



HenleyCentreHeadlightVision

Appendix B: Potential drivers of change in outdoor recreation to 2020

A report for Natural England's
outdoor recreation strategy

Figure 1: List of drivers of change in outdoor recreation reviewed

	Social	Technological	Economic	Environmental	Political	Organisational
Macro	Increasing ethnic diversity	Increase in household communications and IT	Increasingly affluent society	Sustainable communities	Priorities in public spending (and policy)	Growing tensions of transport infrastructure
	Ageing population		Influence of large leisure providers	Integration of conservation with recreation	Rise of single issue politics	Road safety
	Changing demographics		Olympics 2012	Changing urban landscape	Future of planning structures	Changes in land use
	Decrease in traditional households		Investment in outdoor facilities	Global warming	Diversification and CAP reform	
	Dominance of urban lifestyles (Urbanisation of culture)		Increasing cost on public health			
	Changing populations (density)					
Meso	Changing lifestyles of children and young people	Networked society	Increasing spend on leisure		Drive to greater physical activity and health	Fragmentation of leisure
	Changing working patterns		Increasing income disparities		Social inclusion	Increasing access
	Declining mental health				Influence of lobby groups / NGOs	Increased availability of information
	Rise in the public spirit				Declining public health outcomes	
	Rise of the empowered consumer					
	Experience economy					
	Entitlement					
	Convenience culture					
Micro	Risk averse society			Greater awareness of environmental concerns		Personal transport demand
	Retuned to nature					
	Wellbeing					
	Time and energy deficit					
	Communal yearning					

Key:

	Main body of drivers emerging from the desk research and executive interviews
	Drivers emerging from the two workshops
	Drivers added during the mapping process as commentary to the main body of drivers