

1. Summary of main findings and implications

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).

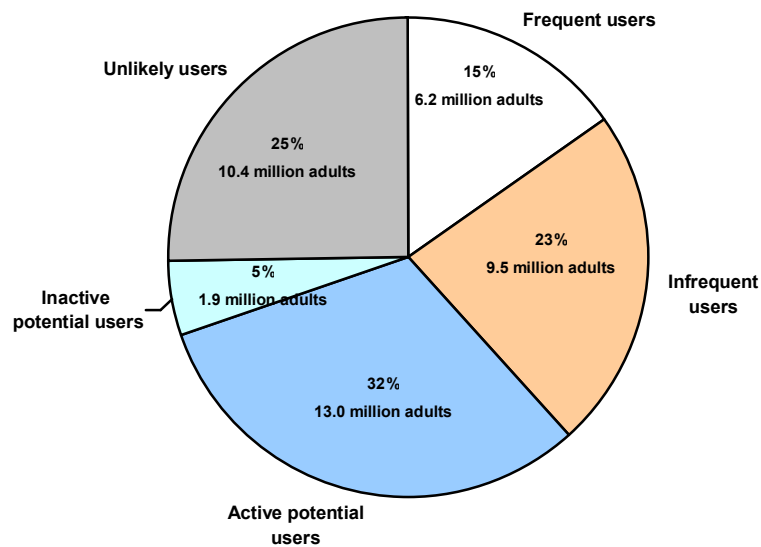
While being away from traffic and routes being suited to abilities were equally important to local users, day trip users and those who used routes during holidays, attractive scenery and the provision of circular routes were of most importance to day trip users, visiting places outside of their local 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.

2. Appendix

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

	Frequent SRR users	Infrequent SRR users	Active potential SRR users	Inactive potential SRR users	TOTAL
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%