



Ipsos-Eureka
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Nature-based outdoor recreation demand and preferences – Quantitative research findings

North Tablelands

Prepared for Parks and Wildlife Group, NSW Department of
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This section outlines the
key findings from the research

EXECUTIVE SUMMARY

Research context

The current NSW State Plan has set the Parks and Wildlife Group (PWG) of the NSW Department of Environment and Climate Change and Water (DECCW) the target of increasing the number of visits to National Parks by 20% between 2006 and 2016. Meeting this target will require increasing the frequency with which locals and tourists currently access parks, as well as increasing the number of new users. Facilitating and managing such an increase poses significant planning, management, and marketing challenges.

The objective of this research is to explore the preferences, motivations and barriers in relation to participation in nature-based outdoor recreation. This includes obtaining data on current demand, as well as forecasts for the future, in order to identify the types of experiences and locations in which PWG should supply new nature-based outdoor recreation opportunities and the ways in which it should manage existing opportunities.

Research design

A questionnaire was developed on the basis of results of the exploratory qualitative phase of this research, and in close consultation with PWG. This survey measured current behaviour, interests, preferences, barriers and motivations in relation to a range of nature-based outdoor recreation experiences in different settings. It should be noted that current behaviour, interests, barriers and motivations were investigated in relation to nature-based outdoor recreation generally, not just in relation to activities carried out in National Parks, whilst preferences were investigated in relation to activities undertaken in a 'National Park, State Conservation Area, State Forest or Nature Reserve'.

The telephone survey was carried out with 2,807 NSW residents aged 18-75 years.

The sample was split into six geographical regions, and borders were mapped out with the assistance of the Australian Bureau of Statistics' 2008 Australian Standards Geographical Classification (ASGC). The regions were Greater Sydney, North Coast, Northern Tablelands, South Coast, Southern Tablelands, and Western NSW. Samples of n=400 were used in each geographic region, with the exception of Greater Sydney where a sample of n=800 was utilised.

This report presents the findings for the Northern Tablelands area. The findings for the remaining five geographic regions can be found in their respective dedicated reports.

Participation

- Participation rates indicate the percentage of survey participants who had engaged in each of a list of outdoor recreation activities in the last 12 months. The top five activities in terms of participation rates were picnicking (84%), visiting landmarks, lookouts and scenery (73%), walking on roads or footpaths for recreation (72%), scenic driving with a car or motorbike (72%) and bushwalking for less than two hours (54%).
- Frequency of participation was calculated using the reported number of times that survey participants had participated in each of the outdoor recreation activities in the last 12 months. Means were then calculated (having first truncated frequencies so that extremely frequent participants did not skew the data) for those survey participants who had done each of the activities at least once in the last year (i.e. 'participants'). The data trimming process is described further in Section 4.2 Participation. The top five activities in terms of the frequency with which the activity was undertaken in the last year were walking on roads or footpaths for recreation (103.4 times per year), trail bike or quad bike riding (102.2 times per year), horse riding (98.8 times per year), nature study (66.7 times per year) and running or jogging outdoors (54.4 times per year).
- Participants in each activity were asked whether they had participated in their local area, or further away or both. The majority of activities were practiced more often in the participants' local area, but a sizeable amount of participation occurred further afield.

Interest

- Both participants and non-participants in each of the outdoor recreation activities were asked to indicate how interested they would be in doing in each of the activities more often, if there was nothing stopping them from doing so, using a scale of 0 (not at all interested) to 10 (extremely interested). Interest in more frequent participation was highest for

picnicking, with a mean interest rating of 6.5 out of 10. This was followed by visiting landmarks, lookouts and scenery (6.1), scenic driving with a car or motorbike (6.0), walking on roads or footpaths for recreation (5.7) and attending outdoor concerts/music festivals (5.4).

- Mean interest ratings in participating more often in each of the outdoor recreation activities were greater for current participants (i.e. those who had participated in the last 12 months) than non-participants.
- Level of interest in participating more often in each of the outdoor recreation activities was then divided into three categories: low (0-3), moderate (4-6) and high (7-10). The top five interests based on the proportion of survey participants indicating high interest in participating more often were picnicking (57%), scenic driving with a car or motorbike (51%), visiting landmarks, lookouts and scenery (50%), walking on roads or footpaths for recreation (49%) and water sports (43%).

Barriers

- Barriers represent the things that survey participants cited as stopping them from participating more frequently in the activities in which they were interested. Survey participants provided open-ended responses that were later coded by the researchers. The most frequently mentioned barrier across all activities was time (83%), which can be considered to indicate the relative priority of particular activities. However, unmet demand appears to be present, with 52% of survey participants reporting a lack of local opportunities and 9% reporting a lack of awareness of any local opportunities.
- 'Actionable barriers', that is lack of local opportunities and lack of awareness of any local opportunities, were most commonly mentioned for attending outdoor concerts/music festivals (62%), snow sports (57%), water sports (48%), rock climbing, abseiling, caving or canyoning (44%) and visiting Aboriginal & other cultural heritage sites (32%).

Preferences

- Preferences represent the natural and man-made features that survey participants cited wanting if they were to do the activities in a National Park, State Conservation Area, State Forest or Nature Reserve in their region (but not in a local park or botanical garden). Survey participants provided open-ended responses that were later coded by the researchers. The most frequently requested feature across all activities was that no additional features were required (51%). The next most common response was toilets (46%). This was followed by scenery/views (e.g. waterfalls) (39%), cleared paths or trails

through the bush (unsealed) (36%), good road conditions/accessibility (29%), rest areas/seats/picnic tables (27%), and BBQs and other food preparation areas (24%).

Motivations

- Survey participants were asked to indicate the extent to which a list of statements describing motivations to participate in outdoor recreation applied to them, on a scale of 0 to 10, where 0 was not at all applicable and 10 was extremely applicable. Overall, the three highest rated motivations were 'I enjoy getting outdoors to spend time with my family or friends' (8.3 out of 10), 'I like to get outdoors for the health benefits, like breathing the fresh air' (8.0) and 'I like the outdoors for the peace and quiet' (7.9).
- There were no notable differences in the motivations for those who either participated in or were highly interested in participating more often in different types of outdoor recreation activities.

Forecasting future participation

- Forecasting was carried out in order to estimate total participation figures for the year 2018 for each of the outdoor recreation activities. Weights developed to reflect the changes in NSW from 2009 to 2018 in both the demographic (age by gender) profile and absolute population size were used to achieve this¹. There were no changes in the relative popularity of different activities and the bulk of the change in this model was due to the projected increase in the NSW population of 11%.
- A second series of analyses was carried out in order to forecast the changes that may result if PWG was to address two of the main 'actionable barriers' in relation to each of the outdoor recreation activities: lack of local opportunities and lack of awareness of local opportunities. These analyses estimated the increase in participation frequency among both current participants and non participants using the data on participation frequency, stated interest in doing an activity more often, and actionable barriers.
 - In percentage terms, when compared to current participation, it was forecasted that participation in snow sports would more than double in 2018 in actionable barriers were addressed, rising 132% compared to current overall participation.

¹ Based on Australian Bureau of Statistics 3222.0 Population Projections, Australia, TABLE B1. Population projections, By age and sex, New South Wales - Series B. Series B largely reflects current trends in fertility, life expectancy at birth, net overseas migration and net interstate migration.

Snow sports (65%), fishing (55%) and rock climbing, abseiling, caving or canyoning (52%) were also predicted to increase by over 50%. This analysis showed that, in terms of increase in forecasted number of times North Tablelands residents will participate in one year, water sports had the highest increase if actionable barriers are addressed, with a predicted 1.1 million additional events.

- These analyses were then replicated using a cohort approach, which assumes that the interest and times per year will remain the same for participants in 2018.
 - The largest increase using this approach due to population change was for trail bike or quad bike riding, which was forecasted to rise from 4 million times per year in 2009 to 5.3 million times per year in 2018. In percentage terms, when compared to current participation, it was forecasted that snow sports (240%) and rock climbing, abseiling, caving or canyoning (100%) would at least double in total annual participation by 2018 should actionable barriers be addressed. Addressing actionable barriers saw the largest impact for water sports, in terms of forecasted number of times per year, with a further 1.7 million times per year predicted should these barriers be removed.
- The assumptions of the cohort approach led to higher predictions than the demographic approach for certain activities, particularly those that had higher frequency of participation among the 18 to 24 year old age group, such as running or jogging outdoors.
 - Using this approach, if actionable barriers are addressed, running or jogging outdoors will increase by 0.8 million events in 2018, compared to only 0.2 million events under the demographic approach. Similarly, activities that had a higher frequency of participation among the oldest participants, such as walking on roads or footpaths for recreation, had a higher forecast using the demographic approach.

This section outlines the background to the project, and specifies the research objectives

RESEARCH CONTEXT

2.1 Background

The current NSW State Plan has set the Parks and Wildlife Group (PWG) of the NSW Department of Environment and Climate Change and Water (DECCW) the target of increasing the number of visits to National Parks by 20% between 2006 and 2016. Meeting this target will require increasing the frequency with which locals and tourists currently access parks, as well as increasing the number of new users. Facilitating and managing such an increase poses significant planning, management, and marketing challenges.

The objective of this research is to explore the preferences, motivations and barriers in relation to participation in nature-based outdoor recreation. This includes obtaining data on current demand, as well as forecasts for the future, in order to identify the types of experiences and locations in which PWG should supply new nature-based outdoor recreation opportunities and the ways in which it should manage existing opportunities. The research will inform strategies for increasing demand among current and prospective outdoor recreation participants.

2.2 Research objectives

Overall, the aims of the project were to understand and measure the motivations, barriers and preferences of nature-based outdoor recreation users and potential users, and the demand for a range of nature-based outdoor recreation experiences. This was achieved over two stages of research.

Specifically, the research aims were to:

- Identify the optimal approach for obtaining the precision required to understand demand, motivations and preferences for segments of the community such as basic demographic groups at regional scales, including the adoption of regional study areas if required.
- Gain an understanding of the nature-based outdoor recreation experiences people are seeking, the motivations of people who choose to participate in particular experiences, and their preferred settings for participating in these experiences.
- Gain insights to improve the application of the PWG visitor segmentation (messaging segmentation).
- Gain an understanding of the reasons people do not participate in particular nature-based outdoor recreation experiences or do not participate more frequently in particular experiences.
- Estimate the current demand for a range of nature-based outdoor recreation experiences in different settings. The main focus of the study is demand for experiences in the local area, but the demand for experiences undertaken when travelling within NSW is also of interest.
- Forecast likely changes in demand for a range of nature-based outdoor recreation experiences in different settings from 2009 to 2018.

This section provides details of the overall research methodology

RESEARCH DESIGN

3.1 Research approach

The overall research approach for this project is illustrated diagrammatically below. This document reports on the second research phase of the project, which involved a telephone survey.



3.2 Telephone survey

Conduct of the survey

A questionnaire was developed on the basis of results of the exploratory qualitative phase of this research, and in close consultation with PWG. It allowed us to measure current behaviour, interests, preferences, barriers and motivations in relation to a range of nature-based outdoor recreation experiences in different settings. It should be noted that current behaviour, interests, barriers and motivations were investigated in relation to nature-based outdoor recreation generally, not just in relation to activities carried out in National Parks, whilst preferences were investigated in relation to activities undertaken in a 'National Park, State Conservation Area, State Forest or Nature Reserve'. The full questionnaire appears in Appendix A. The survey was conducted by I-view from 30th April to 25th May 2009, and averaged 21 minutes in duration.

Survey sample

The telephone survey was carried out with 2,807 NSW residents aged 18-75 years, including current and prospective participants of nature-based outdoor recreation experiences. RDDialer, which is a source of randomly generated landline numbers for exclusive use of Australian Market and Social Research Organisation (AMSRO) members, was used to obtain the sample frame.

The sample was split into six geographical regions, and borders were mapped out with the assistance of the Australian Bureau of Statistics' 2008 Australian Standards Geographical Classification (ASGC). The regions were:

- **Greater Sydney:** Bordered on the south by Stanwell Tops and in the north by Gosford. The Blue Mountains create the western border with Lithgow the furthest west locality.
- **North Coast:** Beginning at the Queensland border in the north and runs down the coast to the Greater Sydney Border. The North Coast includes the cities of Newcastle, Taree, Coffs Harbour, Grafton and Lismore.
- **Northern Tablelands:** Adjoining the North Coast from the Queensland border down to Greater Sydney. Included are the New England and the Hunter regions, Tamworth, Armidale, Walcha and Maitland.
- **South Coast:** Runs from Wollongong along the southern coast to the Victorian Border and as far west as the Great Dividing Range.

- **Southern Tablelands:** Adjoins the South Coast from the south-west corner of Greater Sydney to the Victorian border and includes Wagga Wagga, Goulburn, Albury and ACT.
- **Western NSW:** Adjoins the Northern and Southern Tablelands and runs west and south to the border with South Australia.

The map below shows these regions. A breakdown of regions by postcodes is found in Appendix B.



Samples of n=400 were used in each geographic region, with the exception of Greater Sydney (n=800) in which a larger sample was used to provide greater accuracy of results within that area. A sample of 400 enables us to be 95% confident that a feature of the local population we are surveying is in fact within a range of $\pm 5.0\%$ around what the survey tells us, whereas the confidence interval provided by a sample of 800 is $\pm 3.5\%$.

In order to provide accurate estimates of demand, quotas were established within each location stratum, such that those who participated in the survey matched the age and gender profile of the local population. As a result, it was not necessary to weight the data. Sample quotas per location are shown in Table 3.2.1, below.

Table 3.2.1. Quotas for age and gender within location

Gender	Age group	Greater Sydney	North Coast	New England Tablelands	Western NSW	South Coast	Southern Tablelands
Male	18-34	141	53	56	56	55	70
	35-54	160	80	79	82	77	81
	55-75	94	64	62	63	64	48
Female	18-34	143	53	58	55	54	69
	35-54	165	84	82	82	83	83
	55-75	97	66	63	62	67	49
Total (n=2,800)		800 (100%)	400 (100%)	400 (100%)	400 (100%)	400 (100%)	400 (100%)

The response rate for the survey was 28.7%, based on the number of completed surveys divided by the number of completed surveys plus the number of refusals. A response rate of around 30% is standard for survey of 20-25 minutes that covers a non-sensitive topic. As the reasons why individuals chose not to participate in the survey were not recorded, it is not possible to know whether their refusal to do so resulted in any systematic bias into the data. It is possible, however, that busier individuals were less inclined to participate in the 20 minute survey (or indeed to be contacted on their home telephone in the first place), and are therefore underrepresented in the sample. This may mean that the influence of time pressures, for example, as a barrier to the participation in outdoor recreation activities may be somewhat underestimated in the findings (though, it is worth noting that, averaged across all activities, 83% of those who participated in the survey cited time as a barrier to participation in activities).

3.3 Quantitative analysis

All statistical analyses were conducted in-house, using SPSS and Q Research Software. Coding and editing of variables and statistical manipulations were conducted as appropriate, and weighting was used in the forecasting.

When significant differences are noted in mean tables, green font indicates that the mean for that group (e.g. male 18-24) was significantly higher than the combined mean of all other groups. In contrast, red font indicates the mean for that group (e.g. male 18-24) was significantly lower than the combined mean of all other groups. The statistical test conducted was an independent samples t-test, and alpha was set at .05.

When significant differences are noted in tables that report percentages, green font indicates that the proportion of participants in that group (e.g. male 18-24) was significantly greater

than would be expected if participation was equally distributed across all groups. In contrast, red font indicates that the proportion of participants in that group (e.g. male 18-24) was significantly less than would be expected if participation was equally distributed across all groups. The statistical test conducted was a Standardised and Adjusted Residual Analysis, and alpha was set at .05.

This section presents the findings of the quantitative telephone survey for the Northern Tablelands area

RESEARCH FINDINGS

4.1 Introduction

This section presents the findings of the quantitative telephone survey for the North Tablelands area, which will be useful for land managers in the North Tablelands area and any area that receives significant visitation from North Tablelands residents. The findings for the remaining five geographic regions (Greater Sydney, North Coast, South Coast, South Tablelands, and Western NSW) can be found in their respective, dedicated reports. The findings can be used for a number of different land management challenges, including the following:

- **Planning supply of nature-based outdoor recreation experiences**

The figures and data tables in this section and the appendices provide rich data for land managers to form an understanding of demand and thereby inform planning to supply nature-based outdoor recreation experiences. By looking at the following data alongside data on the current supply of nature-based outdoor recreation experiences in a region, land managers can identify gaps where more experiences are required:

- **Total participation** is the total number of occasions an activity is undertaken across the region annually. It helps us to consider the supply required, where activities with a high total participation require a large amount of supply.
- The four forecasts of **total future annual participation** are predictions of the total number of occasions an activity will be undertaken across the region in 2018.

- **Participation rates** indicate the size of the audience for a particular activity. Activities with a high participation rate are likely to involve a broad audience. The breakdown of participation rates by local area and further afield indicates the extent to which supply is required locally or elsewhere in NSW or both.

While being useful indicators of the amount of supply required, **total participation** and **participation rates** are limited in that they are themselves influenced by the supply of an activity (if there is little or no supply total participation will be suppressed even if demand is high). A richer picture of the amount of supply required is revealed by looking at data on **interest in participating more often** alongside **actionable barriers**:

- **Interest in participating more often** is a measure of the strength of interest in the population in participating more often in an activity.
- There are many barriers preventing people who are interested in participating more often from doing so. **Actionable barriers** are barriers related to supply or awareness of supply. Activities which rank highly on both interest in participating more often and actionable barriers usually require more supply than indicated by the total participation and participation rates.

Where gaps are identified, land managers can use **preferences for participation** to help make decisions about where and how to supply experiences. Preferences indicate the natural and man-made features respondents prefer when undertaking an activity. They include features of site (scenery, accessibility, terrain, shade, swimming areas etc.), facilities (toilets, rest areas, seats and picnic tables, children's playgrounds etc.) and the experience (other people present, isolation, crowds, restrictions etc.).

Preferences for participation also indicate the diversity of experiences required across the region. Activities which receive a high ranking for a high level of facilities (toilets, rest areas, seats and picnic tables, children's playgrounds etc.) and also receive a high ranking for limited facilities (completely unspoilt surroundings, no additional facilities) need a diversity of supply. Activities which receive a high ranking for other people present and for isolation also need a diversity of supply.

▪ **Providing high quality nature-based outdoor recreation experiences**

The figures and data tables in this section and the appendices provide the following data to inform development of new nature-based outdoor recreation experiences and revitalisation of existing experiences:

- **Preferences for participation** indicate the natural and man-made features of the site, facilities and experience that respondents prefer, which high quality experiences may incorporate.
- **Barriers to more frequent participation** are the barriers preventing people who are interested in participating in an activity more often from doing so. They include barriers that may be addressed when providing experiences (e.g. facilities, skills and equipment, accessibility, safety etc.).
- **Promoting nature-based outdoor recreation experiences**

The figures and data tables in this section and the appendices provide data to inform promotion of nature-based outdoor recreation experiences:

- **Actionable barriers** are barriers related to supply or awareness of supply. By looking at actionable barriers alongside data on the current supply of nature-based outdoor recreation experiences in a region, land managers can identify promotion needs. More promotion of current supply may be required for activities which appear to have plenty of supply but rank highly on actionable barriers.
- **Age and gender** data help define who is participating in activities. Depending on the purpose of promotions, land managers may wish to target promotions to age and gender groups that are frequent participants, or they may wish to target promotions to groups whose participation is currently limited.
- The breakdown of **participation rates** by local area and further afield indicates where promotions are best targeted. Land managers elsewhere in NSW may wish to promote activities in North Tablelands if participation rates further afield are high.
- **Barriers to more frequent participation** are the barriers preventing people who are interested in participating in an activity more often from doing so. They include barriers that targeted promotions may address.
- **Preferences for participation** indicate the natural and man-made features which may be attractive in promotions. They also indicate areas where it may be necessary to manage expectations (e.g. facilities).
- **Mean ratings of personal applicability of motivations** indicate the relative strength of motivations that drive people to undertake nature-based outdoor recreation activities which may be used in promotions to attract participants.

4.2 Participation

Survey participants were asked how many times they had done each of a list of 25 outdoor recreation activities in the last 12 months. These activities were:

- Attending outdoor concerts/music festivals
- Bush or nature walking for less than two hours on trails, tracks or boardwalks
- Bushwalking or hiking for two hours or more, but not overnight
- Bushwalking or hiking with overnight camping
- Car camping, that is, camping within easy walking distance of your car
- Cycling on a sealed bike path or track
- Cycling on roads or footpaths for recreation, not just to get to and from places
- Cycling or mountain biking on an unsealed road or track
- Fishing
- Four-wheel driving on unsealed roads or tracks
- Horse riding
- Nature study, including bird or other wildlife watching, tree and flora appreciation, nature photography or painting/drawing
- Picnicking, including outdoor social gatherings like weddings, family reunions, club fun days, etc.
- Rock climbing, abseiling, caving or canyoning
- Running or jogging outdoors
- Scenic driving with a car or motorbike
- Snow sports, including skiing, snowboarding, tobogganing
- Sports involving motorised watercraft, including motorboating, speedboating, jet skiing, water-skiing and wakeboarding

- Sports involving non-motorised watercraft, including sailing, canoeing, rowing, kayaking and rafting
- Trail bike or quad bike riding
- Visiting Aboriginal and other cultural heritage sites
- Visiting landmarks, lookouts and scenery
- Volunteer work for the environment, for example, bush regeneration
- Walking on roads or footpaths for recreation, not just to get to and from places
- Water sports, including outdoor swimming, snorkelling, surfing, bodyboarding, wind surfing and kite surfing

Please note that the names of these activities have been abbreviated in the charts due to space constraints.

Participation rates

Survey participants who responded zero were considered non-participants in that activity for the purposes of this survey, while those who responded one or more times were considered current participants. In the sample of North Tablelands residents, 5 (1%) had not participated in any of the activities in the last year. These participants still provided responses to the other questions in the survey.

Participation rates, or the percentage of people who had participated in each of the outdoor recreation activities in the last year, are presented in Figures 4.2.1 and 4.2.2.

Figure 4.2.1 Participation rates for outdoor recreation activities in the last 12 months
– Part I

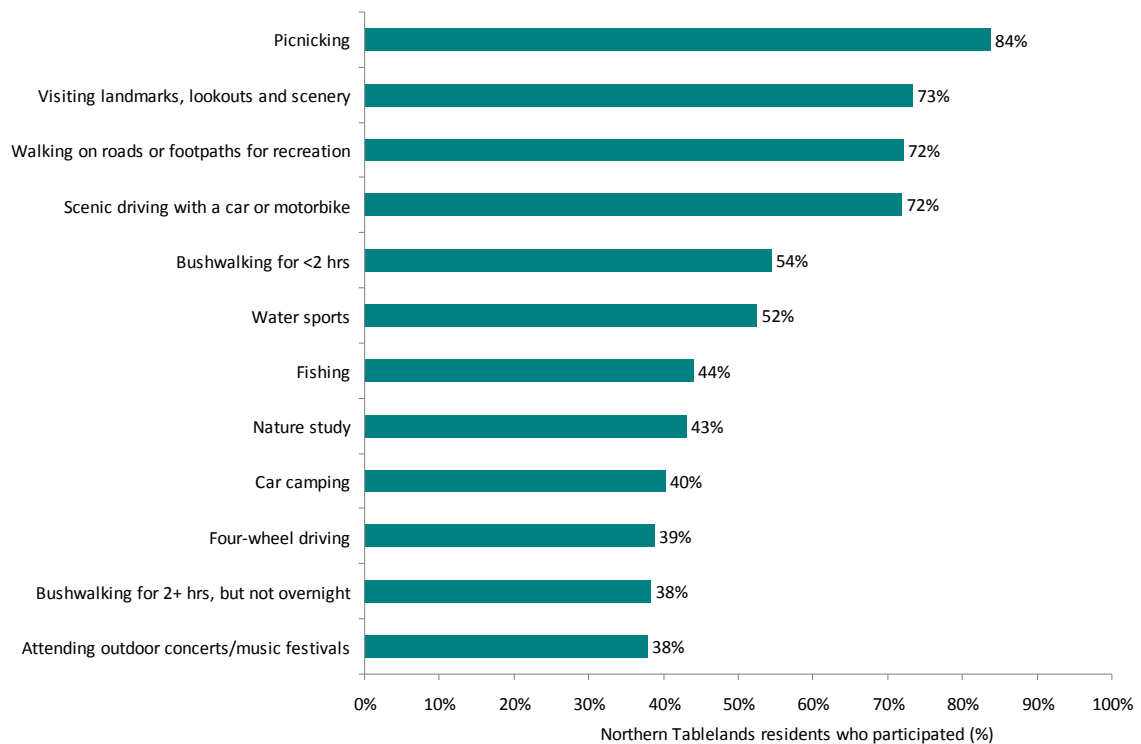
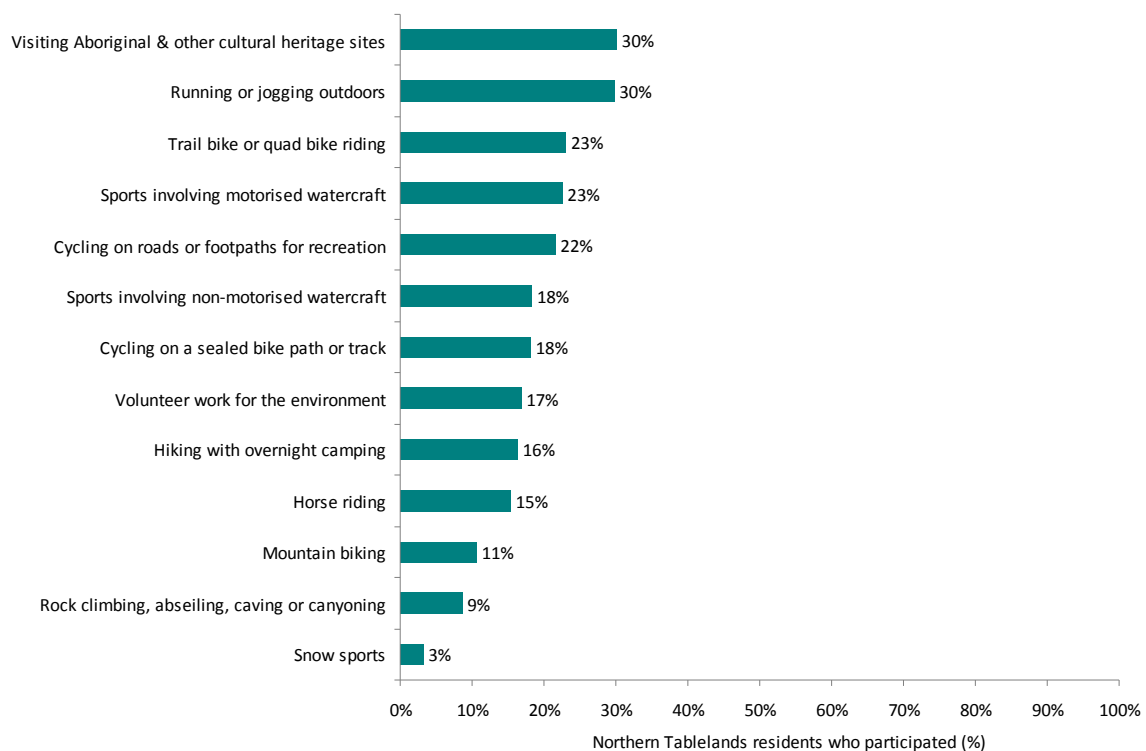


Figure 4.2.2 Participation rates for outdoor recreation activities in the last 12 months
– Part II



As can be seen from Figures 4.2.1 and 4.2.2, the top five activities in terms of participation rates were picnicking (84%), visiting landmarks, lookouts and scenery (73%), walking on roads or footpaths for recreation (72%), scenic driving with a car or motorbike (72%) and bushwalking for less than two hours (54%).

Participation rates for the top five outdoor recreation activities broken down by age and gender are presented in Table 4.2.1. The breakdowns for the remainder of the activities can be found in Appendix C.

Table 4.2.1 Participation rates for top five outdoor recreation activities by age and gender

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Picnicking	89%	89%	84%	74%	91%	91%	88%	85%	84%
Visiting landmarks, lookouts and scenery	78%	74%	70%	74%	73%	68%	74%	75%	73%
Walking on roads or footpaths for recreation	56%	61%	65%	62%	82%	87%	76%	82%	72%
Scenic driving with a car or motorbike	67%	76%	86%	71%	82%	66%	65%	71%	72%
Bushwalking for <2 hrs	67%	63%	49%	46%	64%	64%	53%	55%	54%

As Table 4.2.1 shows, males aged 45-75 had a significantly lower participation rate for picnicking (74%) and walking on roads or footpaths for recreation (62%). Women aged 45-75 had a significantly higher participation rate for walking on roads or footpaths for recreation (82%).

Frequency of participation

As noted above, participants were asked to estimate the number of times they had participated in each of the outdoor recreation activities in the last 12 months. Means for the frequency of participation, which indicate the average number of times the activity was participated in over the last year, were then calculated.

A small number of participants reported extremely frequent participation. These participants were re-contacted and asked to confirm their responses as part of the data checking process. Sixty-one participants reported extremely frequent participation for one or more activities. Of these 61 participants, 9 confirmed their responses, while 41 revised at least one of their answers. The remaining 11 participants were unable to be contacted again. The data set was then updated to include respondents' revised answers.

To prevent outliers from skewing the mean frequency of participation for each activity, responses in the revised data set were truncated according to the cut-offs shown in the table

below. These cut-offs were chosen as plausible upper-bounds, based on both commonsense and an examination of the data. Truncation simply entails reducing scores above a cut-off point to that cut-off point. Therefore, all participants who reported, for example, walking on roads or footpaths more than 365 times in the last year had their score reduced to 365. The percentage of North Tablelands participants (i.e. those who had participated in the activity at least once in the past 12 months) who had their data truncated for each activity type is shown in Table 4.2.2.

Table 4.2.2 Data trimming

	Cut-off	% participants	n
Walking on roads or footpaths for recreation	>365	0.0%	0
Bushwalking for <2 hrs	>365	0.0%	0
Bushwalking for 2+ hrs, but not overnight	>104	0.2%	1
Hiking with overnight camping	>26	0.2%	1
Running or jogging outdoors	>365	0.0%	0
Cycling on roads or footpaths for recreation	>365	0.0%	0
Cycling on a sealed bike path or track	>365	0.0%	0
Mountain biking	>365	0.0%	0
Picnicking	>104	0.5%	2
Car camping	>26	1.2%	5
Snow sports	>26	0.2%	1
Water sports	>365	0.0%	0
Sports involving motorised watercraft	>104	0.0%	0
Sports involving non-motorised watercraft	>104	0.0%	0
Scenic driving with a car or motorbike	>104	0.7%	3
Four-wheel driving	>208	2.7%	11
Trail bike or quad bike riding	>365	0.2%	1
Rock climbing, abseiling, caving or canyoning	>52	0.0%	0
Visiting landmarks, lookouts and scenery	>104	0.5%	2
Visiting Aboriginal and other cultural heritage sites	>52	0.2%	1
Nature study	>365	0.0%	0
Volunteer work for the environment	>208	1.0%	4
Attending outdoor concerts/music festivals	>12	0.7%	3
Fishing	>365	0.0%	0
Horse riding	>365	0.0%	0

Mean frequency of participation in each of the outdoor recreation activities for participants only (i.e. the average number of times that participants had participated in each of the outdoor activities) in the last year are presented in Figures 4.2.3 and 4.2.4.

Figure 4.2.3 Frequency of participation in outdoor recreation activities in the last 12 months (participants only) – Part I

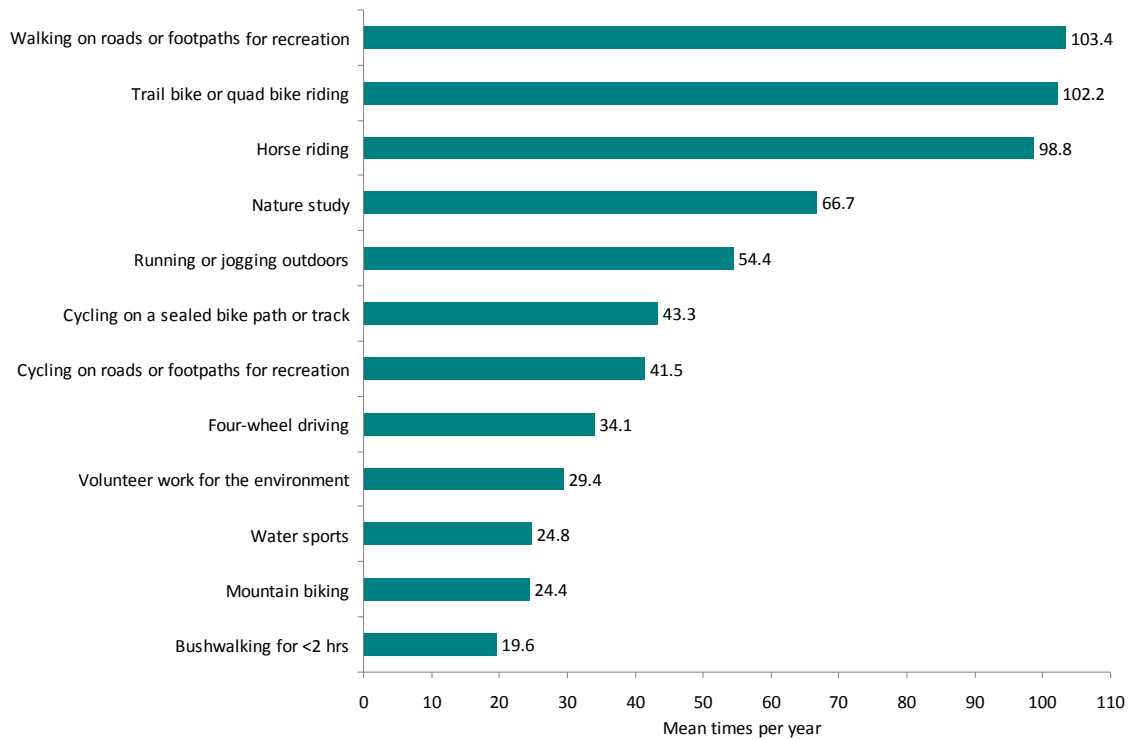
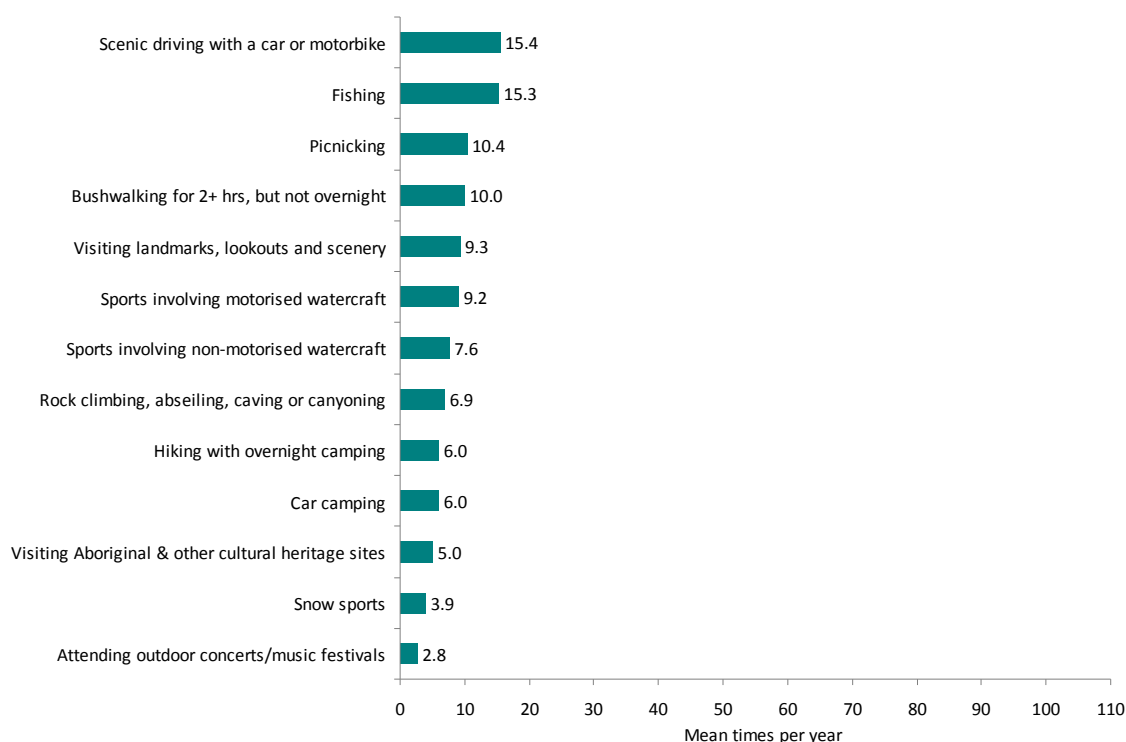


Figure 4.2.4 Frequency of participation in outdoor recreation activities in the last 12 months (participants only) – Part II



Looking at the mean frequency of participation in activities by participants (Figures 4.2.3 and 4.2.4), walking on roads and footpaths for recreation (103.4 times per year) was the most frequently engaged in activity, followed by trail bike or quad bike riding (102.2). The next three most frequently participated in activities were horse riding (98.8), nature study (66.7) and running or jogging outdoors (54.4).

Means for the frequency of participation by participants in the top five outdoor recreation activities broken down by age and gender are presented in Table 4.2.3. The breakdowns for the remainder of the activities can be found in Appendix C.

Table 4.2.3 Frequency of participation in top five outdoor recreation activities by age and gender (participants only)

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Walking on roads or footpaths for recreation	97	61	63	126	63	78	99	126	103
Trail bike or quad bike riding	115	60	80	174	53	37	118	99	102
Horse riding	172	172	140	78	18	85	17	114	99
Nature study	46	8	79	103	17	15	53	74	67
Running or jogging outdoors	55	56	61	74	15	49	46	46	54

As Table 4.2.3 shows, males aged 25-34 (8 times per year) and females aged 25-34 (15 times per year) had a significantly lower mean frequency of participation in nature study.

Means for the frequency of participation across both participants and non-participants (i.e. the average number of times that both participants and non-participants had participated in each of the outdoor activities) in the last year for each of the outdoor recreation activities are presented in Figures 4.2.5 and 4.2.6.

Figure 4.2.5 Frequency of participation in outdoor recreation activities in the last 12 months (participants and non-participants) – Part I

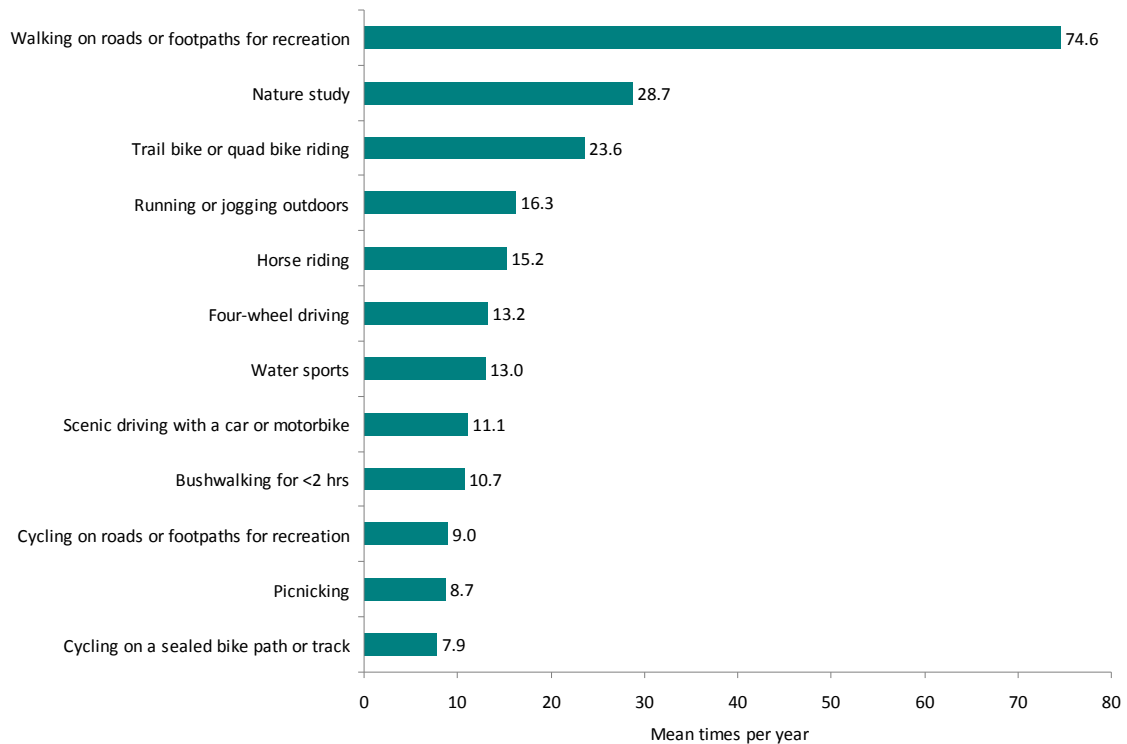
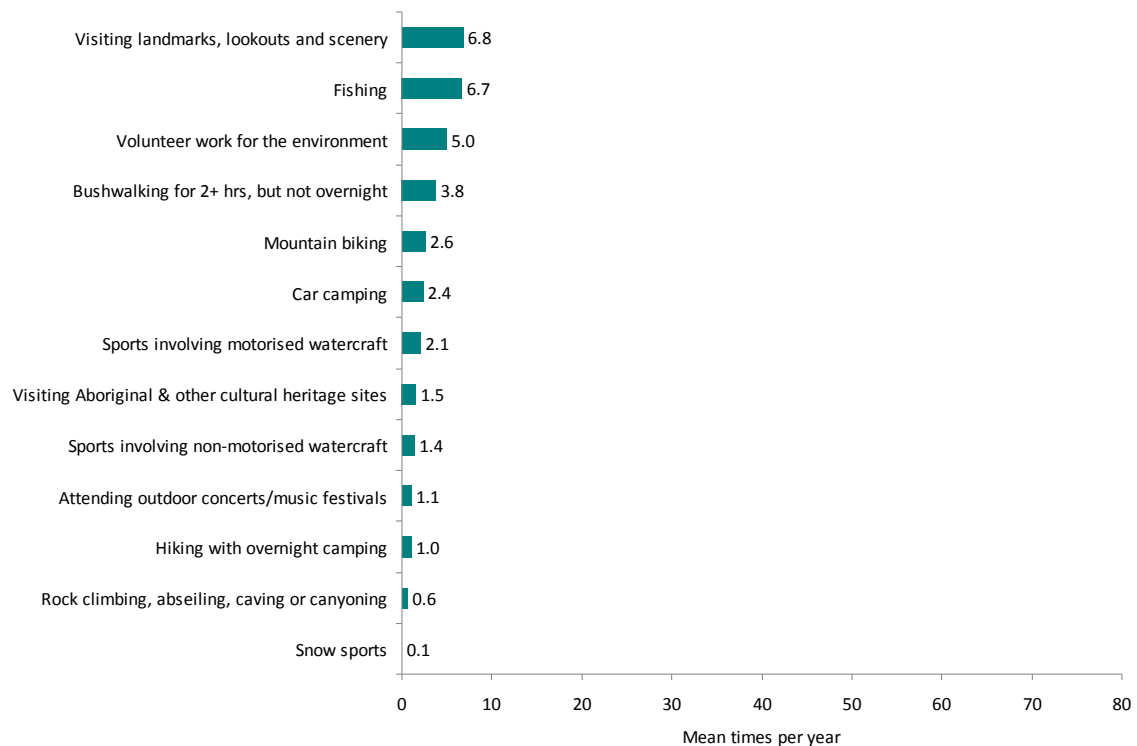


Figure 4.2.6 Frequency of participation in outdoor recreation activities in the last 12 months (participants and non-participants) – Part II



Averaging across participants and non-participants, walking on roads or footpaths for recreation (74.6 times per year) was by far the most frequently engaged in activity. This was followed by nature study (28.7), trail bike or quad bike riding (23.6), running or jogging outdoors (16.3) and horse riding (15.2).

Means for the frequency of participation by both participants and non-participants in the top five outdoor recreation activities broken down by age and gender are presented in Table 4.2.4. The breakdowns for the remainder of the activities can be found in Appendix C.

Table 4.2.4 Frequency of participation in the top five outdoor recreation activities by age and gender (participants and non-participants)

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Walking on roads or footpaths for recreation	54	37	41	77	51	68	75	104	75
Nature study	10	3	26	44	5	5	28	40	29
Trail bike or quad bike riding	89	24	35	28	10	5	28	13	24
Running or jogging outdoors	37	34	26	14	8	22	15	4	16
Horse riding	48	27	30	8	6	14	4	12	15

As Table 4.2.4 shows, the mean frequency for walking on roads or footpaths for recreation frequency was significantly higher among females aged 45-75 years (104 times per year), but significantly lower among males 25-34 years (37 times per year). Nature study had a significantly lower mean frequency of participation among 25-34 year old males (3 times per year), 25-34 year old females (5 times per year) and 18-24 year old females (5 times per year).

Females aged 25-34 years old had a significantly lower mean frequency of participation for trail bike or quad bike riding (5 times per year). Females aged 45-75 years old had a significantly lower mean frequency of participation for running or jogging outdoors (4 times per year). Females aged 35-44 years old had a significantly lower mean frequency of participation for horse riding (4 times per year).

Total participation figures were estimated for each of the outdoor recreation activities for the last 12 months by multiplying, in each age by gender subgroup:

- the mean frequency of participation (including both participants and non-participants);
- and the number of people in each age by gender group in the population for that region.

Overall total participation figures for each of the outdoor recreation activities are presented in Figures 4.2.7 and 4.2.8. The 45-75 year old age bracket was split into three 10 year age bands for the calculation of overall total participation displayed in the figures below.

Figure 4.2.7 Total participation in outdoor recreation activities in the last 12 months
– Part I

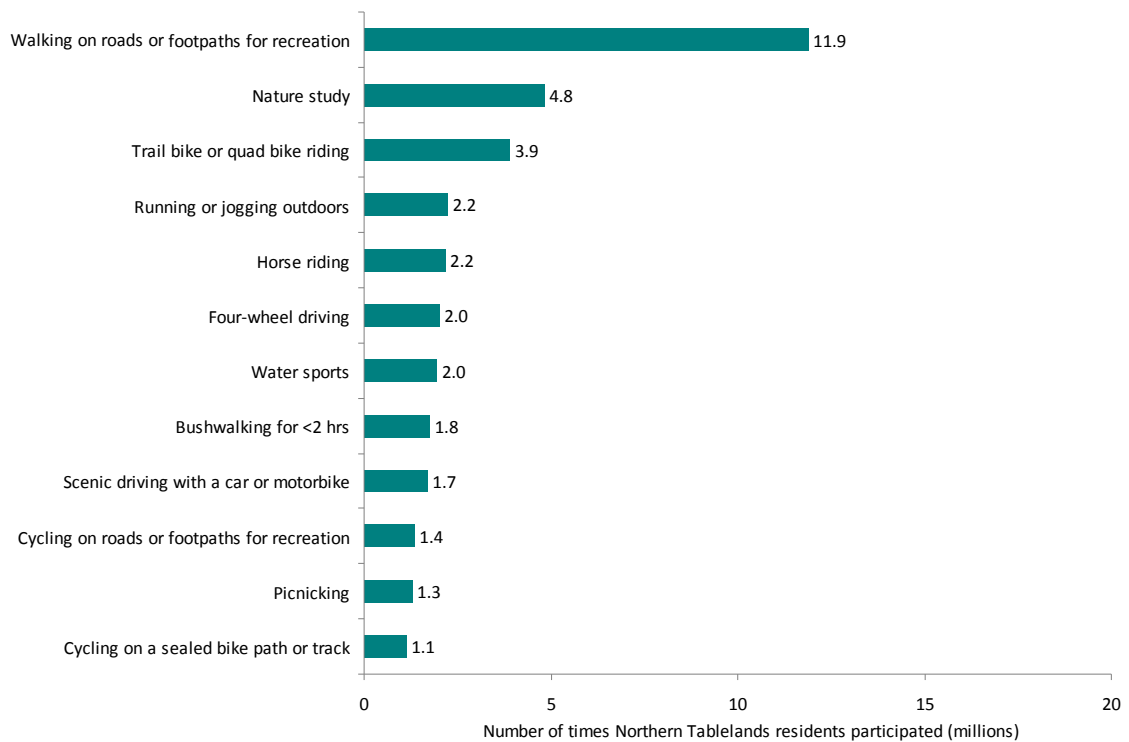
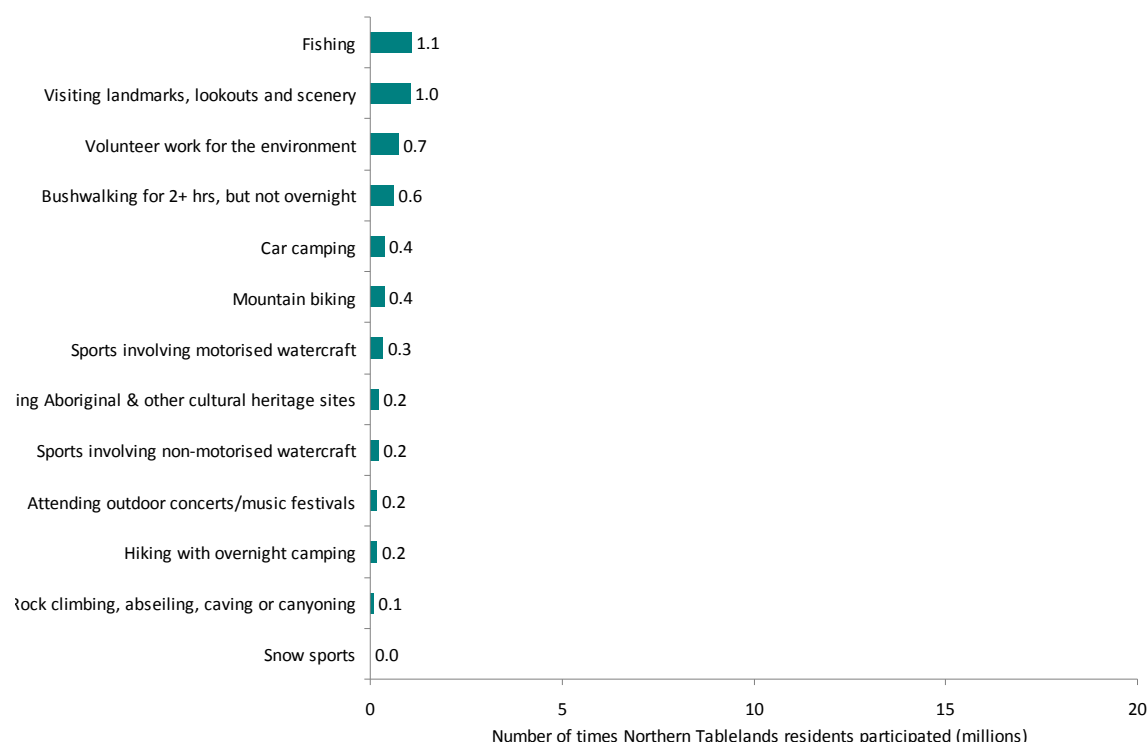


Figure 4.2.8 Total participation in outdoor recreation activities in the last 12 months
– Part II



As can be seen from Figures 4.2.7 and 4.2.8, the top five activities were walking on roads or footpaths for recreation (11.9 million), nature study (4.8 million), trail bike or quad bike riding (3.9 million), running or jogging outdoors (2.2 million), and horse riding (2.2 million).

Total participation figures for the top five outdoor recreation activities broken down by age and gender are presented in Table 4.2.5. The breakdowns for the remainder of the activities can be found in Appendix C. These figures are calculated using the same age and gender subgroups used throughout the rest of the report, so they differ slightly from Figures 4.2.7 and 4.2.8 above.

Table 4.2.5 Total participation in the top five outdoor recreation activities by age and gender (millions) *

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Walking on roads or footpaths for recreation	0.5	0.5	0.6	3.1	0.5	0.9	1.2	4.2	11.6
Nature study	0.1	0.0	0.4	1.8	0.0	0.1	0.4	1.6	4.5
Trail bike or quad bike riding	0.9	0.3	0.5	1.2	0.1	0.1	0.4	0.5	4.0
Running or jogging outdoors	0.4	0.4	0.4	0.6	0.1	0.3	0.2	0.2	2.5
Horse riding	0.5	0.3	0.5	0.3	0.1	0.2	0.1	0.5	2.4

* No significance testing done for this table

Location

Participants in each activity were asked whether they had participated in their local area, further away, or both.

Proportions of participants who had participated in their local area and further afield, in addition to total participation rates, are provided in Figures 4.2.9 and 4.2.10.

Figure 4.2.9 Participation rates for outdoor recreation activities in the last 12 months by local area and further away – Part I

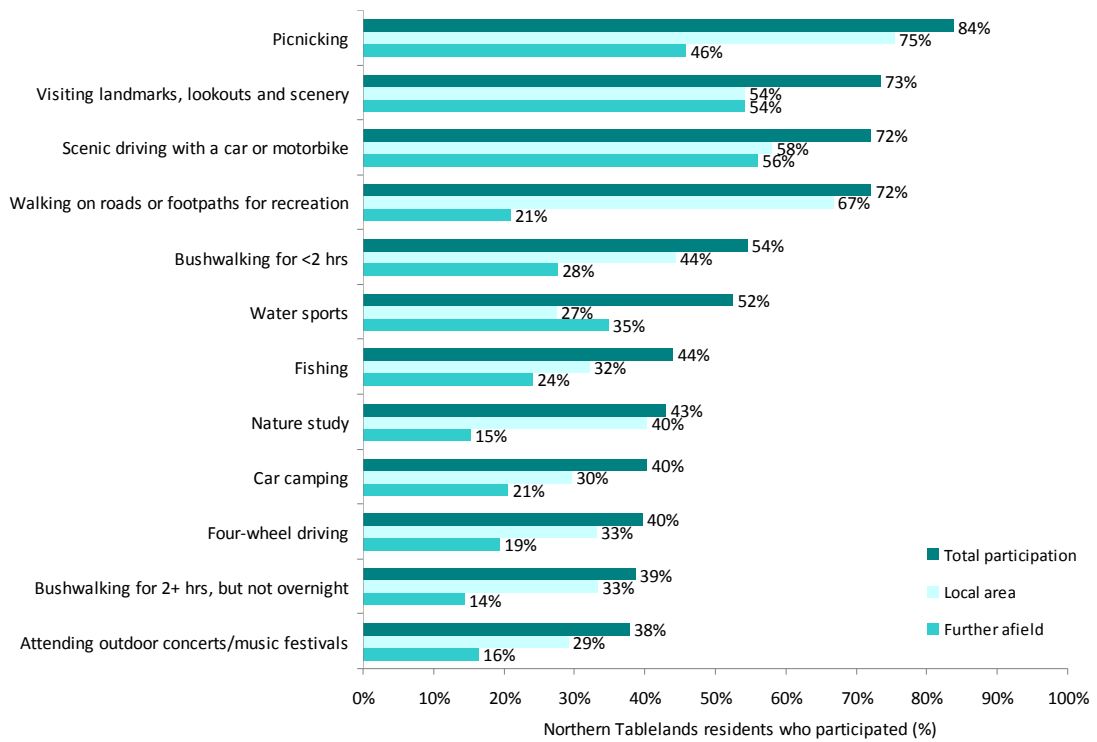
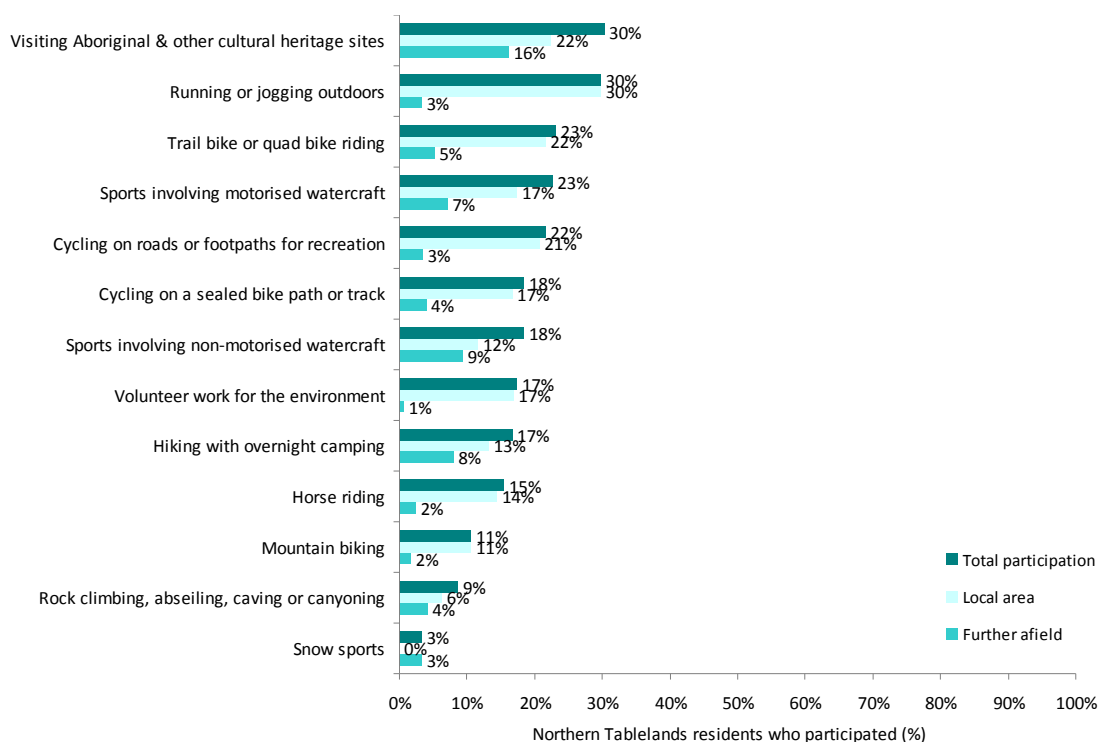


Figure 4.2.10 Participation rates for outdoor recreation activities in the last 12 months by local area and further away – Part II



As can be seen from Figures 4.2.9 and 4.2.10, while more people reported having participated in the activities in their local area, there was a sizeable proportion of people who reported participation further afield.

4.3 Interest

Both participants and non-participants in each of the outdoor recreation activities were asked to indicate how interested they would be in doing in each of the activities more often, if there was nothing stopping them from doing so. They were directed to use a scale of 0 to 10, where 0 was not at all interested and 10 was extremely interested.

Mean interest ratings in participating more often in each of the outdoor recreation activities are presented in Figures 4.3.1 and 4.3.2.

Figure 4.3.1 Interest in more frequent participation in outdoor recreation activities – Part I

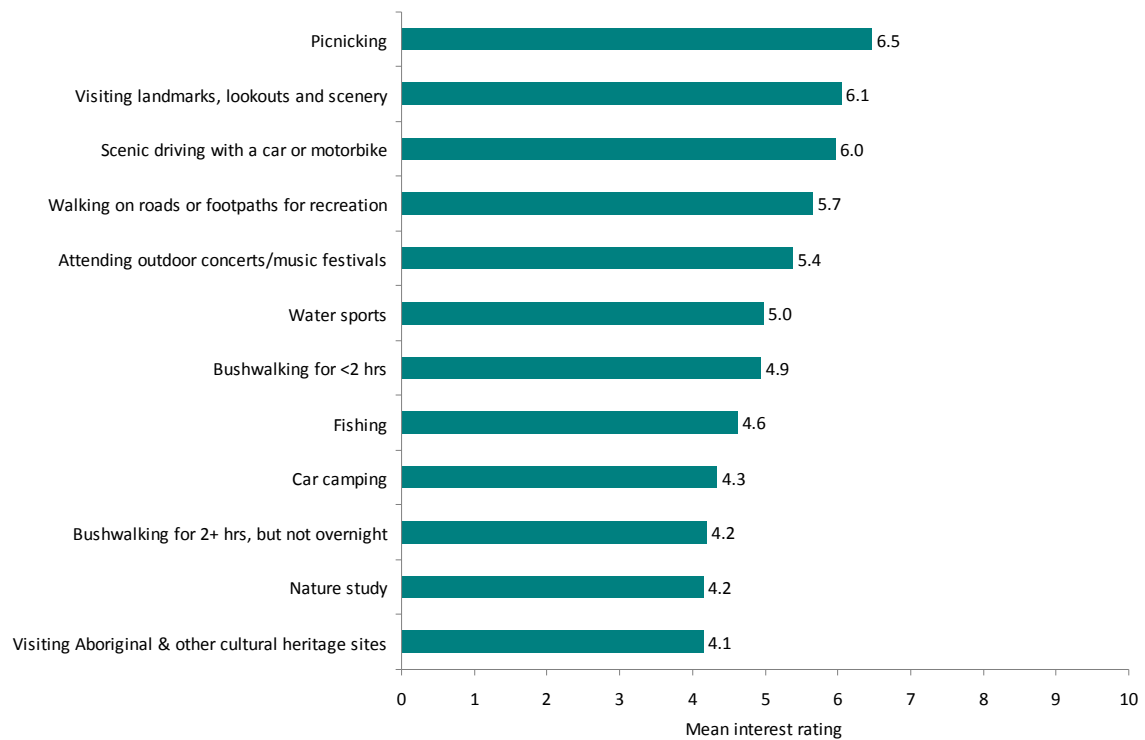
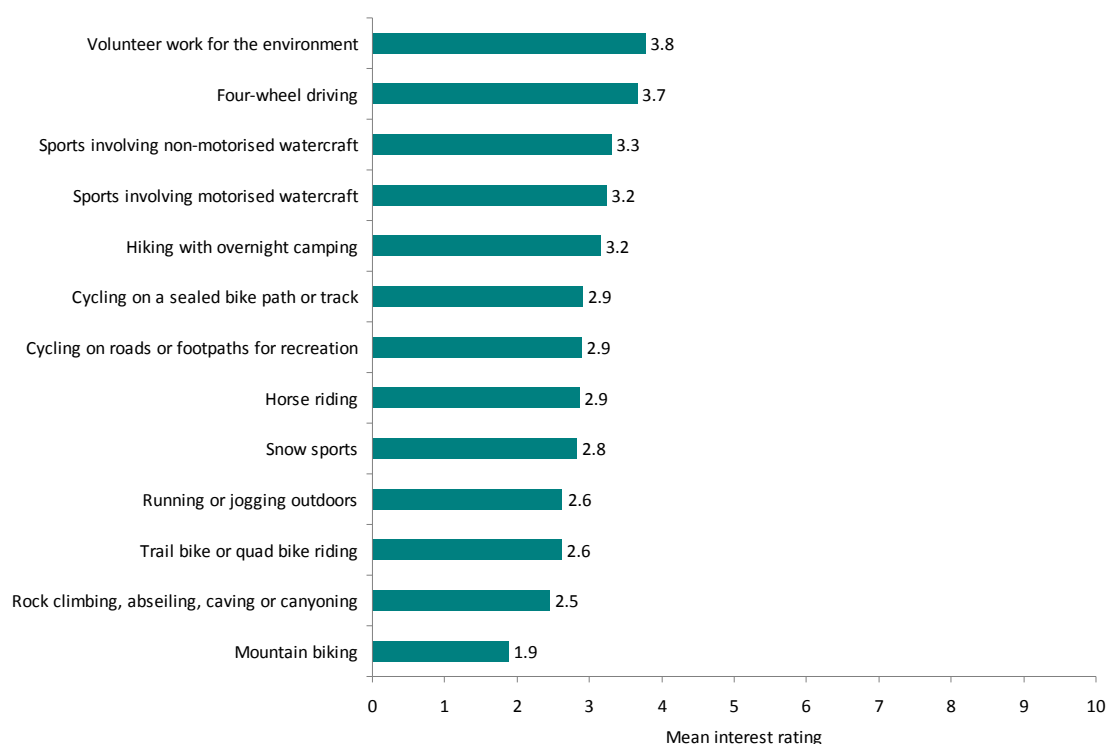


Figure 4.3.2 Interest in more frequent participation in outdoor recreation activities – Part II



As can be seen in Figure 4.3.1, interest in more frequent participation was highest for picnicking, with a mean interest rating of 6.5 out of 10. This was followed by visiting landmarks, lookouts and scenery (6.1 out of 10), scenic driving with a car or motorbike (6.0), walking on roads or footpaths for recreation (5.7) and attending outdoor concerts/music festivals (5.4). The activity with the lowest mean interest rating was mountain biking, with a rating of 1.9, as shown in Figure 4.3.2.

Mean interest ratings in participating more often in each of the outdoor recreation activities broken down by age and gender are presented in Table 4.3.1. The breakdowns for the remainder of the activities can be found in Appendix C.

Table 4.3.1 Interest in more frequent participation in outdoor recreation activities by age and gender

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Picnicking	6.0	7.5	6.3	5.3	7.2	7.3	7.6	6.6	6.5
Visiting landmarks, lookouts and scenery	5.4	5.7	5.7	6.1	6.0	6.4	6.4	6.1	6.1
Walking on roads or footpaths for recreation	3.4	5.0	4.8	4.7	5.7	7.7	6.6	6.3	5.7
Scenic driving with a car or motorbike	4.9	6.6	6.9	5.4	6.0	5.8	5.7	6.3	6.0
Water sports	6.2	6.9	4.8	3.9	6.8	5.4	6.3	4.4	5.0

As Table 4.3.1 shows, interest for more frequent participation in picnicking was significantly higher among males aged 25-34 (7.5) and females aged 35-44 (7.6); and significantly lower among males aged 45-75 (5.3).

Interest in walking on roads or footpaths for recreation was significantly higher among females aged 25-34 (7.7) and significantly lower among males aged 18-24 (3.4) and 45-75 (4.7).

Interest in water sports was significantly higher for males aged 25-34 (6.9) and significantly lower for males aged 45-75 (3.9).

Mean interest ratings in participating more often in each of the outdoor recreation activities were greater for current participants than non-participants, as can be seen in Figures 4.3.3 and 4.3.4.

Figure 4.3.3 Interest in more frequent participation in outdoor recreation activities by participation status – Part I

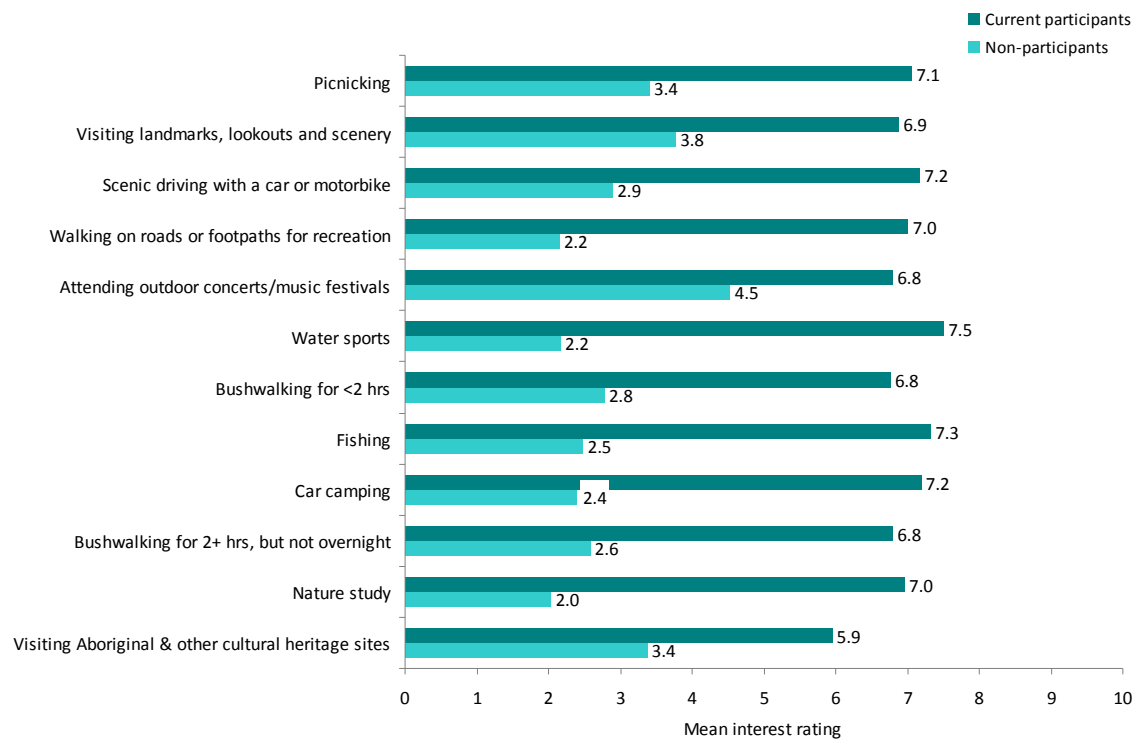
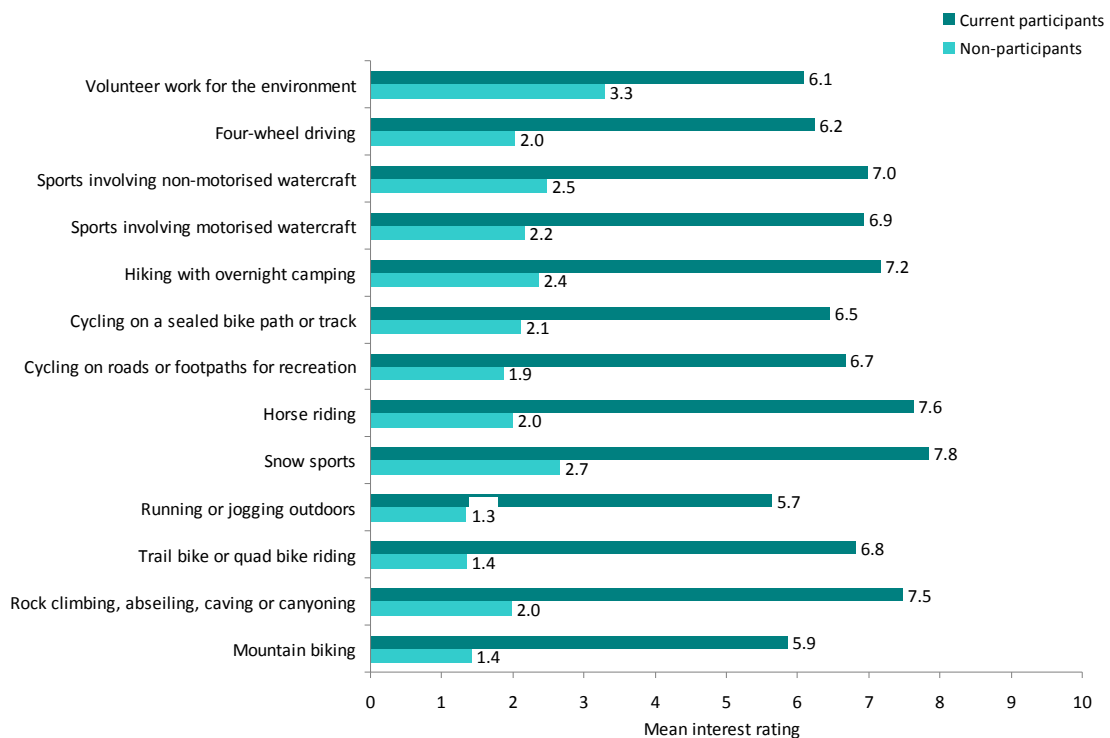


Figure 4.3.4 Interest in more frequent participation in outdoor recreation activities by participation status – Part II



As Figure 4.3.3 shows, the highest difference in interest ratings between participants and non-participants is for horse riding (7.6 for participants, 2.0 for non-participants). The activities with the highest mean ratings among non-participants were attending outdoor concerts/music festivals (4.5) and visiting landmarks, lookouts and scenery (3.8). The activities with the highest mean ratings among participants were snow sports (7.8) and horse riding (7.6). The lowest mean interest ratings among non-participants were for running or jogging outdoors (1.3), trail bike or quad bike riding and mountain bike riding (1.4), as shown in Figure 4.3.4.

Level of interest in participating more often in each of the outdoor recreation activities was divided into three categories: low (0-3), moderate (4-6) and high (7-10). The proportions of survey participants spread across the interest categories for each activity are presented in Figures 4.3.5 and 4.3.6.

Figure 4.3.5 Categories of interest in more frequent participation in outdoor recreation activities – Part I

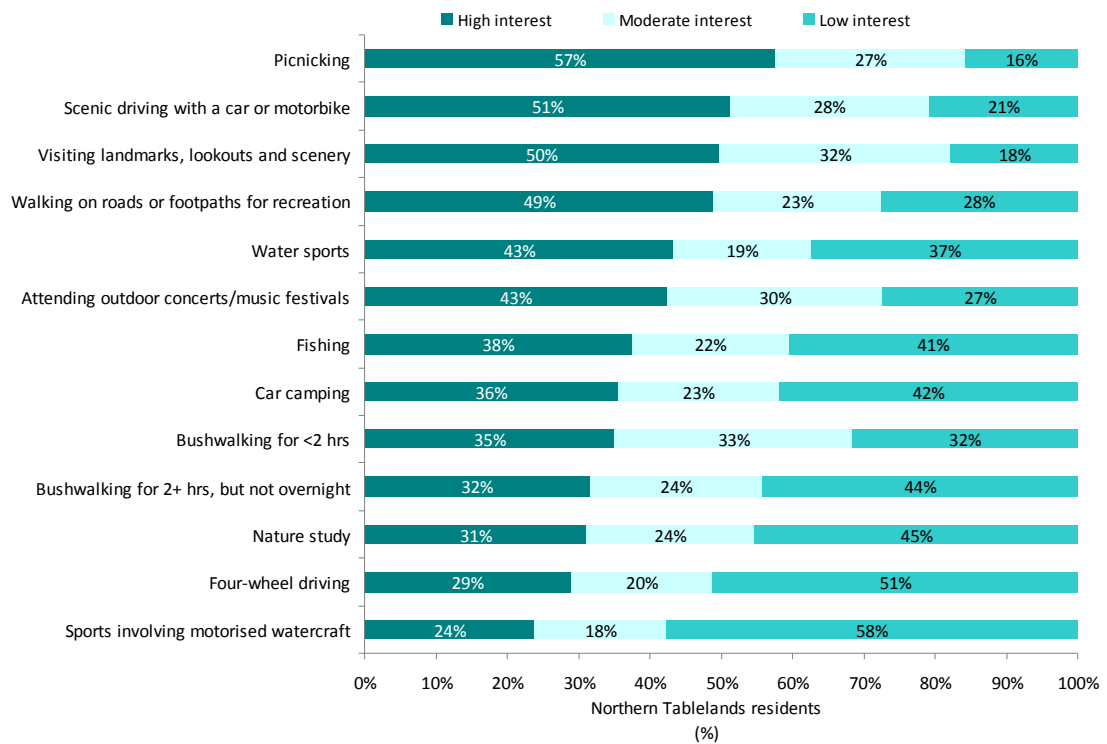
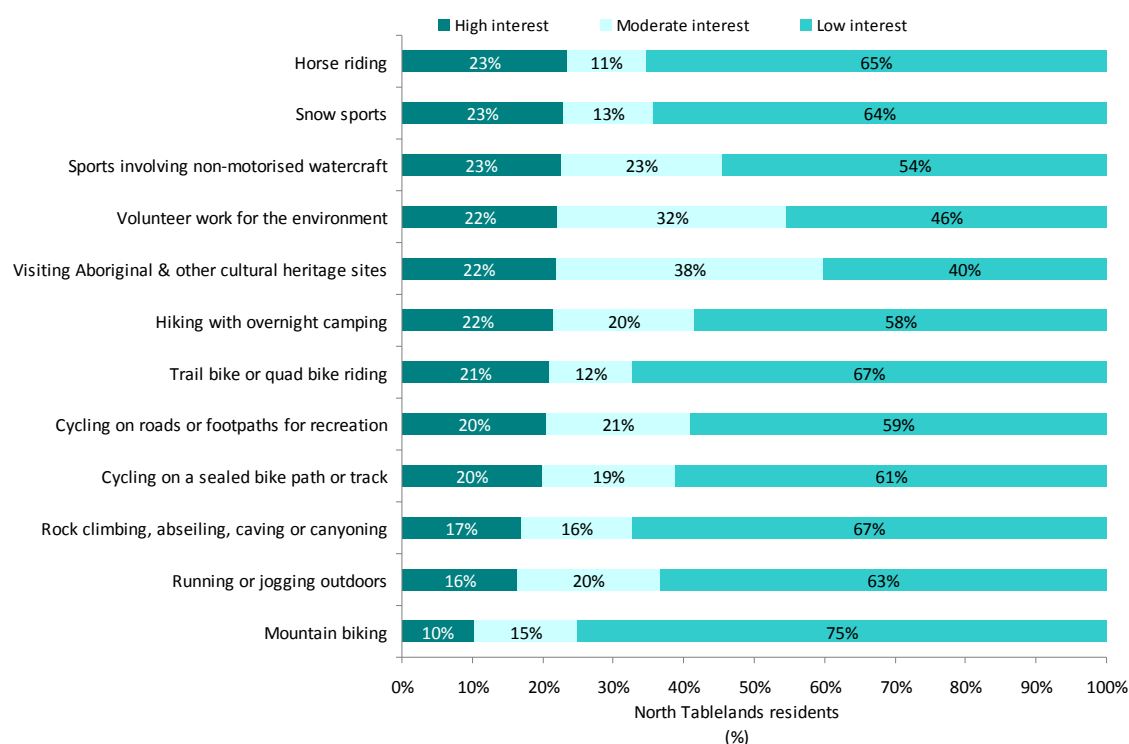


Figure 4.3.6 Categories of interest in more frequent participation in outdoor recreation activities – Part II



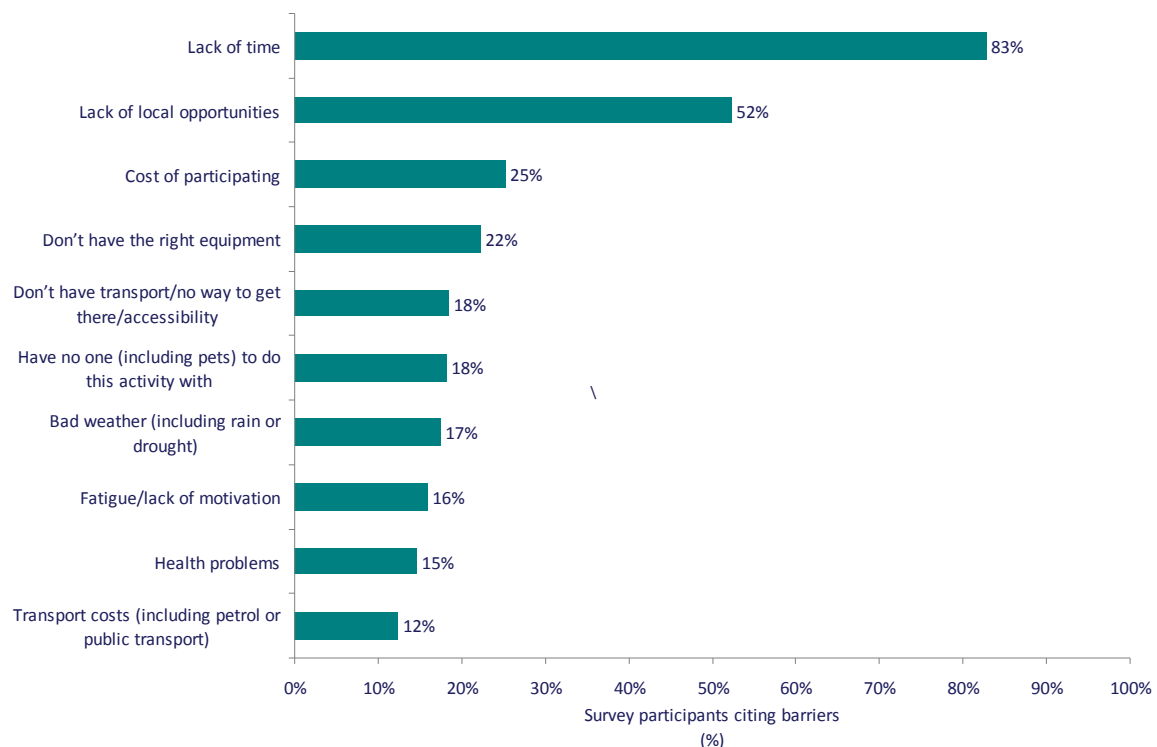
As can be seen in Figures 4.3.5 and 4.3.6, the top five activities based on proportion of survey participants indicating high interest in participating in an activity more often were similar to those based on mean interest ratings. These were picnicking (57%), scenic driving with a car or motorbike (51%), visiting landmarks, lookouts and scenery (50%), walking on roads or footpaths for recreation (49%), and water sports (43%).

4.4 Barriers

Survey participants were asked an additional question about a subset of activities that they indicated they would be interested in doing more often (that is, to which they gave a score of at least 5 out of 10), regardless of whether they currently participated in the activity. For these activities, survey participants were asked to indicate some of the things stopping them from doing so. Survey participants provided open-ended responses, which were later coded by the researchers. To reduce the burden on participants, they were asked to provide a response on barriers for a maximum of five activities.

The top 10 barriers overall are presented in Figure 4.4.1 (refer to Appendix C for the remainder of the barriers). Participants who reported no barriers, or indicated that they were not interested in doing the activity more often, were excluded from the analysis.

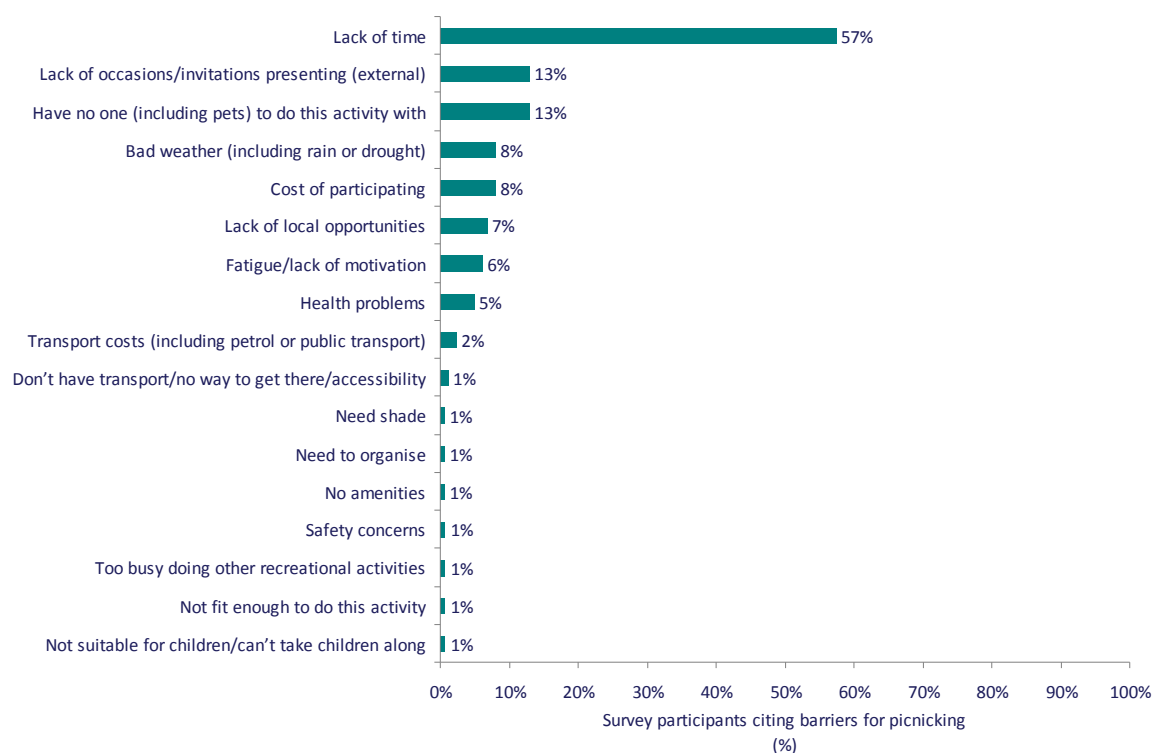
Figure 4.4.1 Barriers to more frequent participation in outdoor recreation averaged over activities



The most frequently mentioned barrier across all activities was time (83%), which can be considered to indicate the relative priority of particular activities. However, unmet demand appears to be present, with 52% reporting a lack of local opportunities.

The barriers for picnicking, the outdoor recreation activity for which there was the greatest interest in participating more often, are outlined in Figure 4.4.2. The barriers for the remainder of the activities can be found in Appendix C.

Figure 4.4.2 Barriers to more frequent participation in picnicking



Lack of time (57%) was the most frequently mentioned barrier for picnicking. This was followed by 'lack of occasions/invitations presenting (external)' (13%), 'have no one (including pets) to do this activity with' (13%), and 'bad weather (including rain or drought)' (8%).

Actionable barriers

Two of the main barriers to participating in activities more often were identified as 'actionable barriers': lack of local opportunities and lack of awareness of local opportunities. These actionable barriers, together with interest in doing activities more often, may represent unmet demand for these activities and are opportunities to increase participation. The following charts show the proportion of participants who when asked about barriers responded with an actionable barrier, for each activity. Proportion of respondents citing an actionable barrier broken down by ages and gender can be found in Appendix C.

Figure 4.4.3 Actionable barriers - Part I

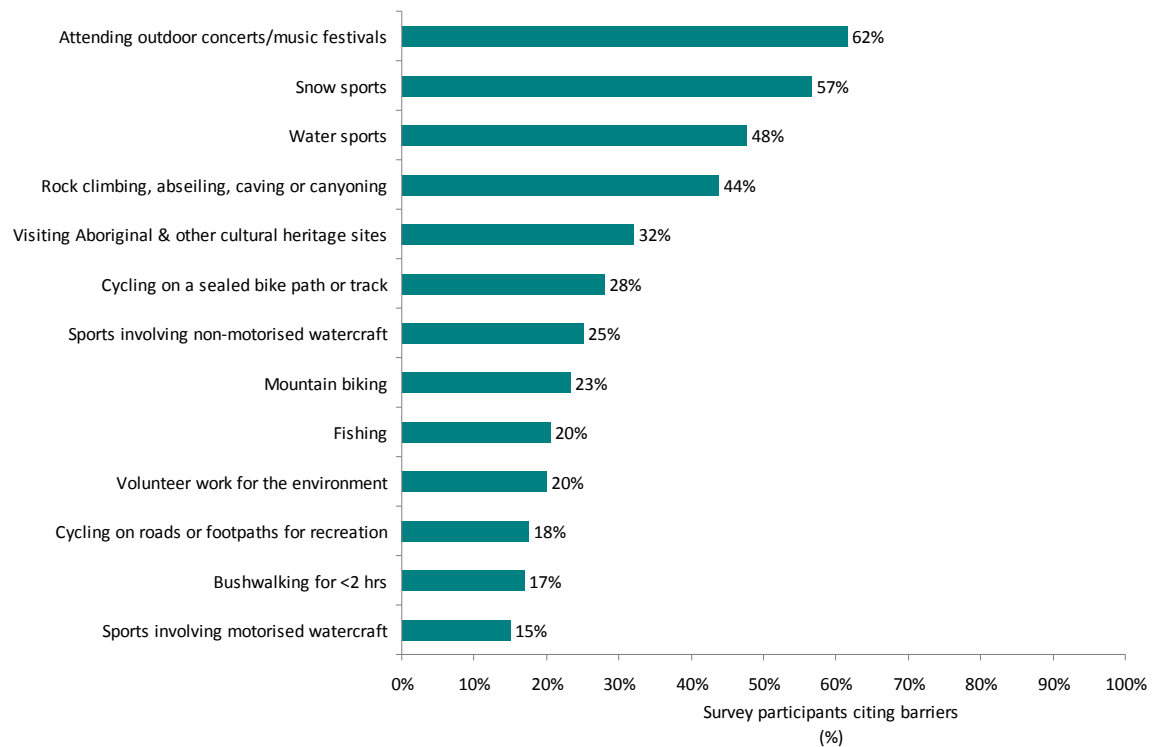
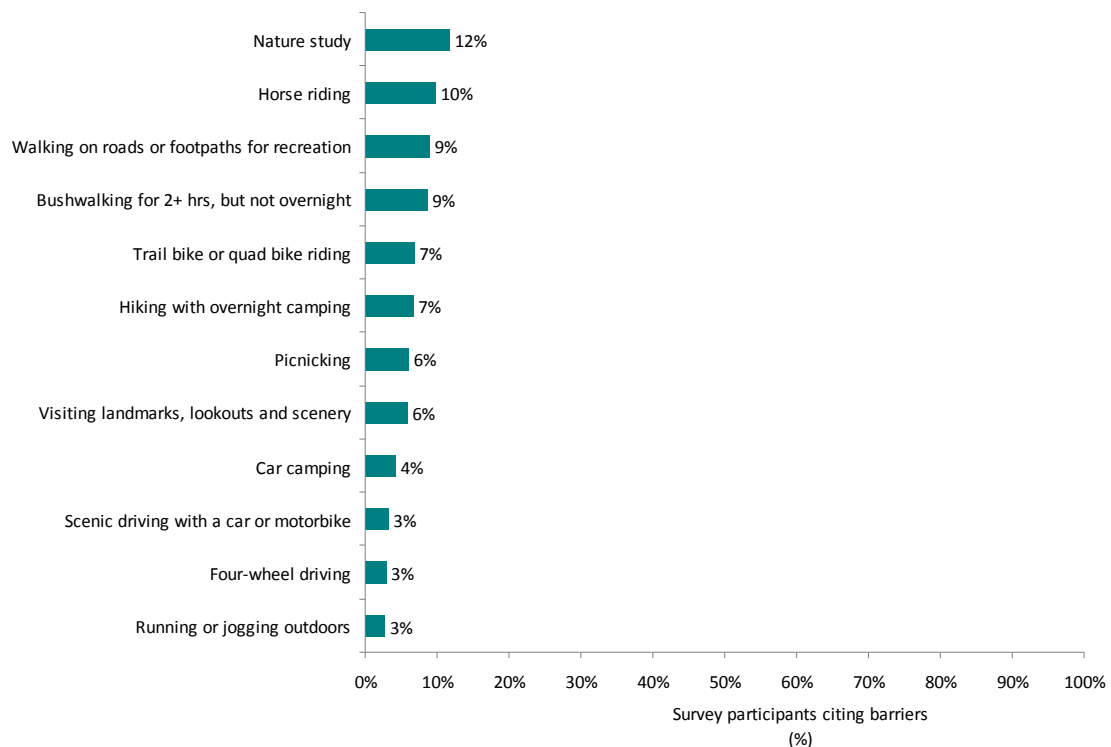


Figure 4.4.4 Actionable barriers - Part II



As Figure 4.4.3 shows, the activity with the highest proportion citing actionable barriers was 'attending outdoor concerts/music festivals', with 62% citing at least one actionable barrier. Snow sports (57%), water sports (48%), rock climbing abseiling, caving or canyoning (44%), visiting Aboriginal & other cultural heritage sites (32%), cycling on a sealed bike path or track (28%) and sports involving non-motorised watercraft (25%) all had at least one quarter citing an actionable barrier.

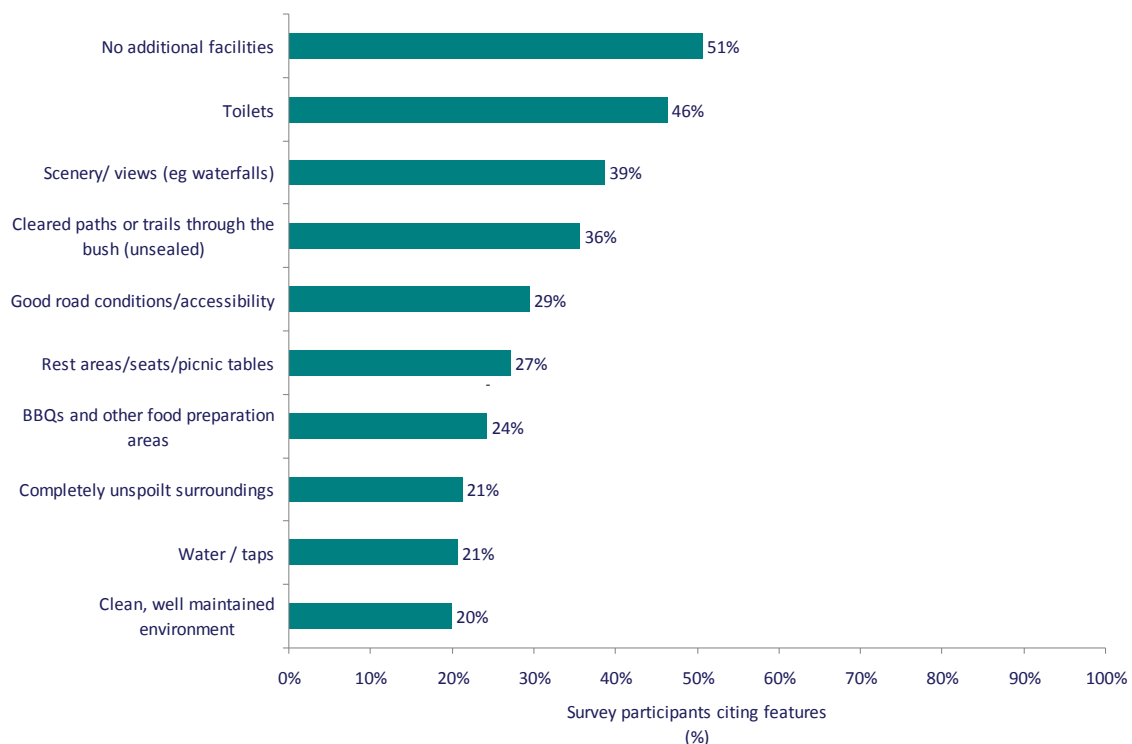
The activities with the least proportion naming actionable barriers were running or jogging outdoors (3%), four-wheel driving (3%), scenic driving with a car or motorbike (3%) and car camping (4%), as shown in Figure 4.4.4.

4.5 Preferences

Survey participants were asked to answer a further question on a subset of activities that they had either performed in the last 12 months, or indicated they would be interested in doing more often (that is, to which they gave a score of at least 5 out of 10). Survey participants were asked to imagine that they were going to do each of the activities in a National Park, State Conservation Area, State Forest or Nature Reserve in their region (but not in a local council park or botanical garden). They were then asked what would be the main features (either natural or man-made) that they would want if they were going to do the activity in one of these locations. Survey participants provided open-ended responses, which were later coded by the researchers. To reduce the burden on survey participants, they were asked to provide a response for a maximum of five activities.

The top 10 preferences overall are presented in Figure 4.5.1 (refer to Appendix C for the remainder of the features).

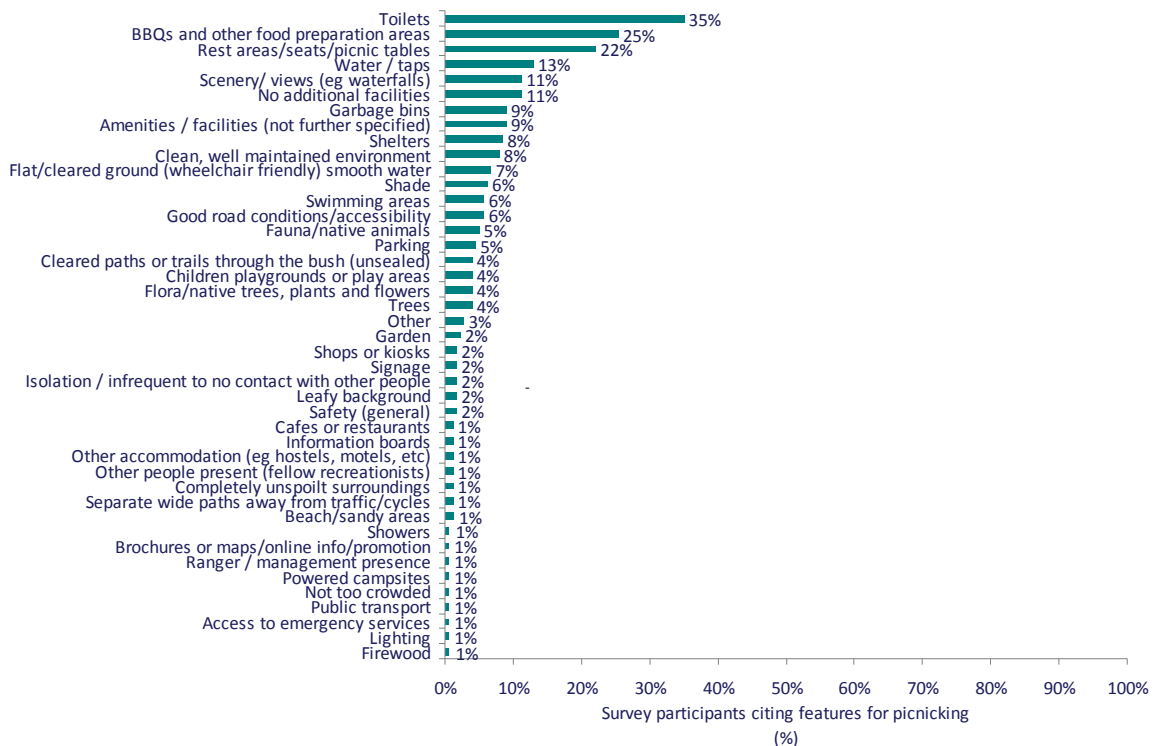
Figure 4.5.1 Top 10 preferences for participation in outdoor recreation averaged over activities



Interestingly, the most frequently requested feature across all activities was that no additional features were required (51%). The next most common response was toilets (46%). This was followed by scenery/views (e.g. waterfalls) (39%), cleared paths or trails through the bush (unsealed) (36%), and good road conditions/accessibility (29%).

The preferences for picnicking, the outdoor recreation activity for which there was the greatest interest in participating more often, are outlined in Figure 4.5.2. The preferences for the remainder of the activities can be found in Appendix C.

Figure 4.5.2 Preferences for picnicking



Toilets (35%) were the most requested preference for picnicking, followed by BBQs and other food preparation areas (25%), rest areas/seats/picnic tables (22%), water/taps (13%), scenery/views (e.g. waterfalls) (11%) and no additional features required (11%).

4.6 Motivations

Lastly, survey participants were asked to indicate the extent to which a list of statements describing motivations to participate in outdoor recreation applied to them, on a scale of 0 to 10, where 0 was not at all and 10 was extremely.

Mean ratings of personal applicability of each of the motivations to participate in outdoor recreation activities are presented in Figures 4.6.1 and 4.6.2.

Figure 4.6.1 Mean ratings of personal applicability of motivations to participate in outdoor recreation activities– Part I

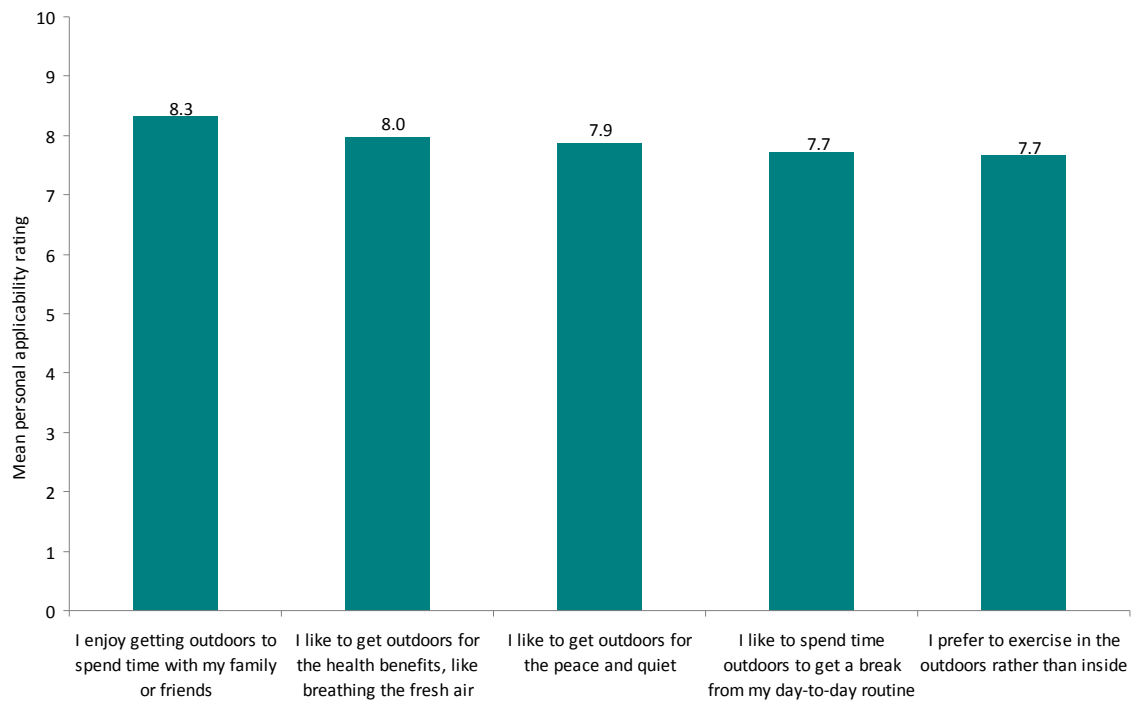
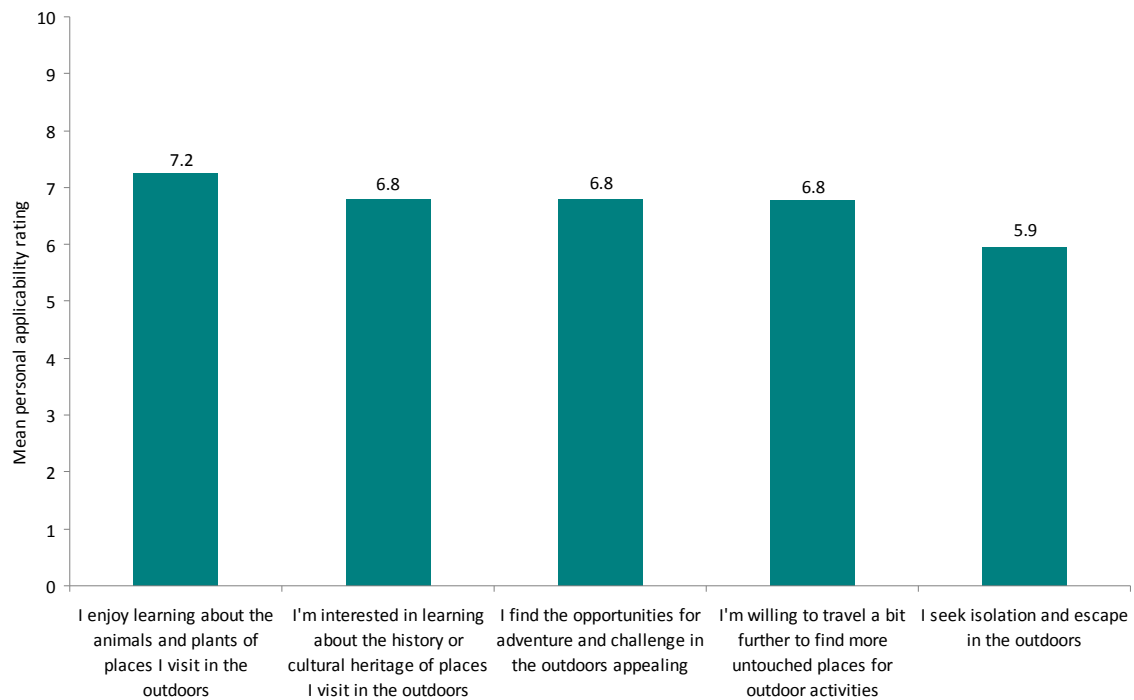


Figure 4.6.2 Mean ratings of personal applicability of motivations to participate in outdoor recreation activities– Part II



As the figures above show, the three highest rated motivations were 'I enjoy getting outdoors to spend time with my family or friends' (8.3 out of 10), 'I like to get outdoors for the health benefits, like breathing the fresh air' (8.0) and 'I like to get outdoors for the peace and quiet' (7.9).

Mean ratings of personal applicability of each of the motivations to participate in outdoor recreation activities broken down by age and gender are presented in Table 4.6.2.

Table 4.6.2 Mean ratings of personal applicability of motivations to participate in outdoor recreation activities by age and gender

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
I enjoy getting outdoors to spend time with my family or friends	8.6	8.5	8.3	8.0	8.7	8.6	8.4	8.3	8.3
I like to get outdoors for the health benefits, like breathing the fresh air	7.4	7.2	7.7	8.1	7.6	7.7	7.9	8.5	8.0
I like to get outdoors for the peace and quiet	7.7	7.7	8.0	7.8	7.4	7.3	7.07	8.3	7.9
I like to spend time outdoors to get a break from my day-to-day routine	6.9	7.4	8.0	7.6	6.9	7.2	8.0	8.2	7.7
I prefer to exercise in the outdoors rather than inside	8.3	7.6	8.0	7.8	7.5	7.3	7.5	7.6	7.7
I enjoy learning about the animals and plants of places I visit in the outdoors	6.1	6.8	7.4	7.5	6.6	6.5	7.2	7.6	7.2
I'm interested in learning about the history or cultural heritage of places I visit in the outdoors	4.9	6.2	6.9	7.0	5.7	6.6	7.0	7.2	6.8
I find the opportunities for adventure and challenge in the outdoors appealing	7.8	7.7	7.8	6.7	7.0	6.0	6.4	6.5	6.8
I'm willing to travel a bit further to find more untouched places for outdoor activities	6.1	7.2	7.1	7.3	7.4	5.8	6.3	6.6	6.8
I seek isolation and escape in the outdoors	5.8	6.1	6.9	6.0	6.4	4.4	5.5	6.3	5.9

Among age and gender groups, it was found that females in the 25-34 age group had a significantly lower mean rating for the motivation 'I seek isolation and escape in the outdoors' (4.4).

There were no notable differences in motivations for those who either participated in or were highly interested in participating more often in different types of outdoor recreation activities. Those tables are found in Appendix C.

4.7 Forecasting future participation

Demographic approach

Scenario 1: Participation changes due to demographic change in population

Future participation figures for the year 2018 were estimated for each of the outdoor recreation activities for the last 12 months by multiplying:

- the mean frequency of participation (including both participants and non-participants); and
- the number of people in each age by gender group in the projected population for that region.

The projected population was determined by weighting each age and gender subgroup by weights according to the changes in population across NSW estimated by the Australian Bureau of Statistics². These weights are found in Appendix D. This method adjusts for both change in demographic profile (age by gender groups) and change in absolute size of the population, and estimated population figures. An assumption of this approach is that recreational interests stay the same within age/gender groups (e.g. a constant proportion of 30 year old males will continue to be interested in bike riding).

In contrast, a cohort approach assumes that interests are carried by individuals across age groups (e.g. a constant proportion of "2009's 30 year old males" will continue to be interested in bike riding, even as they age). It can be seen that both approaches rest upon assumptions that may, in time, prove incorrect. For that reason, we have looked at each scenario under both the cohort and demographic approach in this section.

² Based on Australian Bureau of Statistics 3222.0 Population Projections, Australia, TABLE B1. Population projections, By age and sex, New South Wales - Series B. Series B largely reflects current trends in fertility, life expectancy at birth, net overseas migration and net interstate migration.

Total current and estimated total participation figures for 2018 for each of the outdoor recreation activities are presented in Figures 4.7.1 and 4.7.2. Please note that the current participation figures will differ slightly from those reported in the table in Section 4.2 and tables in Appendix C, as the 45-75 age group was split into three 10-year age bands for forecasting.

Figure 4.7.1 Total current and predicted future participation in outdoor recreation activities – Part I

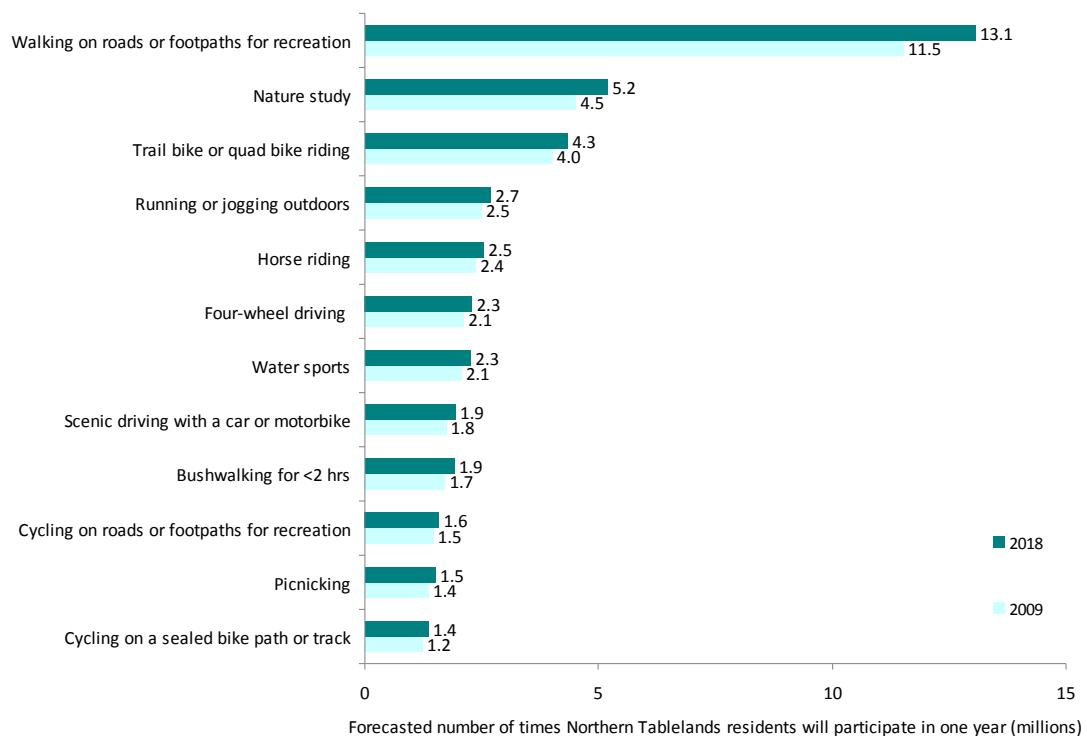
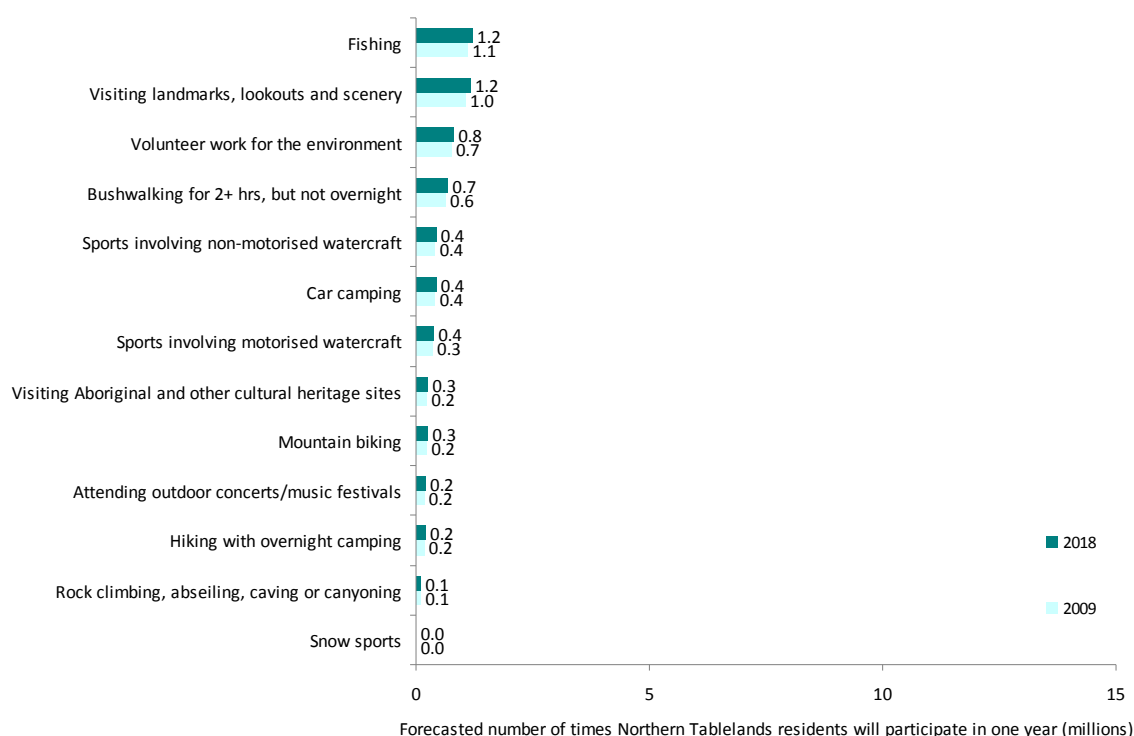


Figure 4.7.2 Total current and predicted future participation in outdoor recreation activities – Part II



Changes to the demographic (age x gender) profile of the NSW adult population are not substantial over the period 2009 to 2018. The greatest change over this period is clearly in terms of absolute population, which is projected to increase in NSW by 11%. This, however, only results in an absolute increase in the number of people participating in the activities, rather than relative changes in the popularity of different activities.

Scenario 2: Actionable barriers are addressed and both participation and frequency increase

A second forecasting analysis was conducted to include an estimation of how participation rates and frequencies may change if PWG was to address two of the main 'actionable barriers' in relation to each of the outdoor recreation activities: lack of local opportunities and lack of awareness of local opportunities. The forecasted level of participation was derived from the participant's current frequency of participation, stated interest in doing the activity more often, and the proportion who cited actionable barriers for that activity. The technique used to model frequency is described in further detail in Appendix D.

Estimated total participation figures for 2018, assuming PWG was to provide new opportunities and market the range of opportunities for the activity in the local area, and estimating impacts

on frequencies, for each of the outdoor recreation activities are presented in Figures 4.7.3 and 4.7.4.

Figure 4.7.3 Total current and predicted future participation in outdoor recreation activities, including if actionable barriers are addressed, and adjusting for frequency – Part I

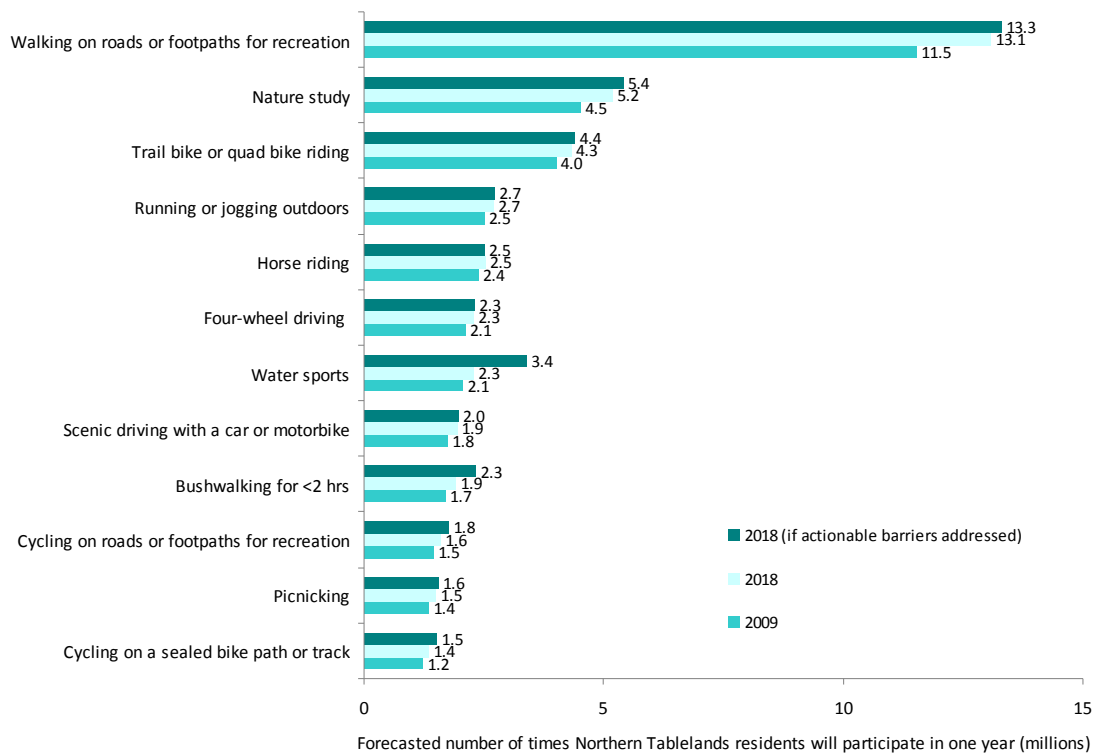
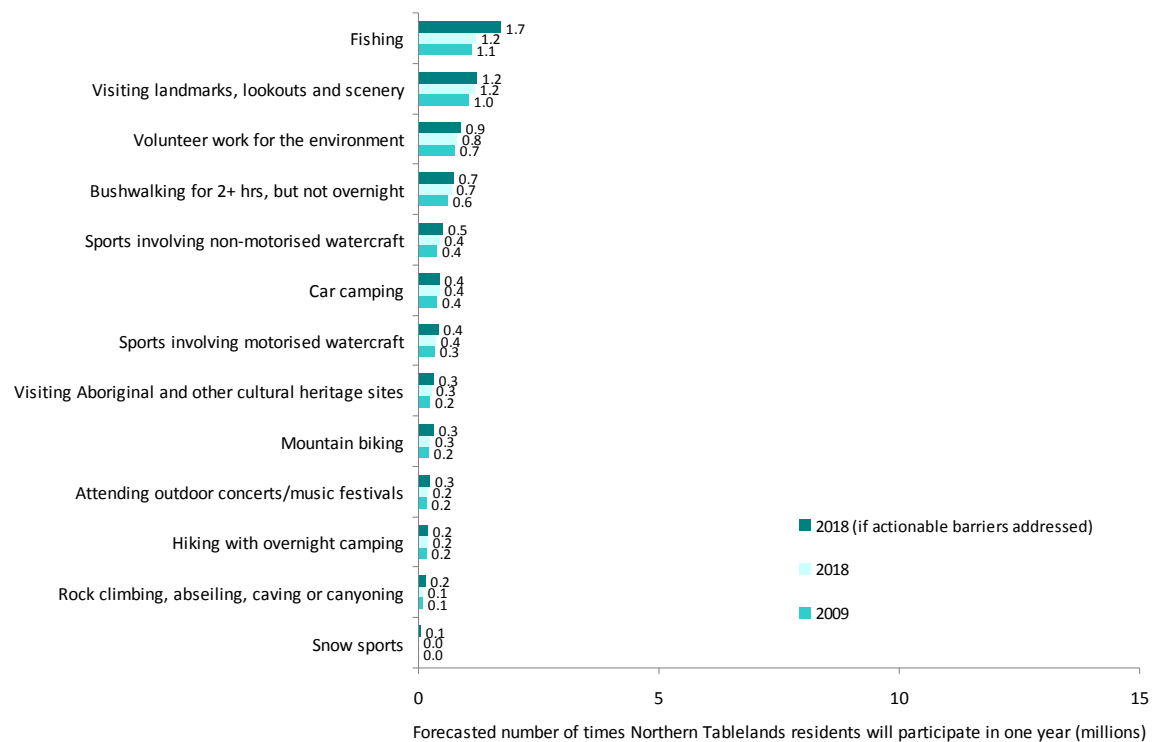


Figure 4.7.4 Total current and predicted future participation in outdoor recreation activities, including if actionable barriers are addressed, and adjusting for frequency – Part II



As can be seen, this modelling approach leads to greater changes in predicted participation. The highest increase in future annual participation should actionable barriers be addressed is for water sports, rising from a predicted 2.3 million events in 2018 to 3.4 million events if actionable barriers are addressed (an increase of 1.1 million events). The smallest increase in future annual participation, should actionable barriers be addressed, were for the activities running or jogging outdoors, horse riding, four-wheel driving, visiting landmarks, lookouts and scenery, car camping, sports involving motorised watercraft, visiting Aboriginal and other cultural heritage sites, mountain biking, and hiking with overnight camping, which were all estimated to rise by less than 0.1 million events if actionable barriers are addressed.

The following charts show the difference between 2009 and 2018 in both scenarios, firstly in terms of forecasted number of times, then in terms of percentage.

Figure 4.7.5 Forecasted changes in total participation - Part I

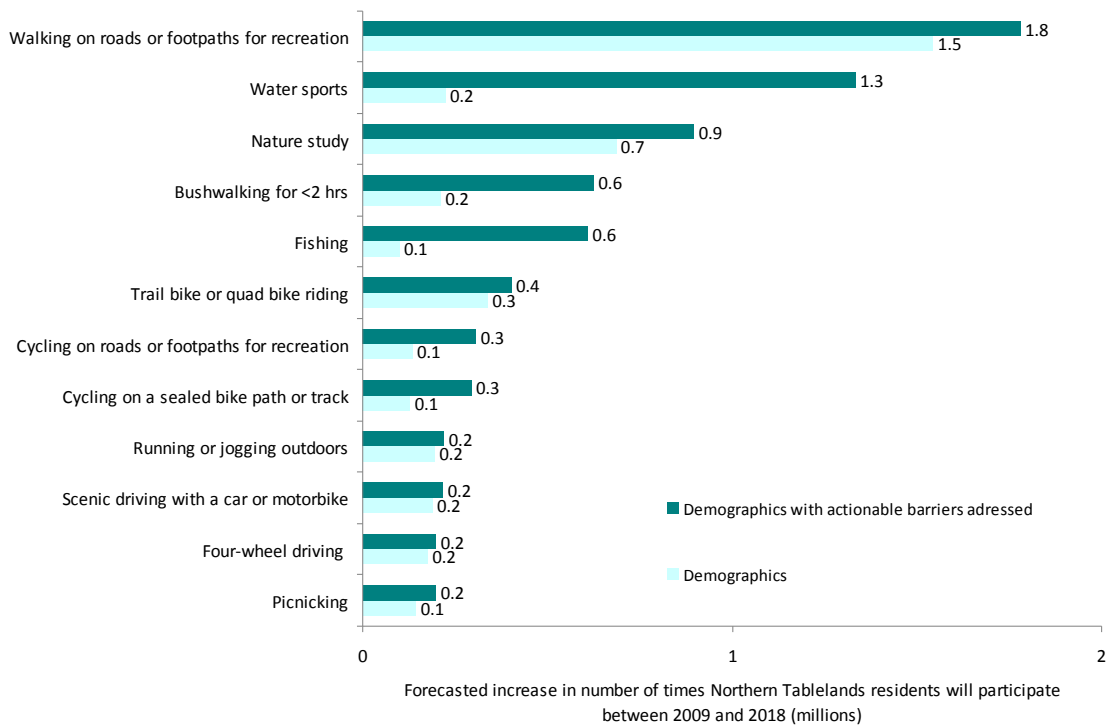
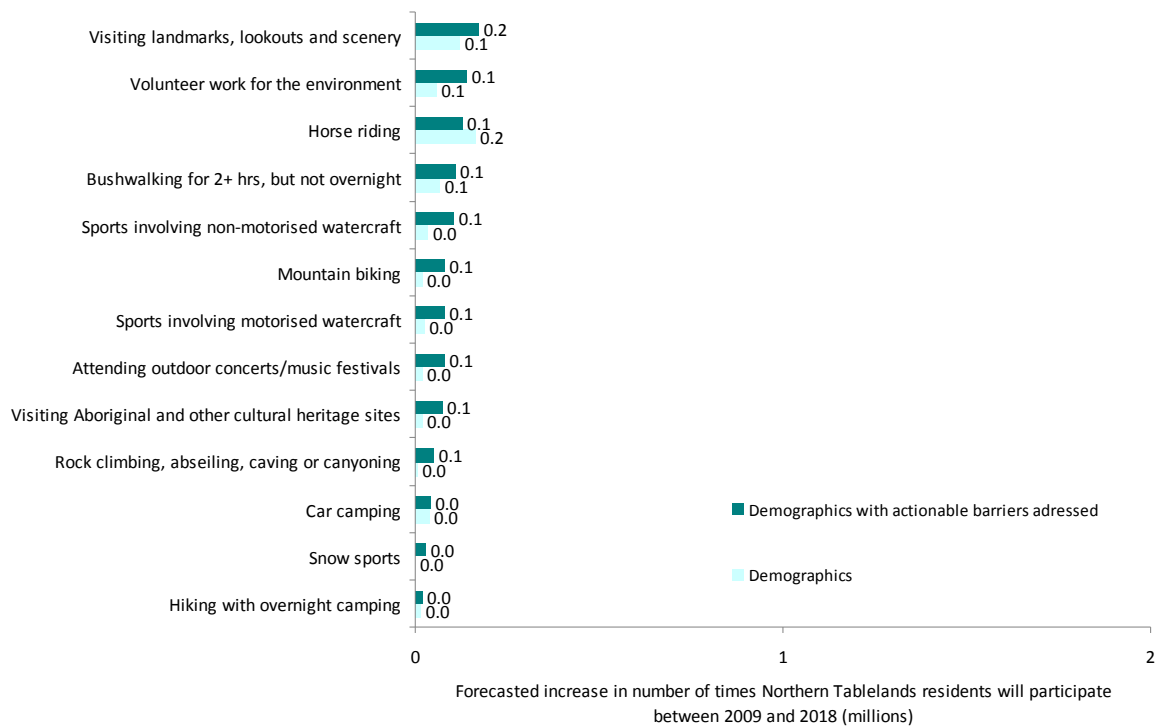


Figure 4.7.6 Forecasted changes in total participation - Part II



As the Figure 4.7.5 shows, walking on roads or footpaths for recreation will have the largest increase in total participation in 2018, rising by 1.5 million events in 2018 and by 1.8 million events if actionable barriers are addressed.

The lowest change in total annual participation from 2009 to 2018 is predicted for car camping, snow sports, and hiking with overnight camping, rising by less than 0.1 million events in 2018 and by less than 0.1 million events if actionable barriers are addressed, as shown in Figure 4.7.6.

The next two charts look at the percentage change in annual participation under the two scenarios.

Figure 4.7.7 Forecasted changes (%) in total participation - Part I

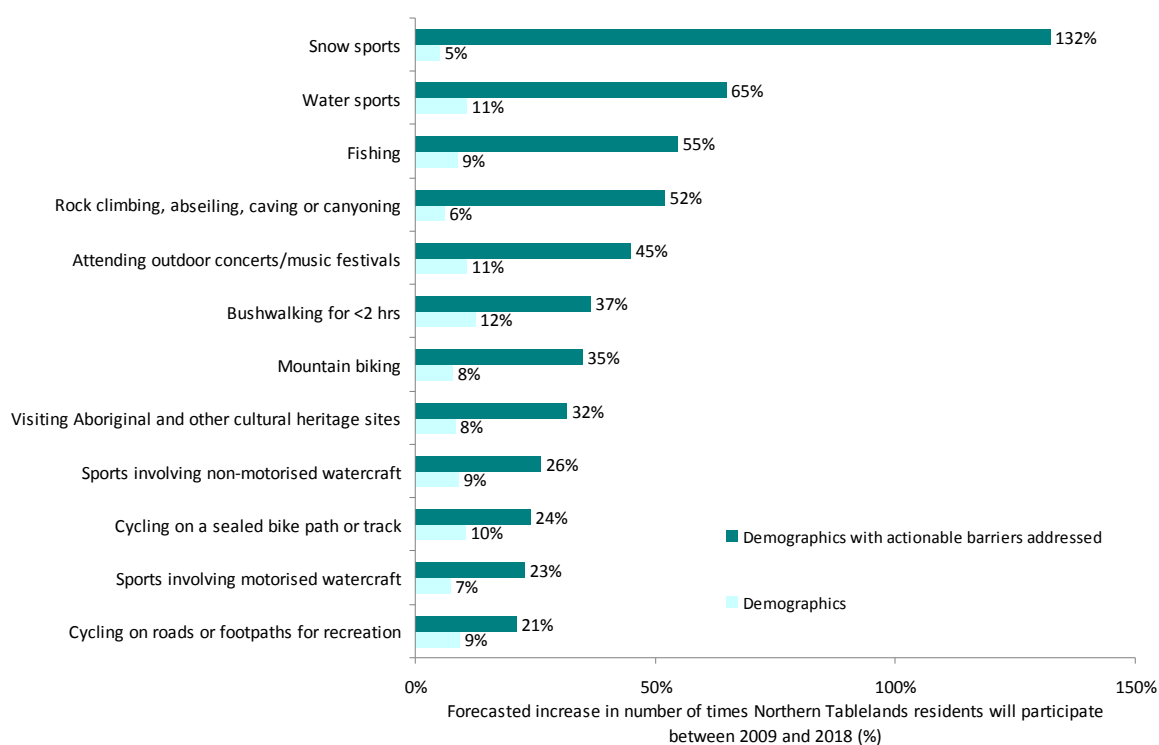
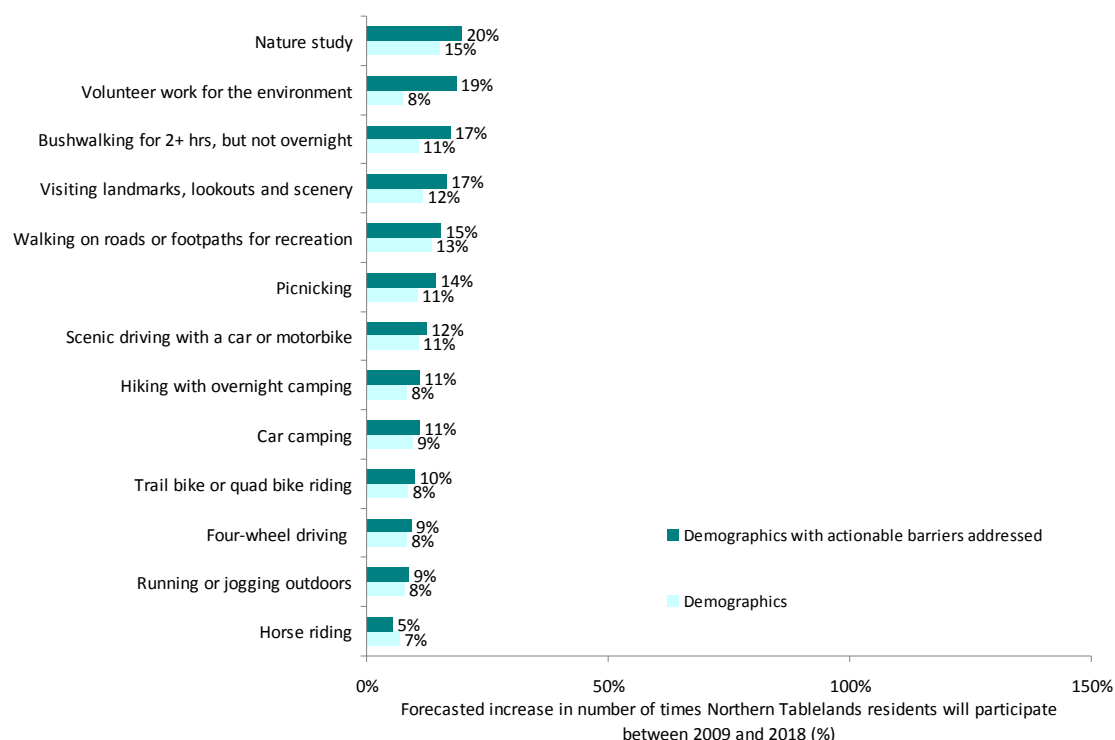


Figure 4.7.8 Forecasted changes (%) in total participation - Part II



As Figure 4.7.7 shows, it is predicted that snow sports will increase by 132% in 2018 if actionable barriers are addressed. This is followed by water sports (65%), fishing (55%), rock climbing, abseiling, caving or canyoning (52%), and attending outdoor concerts/music festivals (45%). These large percentage increases are for activities that have generally have lower frequencies of current participation. A closer look reveals that snow sports has an average interest rating of 2.8, which is at the lower end of all activities. However, the spike in predicted activity is partly due to the high level of actionable barriers for this activity (57%, although it may be argued that provision of local opportunities for snow sports may be difficult to action). The increase in predicted activity is also due to the pattern of participation in these less frequent activities. To show the pattern in demand for each activity, current participants were split into quintiles, based on the number of times they had participated in the activity in the past 12 months.

The following charts show the contribution to the total number of events that each quintile makes. Note that for some activities, there is not sufficient variability at the lower ends of frequency to split the sample into quintiles. For example, for the activity snow sports, the cut-off for the first quintile is 1 time per year, and this 'quintile' actually makes up 54% of total participants. Therefore the next cut-off, of 2 times per year, is shown in the chart as the 3rd quintile, and makes up 8% of total participants.

Figure 4.7.9. Contribution of each quintile to total participation in activities - Part I

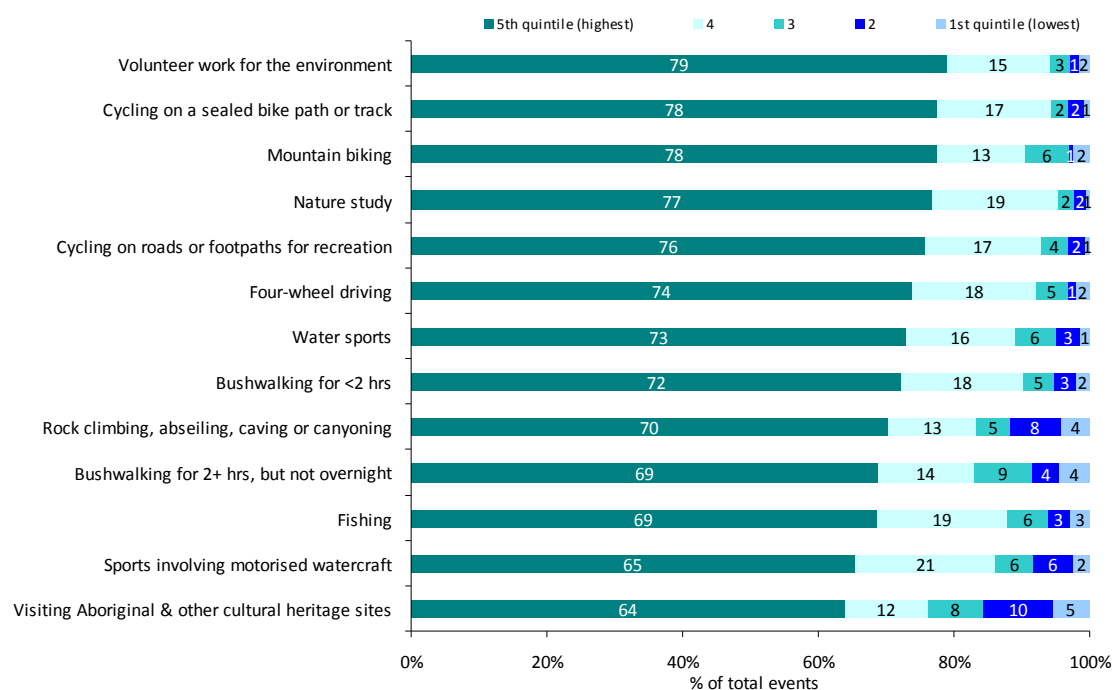
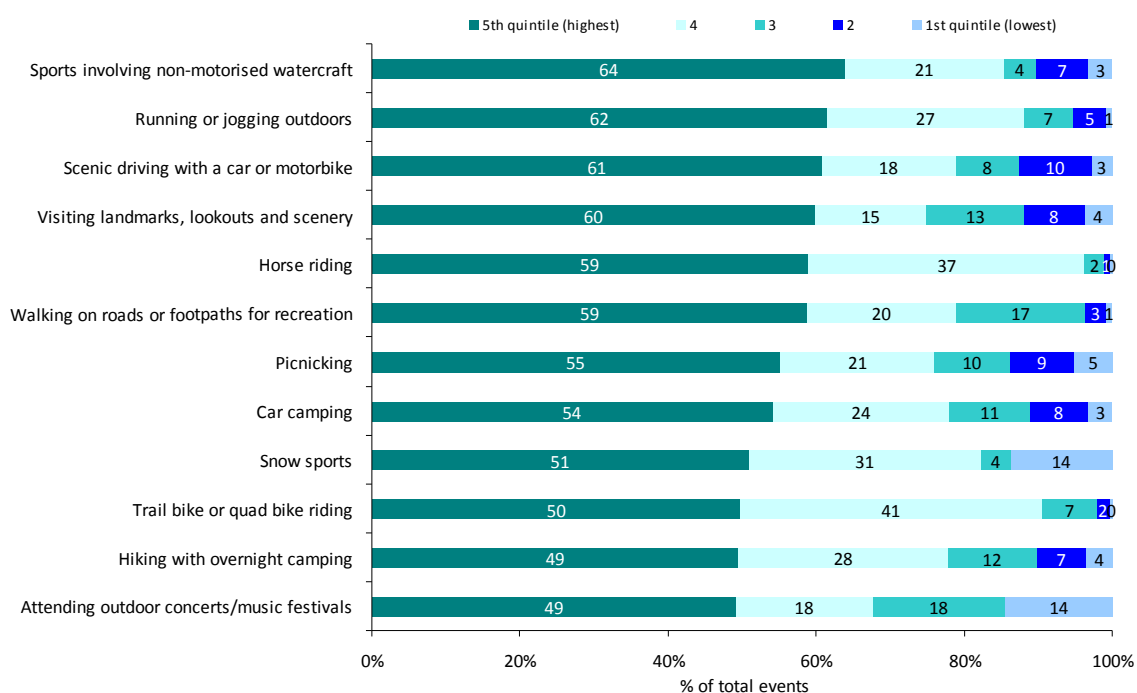


Figure 4.7.10. Contribution of each quintile to total participation in activities - Part II



As Figures 4.7.9 and 4.7.10 show, for volunteer work for the environment, the highest quintile contributes 79% of total volunteering. The activities hiking with overnight camping and

attending outdoor concerts/music festivals had the most equitable distributions, with the top quintile making up less than half of the total events.

The skews in demand can partly explain the higher predicted increases for water sports and rock climbing, abseiling, caving or canyoning. Also, the relatively high proportion of actionable barriers for snow sports, water sports, rock climbing, abseiling, caving or canyoning, and attending outdoor concerts/music festivals can partly explain the large predicted increase in these events.

The next section replicates the two scenarios using the cohort approach.

Cohort approach

Scenario 1: Participation changes due to demographic change in population - Cohort approach

The cohort approach uses current participation and frequency rates for each age group and multiplies them by the projected population in 9 years time. For instance, the current participation rate among 25-34 year old males for walking (61%) is multiplied by the mean frequency for 25-34 year old male participants (61 times a year) and then multiplied by the projected population of 34-43 year old males in 2018 (15,583) to estimate the cohort in 2018. For the younger population, we have assumed that 18-26 year olds in 2018 will be participating in the same way as 18-24 year olds are currently. The weights used to estimate the population in 2018 are found in Appendix D.

As the following charts show, the cohort approach shows little differences in many activities.

Figure 4.7.11. Total current and predicted future participation in outdoor recreation activities, cohort approach– Part I

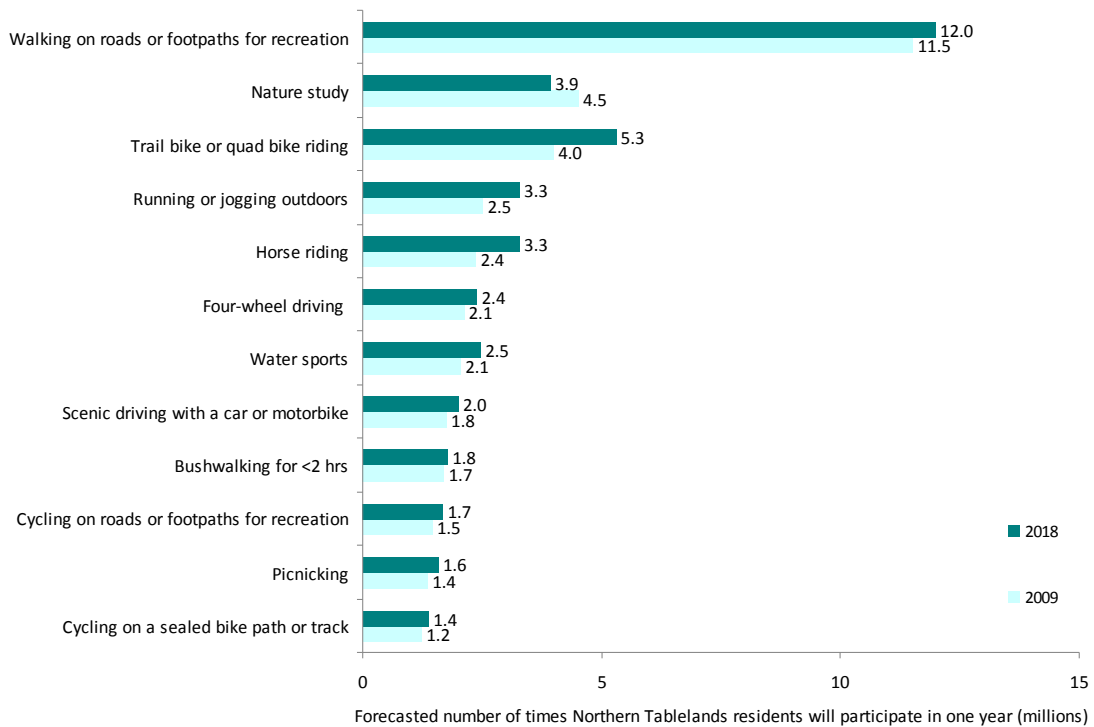
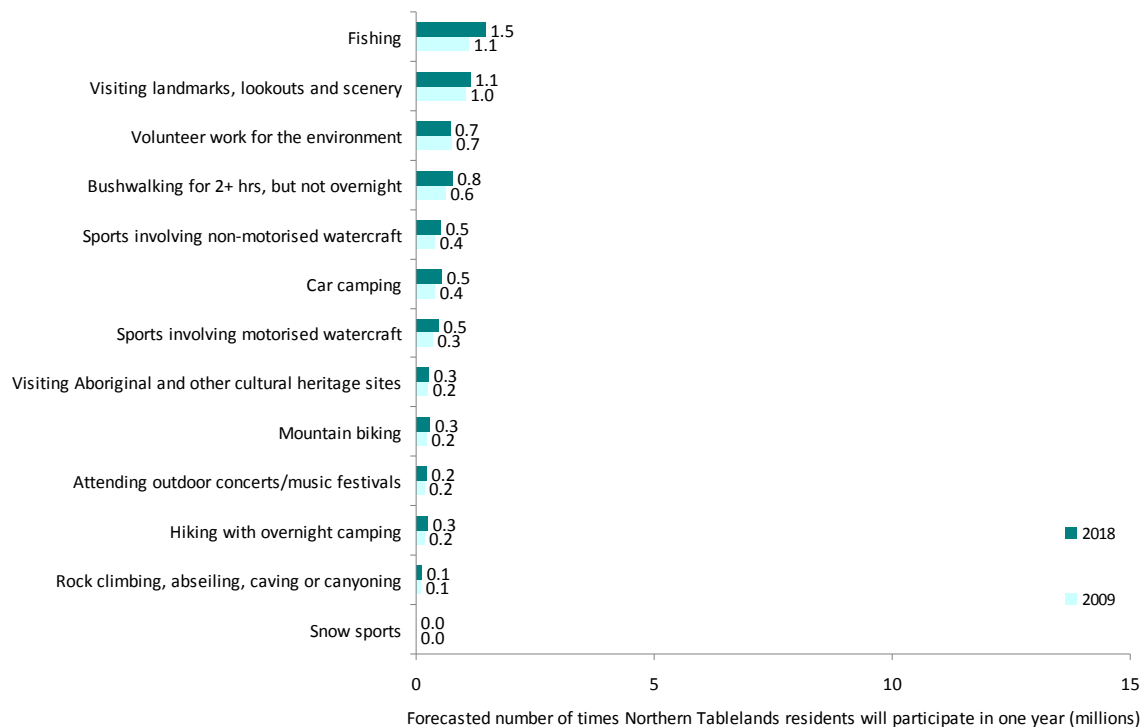


Figure 4.7.12. Total current and predicted future participation in outdoor recreation activities, cohort approach– Part II



As the chart above shows, there were few large increases in any activities. The largest increase predicted was for trail or quad bike riding, rising from 4.0 million to 5.3 million events. The cohort approach predicts a decline in nature study from 4.5 million to 3.9 million events.

Scenario 2: Actionable barriers are addressed and both participation and frequency increase - Cohort approach

The projected population used in these estimations are derived from the cohort approach. The following charts show the predicted changes in total events.

Figure 4.7.13 Total current and predicted future participation in outdoor recreation activities, including if actionable barriers are addressed, and adjusting for frequency (cohorts)– Part I

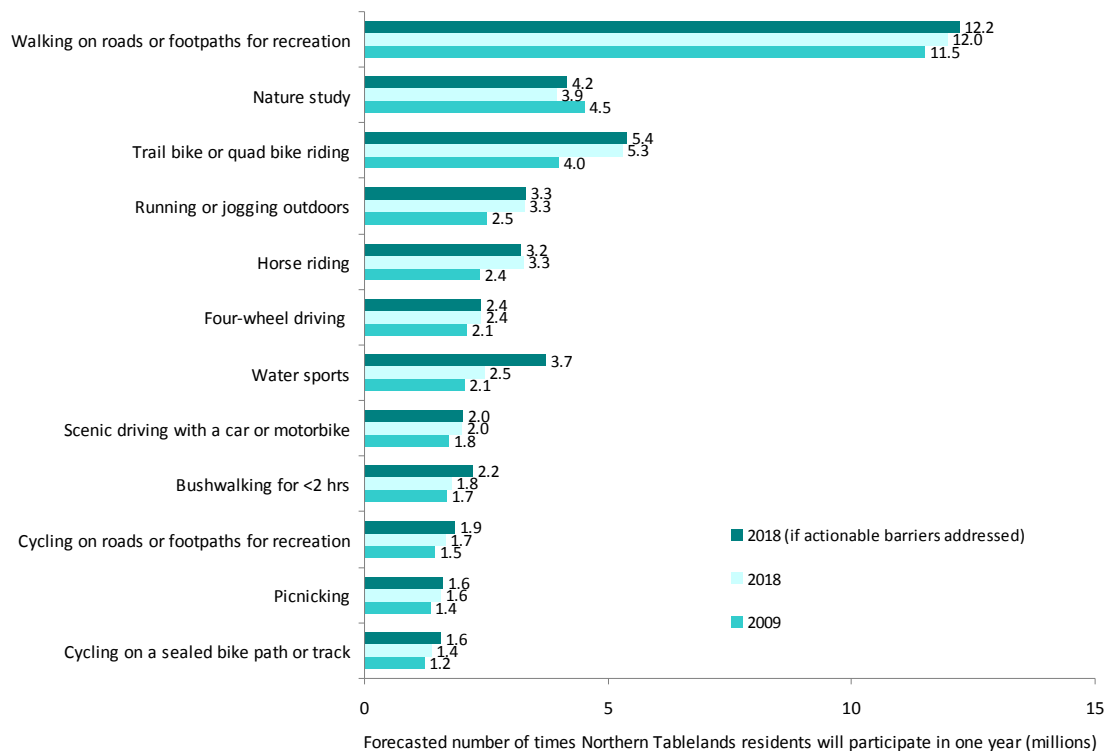
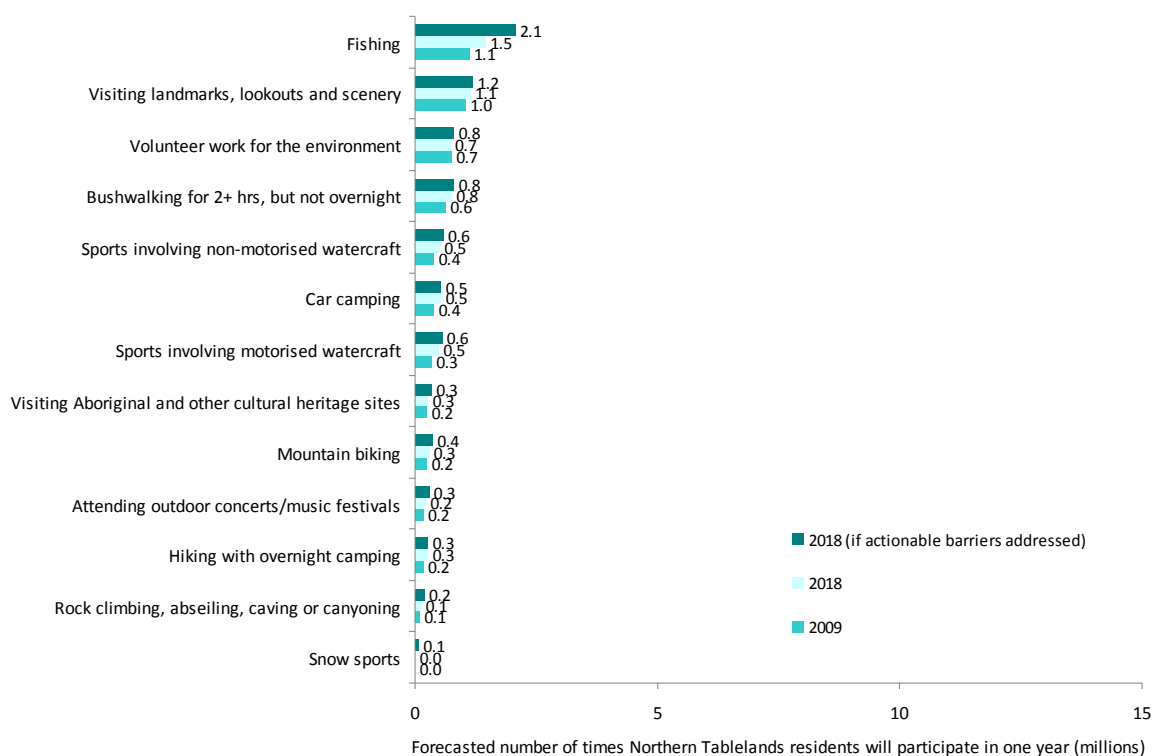


Figure 4.7.14 Total current and predicted future participation in outdoor recreation activities, including if actionable barriers are addressed, and adjusting for frequency (cohorts) – Part II



As Figure 4.7.13 and 4.7.14 show, when modelling for the effect of addressing actionable barriers on frequency, there are few large increases in predicted events. The largest increase is for water sports, with a further 1.2 million events predicted should actionable barriers be addressed.

Contrasting the two approaches

The assumptions of the two approaches lead to different results. The cohort approach, by only looking at the population from 18-75 and estimating its frequency of participation in 9 years time makes assumptions about the participation levels of those currently aged 9 to 17 years, which are not measured in this study. Further, the qualitative research conducted in an earlier phase of the project found that frequency of participation varied among participants as they got older.

As described earlier, the demographic approach assumes that today's 30 year olds will act in the same way as the 30 year olds of 2018. It will neglect some of the generational differences identified in the qualitative research, particularly that lifestyle trends may continue the apparent shift away from outdoor activities for younger age groups.

The following charts show the predicted difference between 2009 and 2018 in both scenarios, under both the demographic and cohort approaches.

Figure 4.7.15. Forecasted changes in total participation - Part I

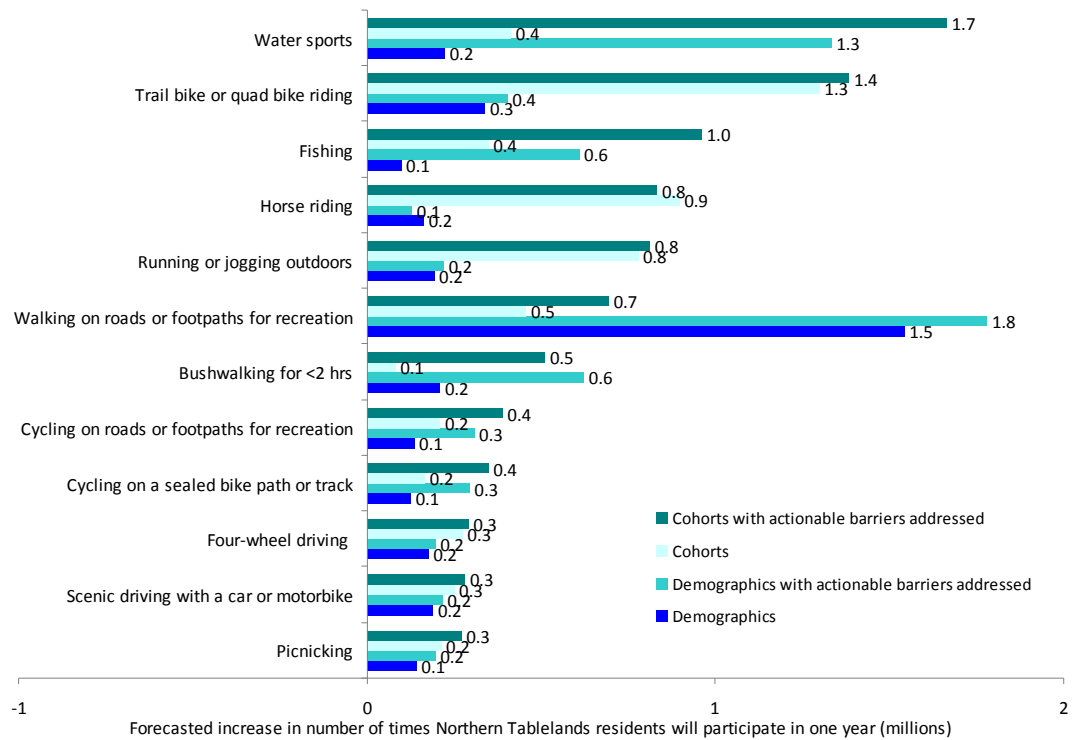
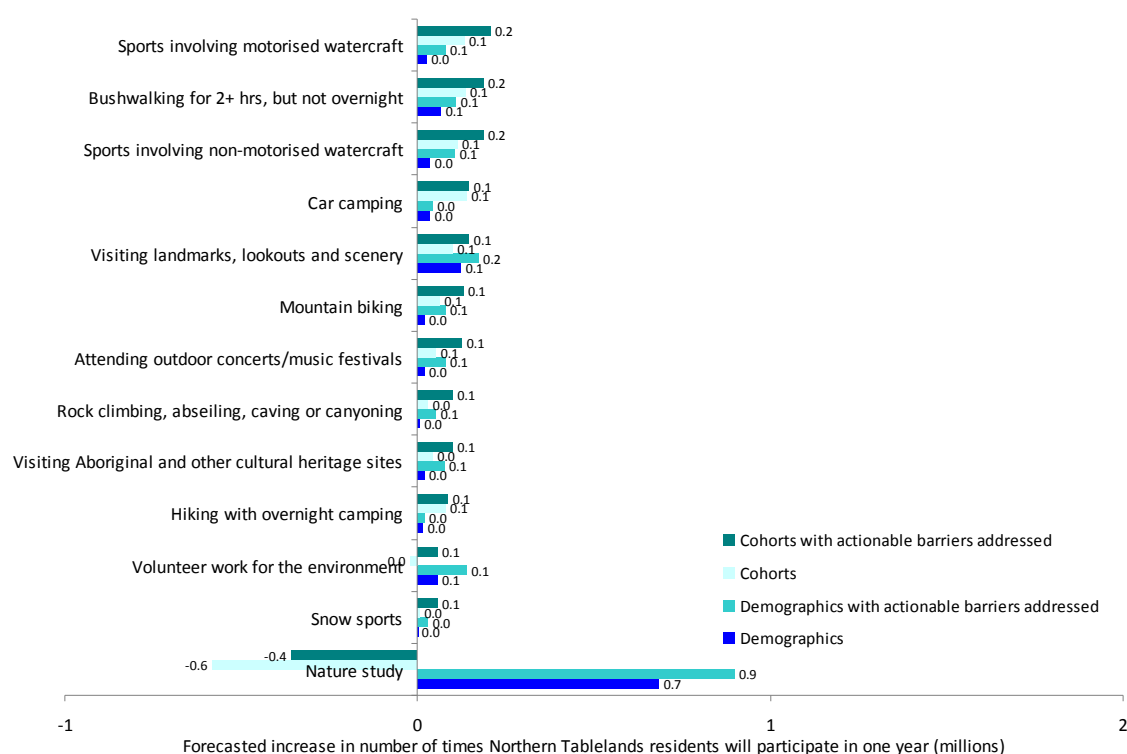


Figure 4.7.16. Forecasted changes in total participation - Part II



As the charts above show, the cohort approach leads to a higher increase predicted in total events for running or jogging outdoors, with an increase of 0.8 million events for the cohort approach compared to 0.2 million events for the demographics approach. Running or jogging outdoors has a higher frequency among 18-24 year olds than other age groups, so the cohort approach's assumptions lead to a higher estimate of future participation for this activity, and similar activities that are more frequent among younger age groups.

The next set of charts show the percentage increase for both scenarios under the two approaches.

Figure 4.7.17 Forecasted changes (%) in total participation - Part I

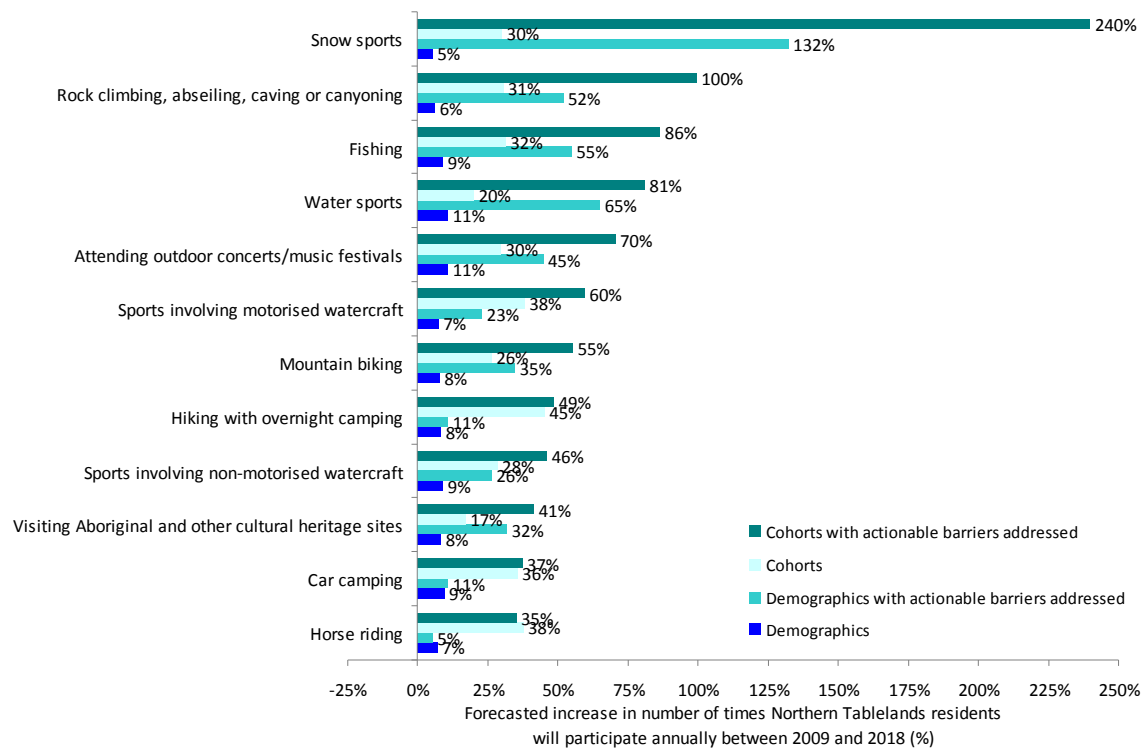
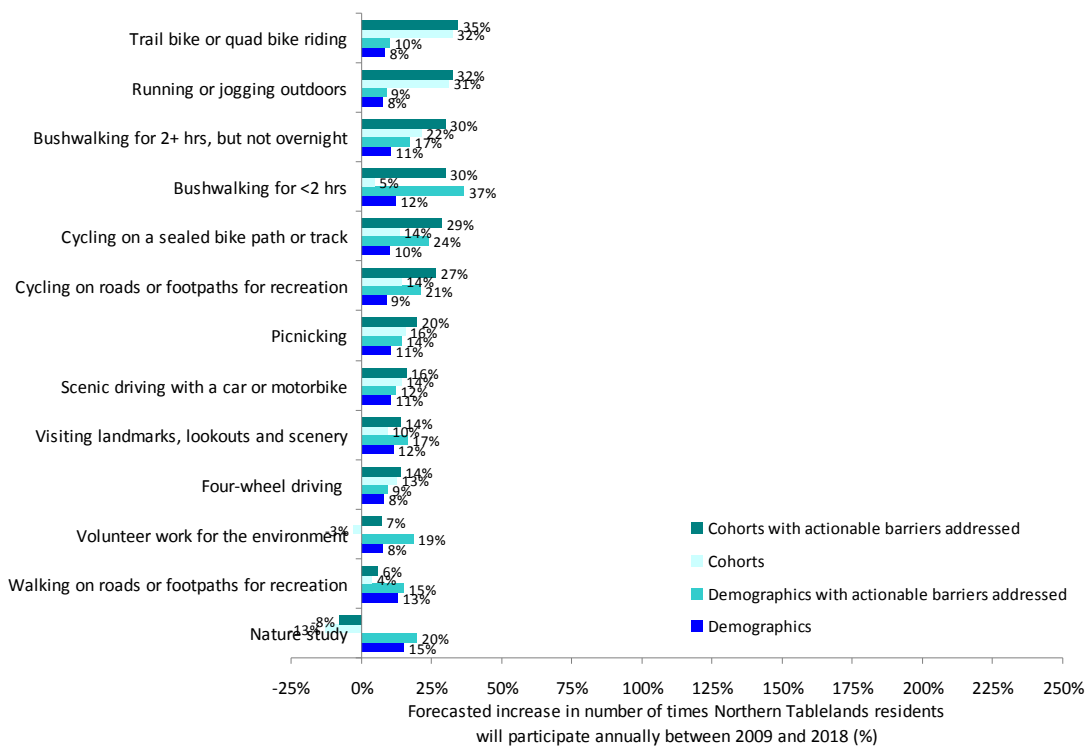


Figure 4.7.18 Forecasted changes (%) in total participation - Part II



As Figures 4.7.17 and 4.7.18 show, the predicted increase in percentage varied between the cohort and demographic approaches, particularly in activities that had a bias in frequency of participation towards the youngest age groups, such as horse riding, and oldest age groups, such as nature study.

A

APPENDIX A: QUESTIONNAIRE

NATURE-BASED OUTDOOR RECREATION SURVEY Ipsos Public Affairs project #4272

To be administered using computer-assisted telephone interviewing. Headings will not appear in field version.

PLEASE REFER TO EXCEL FILE FOR POSTCODES INCLUDED IN EACH OF THE REGIONS.

PLEASE OBSERVE THE FOLLOWING QUOTAS.

Gender	Age group	Greater Sydney	North Coast	New England Tablelands	Western NSW	South Coast	Southern Tablelands
Male	18-34	141	53	56	56	55	70
	35-54	160	80	79	82	77	81
	55-75	94	64	62	63	64	48
Female	18-34	143	53	58	55	54	69
	35-54	165	84	82	82	83	83
	55-75	97	66	63	62	67	49
Total (N=2,800)		800 (100%)	400 (100%)	400 (100%)	400 (100%)	400 (100%)	400 (100%)

Introduction

Hello, my name is [INTERVIEWER] and I'm calling from Ipsos-Eureka Social Research Institute.

We are conducting a research project on outdoor recreation on behalf of a NSW Government department. We are not trying to sell you anything; your responses will be used only for

research purposes and will remain confidential. The survey will take around [AVERAGE DURATION].

IF TIME INCONVENIENT, ARRANGE CALL BACK

IF NOT INTERESTED: Is there anyone else over 18 who might be interested in participating?

IF CLIENT QUERIED: I'm sorry, I can't tell you the client's name until the end of the survey, because it might affect the way you answer the questions, but I will be able to tell you at the end.

IF QUERIED ABOUT BONA FIDES OF RESEARCH: I can provide the names of people who will verify the legitimate nature of this research project. The first is the Australian Market and Social Research Society enquiry line on 1300 36 4830. The second is the Project Manager at Ipsos-Eureka Social Research Institute, Ben Barnes, on (02) 9550 5100.

IF QUERIED ABOUT HOW NAME WAS SOURCED: We are contacting people using random digit dialling.

IF THE INTERVIEW WILL BE MONITORED: My supervisor may be monitoring the interview for quality control purposes. If you do not wish this to occur, please let me know.

Screening

First let me check that you are one of the people we need to talk to.

S1. Can you tell me your postcode? [RECORD. OBSERVE QUOTAS FOR LOCATION.] [IF NOT RECOGNISED, ASK WHETHER IN NSW. IF NOT, TERMINATE WITH THANKS, IF IN NSW, ASK FOR TOWN OR SUBURB, OR NEAREST TOWN OR SUBURB IF RURAL/REMOTE. IF REFUSE ON THIS QUESTION, TERMINATE WITH THANKS.]

S2. [RECORD GENDER. OBSERVE QUOTAS WITHIN LOCATION.]

S3. Into which of the following age bands do you fall? [READ OUT.]

Under 18 years	DOES NOT QUALIFY
18-24 years	OBSERVE QUOTAS
25-34	OBSERVE QUOTAS
35-44	OBSERVE QUOTAS
45-54	OBSERVE QUOTAS
55-64	OBSERVE QUOTAS



Ipsos-Eureka
Social Research Institute

65-75	OBSERVE QUOTAS
Over 75 years	DOES NOT QUALIFY
REFUSED	DOES NOT QUALIFY

IF DOES NOT QUALIFY: Unfortunately you're not one of the people we need to talk to for this particular survey. Thanks for being willing to participate.

1 Participation in nature-based outdoor recreation

Great, you're definitely one of the people we need to talk to. First, I'm going to read out a list of outdoor activities, and I'd like you to give me an estimate of **how many times** you've done them **in the last 12 months**.

If you've done the activity, I'd like to know whether that's been in the [INSERT NAME OF AREA: GREATER SYDNEY / NEW ENGLAND TABLELANDS / NORTH COAST / WESTERN NSW / SOUTH COAST / SOUTHERN TABLELANDS] area, or somewhere else in NSW, or both.

And I'd also like you to tell me **how interested** you would be in doing each activity more often, if there was nothing stopping you from doing so. I'll prompt you as we go along.

- 1.1 So, the first one is [RANDOMISE. READ OUT FIRST ACTIVITY]. How many times would you have done that in the last 12 months? [RECORD NUMBER. IF UNSURE, PROBE FOR BEST ESTIMATE. NOTE THIS QUESTION IS ABOUT NUMBER OF TIMES, NOT NUMBER OF DAYS]
- 1.2 [IF Q1.1>1. EXCEPT DO NOT ASK FOR K. SNOW SPORTS UNLESS IN SOUTHERN TABLELANDS.] Was that in your local area, or further away, or both. [IF Q1.1=1 EXCEPT DO NOT ASK FOR K. SNOW SPORTS UNLESS IN SOUTHERN TABLELANDS. Was that in your local area or further away] [RECORD CODE LOCAL AREA=1, FURTHER AFIELD=2, BOTH=3.] [IF QUERIED, LOCAL AREA IS WITHIN 100KM FROM WHERE YOU LIVE]
- 1.3 And how interested would you be in [READ OUT FIRST ACTIVITY] more often, on a scale of 0 to 10, where 0 is not at all interested and 10 is extremely interested? [RECORD RATING] [NOTE FOR INTERVIEWERS: *Where an activity category includes multiple types of pursuits, e.g. snow sports, record level of interest for the one they are most interested in doing more often.*]

[GO THROUGH Q1.1, Q1.2 AND Q1.3 FOR EACH ACTIVITY IN LIST.]

Activity [RANDOMISE ORDER. RETAIN ORDER FOR SUBSEQUENT SECTIONS.]	Q1.1 Frequency in last 12	Q1.2 Local area or further	Q1.3 Interest in doing more
---	---------------------------------	-------------------------------------	--------------------------------------



	months	away or both	often
HIGH INCIDENCE ACTIVITIES			
a. Bush or nature walking for less than two hours on trails, tracks or boardwalks			
b. Bushwalking or hiking for two hours or more, but not overnight			
c. Cycling or mountain biking on an unsealed road or track			
d. Cycling on roads or footpaths for recreation, not just to get to and from places [NOTE FOR INTERVIEWERS: <i>This includes cycling on roads, in dedicated cycle lanes and on footpaths where cycling is allowed</i>]			
e. Cycling on a sealed bike path or track [NOTE FOR INTERVIEWERS: <i>This includes any cycling on sealed paths or tracks away from roads and footpaths, e.g. in a park</i>]			
f. Water sports, including outdoor swimming, snorkelling, surfing, bodyboarding, wind surfing and kite surfing			
g. Picnicking, including outdoor social gatherings like weddings, family reunions, club fun days, etc.			
h. Car camping, that is, camping within easy walking distance of your car			
LOW INCIDENCE ACTIVITIES			
i. Bushwalking or hiking with overnight camping			
J. Walking on roads or footpaths for recreation, not just to get to and from places			
k. Running or jogging outdoors			
l. Snow sports, including skiing, snowboarding, tobogganing		only ask if Southern Tablelands	
m. Sports involving motorised watercraft, including motorboating, speedboating, jet skiing, water-skiing and wakeboarding			
n. Sports involving non-motorised watercraft, including sailing, canoeing, rowing, kayaking and rafting			

o. Scenic driving with a car or motorbike			
p. Four-wheel driving on unsealed roads or tracks			
q. Trail bike or quad bike riding			
r. Rock climbing, abseiling, caving or canyoning			
s. Visiting landmarks, lookouts and scenery			
t. Visiting Aboriginal and other cultural heritage sites			
u. Nature study, including bird or other wildlife watching, tree and flora appreciation, nature photography or painting/drawing			
v. Volunteer work for the environment, for example, bush regeneration			
w. Attending outdoor concerts/music festivals			
x. Fishing			
y. Horse riding			

1.4 [If 1 to 5 activities are given a rating of 5 or more at Q1.3, include all of these activities at this question, regardless of whether they are high or low incidence. If more than 5 activities are given a rating of 5 or more at Q1.3, observe the following selection criteria:

- o Where **1, 2 or 3 low** incidence activities and **more than 2 high** incidence activities are rated 5 or higher, include **all of the low** incidence activities, and **4, 3 or 2 activities randomly selected from the high** incidence activities (for a total of 5 activities),
- o Where **1 or 2 high** incidence activities and **more than 3 low** incidence activities are rated 5 or higher, include **all of the high** incidence activities and **4 or 3 randomly selected from the low** incidence activities (for a total of 5 activities),
- o Where **more than 3 low** incidence activities and **more than 2 high** incidence activities are rated 5 or higher, include **a random selection of 3 low and 2 high** incidence activities.
- o Where **0 low** incidence are rated 5 or higher, include **a random selection of 5 high incidence activities**

- o Where **0 high** incidence are rated 5 or higher, include **a random selection of 5 low incidence activities.**]

You said that you'd be interested in [READ OUT FIRST ACTIVITY] more often. What are some of the **things** stopping you from doing so? [RECORD VERBATIM. PROBE FOR DETAILED RESPONSES. IF RESPONSE IS VAGUE OR UNCLEAR, ASK: What do you mean by [RESPONSE]?] What else? [REPEAT FOR SUBSEQUENT ACTIVITIES.]

[NOTE FOR INTERVIEWERS: *The list below provides examples of the types of responses we are expecting to give you an idea of the level of detail required from responses.* **DO NOT CODE RESPONSES.**]

LACK OF TIME DUE TO WORK COMMITMENTS
LACK OF TIME DUE TO FAMILY COMMITMENTS
LACK OF TIME (NOT FURTHER SPECIFIED)
UNAWARE OF LOCAL OPPORTUNITIES TO DO ACTIVITY
LACK OF OPPORTUNITIES/FACILITIES TO DO IT IN LOCAL AREA
COST OF ENTRY FEE
COST OF CAR PARKING
AVAILABILITY OF CAR PARKING
COST OF GETTING THERE (PETROL OR PUBLIC TRANSPORT)
COST OF EQUIPMENT REQUIRED TO DO ACTIVITY
COST OF PARTICIPATING IN ACTIVITY (PER EPISODE/OCCASION)
NOT SUITABLE FOR CHILDREN/CAN'T TAKE CHILDREN ALONG
HAVE NO ONE TO DO THIS ACTIVITY WITH
THE WEATHER/BAD WEATHER/RAIN
HEALTH PROBLEMS
DON'T HAVE THE RIGHT EQUIPMENT
DON'T HAVE TRANSPORT/NO WAY TO GET THERE
NOT FIT ENOUGH TO DO THIS ACTIVITY
FEAR OF GETTING INJURED
FEAR OF WILDLIFE / GETTING BITTEN/STUNG ETC

FEAR OF BEING ISOLATED
FEAR FOR OWN SAFETY AMONG STRANGERS
TOO BUSY DOING OTHER RECREATIONAL ACTIVITIES
LOCATION IS TOO CROWDED
OPENING HOURS NOT CONVENIENT
LACK OF MOTIVATION

1.5 [If 1 to 5 activities are given a rating of 5 or more at Q1.3, or frequency greater than 0 at 1.1, include all of these activities at this question, regardless of whether they are high or low incidence. If more than 5 activities are given a rating of 5 or more at Q1.3, or frequency greater than 0 at 1.1,, observe the following selection criteria:

- o Where **1, 2 or 3 low** incidence activities and **more than 2 high** incidence activities are rated 5 or higher, include **all of the low** incidence activities, and **4, 3 or 2 activities randomly selected from the high** incidence activities (for a total of 5 activities),
- o Where **1 or 2 high** incidence activities and **more than 3 low** incidence activities are rated 5 or higher, include **all of the high** incidence activities and **4 or 3 randomly selected from the low** incidence activities (for a total of 5 activities),
- o Where **more than 3 low** incidence activities and **more than 2 high** incidence activities are rated 5 or higher, include **a random selection of 3 low and 2 high** incidence activities.
- o Where **0 low** incidence are rated 5 or higher, include **a random selection of 5 high incidence activities**
- o Where **0 high** incidence are rated 5 or higher, include **a random selection of 5 low incidence activities**.

WHERE POSSIBLE, GENERATE SELECTION THAT IS DIFFERENT FROM THAT USED AT Q1.4]

Now I'm going to ask you about some of the activities that you have done in the last 12 months, or that you would be interested in doing more often. For each activity, I'd like you to imagine that you were going to do it in a National Park, State Conservation Area,



State Forest or Nature Reserve in your region. I DON'T mean local council parks or botanical gardens.

I'd like you to tell me what would be the main features (either natural or man-made) that you would want if you were going to do the activity in one of these locations.

So, the first one is [READ OUT FIRST ACTIVITY]. What would be the natural or man-made main features you would want? [RECORD VERBATIM. PROBE FOR DETAILED RESPONSES. What do you mean by [RESPONSE]?] What other natural or man-made features would you want? [REPEAT FOR SUBSEQUENT ACTIVITIES.]

[NOTE FOR INTERVIEWERS: *The list below provides examples of the types of responses we are expecting to give you an idea of the level of detail required from responses. DO NOT CODE RESPONSES*]

TOILETS
SHOWERS
CHANGE ROOMS
PICNIC TABLES AND CHAIRS
BBQ'S AND OTHER FOOD PREPARATION AREAS
WATER / TAPS
CLEARED PATHS OR TRAILS THROUGH THE BUSH (UNSEALED)
SEALED PATHS OR BOARDWALKS
HAND RAILS
SHOPS OR KIOSKS
CAFES OR RESTAURANTS
CHILDREN'S PLAYGROUNDS OR PLAY AREAS
SIGNAGE
VISITORS' CENTRE
INFORMATION BOARDS
GUIDED TOURS
BROCHURES OR MAPS
RANGER / MANAGEMENT PRESENCE

CAMPSITES
POWERED CAMPSITES
CABINS
OTHER ACCOMMODATION (E.G. HOSTELS, MOTELS, ETC)
ISOLATION / INFREQUENT TO NO CONTACT WITH OTHER PEOPLE
NOT TOO CROWDED
OTHER PEOPLE PRESENT (FELLOW RECREATIONISTS)
SWIMMING AREAS
GOOD ROAD CONDITIONS
PARKING
PUBLIC TRANSPORT
LOOKOUTS
SCENERY/ VIEWS (E.G. WATERFALLS)
ABORIGINAL HERITAGE SITES
HISTORIC HERITAGE SITES
FLORA/NATIVE TREES, PLANTS AND FLOWERS
FAUNA/NATIVE ANIMALS
NO EVIDENCE OF HUMAN INTERFERENCE IN LANDSCAPE / COMPLETELY UNSPOILT SURROUNDINGS
LEAFY BACKGROUND
TREES
GARBAGE BINS
PICNIC SHELTERS
SHADE
MOBILE PHONE COVERAGE
ACCESS TO EMERGENCY SERVICES

2 Motivations

- 2.1 Now I'm going to read out some statements. Using a scale of 0 to 10, I'd like you to tell me how much each statement describes you, where 0 is not at all and 10 is very much.
[RANDOMISE ORDER.]

a. I seek isolation and escape in the outdoors.
b. I enjoy getting outdoors to spend time with my family or friends.
c. I'm willing to travel a bit further to find more untouched places for outdoor activities.
d. I find the opportunities for adventure and challenge in the outdoors appealing.
e. I'm interested in learning about the history or cultural heritage of places I visit in the outdoors.
f. I enjoy learning about the animals and plants of places I visit in the outdoors.
g. I like to spend time outdoors to get a break from my day-to-day routine.
h. I like to get outdoors for the health benefits, like breathing the fresh air.
i. I like to get outdoors for the peace and quiet.
j. I prefer to exercise in the outdoors rather than inside.

3 Demographics

Thanks for that. We're almost finished. Just a few final questions, to make sure we've spoken to a good cross-section of people.

- 3.1 What is the highest level of education that you have attained? [SINGLE RESPONSE. DO NOT READ OUT, BUT PROMPT AS NECESSARY.]

No formal schooling	1
Primary school	2
Junior high school (Years 7-10)	3
Senior high school (Years 11-12)	4
TAFE/Technical college	5
University	6
Something else [RECORD VERBATIM]	7

REFUSED	98
CAN'T SAY / DON'T KNOW	99

3.2 Which of the following best describes your household? [READ OUT]

A solo household (just you)	1
A couple	2
A family group	3
A shared household	4
Or something else? [RECORD VERBATIM]	5
REFUSED	98

3.3 [IF Q3.2=3, 4, 5] How many children younger than 18 years live in your household?
[RECORD NUMBER. CODE '98' IF REFUSED]

3.4 [IF Q3.3>0] And of these children, how many are aged ... [READ OUT AGE GROUPS.
RECORD NUMBERS UNTIL TOTAL=Q3.3.]

0-2	[RECORD NUMBER]
3-5	[RECORD NUMBER]
6-12	[RECORD NUMBER]
13-15	[RECORD NUMBER]
16-17	[RECORD NUMBER]

3.5 In what countries were your mother and father born? [RECORD CODES]

	Mother	Father
Australia	1	1
United Kingdom	2	2
New Zealand	3	3
Italy	4	4
China	5	5



Vietnam	6	6
India	7	7
Philippines	8	8
Greece	9	9
South Africa	10	10
Germany	11	11
Malaysia	12	12
Netherlands	13	13
Lebanon	14	14
Hong Kong	15	15
Other [RECORD VERBATIM]	16	16
REFUSED	98	98
CAN'T SAY / DON'T KNOW	99	99

4 Closing

That's the end of our survey. Thanks for helping us out. We are conducting this survey on behalf of NSW National Parks. The findings will be used to help decide what sorts of outdoor activities and facilities to provide, so that they are in line with what people want.

B

APPENDIX B: POSTCODE DEFINING REGIONS

Greater Sydney

2000	2044	2090	2131	2170	2219	2569	2784
2006	2045	2092	2132	2171	2220	2570	2785
2007	2046	2093	2133	2172	2221	2571	2786
2008	2047	2094	2134	2173	2222	2572	2845
2009	2048	2095	2135	2174	2223	2745	
2010	2049	2096	2136	2175	2224	2747	
2011	2050	2097	2137	2176	2225	2748	
2015	2060	2099	2138	2177	2226	2749	
2016	2061	2100	2140	2178	2227	2750	
2017	2062	2101	2141	2179	2228	2752	
2018	2063	2102	2142	2190	2229	2753	
2019	2064	2103	2143	2191	2230	2754	
2020	2065	2104	2144	2192	2231	2755	
2021	2066	2105	2145	2193	2232	2756	
2022	2067	2106	2146	2194	2233	2757	
2023	2068	2107	2147	2195	2234	2758	
2024	2069	2108	2148	2196	2250	2759	
2025	2070	2109	2150	2197	2251	2760	
2026	2071	2110	2151	2198	2256	2761	
2027	2072	2111	2152	2199	2257	2762	
2028	2073	2112	2153	2200	2258	2763	
2029	2074	2113	2154	2203	2260	2765	
2030	2075	2114	2155	2204	2261	2766	
2031	2076	2115	2156	2205	2508	2767	
2032	2077	2116	2157	2206	2555	2768	
2033	2079	2117	2158	2207	2556	2770	
2034	2080	2118	2159	2208	2557	2773	
2035	2081	2119	2160	2209	2558	2775	
2036	2082	2120	2161	2210	2559	2775	
2037	2083	2121	2162	2211	2560	2776	
2038	2084	2122	2163	2212	2563	2777	
2039	2085	2125	2164	2213	2564	2778	
2040	2086	2126	2165	2214	2565	2779	
2041	2087	2127	2166	2216	2566	2780	
2042	2088	2128	2167	2217	2567	2782	
2043	2089	2130	2168	2218	2568	2783	

North Coast

2259	2294	2320	2428	2460	2485
2262	2295	2321	2429	2462	2486
2263	2296	2322	2430	2463	2487
2264	2297	2323	2431	2464	2488
2265	2298	2324	2439	2465	2489
2267	2299	2325	2440	2466	2490
2278	2300	2326	2441	2469	2898
2280	2302	2327	2443	2470	
2281	2303	2330	2444	2471	
2282	2304	2331	2445	2472	
2283	2305	2334	2446	2473	
2284	2306	2335	2447	2474	
2285	2307	2415	2448	2477	
2286	2311	2420	2449	2478	
2287	2312	2421	2450	2479	
2289	2315	2422	2452	2480	
2290	2316	2423	2453	2481	
2291	2317	2424	2454	2482	
2292	2318	2425	2455	2483	
2293	2319	2426	2456	2484	

Northern Tablelands

2328	2341	2352	2361	2382	2403	2475
2329	2342	2353	2365	2388	2404	2476
2333	2343	2354	2369	2390	2405	
2336	2344	2355	2370	2397	2406	
2337	2345	2356	2371	2399	2408	
2338	2346	2358	2372	2400	2409	
2339	2347	2359	2380	2401	2410	
2340	2350	2360	2381	2402	2411	

South Coast

2500	2517	2528	2536	2545	2573
2502	2518	2529	2537	2546	2574
2505	2519	2530	2538	2548	2575
2506	2525	2533	2539	2549	2576
2515	2526	2534	2540	2550	2577
2516	2527	2535	2541	2551	2578



Southern Tablelands

2579	2603	2622	2643	2665	2794
2580	2604	2623	2644	2666	2803
2581	2605	2624	2645	2668	2807
2582	2606	2625	2646	2700	2808
2583	2607	2626	2647	2701	2900
2584	2609	2627	2649	2702	2902
2585	2611	2628	2650	2703	2903
2586	2612	2629	2652	2720	2904
2587	2614	2630	2653	2722	2905
2588	2615	2631	2655	2725	2906
2590	2617	2632	2656	2726	2911
2594	2618	2633	2658	2727	2912
2600	2619	2640	2659	2729	2913
2601	2620	2641	2660	2730	2914
2602	2621	2642	2663	2793	

Western NSW

2357	2707	2736	2806	2834	2865	3644
2379	2710	2737	2809	2835	2866	
2386	2711	2738	2810	2836	2867	
2387	2712	2739	2820	2839	2868	
2395	2713	2787	2821	2840	2869	
2396	2714	2790	2823	2842	2870	
2648	2715	2791	2824	2843	2871	
2669	2716	2792	2825	2844	2873	
2671	2717	2795	2827	2846	2874	
2672	2721	2797	2828	2847	2875	
2675	2731	2798	2829	2848	2876	
2680	2732	2799	2830	2849	2877	
2681	2733	2800	2831	2850	2878	
2705	2734	2804	2832	2852	2879	
2706	2735	2805	2833	2864	2880	

C

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PARTICIPATION

Table 1. Participation rates for outdoor recreation activities by age and gender

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Picnicking	89%	89%	84%	74%	91%	91%	88%	85%	84%
Visiting landmarks, lookouts and scenery	78%	74%	70%	74%	73%	68%	74%	75%	73%
Walking on roads or footpaths for recreation	56%	61%	65%	62%	82%	87%	76%	82%	72%
Scenic driving with a car or motorbike	67%	76%	86%	71%	82%	66%	65%	71%	72%
Bushwalking for <2 hrs	67%	63%	49%	46%	64%	64%	53%	55%	54%
Water sports	83%	68%	51%	39%	64%	53%	71%	48%	52%
Fishing	72%	66%	70%	42%	55%	34%	38%	30%	44%
Nature study	22%	37%	32%	42%	27%	36%	53%	54%	43%
Car camping	67%	47%	65%	32%	73%	45%	41%	28%	40%
Four-wheel driving	61%	55%	59%	34%	36%	36%	29%	32%	39%
Bushwalking for 2+ hrs, but not overnight	56%	42%	51%	35%	55%	38%	41%	31%	38%
Attending outdoor concerts/music festivals	50%	32%	41%	34%	73%	38%	41%	36%	38%
Visiting Aboriginal & other cultural heritage sites	22%	21%	32%	24%	18%	38%	35%	35%	30%
Running or jogging outdoors	67%	61%	43%	19%	55%	45%	32%	10%	30%
Trail bike or quad bike riding	78%	39%	43%	16%	18%	13%	24%	13%	23%
Sports involving motorised watercraft	61%	45%	27%	14%	45%	13%	38%	12%	23%
Cycling on roads or footpaths for recreation	44%	29%	32%	18%	45%	34%	32%	4%	22%
Sports involving non-motorised watercraft	28%	29%	14%	21%	18%	21%	24%	10%	18%
Cycling on a sealed bike path or track	33%	39%	19%	13%	27%	26%	32%	4%	18%
Volunteer work for the environment	17%	8%	8%	23%	9%	17%	15%	19%	17%
Hiking with overnight camping	22%	21%	30%	15%	64%	9%	15%	10%	16%
Horse riding	28%	16%	22%	11%	36%	17%	24%	11%	15%
Mountain biking	28%	24%	14%	9%	18%	11%	12%	4%	11%
Rock climbing, abseiling, caving or canyoning	22%	11%	16%	6%	18%	9%	12%	4%	9%
Snow sports	11%	8%	3%	0%	0%	2%	9%	3%	3%

Table 2. Frequency of participation in outdoor recreation activities by age and gender (participants only)

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Walking on roads or footpaths for recreation	97	61	63	126	63	78	99	126	103
Trail bike or quad bike riding	115	60	80	174	53	37	118	99	102
Horse riding	172	172	140	78	18	85	17	114	99
Nature study	46	8	79	103	17	15	53	74	67
Running or jogging outdoors	55	56	61	74	15	49	46	46	54
Cycling on a sealed bike path or track	10	61	65	52	5	11	34	97	43
Cycling on roads or footpaths for recreation	4	61	80	46	12	10	40	82	42
Four-wheel driving	33	11	61	42	10	10	59	30	34
Volunteer work for the environment	3	5	3	35	3	7	40	42	29
Water sports	30	39	16	16	7	17	35	27	25
Mountain biking	2	50	19	36	25	7	2	19	24
Bushwalking for <2 hrs	12	10	31	30	7	6	19	22	20
Scenic driving with a car or motorbike	16	17	17	16	12	15	20	13	15
Fishing	30	16	21	18	6	6	11	8	15
Picnicking	7	11	12	9	10	12	13	10	10
Bushwalking for 2+ hrs, but not overnight	15	8	18	11	7	3	8	9	10
Visiting landmarks, lookouts and scenery	5	7	15	8	8	11	9	10	9
Sports involving motorised watercraft	12	6	21	10	4	8	6	7	9
Sports involving non-motorised watercraft	8	10	38	5	8	3	5	3	8
Rock climbing, abseiling, caving or canyoning	7	5	12	11	2	2	3	6	7
Hiking with overnight camping	6	6	9	5	7	7	2	6	6
Car camping	10	6	6	5	4	6	3	7	6
Visiting Aboriginal & other cultural heritage sites	8	3	11	4	4	5	6	4	5
Snow sports	4	2	3	0	0	1	10	1	4
Attending outdoor concerts/music festivals	3	2	3	2	4	3	3	3	3

Table 3. Frequency of participation in outdoor recreation activities by age and gender (participants and non-participants)

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Walking on roads or footpaths for recreation	54	37	41	77	51	68	75	104	75
Nature study	10	3	26	44	5	5	28	40	29
Trail bike or quad bike riding	89	24	35	28	10	5	28	13	24
Running or jogging outdoors	37	34	26	14	8	22	15	4	16
Horse riding	48	27	30	8	6	14	4	12	15
Four-wheel driving	20	6	36	14	3	4	17	10	13
Water sports	25	27	8	6	4	9	25	13	13
Scenic driving with a car or motorbike	11	13	15	11	10	10	13	9	11
Bushwalking for <2 hrs	8	6	15	14	5	4	10	12	11
Cycling on roads or footpaths for recreation	2	18	26	8	5	3	13	4	9
Picnicking	6	10	10	6	9	11	12	9	9
Cycling on a sealed bike path or track	3	24	12	7	1	3	11	4	8
Visiting landmarks, lookouts and scenery	4	5	10	6	5	7	7	7	7
Fishing	22	11	15	8	3	2	4	2	7
Volunteer work for the environment	0	0	0	8	0	1	6	8	5
Bushwalking for 2+ hrs, but not overnight	8	4	9	4	4	1	3	3	4
Mountain biking	0	12	3	3	5	1	0	1	3
Car camping	7	3	4	2	3	3	1	2	2
Sports involving motorised watercraft	7	3	6	1	2	1	2	1	2
Visiting Aboriginal & other cultural heritage sites	2	1	4	1	1	2	2	1	2
Sports involving non-motorised watercraft	2	3	5	1	1	1	1	0	1
Attending outdoor concerts/music festivals	1	1	1	1	3	1	1	1	1
Hiking with overnight camping	1	1	3	1	4	1	0	1	1
Rock climbing, abseiling, caving or canyoning	2	1	2	1	0	0	0	0	1
Snow sports	0	0	0	0	0	0	1	0	0

Table 4. Total participation in outdoor recreation activities in the last 12 months (in millions)*

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Walking on roads or footpaths for recreation	0.5	0.5	0.6	3.1	0.5	0.9	1.2	4.2	11.6
Nature study	0.1	0.0	0.4	1.8	0.0	0.1	0.4	1.6	4.5
Trail bike or quad bike riding	0.9	0.3	0.5	1.2	0.1	0.1	0.4	0.5	4.0
Running or jogging outdoors	0.4	0.4	0.4	0.6	0.1	0.3	0.2	0.2	2.5
Horse riding	0.5	0.3	0.5	0.3	0.1	0.2	0.1	0.5	2.4
Four-wheel driving	0.2	0.1	0.5	0.6	0.0	0.0	0.3	0.4	2.1
Water sports	0.2	0.3	0.1	0.3	0.0	0.1	0.4	0.5	2.0
Scenic driving with a car or motorbike	0.1	0.2	0.2	0.5	0.1	0.1	0.2	0.4	1.8
Bushwalking for <2 hrs	0.1	0.1	0.2	0.6	0.0	0.0	0.2	0.5	1.7
Cycling on roads or footpaths for recreation	0.0	0.2	0.4	0.3	0.1	0.0	0.2	0.1	1.4
Picnicking	0.1	0.1	0.2	0.3	0.1	0.1	0.2	0.3	1.4
Cycling on a sealed bike path or track	0.0	0.3	0.2	0.3	0.0	0.0	0.2	0.2	1.2
Fishing	0.2	0.1	0.2	0.3	0.0	0.0	0.1	0.1	1.1
Visiting landmarks, lookouts and scenery	0.0	0.1	0.2	0.2	0.1	0.1	0.1	0.3	1.1
Volunteer work for the environment	0.0	0.0	0.0	0.3	0.0	0.0	0.1	0.3	0.8
Bushwalking for 2+ hrs, but not overnight	0.1	0.0	0.1	0.2	0.0	0.0	0.1	0.1	0.6
Mountain biking	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.4
Car camping	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.1	0.4
Sports involving motorised watercraft	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.3
Visiting Aboriginal & other cultural heritage sites	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.2
Sports involving non-motorised watercraft	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.2
Attending outdoor concerts/music festivals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Hiking with overnight camping	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Rock climbing, abseiling, caving or canyoning	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Snow sports	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

* No significance testing done for this table

INTEREST

Table 5. Interest in more frequent participation in outdoor recreation activities by age and gender

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Picnicking	6.0	7.5	6.3	5.3	7.2	7.3	7.6	6.6	6.5
Visiting landmarks, lookouts and scenery	5.4	5.7	5.7	6.1	6.0	6.4	6.4	6.1	6.1
Walking on roads or footpaths for recreation	3.4	5.0	4.8	4.7	5.7	7.7	6.6	6.3	5.7
Scenic driving with a car or motorbike	4.9	6.6	6.9	5.4	6.0	5.8	5.7	6.3	6.0
Water sports	6.2	6.9	4.8	3.9	6.8	5.4	6.3	4.4	5.0
Bushwalking for <2 hrs	5.1	5.4	4.6	4.4	5.1	5.7	5.0	5.0	4.9
Attending outdoor concerts/music festivals	6.9	6.6	4.2	4.5	6.4	6.8	6.0	5.1	5.4
Bushwalking for 2+ hrs, but not overnight	4.8	5.1	5.0	3.8	5.1	3.9	4.6	3.8	4.2
Visiting Aboriginal & other cultural heritage sites	3.7	3.4	4.1	3.7	4.6	5.4	4.6	4.2	4.1
Car camping	5.4	5.8	6.0	3.6	5.2	5.1	4.5	3.3	4.3
Sports involving non-motorised watercraft	4.6	5.3	3.9	3.0	4.6	4.0	3.8	1.9	3.3
Fishing	5.4	7.1	6.5	4.8	4.5	3.6	4.0	3.5	4.6
Nature study	2.4	3.7	3.8	3.9	3.7	4.5	4.0	4.9	4.2
Volunteer work for the environment	3.9	3.7	3.4	3.2	5.3	4.5	4.0	3.9	3.8
Cycling on a sealed bike path or track	2.9	4.6	3.8	2.1	3.6	4.0	4.4	1.8	2.9
Cycling on roads or footpaths for recreation	2.9	4.2	3.8	2.2	4.0	4.5	3.8	1.7	2.9
Hiking with overnight camping	4.4	5.2	4.2	2.5	4.5	3.4	3.1	2.3	3.2
Snow sports	6.7	5.9	3.0	1.2	4.6	4.5	3.8	1.5	2.8
Sports involving motorised watercraft	6.4	6.1	4.3	2.0	5.5	4.1	4.5	1.6	3.2
Running or jogging outdoors	4.8	4.3	3.2	2.2	3.6	4.2	3.2	1.0	2.6
Four-wheel driving	4.6	5.5	5.6	3.1	4.1	4.2	2.5	2.9	3.7
Mountain biking	3.7	3.8	2.8	1.2	3.2	2.6	1.8	0.9	1.9
Rock climbing, abseiling, caving or canyoning	4.6	4.7	3.9	1.5	4.2	3.0	2.6	1.4	2.5
Trail bike or quad bike riding	5.9	5.3	4.7	1.6	4.0	2.8	2.6	1.2	2.6
Horse riding	3.5	3.8	3.1	2.0	6.2	4.0	3.5	2.2	2.9

BARRIERS AND PREFERENCES

Table 6. Barriers to more frequent participation in outdoor recreation averaged over activities

Barriers	%
Lack of time	82.8%
Lack of local opportunities	52.3%
Cost of participating	25.3%
Don't have the right equipment	22.2%
Don't have transport/no way to get there/accessibility	18.4%
Have no one (including pets) to do this activity with	18.2%
Bad weather (including rain or drought)	17.4%
Fatigue/lack of motivation	15.9%
Health problems	14.6%
Transport costs (including petrol or public transport)	12.4%
Unaware of local opportunities to do activity	8.8%
Not suitable for children/can't take children along	7.8%
Lack of occasions/invitations presenting (external)	6.8%
Not fit enough to do this activity	6.1%
Too busy doing other recreational activities	5.6%
Age/getting old	3.5%
Fear of getting injured	3.3%
Need to organise	3.3%
Cost of equipment required to do activity	3.0%
Lack of variety/bored with local opportunities	2.8%
Poor quality/maintenance of roads/paths; no suitable walking paths	2.5%
No music i like on offer	2.3%
Traffic	1.8%
No licence	1.8%
Only do this when travelling	1.3%
No experience/skilled	1.3%
Restrictions on activity	1.0%
Fear of wildlife / getting bitten/stung etc	0.8%
Safety concerns	0.8%
Pollution	0.8%
Fear for own safety among strangers	0.5%
Location is too crowded	0.5%
No amenities	0.5%
Difficulty using/carrying equipment	0.5%
Environmental concern	0.5%
Fear of being isolated	0.3%
Seasonal/prefer warmer weather	0.3%
Cannot take pets along	0.3%
No lighting/dark when i want	0.3%
Accommodation	0.3%
Need shade	0.3%

Table 7. Preferences for participation in outdoor recreation averaged over activities

Preference	%
No additional facilities	50.6%
Toilets	46.4%
Scenery/ views (eg waterfalls)	38.7%
Cleared paths or trails through the bush (unsealed)	35.7%
Good road conditions/accessibility	29.4%
Rest areas/seats/picnic tables	27.2%
BBQs and other food preparation areas	24.2%
Completely unspoilt surroundings	21.2%
Water / taps	20.7%
Fauna/native animals	20.0%
Clean, well maintained environment	20.0%
Sealed paths or boardwalks	19.2%
Signage	16.7%
Safety (general)	16.5%
Amenities / facilities (not further specified)	13.5%
Shelters	13.2%
Trees	12.7%
Information boards	12.5%
Flora/native trees, plants and flowers	12.2%
Brochures or maps/online info/promotion	11.0%
Swimming areas	10.5%
Flat/cleared ground (wheelchair friendly) smooth water	9.7%
Historic heritage sites	8.5%
Boat ramp / boat access	8.2%
Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	8.2%
Lookouts	7.5%
Equipment hire / access to equipment	7.5%
Showers	7.2%
Garbage bins	7.2%
Shops or kiosks	7.0%
Shade	6.5%
Children playgrounds or play areas	6.2%
Campsites	6.0%
Parking	5.7%
Other	5.2%
Cafes or restaurants	5.0%
Isolation / infrequent to no contact with other people	4.5%
Aboriginal heritage sites	4.5%
Separate wide paths away from traffic/cycles	4.2%
Leafy background	4.0%
Jetty	3.5%
Beach/sandy areas	3.5%
Not too crowded	3.2%
Access to emergency services	3.2%
Ranger / management presence	2.7%
Other accommodation (eg hostels, motels, etc)	2.7%
Instructors / coaches / training	2.7%
Hand rails/fence	2.5%
Other people present (fellow recreationists)	2.2%
Ease restrictions	2.2%
Garden	2.0%
Change rooms	1.7%
Lighting	1.7%
Guided tours/audioguides	1.2%
Mobile phone coverage	1.2%
Public transport	1.0%
Ski lifts	1.0%
Fish cleaning areas	1.0%
Visitors' centre	0.7%
More restrictions	0.5%
Events	0.5%

Preference	%
Cabins	0.2%
Fuel	0.2%
Firewood	0.2%



Table 8. Barriers and preferences - Attending outdoor concerts and music festivals

Barriers	%	Preferences	%
Lack of local opportunities	59%	Toilets	27%
Lack of time	33%	No additional facilities	22%
Cost of participating	15%	Rest areas/seats/picnic tables	14%
No music i like on offer	9%	Shops or kiosks	13%
Transport costs (including petrol or public transport)	8%	Other	10%
Unaware of local opportunities to do activity	6%	Scenery/ views (eg waterfalls)	7%
Have no one (including pets) to do this activity with	4%	Cafes or restaurants	7%
Don't have transport/no way to get there/accessibility	4%	Amenities / facilities (not further specified)	6%
Not suitable for children/can't take children along	3%	Shade	5%
Bad weather (including rain or drought)	3%	Clean, well maintained environment	5%
Health problems	3%	Shelters	5%
Too busy doing other recreational activities	1%	Parking	5%
Location is too crowded	1%	Garbage bins	4%
Age/getting old	1%	Good road conditions/accessibility	4%
Accommodation	1%	Flat/cleared ground (wheelchair friendly) smooth water	3%
		Lighting	3%
		Trees	3%
		Other accommodation (eg hostels, motels, etc)	3%
		Water / taps	3%
		Events	2%
		Garden	2%
		Safety (general)	2%
		Campsites	2%
		Ranger / management presence	2%
		Ease restrictions	1%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	1%
		Equipment hire / access to equipment	1%
		Fauna/native animals	1%
		Lookouts	1%
		Public transport	1%
		Other people present (fellow recreationists)	1%
		Brochures or maps/online info/promotion	1%
		BBQs and other food preparation areas	1%

Table 9. Barriers and preferences - Bushwalking for less than two hours

Barriers	%	Preferences	%
Lack of time	54%	Cleared paths or trails through the bush (unsealed)	29%
Lack of local opportunities	17%	Scenery/ views (eg waterfalls)	23%
Health problems	11%	Toilets	15%
Fatigue/lack of motivation	7%	Signage	13%
Not suitable for children/can't take children along	4%	No additional facilities	13%
Have no one (including pets) to do this activity with	4%	Fauna/native animals	13%
Bad weather (including rain or drought)	4%	Completely unspoilt surroundings	10%
Don't have transport/no way to get there/accessibility	4%	Rest areas/seats/picnic tables	10%
Age/getting old	4%	Water / taps	9%
Cost of participating	3%	Flora/native trees, plants and flowers	7%
Not fit enough to do this activity	3%	Information boards	6%
Need to organise	3%	Brochures or maps/online info/promotion	4%
Lack of variety/bored with local opportunities	2%	Sealed paths or boardwalks	4%
Unaware of local opportunities to do activity	1%	Good road conditions/accessibility	3%
Transport costs (including petrol or public transport)	1%	Safety (general)	3%
Fear of getting injured	1%	Historic heritage sites	3%
Fear of wildlife / getting bitten/stung etc	1%	Clean, well maintained environment	2%
Fear of being isolated	1%	Access to emergency services	2%
Safety concerns	1%	Shelters	2%
Poor quality/maintenance of roads/paths; no suitable walking paths	1%	Trees	2%
No lighting/dark when i want	1%	Lookouts	2%
		Not too crowded	2%
		Children playgrounds or play areas	2%
		BBQs and other food preparation areas	2%
		Flat/cleared ground (wheelchair friendly) smooth water	1%
		Amenities / facilities (not further specified)	1%
		Garbage bins	1%
		Parking	1%
		Visitors' centre	1%
		Hand rails/fence	1%

Table 10. Barriers and preferences - Bushwalking for more than two hours, but not overnight

Barriers	%	Preferences	%
Lack of time	68%	Scenery/ views (eg waterfalls)	18%
Lack of local opportunities	9%	Cleared paths or trails through the bush (unsealed)	16%
Health problems	9%	No additional facilities	15%
Have no one (including pets) to do this activity with	8%	Rest areas/seats/picnic tables	15%
Cost of participating	6%	Toilets	14%
Not fit enough to do this activity	5%	Signage	13%
Don't have transport/no way to get there/accessibility	4%	Fauna/native animals	11%
Bad weather (including rain or drought)	3%	Completely unspoilt surroundings	10%
Fatigue/lack of motivation	3%	Flora/native trees, plants and flowers	9%
Difficulty using/carrying equipment	3%	Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	8%
Not suitable for children/can't take children along	1%	Good road conditions/accessibility	8%
Too busy doing other recreational activities	1%	Brochures or maps/online info/promotion	8%
Age/getting old	1%	Water / taps	7%
Lack of variety/bored with local opportunities	1%	Trees	5%
Only do this when travelling	1%	Information boards	4%
Need to organise	1%	Shelters	3%
		Parking	3%
		Hand rails/fence	3%
		Sealed paths or boardwalks	3%
		Instructors / coaches / training	2%
		Safety (general)	2%
		Shade	2%
		Isolation / infrequent to no contact with other people	2%
		Campsites	2%
		Guided tours/audioguides	2%
		Shops or kiosks	2%
		Amenities / facilities (not further specified)	1%
		Mobile phone coverage	1%
		Garbage bins	1%
		Leafy background	1%
		Historic heritage sites	1%
		Swimming areas	1%
		Not too crowded	1%
		Ranger / management presence	1%
		Visitors' centre	1%
		Children playgrounds or play areas	1%
		Showers	1%

Table 11. Barriers and preferences - Car camping

Barriers	%	Preferences	%
Lack of time	75%	Toilets	40%
Cost of participating	10%	BBQs and other food preparation areas	20%
Have no one (including pets) to do this activity with	7%	Amenities / facilities (not further specified)	19%
Don't have the right equipment	7%	Water / taps	15%
Transport costs (including petrol or public transport)	4%	Good road conditions/accessibility	11%
Not suitable for children/can't take children along	4%	Showers	11%
Fatigue/lack of motivation	3%	Campsites	9%
Unaware of local opportunities to do activity	2%	Cleared paths or trails through the bush (unsealed)	9%
Lack of local opportunities	2%	No additional facilities	8%
Bad weather (including rain or drought)	2%	Trees	8%
Don't have transport/no way to get there/accessibility	2%	Leafy background	8%
Health problems	1%	Scenery/ views (eg waterfalls)	8%
Fear of wildlife / getting bitten/stung etc	1%	Beach/sandy areas	6%
Too busy doing other recreational activities	1%	Clean, well maintained environment	6%
Age/getting old	1%	Safety (general)	5%
Lack of occasions/invitations presenting (external)	1%	Shelters	5%
		Garbage bins	5%
		Fauna/native animals	5%
		Swimming areas	5%
		Isolation / infrequent to no contact with other people	5%
		Information boards	4%
		Rest areas/seats/picnic tables	4%
		Flat/cleared ground (wheelchair friendly) smooth water	3%
		Shade	3%
		Completely unspoilt surroundings	3%
		Historic heritage sites	3%
		Signage	3%
		Children playgrounds or play areas	3%
		Other	1%
		Lighting	1%
		Equipment hire / access to equipment	1%
		Access to emergency services	1%
		Flora/native trees, plants and flowers	1%
		Lookouts	1%
		Parking	1%
		Not too crowded	1%
		Powered campsites	1%
		Shops or kiosks	1%
		Hand rails/fence	1%

Table 12. Barriers and preferences - Cycling on a sealed bike path or track

Barriers	%	Preferences	%
Lack of time	32%	Sealed paths or boardwalks	34%
Lack of local opportunities	30%	Cleared paths or trails through the bush (unsealed)	19%
Health problems	15%	Scenery/ views (eg waterfalls)	17%
Don't have the right equipment	13%	Flat/cleared ground (wheelchair friendly) smooth water	10%
Bad weather (including rain or drought)	6%	No additional facilities	9%
Too busy doing other recreational activities	6%	Trees	7%
Fatigue/lack of motivation	6%	Flora/native trees, plants and flowers	7%
Cost of equipment required to do activity	4%	Good road conditions/accessibility	7%
Not suitable for children/can't take children along	4%	Signage	7%
Fear of getting injured	4%	Toilets	7%
Cost of participating	2%	Separate wide paths away from traffic/cycles	5%
Don't have transport/no way to get there/accessibility	2%	Equipment hire / access to equipment	5%
Traffic	2%	Safety (general)	5%
No experience/skilled	2%	Water / taps	5%
		Rest areas/seats/picnic tables	5%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	3%
		Clean, well maintained environment	3%
		Not too crowded	3%
		Children playgrounds or play areas	3%
		Lighting	2%
		Garden	2%
		Completely unspoilt surroundings	2%
		Brochures or maps/online info/promotion	2%
		Cafes or restaurants	2%

Table 13. Barriers and preferences - Cycling on roads or footpaths for recreation

Barriers	%	Preferences	%
Lack of time	52%	Sealed paths or boardwalks	48%
Lack of local opportunities	20%	Cleared paths or trails through the bush (unsealed)	30%
Don't have the right equipment	20%	Good road conditions/accessibility	23%
Health problems	13%	Separate wide paths away from traffic/cycles	18%
Bad weather (including rain or drought)	7%	Scenery/ views (eg waterfalls)	10%
Fatigue/lack of motivation	7%	No additional facilities	8%
Cost of equipment required to do activity	4%	Safety (general)	8%
Not suitable for children/can't take children along	4%	Toilets	8%
Not fit enough to do this activity	4%	Completely unspoilt surroundings	5%
Fear of getting injured	4%	Fauna/native animals	5%
Too busy doing other recreational activities	4%	Flora/native trees, plants and flowers	5%
Traffic	4%	Signage	5%
Have no one (including pets) to do this activity with	2%	Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	3%
No experience/skilled	2%	Amenities / facilities (not further specified)	3%
		Clean, well maintained environment	3%
		Access to emergency services	3%
		Mobile phone coverage	3%
		Aboriginal heritage sites	3%
		Public transport	3%
		Other people present (fellow recreationists)	3%
		Water / taps	3%

Table 14. Barriers and preferences - Fishing

Barriers	%	Preferences	%
Lack of time	67%	No additional facilities	26%
Lack of local opportunities	22%	Fauna/native animals	18%
Don't have transport/no way to get there/accessibility	8%	Water / taps	12%
Cost of participating	6%	Boat ramp / boat access	9%
Don't have the right equipment	6%	Completely unspoilt surroundings	8%
Transport costs (including petrol or public transport)	5%	Clean, well maintained environment	7%
Have no one (including pets) to do this activity with	5%	Jetty	7%
Bad weather (including rain or drought)	5%	Scenery/ views (eg waterfalls)	7%
Health problems	4%	Good road conditions/accessibility	6%
No licence	4%	Toilets	6%
Need to organise	3%	Garbage bins	5%
Unaware of local opportunities to do activity	1%	Rest areas/seats/picnic tables	5%
Not suitable for children/can't take children along	1%	Equipment hire / access to equipment	4%
Fear of getting injured	1%	Isolation / infrequent to no contact with other people	4%
Too busy doing other recreational activities	1%	Fish cleaning areas	3%
No experience/skilled	1%	Brochures or maps/online info/promotion	3%
Pollution	1%	Information boards	3%
Restrictions on activity	1%	BBQs and other food preparation areas	3%
		Other	2%
		Flat/cleared ground (wheelchair friendly) smooth water	2%
		Amenities / facilities (not further specified)	2%
		Shade	2%
		Shelters	2%
		Trees	2%
		Campsites	2%
		Cleared paths or trails through the bush (unsealed)	2%
		Ease restrictions	1%
		Historic heritage sites	1%
		Parking	1%
		Ranger / management presence	1%
		Signage	1%
		Shops or kiosks	1%
		Hand rails/fence	1%
		Showers	1%

Table 15. Barriers and preferences - Four-wheel driving

Barriers	%	Preferences	%
Lack of time	56%	No additional facilities	22%
Don't have the right equipment	29%	Scenery/ views (eg waterfalls)	14%
Cost of participating	11%	Completely unspoilt surroundings	13%
Fatigue/lack of motivation	6%	Good road conditions/accessibility	13%
Transport costs (including petrol or public transport)	5%	Signage	12%
Have no one (including pets) to do this activity with	5%	Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	9%
Restrictions on activity	5%	Brochures or maps/online info/promotion	8%
Lack of local opportunities	3%	Clean, well maintained environment	6%
Not suitable for children/can't take children along	3%	Toilets	5%
Bad weather (including rain or drought)	3%	Campsites	4%
Health problems	3%	Cleared paths or trails through the bush (unsealed)	4%
Don't have transport/no way to get there/accessibility	2%	Separate wide paths away from traffic/cycles	3%
Not fit enough to do this activity	2%	Equipment hire / access to equipment	3%
Fear for own safety among strangers	2%	Access to emergency services	3%
Too busy doing other recreational activities	2%	Mobile phone coverage	3%
Environmental concern	2%	Historic heritage sites	3%
		Lookouts	3%
		Isolation / infrequent to no contact with other people	3%
		Sealed paths or boardwalks	3%
		BBQs and other food preparation areas	3%
		Rest areas/seats/picnic tables	3%
		Flat/cleared ground (wheelchair friendly) smooth water	1%
		Ease restrictions	1%
		Safety (general)	1%
		Garbage bins	1%
		Fauna/native animals	1%
		Swimming areas	1%
		Information boards	1%
		Children playgrounds or play areas	1%
		Water / taps	1%

Table 16. Barriers and preferences - Hiking with overnight camping

Barriers	%	Preferences	%
Lack of time	67%	Toilets	33%
Cost of participating	14%	Scenery/ views (eg waterfalls)	23%
Health problems	12%	Showers	23%
Lack of local opportunities	7%	Cleared paths or trails through the bush (unsealed)	20%
Not suitable for children/can't take children along	7%	Completely unspoilt surroundings	15%
Have no one (including pets) to do this activity with	7%	No additional facilities	13%
Bad weather (including rain or drought)	5%	Water / taps	13%
Need to organise	5%	Trees	10%
Don't have the right equipment	2%	Fauna/native animals	10%
Don't have transport/no way to get there/accessibility	2%	Campsites	10%
Not fit enough to do this activity	2%	BBQs and other food preparation areas	10%
Fatigue/lack of motivation	2%	Equipment hire / access to equipment	8%
		Rest areas/seats/picnic tables	8%
		Clean, well maintained environment	3%
		Safety (general)	3%
		Access to emergency services	3%
		Mobile phone coverage	3%
		Flora/native trees, plants and flowers	3%
		Parking	3%
		Good road conditions/accessibility	3%
		Cabins	3%
		Brochures or maps/online info/promotion	3%
		Information boards	3%
		Signage	3%
		Cafes or restaurants	3%
		Sealed paths or boardwalks	3%

Table 17. Barriers and preferences - Horse riding

Barriers	%	Preferences	%
Lack of time	38%	No additional facilities	33%
Don't have the right equipment	38%	Cleared paths or trails through the bush (unsealed)	22%
Health problems	14%	Scenery/ views (eg waterfalls)	18%
Cost of participating	8%	Flat/cleared ground (wheelchair friendly) smooth water	13%
Fear of getting injured	8%	Equipment hire / access to equipment	11%
Unaware of local opportunities to do activity	5%	Safety (general)	4%
Lack of local opportunities	5%	Completely unspoilt surroundings	4%
Have no one (including pets) to do this activity with	5%	Flora/native trees, plants and flowers	4%
Don't have transport/no way to get there/accessibility	3%	Good road conditions/accessibility	4%
Age/getting old	3%	Water / taps	4%
Seasonal/prefer warmer weather	3%	Toilets	4%
		More restrictions	2%
		Ease restrictions	2%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	2%
		Leafy background	2%
		Isolation / infrequent to no contact with other people	2%
		Signage	2%
		Children playgrounds or play areas	2%
		Cafes or restaurants	2%
		Shops or kiosks	2%

Table 18. Barriers and preferences - Mountain biking

Barriers	%	Preferences	%
Lack of time	48%	Cleared paths or trails through the bush (unsealed)	41%
Lack of local opportunities	24%	Sealed paths or boardwalks	24%
Don't have the right equipment	24%	Completely unspoilt surroundings	17%
Fatigue/lack of motivation	12%	No additional facilities	10%
Not suitable for children/can't take children along	8%	Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	10%
Too busy doing other recreational activities	8%	Good road conditions/accessibility	10%
Unaware of local opportunities to do activity	4%	Signage	10%
Have no one (including pets) to do this activity with	4%	Flora/native trees, plants and flowers	7%
Health problems	4%	Separate wide paths away from traffic/cycles	3%
Age/getting old	4%	Flat/cleared ground (wheelchair friendly) smooth water	3%
		Equipment hire / access to equipment	3%
		Trees	3%
		Fauna/native animals	3%
		Historic heritage sites	3%
		Toilets	3%

Table 19. Barriers and preferences - Nature study

Barriers	%	Preferences	%
Lack of time	65%	No additional facilities	21%
Lack of local opportunities	13%	Completely unspoilt surroundings	18%
Health problems	10%	Fauna/native animals	18%
Have no one (including pets) to do this activity with	8%	Scenery/ views (eg waterfalls)	17%
Need to organise	5%	Toilets	10%
Transport costs (including petrol or public transport)	3%	Good road conditions/accessibility	9%
Cost of participating	3%	Trees	6%
Don't have transport/no way to get there/accessibility	3%	Flora/native trees, plants and flowers	6%
Unaware of local opportunities to do activity	2%	Lookouts	6%
Don't have the right equipment	2%	Brochures or maps/online info/promotion	5%
Fatigue/lack of motivation	2%	Rest areas/seats/picnic tables	5%
Age/getting old	2%	Isolation / infrequent to no contact with other people	4%
No amenities	2%	Information boards	4%
No experience/skilled	2%	Cleared paths or trails through the bush (unsealed)	4%
		BBQs and other food preparation areas	4%
		Flat/cleared ground (wheelchair friendly) smooth water	2%
		Clean, well maintained environment	2%
		Shelters	2%
		Signage	2%
		Children playgrounds or play areas	2%
		Sealed paths or boardwalks	2%
		Other	1%
		Fuel	1%
		Amenities / facilities (not further specified)	1%
		Historic heritage sites	1%
		Swimming areas	1%
		Other accommodation (eg hostels, motels, etc)	1%
		Guided tours/audioguides	1%
		Hand rails/fence	1%
		Water / taps	1%
		Showers	1%

Table 20. Barriers and preferences - Picnicking

Barriers	%	Preferences	%
Lack of time	57%	Toilets	35%
Have no one (including pets) to do this activity with	13%	BBQs and other food preparation areas	25%
Lack of occasions/invitations presenting (external)	13%	Rest areas/seats/picnic tables	22%
Cost of participating	8%	Water / taps	13%
Bad weather (including rain or drought)	8%	No additional facilities	11%
Lack of local opportunities	7%	Scenery/ views (eg waterfalls)	11%
Fatigue/lack of motivation	6%	Amenities / facilities (not further specified)	9%
Health problems	5%	Garbage bins	9%
Transport costs (including petrol or public transport)	2%	Shelters	8%
Don't have transport/no way to get there/accessibility	1%	Clean, well maintained environment	8%
Not suitable for children/can't take children along	1%	Flat/cleared ground (wheelchair friendly) smooth water	7%
Not fit enough to do this activity	1%	Shade	6%
Too busy doing other recreational activities	1%	Good road conditions/accessibility	6%
Safety concerns	1%	Swimming areas	6%
No amenities	1%	Fauna/native animals	5%
Need to organise	1%	Parking	5%
Need shade	1%	Trees	4%
		Flora/native trees, plants and flowers	4%
		Children playgrounds or play areas	4%
		Cleared paths or trails through the bush (unsealed)	4%
		Other	3%
		Garden	2%
		Safety (general)	2%
		Leafy background	2%
		Isolation / infrequent to no contact with other people	2%
		Signage	2%
		Shops or kiosks	2%
		Beach/sandy areas	1%
		Separate wide paths away from traffic/cycles	1%
		Completely unspoilt surroundings	1%
		Other people present (fellow recreationists)	1%
		Other accommodation (eg hostels, motels, etc)	1%
		Information boards	1%
		Cafes or restaurants	1%
		Firewood	1%
		Lighting	1%
		Access to emergency services	1%
		Public transport	1%
		Not too crowded	1%
		Powered campsites	1%
		Ranger / management presence	1%
		Brochures or maps/online info/promotion	1%
		Showers	1%

Table 21. Barriers and preferences - Rock climbing, abseiling, or canyoning

Barriers	%	Preferences	%
Lack of time	35%	No additional facilities	27%
Lack of local opportunities	32%	Safety (general)	27%
Don't have transport/no way to get there/accessibility	19%	Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	12%
Unaware of local opportunities to do activity	13%	Instructors / coaches / training	12%
Don't have the right equipment	13%	Completely unspoilt surroundings	12%
Cost of participating	10%	Scenery/ views (eg waterfalls)	8%
Have no one (including pets) to do this activity with	6%	Good road conditions/accessibility	8%
Cost of equipment required to do activity	3%	Rest areas/seats/picnic tables	8%
No experience/skilled	3%	Amenities / facilities (not further specified)	4%
Environmental concern	3%	Clean, well maintained environment	4%
		Equipment hire / access to equipment	4%
		Historic heritage sites	4%
		Other accommodation (eg hostels, motels, etc)	4%
		Brochures or maps/online info/promotion	4%
		Signage	4%
		Cleared paths or trails through the bush (unsealed)	4%
		BBQs and other food preparation areas	4%
		Toilets	4%

Table 22. Barriers and preferences - Running or jogging outdoors

Barriers	%	Preferences	%
Lack of time	57%	Cleared paths or trails through the bush (unsealed)	51%
Fatigue/lack of motivation	18%	No additional facilities	24%
Health problems	14%	Scenery/ views (eg waterfalls)	14%
Not suitable for children/can't take children along	7%	Signage	14%
Bad weather (including rain or drought)	7%	Flat/cleared ground (wheelchair friendly) smooth water	8%
Not fit enough to do this activity	7%	Completely unspoilt surroundings	8%
Lack of local opportunities	4%	Safety (general)	5%
Too busy doing other recreational activities	4%	Sealed paths or boardwalks	5%
		Water / taps	5%
		Rest areas/seats/picnic tables	5%
		Separate wide paths away from traffic/cycles	3%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	3%
		Shelters	3%
		Good road conditions/accessibility	3%
		Toilets	3%

Table 23. Barriers and preferences - Scenic driving with a car or motorbike

Barriers	%	Preferences	%
Lack of time	77%	Scenery/ views (eg waterfalls)	26%
Transport costs (including petrol or public transport)	14%	Good road conditions/accessibility	20%
Cost of participating	14%	No additional facilities	16%
Don't have the right equipment	5%	Toilets	12%
Health problems	4%	Lookouts	10%
Don't have transport/no way to get there/accessibility	4%	Rest areas/seats/picnic tables	9%
Lack of local opportunities	3%	Safety (general)	8%
Not fit enough to do this activity	3%	Clean, well maintained environment	6%
Fatigue/lack of motivation	3%	Shelters	6%
Too busy doing other recreational activities	2%	Signage	6%
Unaware of local opportunities to do activity	1%	Completely unspoilt surroundings	5%
Have no one (including pets) to do this activity with	1%	Fauna/native animals	5%
No licence	1%	BBQs and other food preparation areas	5%
		Leafy background	4%
		Flora/native trees, plants and flowers	4%
		Historic heritage sites	4%
		Amenities / facilities (not further specified)	3%
		Parking	3%
		Brochures or maps/online info/promotion	3%
		Cafes or restaurants	3%
		Sealed paths or boardwalks	3%
		Trees	2%
		Not too crowded	2%
		Information boards	2%
		Water / taps	2%
		Beach/sandy areas	1%
		Separate wide paths away from traffic/cycles	1%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	1%
		Instructors / coaches / training	1%
		Equipment hire / access to equipment	1%
		Aboriginal heritage sites	1%
		Isolation / infrequent to no contact with other people	1%
		Children playgrounds or play areas	1%
		Shops or kiosks	1%
		Cleared paths or trails through the bush (unsealed)	1%

Table 24. Barriers and preferences - Snow sports

Barriers	%	Preferences	%
Lack of local opportunities	57%	No additional facilities	44%
Cost of participating	38%	Toilets	17%
Lack of time	30%	Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	14%
Bad weather (including rain or drought)	11%	Cafes or restaurants	14%
Cost of equipment required to do activity	8%	Ski lifts	11%
Not suitable for children/can't take children along	5%	Other accommodation (eg hostels, motels, etc)	8%
Don't have transport/no way to get there/accessibility	3%	Shops or kiosks	8%
Not fit enough to do this activity	3%	Clean, well maintained environment	6%
Lack of occasions/invitations presenting (external)	3%	Access to emergency services	6%
		Shelters	6%
		Not too crowded	6%
		Other	3%
		Instructors / coaches / training	3%
		Equipment hire / access to equipment	3%
		Safety (general)	3%
		Trees	3%
		Completely unspoilt surroundings	3%
		Scenery/ views (eg waterfalls)	3%
		Parking	3%
		Good road conditions/accessibility	3%
		Children playgrounds or play areas	3%
		Cleared paths or trails through the bush (unsealed)	3%
		Water / taps	3%
		BBQs and other food preparation areas	3%
		Showers	3%

Table 25. Barriers and preferences - Sports involving motorised watercraft

Barriers	%	Preferences	%
Lack of time	48%	Boat ramp / boat access	29%
Don't have the right equipment	20%	Toilets	21%
Don't have transport/no way to get there/accessibility	20%	No additional facilities	17%
Lack of local opportunities	15%	BBQs and other food preparation areas	17%
Cost of participating	13%	Water / taps	13%
Bad weather (including rain or drought)	12%	Jetty	8%
Cost of equipment required to do activity	8%	Shelters	8%
Transport costs (including petrol or public transport)	5%	Amenities / facilities (not further specified)	6%
Have no one (including pets) to do this activity with	3%	Clean, well maintained environment	6%
Health problems	3%	Scenery/ views (eg waterfalls)	6%
Fatigue/lack of motivation	3%	Good road conditions/accessibility	6%
Not suitable for children/can't take children along	2%	Fauna/native animals	5%
Too busy doing other recreational activities	2%	Beach/sandy areas	3%
Age/getting old	2%	Equipment hire / access to equipment	3%
No licence	2%	Safety (general)	3%
		Completely unspoilt surroundings	3%
		Parking	3%
		Signage	3%
		Ease restrictions	2%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	2%
		Shade	2%
		Other people present (fellow recreationists)	2%
		Other accommodation (eg hostels, motels, etc)	2%
		Campsites	2%
		Brochures or maps/online info/promotion	2%
		Information boards	2%
		Children playgrounds or play areas	2%
		Shops or kiosks	2%
		Rest areas/seats/picnic tables	2%
		Change rooms	2%
		Showers	2%

Table 26. Barriers and preferences - Sports involving non-motorised watercraft

Barriers	%	Preferences	%
Lack of time	41%	No additional facilities	15%
Don't have transport/no way to get there/accessibility	29%	Good road conditions/accessibility	15%
Lack of local opportunities	24%	Clean, well maintained environment	13%
Don't have the right equipment	14%	Boat ramp / boat access	10%
Cost of equipment required to do activity	6%	Toilets	10%
Cost of participating	6%	Completely unspoilt surroundings	8%
Have no one (including pets) to do this activity with	6%	Equipment hire / access to equipment	6%
Bad weather (including rain or drought)	6%	Swimming areas	6%
Unaware of local opportunities to do activity	2%	Shelters	4%
Transport costs (including petrol or public transport)	2%	Leafy background	4%
Not suitable for children/can't take children along	2%	Fauna/native animals	4%
Fatigue/lack of motivation	2%	Scenery/ views (eg waterfalls)	4%
Age/getting old	2%	Other people present (fellow recreationists)	4%
		Rest areas/seats/picnic tables	4%
		Separate wide paths away from traffic/cycles	2%
		Ease restrictions	2%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	2%
		Amenities / facilities (not further specified)	2%
		Instructors / coaches / training	2%
		Shade	2%
		Garbage bins	2%
		Historic heritage sites	2%
		Not too crowded	2%
		Campsites	2%
		Children playgrounds or play areas	2%
		Water / taps	2%
		BBQs and other food preparation areas	2%
		Showers	2%

Table 27. Barriers and preferences - Trail or quad bike riding

Barriers	%	Preferences	%
Lack of time	52%	Cleared paths or trails through the bush (unsealed)	43%
Don't have the right equipment	30%	Scenery/ views (eg waterfalls)	17%
Health problems	12%	Good road conditions/accessibility	17%
Lack of local opportunities	9%	No additional facilities	10%
Don't have transport/no way to get there/accessibility	9%	Sealed paths or boardwalks	10%
Have no one (including pets) to do this activity with	6%	Safety (general)	7%
Fear of getting injured	6%	Completely unspoilt surroundings	7%
Cost of participating	3%	Ease restrictions	3%
Bad weather (including rain or drought)	3%	Garden	3%
Too busy doing other recreational activities	3%	Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	3%
Fatigue/lack of motivation	3%	Amenities / facilities (not further specified)	3%
Age/getting old	3%	Clean, well maintained environment	3%
		Not too crowded	3%
		Information boards	3%
		Rest areas/seats/picnic tables	3%

Table 28. Barriers and preferences - Visiting Aboriginal and other cultural heritage sites

Barriers	%	Preferences	%
Lack of time	50%	Information boards	26%
Lack of local opportunities	23%	No additional facilities	20%
Unaware of local opportunities to do activity	13%	Aboriginal heritage sites	18%
Transport costs (including petrol or public transport)	10%	Brochures or maps/online info/promotion	12%
Cost of participating	9%	Completely unspoilt surroundings	9%
Don't have transport/no way to get there/accessibility	9%	Good road conditions/accessibility	7%
Have no one (including pets) to do this activity with	7%	Sealed paths or boardwalks	7%
Health problems	6%	Historic heritage sites	5%
Fatigue/lack of motivation	4%	Cleared paths or trails through the bush (unsealed)	5%
Lack of variety/bored with local opportunities	4%	Toilets	5%
Not suitable for children/can't take children along	3%	Scenery/ views (eg waterfalls)	4%
Not fit enough to do this activity	3%	Signage	4%
Too busy doing other recreational activities	3%	Clean, well maintained environment	3%
Age/getting old	3%	Guided tours/audioguides	3%
Only do this when travelling	3%	Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	1%
Lack of occasions/invitations presenting (external)	1%	Instructors / coaches / training	1%
No licence	1%	Safety (general)	1%
		Shade	1%
		Shelters	1%
		Trees	1%
		Leafy background	1%
		Flora/native trees, plants and flowers	1%
		Public transport	1%
		Swimming areas	1%
		Isolation / infrequent to no contact with other people	1%
		Visitors' centre	1%
		Children playgrounds or play areas	1%
		Cafes or restaurants	1%
		Water / taps	1%
		BBQs and other food preparation areas	1%
		Rest areas/seats/picnic tables	1%

Table 29. Barriers and preferences - Visiting landmarks, lookouts and scenery

Barriers	%	Preferences	%
Lack of time	72%	Toilets	28%
Cost of participating	16%	Scenery/ views (eg waterfalls)	26%
Don't have transport/no way to get there/accessibility	13%	No additional facilities	13%
Transport costs (including petrol or public transport)	10%	Good road conditions/accessibility	12%
Lack of local opportunities	6%	Rest areas/seats/picnic tables	12%
Health problems	6%	BBQs and other food preparation areas	11%
Have no one (including pets) to do this activity with	6%	Historic heritage sites	10%
Lack of variety/bored with local opportunities	5%	Safety (general)	9%
Too busy doing other recreational activities	4%	Shelters	8%
Fatigue/lack of motivation	2%	Information boards	8%
Lack of occasions/invitations presenting (external)	2%	Lookouts	7%
Age/getting old	1%	Completely unspoilt surroundings	6%
Only do this when travelling	1%	Cleared paths or trails through the bush (unsealed)	6%
Cannot take pets along	1%	Clean, well maintained environment	5%
Need to organise	1%	Sealed paths or boardwalks	5%
No licence	1%	Brochures or maps/online info/promotion	5%
		Signage	5%
		Fauna/native animals	4%
		Water / taps	4%
		Trees	3%
		Flora/native trees, plants and flowers	3%
		Children playgrounds or play areas	3%
		Amenities / facilities (not further specified)	2%
		Garbage bins	2%
		Aboriginal heritage sites	2%
		Campsites	2%
		Showers	2%
		Flat/cleared ground (wheelchair friendly) smooth water	1%
		Ease restrictions	1%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	1%
		Mobile phone coverage	1%
		Parking	1%
		Not too crowded	1%
		Ranger / management presence	1%
		Shops or kiosks	1%
		Hand rails/fence	1%
		Change rooms	1%

Table 30. Barriers and preferences - Volunteer work for the environment

Barriers	%	Preferences	%
Lack of time	64%	No additional facilities	37%
Lack of local opportunities	15%	Clean, well maintained environment	12%
Unaware of local opportunities to do activity	13%	Trees	12%
Health problems	9%	Flora/native trees, plants and flowers	7%
Have no one (including pets) to do this activity with	8%	Ranger / management presence	6%
Too busy doing other recreational activities	4%	Toilets	6%
Fatigue/lack of motivation	4%	Equipment hire / access to equipment	4%
Age/getting old	4%	Completely unspoilt surroundings	4%
Lack of occasions/invitations presenting (external)	4%	Other people present (fellow recreationists)	4%
Need to organise	4%	Water / taps	4%
Cost of participating	2%	BBQs and other food preparation areas	4%
Pollution	2%	Instructors / coaches / training	3%
		Shelters	3%
		Garbage bins	3%
		Brochures or maps/online info/promotion	3%
		Cleared paths or trails through the bush (unsealed)	3%
		Other	1%
		Flat/cleared ground (wheelchair friendly) smooth water	1%
		Safety (general)	1%
		Good road conditions/accessibility	1%
		Hand rails/fence	1%
		Sealed paths or boardwalks	1%
		Rest areas/seats/picnic tables	1%
		Showers	1%

Table 31. Barriers and preferences - Walking on roads or footpaths for recreation

Barriers	%	Preferences	%
Lack of time	57%	Cleared paths or trails through the bush (unsealed)	40%
Lack of local opportunities	15%	No additional facilities	19%
Fatigue/lack of motivation	14%	Scenery/ views (eg waterfalls)	13%
Poor quality/maintenance of roads/paths; no suitable walking paths	9%	Completely unspoilt surroundings	10%
Health problems	8%	Sealed paths or boardwalks	8%
Bad weather (including rain or drought)	7%	Signage	6%
Traffic	5%	Garden	5%
Have no one (including pets) to do this activity with	3%	Safety (general)	5%
Not fit enough to do this activity	2%	Trees	5%
Fear of getting injured	2%	Fauna/native animals	5%
Too busy doing other recreational activities	2%	Rest areas/seats/picnic tables	5%
Age/getting old	2%	Flora/native trees, plants and flowers	4%
Not suitable for children/can't take children along	1%	Good road conditions/accessibility	4%
Don't have transport/no way to get there/accessibility	1%	Shade	2%
Fear for own safety among strangers	1%	Water / taps	2%
Safety concerns	1%	Toilets	2%
Lack of variety/bored with local opportunities	1%	Lighting	2%
Only do this when travelling	1%	Clean, well maintained environment	2%
		Historic heritage sites	2%
		Brochures or maps/online info/promotion	2%
		Information boards	2%
		Flat/cleared ground (wheelchair friendly) smooth water	1%
		More restrictions	1%
		Access to emergency services	1%
		Mobile phone coverage	1%
		Garbage bins	1%
		Parking	1%
		Not too crowded	1%
		Isolation / infrequent to no contact with other people	1%
		Campsites	1%
		Children playgrounds or play areas	1%
		Cafes or restaurants	1%
		Hand rails/fence	1%
		BBQs and other food preparation areas	1%

Table 32. Barriers and preferences - Water sports

Barriers	%	Preferences	%
Lack of local opportunities	50%	No additional facilities	22%
Lack of time	38%	Swimming areas	18%
Bad weather (including rain or drought)	20%	Clean, well maintained environment	16%
Cost of participating	7%	Toilets	15%
Not fit enough to do this activity	5%	Safety (general)	14%
Not suitable for children/can't take children along	4%	Showers	8%
Don't have the right equipment	4%	Completely unspoilt surroundings	7%
Transport costs (including petrol or public transport)	3%	Children playgrounds or play areas	7%
Health problems	3%	Good road conditions/accessibility	6%
Fatigue/lack of motivation	3%	BBQs and other food preparation areas	6%
Don't have transport/no way to get there/accessibility	2%	Rest areas/seats/picnic tables	6%
Unaware of local opportunities to do activity	1%	Beach/sandy areas	5%
Cost of equipment required to do activity	1%	Access to emergency services	5%
Have no one (including pets) to do this activity with	1%	Shelters	5%
Fear of wildlife / getting bitten/stung etc	1%	Signage	4%
Too busy doing other recreational activities	1%	Change rooms	4%
Location is too crowded	1%	Amenities / facilities (not further specified)	3%
Pollution	1%	Equipment hire / access to equipment	3%
		Fauna/native animals	3%
		Scenery/ views (eg waterfalls)	3%
		Parking	3%
		Shops or kiosks	3%
		Water / taps	3%
		Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc	2%
		Not too crowded	2%
		Other accommodation (eg hostels, motels, etc)	2%
		Boat ramp / boat access	2%
		Jetty	2%
		Garbage bins	2%
		Flora/native trees, plants and flowers	2%
		Campsites	2%
		Ranger / management presence	2%
		Other	1%
		Flat/cleared ground (wheelchair friendly) smooth water	1%
		Ease restrictions	1%
		Fish cleaning areas	1%
		Shade	1%
		Trees	1%
		Historic heritage sites	1%
		Other people present (fellow recreationists)	1%
		Information boards	1%

Table 33. Actionable barriers for outdoor recreation activities by age and gender*

	Male				Female				Total
	18-24	25-34	35-44	45-75	18-24	25-34	35-44	45-75	
Running or jogging outdoors	0%	0%	0%	9%	0%	0%	0%	0%	3%
Four-wheel driving	25%	0%	0%	0%	0%	10%	0%	0%	3%
Scenic driving with a car or motorbike		8%	0%	0%	50%	10%	0%	2%	3%
Car camping	0%	18%	0%	0%	0%	0%	0%	10%	4%
Visiting landmarks, lookouts and scenery	17%	13%	14%	8%	0%	0%	10%	0%	6%
Picnicking	0%	6%	6%	9%	33%	13%	6%	0%	6%
Hiking with overnight camping	50%	50%	0%	11%	0%	0%	0%	0%	7%
Trail bike or quad bike riding	0%	25%	11%	0%	0%	0%	0%	0%	7%
Bushwalking for 2+ hrs, but not overnight	17%	0%	13%	0%	0%	33%	0%	8%	9%
Walking on roads or footpaths for recreation		0%	0%	9%	0%	14%	0%	11%	9%
Horse riding	0%	20%	0%	0%	0%	33%	0%	14%	10%
Nature study	0%	0%	0%	13%		10%	40%	10%	12%
Sports involving motorised watercraft	0%	27%	0%	7%	0%	25%	20%	27%	15%
Bushwalking for <2 hrs	0%	20%	13%	13%	67%	26%	8%	17%	17%
Cycling on roads or footpaths for recreation	33%	14%	0%	17%	0%	29%	13%	21%	18%
Volunteer work for the environment	100%	17%	0%	23%		0%	38%	19%	20%
Fishing	0%	25%	11%	22%	0%	33%	25%	17%	20%
Mountain biking	0%	25%	0%	33%	0%	33%	50%	33%	23%
Sports involving non-motorised watercraft	0%	8%	11%	11%	100%	25%	83%	50%	25%
Cycling on a sealed bike path or track	50%	0%	17%	47%	0%	17%	33%	30%	28%
Visiting Aboriginal & other cultural heritage sites	100%	50%	67%	14%	0%	45%	50%	32%	32%
Rock climbing, abseiling, caving or canyoning	20%	67%	43%	0%		67%	0%	44%	44%
Water sports	57%	36%	67%	54%	67%	54%	40%	34%	48%
Snow sports	86%	40%	67%	67%	100%	50%	80%	0%	57%
Attending outdoor concerts/music festivals	50%	42%	50%	68%	100%	62%	73%	62%	62%

* No significance testing done for this table, as base varies



MOTIVATIONS

Table 34. Motivations among participants in activities

	I like to get outdoors for the health benefits, like breathing the fresh air	I enjoy getting outdoors to spend time with my family or friends	I like to spend time outdoors to get a break from my day-to-day routine	I like to get outdoors for the peace and quiet	I prefer to exercise in the outdoors rather than inside	I'm willing to travel a bit further to find more untouched places for outdoor activities	I'm interested in learning about the history or cultural heritage of places I visit in the outdoors	I enjoy learning about the animals and plants of places I visit in the outdoors	I find the opportunities for adventure and challenge in the outdoors appealing	I seek isolation and escape in the outdoors
Walking on roads or footpaths for recreation	8.2	8.3	7.9	8.0	7.9	6.8	6.9	7.3	6.8	5.9
Bushwalking for <2 hrs	8.2	8.5	7.9	8.0	8.2	7.1	7.3	7.7	7.3	6.5
Bushwalking for 2+ hrs, but not overnight	8.5	8.7	8.1	8.5	8.4	7.4	7.6	7.9	7.7	6.9
Hiking with overnight camping	8.5	9.0	8.3	8.6	8.6	7.9	7.2	7.9	8.0	7.3
Running or jogging outdoors	7.9	8.7	8.1	8.0	8.2	7.1	6.7	7.2	7.6	6.0
Cycling on roads or footpaths for recreation	8.1	8.6	8.0	8.2	8.2	7.2	6.8	7.5	7.6	6.3
Cycling on a sealed bike path or track	8.1	8.6	8.2	8.1	8.5	7.2	6.8	7.5	7.6	5.9
Mountain biking	8.2	8.2	7.5	8.0	8.3	7.2	7.0	7.5	8.1	6.4
Picnicking	8.0	8.4	7.7	8.0	7.7	6.9	6.9	7.3	6.8	6.0
Car camping	8.0	8.7	8.0	8.1	8.0	7.3	6.8	7.0	7.4	6.4
Snow sports	7.9	8.8	7.7	6.8	7.8	7.6	6.9	6.6	7.5	5.1
Water sports	8.0	8.5	7.9	7.9	7.7	7.0	6.7	7.1	7.1	5.9
Sports involving motorised watercraft	7.5	8.6	7.9	7.8	7.9	7.3	6.6	7.2	7.3	6.0
Sports involving non-motorised watercraft	8.2	8.9	8.2	8.1	8.2	7.5	7.5	8.0	7.8	6.6

Scenic driving with a car or motorbike	8.2	8.4	7.8	8.0	7.8	7.2	7.2	7.5	7.1	6.2
Four-wheel driving	8.0	8.7	8.1	8.3	8.2	7.5	7.1	7.5	7.3	6.5
Trail bike or quad bike riding	7.8	8.7	7.9	8.0	8.4	7.1	7.0	7.5	8.1	6.2
Rock climbing, abseiling, caving or canyoning	8.3	8.7	8.2	8.1	8.5	7.8	7.7	8.0	8.3	6.8
Visiting landmarks, lookouts and scenery	8.1	8.4	7.8	8.0	7.8	7.1	7.2	7.6	7.0	6.2
Visiting Aboriginal & other cultural heritage sites	8.5	8.5	8.1	8.3	7.9	7.2	7.7	7.8	7.1	6.3
Nature study	8.3	8.5	8.1	8.3	8.1	7.2	7.6	8.2	7.1	6.5
Volunteer work for the environment	8.2	8.3	7.9	8.2	7.9	7.1	7.5	7.9	7.3	6.6
Attending outdoor concerts/music festivals	8.0	8.5	7.7	8.0	7.4	6.9	7.0	7.1	6.8	6.1
Fishing	7.9	8.6	8.1	7.9	7.9	7.2	6.8	7.3	7.3	6.2
Horse riding	8.0	8.8	7.5	8.3	8.3	6.8	6.9	7.8	7.6	6.9

* No significance testing done for this table

Table 35. Motivations among those very interested in doing activities more often

	I like to get outdoors for the health benefits, like breathing the fresh air	I enjoy getting outdoors to spend time with my family or friends	I like to spend time outdoors to get a break from my day-to-day routine	I like to get outdoors for the peace and quiet	I prefer to exercise in the outdoors rather than inside	I'm willing to travel a bit further to find more untouched places for outdoor activities	I'm interested in learning about the history or cultural heritage of places I visit in the outdoors	I enjoy learning about the animals and plants of places I visit in the outdoors	I find the opportunities for adventure and challenge in the outdoors appealing	I seek isolation and escape in the outdoors
Walking on roads or footpaths for recreation	8.9	8.7	8.5	8.2	8.2	7.1	7.4	7.8	7.2	6.4
Bushwalking for <2 hrs	9.4	8.9	9.1	9.1	9.0	8.4	8.4	8.4	8.4	8.3
Bushwalking for 2+ hrs, but not overnight	9.8	9.1	9.1	9.0	8.7	8.5	8.8	8.8	9.1	8.5
Hiking with overnight camping	9.6	9.4	9.7	9.4	9.2	9.1	8.5	8.9	9.5	8.8
Running or jogging outdoors	8.9	9.4	8.8	8.5	8.5	7.9	7.0	7.3	8.2	6.6
Cycling on roads or footpaths for recreation	8.8	8.6	8.0	8.3	8.5	7.4	7.1	8.0	7.2	6.7
Cycling on a sealed bike path or track	8.7	8.7	8.3	8.6	7.8	7.8	6.9	7.6	7.8	7.1
Mountain biking	9.5	7.7	9.4	8.7	8.4	8.8	7.3	8.2	8.8	8.0
Picnicking	9.1	9.2	8.5	8.7	7.9	7.5	7.4	7.7	7.3	6.6
Car camping	8.5	9.2	8.8	8.9	8.5	8.0	7.6	8.0	8.0	7.4
Snow sports	8.4	8.7	8.1	8.3	8.4	7.6	7.5	7.6	8.0	5.7
Water sports	8.2	8.7	8.2	7.9	8.2	7.3	6.9	7.6	7.6	6.5
Sports involving motorised watercraft	8.0	8.9	8.8	8.2	8.0	7.7	6.5	7.5	8.0	6.6

Sports involving non-motorised watercraft	9.0	8.9	8.9	8.4	8.6	7.9	8.3	8.5	8.7	7.1
Scenic driving with a car or motorbike	8.9	9.1	8.9	8.7	8.1	8.3	8.2	8.4	8.2	7.4
Four-wheel driving	9.0	9.2	9.0	9.2	8.4	8.8	8.1	8.2	8.3	7.8
Trail bike or quad bike riding	8.1	8.9	8.4	8.4	8.6	7.8	7.3	7.5	8.4	6.8
Rock climbing, abseiling, caving or canyoning	8.7	9.1	8.4	8.5	8.0	8.1	7.6	7.7	8.5	7.3
Visiting landmarks, lookouts and scenery	9.2	9.1	9.2	8.7	8.3	8.2	8.5	8.3	8.3	7.6
Visiting Aboriginal & other cultural heritage sites	9.6	9.1	9.1	8.5	8.2	8.5	9.1	8.8	8.7	7.8
Nature study	8.9	9.0	8.8	8.6	8.3	7.5	8.4	8.9	7.5	7.3
Volunteer work for the environment	9.4	9.4	8.6	9.0	8.5	7.5	8.1	8.8	7.9	8.3
Attending outdoor concerts/music festivals	8.5	8.9	8.2	8.3	7.8	7.4	7.3	7.7	7.6	6.6
Fishing	8.5	9.2	8.9	8.8	8.3	7.8	7.1	7.8	7.9	6.9
Horse riding	8.5	9.0	8.5	8.8	8.6	7.4	7.8	7.9	8.0	7.1

* No significance testing done for this table

APPENDIX D: FORECASTING METHODOLOGY

The forecasted populations for the demographic and cohort approach are found in the tables below. The percentage increase is the estimated increase in that age by gender group across the NSW population, as modeled by the Australian Bureau of Statistics³. This percentage was then applied as a weight to the 2009 population figures for Northern Tablelands to derive the 2018 estimated population.

Forecasted population - Demographic approach

		2009	2018 estimate	% increase
Male	18-24	9,829	10,247	4%
	25-34	12,313	14,274	16%
	35-44	15,031	15,627	4%
	45-54	16,120	16,436	2%
	55-64	14,252	16,241	14%
	65-75	10,265	14,396	40%
Female	18-24	9,643	10,011	4%
	25-34	12,945	14,723	14%
	35-44	15,819	16,285	3%
	45-54	16,200	16,604	2%
	55-64	13,953	16,329	17%
	65-75	10,708	14,905	39%
Total		157,077	176,078	12%

³ Based on Australian Bureau of Statistics 3222.0 Population Projections, Australia, TABLE B1. Population projections, By age and sex, New South Wales - Series B. Series B largely reflects current trends in fertility, life expectancy at birth, net overseas migration and net interstate migration.

Forecasted population - Cohort approach

		2009	2018 estimate	% increase
Male	18-33	20,670	22,910	11%
	34-43	14,826	15,583	5%
	44-53	16,281	16,492	1%
	54-63	14,529	16,430	13%
	64-73	9,975	13,758	38%
	74-75	1,529	2,135	40%
Female	18-33	20,934	22,918	9%
	34-43	15,662	16,259	4%
	44-53	16,488	16,809	2%
	54-63	14,266	16,518	16%
	64-73	10,266	14,183	38%
	74-75	1,651	2,215	34%
Total		157,077	176,210	12%

Scenario 2: Actionable barriers are addressed and both participation and frequency increase

Method for estimating frequency

Interest in doing an activity more often was converted into a probability, according to the following scale:

Stated interest	Probability
0-4	0%
5	16.66666667%
6	33.33333333%
7	50%
8	66.66666667%
9	83.33333333%
10	100%

- For non-participants, this probability was multiplied by the proportion that cited at least one of the two 'actionable barriers' (averaged across the total sample, due to low cell sizes). Recall that barriers were only asked of those whose stated interest was at least five, as it was assumed that those who had a stated interest of lower would not actually participate more in the future.
- For current participants, their highest possible level of future participation was estimated to be that of the participant 10% higher. For example, for an activity with 100 current participants in Northern Tablelands, if these participants were lined up from least to most frequent, the participant will move up 10 places (10%) along this 'line'. This would be their highest possible level of future participation. So the least frequent participant, at the start of the line, would in the future, shift to participate at the level of the 11th person along the line.
 - Similarly to the calculation for non-participants, the extent of a participant's shift was reduced by multiplying by probability and by the proportion who cited

actionable barriers. For example, for an activity, one current participant has a stated interest of 7 and does the activity 6 times a year. When the participants are ordered from least to most frequent, this participant is 57th along the line. As the activity has 70 participants, the highest possible level of future participation is that of the 64th person along the line, which is 12 times per year. From their stated interest, we estimate that their probability of shifting to 12 times per year (the highest possible level of future participation) is 50%. Across the whole sample, 28% cited an actionable barrier for this activity. The final estimate is calculated as shown in the diagram below

Figure D1. Calculation of forecasted participation for current participants

$$6 + ((12 - 6) \times 50\% \times 28\%) = 6.4$$

↑

Current participation
(times per year)

⏟

Potential shift
(difference between frequency of activity of participant 7 places higher and current participation)

↑

Probability of moving higher
(estimated from stated interest in doing activity more often)

↑

Actionable barriers
(averaged across whole sample due to small cell sizes)

↑

Forecasted participation
(times per year)

- In cases where the participant 10% further up 'the line' had the same level of participation, the highest possible level of participation was assumed to be 1 time per year higher.
- For those in the top 10% of participation, the cut-off values were used as the highest possible level of future participation (see Section 4.2, Table 4.2.2, Data Trimming).





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