



# **The Market for Strategic Recreational Routes**

**Final Report**

**2<sup>nd</sup> September 2008**



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# 1. Background and objectives

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Natural England commissioned research in May 2008 to examine the use of, and demand for Strategic Recreational Routes in England amongst the English adult population. Strategic Recreational Routes are defined as off-road routes used for walking, cycling or horse riding that pass through attractive natural or built heritage, can provide for a journey of more than one day and attract both local and tourist use.



For the purposes of this study, the following definition has been used:

*Mainly traffic-free routes for walking, cycling or horse riding that typically:*

- *have a name*
- *can be enjoyed over a series of days as well as for short trips*
- *are promoted as an attraction to visitors as well as local people.*

This survey forms part of the wider Review of National Trails and other Strategic Recreational Routes which will conclude in September 2008. Together with the outcomes of other stakeholder consultations, the survey results will represent an integral part of this review.

Specifically, the survey aimed to investigate:

- The size and characteristics of the existing and potential market for using strategic recreational routes;
- The types of use that people make and would like to make of these routes for walking, cycling and horse riding;
- Awareness of the supply of opportunities in comparison to actual provision;
- The characteristics of the experience people are seeking;
- The extent to which these routes act as 'flagships' to raise the profile of walking, cycling or horse riding;
- The relative importance of these strategic opportunities compared with the everyday opportunities that exist in people's locality.

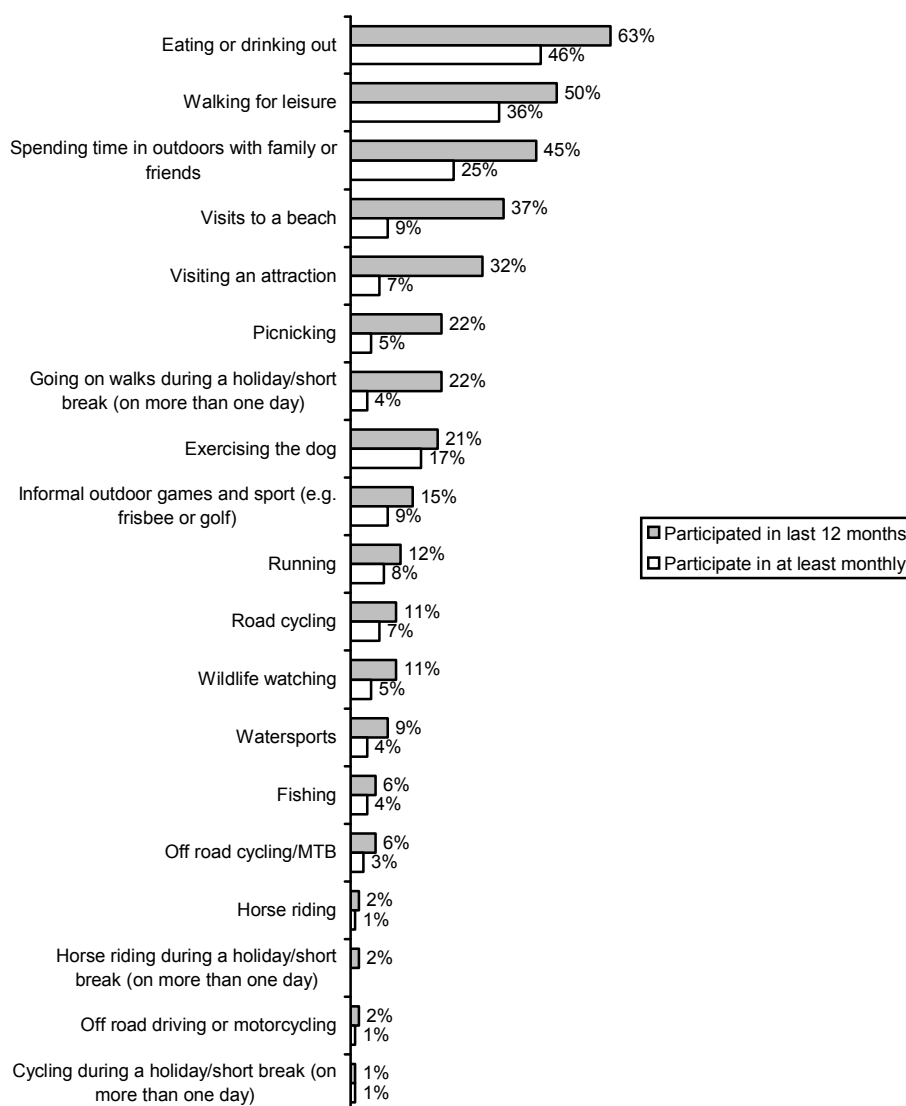
The survey was undertaken by including a series of questions on the TNS face-to-face omnibus survey. A total of 1,787 in-home interviews were undertaken with a representative sample of adults in England (aged 16 or over) between the 25<sup>th</sup> and 29<sup>th</sup> July 2008.

## 2. Main results

### 2.1 Leisure participation

First of all, respondents were asked about their levels of participation in a range of different leisure activities, as illustrated in Figure 2-1 below.

**Figure 2-1 – Leisure participation levels (%)**  
Base: All respondents (1,787)



Half of the English adult population (50%) had undertaken 'walking for leisure' during the 12 months prior to the survey, 21% had exercised their dog and 22% had walked on more than one day of a holiday or short break. Overall, 63% of the adult

population had undertaken one or more of these walking activities during the previous 12 months, an estimated 25.9 million adults.

48% of the adult population normally took part in one or more walking activity every month, an estimated 19.6 million adults.

Other outdoor recreation activities were undertaken by lower proportions of the population with 6% of adults taking part in off-road cycling or mountain biking during the previous 12 months (2.4 million) while 2% took part in horse riding (0.9 million).

Table 2-1 compares the profile of the adult population in England with that of those participating in walking, dog walking, off road cycling and horse riding.

**Table 2-1 – Demographic profile of walking, cycling and horse riding participants (%)**

Base: All respondents

	Adult Population %	Leisure walkers %	Dog walkers %	Off-road cyclists/ MTB %	Horse riders %
<b>Sex</b>					
Male	48	46	42	62	30
Female	52	54	58	38	70
<b>Age</b>					
16-34	32	28	31	42	60
35-54	35	40	41	47	30
55+	33	31	28	10	9
<b>Socio-economic Group</b>					
ABC1	57	61	58	69	71
C2DE	43	39	42	31	29
<b>Children in household</b>					
Yes	31	32	31	43	44
No	69	68	69	57	56
<b>Area of residence</b>					
Urban	85	83	79	81	82
Rural	15	17	21	19	18

Notable variations in these profiles include the following:

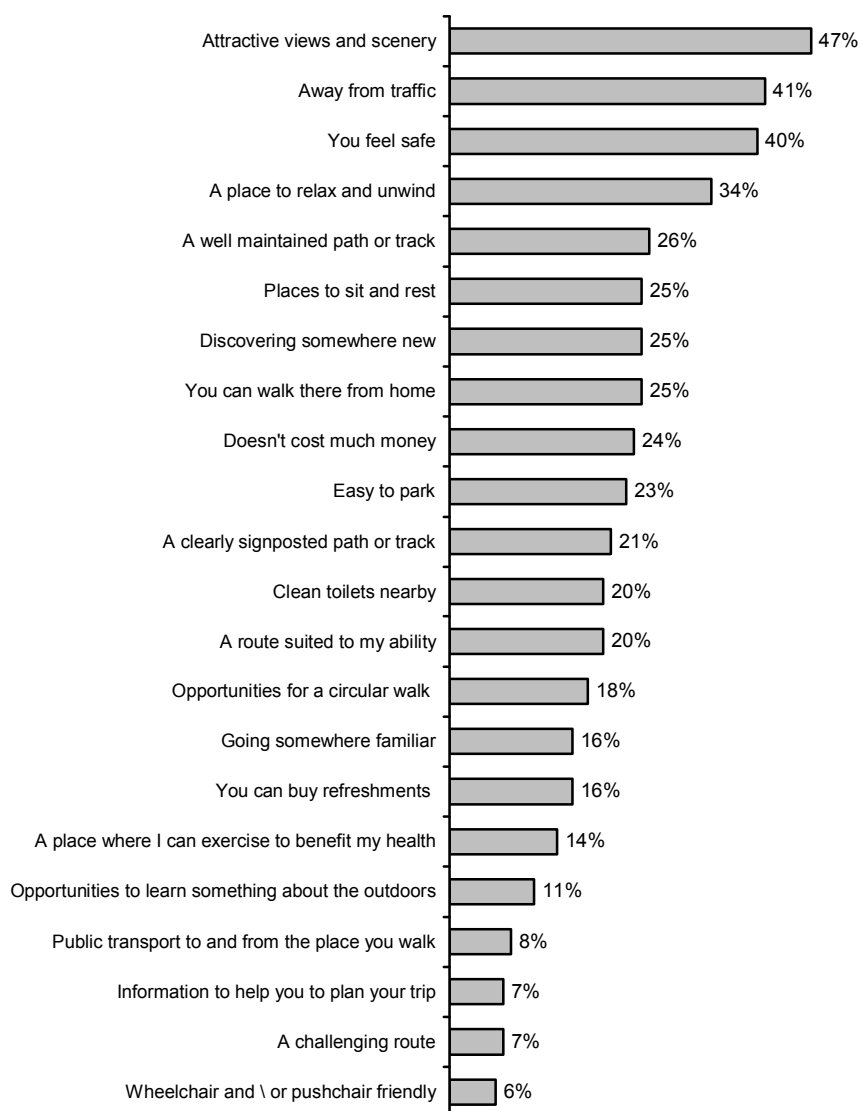
- *Leisure walkers* – compared to the population in general, slightly more likely to be aged 35 to 54 and in the ABC1 socio-economic groups;
- *Dog walkers* – a similar demographic profile to the population as a whole but slightly more likely to live in a rural area;
- *Off-road cyclists/ mountain bikers* – more likely to be males, aged under 55 and in the ABC1 socio-economic groups;
- *Horse riders* – more likely to be females, aged 16 to 34 and in the ABC1 socio-economic groups.

## 2.2 Choosing a place to walk

As shown in Figure 2-2 below, when choosing a place to walk, *attractive views and scenery*, *being away from traffic*, *feeling safe* and *relaxing and unwinding* were important to the largest proportions of walkers. These attributes are likely to reflect the participants' motivations for walking and are therefore of more importance in the decision of where to go than the quality of services or facilities.

Other attributes selected by large proportions as important in their choice of a place to visit included – *a well maintained path or track*, *places to sit and rest*, *discovering somewhere new*, *being able to walk there from home*, *not costing much money* and *ease of parking*.

**Figure 2-2 – Factors which are important when choosing a place to walk (%)**  
Base: All respondents who have walked for leisure in last 12 months (1,090)



The attributes listed varied in importance amongst different demographic groups. Some notable variations included the following:

- *Males* – men were more likely than women to select attractive views and scenery (53% males v 42% females), discovering something new (28% v 22%), exercise and health benefits (17% v 12%) and finding a challenging route (10% v 5%) as being important when choosing a place to walk;
- *Females* – women were more likely than men to select feeling safe (47% v 32%), places to sit and rest (29% v 21%), not costing much (28% v 19%) and clean toilets (24% v 15%) as important when choosing a place to walk;
- *AB socio-economic groups* – members of the most affluent socio-economic groups were more likely than others to rate attractive views and scenery (60%), being away from traffic (52%), a well maintained path (31%), discovering somewhere new (31%) and opportunities for a circular walk (28%) as important when choosing a place to walk;
- *DE socio-economic groups* – members of the least affluent socio-economic groups were more likely than others to rate feeling safe (46%), being able to walk from home (30%), clean toilets (27%), going somewhere familiar (21%) and public transport to and from the place to walk (12%) as important when choosing a place to walk.

## 2.3 Awareness of Strategic Recreational Routes

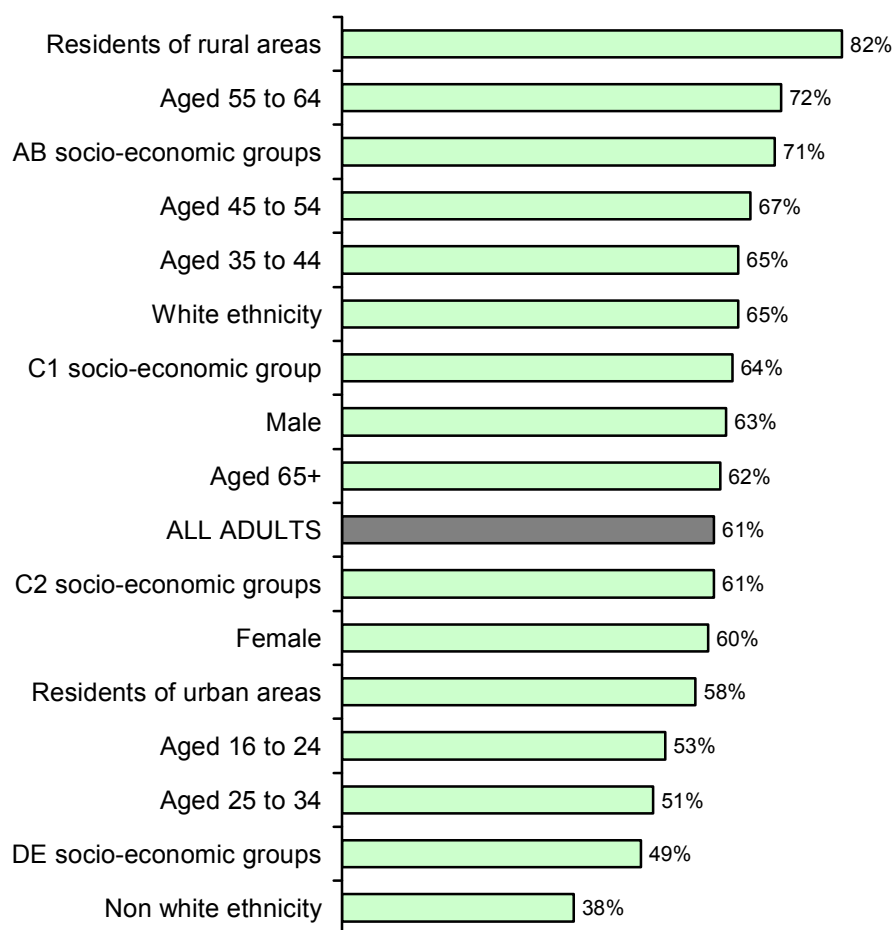
Survey respondents were read the following statement which provided a simple definition of Strategic Recreational Routes (SRRs):

*The next few questions are about mainly traffic-free routes for walking, cycling or horse riding that typically:*

- *have a name*
- *can be enjoyed over a series of days as well as for short trips*
- *are promoted as an attraction to visitors as well as local people*

Overall, 61% of all adults in England claimed to be aware that these types of paths and tracks existed in England, an estimated 25.2 million adults. However, as illustrated in Figure 2-3 below, awareness levels varied significantly between different groups within the population.

**Figure 2-3 – Awareness that Strategic Recreation Routes exist in England – variation by demographics (%)**  
Base: All respondents



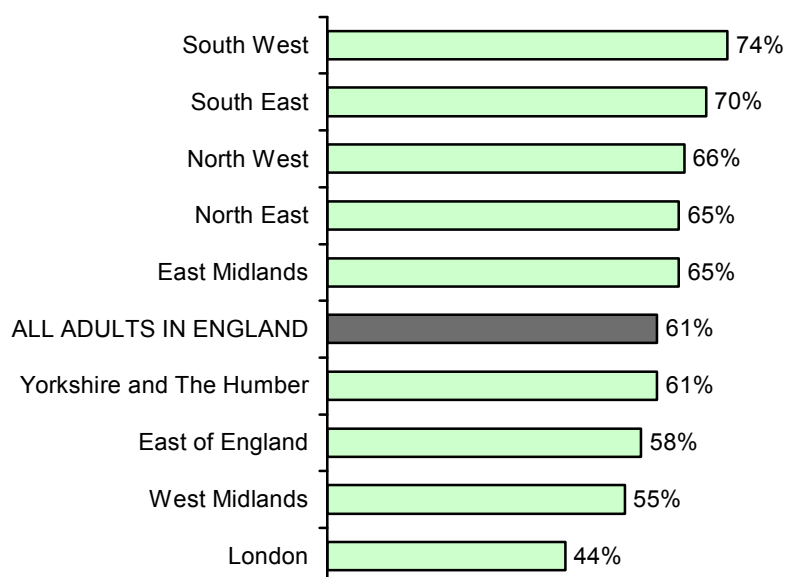
The most notable variations included the following:

- 82% of residents of rural areas were aware compared to 58% of residents of urban areas;
- 71% of members of AB socio-economic groups were aware compared to 49% of DEs;
- Higher awareness amongst older age groups - 72% of those aged 55 to 64, 67% aged 45 to 54 and 65% aged 35 to 44 were aware compared to 53% aged 25 to 34 and 51% aged 25 to 34;
- 65% of people with a white ethnic background were aware compared to 38% of members of black and minority ethnic communities.

Also, 67% of those who had taken part in leisure walking in the previous 12 months were aware of the existence of SRRs compared to 52% who had not been walking.

In terms of geographical regions (Figure 2-4), awareness of the existence of SRRs in England was highest in the South West of England but lowest in London, the only region where awareness was below the 50% level.

**Figure 2-4 – Awareness that Strategic Recreational Routes exist in England – variation by region (%)**  
Base: All respondents



## 2.4 Estimating the supply of Strategic Recreational Routes

Respondents who were aware that Strategic Recreation Routes existed in England were asked to estimate how many, if any, of these routes could be found in their local area. Across England as a whole, 15% of those who were aware that routes existed did not expect there to be any in their own local area. This answer was particularly likely to be provided by residents of the London area (30%).

In contrast, residents of the Yorkshire and Humber region were the most likely to estimate a higher number of routes in their local area with 24% suggesting that there were over 10 local routes.

**Table 2-2 – Estimates of the number of SRRs in respondent's local area (%)**  
Base: All respondents who are aware that SRRs exist in England (1,058)

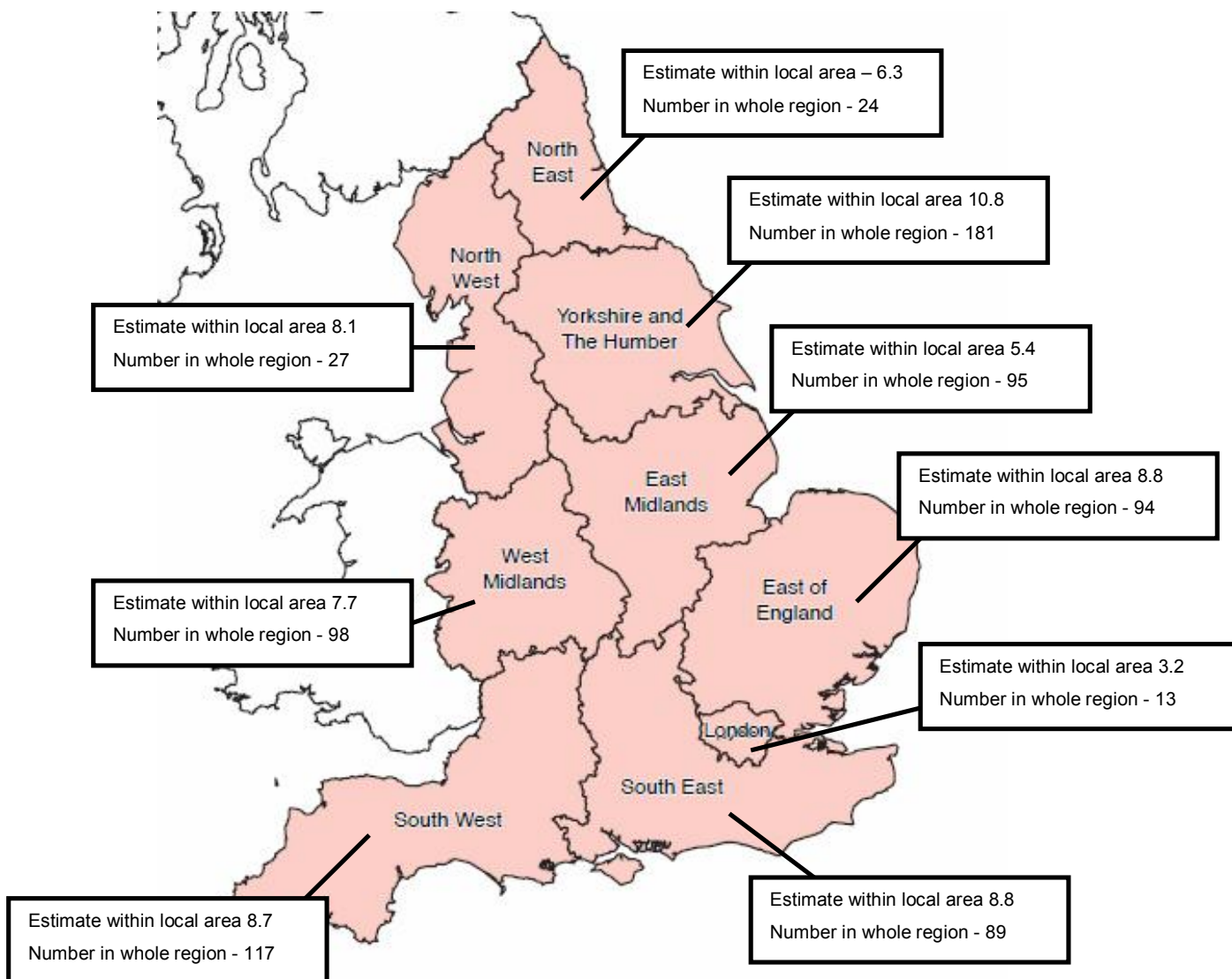
	<b>Total</b>	<b>North East</b>	<b>North West</b>	<b>Yorkshire and the Humber</b>	<b>East Midlands</b>	<b>West Midlands</b>	<b>East of England</b>	<b>London</b>	<b>South East</b>	<b>South West</b>
None	<b>15%</b>	12%	12%	13%	11%	13%	16%	30%	14%	17%
1	<b>15%</b>	16%	10%	22%	21%	14%	17%	17%	13%	9%
2	<b>11%</b>	14%	12%	3%	14%	9%	13%	15%	13%	7%
3 to 5	<b>25%</b>	23%	30%	18%	28%	42%	19%	22%	24%	26%
6 to 10	<b>18%</b>	22%	23%	21%	13%	13%	14%	9%	18%	22%
11 or more	<b>13%</b>	14%	12%	24%	13%	10%	20%	6%	18%	18%
<b>Average</b>	<b>7.8</b>	<b>6.2</b>	<b>8.1</b>	<b>10.8</b>	<b>5.4</b>	<b>7.7</b>	<b>8.8</b>	<b>3.2</b>	<b>8.1</b>	<b>8.7</b>

The average number of routes estimated to be in each respondent's local area was 7.8 but this ranged from 3.3 in London to 10.8 in Yorkshire and the Humber. Also, residents of rural areas and regular users of these types of route were likely to provide higher estimates (10.2 and 10.7 respectively).

The map below compares these regional estimates of the number of local SRRs with the actual numbers within each Government Office Region (these numbers should be treated as approximate as the data used is not available on the basis of GOR, making it necessary to estimate the locations of some routes).

It is likely that the estimates provided by respondents are always going to be lower than those for the whole region as most consider their local area to be a somewhat smaller geographical area. There is some correlation between the estimates provided by respondents and actual numbers with the highest estimates in Yorkshire and the Humber where the real supply is also highest and lowest estimates in London where the supply is lowest.

**Figure 2-5 – Comparison of estimated ‘local’ supply of SRR with actual numbers of route within or passing through each Government Office Region**

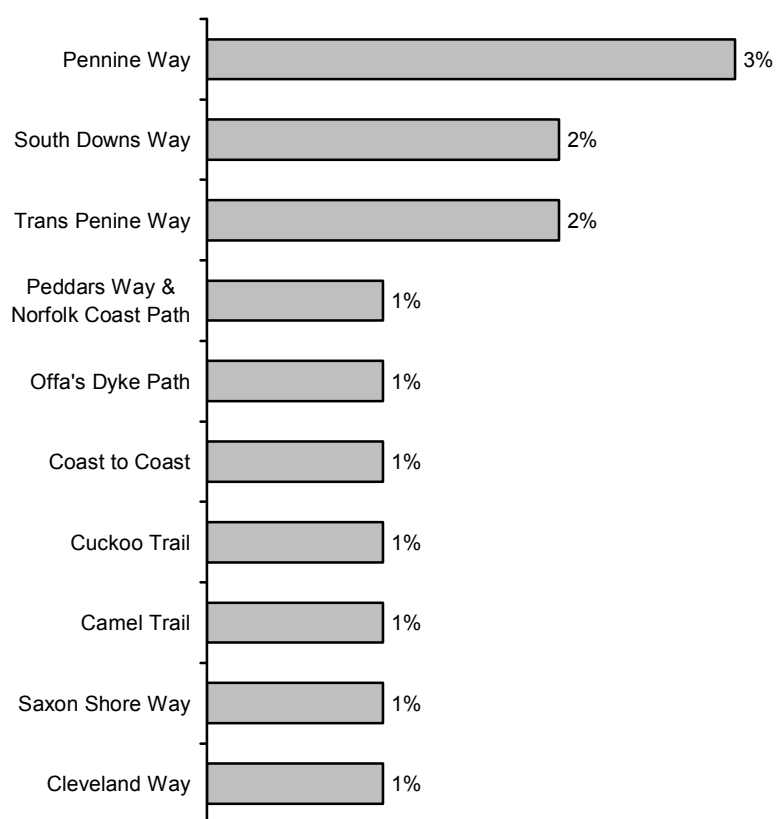


## 2.5 Naming Strategic Recreation Routes

Respondents were asked to provide the names of paths and tracks, either in their local area or elsewhere in England. Overall, around a quarter of the adult population in England provided the name of one or more route with 16% naming one route, 5% naming two routes and 4% naming three or more.

In total, 181 different routes were named by the survey respondents but only 11 of these were mentioned by 1% or more of all respondents, as listed below.

**Figure 2-1 – SRRs named by 1% of more of all respondents (%)**  
Base: All respondents (1,787)



It is notable that most respondents to this question provided the name of a route in their local area rather than one of the National Trails or other major routes listed above. This resulted in the large number of routes shown overleaf being mentioned, mainly by one or two respondents each (130 of the 181 routes). This response reflects the profile of use of SRRs, with larger proportions considering them to be local resources for shorter walks from home.

**Figure 2-3 – Number of times each SRR was named by survey respondents**

Base: All respondents (1,787)

Route	Mentions	Route	Mentions	Route	Mentions
Pennine Way	46	Jubilee Way	2	North to South Surrey	1
South Downs Way	30	Severn Way	2	North Wiltshire Rivers	1
Peddars Way & Norfolk	21	Mary Towneley Loop	2	Red Rose Walk	1
Trans Pennine Way	19	Nene Way	2	Swan's Way	1
Offa's Dyke Path	14	Longdendale Trail	2	Walk Around Hayling	1
Coast to Coast	13	Snowdonia Round	2	Wandle Trail	1
Cuckoo Trail	13	Lea Valley Walk	2	Wey Navigation	1
Camel Trail	11	Manifold Trail	2	Cheshire Ring Canal	1
Saxon Shore Way	10	Hadrian's Coastal	2	Cumberland Way	1
Trans Pennine Trail	9	Derby Canal Ring	2	Ebor Way	1
Cleveland Way	8	Belvoir Witches	1	Sandstone Trail	1
North Downs Way	8	Rushcliffe 100	1	Teesdale Way	1
Yorkshire Wolds Way	8	Jumbles Reservoir	1	Three Peaks Walk	1
South West Coast Path	8	Rossendale Way	1	Windermere Way	1
Icknield Way Path	7	Weaver Valley Way	1	Ashridge Estate	1
Ridgeway	7	Witton Weavers Way	1	Cotswold Link -	1
Ridgeway Link	6	Coast to Coast -	1	Greensand Ridge Walk	1
Aylesbury Ring	6	Dartmoor Ramble	1	Hertfordshire Way	1
Tarka Trail	6	Dartmoor's Ancient	1	Quantock Way	1
Green Chain Walk	6	Heron Way	1	South Bucks Way	1
Thames Path	6	Imber Range Perimeter	1	Wayfarer's Walk	1
Pembrokeshire Coast	5	Itchen Way	1	Cotswolds Walk	1
Greenwich Meridian	5	Ivanhoe Way	1	Cuckoo Walk	1
Flieth Way	5	John Bunyan Trail	1	Gower Way	1
Pilgrim's Way	5	John Ray Walk	1	Great Eastern Pingo	1
Pennine Bridleway	4	Kennet and Avon Walk	1	Midshires Way	1
Pendle Way	4	Lake District Tour	1	South Pennine Walks	1
Thames Path South East	4	Malvern Hills	1	Staffordshire	1
Jurassic Way	4	Marriott's Way	1	Wimpole Way	1
Grand Union Canal Walk	4	Newry Canal Way	1	Brampton Valley Way	1
Viking Way	4	Offa's Hyke	1	Cotswold Way National	1
Hadrian's Wall Path	4	Oxdrove Way	1	Derwent Valley Walk	1
Mersey Valley	3	Red Kite Trail	1	Foss Walk	1
Mersey Way	3	Regent's Canal	1	Grantham Canal	1
Suffolk Coast and	3	River Otter Walk	1	Haematite Trail	1
Stour and Orwell Walk	3	Riversides Way	1	Lakes & Tarns -	1
Greenway Challenge	3	Salisbury Country Way	1	Millennium Way (Warks)	1
Three Peaks of Great	3	Thames Down Link	1	Ouse Valley Way	1
Worcestershire Way	3	Thames Valley Circular	1	Peak District Round	1
Chiltern Way	3	Two Moors Way (Devon)	1	Peterborough	1
Rutland Round	3	Wendover Arm	1	Pride of the Peak Walk	1
Staffordshire Way	3	Chalkland Way	1	Snowdon Challenge Walk	1
Lyke Wake Walk	3	Gipping Valley River	1	High Peak Trail	1
Cumbria Way	3	Grafham Water Circular	1	Penistone Boundary	1
Test Way	3	Irwell Sculpture Trail	1	Ainsty Bounds Walk	1
Dartmoor Way	3	Kirklees Way	1	Greensand Way	1
Gritstone Trail	3	Leeds Country Way	1	Montgomery Canal	1
Dove Valley Trail	3	Mal Evans Way - Borth	1	Lancashire Loop	1
Leicestershire Round	3	Sandlings Walk	1	Chesterfield Round	1
Alternative Pennine	3	Tees Link	1	Coventry Canal Walk	1
Bristol & Bath Railway	3	Wadsworth Millenium	1	Wainwright Memorial	1
Thames Valley Walk	2	Yorkshire Dales	1	Carpet Baggers 50	1
Shropshire Way	2	Yorkshire Ridings 200	1	Circular Walks in the	1
Tissington Trail	2	Yorkshire Water Way	1	Cistercian Way	1
Hadrian's Way	2	Basingstoke Canal Walk	1	Cumbria Coastal Way	1
Pendle and Ribble	2	Brecon Beacons	1	Famous Highland Drive	1
Rutland Water	2	Donnington Way	1	High Weald Walk	1
Wirral Way	2	Epping Forest	1	Inn Way...to the Lake	1
Thames Estuary Trail	2	Goyt Way	1	Weavers Way	1
Cornwall Coast Path	2	Macclesfield & Peak	1	Quantock Greenway	1

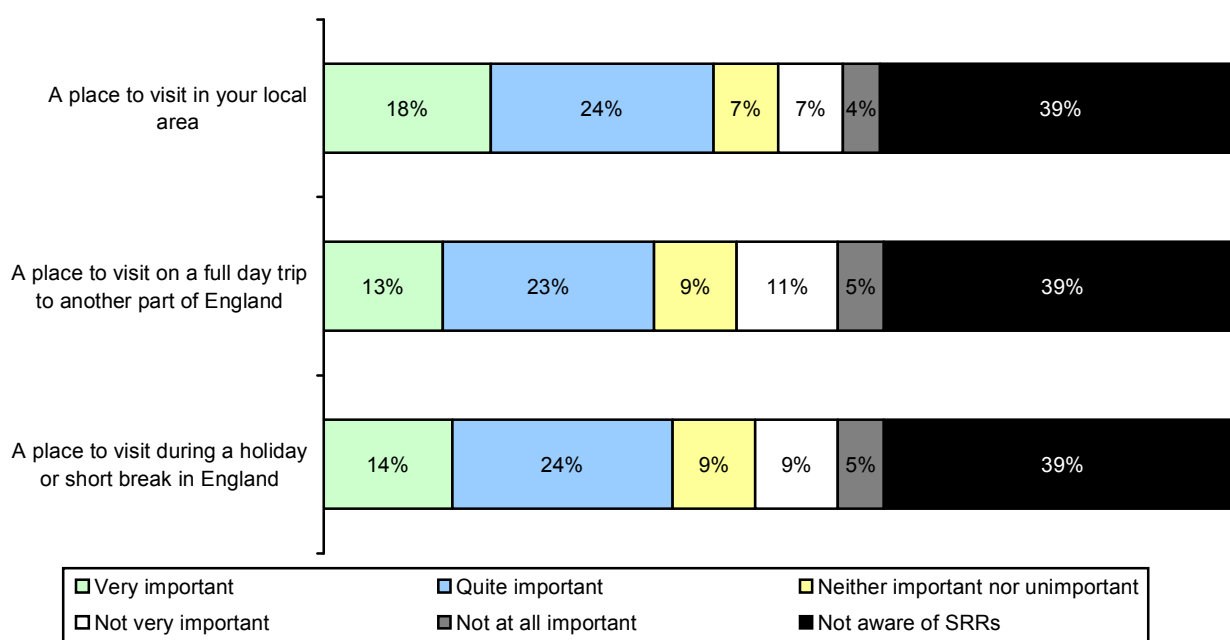
It is important to note that this question was asked without any prompting of the names of routes. Therefore, the spontaneous responses provided relate to the routes which are most likely to be ‘top of mind’ with respondents. Therefore, these results should not be treated as an accurate measurement of awareness of different routes. To obtain a more accurate measure of awareness, a further prompted question asking about recognition of the names of a number of the key routes in England and elsewhere in the world was also asked, as described in Section 2.11.

## 2.6 Importance of Strategic Recreational Routes

Respondents were asked to indicate how important SRRs were to them as places to visit either for a trip in their local area, day trips to places further afield or as places to visit while on holiday or a short break in England.

As the chart below illustrates, 18% rated SRRs as ‘very important’ places to visit in their local area while smaller proportions provided this rating to SRRs as places to visit on full day trips to other parts of England (13%) or during holidays and short breaks (14%).

**Figure 2-6 – Importance of SRRs in local area, for day trip and during holidays and short breaks (%)**  
Base: All respondents (1,787)



Certain groups within the population were more likely to perceive routes as being 'very important':

*A place to visit in your local area* – more important to those aged 55-64 (25%), residents of rural areas (17%), residents of North West of England (24%) and those who used SRRs in their local area during the previous year (37%). Less important to people aged 16 to 24 (13%) and residents of London (15%);

*A place to visit on a full day trip to another part of England* – more important to those aged 55 to 64 (17%), C2 social grade (16%), residents of rural areas (17%) and those who used SRRs during a day trip in the last year (37%).

*A place to visit during a holiday or short break in England* – more important to those aged 55 to 64 (19%), residents of rural areas (18%) and those who have used SRRs during a holiday or break in England in the last year (36%). Less important to members of DE socio-economic grades (9%).

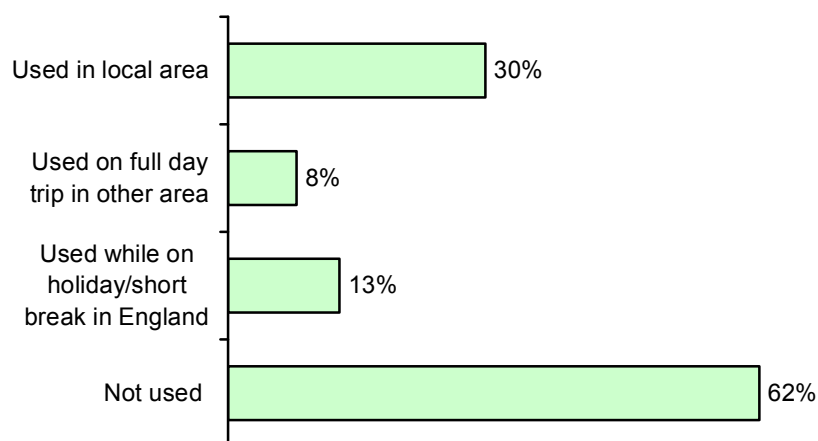
Overall 23% of the adult population in England rated SRRs as 'very important' in one or more of the above contexts (i.e. for local use, on day trips and/or during holidays), an estimated 9.3 million adults.

## 2.7 Use of Strategic Recreational Routes

38% of adults resident in England stated that they had walked, cycled or been horse riding on a SRR during the previous 12 months, an estimated 15.7 million adults. As the chart below illustrates, the largest proportions stated that they had used a route in their local area (30%) while 8% used a route further afield during a day trip and 13% used a route during a holiday or short break in England.

**Figure 2-7 – Use of SRRs in last 12 months in local area, on day trips and during holidays and short breaks (%)**

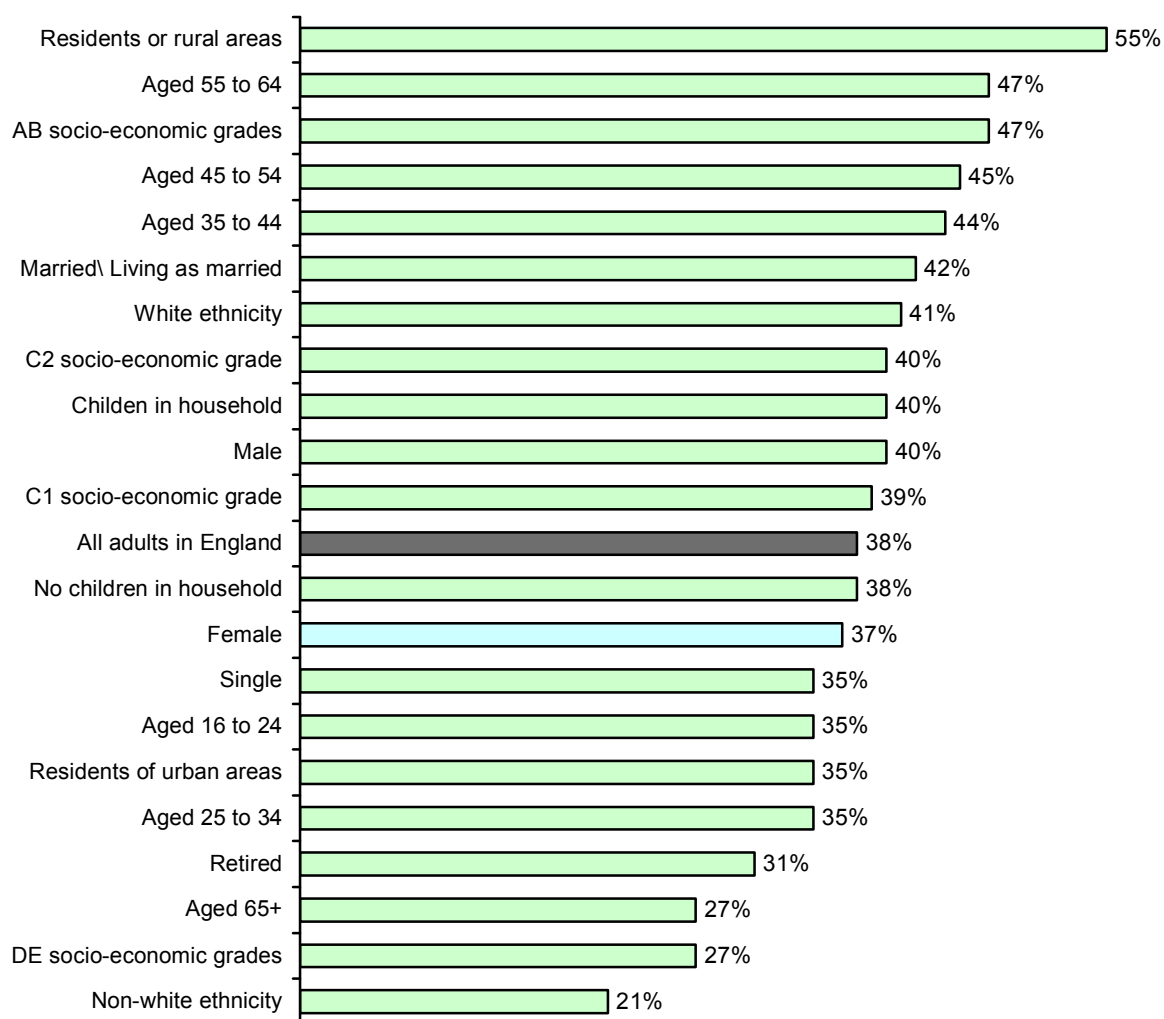
Base: All respondents (1,787)



Overall levels of use of routes varied by demographic groups, as illustrated in Figure 2-8 overleaf. Use of SRRs was highest amongst residents of rural areas (55% used in last 12 months), those aged 55 to 65 (47%) and members of the AB socio-economic grades (47%). Conversely, use was lowest amongst those aged 65 and over (27%), members of the DE socio-economic grades (27%) and members of black and minority ethnic communities (21%).

**Figure 2-8 – Use of Strategic Recreational Routes in last 12 months – variation by demographics (%)**

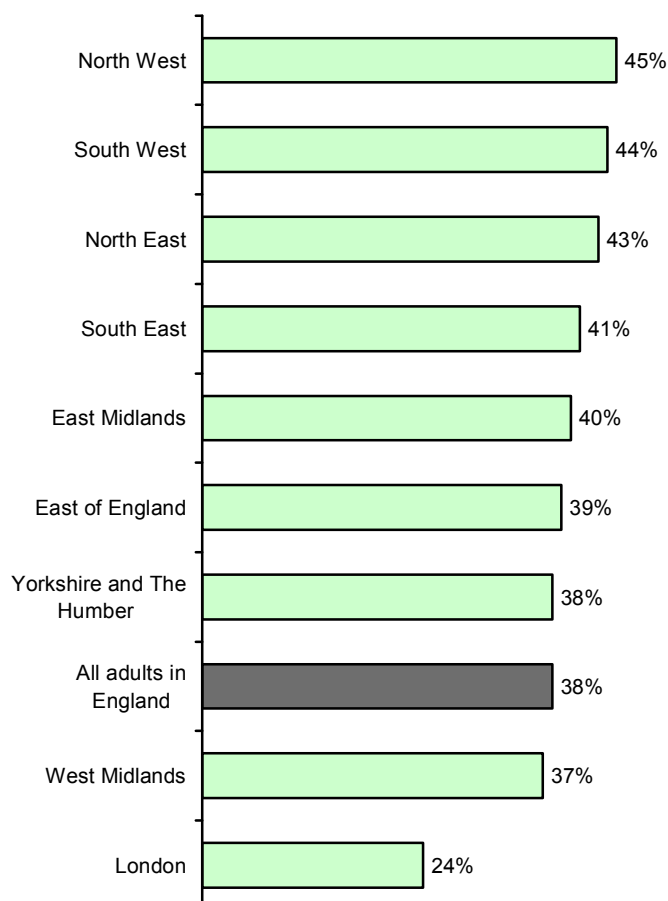
Base: All respondents



It is notable that the variations in levels of use featured above reflect the variations in levels of awareness of SRRs, as described in Section 2.3. At the overall level, all adults in England, around three in five of those who were aware of routes (62%) also indicated that they had used them during the previous 12 months. A similar ratio of users was found amongst those aware of routes in nearly all of the demographic groups above with the notable exception of those aged 65 and over. Amongst this older age group, only 43% of those aware of routes had also used them.

Geographical variations in levels of use of routes are illustrated in Figure 2-9 below. Use varied from 45% of the adult population in the North West and 44% in the South West to 24% in London.

**Figure 2-9 – Use of Strategic Recreational Routes in last 12 months – variation by region (%)**  
Base: All respondents



It should be noted that the above levels of use are as claimed by respondents on the basis of the definition they were provided, which is shown in italics on page 7 of this report. There may be some degree of over stating with respondents either mistaking other types of walking routes as SRRs or thinking further back than the 12 months' period asked about<sup>1</sup>.

<sup>1</sup> This measurement error is known as 'telescoping' and occurs when a survey respondent recalls a relatively rare event as happening more recently than it actually did.

## 2.8 Non-users of Strategic Recreational Routes

The 62% of adults who had not used SRRs during the 12 months prior to the survey were asked about other activities they had undertaken during this period. Amongst this group:

- 32% had walked on other paths or tracks for leisure
- 8% had cycled on other paths or tracks for leisure
- 1% had ridden a horse on other tracks or bridleways for leisure

Also, 53% of this group had walked to the shops, 16% had walked to work, 7% had cycled to the shops and 4% had cycled to work. About a third of the non-users of SRRs (34%) had not undertaken any of these walking, cycling and riding activities, that is 21% of the adult population in England.

Table 2-3 below compares the demographic profile of the adult population in England with the profile of users of SRRs, those who used other paths and tracks but not SRRs and those who did not walk on any types of route, path or track.

Non-users of SRRs and other paths and tracks (the column on the far right) were more likely to be aged over 55 (41% were aged over 65), to be members of the C2DE socio-economic groups, to have no children in their household and to live in urban areas.

**Table 2-3 – Demographic profile of those who walked on SRRs, those who walked on other routes and those who did not use either (%)**

Base: All respondents

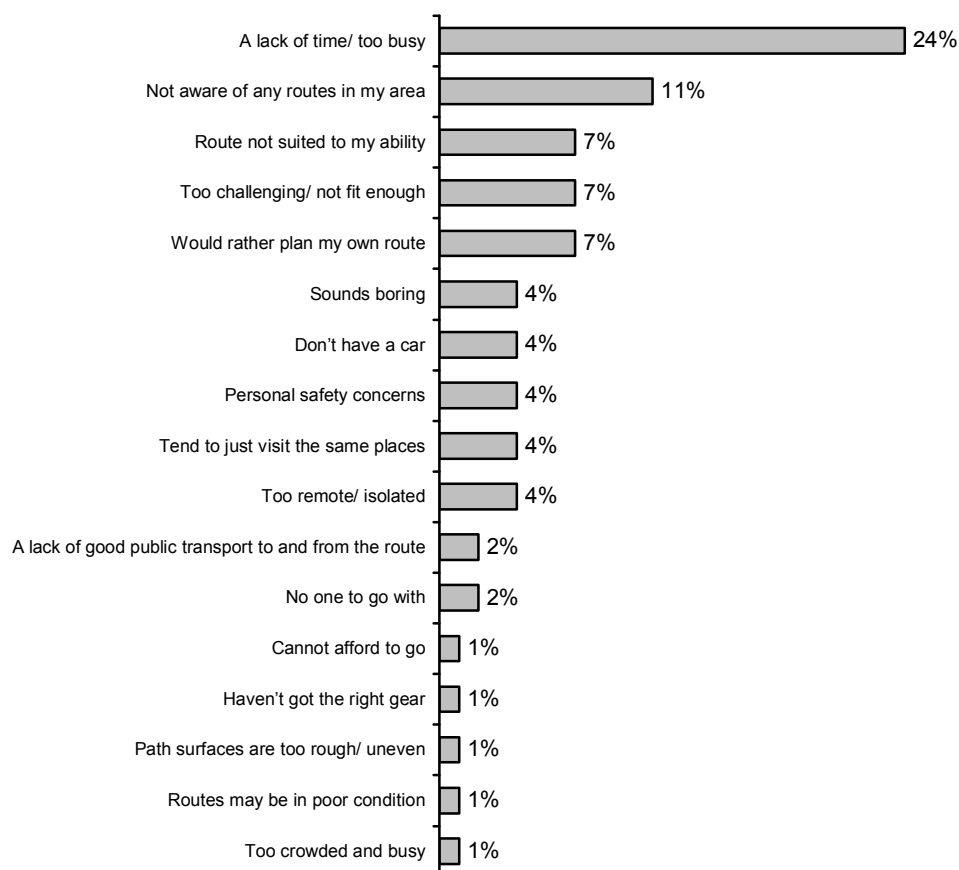
	Adult Population %	Walked on SRRs	Walked on other paths & tracks for leisure but not SRRs	Not walked on SRRs or other paths & tracks
<b>Sex</b>				
Male	48	50	47	43
Female	52	50	53	56
<b>Age</b>				
16-34	32	29	34	23
35-54	35	40	43	23
55+	33	30	23	54
<b>Socio-economic Group</b>				
ABC1	57	62	65	44
C2DE	43	38	35	56
<b>Children in household</b>				
Yes	31	32	39	20
No	69	68	61	80
<b>Area of residence</b>				
Urban	85	78	85	88
Rural	15	22	15	12

Comparing the profile of users of SRRs and those who did not use SRRs but walked for leisure on other local paths and routes, SRR users were slightly more likely to be aged 50 or over, to have no children in their household and to live in rural areas.

Non-users were asked their reasons for not using Strategic Recreation Routes during the previous 12 months, as illustrated below. The most frequently provided reason was 'a lack of time' (24% overall) which was most likely to be provided by those aged 35 to 44, members of the AB socio-economic grades, people who work full time and people with children in their household.

The second most frequently provided reason related to a lack of awareness of the routes (11% overall). This response was provided by larger proportions of people aged 35 to 44 and residents of London and the South East.

**Figure 2-10 – Reasons for not using an SRR in last 12 months (%)**  
Base: Respondent who have not used an SRR in last 12 months (1,159)



While 32% of all non-users of SRRs had walked for leisure on other paths or tracks for leisure, this proportion varied according to the 'barriers' to using SRRs. Most notably, larger proportions of respondents who stated that they did not use SRRs

because they *'tended to just visit the same places'*, *'would rather plan their own route'*, were *'not aware of any routes'* or because of a *'lack of good public transport to and from the route'* had walked on other paths and tracks (52%, 51%, 49% and 46% respectively). Conversely, those who stated that SRR would be *'too challenging'*, that they sounded *'boring'* or that they did not have a car were less likely to have walked on other paths and routes during the previous 12 months (12%, 22% and 22% respectively).

These variations provide some distinction between the issues which prevent people from walking in general and those which make walkers more likely to use alternatives to SRRs.

## 2.9 Profile of use of Strategic Recreational Routes

The 38% of respondents who stated that they had used one or more SRR in the previous 12 months were asked a series of questions about the characteristics of their usage.

### 2.9.1 Frequency of use

As shown below, 39% of path users (15% of the total adult population) stated that they normally used the route(s) at least once a week, with 10% indicating daily use.

**Table 2-4 – Frequency of use of SRRs (%)**  
Base: Respondents who have used an SRR in last 12 months (628)

	SRR users %
Most days	10%
Several times a week	12%
Once a week	18%
Once or twice a month	27%
Once every 2 or 3 months	16%
Once or twice over last 12 months	15%

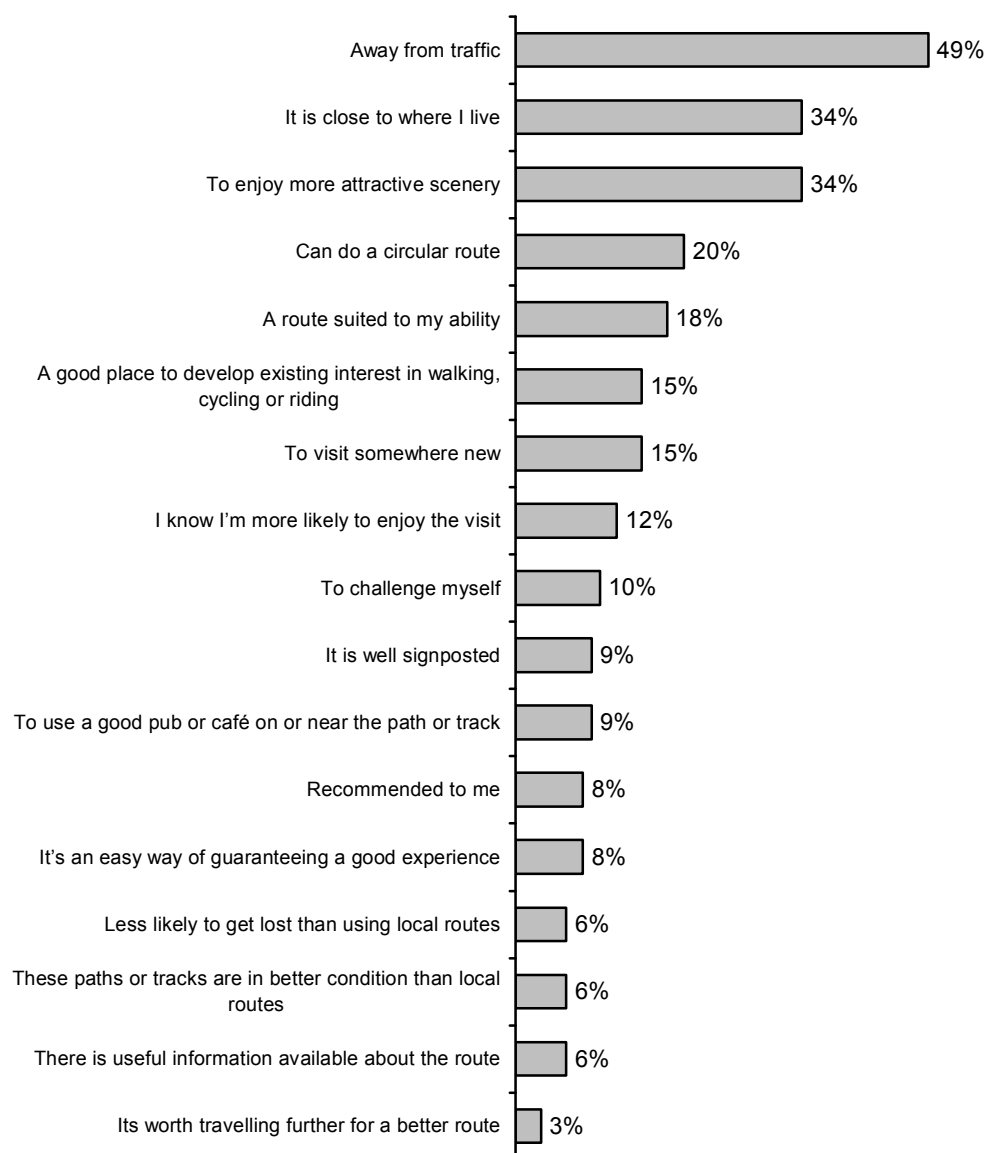
Applying these proportions to the estimated number of SRR users (15.7 million adults), suggests that around 6.2 million used the routes at least once a week (15% of total adult population of England) while 9.5 million used them less often (23% of population).

## 2.9.2 Motivations

When asked to state their main reasons for using one or more SRR during the previous 12 months, the largest proportions of users selected *'away from traffic'* (49%), *'it is close to where I live'* (34%) and *'to enjoy more attractive scenery'* (34%).

**Figure 2-11 – Main reasons for using SRRs (%)**

Base: Respondents who have used an SRR in last 12 months (628)



It is useful to compare the reasons provided for using SRRs with the responses to the more general question regarding factors important when choosing a place to go walking (Section 2.2). Being away from traffic and attractive views and scenery are two of the most important factors when choosing a place to walk and these are also important reasons for choosing to use an SRR. Furthermore, large proportions of respondents stated that they choose to use an SRR because of its proximity to their

home, the option of doing a circular route and because the route was suited to their ability.

Listed below are some of the variations in the importance of these main motivations amongst different groups within the population:

*Away from traffic (49% overall)* – this reason was more important to people aged 55 to 64 (59%), members of the AB socio-economic groups (53%), people with children (53%) and residents of rural areas (57%).

*It is close to where I live (34% overall)* – more important to people aged 65 and over (44%) and retired people (49%).

*To enjoy more attractive scenery (34% overall)* – more important to people aged 55 to 64 (45%) and residents of rural areas (41%).

*Can do a circular route (20% overall)* – more important to people aged 55 to 64 (34%) and residents of rural areas (27%).

*A route suited to my ability (18% overall)* – more important to women (22%), people aged 65 or over (33%) and retired people (32%).

Table 2-5 overleaf compares the motivations for using SRRs amongst respondents who have used these types of routes locally, on longer day trips to other areas and while on holidays and short breaks in England. Some of the key variations between these different types of use are highlighted in **bold**.

This comparison illustrates the greater importance of SRRs being close to home amongst the local users while those who use SRRs on day trips to other areas are more likely to be motivated by more attractive scenery, circular routes and being able to visit somewhere new.

**Table 2-5 – Main reasons for using SRR by type of use (%)**

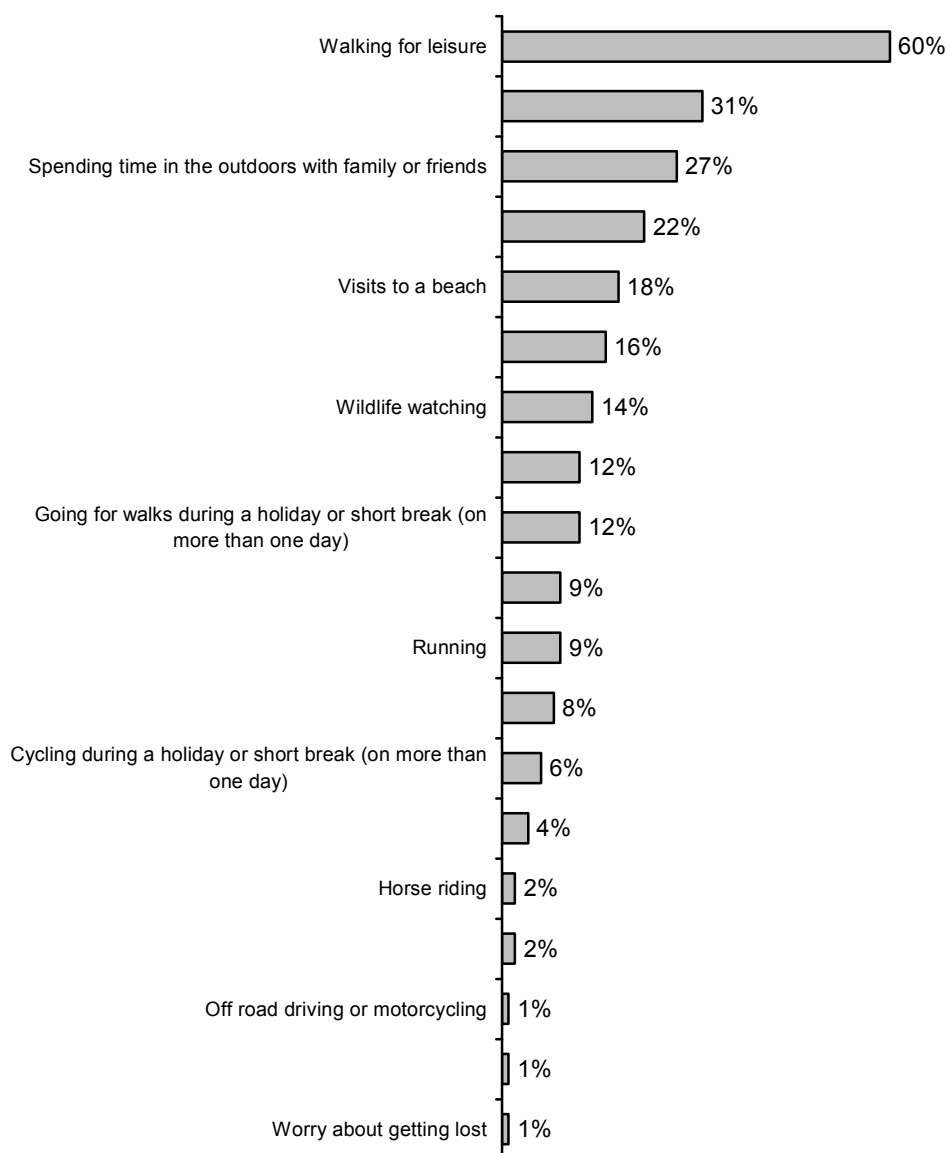
Base: Respondents who have used an SRR in last 12 months (628)

	Used local SRRs	Used on non-local day trips	Used on holidays/ breaks
Away from traffic	52	51	47
It is close to where I live	<b>39</b>	33	24
To enjoy more attractive scenery	34	<b>50</b>	<b>40</b>
Can do a circular route	22	<b>33</b>	22
A route suited to my ability	18	22	22
A good place to develop my existing interest in walking, cycling or riding	15	21	19
I know I'm more likely to enjoy the visit	12	15	15
To visit somewhere new	12	<b>27</b>	21
It is well signposted	10	11	9
To challenge myself	10	<b>18</b>	15
To use a good pub or café on or near the path or track	9	<b>16</b>	<b>13</b>
Recommended to me	8	11	7
It's an easy way of guaranteeing a good experience	8	<b>15</b>	9
Less likely to get lost than using local routes	6	6	7
These paths or tracks are in better condition than local routes	6	8	5
There is useful information available about the route	4	<b>12</b>	<b>11</b>
It's worth travelling further for a better route	3	7	5

## Activities undertaken

As might be expected, the most frequently undertaken activity during visits to SRRs was walking for leisure (60%) while 22% took part in dog walking. Other activities undertaken by large proportions of users during visits to SRRs included eating or drinking out (31%), spending time with family or friends (27%), visits to a beach (18%) and picnics (16%).

**Figure 2-12 – Activities undertaken during visits to SRRs (%)**  
Base: Respondents who have used an SRR in last 12 months (628)



In total, 82% of path users stated that they had taken part in either walking, running, cycling or horse riding during visits to SRRs. These users were asked to state how far they had gone on the route during their most recent visit.

As the table below illustrates, while 24% walked, ran, cycled or rode less than 2 miles and 10% went more than 10 miles, the largest proportion travelled between 2 and 5 miles (47%). The average distance travelled was 5.6 miles.

**Table 2-6 – Distance travelled on SRR during most recent visit (%)**

Base: Respondents who have run, walked, cycled or gone horse riding on an SRR in last 12 months (530)

	SRR users %
Less than 1 mile	6
1 to 2 miles	18
2 to 5 miles	47
6 to 10 miles	19
11 to 20 miles	8
Over 20 miles	2
<i>Average:</i>	<i>5.6 miles</i>

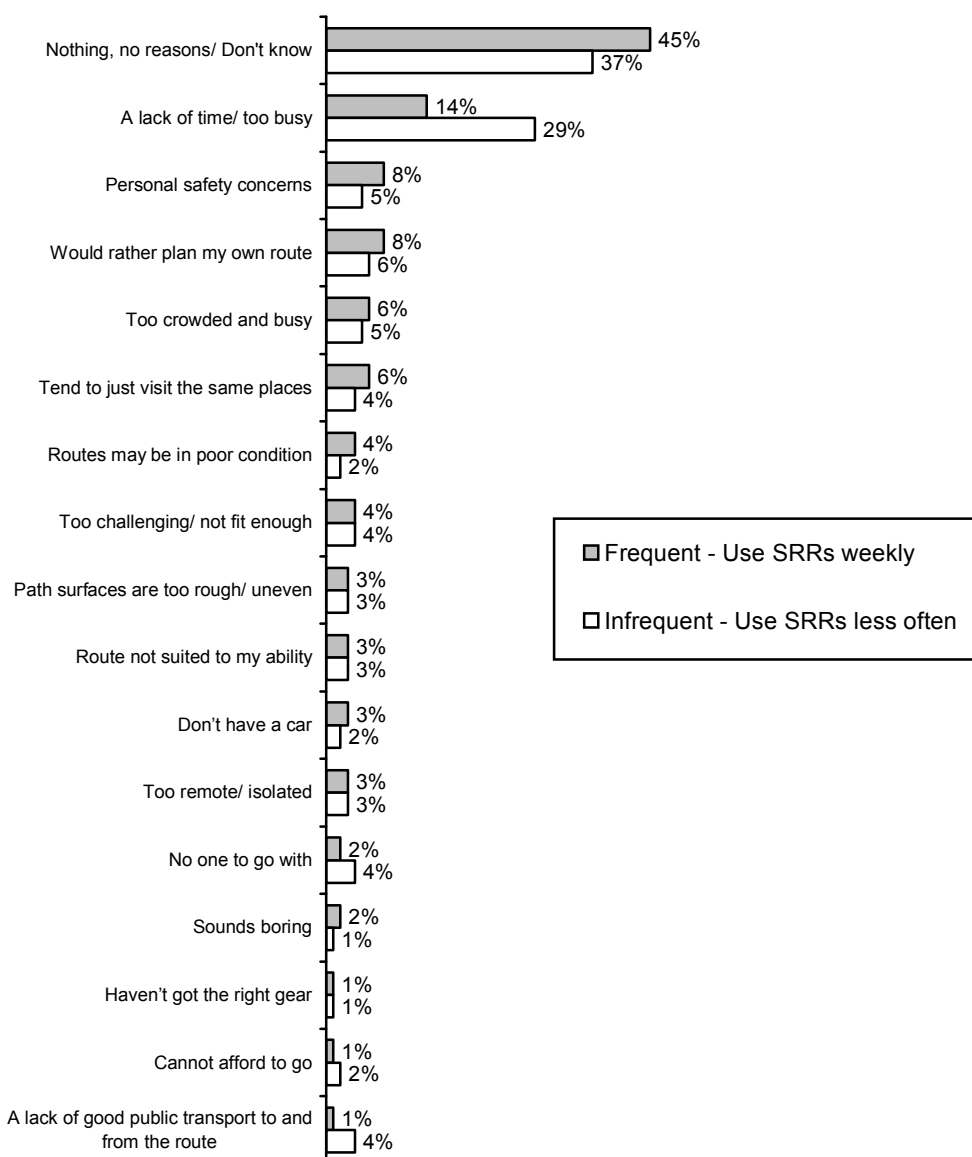
A larger proportion of women, people aged 65 or over and members of DE socio-economic groups went less than 2 miles during their most recent visit to a route (31%, 32% and 36% respectively). Conversely, members of the AB socio-economic groups were more likely to have gone more than 10 miles on their last visit (15%).

## 2.10 Developing use of Strategic Recreational Routes

### 2.10.1 Reasons for not using routes more often

All users of the SRRs were asked to indicate if anything prevented them from using these routes as much as they would like to. The results obtained amongst frequent (at least weekly) and infrequent (less than weekly) users are illustrated in Figure 2-13.

**Figure 2-13 – Reasons for not using SRRs as much as would like to in last 12 months (%)**  
Base: All respondents



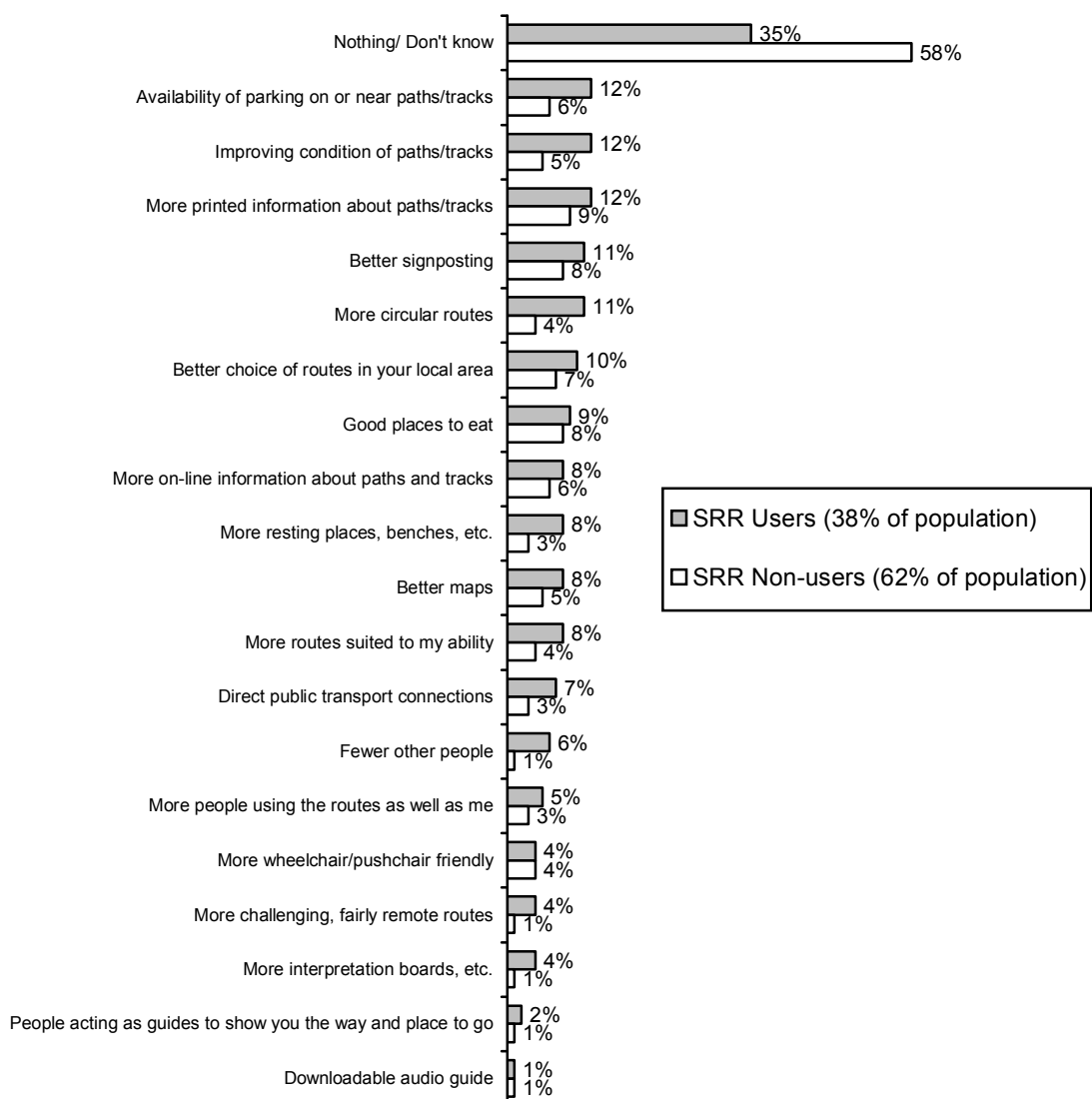
Notably, a large proportion of path users indicated that nothing had prevented them from using SRRs as much as they wanted to in the last year, a response which was particularly likely to be provided by those who used the routes most weeks.

A 'lack of time or being too busy' was provided as a reason by 14% of those who normally used SRRs on a weekly basis and 29% of those who used routes less often. Path users who provided being too busy as a reason were likely to work full or part time, to be in the AB socio-economic groups and to have children in their household.

### 2.10.2 Increasing local use of Strategic Recreational Routes

Respondents were shown a list of possibilities and asked to indicate which, if any, would make them 'a lot more likely' to use their local Strategic Recreational Routes in the future. The results of this question obtained amongst current users and non-users of routes are shown below.

**Figure 2-14 – Factors which would make respondents a lot more likely to use local SRRs in future (%)**  
Base: All respondents



Around a third (35%) of those who had used a Strategic Recreational Route during the previous 12 months stated that nothing would make them 'a lot more likely' to use their local routes or that they did not know what would make them more likely to use them. This response was obtained amongst 58% of those who had not used routes in the previous 12 months.

Amongst those who had used SRRs in the previous 12 months the most frequently selected answer options, which would make them likely to use their local SRRs more often were as follows:

- Availability of parking on or near paths and tracks (12%)
- Improving the condition of paths and tracks (12%)
- More printed information about paths and tracks (12%)
- Better signposting (11%)
- More circular routes (11%).

Those who had not used SRRs in the previous 12 months were generally less likely to select any of the answer options but for those who did, the following were most likely to be mentioned:

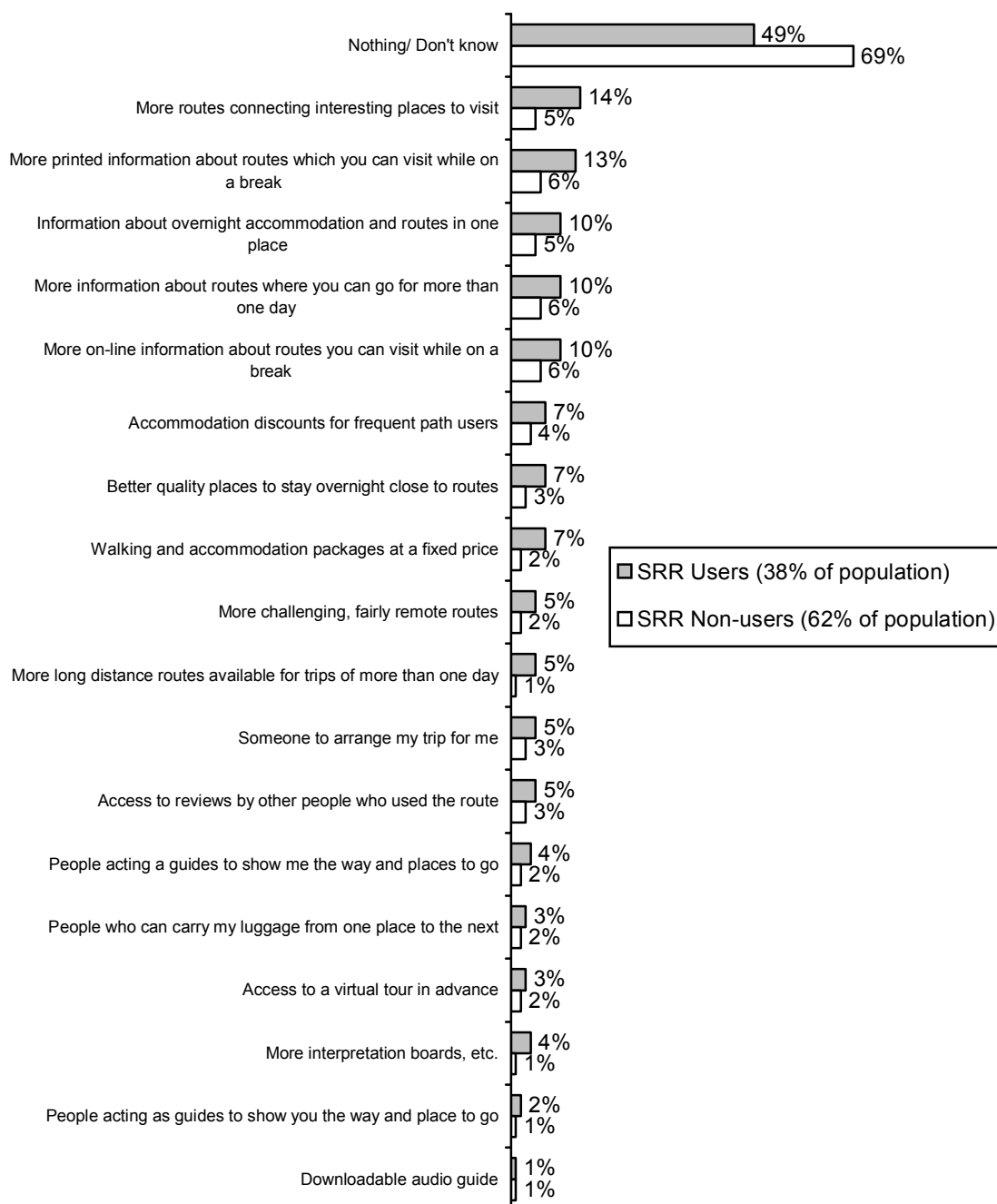
- More printed information about paths and tracks (9%)
- Better signposting (8%)
- Good places to eat or drink out on or near paths/tracks (8%)
- Better choice of routes in your local area (7%)
- Availability of parking on or near paths and tracks (6%).

### 2.10.3 Increasing holiday and short break use of Strategic Recreational Routes

Respondents were next shown a list of possible initiatives and asked to indicate which, if any, would make them 'a lot more likely to use' Strategic Recreation Routes outside of their local area during visits lasting more than one day.

**Figure 2-15 – Factors which would make respondents a lot more likely to use SRRs in other areas in future (%)**

Base: All respondents



Around half of current users of SRRs stated that nothing would make them a lot more likely to use routes during holiday and short breaks or that they did not know (49%). A larger proportion of non-users provided this response (69%).

Amongst those who had used SRRs in the previous 12 months, those initiatives which would make them likely to use SRRs outside of their local area while on a holiday or break were as follows:

- More routes connecting interesting places to visit (14%)
- More printed information about routes which you can visit while on a break (13%)
- Information about overnight accommodation and routes in one place (10%)
- More information about routes where you can go for more than one day (10%)
- More on-line information about routes you can visit while on a break (10%).

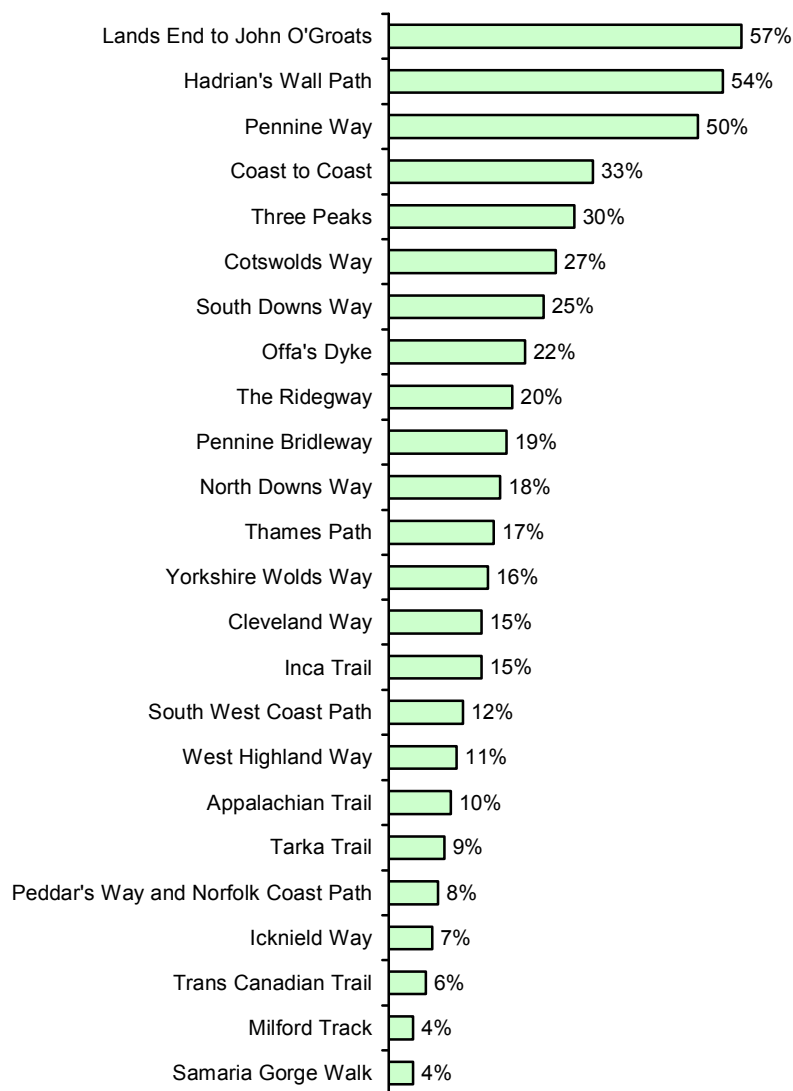
Those who had not used SRRs in the previous 12 months selected a similar set:

- More on-line information about routes you can visit while on a break (6%)
- More information about routes where you can go for more than one day (6%)
- More printed information about routes which you can visit while on a break (6%)
- More routes connecting interesting places to visit (5%)
- Information about overnight accommodation and routes in one place (5%).

## 2.11 Prompted awareness of routes

Finally, all respondents were shown a list of long distance routes in England and elsewhere in the world and asked to select which ones they had heard of. Overall, 79% of respondents recognised the names of one or more of the routes shown.

**Figure 2-16 – Prompted recognition of names of long distance routes in England and elsewhere (%)**  
Base: All respondents (1,787)



### 3. Profiling target markets

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One of the key objectives of this study was to obtain a measure of the size and characteristics of the existing and potential market segments for using Strategic Recreational Routes.

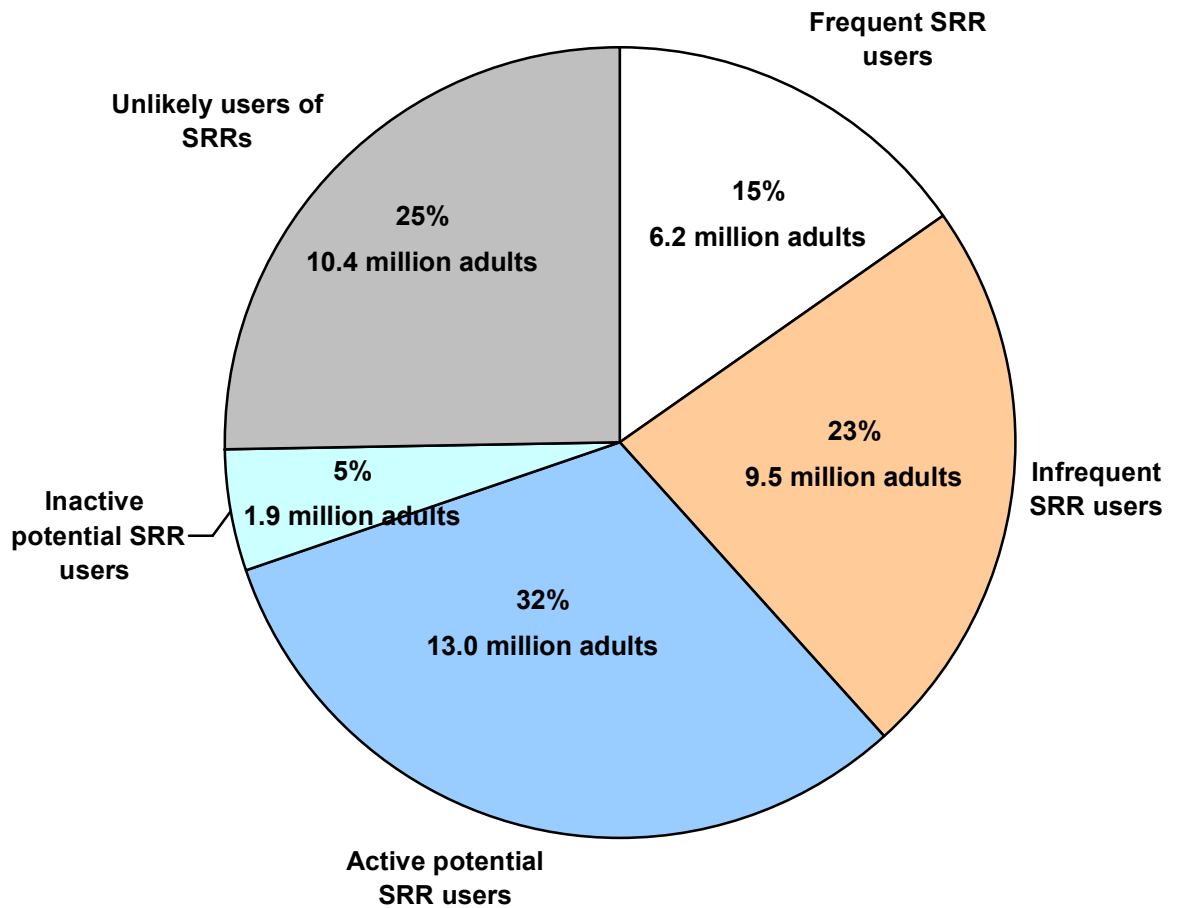
The following sections provide a summary of the size and profile of the following market segments:

- *Frequent users of Strategic Recreational Routes* – those who normally use routes on a weekly basis or more often.
- *Infrequent users of Strategic Recreational Routes* – those who used routes at least once in the previous 12 months but do not normally use them on a weekly basis.
- *Active potential users of Strategic Recreational Routes* – those who have not used Strategic Recreational Routes in the previous 12 months but have taken part in other walking for leisure during this period.
- *Inactive potential users of Strategic Recreational Routes* – those who have not used Strategic Recreational Routes in the previous 12 months or undertaken other walking for leisure but have stated that more information or facility improvements could make them a lot more likely to use a route.
- *Unlikely users of Strategic Recreational Routes* – those who have not used Strategic Recreational Routes in the previous 12 months, undertaken other walking for leisure and have stated that nothing would make them more likely to use a route.

### 3.1 Overview

The chart below illustrates the scale of each of these market segments within the adult population in England. The largest groups are the 'Active Potential SRR users' (32% or 13 million adults) and 'Unlikely users of SRRs' (25% or 10.4 million adults).

**Figure 3-1 – Distribution of adult population in England by market segment (%)**  
 Base: All respondents (1,787)



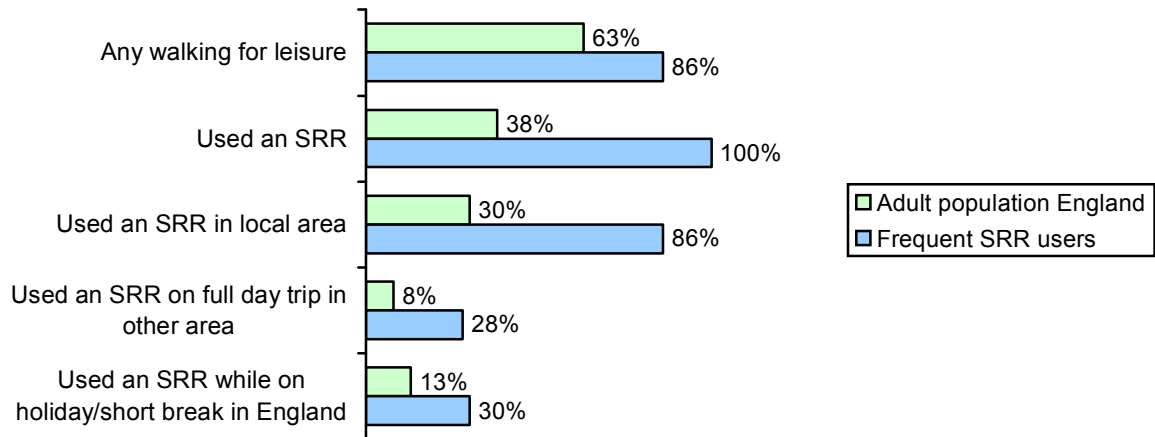
The following sections provide further details on the characteristics of each of these segments.

### 3.2 Frequent Strategic Recreational Route users – 15% of adult population

#### Leisure activity and use of routes

All use Strategic Recreational Routes on a weekly or more frequent basis. 34% use the routes to exercise a dog(s).

Figure 3-2 – Participation in walking and use of SRRs (%)



#### *Decision making*

Compared to other segments, more likely to rate *discovering somewhere new, a place where I can exercise to benefit my health, opportunities for circular walks, opportunities to learn something and a challenging route* as important when deciding where to walk.

#### *Awareness of Strategic Recreational Routes in local area*

91% are aware that there are SRRs in their local area.

#### *Reasons for using Strategic Recreational Routes*

More likely than infrequent users to choose to use SRR as it is *close to where they live, away from traffic and/or they can do a circular route*.

#### *Barriers to using Strategic Recreational Routes*

Compared to other members of the population, more likely to state that *nothing* prevents them from using routes as much as they want to or that they *would rather plan their own route or tend to just visit the same places*.

#### *Increasing use of Strategic Recreational Routes*

More likely than other segments to think that *improvements to path conditions (13%), more circular routes (10%), more challenging routes (7%) and better maps (9%)* would make them a lot more likely to use local SRRs. More likely to think that *more routes connecting interesting places (20%), accommodation discounts for frequent*

users (9%), access to reviews by other users (5%), more challenging, fairly remote routes (6%) and more long distance routes (5%) for trips of more than one day would make them a lot more likely to use SRRs during short breaks and holidays.

Demographic and media profile

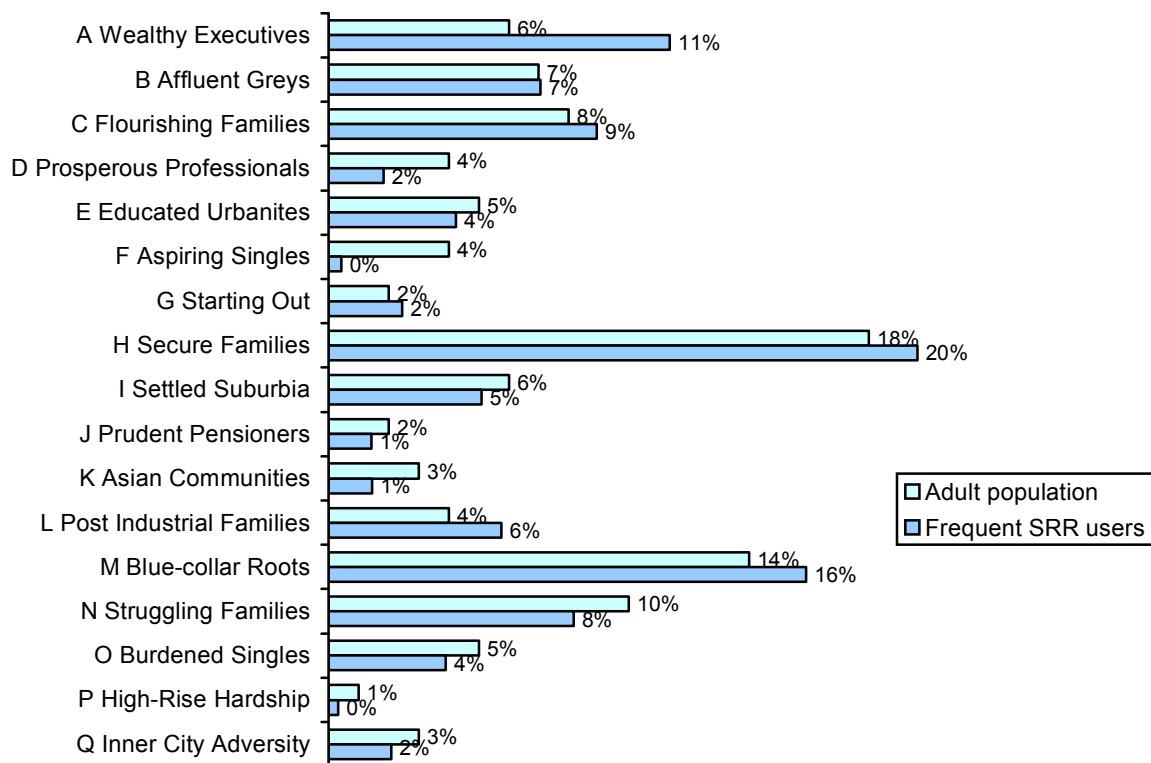
More likely than members of other market segments to be:

- Aged 55 to 64 (18%)
- White ethnic background (93%)
- Male (53%)
- Residents of a rural area (22%)
- Readers of The Times (11%), Guardian (10%), Financial Times (5%), Independent (7%), Sunday Times (7%).

Higher than average levels of Internet access (79%).

The chart below shows the profile of this segment by the 17 ACORN groups<sup>2</sup>. Members of this segment are somewhat more likely than members of the population in general to be classified as Wealthy Executives.

Figure 3-3 – Profile of segment by ACORN group (%)



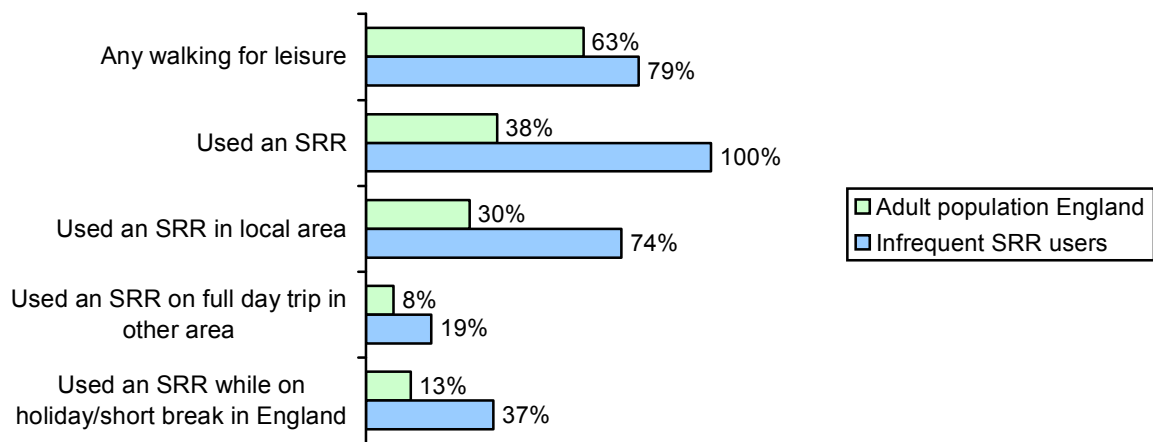
<sup>2</sup> See Appendices for further details of each ACORN group and full ACORN profile

### 3.3 Infrequent Strategic Recreational Route users – 23% of adult population

#### Leisure activity and use of routes

All use Strategic Recreational Routes, normally less often than weekly. More likely than other segments to have used a SRR during a holiday or short break in England (37%). 13% used route to exercise a dog(s). Most take part in walking for leisure.

Figure 3-4 – Participation in walking and use of SRRs (%)



#### *Decision making*

Compared to others, more likely to rate *information to help you plan your trip, public transport to and from the place you walk, a route suited to my ability and being able to buy refreshments (e.g. in a café or pub)* as important when choosing a place to take a walk.

#### *Awareness of Strategic Recreational Routes in local area*

90% are aware that there are SRRs in their local area.

#### *Barriers to using Strategic Recreational Routes*

Compared to other members of the population, more likely to state that a *lack of time/being too busy* prevents them from using routes as much as they want to.

#### *Increasing use of Strategic Recreational Routes*

More likely than others to think that *availability of parking on or near routes (11%), more circular routes (11%), fewer other people (6%) and more routes suited to their ability (8%)* would make them a lot more likely to use local SRRs. More likely than others to think that *more on-line information about routes (10%), information about*

accommodation and routes in one place (11%), walking and accommodation packages (8%), having someone to arrange trips (6%) and having people who can carry luggage from one place to the next (4%) would make them a lot more likely to use SRRs during holidays and short breaks.

Demographic and media profile

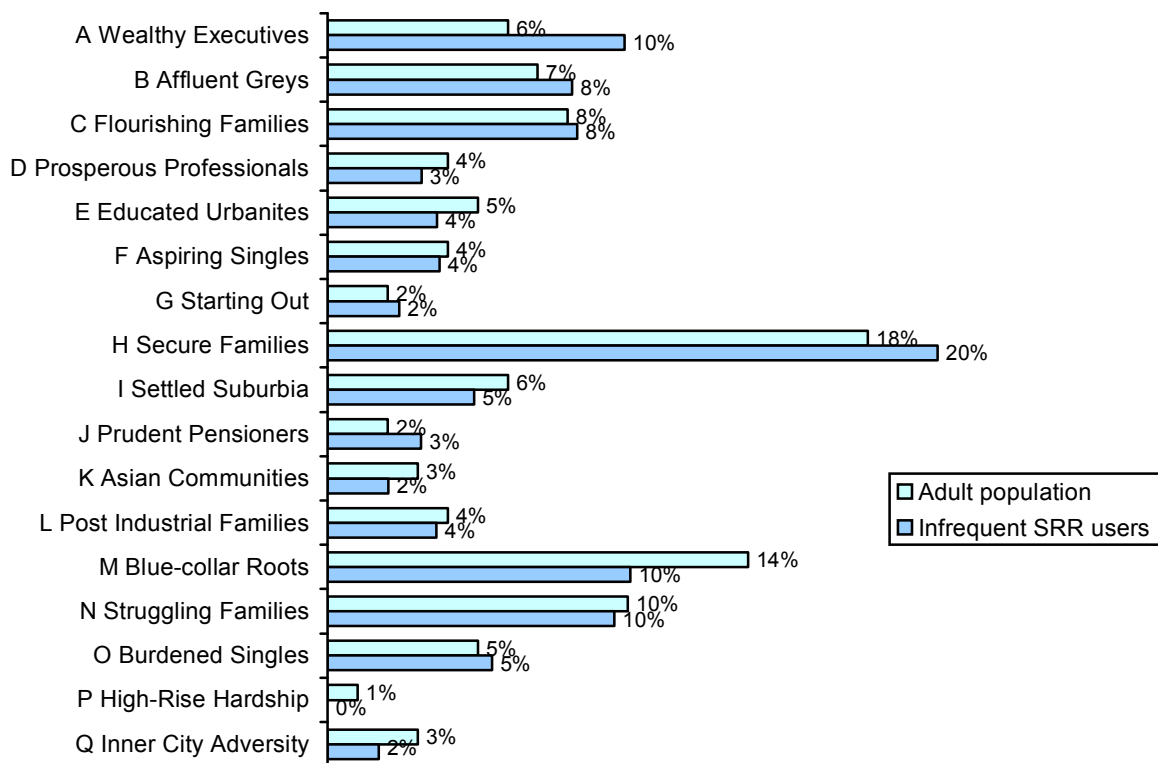
More likely than members of other market segments to be:

- Aged 45 to 54 (19%)
- In AB socio-economic groups (33%)
- Working full time (52%)
- Residents of a rural area (21%)
- Readers of Daily Telegraph (12%)

Higher levels of Internet access than amongst the other segments (83%).

The chart below shows the profile of this segment by the 17 ACORN groups<sup>3</sup>. Members of this segment are somewhat more likely than members of the population in general to be classified as Wealthy Executives or Secure Families.

Figure 3-5 – Profile of segment by ACORN group (%)



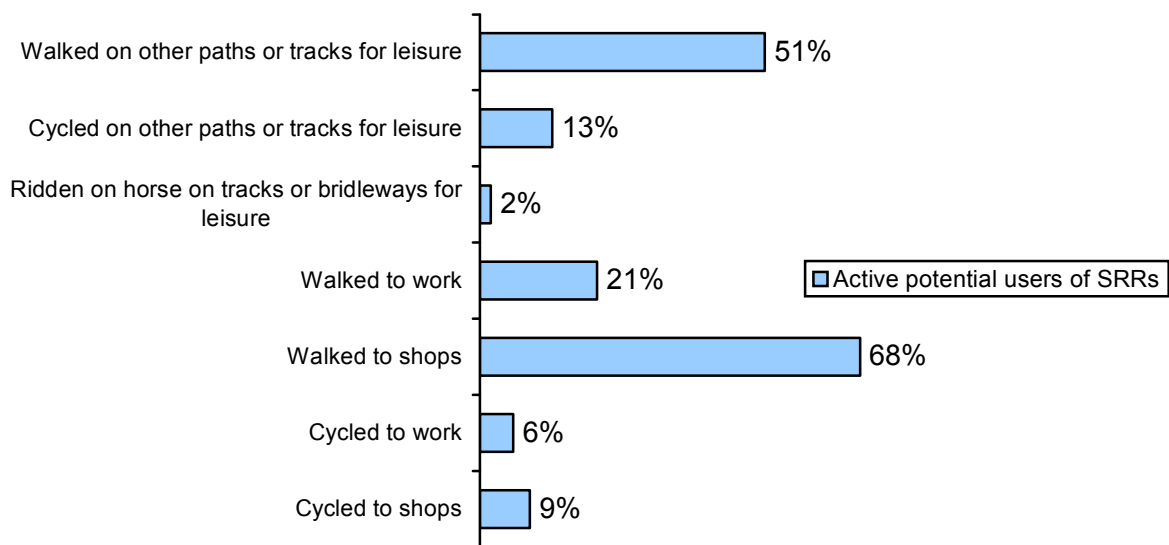
<sup>3</sup> See Appendices for further details of each ACORN group and full ACORN profile

### 3.4 Active potential users of Strategic Recreational Routes – 32% of adult population

#### Leisure activity and use of routes

None have used Strategic Recreational Routes but all have taken part in walking for leisure in last 12 months. Half had walked on other paths or tracks for leisure, 68% had walked to shops and 21% had walked to work.

Figure 3-6 – Participation in walking and use of SRRs (%)



#### *Decision making*

Generally, this segment rate fewer factors as relevant to choices of place to walk but most likely to *rate scenery and views, being away from traffic, places to sit and rest, relaxing and unwinding and feeling safe* as important.

#### *Awareness of Strategic Recreational Routes in local area*

26% are aware that there are SRRs in their local area.

#### *Barriers to using Strategic Recreational Routes*

Compared to other members of the population, more likely to state that a *lack of awareness of routes* in local area or a preference to plan own route prevents usage of SRRs.

#### *Increasing use of Strategic Recreational Routes*

More likely than other segments to state that more *on-line or printed information (10%) about routes, a better choice of routes in local area (12%) and better signposting (13%)* would encourage use of routes in local area. More likely than

others to think that *more information about routes where you can go for more than one day* (12%) would make them a lot more likely to use SRRs during holidays and short breaks.

Demographic and media profile

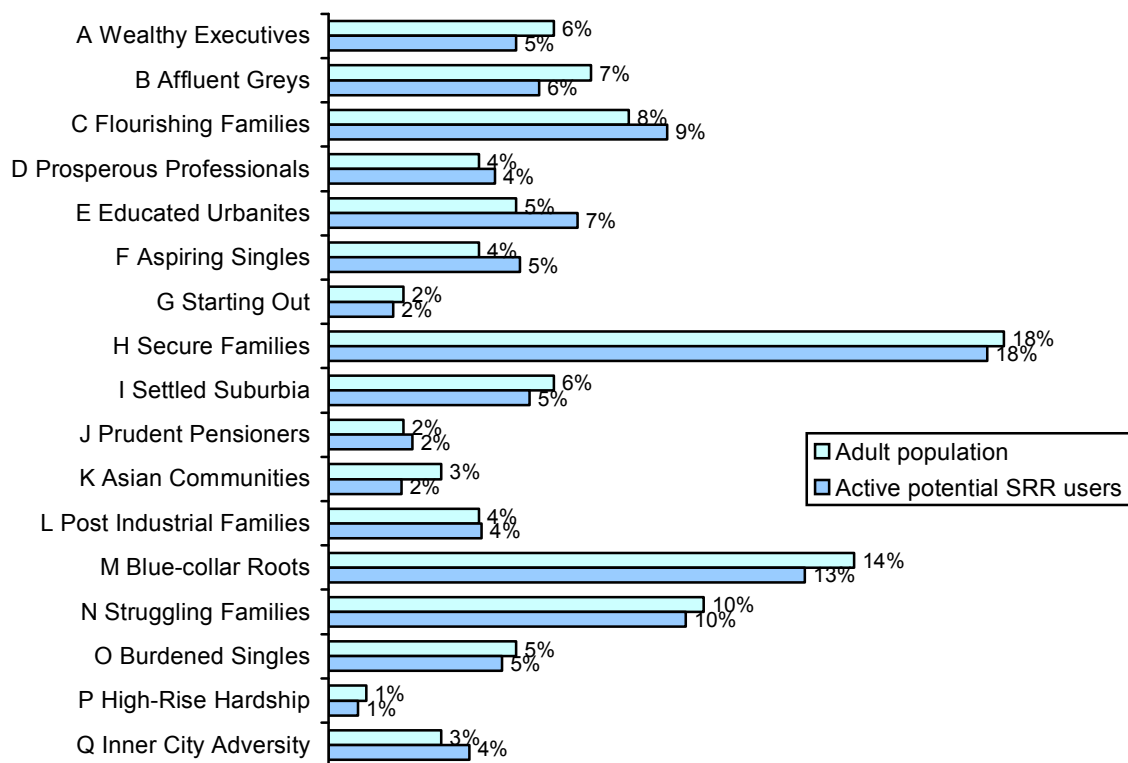
More likely than members of other market segments to be:

- Female (55%)
- Have children in household (34%)
- Working part time (14%)
- Read the Daily Mail (25%), The Sun (26%) and/or News of the World (14%).

Average levels of Internet access (73%).

The chart below shows the profile of this segment by the 17 ACORN groups<sup>4</sup>. In terms ACORN groups the profile of this segment is broadly similar to that of the population as a whole.

Figure 3-7 – Profile of segment by ACORN group (%)



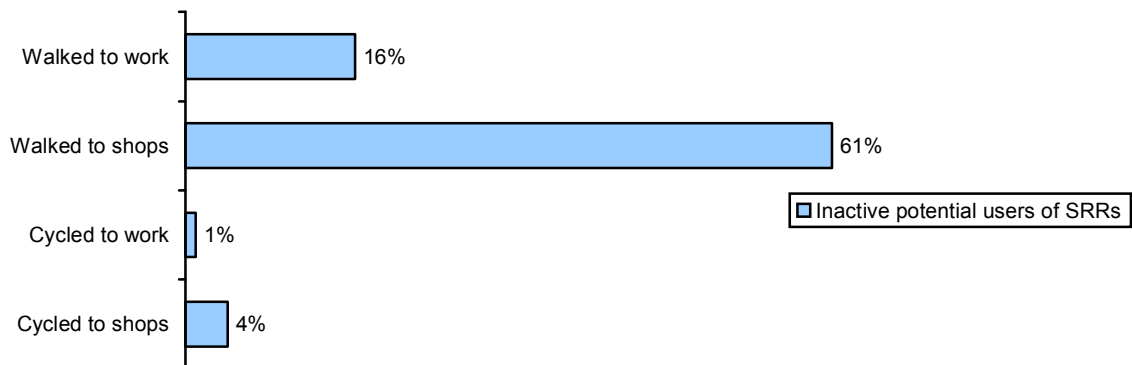
<sup>4</sup> See Appendices for further details of each ACORN group and full ACORN profile

## Inactive potential users of Strategic Recreational Routes – 5% of adult population

### Leisure activity and use of routes

None have used Strategic Recreational Routes and none have taken part in walking for leisure in last 12 months. However 61% have walked to shops and 16% have walked to work during this period.

Figure 3-8 – Participation in walking and use of SRRs (%)



### *Awareness of Strategic Recreational Routes in local area*

76% are aware that there are SRRs in their local area.

### *Barriers to using Strategic Recreational Routes*

Compared to other members of the population, more likely to state that *a lack of time/ being too busy, thinking that it 'sounds boring' or too challenging and not having access to a car* prevents usage of SRRs.

### *Increasing use of Strategic Recreational Routes*

More likely than other segments to state that *good places to eat or drink near paths (19%), better signposting (14%), more wheelchair and pushchair access (8%) and/or better maps (9%)* would encourage use of routes in local area.

More likely than others to think that *people acting as guides to show the way (5%), people who can carry luggage (4%) and/or someone to arrange trip for me (8%)* would make them a lot more likely to use SRRs during holidays and short breaks.

Demographic and media profile

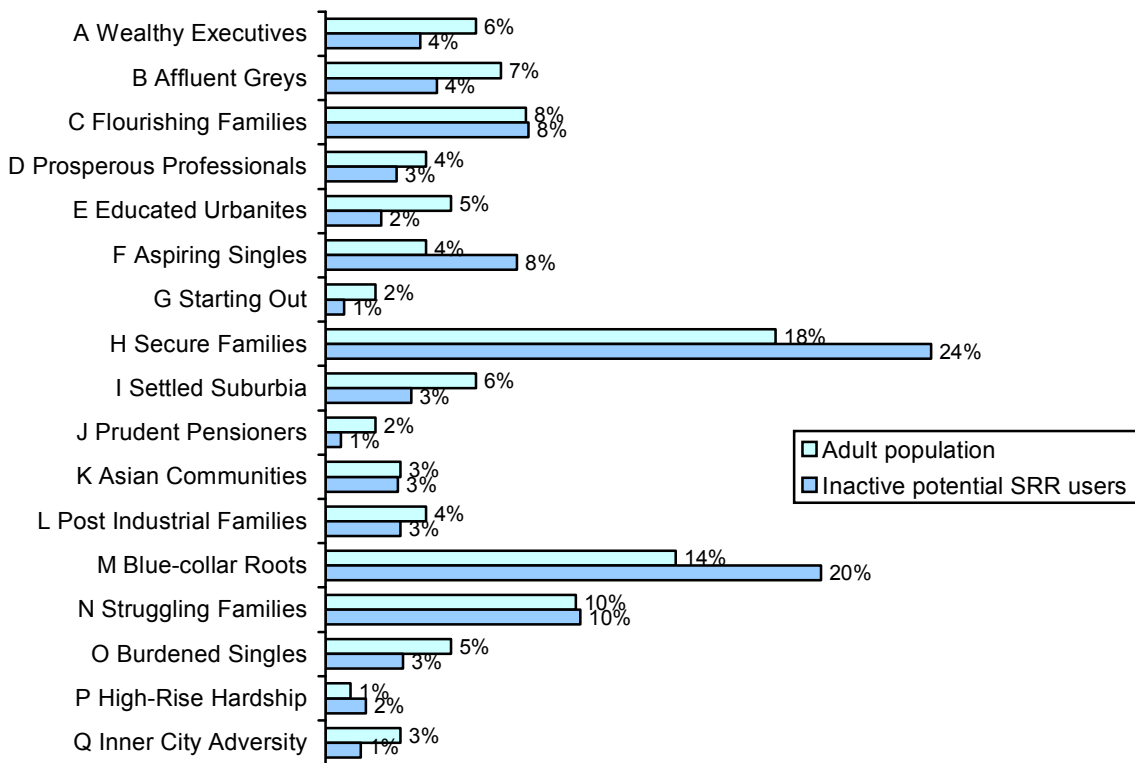
More likely than members of other market segments to be:

- Aged 16 to 34 (43%)
- Black or Minority Ethnic community (25%)
- Male (57%)
- C1 socio-economic group (41%)
- Read the Daily Express (8%), The Mirror (14%) or The Daily Star (4%)

Above average levels of Internet access (76%).

The chart below shows the profile of this segment by the 17 ACORN groups<sup>5</sup>. Members of this segment are more likely to be in the Aspiring Singles, Secure Families and Blue Collar Roots ACORN groups.

Figure 3-9 – Profile of segment by ACORN group (%)



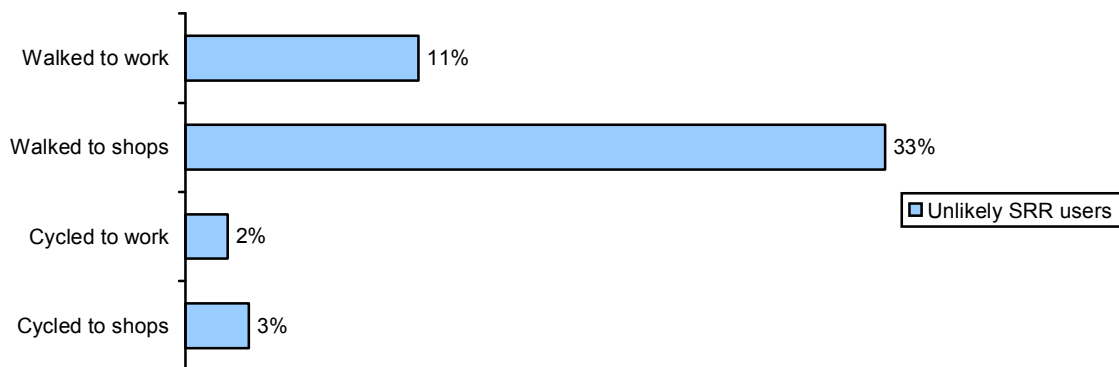
<sup>5</sup> See Appendices for further details of each ACORN group and full ACORN profile

### 3.5 Unlikely users of Strategic Recreational Routes – 25% of adult population

#### Leisure activity and use of routes

None have used Strategic Recreational Routes, none have taken part in walking for leisure in last 12 months and none have stated that anything would make them more likely to use routes in future. A third (33%) have walked to shops in last year and 11% have walked to work.

Figure 3-10 – Participation in walking and use of SRRs (%)



#### *Awareness of Strategic Recreational Routes in local area*

21% are aware that there are SRRs in their local area.

#### *Barriers to using Strategic Recreational Routes*

Most likely to state that *routes not being suited to ability* prevents use of SRRs.

#### *Increasing use of Strategic Recreational Routes*

State that nothing would encourage future use of routes or that they don't know what would encourage them to use them.

Demographic and media profile

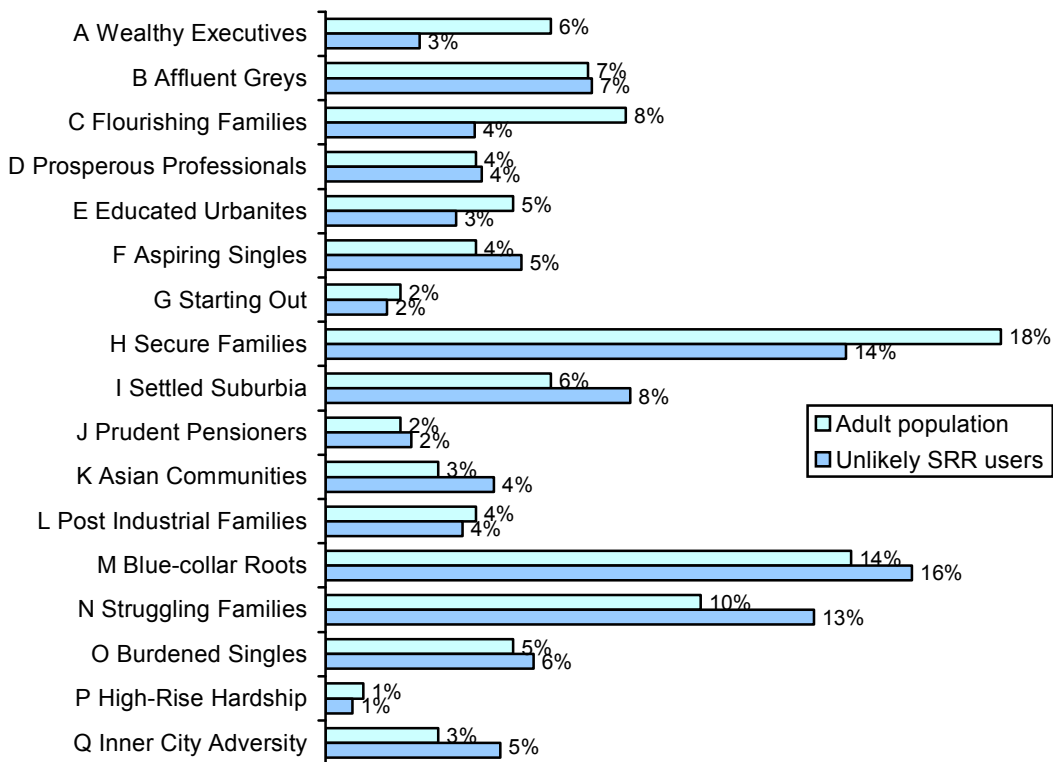
More likely than members of other market segments to be:

- Aged 65 or over (32%)
- No children in household (75%)
- DE socio-economic groups (34%)
- Residents of an urban area (91%)

Lower than average readership newspapers and lower than average levels of Internet access (58%).

The chart below shows the profile of this segment by the 17 ACORN groups<sup>6</sup>. Members of this segment are more likely to be in a number of the less affluent ACORN groups including Struggling Families and Inner City Adversity.

Figure 3-11 – Profile of segment by ACORN group (%)



<sup>6</sup> See Appendices for further details of each ACORN group and full ACORN profile

## 4. Summary of main findings and implications

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This section of the report provides a summary of the main findings and their implications for consideration by Natural England:

### Key Results

- Around three-fifths (63%) of the adult population in England took part in walking for leisure in the 12 months prior to the study, an estimated 26 million adults. Most took part in leisure walking on a monthly or more frequent basis (20 million adults).
- When people choose a place to walk, the most important triggers are the 'core' qualities of the destination as defined by the views and scenery (47% of people who have walked for leisure in the last 12 months), being able to get away from traffic (41%), personal safety (40%) and being able to relax and unwind (34%). The quality of the route is of secondary importance, as defined by well maintained paths (26%), places to sit and rest (25%), ease of parking (23%) and clear signposting (21%).
- 61% of the English adult population (25 million adults) were aware that Strategic Recreational Routes existed in England and around half of the population (52%) thought that there would be one or more of these routes in their local area. Awareness of routes is generally highest in areas where the supply is higher and this is particularly the case in rural areas. Awareness levels are also highest amongst the groups most likely to take part in walking including those aged 55 to 64, the AB socio-economic groups and people who are from a white ethnic background.
- Prompted recognition of the names of England's National Trails, from a list of 20 Strategic Recreational Routes from the UK and beyond, is relatively high. For example, Hadrian's Wall Path was recognised by 54% of the sample, compared with 9% recognising the Tarka Trail and 7% recognising the Icknield Way. However, unprompted recall of the names of all Strategic Recreational Routes (including National Trails) is much lower, for example only 3% provided the name of the Pennine Way and 1% provided the name of the Cleveland Way. This discrepancy suggests that the names of routes are not 'top of mind' for most people. Furthermore, respondents were much more

likely to be able to name local routes, reflecting their primary significance as local amenities.

- Around a quarter of the population (23%) perceived Strategic Recreational Routes as being ‘very important’ as places to visit either locally, on day trips and/or while on holiday (9.3 million adults). They were most likely to be perceived as being important as places to visit locally (18% very important for local use compared to 13% for use on day trips to other areas and 14% for use on holidays and breaks).
- 38% of the population claimed to have used one or more Strategic Recreational Routes in the 12 months prior to the survey (15.7 million adults). 15% of the population used these routes on a weekly basis. While 30% had used routes in their local area, 8% had used routes while on day trips to other areas and 13% had used routes while on a holiday or short break in England.
- Comparing people’s motivations for choosing a Strategic Recreational Route to their motivations for walking in general suggests that the ‘USPs’ of these routes include:
  - being away from traffic (a motivation for 49% of users)
  - being close to the homes of users (34% of users)
  - attractive scenery (34% of users)
  - circular routes (20% of users)
  - suited to a range of abilities (18% of users).

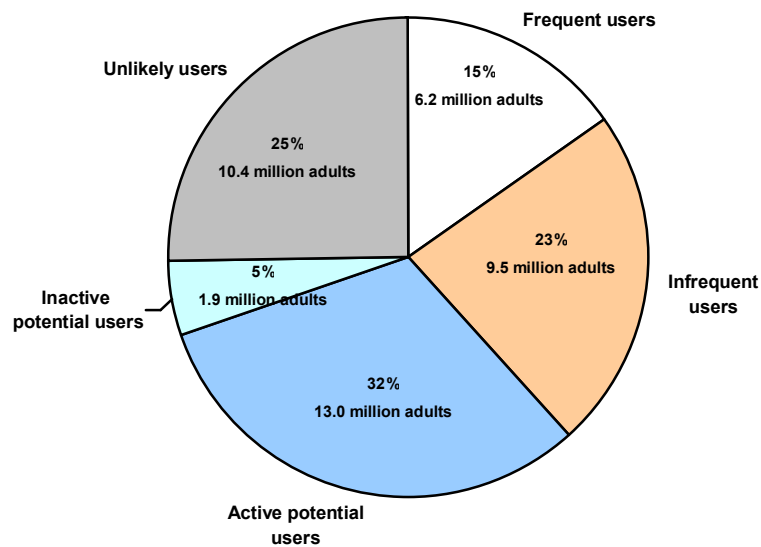
While being away from traffic and routes being suited to abilities were equally important to local users, day trip users and those who used routes during holidays, attractive scenery and the provision of circular routes were of most importance to day trip users, visiting places outside of their local area. Also, as would be expected, being close to home was particularly important to local users.

- The key reasons for *non-use* of Strategic Recreational Routes were a lack of time to take part in walking (24% of non-users), a lack of awareness of what routes are available locally (11% of non-users) and an inability to take part in walking (7% of non-users). Two-thirds (66%) of those who had not used a Strategic Recreational Route in the previous 12 months had undertaken walking for leisure elsewhere, walked to the shops and/or walked to work during this period.

## Market Segments

- This survey enables us to segment the population into a number of user and non-user groups, providing a framework for future marketing. There are five groups as illustrated in Figure 4-1 and these are described below:

**Figure 4-1 – Distribution of adult population in England by market segment (%)**  
Base: All respondents (1,787)



- 1) *Frequent users* – 15% of the population – likely to be affluent, aged 55 to 64. A large proportion live in rural areas and use routes as they are convenient and away from traffic. A large proportion are dog walkers. In general, members of this group use routes as much as they want to but local usage could be developed if path conditions were improved, more circular routes were available or more challenging routes were available. Interest in using routes while on breaks could be developed by providing more routes linking places of interest and/or more challenging routes.
- 2) *Infrequent users* – 23% of the population – likely to be aged 45 to 54, fairly affluent, working full time. Physically active but a lack of time is the main barrier to using routes more often. Information and finding a route suited to their ability is important when choosing a place to walk. Local use of routes could be developed if more parking was provided close to routes, more routes suited to their ability and/or

more circular routes were provided. Use during breaks could be developed by providing more information on what is available and making trips easy to arrange through packaging, etc.

- 3) *Active potential users* – 32% of population – likely to be of average affluence and in the family lifestage. Take part in leisure walking but do not use Strategic Recreation Routes. Low awareness of these routes, nationally and locally, is the key issue. Correspondingly, the provision of information and signposting would encourage local use where routes exist. Similarly more information on what is available would encourage more use of routes during breaks.
- 4) *Inactive potential users* – 5% of population – likely to be aged 16 to 34, in C1 socio-economic groups and in BME groups within the population. Members of this group do not take part in walking for leisure but may walk for other purposes (e.g. to work or shops). A key barrier to use of routes is a perception that it ‘sounds boring’. Also, concerns regarding routes being too challenging and difficult to reach without a car. Use could be developed by providing and/or promoting places to eat and drink on or near routes and/or people acting as guides to show them the way and things to see.
- 5) *Unlikely users* – 25% of the population – generally, older age groups and DE socio-economic groups. Very likely to live in urban areas. Members of this group do not walk for leisure and most do not walk for other purposes such as going to the shops. The key barrier to use of routes is limited or lack of ability to walk. All members of this group do not think anything would encourage them to use routes in the future.

## **Implications**

### *A large potential market*

There is a large existing market of Strategic Recreational Routes users within England (around 38% of adults used routes in the last 12 months) and a further third of the population (32%) take part in leisure walking but have not used a Strategic Recreation Route (the '*Active Potential Users*' segment).

*These groups provide the best potential for developing levels of use of Strategic Recreation Routes. Those who are already users of routes may be encouraged to use their local routes more often through facility improvements such as better path conditions, more parking and more circular routes. There is also potential to 'introduce' regular local users of routes to those in other areas, as the destinations of longer day trips or important elements of a holiday or short break.*

*In terms of the 'Active Potential Users' segment, the focus should be on increasing awareness of the availability of these routes with a focus on those in the potential user's local area (only 26% are currently aware).*

### *Understanding motivations*

When choosing a place to walk or ride, people consider their entire experience, especially the quality and safety of the environment and not just the physical condition of the trail or route. Only when the quality of the destination is right for them, does the quality of the trail or route itself become more important.

*In promoting Strategic Recreational Routes it is important to communicate how they can provide what potential users want – being away from traffic, convenience from home and providing an opportunity to walk or ride through attractive scenery. It is also important to recognise that different elements of the 'product' are more important to specific user types. For example, local users value proximity to their home most highly while those on a longer day out rate attractive scenery, circular routes and good pubs and cafés on route as more important.*

*Understanding the importance of these different factors to different user groups also has impacts upon site management. Maintaining the natural elements of a route, peace and quiet and perceptions of safety is critical for all users while the facilities provided such as seating and path surfaces vary in importance to different types of*

*user. It is therefore important for the managers of routes to be aware of their intended user profiles.*

#### *Developing local, day trip and holiday markets*

Building on the points made above, Strategic Recreational Routes are currently used most often by locals for fairly short, frequent walks. However, amongst a minority of the population, they are also seen as important resources as places to visit on longer day trips and holidays.

*Developing the use of routes for shorter walks on the user's 'doorstep' provides the greatest opportunities for increasing overall levels of physical activity amongst people who currently take part in little or no leisure walking. This would provide diversity and health benefits and is most likely to be obtained from the targeting of infrequent walking participants (in segments 3 'Active potential users' and 4 'Inactive potential users') with the primary aim of increasing awareness of routes locally, their quality (e.g. safety and suited to all abilities) and ease of accessibility.*

*Developing the use of Strategic Recreational Routes as destinations for longer day trips and use during overnight holidays and breaks could provide greater economic benefits to an area. Those who already use Strategic Recreational Routes are the 'best prospects' for developing this type of use (in segment 1 'Frequent users' and, to a lesser degree, segment 2 'Infrequent users'). Marketing to these groups should focus upon increasing awareness of the range of types of routes available in England – reinforcing the range of routes nationwide, especially those which link interesting places, more challenging routes and routes which can provide for a trip of more than one day. There is also potential to promote Strategic Recreational Routes to people who are already visiting an area or planning a trip. For example, by working with local accommodation providers to promote local routes in 'bedroom browsers' and providing on-line information on the websites of regional tourist boards.*

### An urban – rural ‘split’

The survey results suggest that there are some significant differences in levels of awareness and use of Strategic Recreational Routes amongst the residents of rural and urban areas. Residents of rural areas are somewhat more likely than those in an urban area to be aware of routes in their local area, to use these routes and to rate these routes as important.

*While these variations may, to some extent, reflect differences in the ‘supply’ of routes within urban and rural areas, it also suggests that there is greater scope to promote routes which are readily accessible from major urban areas. The profile of the five market segments reflects these variations with those in the two user segments more likely to live in rural areas.*

### Creating a brand

Given the opportunities for the increased promotion of Strategic Recreational Routes as integral parts of day trips outside of the local area and as the focus for activities on a holiday or short break, it could be beneficial to develop an SRR ‘brand’.

*Creating a brand would involve the development of a more consistent approach to the promotion of the various routes, reinforcing their unique values over other outdoor recreation destinations (nationwide, convenient, better scenery, circular routes, en-route pubs and cafes) and the ‘assurance’ of a high quality experience. Branding could be reinforced through the development of a brand identity (e.g.. a name and logo), a website and signage.*

### Using the market segments

*The five market segments provide a framework for developing the use of Strategic Recreational Routes. By understanding the profile and attitudes of each segment it will be possible to develop an action plan for each of these groups.*

*It may be beneficial to undertake more in-depth qualitative research amongst each of the segments or at least those with some potential to obtain a greater understanding of motivations and barriers to the use of routes and the appeal of potential marketing and product developments.*

## 5. Appendix

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### **Further details of each ACORN group (Source: ACORN User Guide)**

#### **A) Wealthy Executives**

These are some of the most affluent people in the UK. They live in wealthy, high status suburban, rural and semi-rural areas of the country. Houses tend to be large and detached with four or more bedrooms. Many are owned outright.

Households are a mix of middle-aged families, empty nesters and wealthy retired. They are very well-educated individuals with high levels of academic qualifications. Most are employed in senior managerial and professional occupations or are running their own businesses.

Car ownership is very high with most households having two or more cars, one of which is likely to be a high value company car.

Unsurprisingly, given their education and occupations, incomes are high as are levels of savings and investments. These consumers are financially sophisticated and purchase a wide range of financial products. They read the quality broadsheets and are likely to take two or more holidays a year.

In short, these are consumers with the money and the space to enjoy very comfortable lifestyles.

#### **B) Affluent Greys**

These people tend to be older empty nesters and retired couples. Many live in rural towns and villages, often in areas where tourism is important. Others live in the countryside where the economy is underpinned by agriculture.

The Affluent Greys are prosperous, live in detached homes and many have two cars. Employment is typically in managerial and professional roles. Given the rural locations, there is also a significant number of farmers.

These are high income households and even those that have retired have good incomes. The majority own their homes outright, and with no mortgage to pay are able to invest their money in a wide range of financial products. In their leisure time they enjoy gardening and golf. They appreciate good food and wine, and will go on regular holidays.

These older, affluent people have the money and the time to enjoy life.

#### **C) Flourishing Families**

These are wealthy families with mortgages. They live in established suburbs, new housing developments around commuter towns and villages and rural areas. Houses tend to be detached or larger semi-detached properties, often with four bedrooms.

While these are generally family areas, there are also some empty nesters and better-off retired couples. Flourishing Families are younger than other affluent groups, so most households are still likely to be making mortgage repayments. Incomes are good since many have managerial and professional occupations. Many will have cars, pensions and health cover provided by their employer. Car ownership is high and most of these families will have two or more cars. These families are usually financially secure with a variety of savings and investments.

They take regular holidays, including long haul, skiing and summer sun. Some people are quite active, enjoying sports, playing golf or going to the gym. A number enjoy the countryside

through activities such as walking or birdwatching. Taking the family to the cinema is also a favourite pastime.

PC ownership is common and they are comfortable with new technology.

These are high income achievers, successfully juggling both jobs and families.

#### **D) Prosperous Professionals**

These are the most prosperous people living in our main cities. They are very well educated and tend to be employed in senior managerial and professional occupations. Households are a mix of families, couples, singles and some retired.

Given the urban nature of these areas, property is a mix of terraced and detached houses, and converted and purpose built flats. The houses tend to be large, with four or more bedrooms. Some of the flats are occupied by young professionals sharing. Over 80% of the housing is owner occupied.

These are affluent neighbourhoods so car ownership is high, even if travel to work is often by public transport. Incomes are high and these individuals have high levels of savings and investments. Technologically sophisticated, they regularly use the Internet for financial services, as well as buying other products and services.

They read the major broadsheets and have a cosmopolitan outlook, being interested in theatre, the arts, classical music and eating out in good restaurants.

Having chosen an urban lifestyle, these consumers have the money and education to make the most of what our big cities have to offer.

#### **E) Educated Urbanites**

These young people are highly qualified. The majority live in flats in our major cities.

Most are in professional and managerial roles and many are working hard to further their careers. They have high incomes, and those that have been working for some time will be buying their flats and making other financial investments. The others are renting and have high disposable incomes.

The one significant purchase they may make is an expensive car. However, many prefer to use public transport, particularly for travelling to work.

Educated Urbanites take full advantage of living in the city and go out regularly. They enjoy restaurants and bars and are interested in the theatre and the arts. They are well informed about current affairs and are keen readers of The Guardian, Financial Times and Independent.

This group will spend significant amounts on travel and take frequent holidays. They are very likely to go on long haul trips and will either ski or seek the sun in the winter.

These young people have the world at their feet and plenty of money to enjoy it.

#### **F) Aspiring Singles**

Aspiring Singles are young and live in urban or suburban locations, frequently around London. There are large numbers of both students and well qualified young people who have recently finished their studies and started working.

Many live in rented flats, both purpose built and converted. The flats tend to be small, typically one or two bedrooms, and be located in basements or above shops. While many single

people live alone, there are also people sharing larger properties such as terraced houses. These are quite mobile populations with a high turnover of residents.

People lead urban lifestyles. They are active, participating in sports and going to the gym. Like most young people, they enjoy going out with friends to pubs and clubs in the evenings, or to coffee shops during the day.

Cars are relatively rare so transport is by bus, train, tube, or walking.

They are highly confident with new technology and are likely to be regular users of the Internet for a wide range of purposes.

Readership of liberal broadsheet newspapers such as The Guardian, Independent and Observer is high.

Many of these active young people are likely to develop well-paid careers in the future.

### **G) Stating Out**

These are young adults, many just starting out on their careers. They are in their 20s and early 30s. There are a lot of students and young singles in their first jobs, as well as young couples and some young families with children under five.

Housing is a mix of smaller terraced houses, with two or three bedrooms, and converted and purpose built flats. Many of the houses are being bought on a first mortgage but renting from private landlords is also common. Many of the students and young single professionals in this group will be house or flat sharers.

Most of the individuals are well educated to A-level and degree standard. They will often be employed in lower managerial, professional and clerical occupations, and are on the first rungs of the corporate ladder. Most of the women in this group work full time.

Most households have a car, with some having two. Incomes tend to be good and levels of savings and investments are above the national average.

They enjoy sport and exercise and are likely to visit the gym regularly. Leisure time is also spent watching cable TV, going to pubs and restaurants and listening to music. The Guardian, Independent and Observer are popular newspapers.

These young people are just starting out but have the education and ambition to succeed in life.

### **H) Secure Families**

This group comprises home owning families living comfortably in suburban and semi-rural locations. They mainly live in three bedroom semi-detached homes. Families might include young children, teenagers or even young adults who have not yet left home. These areas will also include some empty nesters.

Within this group, there are also some neighbourhoods with high numbers of comfortably off Asian families.

People are employed in a range of occupations, including middle management and clerical roles. There are also reasonable numbers of shopworkers and skilled manual workers. Incomes are at least of average levels and many earn well above the national average.

Most people in this group have some savings and would consider themselves financially prudent. The more affluent will have good company cars and will have built up somewhat greater levels of savings and investments.

These are the stable suburban families that make up much of middle Britain.

### **I) Settled Suburbia**

These established communities are made up of empty nesters and retired older couples. Property tends to be two and three bedroom semi-detached houses and bungalows. Many own their homes outright.

The working population are in a mix of lower management, supervisory, manufacturing and retail jobs. They earn modest salaries and significant numbers of women work part-time to boost the overall household income. Given that their children tend to have left home and they have very little mortgage to pay, many will have a reasonable disposable income.

They may also have some investments for security in their old age.

They like to go on holiday and will typically enjoy UK and European holidays, in both winter and summer. For many, gardening is their most important activity.

While most people get their news from TV, the Daily Mail is the most popular newspaper.

These people have managed their incomes well, and have adequate financial resources to feel confident and secure about the future.

### **J) Prudent Pensioners**

These are comfortably off retired people found in many seaside towns and elsewhere around the country. There are many over 75s as well as younger retired people. A lot of the households are pensioner couples or singles. Retirement homes are also common.

Much of the housing in these areas is flats, either converted or low rise purpose built. Many are owner occupied and often of high value; others are privately rented. Holiday homes are also common.

Residents tend to be well educated, and employment for those who are not retired tends to be in managerial and professional occupations.

Most of the people in this group have a comfortable standard of living, having provided for their old age with above average levels of savings and investments.

Although predominantly of retirement age, householders are far from inactive. They are prepared to take on charity and voluntary work and show a marked propensity to be members of bodies such as the National Trust. Many have an interest in fine art and antiques.

These sophisticated senior citizens are both financially smart and socially active. They have ensured that they will enjoy a relaxed and refined retirement.

### **K) Asian Communities**

These are urban areas where the concentration of Asian families is a key characteristic. These young families live in the terraced streets of many major cities, including Birmingham, Bradford and London.

There are lots of children in these families and these areas feature the highest levels of children under the age of five.

Qualification levels tend to be low and unemployment levels are high. People typically work in routine manual roles or in the retail sector.

However most women tend to be at home bringing up their young families. With low incomes and large families to support there is little discretionary

spend. They rarely go on holiday and rely on home-based entertainment, perhaps subscribing to cable TV to extend their viewing choice.

For many, religion is very important and plays a major role in their social and family lives.

Like all young families, these Asian Communities are striving to create a bright future for their children.

### **L) Post-Industrial Families**

Twenty years ago, these would have been traditional blue-collar areas. Now, with the decline of heavy industry, people are quite likely to work in office or clerical jobs and in shops.

Most households are traditional families with school age children. They generally live in three bedroom terraced houses, which tend to be at the cheaper end of the housing market. Most families are owner occupiers, but a number rent their houses from the local council.

Incomes are more likely to be around the national average. Spending on credit cards is low and people are careful with their money. Mortgages are often covered by a mortgage protection policy and levels of remortgaging are high. Many will also switch utility providers in order to get the best deal. Most families can afford to run a car and to take a holiday every year, often a packaged holiday to the Mediterranean. Cable and satellite TV is popular as are sports like football and rugby.

These are cautious consumers who are successfully adapting to the changing nature of employment in the UK.

### **M) Blue-Collar Roots**

These are communities where most employment is in traditional blue-collar occupations. Families and retired people predominate with some young singles and single parents.

Most property is two or three bedroom terraced housing. Many are being bought on a mortgage although renting from private landlords, local authorities and housing associations is common in some areas.

Levels of educational qualifications tend to be low. Most employment is in factory and other manual occupations. There are many shopworkers as well. Incomes range from moderate to low and unemployment is higher than the national average, as is long term illness. There are pockets of deprivation in this group.

Car ownership is below the national average, and cars tend to be lower value and often bought second hand. Some of the better off areas within this group have modest levels of savings and investments, but many find it hard to save regularly from modest incomes. There are some households with high levels of debt.

The tabloid press is favoured reading and other interests include camping, angling, bingo and horseracing, as well as watching cable TV and going to the pub.

These people have a modest lifestyle but most are able to get by.

### **N) Struggling Families**

These are low income families living on traditional low-rise estates. Some have bought their council houses but most continue to rent.

Estates will usually be either terraced or semi-detached. Two bedroom properties are more typical but the larger families may be housed in three bedroom properties. Either way there may be an element of overcrowding. On some estates there are high numbers of single parents while on others there are more elderly people, some with long-term illness.

Incomes are low and unemployment relatively high. Jobs reflect the general lack of educational qualifications and are in factories, shops and other manual occupations.

There are fewer cars than most other areas. Money is tight and shopping tends to focus on cheaper stores and catalogues.

Visiting the pub, betting, football pools, bingo and the lottery are the principal leisure activities.

These families share the twin disadvantages of educational under achievement and consequent lack of opportunity. They are struggling to get by in an otherwise affluent Britain.

### **O) Burdened Singles**

This urban group is characterised by high numbers of single adults. These include single pensioners, young singles and lone parents.

They tend to live in purpose built flats or small terraced houses, the majority of which are rented from the council or a housing association.

The working population is employed in routine, manual and retail occupations. However, with high numbers of pensioners and single parents, many people are not working and the overall level of household income is very low. Unemployment levels are above average and long term illness levels are high, which reflects the relatively high numbers of older people.

With such low incomes, these households have little, if any, discretionary spend. They are unlikely to have cars and rely on public transport. Leisure activities are very limited and will include going for the occasional drink, playing bingo and placing a bet at the bookies.

Life for this group is undoubtedly difficult, with restricted finances and employment opportunities. For most, there is little realistic chance of immediate improvement.

### **P) High-Rise Hardship**

These communities have very high numbers of older residents, especially over 65s. There are very few traditional families and middle-aged people. There are also fewer children in this group overall, although some areas contain high numbers of single parents with children under five. Over 60% of households contain only one adult. These can be single people, single pensioners or lone parents.

Over 75% of households live in purpose built flats, mostly rented from the local authority or housing associations. Flats are small, usually one or two bedrooms, and often in high-rise blocks. There are very low levels of owner occupation.

These are relatively deprived neighbourhoods, containing some of the UK's highest levels of unemployment and long-term illness. Those in work are likely to be employed in manual and factory jobs or work in shops.

Educational qualifications, incomes and car ownership are all low. Leisure interests include football, horse racing, bingo and going to the pub. The tabloids are favoured reading.

These people are enduring hardship and for them, life is a struggle.

### **Q) Inner City Adversity**

These are densely populated urban areas with a young multi-ethnic population, primarily in and around London. 25% of the population is black and 14% is Asian. Households are typically young singles and young families, often single parent.

They live in small flats in purpose built blocks, normally rented from the council or housing association.

Unemployment levels are almost double the national average, and the working population is employed in routine, manual occupations. There is also a significant student population. Household incomes are very low with many earning less than £10,000 per annum. There is little money left for discretionary spending, particularly for those with young families. Car ownership is very low and everyone is dependent on public transport.

Like other young people they are interested in music, football and fashion. For many their religion is also very important. They are interested in current affairs, and whilst The Sun and Daily Mirror are popular, significant numbers read The Guardian and The Independent.

These young multi-ethnic communities maintain a sense of vibrancy despite obvious hardship.

## 1) ACORN category by market segment – percentage profile

		Frequent SRR users	Infrequent SRR users	Active potential SRR users	Inactive potential SRR users	Unlikely users of SRRs
1	Wealthy mature professionals, large houses	1%	0%	0%	0%	1%
2	Wealthy working families with mortgages	4%	2%	1%	0%	0%
3	Villages with wealthy commuters	2%	1%	1%	0%	0%
4	Well-off managers, larger houses	5%	6%	3%	4%	2%
5	Older affluent professionals	2%	1%	0%	2%	1%
6	Farming communities	2%	1%	1%	3%	0%
7	Old people, detached homes	0%	2%	1%	0%	0%
8	Mature couples, smaller detached homes	4%	4%	3%	0%	5%
9	Older families, prosperous suburbs	1%	2%	2%	3%	1%
10	Well-off working families with mortgages	3%	3%	4%	3%	1%
11	Well-off managers, detached houses	5%	3%	3%	2%	1%
13	Large families and houses in rural areas	0%	0%	1%	0%	1%
14	Well-off professionals, larger houses and converted flats	2%	3%	3%	3%	4%
15	Older professionals in suburban houses and apartments	0%	2%	1%	1%	1%
16	Affluent urban professionals, flats	2%	0%	2%	1%	1%
17	Prosperous young professionals, flats	1%	0%	1%	0%	0%
18	Young educated workers, flats	1%	1%	2%	0%	1%
19	Multi-ethnic young, converted flats	1%	0%	1%	0%	1%
20	Suburban privately renting professionals	0%	1%	1%	2%	0%
21	Student flats and cosmopolitan sharers	0%	2%	1%	4%	3%
22	Singles and sharers, multi-ethnic areas	0%	1%	3%	2%	2%
24	Low income singles, small rented flats	1%	1%	1%	1%	1%
25	Student terraces	1%	2%	1%	0%	1%
26	Young couples, flats and terraces	5%	4%	2%	2%	2%
27	White-collar singles/sharers, terraces	3%	3%	4%	4%	3%
28	Younger white-collar couples with mortgages	4%	5%	3%	3%	2%
29	Middle income, home owning areas	6%	6%	5%	8%	3%
30	Working families with mortgages	2%	2%	2%	4%	2%
31	Mature families in suburban semis	0%	1%	2%	3%	2%
32	Established home owning workers	0%	1%	0%	2%	1%
33	Home owning Asian family areas	1%	3%	3%	2%	4%
34	Retired home owners	4%	1%	2%	0%	4%
35	Middle income, older couples	0%	0%	0%	0%	0%
36	Lower incomes, older people, semis	1%	3%	2%	1%	1%
37	Elderly singles, purpose built flats	0%	0%	0%	0%	1%
38	Older people, flats	1%	2%	2%	3%	4%
39	Crowded Asian terraces	5%	3%	2%	2%	3%
40	Low income Asian families	1%	1%	2%	1%	1%
41	Skilled older families, terraces	5%	4%	5%	3%	6%
42	Young working families	8%	5%	5%	15%	7%
43	Skilled workers, semis and terraces	3%	1%	3%	1%	3%
44	Home owning families, terraces	2%	2%	1%	2%	2%
45	Older people, rented terraces	2%	5%	2%	3%	4%
46	Low income larger families, semis	1%	0%	0%	0%	0%
47	Low income, older people, smaller semis	1%	2%	2%	5%	3%
48	Low income, routine jobs, terraces and flats	3%	1%	2%	1%	2%
49	Low income families, terraced estates	0%	0%	2%	0%	1%
50	Families and single parents, semis and terraces	2%	4%	2%	0%	2%
51	Large families and single parents, many children	2%	1%	3%	2%	3%
52	Single elderly people, council flats	0%	0%	0%	1%	0%
53	Single parents and pensioners, council terraces	0%	0%	1%	2%	1%
54	Families and single parents, council flats	0%	0%	0%	0%	0%
55	Old people, many high-rise flats	1%	1%	2%	0%	2%
56	Singles and single parents, high-rise estates	1%	1%	1%	1%	3%

## 2) ACORN category by market segment – by index compared to population profile (i.e. 1 = same proportion to population, over 1 = higher proportion).

		Frequent SRR users	Infrequent SRR users	Active potential SRR users	Inactive potential SRR users	Unlikely users of SRRs
1	Wealthy mature professionals, large houses	2.65	0.94	0.38	0.00	1.04
2	Wealthy working families with mortgages	2.49	1.39	0.80	0.00	0.19
3	Villages with wealthy commuters	1.94	1.41	1.20	0.00	0.00
4	Well-off managers, larger houses	1.32	1.73	0.73	1.06	0.47
5	Older affluent professionals	1.65	1.38	0.36	1.71	0.94
6	Farming communities	1.35	0.87	1.25	2.23	0.36
7	Old people, detached homes	0.23	2.07	1.30	0.00	0.28
8	Mature couples, smaller detached homes	0.98	1.05	0.71	0.00	1.51
9	Older families, prosperous suburbs	0.41	1.13	1.19	1.57	0.89
10	Well-off working families with mortgages	1.00	1.09	1.38	1.11	0.42
11	Well-off managers, detached houses	1.77	1.10	1.04	0.81	0.44
13	Large families and houses in rural areas	0.00	0.64	1.74	0.00	1.18
14	Well-off professionals, larger houses and converted flats	0.60	0.91	1.14	0.94	1.16
15	Older professionals in suburban houses and apartments	0.00	2.03	0.93	0.94	0.76
16	Affluent urban professionals, flats	1.53	0.38	1.44	1.17	0.66
17	Prosperous young professionals, flats	1.68	0.69	1.62	0.00	0.29
18	Young educated workers, flats	0.41	0.76	1.66	0.00	0.93
19	Multi-ethnic young, converted flats	1.64	0.00	1.63	0.00	0.92
20	Suburban privately renting professionals	0.46	1.47	1.26	1.75	0.42
21	Student flats and cosmopolitan sharers	0.00	0.86	0.74	2.40	1.79
22	Singles and sharers, multi-ethnic areas	0.00	0.53	1.74	1.18	1.06
24	Low income singles, small rented flats	1.46	0.77	1.14	0.79	0.81
25	Student terraces	1.12	1.67	0.68	0.00	0.91
26	Young couples, flats and terraces	1.48	1.33	0.73	0.73	0.79
27	White-collar singles/sharers, terraces	0.90	0.92	1.17	1.18	0.88
28	Younger white-collar couples with mortgages	1.31	1.41	0.83	1.01	0.65
29	Middle income, home owning areas	1.20	1.20	0.97	1.70	0.60
30	Working families with mortgages	0.84	0.80	1.18	1.86	0.89
31	Mature families in suburban semis	0.28	0.82	1.16	1.98	1.22
32	Established home owning workers	0.00	1.63	0.65	3.01	1.09
33	Home owning Asian family areas	0.50	1.15	0.88	0.61	1.39
34	Retired home owners	1.54	0.28	1.03	0.00	1.48
35	Middle income, older couples	0.00	4.33	0.00	0.00	0.00
36	Lower incomes, older people, semis	0.80	1.58	0.98	0.35	0.73
37	Elderly singles, purpose built flats	0.00	0.32	1.09	0.00	2.29
38	Older people, flats	0.56	0.78	0.75	1.13	1.75
39	Crowded Asian terraces	1.63	0.96	0.75	0.80	1.01
40	Low income Asian families	0.80	0.69	1.74	0.50	0.57
41	Skilled older families, terraces	0.97	0.80	1.00	0.68	1.26
42	Young working families	1.24	0.78	0.78	2.39	1.08
43	Skilled workers, semis and terraces	1.35	0.50	1.20	0.50	1.08
44	Home owning families, terraces	1.03	1.11	0.77	1.10	1.14
45	Older people, rented terraces	0.57	1.49	0.66	0.90	1.26
46	Low income larger families, semis	0.00	0.00	0.71	0.00	0.00
47	Low income, older people, smaller semis	0.27	0.70	1.09	2.04	1.40
48	Low income, routine jobs, terraces and flats	1.63	0.55	0.89	0.32	1.30
49	Low income families, terraced estates	0.00	0.00	1.97	0.00	1.48
50	Families and single parents, semis and terraces	0.72	1.91	0.70	0.00	0.90
51	Large families and single parents, many children	0.91	0.43	1.21	0.75	1.36
52	Single elderly people, council flats	0.00	1.44	0.00	9.15	0.93
53	Single parents and pensioners, council terraces	0.68	0.00	1.34	3.37	1.24
54	Families and single parents, council flats	0.00	0.00	1.91	0.00	1.55
55	Old people, many high-rise flats	0.75	0.35	1.47	0.00	1.33
56	Singles and single parents, high-rise estates	0.58	0.73	0.89	0.91	1.65

## Additional analysis of results regarding factors which would increase use of SRRs

### a) Factors which would increase local use

	<b>Frequent SRR users</b>	<b>Infrequent SRR users</b>	<b>Active potential SRR users</b>	<b>Inactive potential SRR users</b>	<b>TOTAL</b>
Information	36%	32%	33%	42%	34%
Quality of resource	26%	27%	24%	27%	25%
Services	20%	25%	20%	29%	22%
Product improvements/changes	20%	19%	11%	12%	15%

### b) Factors which would increase use outside of local area

	Frequent SRR users	Infrequent SRR users	Active potential SRR users	Inactive potential SRR users	TOTAL
Information	28%	32%	27%	21%	29%
Services	20%	19%	14%	22%	17%
Product improvements/changes	25%	15%	13%	15%	16%
Quality of resource	6%	8%	6%	4%	7%