' aware of the Code in 2012 (at 25%) is lower than in any survey year between 2006 and 2011 (range 33% - 44%).

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1. INTRODUCTION

Scottish Natural Heritage (SNH) measures levels of participation in walking and other outdoor recreation activities each year to support the achievement of Scottish Government policy. The Scottish Recreation Survey (ScRS), piloted in 2002 and which commenced in July 2003, is the established vehicle for gathering this information. It is commissioned by SNH with support from its survey partner, Forestry Commission Scotland (FCS).

As a key to informing the development of policies to ensure that people can access the outdoors, SNH carries out regular monitoring of the ways in which people take part in informal outdoor recreation, such as walking, cycling and horse riding. Additionally, SNH has a duty under the Land Reform (Scotland) Act 2003 to monitor awareness of the Scottish Outdoor Access Code (the Code), including levels of responsible behaviour.

This report presents the results of the final year of the Scottish Recreation Survey, covering the period January to December 2012 inclusive.

1.1 Definitions

Throughout this report, the term 'outdoors' is used to include mountains, moorland, farmland (enclosed and unenclosed), forests, woods, rivers, lochs and reservoirs, beaches and the coast, and open spaces in towns and cities. 'Outdoor recreation' or 'recreation' is taken to be any non-motorised activity carried out for leisure purposes and includes activities granted a statutory right of access under Part 1 of the Land Reform (Scotland) Act 2003 (e.g. walking, cycling and picnicking).

1.2 Objectives

The overall aim of the ScRS is to provide continuous monitoring of participation in outdoor recreation in Scotland. The specific objectives of the ScRS include the following:

- To measure and collect details about the Scottish adult population's (aged 16 years and over) participation in outdoor recreation;
- To provide a picture of the types of location that recreational users visit – including countryside, inland water and coastal locations as well as urban sites, e.g. woodlands in towns and cities;
- To report on other issues, such as social and economic links with recreational use of the outdoors, e.g. expenditure, transport, party composition and social grade of users;
- To act as one of the monitors of awareness of the Scottish Outdoor Access Code, including levels of responsible behaviour.

This Annual Report covers 2012, the ninth and final full calendar year of the study, and includes comparisons with the results obtained each year from 2004 to 2011.¹ The 2005 annual summary report was the first to be prepared on a calendar year basis with the previous two reports published covering the periods July 2003 to June 2004 and July 2004 to June 2005, respectively. All of these reports are available on the Commissioned Reports page of the SNH website at:

<http://www.snh.gov.uk/publications-data-and-research/publications/search-the-catalogue/?q=scottish+recreation+survey&cat=REP%2CCR>

¹ Results regarding levels of participation in outdoor recreation and the total volume and value of visits to the outdoors cannot be compared with years before 2006 due to a change to the questionnaire content made in September 2005 (see Annex 4).

Throughout the report, where appropriate and significant, results for sub-groups of the adult population in Scotland are presented (e.g. by age group, social grade, working status). Data for these groups are included in the tabulations provided to SNH and come from demographic and other data collected in the interview and respondent profiling. Annex 1 provides the social grade definitions used, Annex 3 contains the full questionnaire (including demographic questions) and Annex 6 contains details of other analysis crossbreaks based on profiling respondent postcodes.

2. METHODOLOGY

A set of questions comprising the Scottish Recreation Survey is inserted each month in TNS's consumer omnibus survey, the Scottish Opinion Survey. Interviews are conducted in-home using CAPI (Computer Assisted Personal Interviewing) with a representative sample of Scotland's adult population (aged 16 years and over). Until June 2009, interviews were undertaken in 42 sampling points each month throughout the country with an average of 24 interviews undertaken within each point. However, from July 2009, the number of sampling points per month increased to 55, with a corresponding decrease in average interviews per sampling point to 18. Within each sample point, quota targets continued to be set to ensure representative coverage of the adult population on the basis of gender, age-group, social grade and working status.

A benefit of this reduced number of interviews per point is a less clustered sample and therefore reduced sampling variations. The principles followed in the selection of each month's sample points remained the same to ensure that data collected before and after this change to the sampling approach were comparable.

At the analysis stage, the survey data are weighted to ensure that the sample profile matches that of the Scottish adult population. Around 1,000 adults are interviewed each month as part of this survey. As a result, across the twelve months of data collection undertaken, a total of 12,119 respondents were interviewed in 2012.

The Scottish Recreation Survey questions, agreed with SNH and FCS staff, are classified into different categories. A core set of questions is asked every month while other questions are included every second, third or sixth month. Please refer to Annex 2 for information on the scheduling of each question and Annex 3 for copies of all of the questions used in the survey.

Data are presented to SNH and FCS in an Excel Viewer format each month. This provides an overview of the results for a cumulative 12 month period and allows the user to undertake fairly detailed analysis of the results. Data tabulations are also produced for each monthly survey and these are available from SNH in WinYaps and PDF format. The Nominated Officer (named on the front of this report) should be contacted for further information, or visit the Measuring Participation page of the SNH website at <http://www.snh.gov.uk/land-and-sea/managing-recreation-and-access/increasing-participation/measuring-participation/>.

3. SUMMARY OF MAIN FINDINGS

In this section of the report, the main findings to emerge from the analysis of the survey data are presented under a series of headings. These data are available in an Excel Viewer format on the Scottish Natural Heritage website.

Both in this report and the full data tabulations, the survey findings are normally presented as a percentage figure. These are subject to some degree of sampling error due to the fact that they are based on a sample of the Scottish adult population, as opposed to the entire Scottish adult population. The level of accuracy is primarily dependent on the size of the sample and the method of weighting used in the analysis of a particular result. The following guidance on the two different confidence levels is appropriate to consider when examining the survey findings.

a) Demographic weighting

For results regarding percentages of the population taking outdoor recreation visits and reasons for not taking visits (sections 3.2 to 3.6) and results regarding awareness and understanding of the Scottish Outdoor Access Code and associated legislation (section 3.14), the following should be noted:

- Where the sample size is in excess of 10,000 respondents, the data will generally be accurate to around $\pm 1\%$ at the 95% confidence level;
- When comparing two samples in excess of 10,000 respondents, differences of $\pm 2\%$ or more are statistically significant at the 95% confidence level;
- When the sample size is around 3,000 respondents, the data will generally be accurate to around $\pm 3\%$ at the 95% confidence level;
- When comparing two samples of around 3,000 respondents, (e.g. quarterly results from questions asked of the whole sample) differences of $\pm 4\%$ or more are statistically significant at the 95% confidence level;
- Where the sample size is around 1,000, the data will generally be accurate to around $\pm 5\%$ at the 95% confidence level;
- Where the sample size is around 500, the data will generally be accurate to around $\pm 7\%$ at the 95% confidence level.

b) Demographic and visit weighting

For results regarding the characteristics of outdoor recreation visits (sections 3.7 to 3.13 and 3.15), the following should be noted:

- Where the sample size is around 6,000 respondents, the data will generally be accurate to around $\pm 3\%$ at the 95% confidence level;
- When comparing two samples of around 6,000 respondents, differences of $\pm 4\%$ or more are statistically significant at the 95% confidence level;
- When the sample size is around 3,000 respondents, the data will generally be accurate to around $\pm 4\%$ at the 95% confidence level;
- When comparing two samples of around 3,000 respondents, differences of $\pm 6\%$ or more are statistically significant at the 95% confidence level;

- Where the sample size is around 2,000 respondents, the data will generally be accurate to around +/-5% at the 95% confidence level;
- Where the sample size is around 1,000, the data will generally be accurate to around +/-8% at the 95% confidence level;
- Where the sample size is around 500, the data will generally be accurate to around +/-11% at the 95% confidence level;
- Where the sample size is around 250, the data will generally be accurate to around +/- 15% at the 95% confidence level.

Note: where tables or bulleted lists are presented with figures reflecting monthly or quarterly periods, the data presented relate to responses received in the named survey waves, and do not directly correspond to information about each calendar month (e.g. the July 12 survey wave would, with a 4-week recall period, report on information for the last week of June and first three weeks of July 2012).

3.1 Survey themes

As 2012 represents the ninth full and final calendar year of the Scottish Recreation Survey, this report presents an opportunity to consider trends and themes that have emerged from the survey data over the years. This section discusses the following key themes:

- Overall visit behaviour
- Barriers to visiting
- Influence of affluence on visits
- Increase in shorter, local visits
- Increase in urban visits
- Dominance of walking
- Decreasing awareness of the Scottish Outdoor Access Code

3.1.1 Overall visit behaviour

Since 2006,² the proportion of the adult population living in Scotland visiting the outdoors at least once a year has been fairly consistent, as shown in Figure 1 below. The highest proportions taking visits were recorded in 2010 and 2011 (83% in each year).

² Results regarding levels of participation in outdoor recreation and the total volume and value of visits to the outdoors cannot be compared with years prior to 2006 due to a change in the questionnaire content made in September 2005 (see Annex 4).

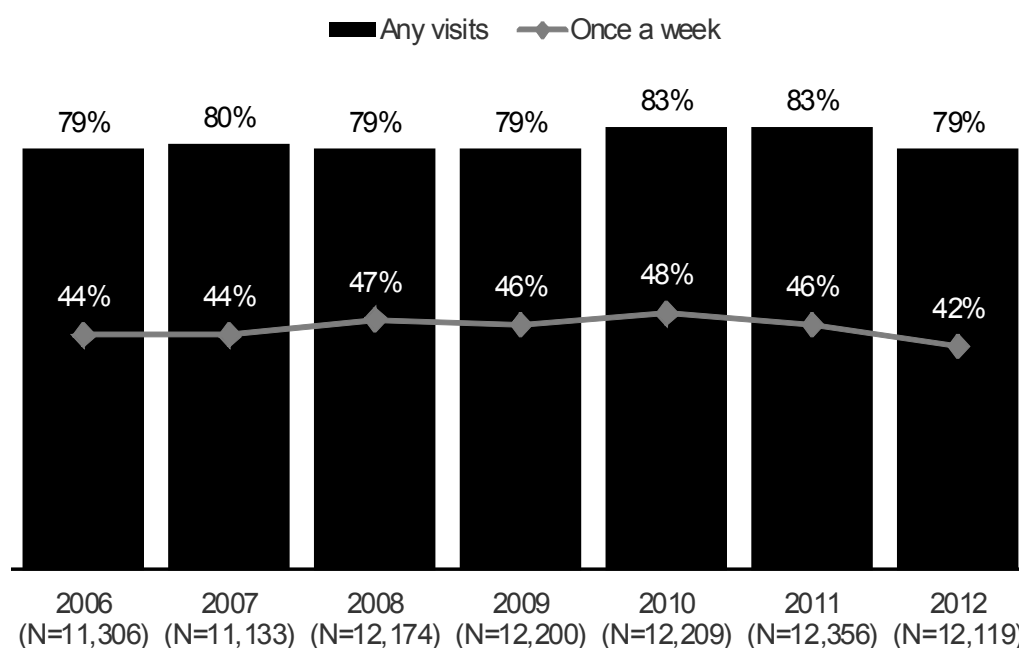


Figure 1. Visits taken in last 12 months 2006 – 2012
Base: All respondents

Figure 1 also shows the proportions of the population who indicated that they normally visit the outdoors at least once a week. While following a similar pattern to the trend for taking any visits, weekly visit taking has been slightly more variable over the years, with a year on year decrease each year between 2010 and 2012. In spite of this, there has been no statistically significant change in the proportion of adults visiting weekly across the time series as a whole.

Over the years, a number of demographic characteristics have been shown to correlate with propensity to visit the outdoors. Most significantly, respondents in the more affluent social grades are more likely to visit the outdoors, particularly those in the AB social grades. Likewise, over the years, the propensity to visit the outdoors has been consistently higher amongst those under the age of 55, those with children in their household, those in paid employment and those with access to a car.

Despite a decrease in the most recent survey year (see section 3.3 for more detail), the proportion of the population taking at least one visit to the outdoors in the four weeks prior to interview has remained relatively stable over the years (ranging from 52% to 59%). The average number of visits taken in the four weeks prior to interview has also followed a similar pattern, showing a good degree of stability but with the 2012 average the lowest recorded since 2006.

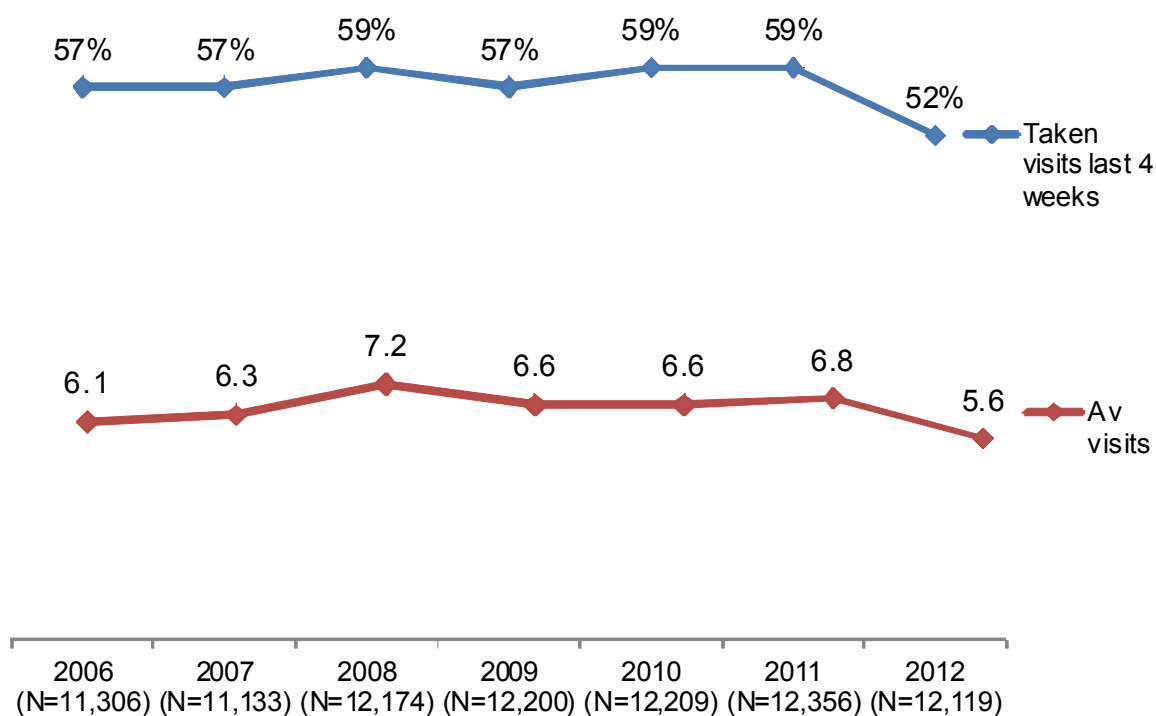


Figure 2. Visits taken in the four weeks prior to interview (2006 – 2012)
Base: All respondents

As shown in Figure 3, the estimated volume of visits taken each year has ranged from 297 million to 384 million, although margins of error should be taken into account.³ The 2012 estimate of 297 million visits is the lowest recorded since 2006.

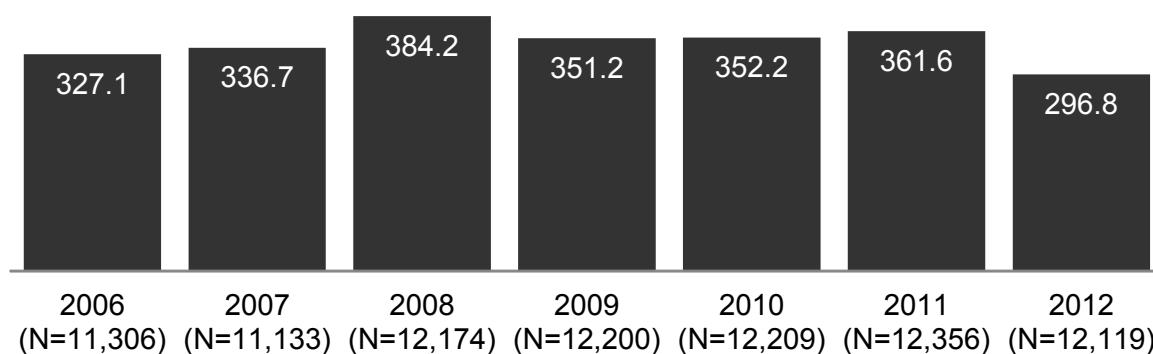


Figure 3. Annual volume estimates and visits taken in last 4 weeks⁴ (2006 – 2012)
Base: All respondents

³ Taking account of margins of error, at the 95% confidence level estimated total visits range from 277 to 317 million in 2012, 351 to 372 million in 2011, 342 to 363 million in 2010, 341 to 362 million in 2009, 373 to 398 million in 2008, 327 to 347 million in 2007 and from 317 to 337 million in 2006.

⁴ Please note that the 2011 estimates have been revised and differ from those published in previous reports.

3.1.2 Barriers to visiting the outdoors

Between 2005 and 2012 poor health and lack of time remained the main barriers to participation in outdoor recreation among those who never visit the outdoors. Poor health increased in prominence as a barrier between 2005 (mentioned by 27%) and 2011 (mentioned by 35%) before decreasing in 2012. The proportion of people citing lack of time as a barrier has, however, fallen between 2005 and 2012 (from 31% to 23%). Twice as many people mentioned bad weather as a deterrent in 2012 (8%) compared to 2005 (4%).

Table 1. Reasons for not visiting outdoors in last 12 months (2005-2012)

Base: All respondents

| | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % |
| Poor health | 27 | 33 | 28 | 31 | 31 | 36 | 35 | 29 |
| Lack of time/ too busy | 31 | 30 | 32 | 29 | 31 | 28 | 24 | 23 |
| No particular reason | 18 | 13 | 14 | 14 | 14 | 13 | 16 | 21 |
| Old age | 14 | 14 | 16 | 13 | 17 | 17 | 16 | 11 |
| Bad weather | 4 | 6 | 5 | 7 | 5 | 7 | 6 | 8 |
| Not interested | 11 | 9 | 6 | 8 | 8 | 7 | 9 | 8 |
| <i>Base</i> | 1,159 | 960 | 780 | 865 | 930 | 745 | 866 | 892 |

Over the years, the groups consistently less likely to have visited the outdoors in the previous 12 months included those aged 55 and over, those in the DE social grades, those with no car access, those not in paid employment, those with no children in the household and those living in the 10% most deprived areas in the Scottish Index of Multiple Deprivation, or SIMD.⁵

3.1.3 Influence of affluence on visits

As highlighted previously, factors relating to affluence and levels of disposable income (e.g. car ownership) are seen to correlate with the likelihood of visiting the outdoors. Table 2 below highlights varying levels of participation in outdoor recreation within the last 12 months amongst different groups within the Scottish adult population.

⁵ See Annex 6 for further details

Table 2 . Percentage of adults taking any recreation visits to the outdoors in Scotland in the 12 months prior to being interviewed

Base: All respondents

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % |
| Social grade | | | | | | | |
| AB | 91 | 89 | 89 | 89 | 92 | 92 | 91 |
| C1 | 84 | 82 | 84 | 84 | 88 | 87 | 83 |
| C2 | 78 | 82 | 78 | 77 | 84 | 82 | 79 |
| DE | 67 | 70 | 68 | 68 | 72 | 73 | 67 |
| Access to a car | | | | | | | |
| Yes | n/a | 85 | 84 | 84 | 88 | 87 | 85 |
| No | n/a | 66 | 62 | 66 | 71 | 71 | 64 |
| Internet access | | | | | | | |
| Yes | n/a | n/a | n/a | 86 | 89 | 89 | 84 |
| No | n/a | n/a | n/a | 63 | 64 | 62 | 58 |
| Working status | | | | | | | |
| Working | 87 | 87 | 84 | 87 | 89 | 90 | 86 |
| Not working | 71 | 73 | 72 | 71 | 75 | 74 | 70 |
| Base | 11,306 | 11,133 | 12,174 | 12,200 | 12,209 | 12,356 | 12,119 |

n/a= not asked

As shown in Table 2, members of the AB social grades, those with access to a car, those with access to the Internet and those in paid employment have consistently recorded higher levels of outdoor recreation participation than those in lower social grades (particularly DEs), those with no access to a car, those with no Internet access and those not in paid employment. Despite a trend for shorter, closer to home visits (see later), people with access to a car remain more likely to take visits to the outdoors for recreation.

Amongst those who had visited the outdoors in the 4 weeks prior to interview, differences in visit behaviour have also been recorded over the years, including:

- Travelling to the main visit destination on foot – more likely amongst those in the DE social grades and those with no Internet access;
- Travelling to the main destination by car – more likely amongst those in the AB, C1 and C2 social grades and those with Internet access;
- Visiting alone – more likely amongst those with no Internet access and those with no access to a car;
- Main activity walking for less than 2 miles – more likely amongst DEs, those not in paid employment and those with no Internet access;
- Visiting the countryside – more likely amongst those with access to a car;
- Visiting an urban destination – more likely amongst those with no access to a car and those in the DE social grades.

3.1.4 Increase in shorter, local visits

A trend that has become increasingly apparent over the years is an increase in the percentage of shorter duration, closer to home visits being taken on foot.

Table 3. Variations in transport used, distance travelled and duration of visit 2004 - 2012

| | 2004 | 2012 | Change 2004 - 2012 |
|------------------------------|----------------------|----------------------|---------------------------|
| Main transport used | | | |
| On foot/ walking | 50% | 64% | +14 |
| Car/ van/ minibus | 43% | 30% | -13 |
| Distance travelled | | | |
| <5 miles | 60% | 74% | +14 |
| >10 miles | 24% | 16% | -8 |
| <i>Mean distance (miles)</i> | <i>16 miles</i> | <i>9 miles</i> | <i>-7 miles</i> |
| Visit duration | | | |
| <1hr | 20% | 27% | +7 |
| <3 hrs* | 66% | 81% | +15 |
| >5 hrs | 17% | 7% | -10 |
| <i>Mean duration</i> | <i>2 hrs 30 mins</i> | <i>2 hrs 11 mins</i> | <i>-19 mins</i> |

*Includes proportion spending <1hr on visit

While some variations may have been recorded over the years, Table 3 above highlights the overall changes that have been recorded since the survey began in terms of the distances travelled, duration of visit and transport used on visits to the outdoors. The proportion of visits where the main destination was reached on foot has risen by fourteen percentage points since 2004, while increases of fourteen percentage points and seven percentage points respectively have been recorded in the proportions of visits involving a journey to and from the main destination of up to 5 miles and the proportion of visits lasting less than one hour. Since 2004, the average distance travelled has reduced by 7 miles to an average of 9 miles while the average visit duration has fallen by 19 minutes to an average of 2 hours and 11 minutes.

Data collected since 2004 in relation to destinations visited also serves to highlight the increased importance of local visits. Please note that these data relate to all destinations visited and not just the main visit destination.

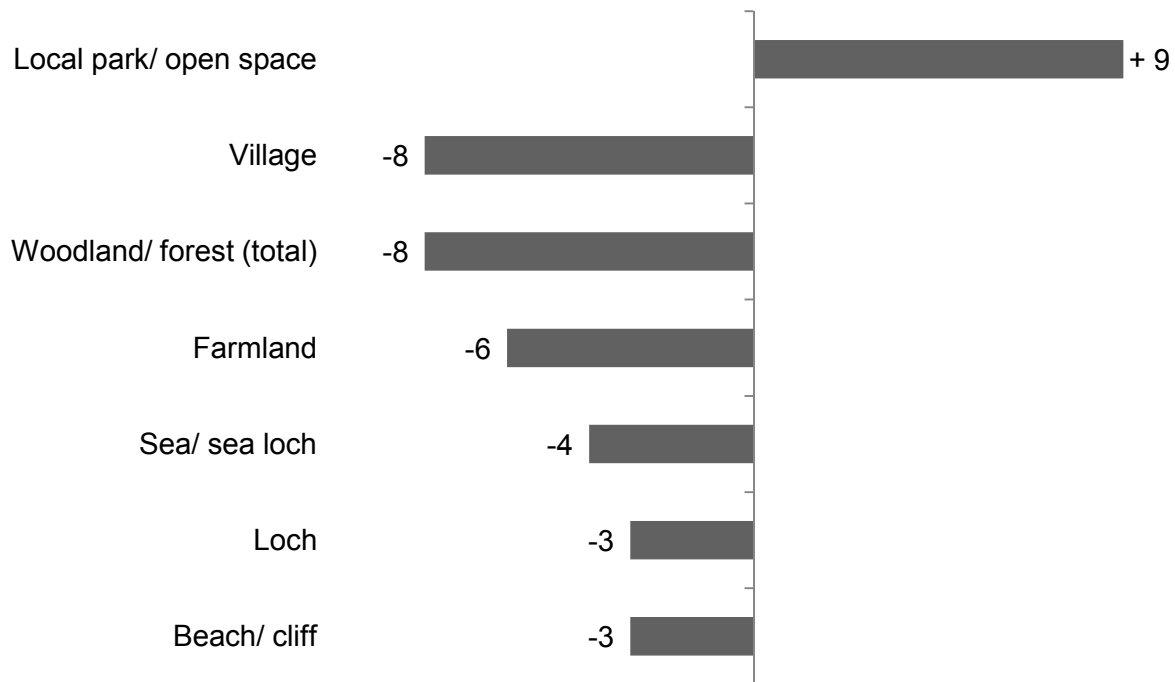


Figure 4. Variations in visits to specific destinations (all destinations visited) 2004 to 2012 (percentage point differences)

As shown in Figure 4, since 2004, the proportion of visits made to some types of destination has decreased. Local parks and open spaces have, however, recorded an overall increase of nine percentage points and account for 32% of all visits in 2004 and 41% in 2012. Parks and open spaces have also been the most frequently visited main location, accounting for between 35% and 37% of visits to the outdoors each year between 2005 and 2012.

3.1.5 Increase in urban visits

Throughout the years that the ScRS has been undertaken, countryside locations have maintained their position as the most frequently visited type of location. However, as Figure 5 below shows, visits to urban destinations have seen an overall increase over the years.

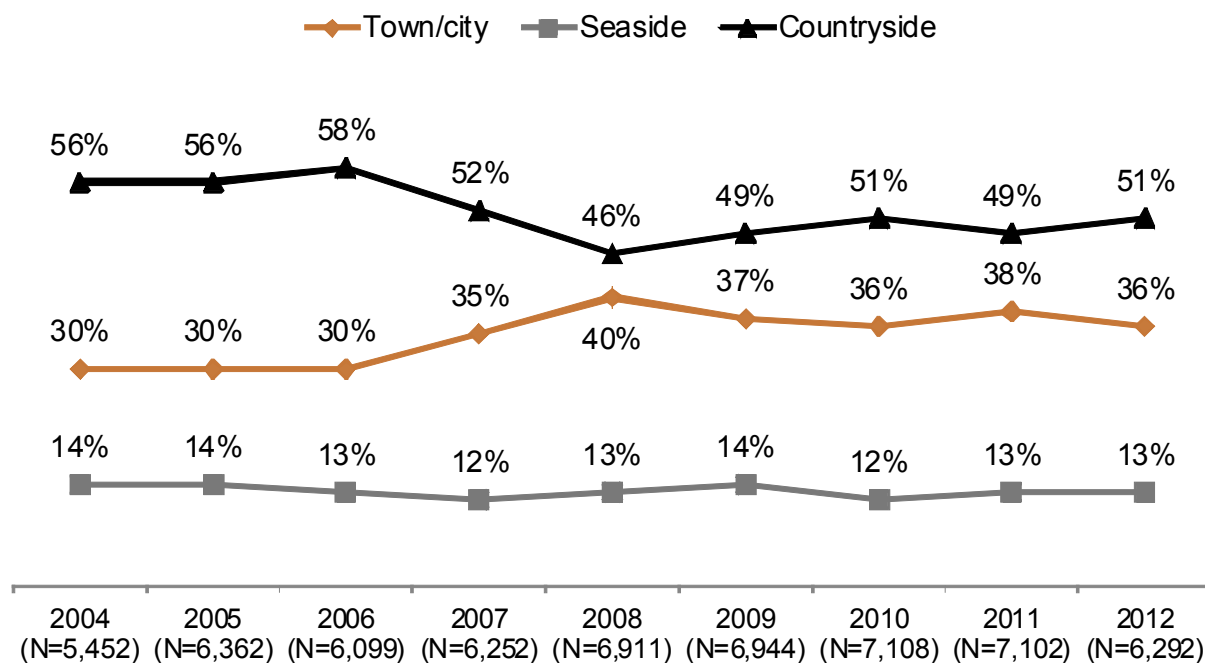


Figure 5. Type of destination visited on most recent visit (2004 – 2012)

Base: All who visited outdoors in last 4 weeks

As shown in Figure 5, three in ten visits taken in the 4 weeks prior to interview in 2004 were to an urban location (30%). This proportion has risen overall to 36% in 2012, with a peak of four in ten visits being taken to urban locations in 2008. When interpreting this finding, it is worth noting that the majority of the Scottish population live in areas defined as urban (68%).⁶

3.1.6 Dominance of walking

Amongst those visiting the outdoors, walking has consistently been recorded as the main activity undertaken on the majority of visits, rising from 69% of visits in 2004 to a peak of 78% in 2008 before falling to 73% in 2012.

⁶ As defined by Scottish Government.

Table 4. Walking as single main activity undertaken during outdoor recreation visits
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|-----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % | % |
| All walking | 69 | 70 | 72 | 77 | 78 | 75 | 73 | 74 | 73 |
| - Walking < 2 miles | 28 | 30 | 29 | 37 | 37 | 34 | 29 | 31 | 33 |
| - Walking 2-8 miles | 38 | 36 | 40 | 38 | 37 | 38 | 40 | 40 | 37 |
| - Walking more than 8 miles | 2 | 2 | 2 | 1 | 2 | 2 | 2 | 2 | 2 |
| - Hill walking/ mountaineering | 1 | 2 | 1 | 1 | 1 | 1 | 2 | 1 | 2 |
| Base | 5,452 | 6,362 | 6,099 | 6,252 | 6,911 | 6,944 | 7,108 | 7,102 | 6,292 |

When analysed by the type of walking undertaken, the proportion of people taking walks of between 2 and 8 miles in length has remained relatively consistent over the years (in the range 36% to 40%). The proportion taking walks of less than two miles has been somewhat more variable, although the overall increase from 28% in 2004 to 33% in 2012 correlates with the trend for increasingly short and more local visits to the outdoors.

Shorter walks are more likely to be taken in towns and cities, the type of destination more likely to be visited by those in the DE social grades, those without access to a car and/or the Internet and those not in paid employment. The volume of visits taken by these groups has tended to be more variable than for other groups within the population, which contributes to the fluctuating proportions taking part in shorter walks.

3.1.7 Decreasing awareness of Scottish Outdoor Access Code

The Land Reform (Scotland) Act 2003 and the Scottish Outdoor Access Code (the Code) came into effect in Scotland on 9 February 2005 and established a statutory right of responsible access to most land and inland water. SNH has a duty to prepare, issue and publicise the Code and to review its effectiveness. To help monitor awareness and understanding of the Code, appropriate questions have been included in the Scottish Recreation Survey. Please note that from September 2009, these questions were included in the survey on a bi-annual rather than on a quarterly basis.

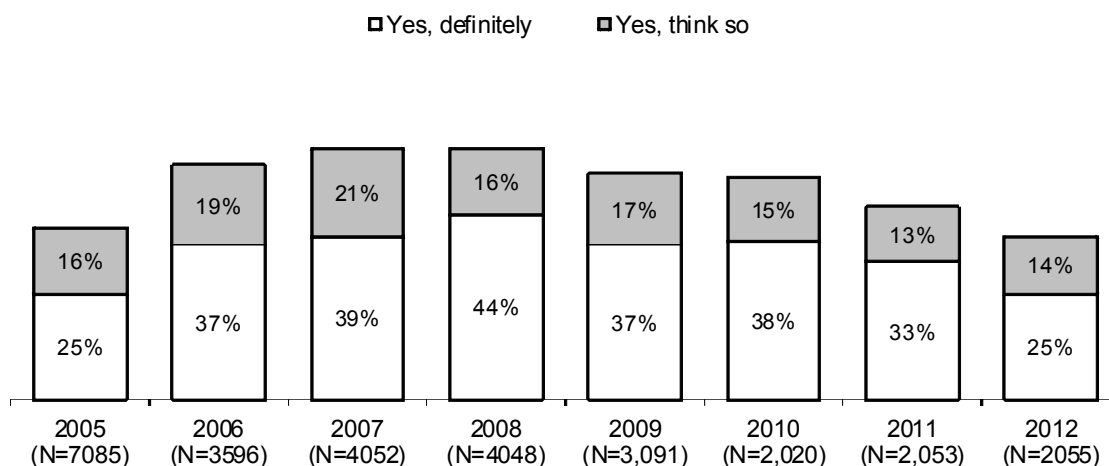


Figure 6. Percentage of Scottish adult population aware of Scottish Outdoor Access Code 2005 to 2012

Base: All respondents

As shown in Figure 6 above, awareness of the SOAC has varied over time. It is likely that some of this variation may be attributable to the weight and type of promotional activity undertaken in any given year. In 2008, and in the midst of a television campaign promoting the Code, six in ten members of the population indicated that they were aware of the Code (60%), with over two-fifths stating that they were ‘definitely’ aware of it (44%). Since 2008, however, and with no presence on TV since 2009, awareness of the Code has been in decline, with only a quarter of the population indicating that they were definitely aware in 2012.

Those most likely to be aware of the Code include those who visit the outdoors on a frequent basis, those taking visits lasting 3 hours or more, those living in rural areas and those who visit countryside locations.

3.2 Visits to the outdoors for leisure and recreation in the last 12 months

During 2012, 79% of the Scottish adult population stated that they had made at least one visit to the outdoors for recreation purposes, within Scotland, in the previous 12 months. This represents a significant decrease on the proportions recorded in the two previous years (83% in both 2010 and 2011), and is similar to the levels recorded between 2006 and 2009.

On a monthly basis in 2012, the lowest level of reported participation over the previous twelve months was recorded in November (74% had taken a visit), which compares to a figure of 84% recorded for the month of June.⁷ The greatest differences between 2011 and 2012 by month were recorded during the spring and summer months, particularly for July (87% in 2011, 78% in 2012) and also for October (82% in 2011, 75% in 2012).

⁷ Please note that these figures relate to the percentage of respondents who had taken any trips in the twelve months prior to being interviewed and not participation in the individual months mentioned.

Table 5. Percentage of adults taking any recreation visits to the outdoors in Scotland in the 12 months prior to being interviewed

Base: All respondents

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % |
| All respondents | 79 | 80 | 79 | 79 | 83 | 83 | 79 |
| Social grade | | | | | | | |
| AB | 91 | 89 | 89 | 89 | 92 | 92 | 91 |
| C1 | 84 | 82 | 84 | 84 | 88 | 87 | 83 |
| C2 | 78 | 82 | 78 | 77 | 84 | 82 | 79 |
| DE | 67 | 70 | 68 | 68 | 72 | 73 | 67 |
| Age | | | | | | | |
| Under 35 years | 87 | 86 | 85 | 86 | 90 | 91 | 85 |
| 35-54 years | 85 | 85 | 84 | 86 | 88 | 87 | 83 |
| 55+ years | 67 | 71 | 71 | 70 | 73 | 71 | 69 |
| Base | 11,306 | 11,133 | 12,174 | 12,200 | 12,209 | 12,356 | 12,119 |

Table 5 (above) also shows levels of participation in outdoor recreation by social grade.⁸ As in previous years, the influence of a respondent's social grade on their likelihood to participate in outdoor recreation and leisure activities remained apparent in 2012, with 91% of those in the AB social grades (professional and managerial occupations) having made visits to the outdoors compared to 67% of those in the DE social grades (unskilled manual occupations or unemployed).

Participation in outdoor recreation visits amongst those in the AB social grades remained similar between 2011 and 2012, with around nine in ten of these respondents having taken a visit in the last 12 months. A decrease in participation was recorded amongst members of the C1 social grade, from 87% having visited in the last 12 months in 2011 to 83% in 2012. The greatest difference between the two years, however, was recorded for those in the DE social grades, 67% of whom had visited the outdoors for leisure in the previous 12 months in 2012 compared to 73% in 2011.

Variations in participation amongst different age groups continued to be apparent in 2012, as shown in Table 5. In all survey years (2006 – 2012), respondents aged under 55 were more likely to make an outdoor visit for leisure and recreation than older respondents. However, it was the younger age groups that recorded significant decreases in overall participation between 2011 and 2012. This is particularly evident for those between the ages of 16 and 35, 91% of whom had visited the outdoors at least once in the previous 12 months in 2011 compared to 85% in 2012.

Other groups in 2012 significantly less likely to have visited the outdoors in the previous 12 months when compared to 2011 included:

- those with no Internet access (62% had made any visits in 2011, decreasing to 58% in 2012);
- those with no car access (71% to 64%);
- those living in the 10% most deprived areas in Scotland (75% to 69%);

⁸ Definitions of social grades are provided in Annex 1

- those not in paid employment (74% to 70%);
- those with no children in the household (78% to 74%);
- those interviewed between October and December (80% to 76%);
- those living in urban areas (82% to 78%);
- those with no limiting illness or disability (89% to 83%).

3.3 Frequency of outdoor visits in the last 12 months

All respondents were asked to indicate how often they had visited the outdoors for leisure and recreation in Scotland during the previous 12 months.

Table 6. Frequency of recreation visits to the outdoors in 12 months prior to being interviewed

Base: All respondents

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|--------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % |
| At least once per week** | 44 | 44 | 47 | 46 | 48 | 46 | 42 |
| - at least once per day | 13 | 14 | 16 | 14 | 13 | 14 | 12 |
| - several times per week | 15 | 15 | 16 | 17 | 18 | 17 | 16 |
| - once a week | 16 | 15 | 14 | 15 | 16 | 16 | 14 |
| 1-2 visits per month | 17 | 17 | 15 | 16 | 17 | 17 | 15 |
| Once every 2-3 months | 10 | 10 | 9 | 9 | 10 | 10 | 11 |
| Once or twice | 8 | 9 | 9 | 9 | 8 | 9 | 10 |
| Never | 21 | 20 | 21 | 21 | 17 | 17 | 21 |
| <i>Base</i> | 11,306 | 11,133 | 12,174 | 12,200 | 12,209 | 12,356 | 12,119 |

Note: **percentages may not equal the sum of sub categories due to rounding

As Table 6 illustrates, 42% of Scottish adults visited the outdoors at least once per week in 2012. This represents a decrease on the 2011 figure of 46% and is the lowest recorded since 2006. There was also a significant decrease in the proportion visiting every day between 2011 and 2012 (14% to 12%). The largest variation, however, was in the proportion who indicated that they had not taken any visits to the outdoors in the last 12 months (up from 17% in 2011 to 21% in 2012).

These weekly participation data are used by the Scottish Government to measure progress on the National Indicator (NI) to “increase people’s use of Scotland’s outdoors.” The outdoor visits NI figures provide the Scottish Government with a measurable benchmark for its National Performance Framework, Scotland Performs, which gathers information on how Scotland is performing on a range of topics affecting all aspects of Scottish life.

Further analysis indicates that those respondents more likely to take visits to the outdoors at least once a week included those whose main activity on their most recent visit was golf (89% of whom visited the outdoors at least once a week), running or jogging (86%), any cycling (78%) or any walking (77%); others also more likely to visit weekly included those whose most recent visit lasted less than 3 hours (80%), those who most recently visited an urban location (76%), members of the AB social grades (57%), those with children in the household (52%), those living in rural areas (52%), those in part-time paid employment

(49%), those with a car in their household (47%), those interviewed between July and September (46%) and those aged under 55 (45%).

Those most likely to state that they had made no outdoor recreation visits in the last twelve months included those with a long-term illness or disability (43% had made no visits), those with no Internet access (42%), those with no car in the household (36%), those in the DE social grades (33%), those living in the 10% most deprived areas in Scotland (31%), those aged 55 and over (31%), those not in paid employment (30%) and those with no children in the household (26%).

Figure 7 shows the percentage of residents in 18 of Scotland's 32 Local Authorities stating that they visit the outdoors at least once a week. These estimates are produced only once every third year by aggregating data for a separate three year period; the estimates shown in Figure 7 are for the period 2009 – 2011 (when 47% of adults in Scotland visited the outdoors at least once a week) and do not, therefore, include 2012 data. Aggregating the data in this way provides a larger sample size of residents in each Local Authority area and increases the accuracy of the results.

Participation data are not available for the remaining 14 Local Authorities as the cumulative sample sizes for these areas are not large enough and/or an uneven seasonal distribution of interviews means that it is not possible to provide reliable estimates. Further details regarding the presentation of results at a Local Authority level are provided in Annex 5.

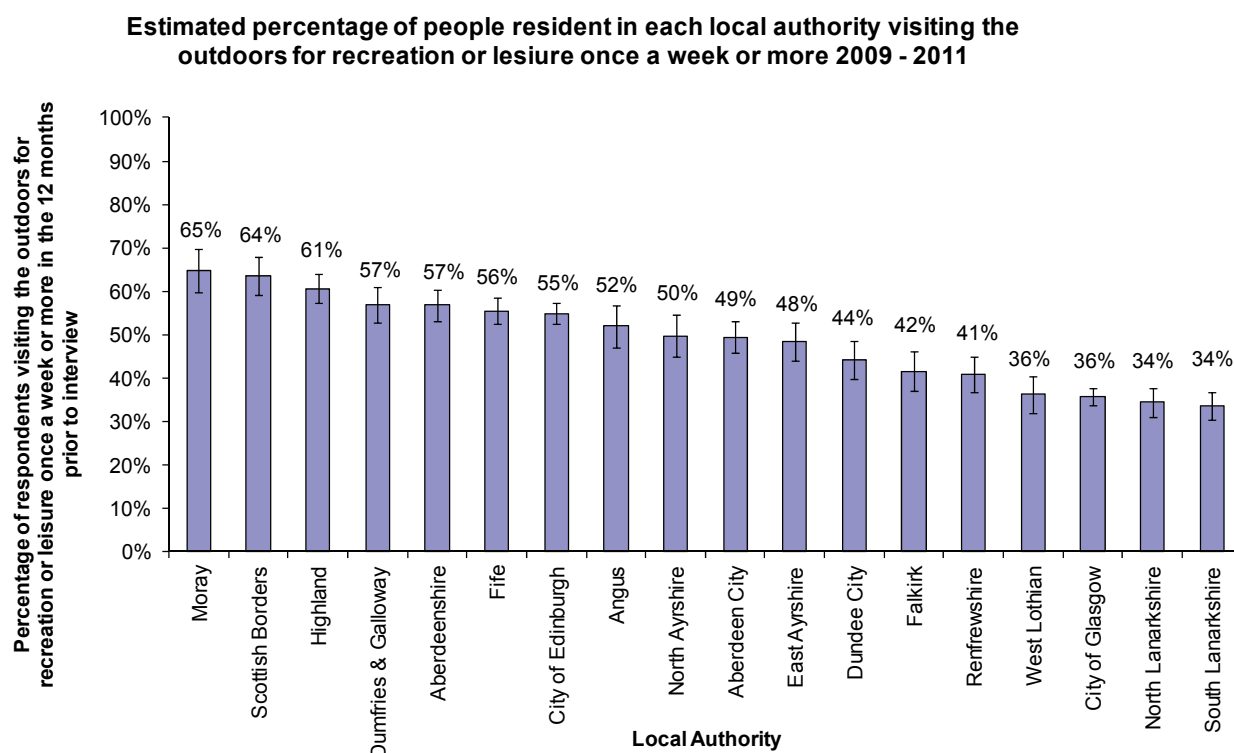


Figure 7. Percentage of adult residents normally taking visits to the outdoors at least once per week, by local authority area 2009 to 2011
Base: All respondents

Note: Error bars are included to provide an indication of the accuracy of each estimate.

Over this combined 3 year period, 65% of those adults resident in Moray took outdoor recreation visits at least once a week compared to 34% of those who live in South Lanarkshire and 34% of those who live in North Lanarkshire.

3.4 Reasons for not visiting the outdoors in the last 12 months

Respondents who claimed that they had not made any visits to the outdoors in Scotland for leisure and recreation purposes for at least 12 months were asked to state their reasons.

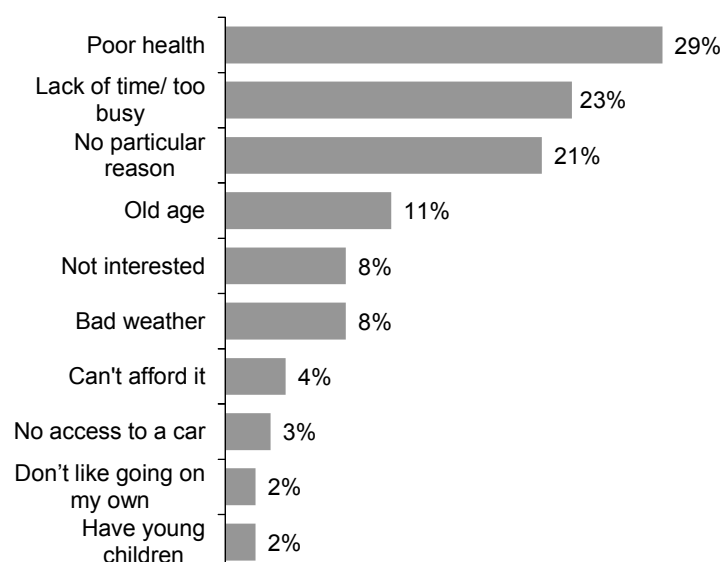


Figure 8. Reasons for not visiting the outdoors for recreation in last 12 months

Base: Respondents who had not visited the outdoors for recreation in the 12 months prior to being interviewed (1018)

Note: More than one answer is possible so the sum of percentages may be over 100%

As Figure 8 illustrates, poor health and lack of time remained the most frequently mentioned reasons for not visiting the outdoors in 2012. While the proportion mentioning lack of time as a barrier was very similar to the 2011 figure of 24%, the proportion mentioning poor health fell from 35% in 2011 to 29% in 2012.

Poor health was mentioned more frequently than the average by those with a long-term illness or disability (66%), those aged 55 and over (46%), those in social grade DE (40%) and those with no children in the household (34%). Amongst respondents mentioning poor health, the largest *decreases* in mentions were recorded for those aged 55 and over (51% in 2011 to 46% in 2012) and those not in paid employment (51% to 44%).

Lack of time was mentioned more frequently than average by those in paid employment (50%), those aged 34 and under (41%), those with children in the household (35%), those in the C2 social grade (39%) and those with no long-term illness or disability (37%).

In 2012, the proportion stating that they 'could not afford' to visit the outdoors, although small, represents a significant increase on the proportion doing so in 2011 (1% in 2011 to 4% in 2012). Nine per cent of those in a household with children indicated that this was a barrier in 2012, as did 8% of those living in the 10% most deprived areas in Scotland.

Around a fifth of non-visitors indicated that they had ‘no particular reason’ for not visiting the outdoors (21%), an increase from the proportion mentioning this in 2011 (16%). Those most likely to provide this response included those living in rural areas (30%) and those with no long-term illness or disability (29%).

3.5 Volume of visits to the outdoors in the four weeks prior to interview

Between 2006 and 2011, the percentage of the adult population in Scotland taking visits to the outdoors in the 4 weeks prior to being interviewed remained consistent (in the range 58% to 59%). However, this proportion decreased in 2012 to 54%.

The percentage of the Scottish adult population reporting taking visits during the previous 4 weeks in each quarter of the year varied as follows:

- January to March 2012 – 52% (55% in 2011, 49% in 2010, 55% in 2009, 54% in 2008; 51% in 2007 and 2006)
- April to June 2012 – 56% (65% in 2011, 66% in 2010, 64% in 2009, 65% in 2008; 58% in 2007; 59% in 2006)
- July to September 2012 – 60% (65% in 2011, 66% in 2010, 63% in 2009, 65% in 2008; 63% in 2007; 65% in 2006)
- October to December 2012 – 50% (49% in 2011, 52% in 2010, 50% in 2009, 53% in 2008; 55% in 2007; 53% in 2006).

The proportion of respondents who had taken visits in the April to June 2012 period is significantly lower than in 2011 (56% and 65% respectively) and is the lowest recorded since 2006. Likewise, the July to September figure fell from 65% in 2011 to 60% in 2012. These changes may relate, in part, to a period of particularly wet weather with Scotland experiencing higher than average rainfall during April, June and July, as well as lower than average sunshine hours in June and July.

Those who had visited the outdoors in the 4 weeks prior to interview were then asked to indicate how many visits they had made in that period. As shown in Table 7 below, the volume of visits was lower in 2012, with 64% of participants having taken fewer than 10 visits in the 4 weeks prior to interview compared to 60% in 2011.

Table 7. Number of recreation visits taken to the outdoors in 4 weeks prior to interview
Base: Respondents who had made visits to the outdoors for recreation in the 4 weeks prior to being interviewed

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % |
| 1-3 visits | 35 | 35 | 32 | 32 | 32 | 32 | 34 |
| 4-9 visits | 30 | 29 | 28 | 28 | 29 | 28 | 30 |
| 10-14 visits | 9 | 9 | 9 | 10 | 10 | 11 | 10 |
| 15-28 visits | 19 | 22 | 22 | 22 | 20 | 21 | 18 |
| 29+ visits | 7 | 5 | 9 | 7 | 8 | 8 | 7 |
| Mean number of visits | 11 | 11 | 12 | 12 | 11 | 12 | 11 |
| <i>Base</i> | 6,099 | 6,252 | 6,911 | 6,944 | 7,108 | 7,102 | 6,292 |

Note: Percentages may not equal 100% due to rounding

Table 7 also illustrates the average (mean) number of visits taken in the 4 weeks prior to interview, amongst those who had visited the outdoors in that period. This has been in the range 11 to 12 visits over the past seven years.

Over the years, those over the age of 55, those living in rural areas and those visiting for less than 3 hours have consistently been more likely than the average amongst the Scottish adult population to take trips to the outdoors on a frequent basis (average of 13 visits each in 2012).

As illustrated below, the frequency of visit taking is not evenly distributed, with the largest percentages of participants taking 4 visits, equating to once a week (16%), 1 visit (15%), 2 visits (13%) or 28 visits (11%), potentially once a day during the 4 weeks prior to interview. These proportions are similar to those recorded in previous years.

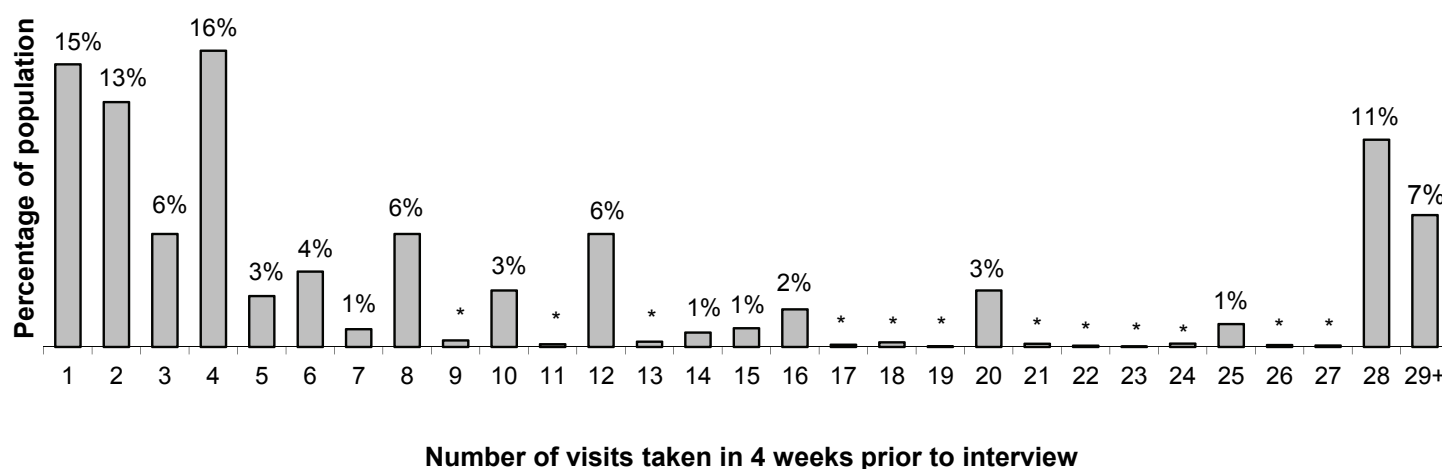


Figure 9. Number of outdoor recreation visits taken in the 4 weeks prior to interview
Base: Respondents who had made visits to the outdoors for recreation in the 4 weeks prior to being interviewed (6,292)

Note: * = less than 0.5%
 Percentages may not equal 100% due to rounding

While the mean number of visits taken in a 4 week period was 11, the median⁹ number was 4. The median was highest amongst those whose most recent visit lasted for less than 3 hours, those who ran or jogged on their most recent visit and those who walked for less than 2 miles on their most recent visit (median 8 visits each).

3.6 Estimate of total volume of visits taken in 2012

Using the data collected in 2012, it is possible to produce an estimate of the overall volume of visits taken to the outdoors in Scotland for the purposes of leisure and recreation. This estimate is based upon the following data:

- In 2012, 79% of Scottish adults took at least one visit to the outdoors for leisure and recreation in the previous twelve months. This estimate is accurate to +/-0.6% at the 95% confidence interval. Based on an adult population of 4.1 million, this equates to a total of 3.2 million adults taking at least one visit to the outdoors.⁹

⁹ For continuity purposes, the population figure quoted is the same as that used in previous reports and is based on the 2001 census population figure.

- Across the year as a whole, the average number of outdoor visits taken per respondent in the 4 week period prior to interview was 5.6. This estimate ranges from 5.4 to 5.8 at the 95% confidence interval and includes those who did not take any visits during this time period.

On this basis, Figure 10 below illustrates the estimated volume of visits taken each year during the 2006 to 2012 period (see footnote 4 for details of margins of error).

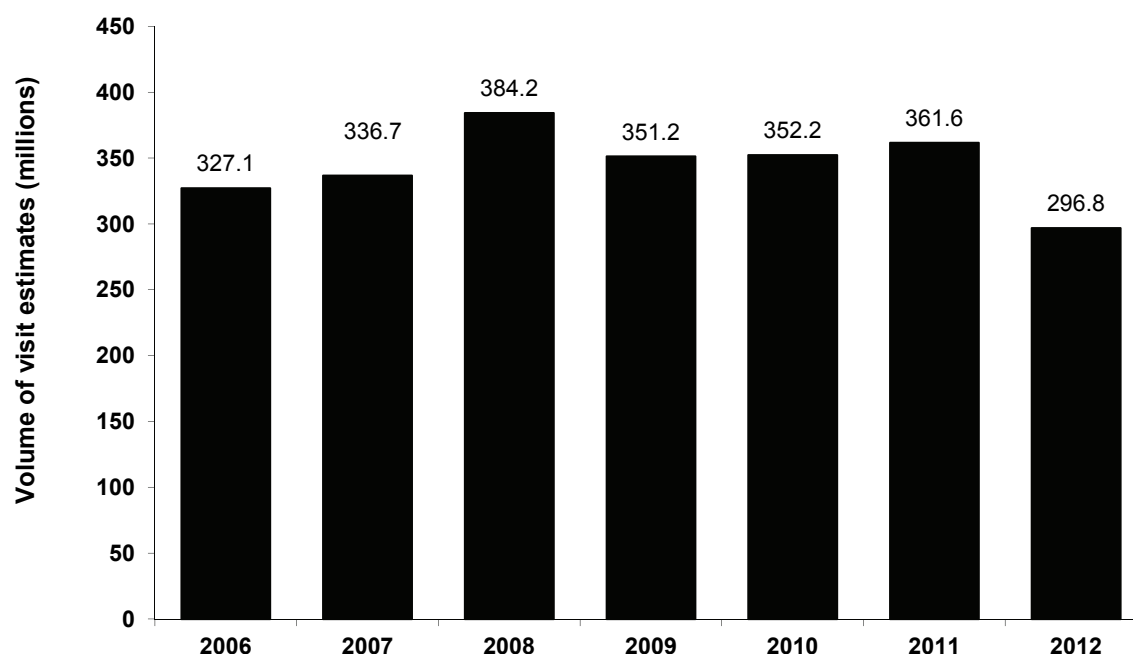


Figure 10. Annual estimated volume of visits taken to the outdoors for recreation in Scotland¹⁰

The overall estimate is 297 million outdoor recreation visits during 2012, a lower figure than the 2011 estimate of 362 million and the lowest estimate recorded since 2006.¹¹ The lower proportion of those taking visits in the 4 weeks prior to interview (54% in 2012 compared to 59% in 2011) and a reduction in the average number of visits taken (5.6 in 2012 compared to 6.8 in 2011) have contributed to this reduction in estimated visit numbers for 2012.

Figure 11 (below) illustrates the estimated volume of visits recorded in each quarter during the 2006 to 2012 period.

¹⁰ Please note that the 2011 estimates have been revised and differ from those published in previous reports.

¹¹ Taking account of margins of error, at the 95% confidence level estimated total visits range from 277 to 317 million in 2012, 351 to 372 million in 2011, 342 to 363 million in 2010, 341 to 362 million in 2009, 373 to 398 million in 2008, 327 to 347 million in 2007 and from 317 to 337 million in 2006.

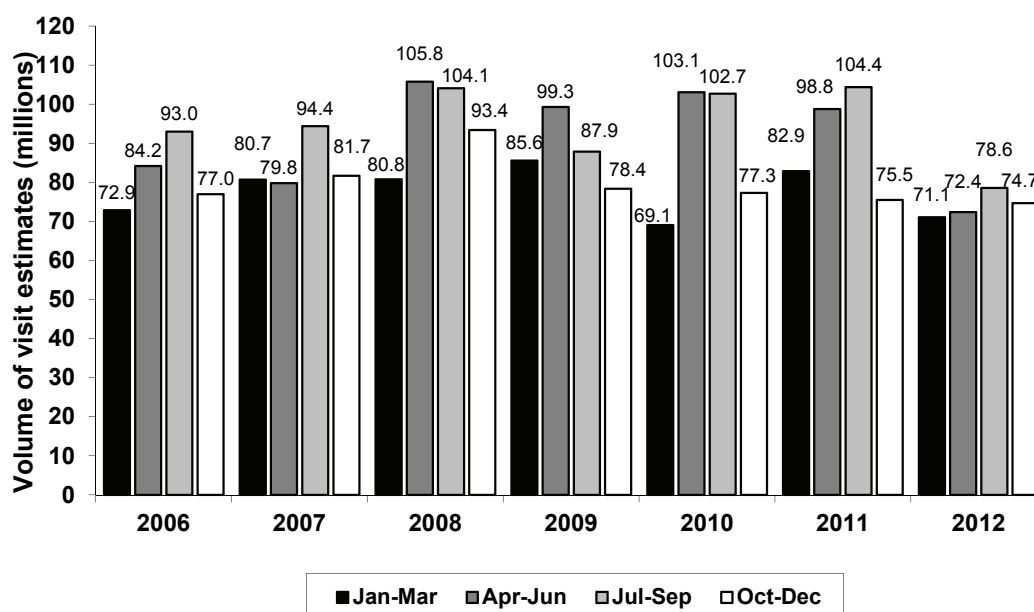


Figure 11. Estimated volume of visits taken to the outdoors for recreation in Scotland – by quarter¹²

October and November 2012 were the months in which the lowest proportions of respondents reported having taken a visit in the previous 4 weeks (46% in each month). These proportions were also lower than those recorded in the same months in most previous survey years.

Figure 12 (below) illustrates the estimated volume of visits to different locations recorded during the 2006 to 2012 period.

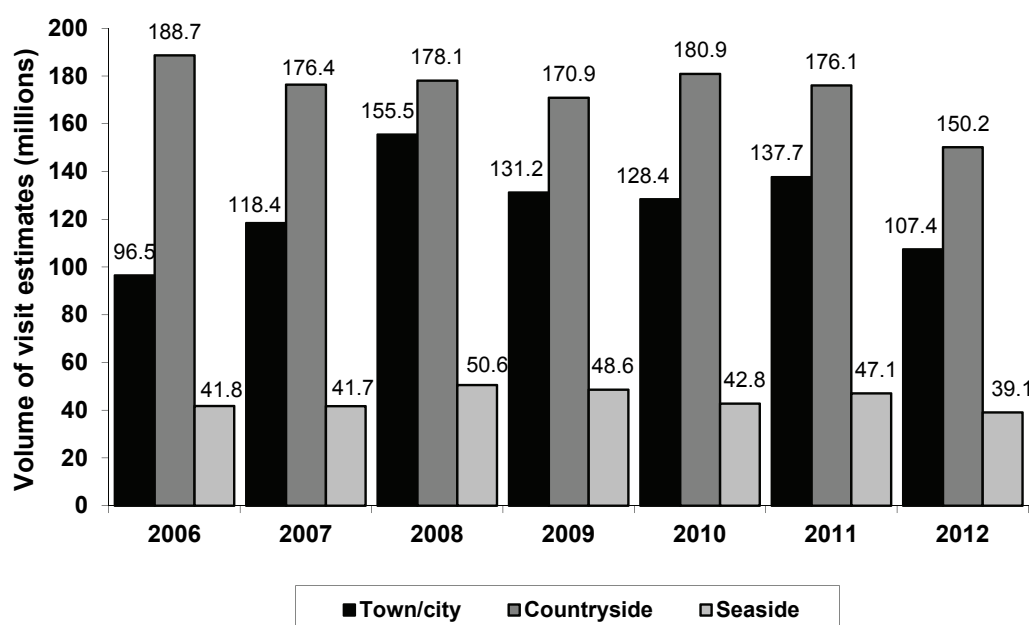


Figure 12. Estimated volume of visits taken to the outdoors for recreation in Scotland – by location¹³

¹² Please note that the 2011 estimates have been revised and differ from those published in previous reports.

¹³ Please note that the 2011 estimates have been revised and differ from those published in previous reports.

In 2012, the highest volume of visits (51% of the total) was taken to destinations in the countryside whilst 36% of visits were taken in an urban environment. The volume of visit estimates for town and city locations have shown the greatest variation over the years. The fluctuation in visits to urban areas is broadly similar to that recorded for all visits, which suggests that visits to urban locations have had the greatest influence on the all visits data.

Table 8 (below) illustrates the percentage change in the estimated number of outdoor recreation visits taken by quarter and by location between 2011 and 2012.

Table 8. Annual variations in estimated volume of visits taken to the outdoors for recreation in Scotland¹⁴

| | Change 2011 to 2012 |
|---------------------|----------------------------|
| Quarter | |
| January to March | -14% |
| April to June | -27% |
| July to September | -25% |
| October to December | -1% |
| Location | |
| Town or city | -22% |
| Countryside | -15% |
| Seaside | -17% |
| TOTAL | -3% |

The influence of the poor summer weather in 2012 is evident, with the estimated number of outdoor recreation visits taken during the second quarter of 2012 27% lower than in 2011 and the estimated number of visits in the third quarter 25% lower than in 2011. The smallest decrease in visits (-1%) was recorded for the October to December quarter in 2012. Compared to 2011, the number of visits taken to urban locations decreased in 2012 by 22%.

Most of the remaining analysis of visits made to the outdoors for leisure and recreation purposes is based on those respondents who had made visits in the previous 4 weeks – a total of 6,292 respondents. However, it should be noted that not all of the questions are included in the survey every month. Consequently, the sample of respondents can alter depending on the frequency with which a particular question is asked within the survey programme. When interpreting results, readers should note the estimated margins of error provided at the beginning of Section 3 of this report and the base sizes featured in the tables.

It should also be noted that respondents who have taken any outdoor recreation visits in the 4 weeks prior to interview are asked to provide the details of the visit that they have taken most recently. To make the results of questions regarding the most recent visit as representative as possible of all of the visits taken during the survey period, responses have been weighted by a factor equal to the number of visits taken by the respondent in the 4 weeks prior to interview. For example, the responses provided by a respondent who has

¹⁴ Please note that the 2011 estimates have been revised and differ from those published in previous reports.

taken 2 visits in the 4 week period are multiplied by 2. The following results relating to visit characteristics are, therefore, representative of all visits taken, not just the most recent visit. It is reasonable to assume that the data collected on the most recent visit taken by respondents provides a representative sample of all visits taken given the distribution of fieldwork timing and the application of these weights.

3.7 Activities undertaken on visits to the outdoors

Respondents were asked about both the main activity which they participated in and any other activities which formed part of their visit. Table 9 features the main activities that were mentioned by respondents.

Table 9. Single main activity undertaken during outdoor recreation visits
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | % | % | % | % | % | % | % | % | % |
| All walking | 69 | 70 | 72 | 77 | 78 | 75 | 73 | 74 | 73 |
| - Walking < 2 miles | 28 | 30 | 29 | 37 | 37 | 34 | 29 | 31 | 33 |
| - Walking 2-8 miles | 38 | 36 | 40 | 38 | 37 | 38 | 40 | 40 | 37 |
| - Walking more than 8 miles | 2 | 2 | 2 | 1 | 2 | 2 | 2 | 2 | 2 |
| - Hill walking/ mountaineering | 1 | 2 | 1 | 1 | 1 | 1 | 2 | 1 | 2 |
| Family Outing | 9 | 10 | 10 | 7 | 6 | 7 | 8 | 9 | 8 |
| Any cycling/ mountain biking | 4 | 4 | 4 | 4 | 3 | 4 | 5 | 4 | 4 |
| - Cycling on paths and tracks | 3 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| - Cycling on public roads | 1 | 1 | 2 | 1 | 1 | 1 | 2 | 1 | 2 |
| Running/ jogging | 3 | 2 | 2 | 3 | 2 | 3 | 3 | 3 | 3 |
| Golf | 1 | 2 | 1 | 1 | 2 | 2 | 2 | 2 | 2 |
| Sightseeing/ visiting attractions | 3 | 3 | 2 | 2 | 1 | 2 | 2 | 2 | 2 |
| Horse riding | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Fishing | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Watersports | * | 1 | * | * | 1 | 1 | 1 | * | 1 |
| Picnicking | 1 | * | 1 | * | * | 1 | 1 | 1 | 1 |
| Playing/watching football | - | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Other sports | - | - | - | 1 | 1 | 1 | 1 | 1 | 1 |
| Base | 5,452 | 6,362 | 6,099 | 6,252 | 6,911 | 6,944 | 7,108 | 7,102 | 6,292 |

Note: * = less than 0.5%;

- = no responses;

Percentages may not equal 100% due to rounding and the exclusion of 'don't know' responses from table

Since 2004, walking has been the most frequently undertaken main activity on visits to the outdoors. The proportions undertaking any type of walking as the main activity on their visit have been relatively stable over the past four years with the 2012 figure of 73% very similar to the 2011 figure of 74%. When analysed by the type of walking undertaken, the proportion walking for between two and eight miles has fallen from 40% in 2011 to 37% in 2012.

Those more likely to state that walking was the main activity on their most recent visit to the outdoors were:

- Those visiting the outdoors at least once per day (85% stated that walking was their main activity compared to 57% of those who visited less often);
- Older respondents, aged 55 and over (83% compared to 67% amongst those aged 34 and under);
- Those on shorter duration trips lasting less than 3 hours (80% compared to 44% amongst those on trips of 3 hours or more);
- Respondents with a long-term illness or disability (80% compared to 71% amongst those without a long-term illness or disability);
- Women (78% compared to 67% amongst men);
- Those not in paid employment (78% compared to 69% amongst those in paid employment);
- Respondents without children at home (78% compared to 64% amongst those with children in the household);
- Respondents in rural areas (77% compared to 70% amongst those living in urban areas).

As in previous years, walking was relatively more popular as a main activity during the winter months, perhaps because other activities such as family outings are more likely to be undertaken in the summer. Walking was undertaken on 76% of visits to the outdoors recorded between January and March and 80% between October and December compared to 69% of visits recorded between April and June and 67% of visits recorded between July and September.

Those more likely to state that a shorter walk of less than 2 miles was the main activity of their most recent visit included respondents with a long-term illness or disability (51%), those with no Internet access (48%) and those not in paid employment (38%). This may reflect the impact of a limiting long-term illness or disability, as well as lower disposable income. A walk of less than 2 miles was also more likely to be the main activity on visits taken by those who visited the outdoors at least once a day (42%), those who visited a town or city destination (41%), those aged 55 and over (40%), women (39%), those interviewed between October and December 2012 (39%), those on a visit lasting less than 3 hours (39%) and those in the DE social grades (38%).

On 8% of outdoor recreation visits taken in 2012, the main activity was a 'family outing', a similar proportion to that recorded in 2011 (9%). Respondents more likely to mention this as their main activity included those visiting the outdoors less than once a month (19%), those with children in the household (17%), those whose most recent visit lasted 3 hours or more (17%), those aged under 35 (14%) and those living in the 10% most deprived areas in Scotland (14%). Women were more likely than men to state that a family outing was the main activity undertaken on their most recent visit (10% and 6% respectively).

Table 10 (overleaf) shows levels of participation in **all activities** undertaken, not only the **main activity**. Activities participated in on 1% or more of all outdoor recreation visits are featured.

Table 10. All activities undertaken during outdoor recreation visits
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | % | % | % | % | % | % | % | % | % |
| All walking | 80 | 80 | 79 | 84 | 88 | 84 | 83 | 83 | 84 |
| - Walking < 2 miles | 35 | 37 | 33 | 42 | 44 | 42 | 36 | 39 | 36 |
| - Walking 2-8 miles | 45 | 42 | 47 | 46 | 49 | 48 | 49 | 49 | 53 |
| - Walking > 8 miles | 4 | 4 | 5 | 3 | 6 | 4 | 5 | 5 | 4 |
| - Hill walking/ mountaineering | 5 | 3 | 3 | 3 | 3 | 2 | 3 | 2 | 3 |
| Family Outing | 20 | 18 | 17 | 14 | 15 | 13 | 15 | 16 | 15 |
| All cycling/mountain biking | 8 | 7 | 7 | 6 | 6 | 7 | 6 | 8 | 8 |
| - Cycling on paths and tracks | 5 | 4 | 3 | 3 | 4 | 4 | 3 | 5 | 4 |
| - Cycling on public roads | 3 | 3 | 3 | 3 | 2 | 3 | 3 | 3 | 3 |
| - Cycling off-road | 1 | * | 1 | 1 | 1 | 1 | * | 1 | 1 |
| - Mountainbiking | 1 | 1 | 2 | 1 | 1 | 1 | 1 | 1 | 1 |
| Sightseeing/visiting attractions | 10 | 11 | 6 | 6 | 7 | 6 | 6 | 6 | 5 |
| Running/jogging | 4 | 4 | 3 | 4 | 4 | 3 | 5 | 4 | 4 |
| Bird watching | 8 | 7 | 3 | 3 | 5 | 4 | 4 | 3 | 4 |
| Picnicking | 7 | 6 | 4 | 5 | 5 | 4 | 4 | 5 | 3 |
| Other wildlife/nature watching | 9 | 7 | 4 | 3 | 6 | 5 | 4 | 3 | 3 |
| Fishing | 3 | 2 | 1 | 2 | 2 | 3 | 2 | 2 | 2 |
| Golf | - | - | - | 2 | 2 | 2 | 2 | 2 | 2 |
| Walking the dog | - | - | 1 | 3 | 2 | 3 | 1 | 2 | 2 |
| Playing/watching football | - | - | - | 1 | 1 | 1 | 1 | 1 | 2 |
| Other sports | - | - | - | 2 | 2 | 1 | 2 | 1 | 1 |
| Swimming in sea/rivers/lochs | 2 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Base | 3,191 | 2,702 | 2,013 | 2,169 | 2,284 | 2,436 | 2,370 | 2,542 | 2,038 |

Note: * Less than 0.5%; - = no responses;
More than one answer possible so sum of percentages may be over 100%

Over the years, walking has consistently been the most frequently undertaken activity overall with the 2012 figure of 84% equal or very similar to that recorded in the previous three years. Also in line with previous surveys, family outings were the second most frequently mentioned activity, with the 2012 figure of 15% similar to a number of previous years.

3.8 Location of outdoor recreation visits

Those who had made a visit to the outdoors in the 4 weeks prior to interview were also asked to specify the location of their visits from one of three options, shown in Figure 13, below:

- The countryside, including inland villages
- A town or city
- The seaside, a resort or the coast.

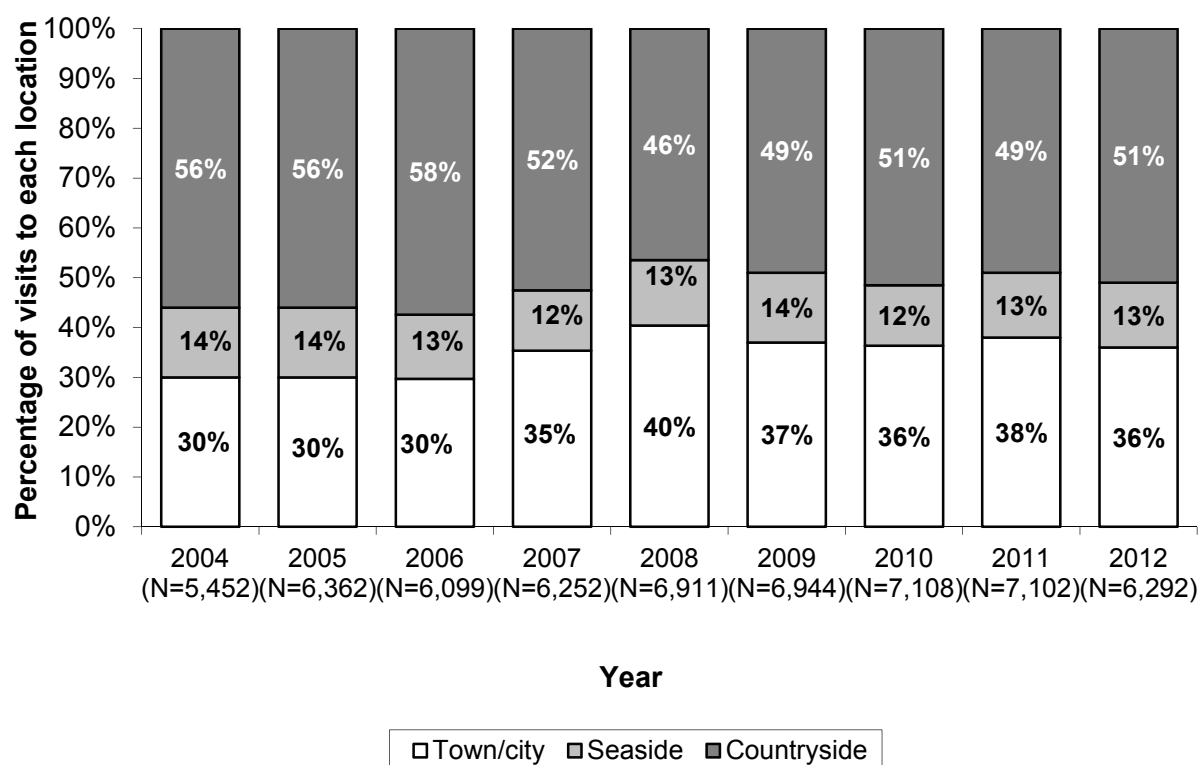


Figure 13. Location of outdoor recreation visits 2004 to 2012

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

Note: Percentages may not equal 100% due to rounding and the exclusion of 'don't know' responses from the chart

Over the past four years, around half of all visits have been taken to countryside locations (51% in 2012). The proportion of visits to town and city destinations has remained at a reasonably consistent level since 2008 (in the range 36% - 40%). While there was a slight decrease in the proportion of visits to urban locations between 2011 and 2012 (down from 38% to 36%), visits to these types of destinations have risen overall since 2004 when 30% of visits were taken in towns and cities.

Compared to the overall average, visits were more likely to have been to a destination in the countryside when fishing or walks of more than 2 miles were the main activities undertaken (75% and 56% of these visits respectively were to the countryside). Those living in rural areas (70%), those on a visit of 3 hours or more in duration (60%) and those with car access (55%) were also more likely than the average to have most recently visited a countryside destination. Those living outside the 10% most deprived areas in Scotland were also more likely than those living in these areas to have visited the countryside (52% and 38% respectively).

The destination of visits was more likely to have been a place in a town or city when the main activity undertaken was a family outing (44%) or a walk of less than 2 miles (44%). Visits to this type of destination were also more likely than the average to be taken by those with no car access (55%), those living in urban areas (50%), those aged 34 and under (49%) and those in the DE social grades (46%). Those living in the 10% most deprived areas in Scotland were more likely than other members of the population to visit an urban location (49% and 35% respectively).

Seaside locations were more likely to have been included on visits taken by those who visit the outdoors relatively infrequently, i.e. less than once a month (23%) and by those on a visit of 3 hours or more in duration (16%).

Table 11. Specific locations visited on outdoor recreation visits by location type
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Countryside % | Urban % | Seaside % |
|--------------------------|--------------------------|--------------------|----------------------|
| Local park or open space | 28 | 67 | 17 |
| Woodland/forest area | 36 | 6 | 6 |
| Farmland | 15 | 2 | 2 |
| Mountain/moorland areas | 17 | 2 | 7 |
| Rivers and canals | 11 | 5 | 6 |
| Villages | 9 | 7 | 7 |
| Lochs | 7 | 1 | 2 |
| Town | 1 | 6 | * |
| Beaches/cliffs | 6 | 4 | 75 |
| The sea/sea lochs | 5 | 3 | 26 |
| Wildlife area | 6 | 3 | 10 |
| Other | 2 | 4 | 1 |
| <i>Base</i> | 3,117 | 2,187 | 983 |

Note: Up to 3 mentions possible per respondent so sum of percentages may be over 100%

Table 11 (above) shows the specific types of destination for visits to the countryside, urban and seaside areas in 2012. Urban visits were most likely to have been to a local park or open space (67%), while 36% of countryside visits were to a woodland or forest area. As may be expected, the specific locations most likely to be visited in seaside locations were beaches or cliffs (75%) and the sea or sea lochs (26%).

Respondents were asked to indicate, in more detail, the single, main destination of their most recent visit to the outdoors, details of which are presented in Table 12 (below). As in previous years, a park or open space was the most frequently visited main destination in 2012 (36%), a figure which has remained relatively consistent since 2005. The proportion of visits to woodland or forest areas rose in 2012 to 15%, the highest level recorded since 2007.

Table 12. Main destination of outdoor recreation visits by type of place
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % | % |
| Park/open space | 27 | 37 | 37 | 37 | 37 | 35 | 36 | 36 | 36 |
| Total Woodland/forest | 13 | 13 | 17 | 16 | 11 | 10 | 13 | 13 | 15 |
| - Woodland/forest – other/don't know owner | 5 | 6 | 9 | 9 | 6 | 7 | 9 | 8 | 9 |
| - Woodland/forest – managed by Forestry Commission/Forest Enterprise | 8 | 7 | 8 | 7 | 5 | 4 | 5 | 5 | 7 |
| Beach/cliff | 11 | 10 | 9 | 8 | 10 | 11 | 10 | 11 | 11 |
| Farmland | 6 | 6 | 7 | 4 | 4 | 6 | 6 | 7 | 6 |
| Mountain/hill/ moorland | 7 | 7 | 5 | 4 | 5 | 5 | 6 | 5 | 6 |
| River/canal | 4 | 6 | 7 | 8 | 5 | 6 | 5 | 5 | 5 |
| Village | 10 | 5 | 5 | 5 | 7 | 6 | 6 | 4 | 5 |
| Towns | - | 3 | 2 | 4 | 7 | 7 | 3 | 3 | 3 |
| Sea/Sea Loch | 5 | 3 | 3 | 3 | 2 | 3 | 3 | 2 | 3 |
| Loch | 4 | 3 | 3 | 2 | 2 | 3 | 3 | 3 | 2 |
| Wildlife area | 2 | 2 | 2 | 2 | 2 | 2 | 3 | 2 | 1 |
| Base | 5,452 | 6,362 | 6,099 | 6,252 | 6,911 | 6,944 | 7,108 | 7,102 | 6,292 |

Note: - = No response

Percentages may not equal 100% due to rounding and the exclusion of 'don't know' responses from table

Visits where a park or open space was the main destination in 2012 were more likely where the main activity was a family outing, a walk of less than 2 miles or running/ jogging (52%, 44% and 41% respectively). Parks and open spaces were also more likely to be the main destination of visits taken by those living in the 10% most deprived areas in Scotland (49% of visits), those living in urban areas (46%), those with no access to a car (46%), those aged 34 and under (45%), those in the DE social grades (44%), those with children in the household (40%) and those on visits lasting less than 3 hours in duration (39%).

Woodland or forest areas were more likely to be the main destination of an outdoor visit amongst those visiting the outdoors more than once a day (23%), on visits where a walk of more than 2 miles was the main activity undertaken (22%) and by those living in rural areas (21%). Those with access to a car were more likely than those with no car access to have visited a woodland/ forest (17% and 7% respectively), as were those living outside the 10% most deprived areas in Scotland (16%) compared to those living in these areas (10%).

Beaches and cliffs were more likely to be the main destination for those whose main activity was a family outing and on visits taken by those in part-time paid employment (17% each).

Table 13. Main destination of outdoor recreation visits by type of place – by quarter
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Jan-March 2012 survey wave % | April-June 2012 survey wave % | July-Sept 2012 survey wave % | Oct-Dec 2012 survey wave % |
|--|---|--|---|---|
| Park/open space | 34 | 34 | 37 | 38 |
| Total Woodland/forest | 16 | 15 | 15 | 15 |
| - Woodland/forest – other/don't know owner | 9 | 7 | 8 | 8 |
| - Woodland/forest – managed by Forestry Commission/Forest Enterprise | 7 | 8 | 6 | 7 |
| Beach/cliff | 13 | 9 | 12 | 9 |
| Village | 4 | 5 | 5 | 6 |
| Farmland | 5 | 7 | 5 | 5 |
| River/canal | 5 | 7 | 3 | 7 |
| Mountain/hill/moorland | 4 | 3 | 3 | 5 |
| Towns | 4 | 3 | 2 | 2 |
| Sea/Sea Loch | 3 | 3 | 4 | 2 |
| Loch | 3 | 2 | 2 | 2 |
| Wildlife area | 2 | 1 | 2 | 1 |
| Base | 1,527 | 1,627 | 1,755 | 1,383 |

As shown in Table 13 above, there were few significant variations in locations visited by quarter, with the exception being visits to beaches/ cliffs which were more likely to be taken by those interviewed between January and March (13%) and July to September (12%). It is worth bearing in mind that respondents were asked about visits in the 4 weeks prior to being interviewed and therefore, visits taken by those interviewed in January will also cover the Christmas and New Year holiday period.

While Tables 12 and 13 present the single main destination of outdoor recreation visits (i.e. the place most time was spent at), it is recognised that some trips include time spent at more than one type of location. Table 14 below presents results relating to all of the locations included in trips.

Table 14. All locations visited on outdoor recreation visits by type of place
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 % | Total 2005 % | Total 2006 % | Total 2007 % | Total 2008 % | Total 2009 % | Total 2010 % | Total 2011 % | Total 2012 % |
|---|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Park/open space | 32 | 42 | 43 | 44 | 46 | 43 | 42 | 40 | 41 |
| Total woodland/forest | 29 | 21 | 23 | 21 | 16 | 16 | 18 | 18 | 21 |
| -Woodland/forest – other/don't know owner | 18 | 12 | 13 | 14 | 10 | 12 | 12 | 13 | 12 |
| -Woodland/forest – managed by Forestry Commission/ Forest Enterprise | 12 | 10 | 11 | 9 | 7 | 5 | 6 | 6 | 9 |
| Beach/cliff | 17 | 14 | 14 | 12 | 15 | 14 | 14 | 14 | 14 |
| Farmland | 14 | 11 | 11 | 7 | 8 | 9 | 9 | 9 | 8 |
| River/canal | 9 | 10 | 10 | 11 | 10 | 10 | 8 | 8 | 8 |
| Mountain/hill/moorland | 11 | 9 | 9 | 8 | 8 | 9 | 8 | 8 | 10 |
| Village | 16 | 9 | 9 | 8 | 10 | 10 | 9 | 7 | 8 |
| Wildlife area | 5 | 5 | 4 | 6 | 7 | 6 | 7 | 5 | 5 |
| Loch | 7 | 6 | 6 | 4 | 4 | 5 | 5 | 5 | 4 |
| Sea/Sea Loch | 11 | 8 | 7 | 5 | 6 | 5 | 5 | 4 | 7 |
| Towns | 2 | 3 | 2 | 4 | 7 | 8 | 3 | 3 | 3 |
| <i>Base</i> | <i>5,452</i> | <i>6,362</i> | <i>6,099</i> | <i>6,252</i> | <i>6,911</i> | <i>6,944</i> | <i>7,108</i> | <i>7,102</i> | <i>6,292</i> |

Note: more than one answer was possible so the sum of percentages may be over 100%

Over the years, the appeal of parks and open spaces has been evident. These locations have been the most likely to have been visited in each survey year with the 2012 figure of 41% similar to the figures recorded in the previous three years. Around a fifth of visits in 2012 included a woodland/ forest (21%), an increase from 2011 (18%) that has been influenced by an increase in visits to Forestry Commission woodland (6% in 2011 to 9% in 2012).

Table 15. All locations visited on outdoor recreation visits by type of place – by quarter
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Jan-March 2012 survey wave % | April-June 2012 survey wave % | July-Sept 2012 survey wave % | Oct-Dec 2012 survey wave % |
|---|---|--|---|---|
| Park/open space | 38 | 38 | 44 | 43 |
| Total woodland/forest | 22 | 19 | 21 | 21 |
| <i>-Woodland/forest – other/don't know owner</i> | 14 | 11 | 13 | 12 |
| <i>-Woodland/forest – managed by Forestry Commission/ Forest Enterprise</i> | 8 | 8 | 10 | 10 |
| Beach/cliff | 15 | 13 | 16 | 12 |
| Farmland | 9 | 10 | 8 | 7 |
| River/canal | 8 | 8 | 7 | 9 |
| Mountain/hill/moorland | 9 | 9 | 9 | 13 |
| Village | 6 | 8 | 9 | 9 |
| Wildlife area | 6 | 4 | 7 | 4 |
| Loch | 4 | 4 | 4 | 4 |
| Sea/Sea Loch | 6 | 6 | 8 | 8 |
| Towns | 4 | 3 | 2 | 2 |
| <i>Base</i> | 1,527 | 1,627 | 1,755 | 1,383 |

When analysed by quarter, there were few significant variations in the types of destination recorded with the exception of a higher proportion of respondents interviewed between October and December having visited mountains, hills and moorland on a visit taken in the previous 4 weeks (13%).

Estimates of the volume of visits by quarter to each type of destination are presented in Table 16 based on *all* visits, not only those regarded as the main destination.

As with all of the results presented in this report, these estimates are subject to some variation. For example, while Table 16 provides an estimate of around 121 million visits taken to parks and open spaces in 2011, it is estimated that the actual volume of visits taken is likely to be between 113 million and 130 million.

Table 16. Estimated volume of visits to different types of destination (millions of visits)¹⁵

| | Jan-Mar 2012 survey wave | Apr-Jun 2012 survey wave | Jul-Sep 2012 survey wave | Oct-Dec 2012 survey wave | Total 2012 |
|---|-----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|-----------------------|
| Park/open space | 27.3m | 27.5m | 34.3m | 32.2m | 121.4m |
| Total woodland/forest | 16.0m | 13.6m | 16.8m | 15.6m | 61.9m |
| - Woodland/forest – other/don't know owner | 10.3m | 7.8m | 9.7m | 9.0m | 36.8m |
| - Woodland/forest – managed by Forestry Commission/ Forest Enterprise | 6.0m | 6.1m | 7.5m | 7.4m | 27.0m |
| Beach/cliff | 11.0m | 9.2m | 12.6m | 9.0m | 41.8m |
| Farmland | 6.4m | 7.1m | 6.0m | 5.5m | 25.0m |
| Village | 4.4m | 5.4m | 7.3m | 7.0m | 24.2m |
| Mountain/hill/moorland | 6.7m | 6.3m | 6.8m | 9.7m | 29.4m |
| River/canal | 5.6m | 6.2m | 5.4m | 7.1m | 24.3m |
| Wildlife area | 4.6m | 3.0m | 5.8m | 2.8m | 16.1m |
| Loch | 2.9m | 3.1m | 3.0m | 2.9m | 11.9m |
| Sea/Sea Loch | 4.5m | 4.6m | 6.3m | 5.7m | 21.1m |
| Total visits | 71.1m | 72.4m | 78.6m | 74.7m | 296.8m |

Note: The 'Total woodland/forest' figures refer to single visits where at least one woodland/forest location was visited. They do not equal the sum of the sub-categories shown below this row as both of these locations may have been visited on a single visit. Quarterly estimates may not equal Total 2012 due to rounding.

Table 17 (overleaf) shows the estimated number of visits to destinations between 2006 and 2012. Estimates are not provided for 2004 or 2005 as these results are not comparable to later results due to a change in the survey questionnaire. Location profile results for 2004 and 2005 are, however, presented in Tables 18 and 19: once a respondent was admitted into the main survey by indicating that they had participated in outdoor recreation, their response regarding the location of most recent visit was less likely to be affected by the questionnaire change. More details regarding the questionnaire change are provided in Annex 4.

¹⁵ The use of an amended, more accurate approach to producing visit estimates based on unrounded percentages was introduced in 2010.

Table 17. Annual estimated volume of visits to different types of destination¹⁶

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 ¹⁷ | Total 2012 |
|--|---------------|---------------|---------------|---------------|---------------|-----------------------------|---------------|
| Park/open space | 133.0m | 141.1m | 177.2m | 151.3m | 148.0m | 146.4m | 121.4m |
| Beach/cliff | 51.0m | 46.8m | 56.5m | 50.9m | 47.8m | 50.3m | 41.8m |
| Woodland/forest – other/don't know owner | 40.3m | 38.5m | 39.3m | 40.3m | 43.7m | 45.7m | 36.8m |
| Mountain/hill/moorland | 35.7m | 30.7m | 30.0m | 30.9m | 29.7m | 29.8m | 29.4m |
| Woodland/forest – managed by Forestry Commission/ Forest Enterprise | 33.3m | 27.3m | 25.0m | 18.1m | 21.4m | 22.0m | 27.0m |
| Farmland | 25.9m | 20.8m | 30.9m | 30.9m | 31.7m | 33.8m | 25.0m |
| River/canal | 32.1m | 33.9m | 37.3m | 34.1m | 28.8m | 28.9m | 24.3m |
| Village | 27.1m | 26.8m | 39.7m | 33.6m | 30.6m | 24.4m | 24.2m |
| Sea/Sea Loch | 27.6m | 19.6m | 21.9m | 18.5m | 19.2m | 15.5m | 21.1m |
| Wildlife area | 19.2m | 22.2m | 25.2m | 20.3m | 23.2m | 17.2m | 16.1m |
| Loch | 28.4m | 21.9m | 16.6m | 16.4m | 17.0m | 17.2m | 11.9m |

3.9 Path use and waymarking

Respondents were also asked whether they had used a path or network of paths during their most recent visit to the outdoors. As shown in Table 18 below, 77% of visits taken in 2012 involved the use of a path or network of paths, the highest proportion since 2004. Just over half of visits in 2012 involved the use of a waymarked or signposted path or network of paths (55%).

Table 18. Use of paths and waymarking during outdoor recreation visits

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | % | % | % | % | % | % | % | % | % |
| Used any path or network of paths | 66 | 73 | 70 | 74 | 76 | 74 | 71 | 76 | 77 |
| Used path or network of paths with waymarks or signposting | 49 | 44 | 43 | 49 | 53 | 54 | 53 | 56 | 55 |
| Did not use path or network of paths | 34 | 27 | 29 | 25 | 24 | 26 | 28 | 24 | 23 |
| Base | 534 | 2,680 | 2,013 | 2,169 | 2,284 | 2,436 | 2,370 | 2,542 | 2,038 |

Note: Percentages may not equal 100% due to rounding and the exclusion of 'don't know' responses from table

¹⁶ A more accurate approach to producing visit estimates based on unrounded percentages means that the 2006-2009 figures in the chart above vary slightly from those shown in previous reports.

¹⁷ Please note that the 2011 estimates have been revised and differ from those published in previous reports.

A path or path network was more likely to have been used on visits of under 3 hours in duration than on longer visits (78% and 72% respectively) and by women (81%) compared to men (73%). Those visiting countryside destinations were also more likely than the average to have used a path or path network (84%).

3.10 Details of visit

Over the years, the majority of visits to the outdoors have been taken directly from home rather than from a location away from home, such as a holiday base. Since 2007 this proportion has consistently remained at 95%.

Trips more likely to be taken directly from home in 2012 included: those taken to or within towns or cities (99%), visits where a walk of less than 2 miles was the main activity (98%), trips taken by those visiting the outdoors at least once per day (98%) and visits of less than 3 hours in duration (98%).

As illustrated in Table 19 below, in 2012 walking remained the dominant means of transport used to reach the destination on outdoor visits, with around two-thirds of visits involving travel on foot (64%); a car was used by 30% of respondents to reach the destination of their most recent visit.

Table 19. Main type of transport used to reach destination of outdoor recreation visits
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|-----------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % | % |
| On foot | 50 | 55 | 60 | 61 | 64 | 65 | 63 | 67 | 64 |
| Car/van/minibus | 43 | 39 | 33 | 31 | 29 | 30 | 29 | 28 | 30 |
| Bicycle | 3 | 3 | 3 | 3 | 3 | 2 | 5 | 3 | 3 |
| Public bus | 1 | 2 | 2 | 3 | 2 | 1 | 2 | 1 | 2 |
| <i>Base</i> | 1,873 | 2,231 | 2,182 | 1,915 | 2,328 | 2,273 | 2,364 | 2,279 | 2,039 |

Note: * Less than 0.5%;
Percentages may not equal 100% due to rounding and the exclusion of 'don't know' responses from table

Further analysis reveals some variations by respondent and visit type. Walking was more likely to be the main mode of transport used on visits where a walk of under 2 miles was the main activity (87%), among those with no access to a car (82%) as well as on visits taken by those visiting the outdoors at least once a day (77%), those on a visit of less than 3 hours in duration (76%), those in the DE social grades (75%), those with no Internet access (74%) and those visiting urban destinations (73%).

Conversely, visits more likely to involve travel by car to the destination included those where sightseeing/visiting attractions or a family outing were the main activities undertaken (79% and 59% of these visits respectively), trips of more than 3 hours in duration (72%), trips taken by those visiting the outdoors only occasionally, i.e. once every 2-3 months (67%), visits to the seaside (39%) and visits taken by those with a car in their household (36%).

In 2012, just over two-fifths of visits involved a journey of less than 2 miles (44%), while around three in ten were taken between 2 and 5 miles from their starting point (30%). This continues the trend, apparent since 2004, of travelling shorter distances for outdoor recreation visits. As shown in Table 20 (overleaf), 74% of visits were taken within 5 miles of their starting point in 2012, with a mean distance travelled to and from the destination of 9 miles (equal to that recorded in 2011).

Table 20. Distance travelled to and from destination during outdoor recreation visits
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|-----------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % | % |
| <2 miles (< 3.2 km) | 30 | 33 | 36 | 38 | 39 | 41 | 41 | 44 | 44 |
| 2 - 5 miles (3.2 - 8 km) | 30 | 31 | 32 | 29 | 34 | 32 | 30 | 31 | 30 |
| 5.1 - 10 miles (8.1 - 16.1km) | 12 | 11 | 13 | 12 | 10 | 9 | 12 | 9 | 10 |
| 10.1 – 20 miles (16.2 – 32.2 km) | 7 | 10 | 6 | 8 | 5 | 6 | 5 | 5 | 4 |
| 20.1 – 40 miles (32.3 – 64.4 km) | 7 | 5 | 5 | 6 | 4 | 5 | 5 | 3 | 5 |
| 40.1 – 60 miles (64.5 – 96.5 km) | 4 | 4 | 2 | 2 | 2 | 2 | 4 | 2 | 2 |
| 60.1 – 80 miles (96.6 - 128.7 km) | 4 | 2 | 2 | 1 | 2 | 1 | 2 | 1 | 1 |
| >80 miles (>128.7 km) | 1 | 6 | 4 | 3 | 3 | 3 | 4 | 3 | 3 |
| Don't know | 1 | * | * | 1 | 1 | 1 | * | 1 | 1 |
| <i>Mean distance – miles ~</i> | 16 miles | 15 miles | 12 miles | 11 miles | 9 miles | 10 miles | 11 miles | 9 miles | 9 miles |
| <i>Mean distance – km ~</i> | 26 km | 24 km | 19 km | 18 km | 15 km | 16 km | 18 km | 15km | 15km |
| Base | 1,873 | 2,231 | 2,182 | 1,915 | 2,328 | 2,273 | 2,364 | 2,279 | 2,039 |

~ Mean distances are based upon mid points of each distance range e.g. 3.5 miles is used for 2 to 5 miles range. When respondents stated that they travelled over 80 miles a value of 100 miles has been used.

* = less than 0.5%

In 2012, the shortest mean distance travelled, in terms of location, was for visits taken in urban areas (6 miles compared to 12 for seaside and 11 for countryside destinations). When analysed by quarter, the highest mean travel distance of 12 miles was recorded during the July to September period, compared to 8 miles between January and March, 10 miles between April and June and 7 miles between October and December.

As illustrated in Table 21 (below), during 2012, around four-fifths of visits were less than 3 hours in duration (81%), with around a quarter of visits lasting less than 1 hour (27%). These figures are similar to those recorded in the previous three years. Overall, the average visit duration has fallen over the years, with an average of 2 hours and 11 minutes recorded in 2012.

Table 21. Duration of outdoor recreation visits, including travel time

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|----------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|------------------------------|
| | % | % | % | % | % | % | % | % | % |
| Less than 1 hour | 20 | 23 | 24 | 27 | 28 | 27 | 25 | 25 | 27 |
| 1 up to 2 hours | 32 | 33 | 37 | 40 | 37 | 38 | 38 | 40 | 39 |
| 2 up to 3 hours | 14 | 15 | 14 | 13 | 13 | 13 | 14 | 14 | 15 |
| 3 up to 4 hours | 9 | 9 | 9 | 7 | 7 | 7 | 8 | 7 | 7 |
| 4 up to 5 hours | 7 | 6 | 6 | 5 | 5 | 5 | 5 | 5 | 4 |
| 5 up to 8 hours | 8 | 7 | 5 | 5 | 5 | 4 | 4 | 5 | 3 |
| 8 hours or more | 9 | 6 | 5 | 4 | 4 | 5 | 6 | 4 | 4 |
| <i>Mean duration (hours)</i> | 2 hrs 30 mins | 2 hrs 12 mins | 2 hrs 26 mins | 2 hrs 16 mins | 2 hrs 17 mins | 2 hrs 20 mins | 2 hrs 24 mins | 2 hrs 19 mins | 2 hrs 11 mins |
| <i>Base</i> | 5,452 | 6,362 | 6,099 | 6,252 | 6,911 | 6,944 | 7,108 | 7,102 | 6,292 |

~ Mean durations are based upon mid points of each duration period e.g. 3.5 hours is used for 3 to 4 hours range. When respondents stated that their visit was over 8 hours a value of 8 has been used. Percentages may not equal 100% due to rounding and the exclusion of 'don't know' responses from table.

Thirty six percent of town and city visits lasted less than 1 hour in duration compared with 27% of visits overall. Other visits more likely to be less than an hour in duration were those where a walk of less than 2 miles was the main activity undertaken (56%), those taken by respondents with a long-term illness or disability (46%), those taken by respondents aged 55 and over (32%), those taken by respondents who visit the outdoors at least once per day (35%), and those taken by respondents interviewed between October and December (34%).

Ten percent of seaside visits and 9% of countryside visits lasted for 5 hours or more (compared with 3% of visits to urban locations). Visits where the main activity was fishing (57% lasted 5 hours or more), hillwalking (42%), sightseeing/visiting attractions (45%) or walks of more than 8 miles (38%) were also more likely than the average to last 5 hours or more in duration. Likewise, those visiting the outdoors relatively infrequently, i.e. less than once a month (22%) were more likely than the average to take visits of this length.

As Table 22 illustrates, 98% of visits in 2012 were 'repeat visits' to places that respondents had previously visited and 76% were to locations they visited once a week or more frequently. Only a small proportion of respondents were visiting a location for the first time ever (2%).

Table 22. Frequency with which respondents go to place visited

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % |
| At least once a day | 29 | 34 | 31 | 31 | 30 | 30 | 31 |
| Several times a week | 31 | 29 | 38 | 37 | 31 | 37 | 36 |
| Once a week | 11 | 10 | 9 | 8 | 11 | 10 | 9 |
| Once or twice a month | 6 | 10 | 7 | 9 | 12 | 8 | 10 |
| Once every 2-3 months | 6 | 5 | 5 | 6 | 5 | 5 | 6 |
| Less often | 1 | 6 | 5 | 5 | 6 | 5 | 4 |
| First visit ever | 3 | 4 | 3 | 2 | 3 | 3 | 2 |
| Base | 2,182 | 1,915 | 2,328 | 2,273 | 2,364 | 2,279 | 2,039 |

Note: Percentages may not equal 100% due to rounding and the exclusion of 'don't know' responses from table

Visits more likely to have been taken to the same place at least once a week included those where the main activity undertaken was walking for less than 2 miles (90%), where the visit was less than 3 hours in duration (85%) and when the visit was taken by those in the DE social grades (83%). In contrast, 'first time' visits were more likely to be taken by respondents who were sightseeing or visiting attractions as their main activity (19%), by those who visit the outdoors just once or twice a month (10%) and by those on visits of 3 hours or more (8%).

The regularity of visits to the same place in urban areas and the finding that most outdoor recreation visits are taken close to home are likely to be a reflection of the fact that the majority of the Scottish population live in areas defined as urban (68%).¹⁸

3.11 Areas visited in Scotland

Table 23 (overleaf) provides a ranking of Scotland's Local Authorities as destinations for outdoor trips, from the most visited in 2012 – Fife (11% of all visits), the Highlands (7%) and City of Edinburgh (6%) – to those visited less frequently. Table 23 also shows the percentage of the Scottish population resident in each Local Authority area. This comparison highlights the fact that some areas obtain a higher percentage of visits than their population share, for example, Fife (11% of visits, 7% of population), the Scottish Borders (4% of visits, 2% of population) and Argyll & Bute (4% of visits, 2% of population).

In contrast, some Local Authority areas have a higher percentage of the Scottish population than their share of outdoor trips. This is most evident in the case of the Glasgow area (5% of visits, 12% of population), North Lanarkshire (3% of visits, 6% of population) and South Lanarkshire (4% of visits, 6% of population).

¹⁸ As defined by Scottish Government.

Table 23. Main destination of outdoor recreation visits by Local Authority

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 | Scottish population resident in area % |
|--------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|---|
| | % | % | % | % | % | % | % | |
| Fife | 7 | 10 | 12 | 13 | 10 | 11 | 11 | 7 |
| Highland | 5 | 8 | 8 | 7 | 6 | 6 | 7 | 4 |
| City of Edinburgh | 6 | 5 | 6 | 8 | 8 | 8 | 6 | 9 |
| Aberdeenshire | 7 | 9 | 6 | 6 | 6 | 6 | 5 | 4 |
| Glasgow | 7 | 5 | 6 | 7 | 7 | 6 | 5 | 12 |
| Dumfries and Galloway | 4 | 5 | 5 | 4 | 6 | 5 | 5 | 3 |
| Argyll & Bute | 5 | 5 | 1 | 2 | 3 | 5 | 4 | 2 |
| Scottish Borders | 3 | 3 | 5 | 6 | 5 | 4 | 4 | 2 |
| Aberdeen | 2 | 3 | 3 | 3 | 2 | 3 | 4 | 4 |
| South Lanarkshire | 3 | 1 | 1 | 3 | 3 | 3 | 4 | 6 |
| Moray | 5 | 1 | 3 | 5 | 3 | 2 | 4 | 2 |
| Stirling | 2 | 3 | 1 | 2 | 3 | 2 | 4 | 2 |
| North Lanarkshire | 2 | 3 | 1 | 2 | 3 | 4 | 3 | 6 |
| South Ayrshire | 3 | 3 | 3 | 3 | 3 | 4 | 3 | 2 |
| Angus | 4 | 3 | 4 | 2 | 2 | 3 | 3 | 2 |
| Perth & Kinross | 5 | 4 | 2 | 3 | 4 | 3 | 3 | 3 |
| North Ayrshire | 2 | 2 | 2 | 3 | 2 | 2 | 3 | 3 |
| Western Isles | * | 1 | 1 | 2 | 2 | 2 | 3 | 1 |
| Falkirk | 1 | 2 | 3 | 1 | 2 | 4 | 2 | 3 |
| East Lothian | 4 | 1 | 2 | 3 | 4 | 3 | 2 | 2 |
| Renfrewshire | * | 1 | 1 | 1 | 2 | 3 | 2 | 3 |
| Dundee | 2 | 2 | 2 | 1 | 2 | 2 | 2 | 3 |
| West Lothian | 2 | 2 | 1 | 2 | 2 | 2 | 2 | 3 |
| Clackmannanshire | 1 | 1 | 1 | * | * | * | 2 | 1 |
| East Ayrshire | 3 | 2 | 3 | 3 | 1 | 2 | 1 | 2 |
| Inverclyde | 2 | 2 | * | 1 | 2 | 2 | 1 | 2 |
| Midlothian | * | 1 | 1 | 1 | 1 | 1 | 1 | 2 |
| West Dunbartonshire | 3 | 6 | 7 | 3 | 2 | * | 1 | 2 |
| East Renfrewshire | * | 1 | * | 1 | * | 1 | * | 2 |
| East Dunbartonshire | 3 | 6 | 8 | 5 | 2 | * | * | 2 |
| Orkney & Shetland# | * | * | * | - | * | * | - | 1 |

Notes: '*' means a figure less than 0.5% but not zero; '-' = no responses;
#Orkney & Shetland are reported together due to small sample sizes.

Table 24 provides an estimate of the annual number of trips taken in each Local Authority area. This estimate is an annual average based upon the full nine years of data collection from January 2004 to December 2012. These figures are more precise than using a single year estimate because of the larger samples of respondents reporting visits to each area, providing results with a smaller statistical margin of error. However, caution should be taken when using these estimates due to the change in the questionnaire in September 2005 and

the sample size and seasonal distribution of interviews in a number of the Local Authority areas (see Annexes 4 and 5 for details).

Table 24. Main destination of outdoor recreation visits by Local Authority – estimates of total volume of visits

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Estimated annual volume of visits taken to each Local Authority area 2004 – 2012 (million visits) |
|-----------------------|---|
| Fife | 31.8 |
| Highland | 21.8 |
| City of Edinburgh | 21.1 |
| Glasgow | 20.3 |
| Aberdeenshire | 19.8 |
| Dumfries and Galloway | 16.3 |
| Perth & Kinross | 13.9 |
| Argyll & Bute | 13.9 |
| Scottish Borders | 13.2 |
| South Ayrshire | 11.6 |
| East Dunbartonshire | 9.8 |
| Angus | 9.8 |
| Stirling | 9.7 |
| West Dunbartonshire | 9.4 |
| Aberdeen | 9.3 |
| Moray | 9.1 |
| North Lanarkshire | 9.0 |
| South Lanarkshire | 8.6 |
| East Lothian | 8.4 |
| North Ayrshire | 8.2 |
| Falkirk | 7.5 |
| East Ayrshire | 7.0 |
| West Lothian | 6.5 |
| Dundee | 6.1 |
| Renfrewshire | 5.1 |
| Western Isles | 4.4 |
| Inverclyde | 4.2 |
| Midlothian | 3.8 |
| Clackmannanshire | 2.7 |
| East Renfrewshire | 1.7 |
| Orkney & Shetland# | 1.3 |

Notes: Estimated annual volume of visits taken in each area are presented as the average of the eight-year period, to decrease standard error.

#Orkney & Shetland are reported together due to small sample sizes.

Figure 14 illustrates the variations in average annual outdoor recreation visits. Areas where the largest numbers of visits are taken are shown in blue.

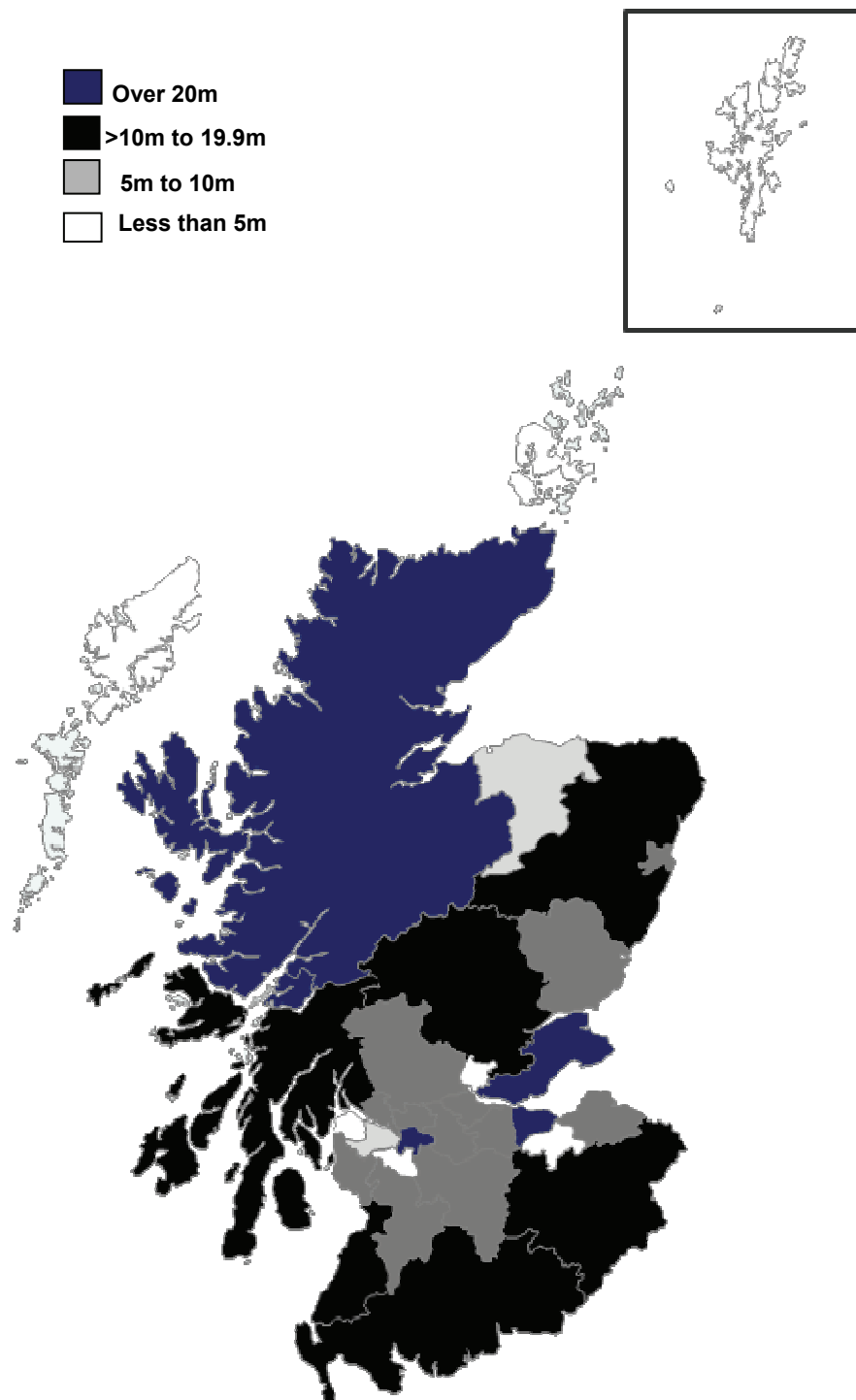


Figure 14. Main destination on outdoor recreation visits by local authority – estimates of annual volume of visits

Figure 15 below shows the percentage of outdoor visits taken by residents of 18 of Scotland's 32 Local Authority areas to destinations within the same area. These estimates are produced only every third year by aggregating data for a separate three year period; the estimates shown in Figure 15 do not, therefore, include 2012 data. Aggregating the data in

this way provides a larger sample size of residents in each Local Authority area and increases the accuracy of the results. At this stage results are not available for the remaining 14 Local Authorities as the cumulative sample sizes in these areas are not large enough and/or there is an uneven seasonal distribution of interviews achieved. Further details regarding the distribution of interviewing and the presentation of results at a Local Authority level are provided in Annex 5.

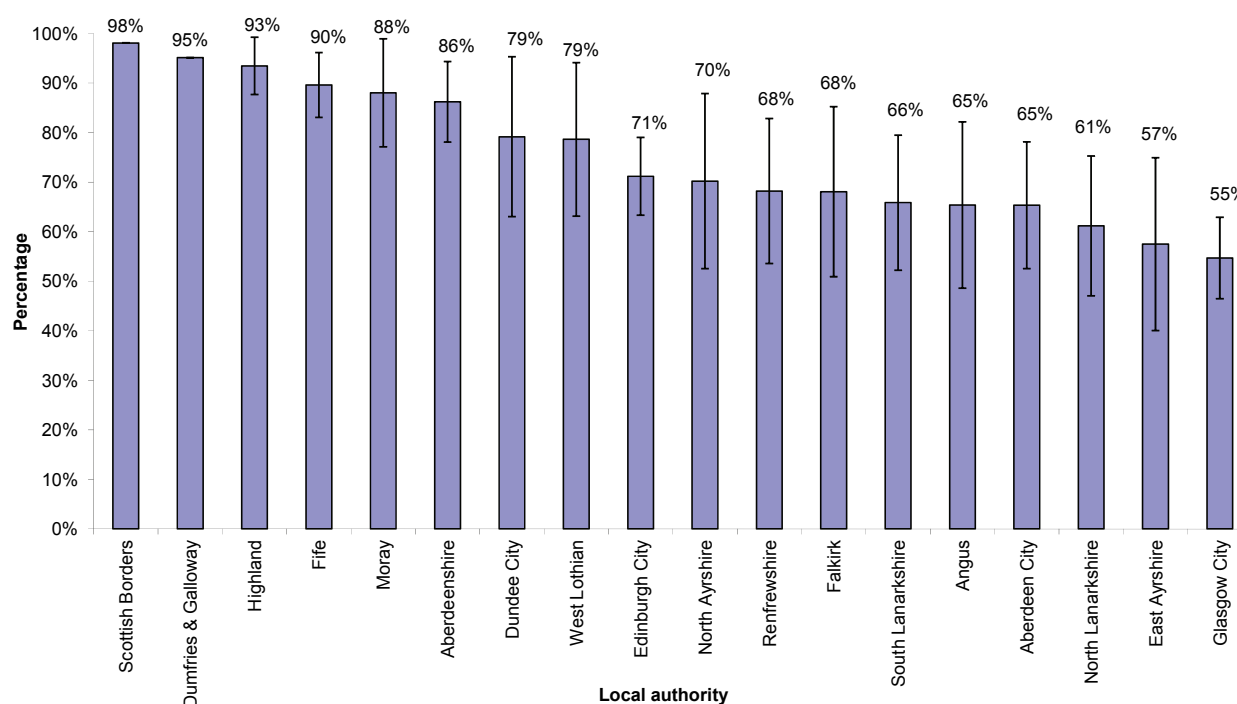


Figure 15. Percentage of visits taken by residents of each Local Authority that were within their 'home' area

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

Note: Error bars are included to provide an indication of the accuracy of each estimate.

The areas are ordered from those where nearly all of the visits taken by residents of the Local Authority area were taken within the same area (98% in Scottish Borders, 95% in Dumfries & Galloway) to those where larger percentages of the visits taken by residents were to places in another Local Authority area. Most notably, it is estimated that over half of the visits taken by residents of Glasgow were taken to other areas (55%).

Visits to destinations in National Parks and within the CSGN area

In the analysis of the 2012 survey data, responses were also classified to allow us to make estimates of the proportion of visits taken to each of Scotland's National Parks and to destinations within the Central Scotland Green Network area (CSGN). These estimates used information recorded on the (nearest) city, town or village to the main place visited.

It is therefore estimated that in 2012:

- 7% of visits to the outdoors had a destination in a National Park – 5% within the Loch Lomond and Trossachs National Park and 2% within the Cairngorms National Park.
- 51% of visits had a destination within the CSGN area.

3.12 Party composition during outdoor recreation visits

As can be seen from Table 25, in 2012, 47% of respondents visited the outdoors on their own, while around four in ten respondents took a visit to the outdoors with family members (38%) and 14% with friends. The proportion of respondents visiting alone in 2012 was the same as in the previous survey year, with this figure the highest recorded since 2004. This is likely to correspond with the increase in shorter visits being taken closer to home.

Table 25. Party composition during outdoor recreation visits

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|-------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % | % |
| Alone | 41 | 41 | 40 | 45 | 41 | 46 | 45 | 47 | 47 |
| With family members | 43 | 41 | 43 | 40 | 43 | 40 | 41 | 39 | 38 |
| With friends | 17 | 18 | 16 | 15 | 15 | 14 | 15 | 14 | 14 |
| With an organised group | 3 | 3 | 2 | 2 | 3 | 2 | 2 | 2 | 2 |
| <i>Base</i> | 5,452 | 5,213 | 2,958 | 3,090 | 3,429 | 3,551 | 3,486 | 3,559 | 3,221 |

Note: Respondents could give more than one answer, therefore the sum of percentages may be over 100%

Visits were more likely to have been undertaken alone by those who visited the outdoors more than once per day (74%), where the main activity was a walk of less than 2 miles (65%), by those aged 55 and over (60%), by those with a long-term illness or disability (57%), by those with no car in the household (57%), by those without children at home (57%), where the visit lasted for less than 3 hours (54%) and by men (53%). The incidence of 'solo' visits was also higher among those interviewed in January to March (52%) and October to December (55%).

Visits more likely to have been taken with family members included those taken once a week (63%) or once/ twice a month (65%), those taken by respondents with children in the household (62%), those lasting 3 hours or more (50%), those taken by respondents interviewed in the main summer holiday period between July and September (45%) and those taken by respondents aged 54 and under (44%). Visits were also more likely to be reported to have been taken with family where sightseeing/visiting attractions was the main activity undertaken (54%).

Visits more likely to have been taken with friends included those taken by respondents visiting the outdoors relatively infrequently, i.e. less than once a month (34%), those on visits lasting 3 hours or more in duration (30%), those taken by respondents aged 16 to 34 (20%) and those taken by respondents interviewed between April and June (19%).

In 2012, children were included in the party on 24% of all visits and on 45% of visits taken with others. Women (52%) were much more likely than men (35%) to have visited the outdoors with children in their party.

Across all visits in 2012, the average total party size was 2.6. The largest average party sizes were for visits where sightseeing or visiting an attraction was the main activity (these visits had an average party size of 5.3), those lasting 3 hours or more (average 4.4), those

where a family outing was the main activity (average 4.5), visits taken by those who visited once or twice a month (average 4.1), visits taken by those with children in the household (average 3.4) and visits taken by those aged under 35 (average 3.0).

Conversely, the average party size was lower for those on a visit of less than 3 hours in duration (average 2.1), those with an illness or disability (average 2.1), those interviewed between October and December (average 2.0), those aged 55 and over (average 2.0), those walking for less than 2 miles (average 1.7) and those visiting the outdoors more than once a day (1.5).

As shown in Table 26, below, a dog was taken on 45% of visits to the outdoors in 2012, a slight but not significant difference from the 2011 figure of 48%.

Table 26. Percentage of outdoor recreation visits accompanied by a dog
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|--------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % | % |
| Did take a dog | 41 | 41 | 41 | 45 | 41 | 40 | 43 | 48 | 45 |
| Did not take a dog | 59 | 59 | 59 | 55 | 59 | 60 | 57 | 52 | 55 |
| <i>Base</i> | 5,452 | 5,213 | 2,958 | 3,090 | 3,429 | 3,551 | 3,486 | 3,559 | 3,221 |

Visits in 2012 more likely than the average to have included a dog were those taken by respondents who visit the outdoors more than once a day (83%), visits where a walk of up to 8 miles was the main activity (57%) and those lasting less than 3 hours in duration (52%). Other variations in the presence of a dog on the visit included:

- A higher proportion of those living in rural areas (50%) compared to those living in urban areas (42%);
- A higher proportion of those aged 35 and over (49%) compared to those aged 16 to 34 (38%);
- A higher proportion of women (49%) compared to men (41%);
- A higher proportion of those with access to a car (48%) compared to those with no car access (37%);
- A higher proportion of those without children in the household (48%) compared to those with children in the household (41%).

3.13 Expenditure on visit

Survey participants were presented with a list of items and asked if they had spent anything on each of these items during their most recent visit to the outdoors. Table 27 shows the percentage of visits involving expenditure on each of the categories listed, with food/drink and fuel being the two main areas of expenditure.

Three in ten visits in 2012 involved some form of expenditure (30%), a figure which is higher than in 2011 (23%) but lower, overall, than the 2004 figure of 37%. An overall decrease in distances travelled and increase in the proportion of visitors walking to their destination over the years also means that the proportion of visits involving expenditure on fuel has fallen from 16% in 2004 to 8% in 2012.

Table 27. Percentage of visits on which respondent had spent any money on selected expenditure categories

Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % | % |
| Food & drink | 29 | 26 | 25 | 22 | 26 | 23 | 20 | 17 | 23 |
| Fuel | 16 | 9 | 8 | 6 | 7 | 6 | 6 | 7 | 8 |
| Gifts/souvenirs | 4 | 5 | 4 | 3 | 3 | 3 | 2 | 2 | 3 |
| Public transport fares | 2 | 2 | 2 | 3 | 2 | 1 | 1 | 1 | 2 |
| Car parking | 3 | 2 | 3 | 2 | 2 | 2 | 2 | 1 | 2 |
| Maps/leaflets | 1 | 1 | 1 | 1 | * | * | 1 | 1 | 1 |
| Hire of equipment | 1 | 1 | 1 | 1 | * | * | * | * | 1 |
| Purchase of equipment | 1 | 1 | 1 | 1 | * | 1 | * | * | 1 |
| Others | 4 | 4 | 3 | 3 | 3 | 3 | 3 | 2 | 1 |
| Any money spent | 37 | 31 | 30 | 28 | 32 | 28 | 25 | 23 | 30 |
| No money spent at all | 63 | 69 | 70 | 72 | 68 | 72 | 75 | 77 | 70 |
| <i>Base</i> | 1,873 | 2,231 | 2,182 | 1,915 | 2,328 | 2,273 | 2,364 | 2,279 | 2,039 |

* = less than 0.5 %

Note: Respondents could select as many categories as applicable.

Average (mean) expenditure in total and on food and drink, fuel and gifts and souvenirs is shown in Table 28.

Table 28. Expenditure during outdoor recreation visits - mean spend by category amongst those who spent anything on that category

Base: Respondents who spent any money on that category during most recent visit to the outdoors

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 | <i>Bases 2012</i> |
|-------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | (£) | (£) | (£) | (£) | (£) | (£) | (£) | |
| Fuel | 21 | 20 | 22 | 57 | 23 | 26 | 26 | 288 |
| Gifts & souvenirs | 25 | 22 | 30 | 28 | 23 | 28 | 29 | 112 |
| Food & drink | 19 | 23 | 16 | 16 | 20 | 23 | 19 | 722 |
| TOTAL | 30 | 33 | 24 | 33 | 27 | 34 | 31 | 2,039 |

The total average expenditure amongst those spending anything in 2012 was £31, a slight decrease on the 2011 figure of £34 and similar to the level recorded in 2006 (£30). The average expenditure on fuel, gifts and souvenirs remained similar between 2011 and 2012, with a decrease recorded on average spend on food and drink (£23 in 2011 to £19 in 2012).

Taking into account the 70% of visits which involved no expenditure, the average total spend per visit in 2012 was £9, a slight increase on the 2011 average of £8.

This information on average spend per visit, including those with no expenditure, is used to produce an overall estimate of expenditure during visits to the outdoors in Scotland. As highlighted previously in this report, an estimated 297 million outdoor recreation visits were taken in Scotland during 2012. As the average spend on each of these trips was £9, total expenditure during all trips can be estimated at around £2.6 billion.¹⁹

Table 29. Estimated expenditure during outdoor recreation visits 2006 to 2012 (billions of pounds)

| | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|--------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | (£) | (£) | (£) | (£) | (£) | (£) | (£) |
| TOTAL | 2.9 | 3.1 | 2.8 | 3.2 | 2.3 | 2.7 | 2.6 |

3.14 Outdoor access legislation and the Scottish Outdoor Access Code

The Land Reform (Scotland) Act 2003 and the Scottish Outdoor Access Code (the Code) came into effect in Scotland on 9 February 2005. This legislation established a statutory right of responsible access to most land and inland waters for outdoor recreation, crossing land and also some educational and commercial purposes.

SNH has a duty under the legislation to prepare, issue and to publicise the Code, supported by a wider education programme. Over time, SNH is required to review the effectiveness of the Code in delivering responsible behaviour by those taking and managing access.

Prior to the launch of the Code, a series of questions were included in the Scottish Recreation Survey to measure attitudes towards visiting different types of land and awareness of the forthcoming legislation and Code. Following the launch, questions continued to be included periodically to track awareness of the legislation and Code and its impact on behaviour in the outdoors. This section of the report presents the results of the questions included from 2005 to 2012 and where applicable, from 2004.

For all nine survey years, respondents were asked if they had heard of the Scottish Outdoor Access Code. As shown in Figure 16, 39% of respondents in 2012 were aware of the Code, the lowest proportion recorded since 2004. A quarter of respondents stated that they were 'definitely aware' of the Code in 2012 (25%), the lowest figure recorded since 2005. It is likely that awareness levels reflect to some extent the weight and type of promotional activity undertaken in each year, with peak awareness achieved when the Scottish Outdoor Access Code was being promoted on television.

Please note that from September 2009, this question was asked bi-annually rather than on a quarterly basis.

¹⁹ Taking account of margins of error, at the 95% confidence level the estimated total value of visits ranges from £2.5 to £2.8 billion in 2012, from £2.6 to £2.9 billion in 2011, £2.2 to £2.5 billion in 2010, from £3.0 to £3.4 billion in 2009, from £2.6 to £3.0 billion in 2008, from £2.9 to £3.3 billion in 2007 and from £2.7 to £3.1 billion in 2006.

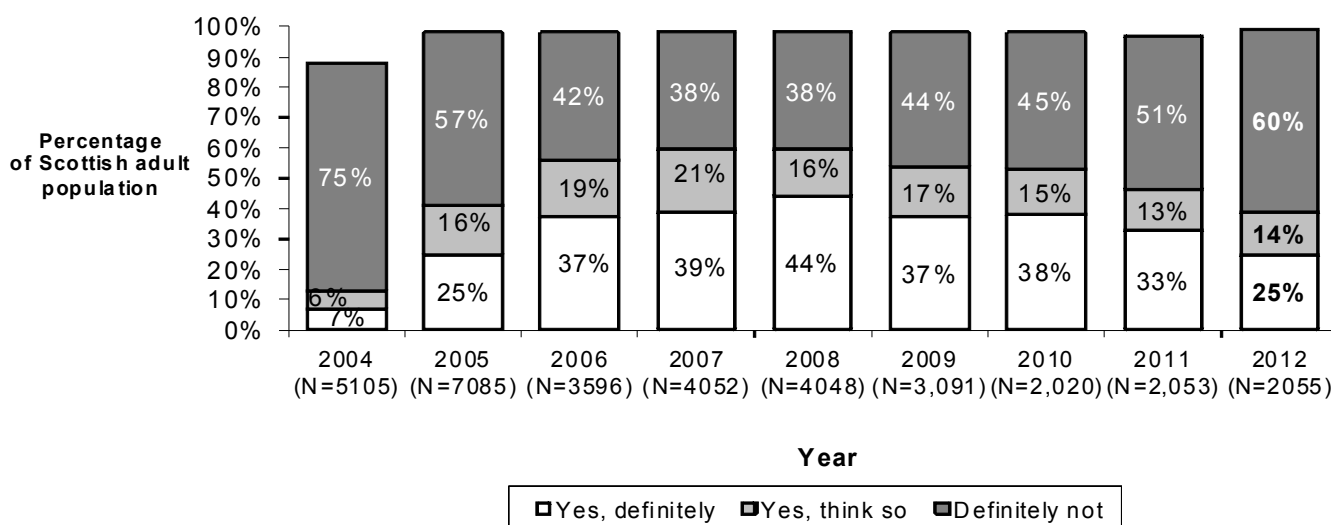


Figure 16. Percentage of Scottish adult population aware of Scottish Outdoor Access Code 2004 to 2012

Base: All respondents

Note: 'Don't know' responses have been excluded, therefore, percentages may not equal 100%.

Awareness of the Code was higher ('definitely' or 'think so') amongst those who visited countryside locations (58%), those visiting the outdoors at least once a day (54%), those on a visit lasting 3 hours or more (53%), those living in rural areas (50%) and those taking part in any walking as their main activity (49%).

Those who claimed to have heard of the Scottish Outdoor Access Code were asked to indicate spontaneously what they thought it asked people who were accessing the outdoors for recreation to do and what responsibilities it placed on landowners and managers. Answers were subsequently categorised into a number of pre-coded responses. These results are shown in Tables 30 and 31.

Table 30. Opinions on what the Code asks people to do
Base: Respondents who have heard of the Code

| | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % |
| Care for the environment | 51 | 58 | 57 | 62 | 60 | 60 | 55 | 59 |
| Take responsibility for your own actions | 48 | 54 | 55 | 59 | 58 | 58 | 53 | 58 |
| Respect the interests of other people | 51 | 53 | 53 | 60 | 60 | 50 | 45 | 53 |
| Keep your dog under proper control | 21 | 23 | 19 | 27 | 27 | 25 | 26 | 38 |
| Respect people's privacy and peace of mind | 19 | 20 | 21 | 27 | 28 | 19 | 18 | 24 |
| Help land managers and others to work safely and effectively | 11 | 12 | 11 | 17 | 17 | 9 | 9 | 18 |
| Take extra care when organising an event or running a business | 7 | 8 | 7 | 12 | 10 | 6 | 4 | 10 |
| Don't know | 9 | 8 | 9 | 6 | 7 | 9 | 12 | 10 |
| <i>Base</i> | 2,364 | 1,961 | 2,382 | 2,410 | 1,665 | 1,063 | 929 | 811 |

Note: Respondents could give more than one answer, therefore the sum of percentages may be over 100%

As Table 30 illustrates, 59% of those aware of the Code thought that it asked people to 'care for the environment' while a similar percentage stated that it encouraged people to 'take responsibility for your own actions' (58%). Just over half of those aware of the Code believed it asked people to 'respect the interests of other people' (53%), while 38% thought it asked people to 'keep your dog under proper control' and 24% to 'respect people's privacy and peace of mind'. One in ten did not know what the Code asked people to do (10%).

Between 2009 and 2011, there were a number of significant decreases in the proportions mentioning a number of the messages in Table 30. However, between 2011 and 2012, increases were recorded in the proportions mentioning all of the messages, particularly 'respect the interests of other people' (45% in 2011 to 53% in 2012) and 'keep your dog under proper control' (26% in 2011 to 38% in 2012).

Table 31 outlines the spontaneous opinions of respondents on what the Code asks farmers and land managers to do. Answers were subsequently categorised into a number of pre-coded responses.

Table 31. Opinions on what the Code asks farmers and land managers to do
Base: Respondents who have heard of the Code

| | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total2011 | Total2012 |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|------------------|------------------|
| | % | % | % | % | % | % | % | % |
| Respect access rights in managing land or water | 36 | 40 | 37 | 40 | 39 | 34 | 36 | 37 |
| Respect the interests of other people | 29 | 28 | 24 | 28 | 26 | 21 | 21 | 24 |
| Take account of access rights when managing contiguous land or water | 15 | 13 | 9 | 13 | 13 | 12 | 11 | 19 |
| Care for your environment | 13 | 17 | 14 | 17 | 18 | 14 | 14 | 16 |
| Take responsibility for your own actions | 9 | 14 | 11 | 14 | 14 | 12 | 10 | 15 |
| Ask reasonably when asking people to avoid land management operations | 11 | 14 | 10 | 14 | 11 | 9 | 7 | 11 |
| Work with your Local Authority and other bodies to help integrate access and land management | 7 | 10 | 9 | 10 | 8 | 7 | 6 | 7 |
| Don't know | 29 | 28 | 34 | 28 | 33 | 41 | 41 | 36 |
| <i>Base</i> | 2,364 | 2,410 | 2,382 | 2,410 | 1,665 | 1,063 | 929 | 811 |

Note: Respondents could give more than one answer, therefore the sum of percentages may be over 100%

The most frequently provided responses in 2012 were that the Code encourages farmers and land managers to 'respect access rights when managing land or water' (mentioned by 37% of respondents) and 'to respect the interests of other people' (24%). Over the years, responses regarding the requirements for farmers and land managers have generally been less variable than for other people. However, in 2012, significant increases were recorded in the proportions mentioning responsibilities relating to contiguous land or water (11% in 2011 to 19% in 2012) and/or taking care over their own actions (10% in 2011 to 15% in 2012).

3.15 Problems with access during outdoor recreation visits

Table 32 below shows the proportion of visits where respondents experienced an issue with access and the reasons for these difficulties.

Table 32. Problems with access encountered during outdoor recreation visits
Base: Respondents who had made visits to the outdoors in the 4 weeks prior to interview

| | Total 2004 | Total 2005 | Total 2006 | Total 2007 | Total 2008 | Total 2009 | Total 2010 | Total 2011 | Total 2012 |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| | % | % | % | % | % | % | % | % | % |
| Overgrown path | 5 | 5 | 8 | 7 | 7 | 7 | 6 | 4 | 6 |
| Blocked path | 2 | 3 | 3 | 3 | 4 | 4 | 3 | 3 | 4 |
| A restrictive sign e.g. Private, No Entry | 5 | 5 | 4 | 4 | 5 | 5 | 3 | 2 | 2 |
| An aggressive or intimidating animal, such as a dog | 3 | 2 | 2 | 3 | 2 | 3 | 3 | 2 | 2 |
| A temporary restrictive sign e.g. Forest Operations | 3 | 2 | 3 | 4 | 2 | 2 | 1 | 1 | 2 |
| Blocked or restricted car parking | 2 | 1 | 1 | 2 | 2 | 2 | 1 | 1 | 2 |
| A locked gate across path/ route | 6 | 3 | 4 | 4 | 4 | 4 | 3 | 4 | 1 |
| A man made obstruction or blockage on water | 1 | 1 | 2 | 2 | 2 | 2 | 1 | 1 | 1 |
| Lack of advice or information offering an alternative route if original was blocked | 1 | 1 | 2 | 1 | 1 | 2 | 1 | 1 | 1 |
| Any problems | 29 | 18 | 25 | 20 | 22 | 20 | 19 | 16 | 17 |
| No problems | 71 | 82 | 75 | 80 | 78 | 80 | 81 | 84 | 83 |
| Base | 2,242 | 2,238 | 1,904 | 2,168 | 2,299 | 2,235 | 2,133 | 2,281 | 2,215 |

Note: * Less than 0.5%;
 Respondents could give more than one answer, therefore the sum of percentages may be over 100%

As Table 32 illustrates, access problems were encountered on 17% of visits in 2012, one of the lowest proportions recorded since the survey began. These figures are encouraging, suggesting that the majority of respondents in each survey year do not encounter any access problems when visiting the outdoors. The most commonly encountered problems in 2012 were similar to previous years: overgrown paths (encountered on 6% of visits) and blocked paths (4%).

On 12% of visits taken in 2012, the participant had encountered someone whom they perceived to be behaving inappropriately. Amongst this group, the main issues were as follows:

- Dropping litter – 3%;
- Dog not under control – 3%;
- Misusing alcohol or drugs – 1%;
- Fly tipping - 1%;
- Dog fouling - 1%;
- Lack of courtesy – 1%.

4. REFERENCES

Costley, T (TNS), 2008. Scottish Recreation Survey: Calibration Exercise. *Scottish Natural Heritage Commissioned Report No. 296*

ANNEX 1: SOCIAL GRADE DEFINITIONS (BASED ON CHIEF INCOME EARNER IN HOUSEHOLD)

- A**
 - Scotland: 6% of the population;
 - These are professional people, or are very senior in business or commerce, or are top civil servants
 - Retired people, previously grade A. Widows/widowers of people previously grade A.
- B**
 - Scotland: 18% of the population;
 - Middle management executives in large organisations, with appropriate qualifications
 - Principle officers in local government and civil service
 - Top management or owners of small business concerns, educational and service establishments
 - Retired people, previously grade B. Widows/widowers of people previously grade B.
- C1**
 - Scotland: 21% of the population;
 - Junior management; owners of small establishments; and all others in non-manual positions
 - Jobs in this group have very varied responsibilities and educational needs
 - Retired people, previously grade C1. Widows/widowers of people previously grade C1.
- C2**
 - Scotland: 24% of the population;
 - All skilled manual workers and those manual workers with responsibility for other people
 - Retired people previously grade C2, with a pension from their job
 - Widows/widowers, if receiving pensions from their late husband's/wife's job.
- D**
 - Scotland: 16% of the population;
 - All semi skilled and unskilled manual workers, and apprentices and trainees to skilled workers
 - Retired people, previously grade D, with a pension from their job
 - Widows/widowers, if receiving a pension from their late husband's/wife's job.
- E**
 - Scotland: 13% of the population;
 - All those entirely dependent on the state long term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding 6 months (otherwise classified on previous occupation)
 - Casual workers and those without a regular income
 - Only households without a chief income earner are coded in this group

ANNEX 2: QUESTIONNAIRE TIMETABLE

The Scottish Recreation Survey comprises a core set of questions asked in every month of the survey and other question sets asked every other month or less often. In 2012 the questionnaire was split into five parts, details of which are outlined below:

SET A

- 1 How often visited the outdoors in Scotland in the last 12 months
- 3 Number of visits in the last 4 weeks
- 3b Check for respondents stating more than 56 visits (more than 2 per day)
- 4 Main activity on last visit
- 6 Type of place visited on last trip – town/city, countryside or seaside
- 7 Detailed type of place visited on last trip – woodland/forest etc
- 8 If more than one detailed place at 7, the one visited for the longest time
- 14 Duration of visit

SET Aa

- 17 Party composition
- 18 Number of adults in party
- 19 Number of children in party
- 20 Whether accompanied by a dog

SET B

- 5 Participation in other activities, in addition to main activity
- 9 Use of paths/ networks of paths
- 10 Use of waymarking on paths
- 11 Whether last visit was from home or whilst on holiday away from home
- 15 Local Authority area visited

SET C

- 2 Reasons for not making any visits to the outdoors
- 12 Means of transport
- 13 Distance travelled on visit
- 16 Frequency of visits to destination
- 21-31 Expenditure
- 46 Long-term illness disability (monthly from November 2010, previously quarterly)

SET D(a)

- 37 Problems encountered on outdoor visits
- 38 Need, if any, to change route and reasons
- 39 Experience of other people behaving irresponsibly in the outdoors.

SET D(b)

- 33 Awareness of Scottish Outdoors Access Code (SOAC)
- 35 What the SOAC asks of visitors to the outdoors
- 36 What the SOAC asks of land managers and farmers

ANNEX 2 (continued)

The following timetable demonstrates the frequency with which each question set was asked during the period of the survey (shaded boxes represent the inclusion of each set in a survey wave).

| SET | January 2012 | February 2012 | March 2012 | April 2012 | May 2012 | June 2012 | July 2012 | August 2012 | September 2012 | October 2012 | November 2012 | December 2012 |
|-------|--------------|---------------|------------|------------|----------|-----------|-----------|-------------|----------------|--------------|---------------|---------------|
| A | | | | | | | | | | | | |
| Aa | | | | | | | | | | | | |
| B | | | | | | | | | | | | |
| C | | | | | | | | | | | | |
| D (a) | | | | | | | | | | | | |
| D(b) | | | | | | | | | | | | |

ANNEX 3: FULL QUESTIONNAIRE

Question 1

Firstly, how often, on average, have you taken visits to the outdoors for leisure and recreation in Scotland in the last 12 months? These leisure trips could either have been from home or while you were away from home on holiday, provided the holiday was in Scotland. By outdoors, we mean open spaces in the countryside as well as in towns and cities such as woodland, parks, farmland, paths, beaches etc.

- 1 ☐ More than once per day
- 2 ☐ Every day
- 3 ☐ Several times a week
- 4 ☐ Once a week
- 5 ☐ Once or twice a month
- 6 ☐ Once every 2-3 months
- 7 ☐ Once or twice
- 8 ☐ Never

Question 2

Why have you not made any visits to the outdoors in Scotland for the purpose of outdoor recreation in the last 12 months? DO NOT PROMPT- CODE FULLY

- 1 ☐ Too busy
- 2 ☐ Bad/poor weather
- 3 ☐ Old age
- 4 ☐ Poor health
- 5 ☐ Pregnant
- 6 ☐ Have young children
- 7 ☐ Not interested at all
- 8 ☐ No access to a car
- 9 ☐ Worried about safety
- 10 ☐ Lack of suitable paths
- 11 ☐ Lack of suitable places to go
- 12 ☐ Don't know where to go
- 13 ☐ Don't like going on my own
- 14 ☐ No local clubs/associations to join and go with
- 15 ☐ Other
- 16 ☐ No particular reason

Question 3

How many visits to the outdoors for leisure and recreation in Scotland have you made in the last 4 weeks?

(You may have made more than one visit to the outdoors for leisure and recreation each day.)

ANNEX 3 (continued)

Question 3b

You stated that you have taken [number of visits at Q3] visits during the last four weeks. As this is more than an average of two visits per day, can I check that this is correct?

- 1 ☐ Yes
- 2 ☐ No (return to Q3a)

Question 4

Thinking about your last visit to the outdoors for leisure and recreation, which of the activities listed on the screen would you consider to have been your MAIN activity during that visit?

- 1 ☐ Walking - less than 2 miles
- 2 ☐ Walking 2-8 miles
- 3 ☐ Walking - more than 8 miles
- 4 ☐ Hill walking\mountaineering
- 5 ☐ Cycling - on public roads
- 6 ☐ Cycling - on paths and tracks
- 7 ☐ Cycling - not on paths and tracks or roads
- 8 ☐ Mountainbiking
- 9 ☐ Horse riding
- 10 ☐ Fishing
- 11 ☐ Watersports, including canoeing, windsurfing, rowing & sailing
- 12 ☐ Ski-ing - on piste
- 13 ☐ Ski-ing - off piste
- 14 ☐ Swimming in the sea, rivers, lochs
- 15 ☐ Birdwatching
- 16 ☐ Other wildlife\nature watching
- 17 ☐ Running\jogging
- 18 ☐ Wildcamping
- 19 ☐ Sightseeing\ visiting attractions
- 20 ☐ Picnicking
- 21 ☐ Family outing
- 22 ☐ Other

ANNEX 3 (continued)

Question 5

During this visit did you participate in any OTHER activities listed on the screen?

- 1 ☐ Walking - less than 2 miles
- 2 ☐ Walking 2-8 miles
- 3 ☐ Walking - more than 8 miles
- 4 ☐ Hill walking\mountaineering
- 5 ☐ Cycling - on public roads
- 6 ☐ Cycling - on paths and tracks
- 7 ☐ Cycling - not on paths and tracks or roads
- 8 ☐ Mountainbiking
- 9 ☐ Horse riding
- 10 ☐ Fishing
- 11 ☐ Watersports, including canoeing, windsurfing, rowing & sailing
- 12 ☐ Ski-ing - on piste
- 13 ☐ Ski-ing - off piste
- 14 ☐ Swimming in the sea, rivers, lochs
- 15 ☐ Birdwatching
- 16 ☐ Other wildlife\nature watching
- 17 ☐ Running\jogging
- 18 ☐ Wildcamping
- 19 ☐ Sightseeing\ visiting attractions
- 20 ☐ Picnicking
- 21 ☐ Family outing
- 22 ☐ Other
- 23 ☐ No\none

Question 6

Thinking about your last visit to the outdoors for leisure and recreation, which of the places on the screen, best describes where you went?

- 1 ☐ A town or city
- 2 ☐ The countryside (including inland villages)
- 3 ☐ The seaside (a resort or the coast)

ANNEX 3 (continued)

Question 7

On this last visit to the outdoors for leisure and recreation, what types of location or destination did you go to? CODE UP TO 3 MENTIONS

- 1 ☐ Woodland\forest - managed by Forestry Commission\Forest Enterprise
- 2 ☐ Woodland\forest - other type of owner
- 3 ☐ Woodland\forest - don't know owner
- 4 ☐ Farmland - fields with crops
- 5 ☐ Farmland - fields with livestock
- 6 ☐ Farmland - mixed crops and livestock
- 7 ☐ Mountain\hill
- 8 ☐ Moorland
- 9 ☐ Village
- 10 ☐ Loch
- 11 ☐ Sea\Sea loch
- 12 ☐ River
- 13 ☐ Canal
- 14 ☐ Beach
- 15 ☐ Cliff
- 16 ☐ Local Park or open space
- 17 ☐ Wildlife area
- 18 ☐ Other

Question 8

Which of these was the main destination or location you visited? IF RESPONDENT IS UNSURE, SELECT ONE VISITED FOR THE LONGEST TIME

- 1 ☐ Woodland\forest - managed by Forestry Commission\Forest Enterprise
- 2 ☐ Woodland\forest - other type of owner
- 3 ☐ Woodland\forest - don't know owner
- 4 ☐ Farmland - fields with crops
- 5 ☐ Farmland - fields with livestock
- 6 ☐ Farmland - mixed crops and livestock
- 7 ☐ Mountain\hill
- 8 ☐ Moorland
- 9 ☐ Village
- 10 ☐ Loch
- 11 ☐ Sea\Sea loch
- 12 ☐ River
- 13 ☐ Canal
- 14 ☐ Beach
- 15 ☐ Cliff
- 16 ☐ Local Park or open space
- 17 ☐ Wildlife area
- 18 ☐ Other

ANNEX 3 *(continued)*

Question 9

On this last visit to the outdoors for leisure and recreation, did you use a path or network of paths?

- 1 ☐ Yes
- 2 ☐ No

Question 10

Did this path or network of paths have signposts or waymarking or not?

- 1 ☐ Yes
- 2 ☐ No

Question 11

Was this last visit while you were staying away from home or did you start and finish the trip at your home?

- 1 ☐ At Home
- 2 ☐ Staying away from home

Question 12

What was the main means of transport used on this last visit? That is, the one used to get to the main destination of the visit.

- 1 ☐ On foot
- 2 ☐ Car\van\minibus
- 3 ☐ Motorcycle\scooter
- 4 ☐ Public bus
- 5 ☐ Private coach
- 6 ☐ Train
- 7 ☐ Horseback
- 8 ☐ Bicycle
- 9 ☐ Boat
- 10 ☐ Other

ANNEX 3 (continued)

Question 13

In total, how far did you travel to get to and from the main destination of this visit?

- 1 ☐ Less than 2 miles
- 2 ☐ 2-5 miles
- 3 ☐ 6-10 miles
- 4 ☐ 11-20 miles
- 5 ☐ 21-30 miles
- 6 ☐ 31-40 miles
- 7 ☐ 41-50 miles
- 8 ☐ 51-60 miles
- 9 ☐ 61-80 miles
- 10 ☐ 81-100 miles
- 11 ☐ More than 100 miles

Question 14

In total, how long was the visit, in terms of time - that is the total time spent including travelling time to and from the destination?

- 1 ☐ Less than 1 hour
- 2 ☐ 1 - up to 2 hours
- 3 ☐ 2 - up to 3 hours
- 4 ☐ 3 - up to 4 hours
- 5 ☐ 4 - up to 5 hours
- 6 ☐ 5 - up to 8 hours
- 7 ☐ 8 hours or more

Question 15

And could you tell me the name of the place you visited during your last visit to the outdoors for leisure and recreation? If you visited more than one place, tell us your main destination.

Question 16

Was this your first visit to this destination or location?

IF NO: How many times have you visited this destination or location in the last 12 months?

- 1 ☐ First visit ever
- 2 ☐ More than once per day
- 3 ☐ Every day
- 4 ☐ Several times a week
- 5 ☐ Once a week
- 6 ☐ Once or twice a month
- 7 ☐ Once every 2-3 months
- 8 ☐ Once or twice
- 9 ☐ Not sure\don't know
- 10 ☐ Not been in last 12 months

ANNEX 3 (continued)

Question 17

On this last visit, were you...

- 1 ☐ On your own\alone
- 2 ☐ With other members of your family
- 3 ☐ With friends
- 4 ☐ With an organised group
- 5 ☐ Other

Question 18

How many adults aged 16 or over, including yourself, were on this visit?

Question 19

How many children aged under 16 were on this visit?

Question 20

Were you accompanied by a dog on this visit?

- 1 ☐ Yes
- 2 ☐ No

Question 21

On this last visit, did you personally spend any money on any of the items listed on the screen?

- 1 ☐ Food and drink
- 2 ☐ Petrol\diesel\LPG
- 3 ☐ Car parking
- 4 ☐ Bus\train\ferry fares
- 5 ☐ Hire of equipment
- 6 ☐ Purchase of equipment
- 7 ☐ Maps\guidebooks\leaflets
- 8 ☐ Gifts\souvenirs
- 9 ☐ Other items
- 10 ☐ Didn't spend any money

Question 22

How much did you spend on Food and Drink?

Please include anything you may have spent on behalf of others in your party.

Question 23

How much did you spend on Petrol/Diesel/LPG?

Please include anything you may have spent on behalf of others in your party.

ANNEX 3 *(continued)*

Question 24

How much did you spend on Car parking?

Please include anything you may have spent on behalf of others in your party.

Question 25

How much did you spend on Bus/train/ferry fares?

Please include anything you may have spent on behalf of others in your party.

Question 26

How much did you spend on Hire of equipment?

Please include anything you may have spent on behalf of others in your party.

Question 27

How much did you spend on Purchase of equipment?

Please include anything you may have spent on behalf of others in your party.

Question 28

How much did you spend on Maps/guidebooks/leaflets?

Please include anything you may have spent on behalf of others in your party.

Question 29

How much did you spend on Gifts/souvenirs?

Please include anything you may have spent on behalf of others in your party.

Question 30

How much did you spend on [any other spending]?

Please include anything you may have spent on behalf of others in your party.

Question 31

The total amount is around £ [answer depending on routing].

Is this correct?

1 ☐ Yes

2 ☐ No (check amounts again if no)

ANNEX 3 *(continued)*

Question 33

Have you heard of the Scottish Outdoor Access Code?

- 1 ☐ Yes, definitely
- 2 ☐ Yes, think so
- 3 ☐ Definitely not

Question 33c

Have you seen a copy of...?

- 1 ☐ The Code
- 2 ☐ The Summary Leaflet
- 3 ☐ Neither
- 4 ☐ Don't know

Question 35

Can you tell me what the Scottish Outdoor Access Code asks people who are visiting the countryside to do?

- 1 ☐ Respect the interests of other people
- 2 ☐ Care for the environment
- 3 ☐ Take responsibility for your own actions
- 4 ☐ Respect people's privacy and peace of mind
- 5 ☐ Help land managers and others to work safely and effectively
- 6 ☐ Keep your dog under proper control
- 7 ☐ Take extra care when organising an event or running a business

Question 36

Can you tell me what the Scottish Outdoor Access Code asks farmers and land managers to do?

- 1 ☐ Respect the interests of other people
- 2 ☐ Care for your environment
- 3 ☐ Take responsibility for your own actions
- 4 ☐ Respect access rights in managing land or water
- 5 ☐ Ask reasonably when asking people to avoid land management operations
- 6 ☐ Work with your Local Authority and other bodies to help integrate access and land management
- 7 ☐ Take account of access rights if you manage contiguous land or water

ANNEX 3 (continued)

Question 37

Coming back to your last visit to the outdoors for leisure and recreation...

Which of the problems listed on the screen did you encounter or experience, if any?

- 1 ☐ A locked gate across path\route
- 2 ☐ Overgrown path
- 3 ☐ Blocked path
- 4 ☐ A man-made obstruction or blockage on water
- 5 ☐ Blocked or restricted car parking
- 6 ☐ An aggressive or intimidating animal, such as a dog
- 7 ☐ Barbed wire or an electric fence across a path
- 8 ☐ A restrictive sign - for example 'Private', 'No Entry', 'Keep Out'
- 9 ☐ A temporary restrictive sign - for example - 'Warning - Forest Operations. Please obey all signs and directions'
- 10 ☐ A sign which banned your particular activity on that day
- 11 ☐ An intimidating sign
- 12 ☐ Lack of advice or information offering an alternative if original route was blocked or closed
- 13 ☐ Other

Question 38

On your last visit, did you have to alter your route significantly for any reason?
IF YES: Why did you have to alter your route significantly?

- 1 ☐ No, did not alter route
- 2 ☐ I was politely asked to alter my route by a farmer or other person
- 3 ☐ I was rudely asked to alter my route by a farmer or other person
- 4 ☐ I came across a No Entry sign
- 5 ☐ I came across an information sign which gave reasons for and the directions for an alternative route
- 6 ☐ I reached a field with livestock
- 7 ☐ I reached a field with crops growing
- 8 ☐ I reached a field where machinery was being used - ploughing, spraying etc
- 9 ☐ I reached an area where trees were being felled
- 10 ☐ I had to pass close by a house and/or garden
- 11 ☐ I reached a farmyard
- 12 ☐ I came across people fishing\angling
- 13 ☐ The route was becoming overused or eroded
- 14 ☐ The route was obstructed - by a fence, locked gate etc
- 15 ☐ The route was becoming overgrown, difficult to access
- 16 ☐ Weather
- 17 ☐ Ran out of time
- 18 ☐ Tired
- 19 ☐ Other

ANNEX 3 (continued)

Question 39

During your last visit, did you come across any other recreational users who were behaving irresponsibly or illegally?

IF YES: In what way(s) were they behaving irresponsibly or illegally?

- 1 ☐ No, did not encounter any other recreational users behaving irresponsibly or illegally
- 2 ☐ Car was parked blocking a gate or entrance
- 3 ☐ Crossing a field of growing crops and causing damage
- 4 ☐ Cycling where they should not have been
- 5 ☐ Dropping litter
- 6 ☐ Dog not under control
- 7 ☐ Disturbing livestock
- 8 ☐ Causing damage or disturbance to wild animals\birds\plants
- 9 ☐ Disturbing other people's enjoyment of the countryside and open spaces
- 10 ☐ Fly tipping
- 11 ☐ Horseriding where they should not have been
- 12 ☐ Ignoring reasonable advice from a farmer or land manager or ranger
- 13 ☐ Interfering with farm\forest machinery
- 14 ☐ Interfering with operation such as ploughing, tree felling etc
- 16 ☐ Mis-using alcohol or drugs
- 17 ☐ Poaching
- 18 ☐ Taking part in watersports without considering others
- 19 ☐ Not got adequate equipment for their activity\weather\terrain
- 20 ☐ Lack of courtesy
- 21 ☐ Other

Question 46

Finally, is your ability to participate in outdoor recreational activities limited because of a long-term illness, health problem or disability which has lasted, or is expected to last, at least 12 months?

- 1 ☐ Yes, limited a lot
- 2 ☐ Yes, limited a little
- 3 ☐ No, not limited at all

Demographic questions asked

Age

What was your age last birthday? (Type in)

Gender

Sex of respondent:

- 1 ☐ Male
- 2 ☐ Female

ANNEX 3 (continued)

Children in household

Do you have any children in your household of the following ages?

- 1 ☐ Any under 5 years old
- 2 ☐ Any 5-11 years old
- 3 ☐ Any 12-15 years old
- 4 ☐ Any 16-17 years old
- 5 ☐ No – no children

Internet access

Do you yourself access the internet nowadays? If yes, where do you access it?

- 1 ☐ Yes – at home, dial up
- 2 ☐ Yes – at home, broadband
- 3 ☐ Yes – at work
- 4 ☐ Yes – somewhere else
- 5 ☐ No

Car access

How many cars do you have in your household?

- 1 ☐ None
- 2 ☐ One
- 3 ☐ Two+

Working status (Chief Income Earner)

Which member of your household is the Chief Income Earner, that is the person with the largest income, whether from employment, pensions, state benefits, investments or any other sources?

- 1 ☐ Respondent
- 2 ☐ Respondent's spouse/partner
- 3 ☐ Other adult

Working status of Chief Income Earner (CIE)

- 1 ☐ Employed
- 2 ☐ Self-employed
- 3 ☐ Not working, dependent on state benefit
- 4 ☐ Not working, other income

Questions for social class coding

What is the type of firm where the CIE works?

What is the job actually done by the CIE?

What is the title, rank, grade etc of the CIE?

How many people work there altogether?

How many is the CIE responsible for?

ANNEX 3 *(continued)*

Does the CIE have any qualifications (such as apprenticeships, professional qualifications, university degrees, diplomas etc.)?

- 1 ☐ Yes (type in)
- 2 ☐ No

Enter any other relevant details to assist classification of occupation and industry. If no further details, press 'OK'.

ANNEX 4: ADDITIONAL SURVEY DETAILS

Note on questionnaire change and calibration exercise

A new contract to continue to run the Scottish Recreation Survey was offered to TNS in September 2005. At the same time, a number of changes to the survey questionnaire were introduced to help manage its length and to deliver cost efficiencies. The questions affected were those relating to whether any outdoor recreation visits had been made in the previous twelve months and participation and numbers of visits made in the previous four weeks. From September 2005 it was also agreed that the ScRS questions would always be the first set of questions asked in the monthly omnibus survey. Prior to September 2005, the position of the ScRS questions in the omnibus varied and, in some months, followed questions on other subjects which may have impacted on the comparability of the responses. The omnibus survey length is restricted to a maximum of 30 minutes to minimise respondent fatigue.

With the analysis of the full year results for 2005, it became apparent that there had been an increase in the proportion of respondents reporting that they had participated in outdoor recreation in the previous 12 months. Furthermore, the proportions reporting having taken visits in the 4 weeks prior to interview and the mean number of visits reported had also increased. These changes may have been due to a number of factors, including a real increase in participation in outdoor recreation amongst the Scottish population and the effects of campaigns promoting exercise. However, there was a considerably greater average increase for the months after the questionnaire change (September to December), than January to August, suggesting that the questionnaire revisions may have influenced responses.

In an attempt to confirm and measure the scale of the impact of the changes to the questionnaire, a control study was undertaken in the typically high participation months of June and July 2006 and the lower participation months of January and February 2007. During each of these four months, half of the sample was interviewed using the original questionnaire from pre-September 2005 while the other half was interviewed using the new questionnaire. The sampling procedure used ensured that the demographic and geographic profiles of both samples were as similar as possible and that interviewing was undertaken over identical time periods. Over the four months of the calibration exercise some 4,103 interviews were completed – 2,018 using the original questionnaire and 2,085 using the new questionnaire. In both cases, the ScRS questions were asked at the beginning of the interview.

The calibration exercise found that:

- In all four months of interviewing, a larger percentage of those responding to the new questionnaire stated that they had taken visits in the 12 months prior to the interview. However, it was not possible to quantify the size of the difference due to the clustering of three data points and one anomalous data point (January 2007).
- In all four months of interviewing, a larger percentage of those responding to the new questionnaire stated that they had taken visits in the 4 weeks prior to the interview. However, further statistical analysis showed that there was not enough evidence to say that this was a significant difference.
- In three of the four months of interviewing, the mean number of visits reported per respondent was higher amongst those interviewed using the new questionnaire. However, further statistical analysis showed that there was not enough evidence to say that this was a significant difference.

Although the results from the question regarding participation in the twelve months prior to interview showed that there was a significant difference between the original and new questionnaires, it is recommended that there is no attempt to adjust the results pre-September 2005. This is because there is no reliable way to estimate the difference due to the clustering of three data points and one anomalous data point (January 2007) where the responses were markedly different. If the data was more evenly spread, a more reliable estimation could be made.

The results from the questions regarding participation and frequency of visits in the four weeks prior to interview showed that there was not enough evidence to say that there was a significant difference between the original and new questionnaires. There could genuinely be no difference, or it could be that there was not enough data collected to detect a difference.

As the original and new questions were asked at the same point in the omnibus survey, the effect of the changing positions of the ScRS questions cannot be assessed.

The control study concluded, therefore, that results relating to levels of participation in outdoor recreation and the estimates of the total volume and value of visits to the outdoors for the period prior to September 2005 should not be considered as comparable with data collected subsequently. Where these results are presented together, they should be accompanied by an explanatory note regarding the questionnaire change, its possible impact and a reference to the full findings of the calibration exercise which is available under a separate cover (Costley, T, TNS, 2008).

Results regarding the profile of visitors, visits to the outdoors and results regarding the Scottish Outdoor Access Code do not appear to have been so directly affected by the questionnaire change in September 2005. The results for these questions from 2004 and 2005 are therefore presented in this report. It is recommended that any changes identified and conclusions drawn from any such results (based on responses before and after the question changes) are qualified to reflect the questionnaire change in September 2005.

Also since September 2009, questions relating to awareness of the Scottish Outdoor Access Code, what it asks people to do and what it asks farmers and land managers to do have been asked every six months (March and September waves only), a reduction from their inclusion every three months in previous years of the survey.

Change to weighting procedure

From the 2007 annual report onwards, the approach taken to weighting of responses to questions regarding the respondent's most recent outdoor recreation visit was amended to make the results regarding the most recent visit more representative of all visits taken during the survey period.

All respondents who have taken any outdoor recreation visits in the 4 weeks prior to interview are asked to provide the details of a single visit – the one they have taken most recently. This approach collects the details of a sample of visits which is representative of the most recently taken visit rather than all of the visits taken by respondents during the recall period. Within this sample of visits the types of visits taken by frequent participants are under-represented while those taken by infrequent participants are over-represented.

To make the results of questions regarding most recent visits more representative of *all* of the visits taken during the survey period, responses have been weighted by a factor equal to the number of visits taken by the respondent in the 4 weeks prior to interview. For example, the responses provided by a respondent who has taken 2 visits in the 4 week period are

multiplied by 2 while the responses of a respondent who has taken 28 visits are multiplied by 28.

This amended weighting procedure has been applied to all of the 2004 to 2011 visit profile results contained in this report. The change has had the greatest impact upon results relating to duration of visit, distance travelled, transport used and expenditure during visits. Further details of the weighting procedures used are provided in the technical report, which can be downloaded from <http://www.snh.gov.uk/land-and-sea/managing-recreation-and-access/increasing-participation/measuring-participation/>

ANNEX 5: INCLUSION OF RESULTS AT LOCAL AUTHORITY LEVEL

Background

A primary objective of the Scottish Recreation Survey is to measure and collect details about the Scottish adult population's participation in outdoor recreation. To achieve this objective the survey is undertaken through the monthly inclusion of questions in the Scottish Opinion Survey, the consumer omnibus survey operated by TNS. The methodology used in the Scottish Opinion Survey provides a sample of around 1,000 respondents each month, representative of Scotland's adult population.

With data collection undertaken for the Scottish Recreation Survey since July 2003, the number of interviews undertaken within each of Scotland's 32 Local Authorities is now sufficiently large to allow for some analysis to be undertaken at this level. LA level data for the combined three year period 2009 – 2011 are included in this report.

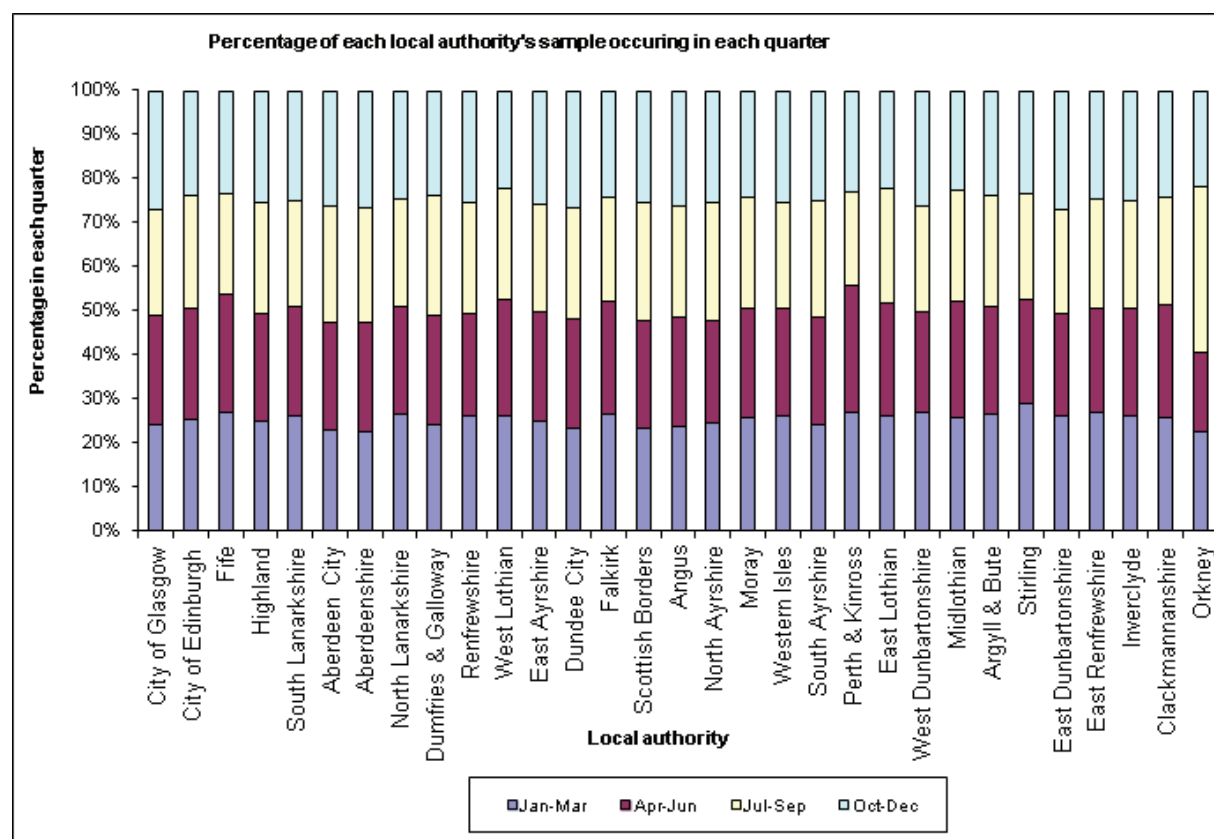
Issue

In some Local Authorities, the sample size is limited and/or there is not an even spread of interviews across all four quarters of the year. This imbalance is due to the sampling scheme for the omnibus survey being designed to provide results representative at a national level. When grouping the responses into 3 or 5 year averages, the balance between the four quarters of the year does even out for some but not all Local Authorities.

The chart overleaf illustrates the distribution of interviewing by quarter in each Local Authority area for the combined 2009 to 2011 period. The Local Authorities are ordered by sample size so that those with the largest sample size are to the left. This highlights that the most uneven sampling occurs in the Local Authorities with the smallest sample size, but not exclusively so.

Distribution of the sampling throughout the year (2009-2011 combined) by Local Authority

NB: Local Authorities are ordered by size so that those with the largest sample size are to the left.



Results regarding frequency of participation

Section 3.2 of this report (Frequency of outdoor visits in the last 12 months) contains results regarding frequency of participation in outdoor recreation during the 12 months prior to interview. Some of the data presented in this section is used by the Scottish Government to measure progress against the National Indicator (NI) to “increase people’s use of Scotland’s outdoors.”

To provide robust results for this measure at a sub-national level, weights have been calculated and applied to data at the Local Authority level to take account of the uneven distribution of sampling. The margins of error associated with these participation results have then been estimated. Section 3.2 contains the participation results for the 18 Local Authorities where we can be reasonably sure that the estimate is correct to within, or equal to, +/-5%.

Other Local Authority level results contained in report

Section 3.10 of this report (Areas visited within Scotland) contains a number of other results at the Local Authority level relating to the destinations of visits and the percentages of visits taken within the respondent's own area of residence.

These results do not relate to the Scottish Government NI and are included for all 32 Local Authorities. To improve accuracy, these results are based upon results obtained for the full nine years of data collection from 2004 to 2012 inclusive. However, given the aforementioned uneven seasonal distribution of interviewing in a number of the local authorities, these results should be treated with a degree of caution.

ANNEX 6: DETAILS OF KEY ANALYSIS CROSSBREAKS

Scottish Index of Multiple Deprivation

The Scottish Index of Multiple Deprivation (SIMD) identifies small areas of concentrated deprivation across the whole of Scotland. It is a relative measure, with areas ranked in relation to one another. Applying rankings to small areas means these can be combined into the categories that the user requires. Where a valid postcode was supplied, this was used to categorise respondents to the Scottish Recreation Survey into the appropriate SIMD ranking. For the purposes of this survey, respondents in the bottom 10% SIMD areas are compared against those in the other 90%.

For further details on SIMD, see <http://www.scotland.gov.uk/Topics/Statistics/SIMD>

Urban/rural

The urban/rural analysis crossbreak is based on the Scottish Government Urban Rural Classification (version 2007-2008), which categorises settlements of 3,000 or fewer people to be rural. Remote areas are based on drive times from settlements of 10,000 or more people. Where a valid postcode was supplied, this was used to categorise respondents in the Scottish Recreation Survey as urban or rural as appropriate.

For further details, see <http://www.scotland.gov.uk/Publications/2008/07/29152642/1>

www.snh.gov.uk

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