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## **Nature-based outdoor recreation demand and preferences – Quantitative research findings**

### **South Coast**

Prepared for Parks and Wildlife Group, NSW Department of  
Environment, Climate Change and Water

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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 South Coast 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 (86% participation), walking on roads or footpaths for recreation (82% participation), visiting landmarks, lookouts or scenery (81% participation), scenic driving with a car or motorbike (75% participation), and water sports and bushwalking for less than two hours, but not overnight (both 64%).
- 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 (121.8 times per year), nature study (100.9 times per year), running or jogging outdoors (69.5 times per year), cycling on roads or footpaths for recreation (51.0 times per year) and water sports (46.0 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 6.3 out of 10. This was followed by visiting landmarks, lookouts and scenery (6.2), walking on roads or footpaths for recreation (6.1), scenic driving with a car or motorbike (5.9), water sports (5.6), bushwalking for less than two hours (5.5), and attending outdoor concerts/music festivals (5.3).

- 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 (58%), walking on roads or footpaths for recreation (55%), water sports (52%), scenic driving with a car or motorbike (51%), and visiting landmarks, lookouts or scenery (51%).

## 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 lack of time (86%), which can be considered to indicate the relative priority of particular activities. However, unmet demand appears to be present, with 30% of survey participants reporting a lack of local opportunities and 14% 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 (37%), visiting Aboriginal & other cultural heritage sites (35%), cycling on a sealed bike path or track (24%), horse riding (23%), and volunteer work for the environment (22%).

## 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 actually none, with 48% of survey participants citing features indicating 'no additional facilities'. The next

most common response was toilets (47%). This was followed by scenery/views (waterfalls) (40%), cleared paths or trails through the bush (unsealed) (40%), rest areas/seats/picnic tables (29%), good road conditions/accessibility (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 and friends' (8.3 out of 10), 'I like to get outdoors for the health benefits, like breathing the fresh air' (8.2) and 'I like to spend time outdoors to get a break from my day-to-day routine' (8.0).
- 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 this<sup>1</sup>. 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.

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<sup>1</sup> 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.



- In percentage terms, when compared to current participation, it was forecasted that horse riding would more than double in 2018 if actionable barriers were addressed, rising 122% compared to current overall participation. Volunteer work for the environment (47%) and visiting Aboriginal and other cultural heritage sites (41%) were also predicted to have large increases.
- 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 running or jogging outdoors, which was forecasted to rise from 8.2 million times per year in 2009 to 12.0 million times per year in 2018. In percentage terms, when compared to current participation, it was forecasted that horse riding (152%), snow sports (58%), attending outdoor concerts/music festivals (56%), visiting Aboriginal and other cultural heritage sites (53%) would increase by at least 50% 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 700,000 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 3.8 million events in 2018, compared to only 0.8 million events under the demographic approach. Similarly, activities such as cycling 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, 86% 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 South Coast area

## RESEARCH FINDINGS

### 4.1 Introduction

This section presents the findings of the quantitative telephone survey for the South Coast area, which will be useful for land managers in the South Coast area and any area that receives significant visitation from South Coast residents. The findings for the remaining five geographic regions (Greater Sydney, North Coast, North Tablelands, 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 the South Coast 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

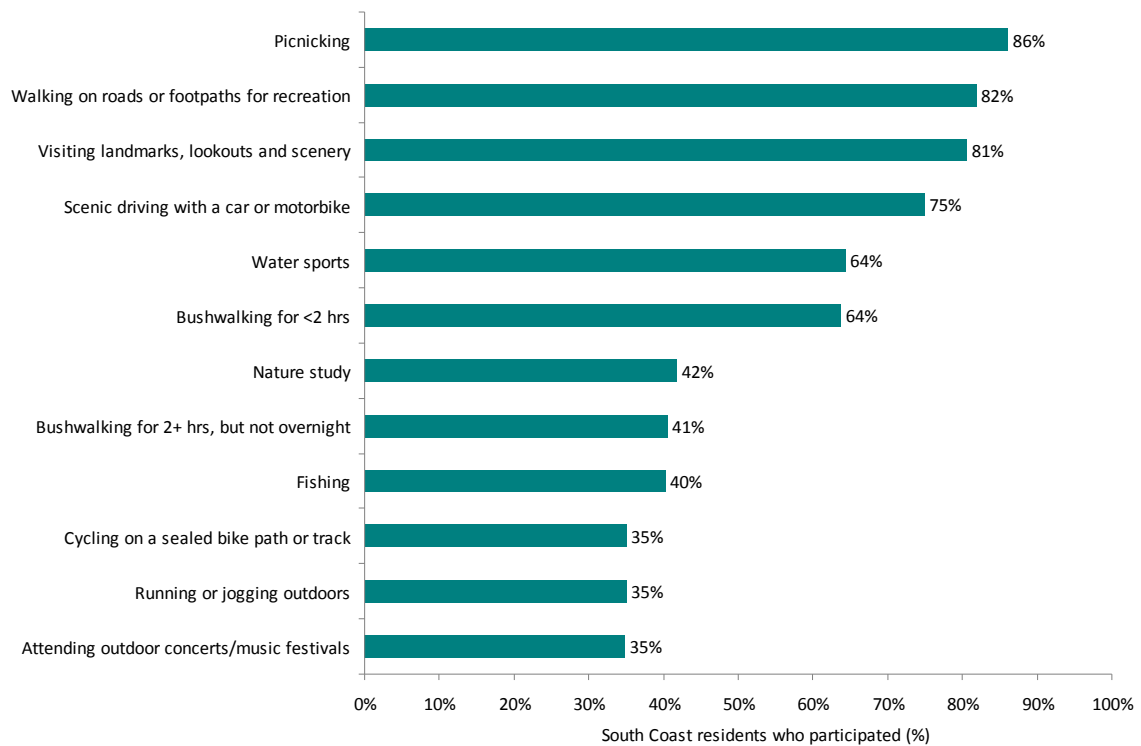
Please note that the names of these activities have been abbreviated in the charts due to space constraints.

## Participation rates

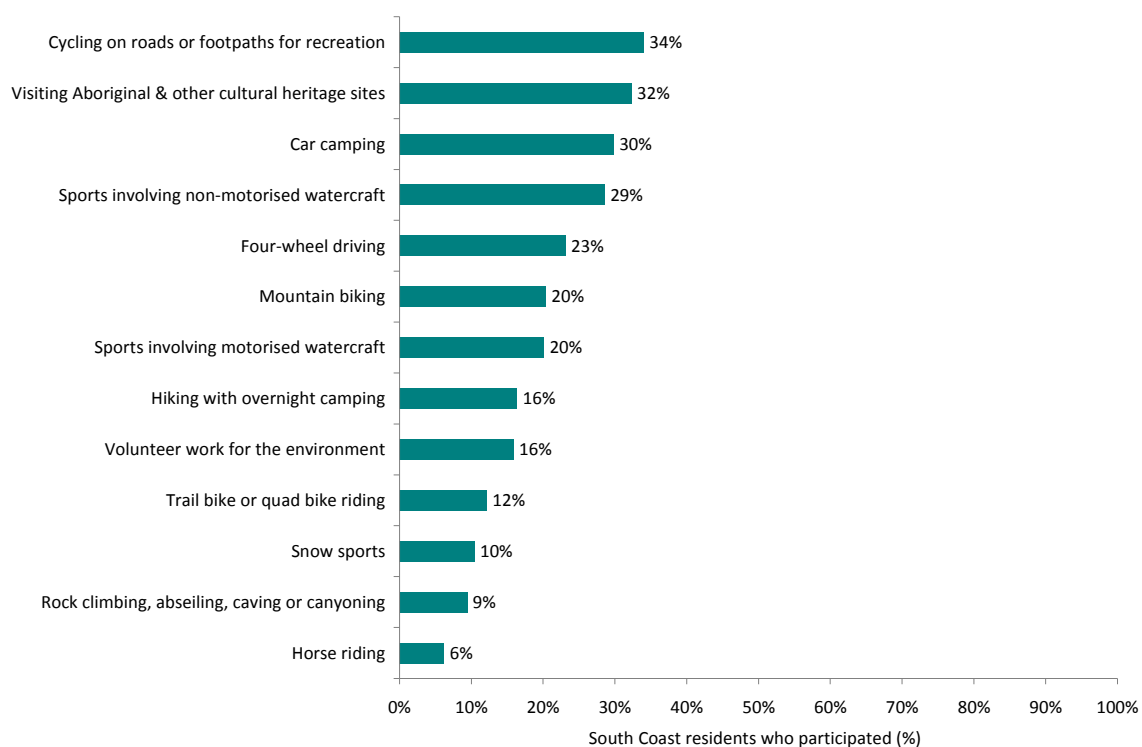
Survey participants who responded zero were considered non-participants in that activity for the purposes of this survey, while those who responded one or more times were considered current participants. In the sample of South Coast residents, 3 (1%) had not participated in any of the activities in the 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 (86%), walking on roads or footpaths for recreation (82%), visiting landmarks, lookouts and scenery (81%), scenic driving with a car or motorbike (75%), and water sports and bushwalking for less than two hours, but not overnight (both 64%).

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                                   | 74%        | 83%   | 79%   | 87%   | 96%    | 100%  | 94%   | 83%        | <b>86%</b> |
| Walking on roads or footpaths for recreation | 65%        | 79%   | 76%   | 76%   | 100%   | 93%   | 89%   | 85%        | <b>82%</b> |
| Visiting landmarks, lookouts and scenery     | 74%        | 75%   | 72%   | 81%   | 85%    | 89%   | 72%   | 85%        | <b>81%</b> |
| Scenic driving with a car or motorbike       | <b>45%</b> | 75%   | 69%   | 79%   | 89%    | 81%   | 83%   | 73%        | <b>75%</b> |
| Water sports                                 | <b>90%</b> | 75%   | 76%   | 58%   | 85%    | 78%   | 72%   | <b>49%</b> | <b>64%</b> |
| Bushwalking for <2 hrs                       | 52%        | 67%   | 55%   | 68%   | 74%    | 56%   | 72%   | 61%        | <b>64%</b> |

As Table 4.2.1 shows, males in the 18-24 age bracket were significantly less likely (45%) to participate in scenic driving with a car or motorbike. By contrast, males aged 18-24 were significantly more likely to participate in water sports (90%) while females in the 45-75 age bracket were significantly less likely to participate in water sports (49%).

### 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. In terms of the South Coast, 43 participants reported extremely frequent participation for one or more activities. Of these 43 participants, 8 confirmed their responses, while 20 revised at least one of their answers. The remaining 15 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



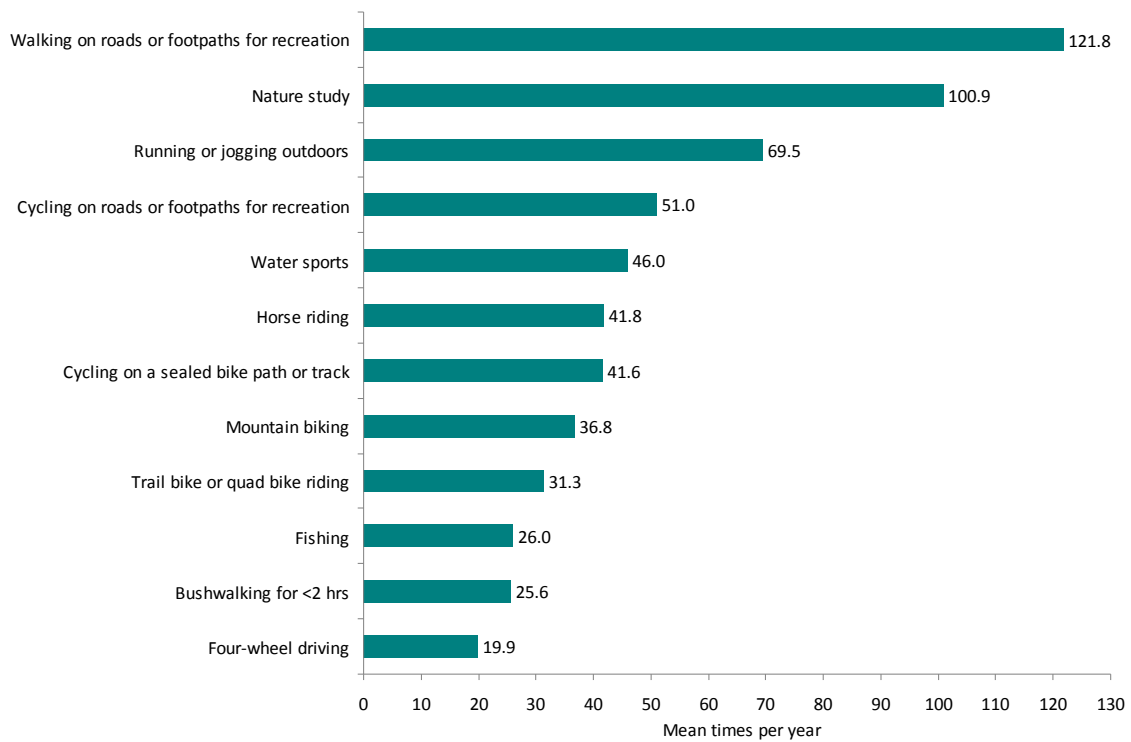
and an examination of the data. Truncation simply entails reducing scores above a cut-off point to that cut-off point. Therefore, all participants who reported, for example, walking on roads or footpaths more than 365 times in the last year had their score reduced to 365. The percentage of participants (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**

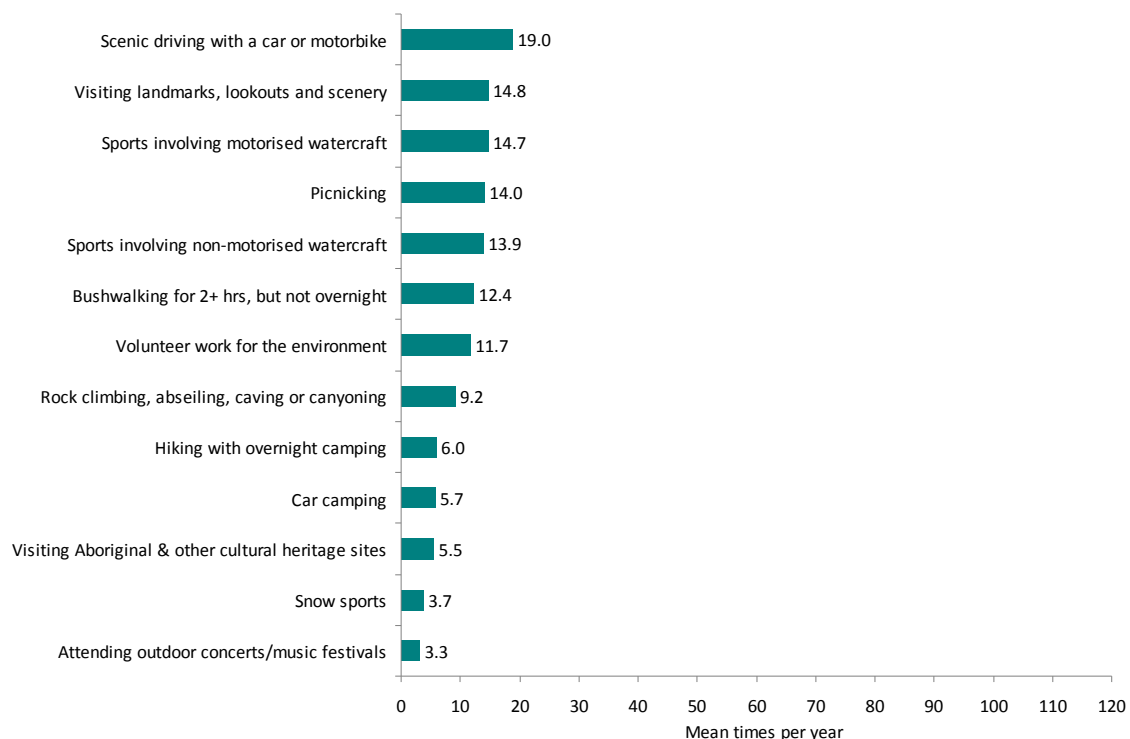
|   | Cut-off | % participants | n |
|---|---------|----------------|---|
| Walking on roads or footpaths for recreation          | >365    | 0.5%           | 2 |
| Bushwalking for <2 hrs                                | >365    | 0.0%           | 0 |
| Bushwalking for 2+ hrs, but not overnight             | >104    | 0.5%           | 2 |
| Hiking with overnight camping                         | >26     | 0.5%           | 2 |
| Running or jogging outdoors                           | >365    | 0.5%           | 2 |
| Cycling on roads or footpaths for recreation          | >365    | 0.0%           | 0 |
| Cycling on a sealed bike path or track                | >365    | 0.2%           | 1 |
| Mountain biking                                       | >365    | 0.0%           | 0 |
| Picnicking  | >104    | 0.2%           | 1 |
| Car camping   | >26     | 0.7%           | 3 |
| Snow sports   | >26     | 0.2%           | 1 |
| Water sports  | >365    | 0.0%           | 0 |
| Sports involving motorised watercraft                 | >104    | 0.5%           | 2 |
| Sports involving non-motorised watercraft             | >104    | 0.7%           | 3 |
| Scenic driving with a car or motorbike                | >104    | 1.5%           | 6 |
| Four-wheel driving                                    | >208    | 0.2%           | 1 |
| Trail bike or quad bike riding                        | >365    | 0.0%           | 0 |
| Rock climbing, abseiling, caving or canyoning         | >52     | 0.0%           | 0 |
| Visiting landmarks, lookouts and scenery              | >104    | 0.2%           | 1 |
| Visiting Aboriginal and other cultural heritage sites | >52     | 0.5%           | 2 |
| Nature study  | >365    | 0.2%           | 1 |
| Volunteer work for the environment                    | >208    | 0.0%           | 0 |
| Attending outdoor concerts/music festivals            | >12     | 0.2%           | 1 |
| Fishing   | >365    | 0.2%           | 1 |
| 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 or footpaths for recreation (121.8 times per year) was the most frequently engaged in activity, followed by nature study (100.9 times per year). The next three most frequently participated in activities were running or jogging outdoors (69.5 times per year), cycling on roads or footpaths for recreation (51.0 times per year) and water sports (46.0 times per year).

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.

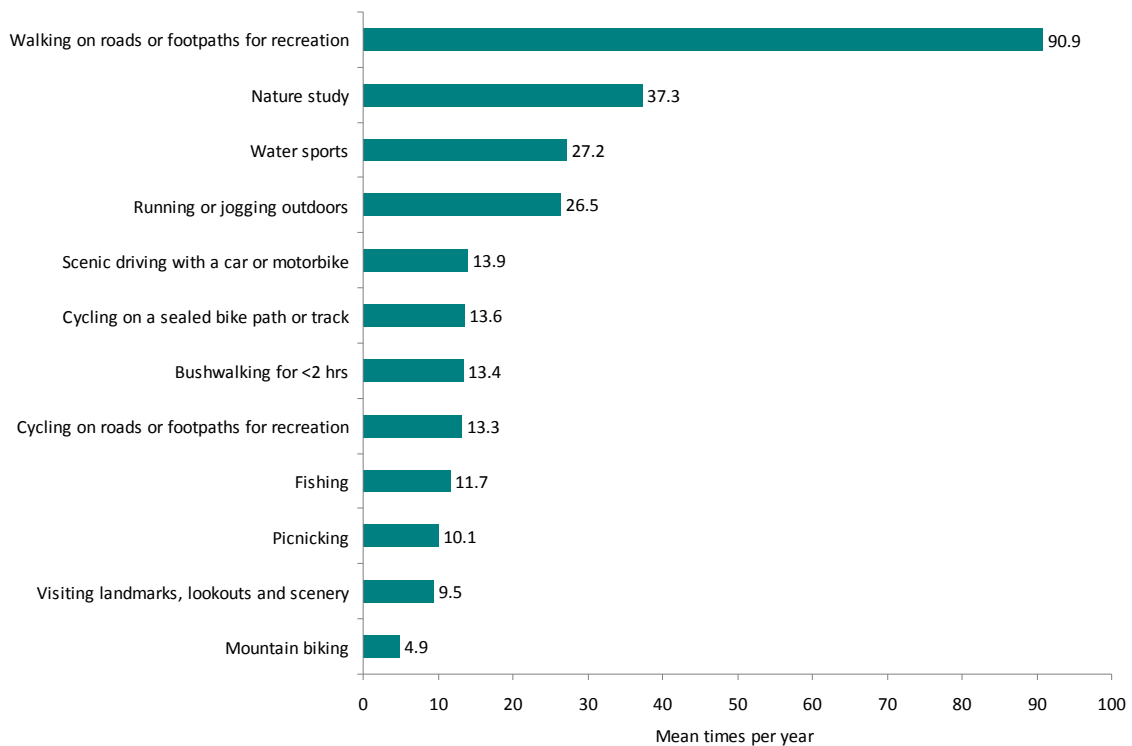
**Table 4.2.3 Frequency of participation in top five outdoor recreation activities by age and gender (participants only)**

|  | 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 | 92    | 81    | 65    | 114   | 132       | 111   | 98    | 127   | <b>111</b> |
| Nature study                                 | 12    | 68    | 42    | 114   | <b>18</b> | 94    | 52    | 112   | <b>89</b>  |
| Running or jogging outdoors                  | 107   | 86    | 44    | 67    | 70        | 71    | 69    | 88    | <b>76</b>  |
| Water sports                                 | 69    | 27    | 43    | 47    | 23        | 47    | 42    | 34    | <b>42</b>  |
| Cycling on roads or footpaths for recreation | 82    | 30    | 52    | 43    | <b>11</b> | 29    | 25    | 31    | <b>39</b>  |

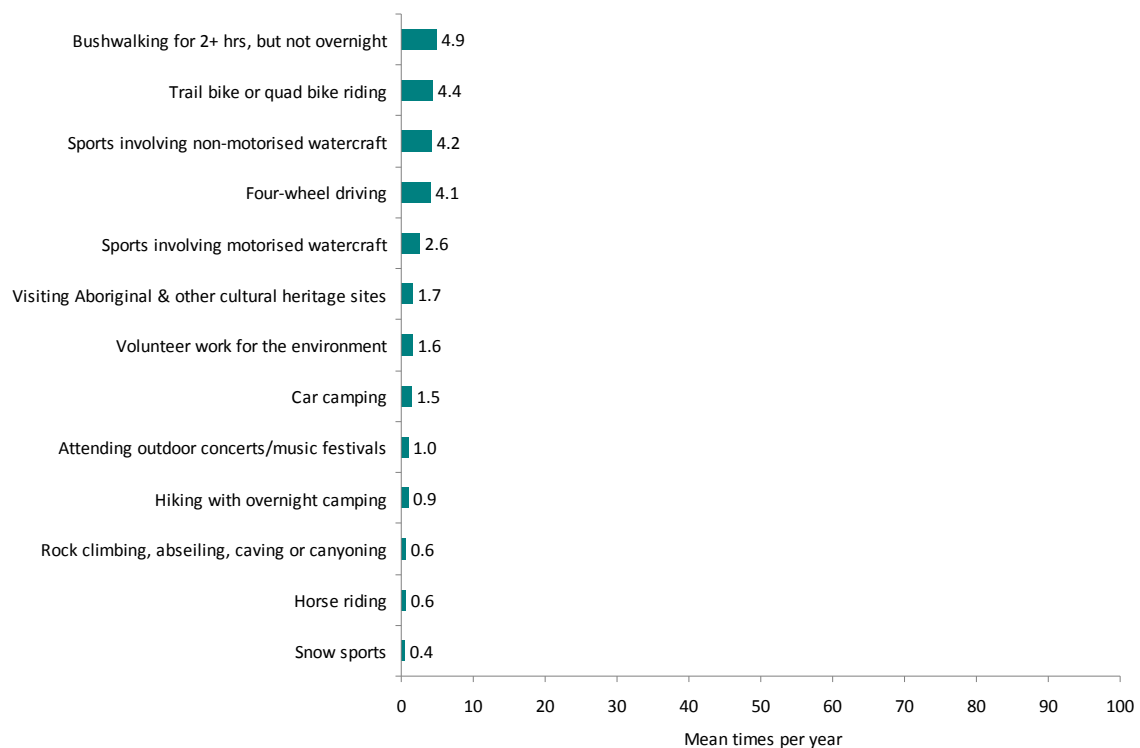
As Table 4.2.3 shows, females in the 18-24 age bracket's mean frequency of participation in nature study was significantly lower (18 times per year), as was their mean frequency of participation in cycling on roads or footpaths for recreation (11 times per year).

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 (90.9 times per year) was by far the most frequently engaged in activity. This was followed by nature study (37.3 times per year), water sports (27.2 times per year), running or jogging outdoors (26.5 times per year), and scenic driving with a car or motorbike (13.9 times per year).

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 | 59       | 64    | 50    | 87    | 132      | 103   | 87    | 108      | <b>91</b> |
| Nature study                                 | <b>2</b> | 20    | 15    | 55    | <b>9</b> | 28    | 22    | 52       | <b>37</b> |
| Water sports                                 | 62       | 20    | 33    | 27    | 19       | 37    | 30    | 17       | <b>27</b> |
| Running or jogging outdoors                  | 80       | 43    | 29    | 15    | 46       | 29    | 29    | 14       | <b>27</b> |
| Scenic driving with a car or motorbike       | 12       | 10    | 14    | 16    | 16       | 16    | 12    | 13       | <b>14</b> |
| Cycling on a sealed bike path or track       | 31       | 42    | 15    | 14    | 6        | 18    | 10    | <b>4</b> | <b>14</b> |

As Table 4.2.4 shows, males in the 18-24 age bracket's mean frequency of participation in nature study was significantly lower (2 times), as were females aged 18-24 (9 times). Females aged 45-75 had a significantly lower mean frequency of participation in cycling on sealed bike paths or tracks (4 times).

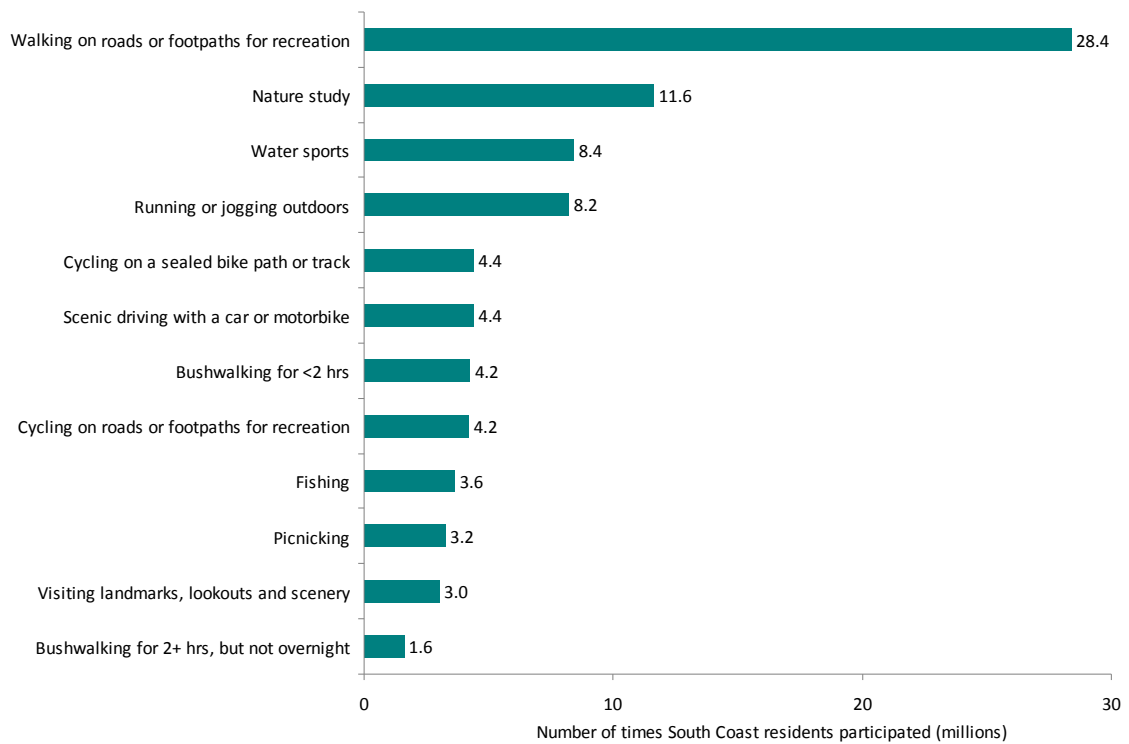
Total participation figures were estimated for each of the outdoor recreation activities for the last 12 months by multiplying, in each age by gender subgroup:

- 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.

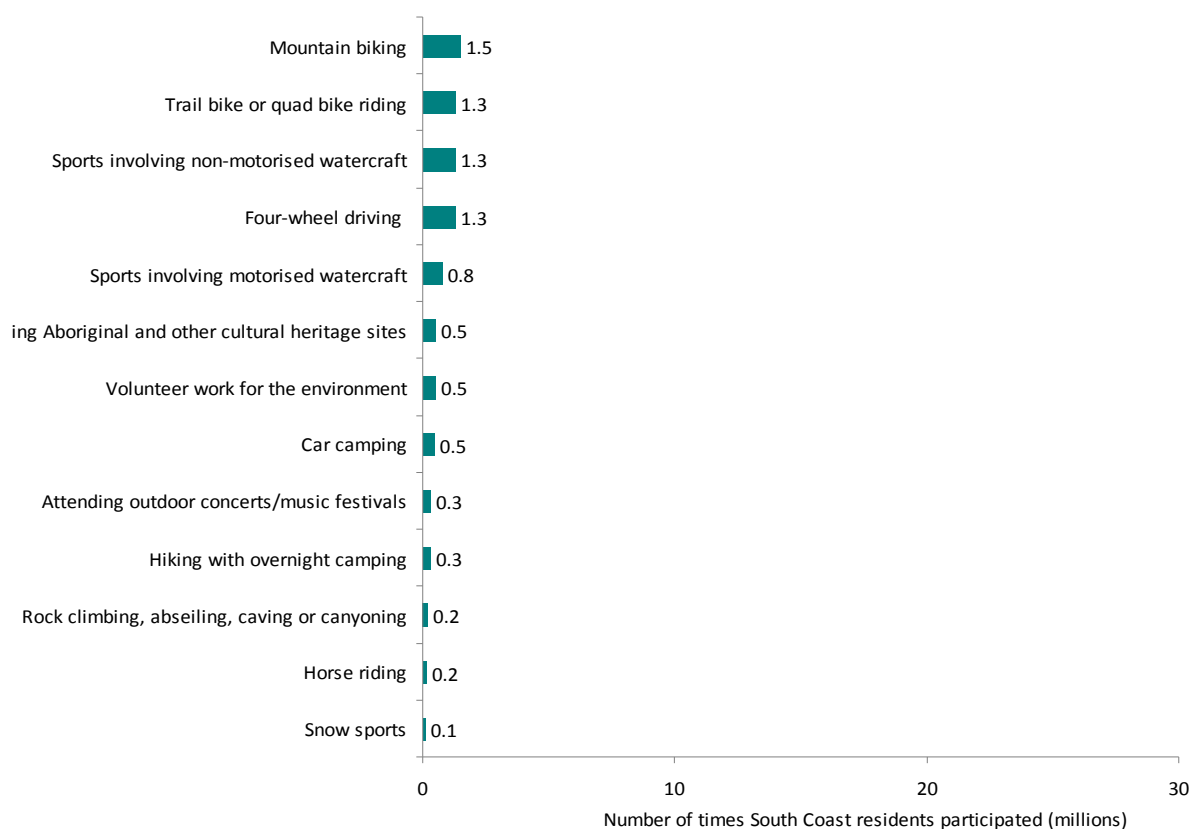
Overall total participation figures for each of the outdoor recreation activities are presented in Figures 4.2.7 and 4.2.8. The 45-75 year old age bracket was split into three 10 year age bands for the calculation of overall total participation displayed in the figures below.



**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 (28.4 million), nature study (11.6 million), water sports (8.4 million), running or jogging outdoors (8.2 million), and cycling on a sealed bike path or track and scenic driving with a car or motorbike (both 4.4 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 | 1.1   | 1.5   | 1.5   | 7.2   | 2.3    | 2.5   | 2.8   | 9.3   | 28.3  |
| Nature study                                 | 0.0   | 0.5   | 0.4   | 4.6   | 0.2    | 0.7   | 0.7   | 4.5   | 11.6  |
| Water sports                                 | 1.2   | 0.5   | 1.0   | 2.2   | 0.3    | 0.9   | 1.0   | 1.4   | 8.5   |
| Running or jogging outdoors                  | 1.5   | 1.0   | 0.9   | 1.2   | 0.8    | 0.7   | 0.9   | 1.2   | 8.3   |
| Cycling on a sealed bike path or track       | 0.6   | 1.0   | 0.4   | 1.1   | 0.1    | 0.4   | 0.3   | 0.4   | 4.4   |
| Scenic driving with a car or motorbike       | 0.2   | 0.2   | 0.4   | 1.3   | 0.3    | 0.4   | 0.4   | 1.1   | 4.4   |

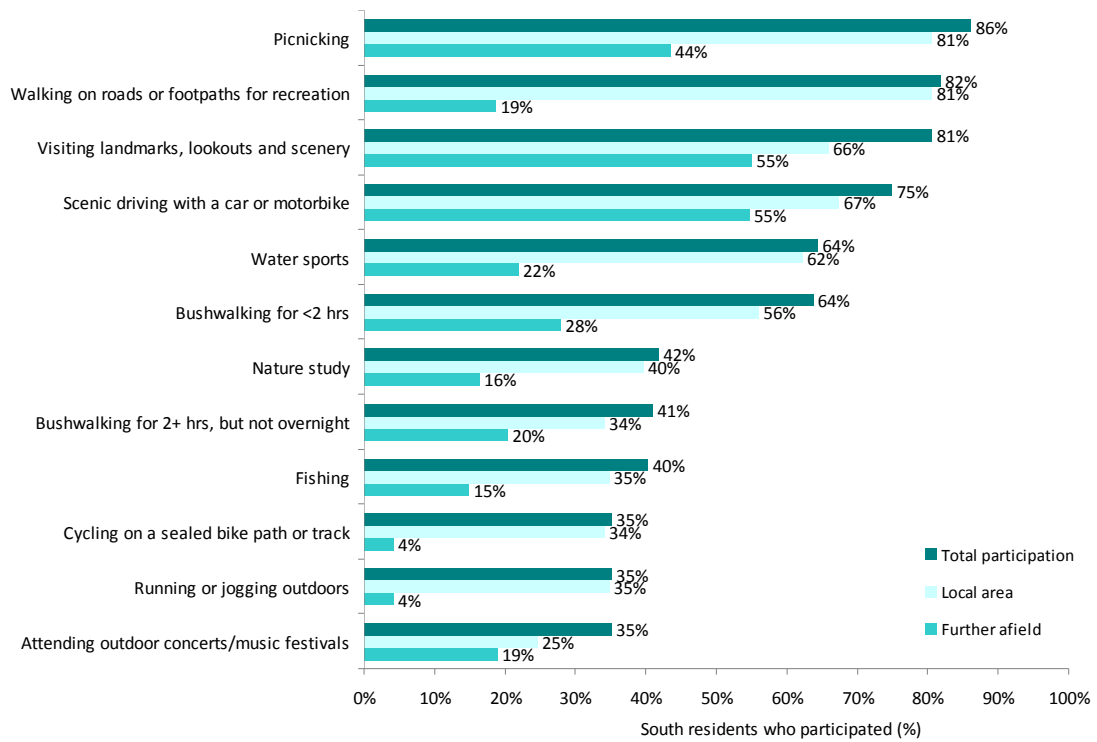
\* No significance testing done for this table

## Location

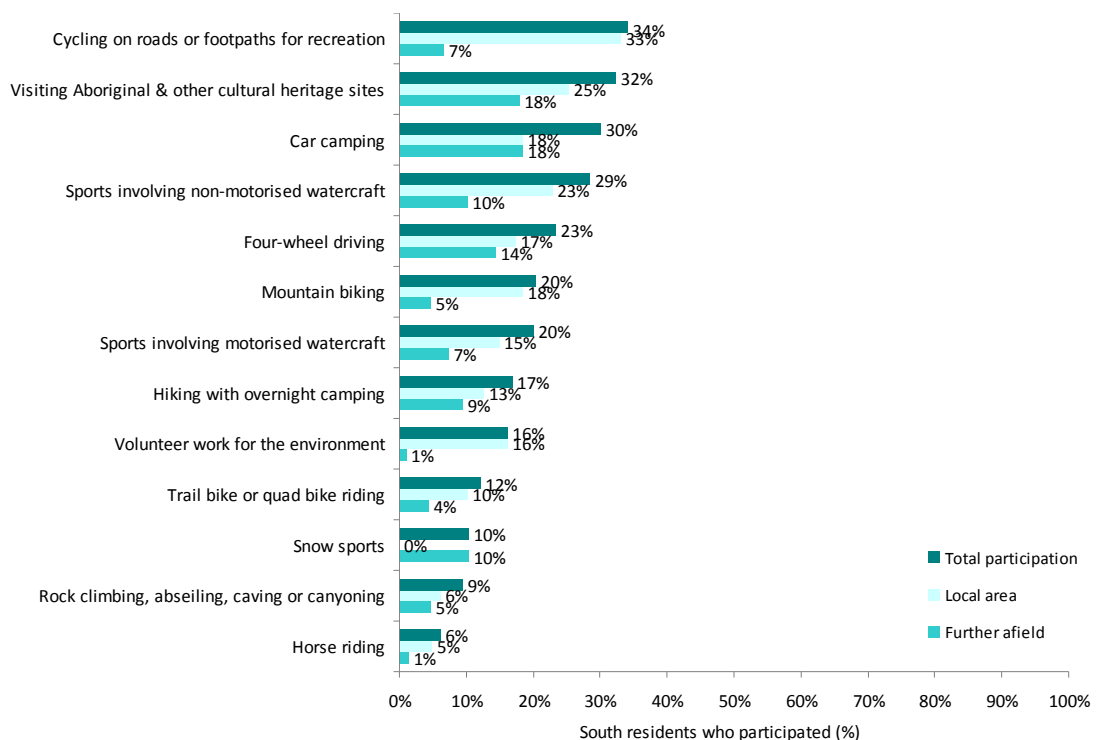
Participants in each activity were asked whether they had participated in their local area, further away, or both.

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**



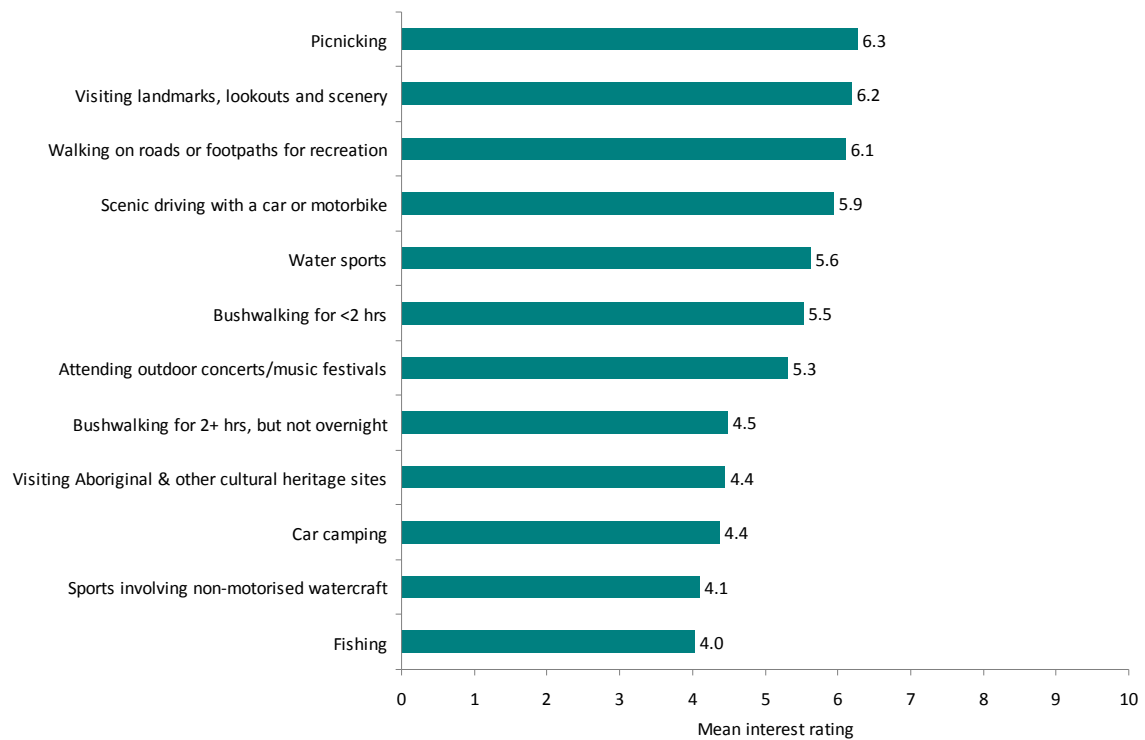
As can be seen from Figures 4.2.9 and 4.2.10, while more people reported having participated in the activities in their local area, there was a sizeable proportion of people who reported participation further afield.

### 4.3 Interest

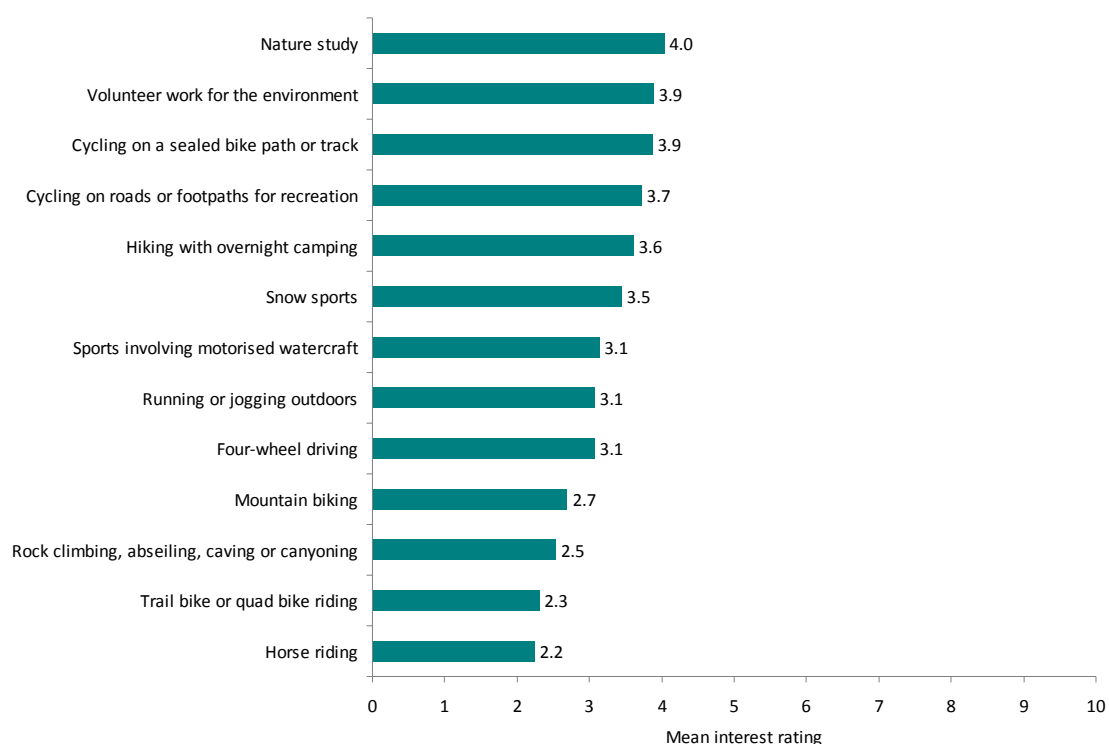
Both participants and non-participants in each of the outdoor recreation activities were asked to indicate how interested they would be in doing in each of the activities more often, if there was nothing stopping them from doing so. They were directed to use a scale of 0 to 10, where 0 was not at all 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 6.3 out of 10. This was followed by visiting landmarks, lookouts and scenery (6.2), walking on roads or footpaths for recreation (6.1), scenic driving with a car or motorbike (5.9), water sports (5.6), bushwalking for less than two hours (5.5), and attending outdoor concerts/music festivals (5.3). The activity with the lowest mean interest rating was horse riding, with a rating of 2.2, 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                                   | 5.0   | 5.6   | 6.0   | 6.3   | 7.5    | 8.0   | 6.9   | 6.0   | 6.3   |
| Visiting landmarks, lookouts and scenery     | 4.9   | 5.8   | 6.4   | 6.1   | 6.0    | 6.8   | 6.3   | 6.5   | 6.2   |
| Walking on roads or footpaths for recreation | 4.6   | 6.7   | 5.9   | 5.6   | 6.6    | 7.3   | 7.0   | 6.3   | 6.1   |
| Scenic driving with a car or motorbike       | 5.1   | 5.3   | 6.4   | 6.2   | 6.3    | 5.4   | 6.2   | 5.9   | 5.9   |
| Water sports                                 | 7.8   | 6.3   | 7.0   | 5.2   | 7.0    | 6.4   | 6.4   | 4.2   | 5.6   |

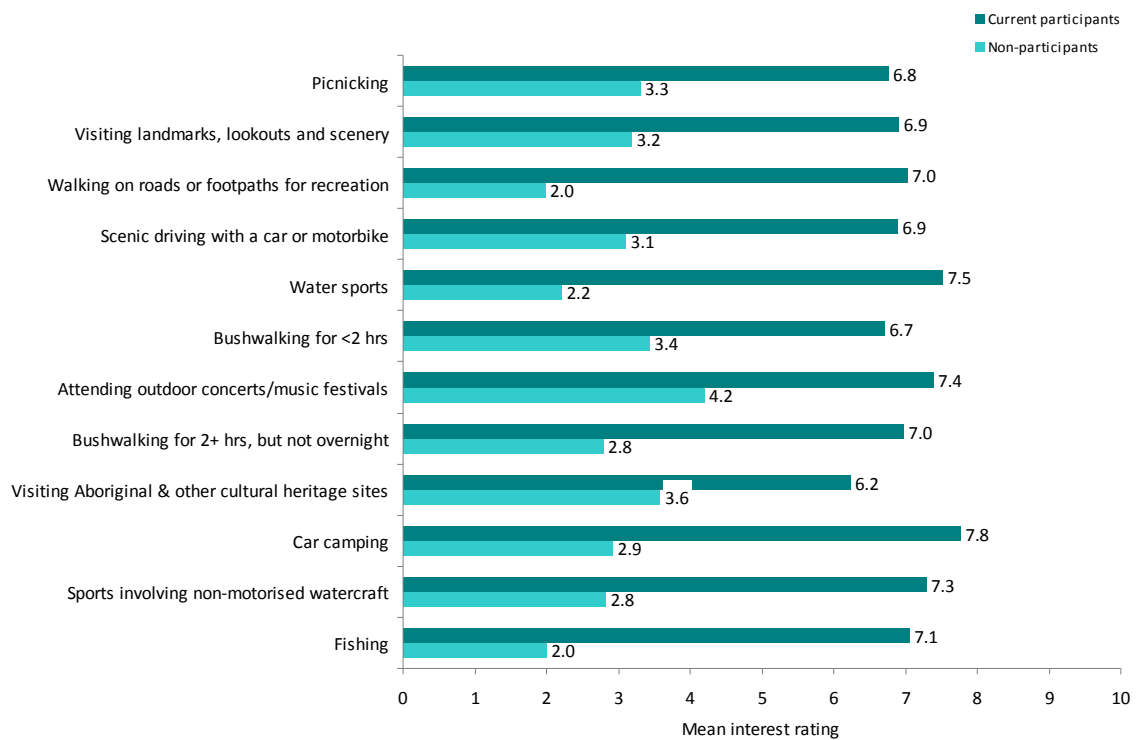
As Table 4.3.1 shows, interest in more frequent participation in picnicking was significantly higher among females aged 18-24 (7.5) and 25-34 (8.0). In addition, interest in more frequent participation in visiting landmarks, lookouts and scenery was significantly lower among males aged 18-24 (4.9).

Males in the 18-24 age bracket reported significantly higher interest in more frequent participation in water sports, (7.8), as did females aged 18-24 (7.0), while females aged 45-75 cohort reported significantly lower interest (4.2).

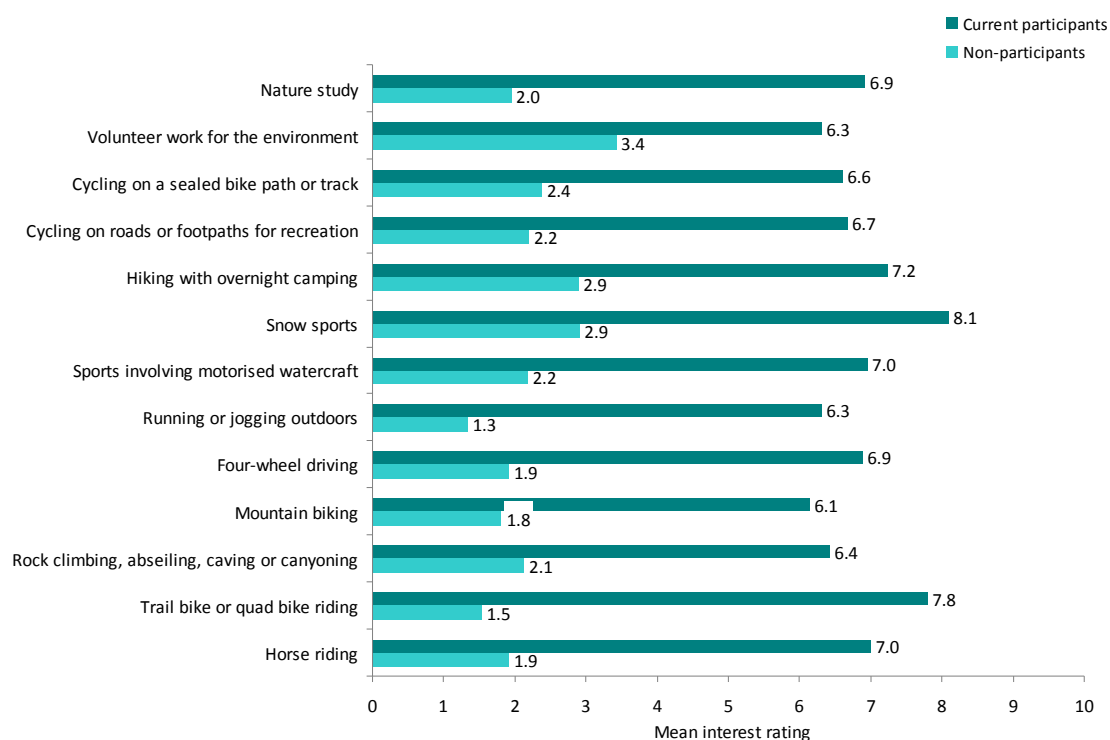
Mean interest ratings in participating more often in each of the outdoor recreation activities were greater for current participants than non-participants, as can be seen in Figures 4.3.3 and 4.3.4.



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



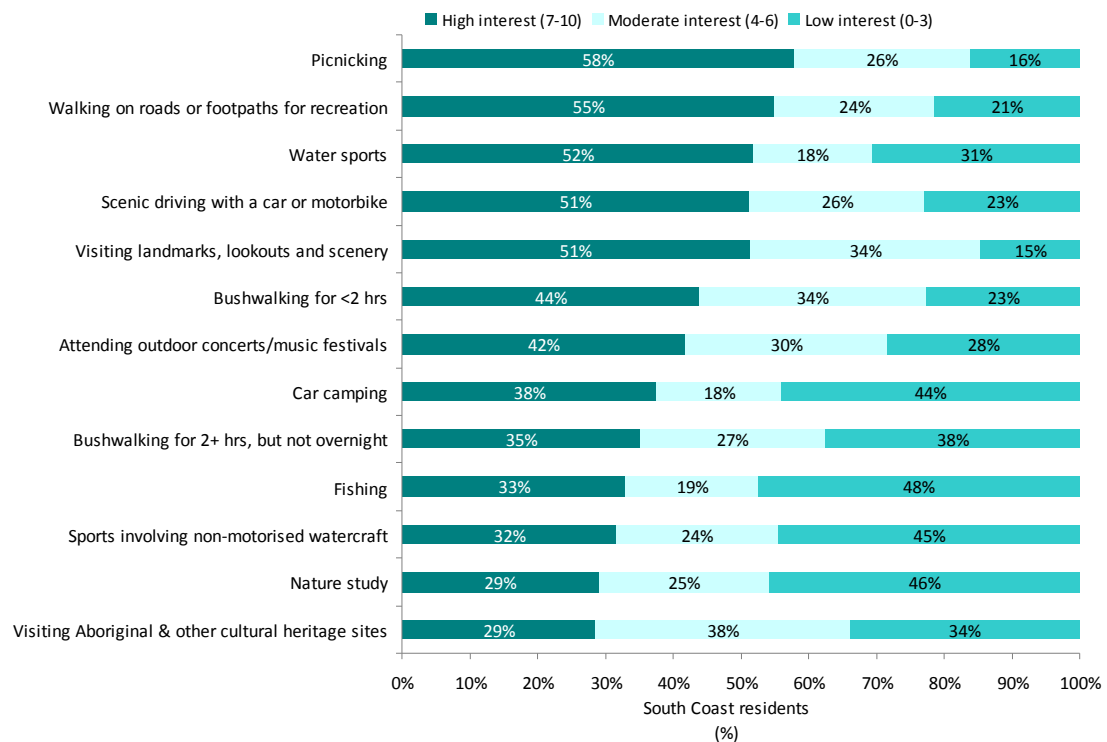
**Figure 4.3.4 Interest in more frequent participation in outdoor recreation activities by participation status – Part II**



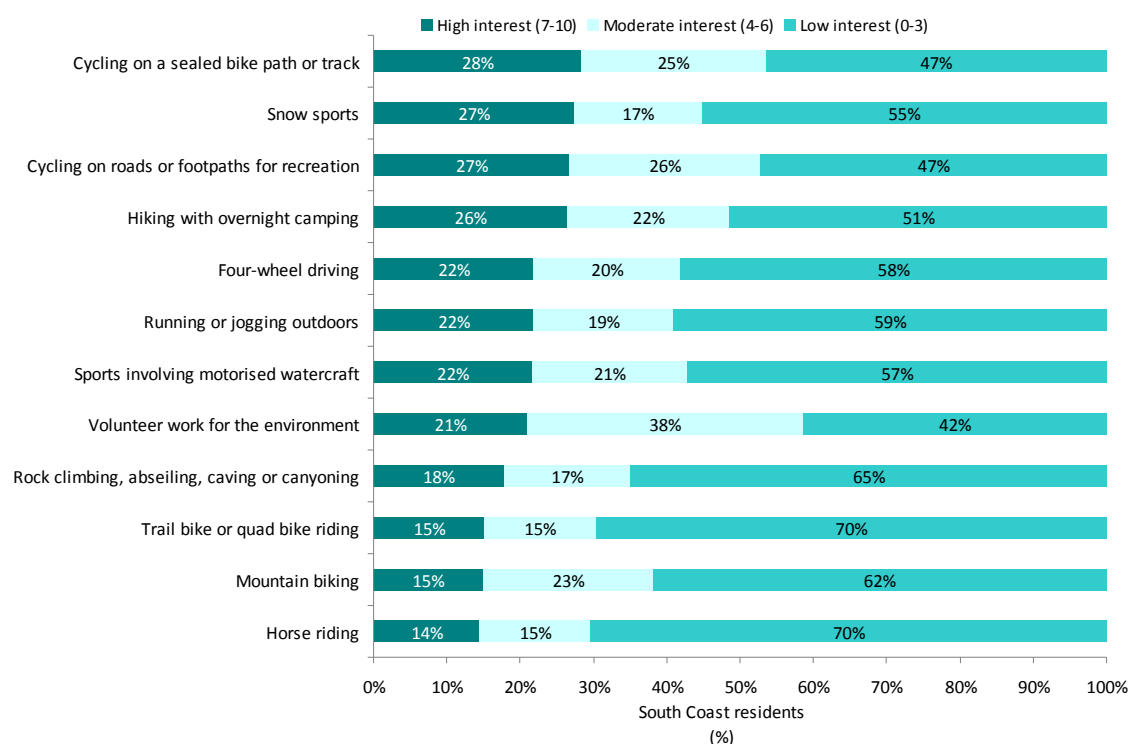
As Figure 4.3.3 shows, the highest difference in interest ratings between participants and non-participants is for trail bike or quad bike riding (7.8 for participants, 1.5 for non-participants). The activities with the highest mean ratings among non-participants were attending outdoor concerts and music festivals (4.2) and visiting Aboriginal and other cultural heritage sites (3.6). The activities with the highest mean ratings among participants were snow sports (8.1) and car camping, and trail bike or quad bike riding (which both scored 7.8). The lowest mean interest ratings among non-participants were for running or jogging outdoors (1.3) and trail bike or quad bike riding (1.5), 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**



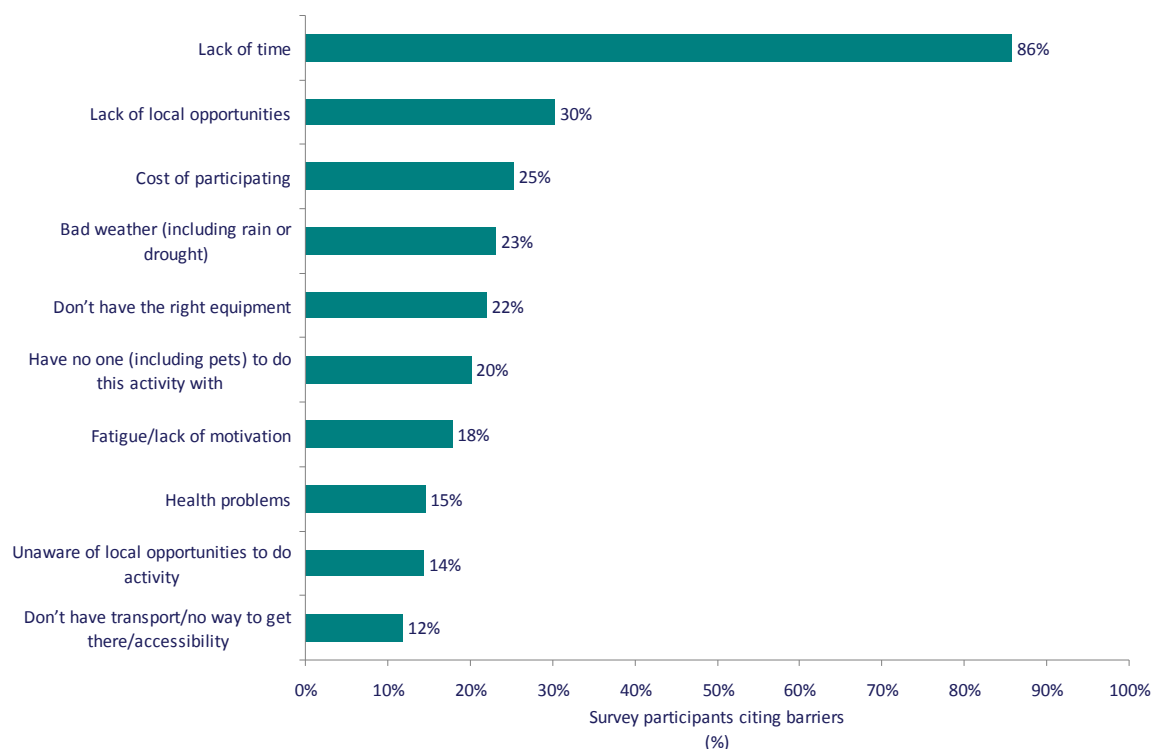
As can be seen in Figures 4.3.5 and 4.3.6, the top five activities based on proportion of survey participants indicating high interest in participating in an activity more often were similar to those based on mean interest ratings. These were picnicking (58%), walking on roads or footpaths for recreation (55%), water sports (52%), scenic driving with a car or motorbike (51%), and visiting landmarks, lookouts and scenery (51%).

## 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.

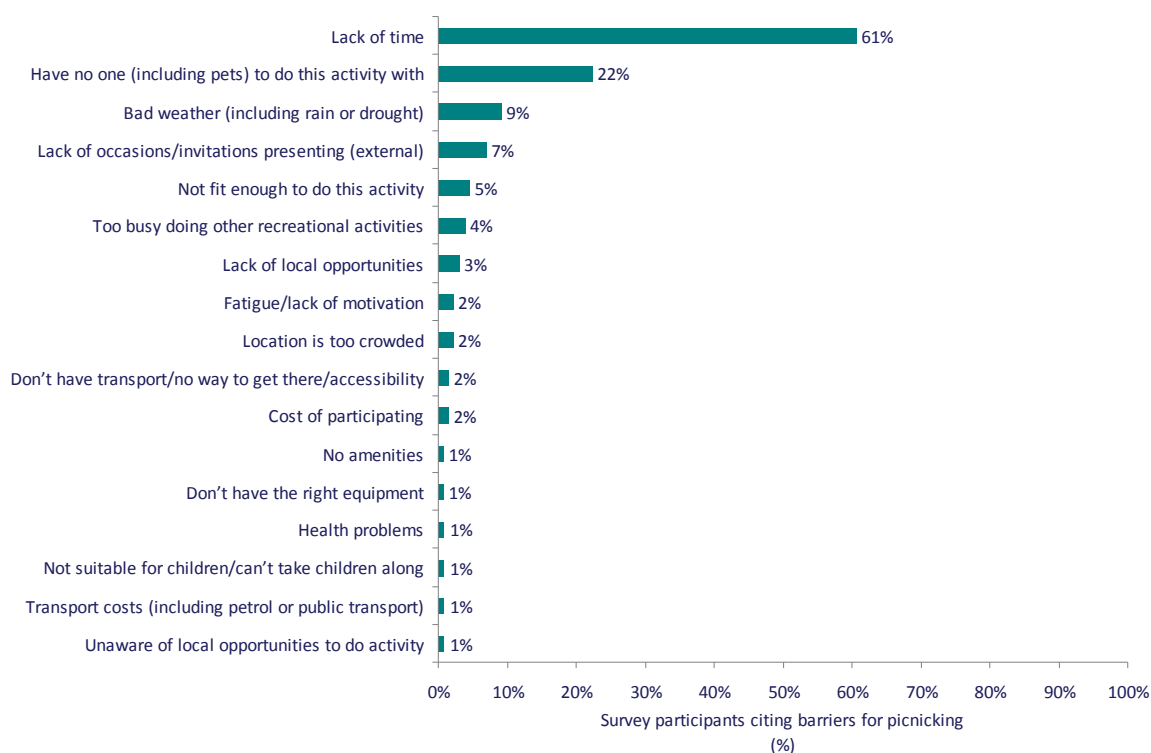
**Figure 4.4.1 Barriers to more frequent participation in outdoor recreation averaged over activities**



The most frequently mentioned barrier across all activities was time (86%), which can be considered to indicate the relative priority of particular activities. However, unmet demand appears to be present, with 30% reporting a lack of local opportunities and 14% reporting a lack of awareness of any 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**

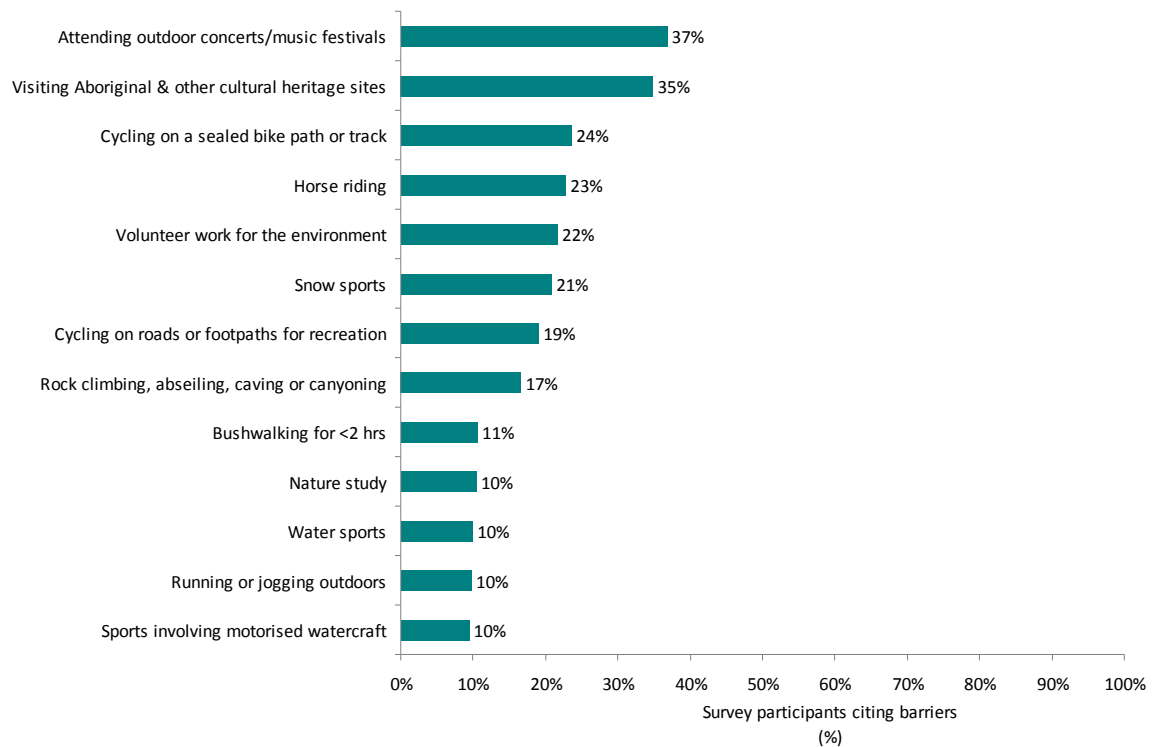


Lack of time (61%) was the most frequently mentioned barrier for picnicking. This was followed by having no one (including pets) to do this activity with (22%), bad weather (including rain or drought) (9%), and lack of occasions/invitations presenting (external) (7%).

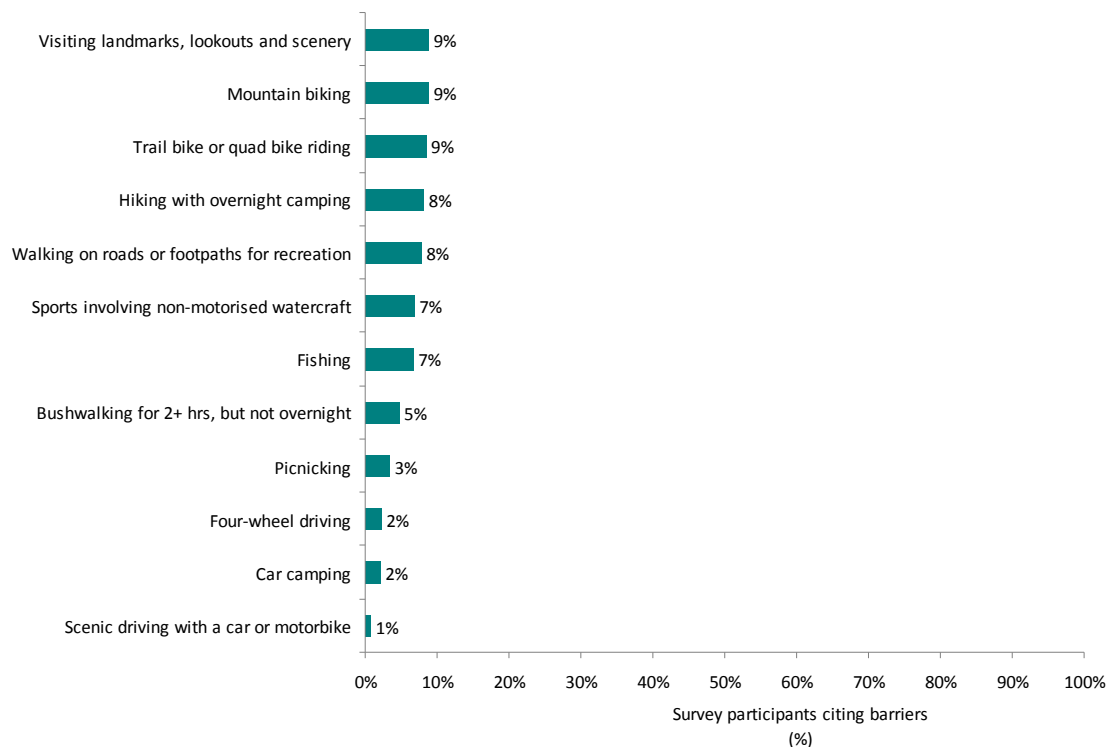
### Actionable barriers

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 37% citing at least one actionable barrier. Visiting Aboriginal & other cultural heritage sites (35%) also had over one quarter citing an actionable barrier.

The activities with the least proportion naming actionable barriers were scenic driving with a car or motorbike (1%), car camping (2%), four-wheel driving (2%) and picnicking (3%), as shown in Figure 4.4.4.

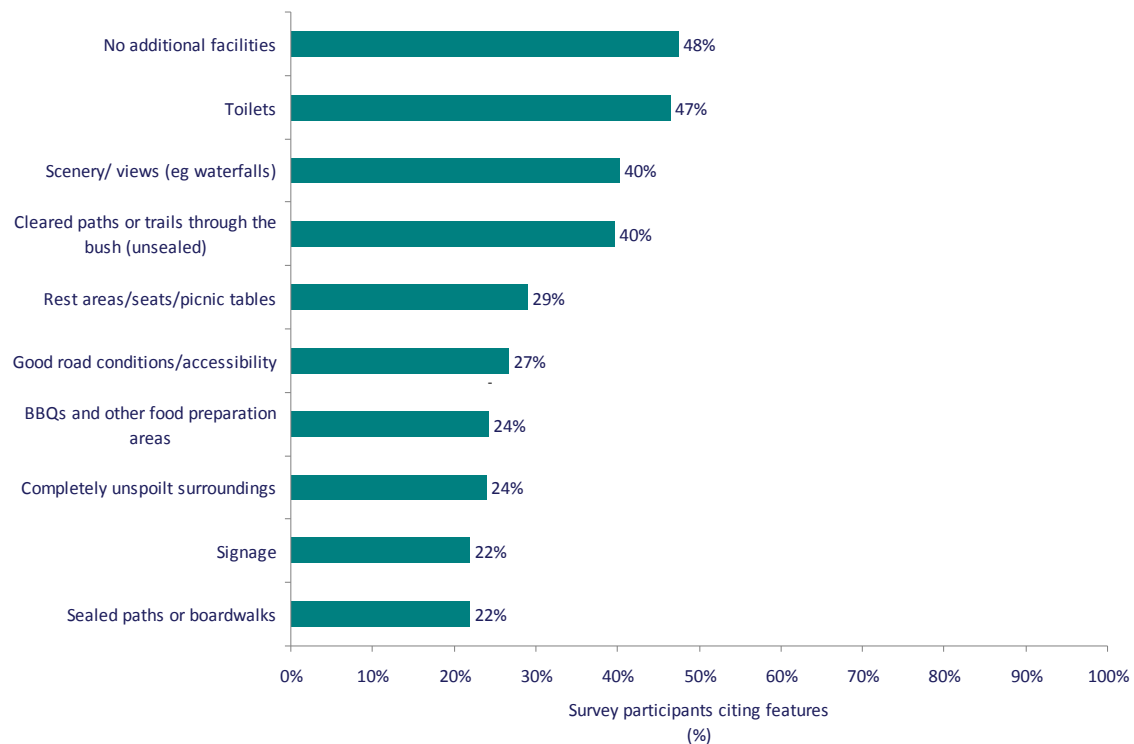
## 4.5 Preferences

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).



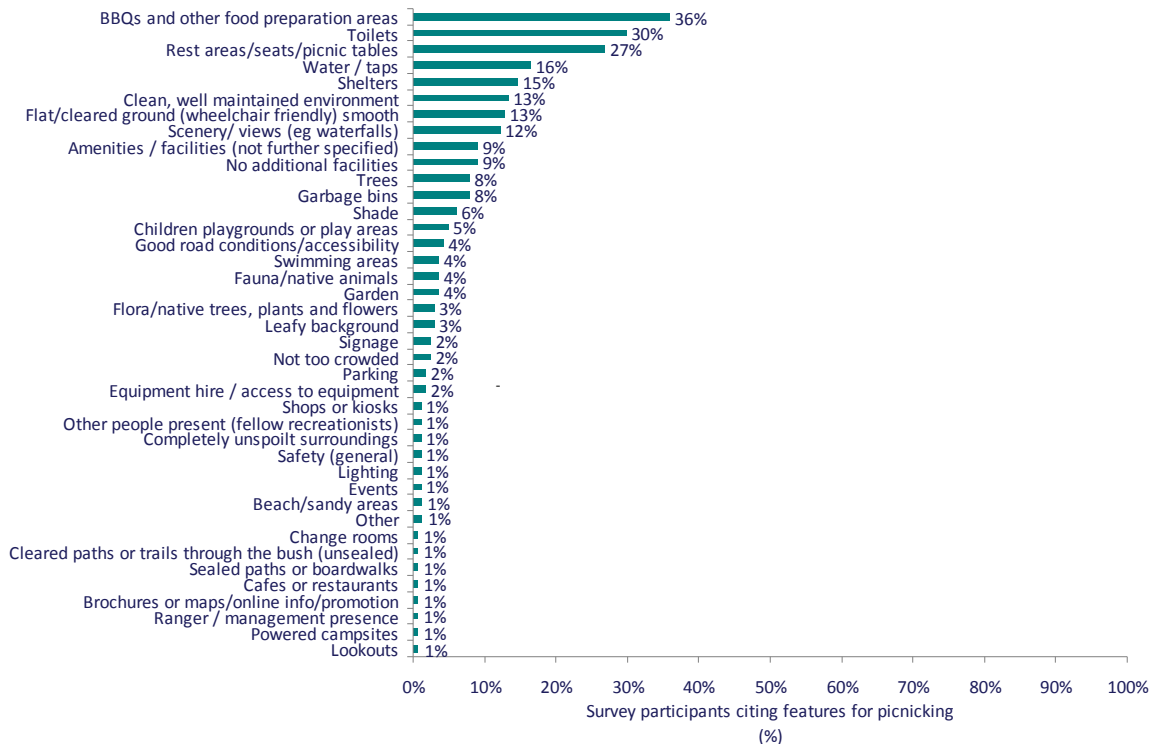
**Figure 4.5.1 Top 10 preferences for participation in outdoor recreation averaged over activities**



The most frequent response across all activities was no additional facilities (48%). The next most common response, and for an actual facility, was for toilets (47%). This was followed by scenery/views (e.g. waterfalls) (40%), cleared paths or trails through the bush (unsealed) (40%), and rest areas/seats/picnic tables (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**



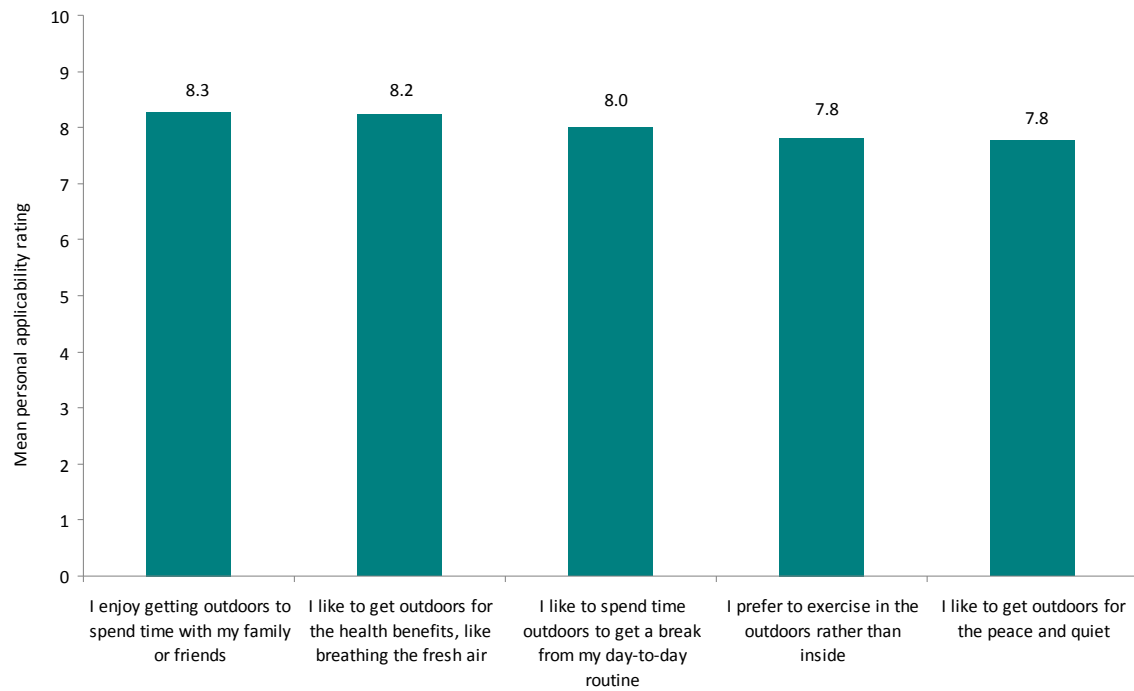
BBQs and other food preparation areas (36%) were the most requested preference for picnicking, followed by toilets (30%), rest areas/seats/picnic tables (27%), water/taps (16%) and shelters (15%).

## 4.6 Motivations

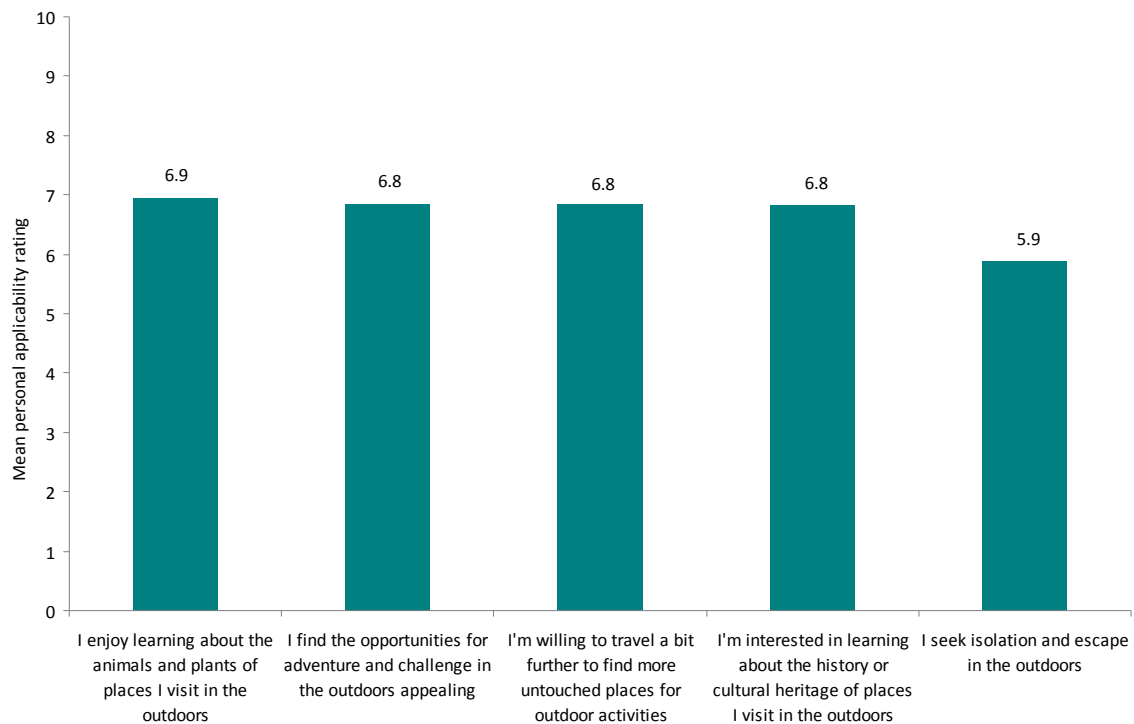
Lastly, survey participants were asked to indicate the extent to which a list of statements describing motivations to participate in outdoor recreation applied to them, on a scale of 0 to 10, where 0 was not at all and 10 was extremely.

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' (8.2) and 'I like to spend time outdoors to get a break from my day-to-day routine' (8.0).

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                                    | 7.8        | 8.0   | 8.8   | 8.2        | 8.1    | 8.8   | 8.8   | 8.1        | <b>8.3</b> |
| I like to get outdoors for the health benefits, like breathing the fresh air                        | 7.5        | 7.2   | 8.0   | 8.5        | 8.2    | 8.1   | 8.5   | 8.4        | <b>8.2</b> |
| I like to spend time outdoors to get a break from my day-to-day routine                             | 7.5        | 7.8   | 7.7   | 8.1        | 8.2    | 8.6   | 8.3   | 7.9        | <b>8.0</b> |
| I prefer to exercise in the outdoors rather than inside   | 8.1        | 7.2   | 7.6   | <b>8.5</b> | 8.0    | 8.5   | 7.5   | <b>7.1</b> | <b>7.8</b> |
| I like to get outdoors for the peace and quiet  | <b>6.5</b> | 7.8   | 7.6   | 8.2        | 7.6    | 7.7   | 7.9   | 7.8        | <b>7.8</b> |
| I enjoy learning about the animals and plants of places I visit in the outdoors                     | <b>4.7</b> | 6.4   | 6.6   | <b>7.5</b> | 6.9    | 6.9   | 6.8   | 7.3        | <b>7.0</b> |
| I'm willing to travel a bit further to find more untouched places for outdoor activities            | 5.7        | 7.4   | 7.9   | 7.1        | 7.7    | 6.8   | 6.6   | 6.5        | <b>6.8</b> |
| I find the opportunities for adventure and challenge in the outdoors appealing                      | 6.8        | 7.2   | 7.9   | 7.3        | 7.7    | 6.2   | 6.8   | <b>6.0</b> | <b>6.8</b> |
| I'm interested in learning about the history or cultural heritage of places I visit in the outdoors | <b>5.3</b> | 6.4   | 6.6   | 7.0        | 6.9    | 6.7   | 7.3   | 7.1        | <b>6.8</b> |
| I seek isolation and escape in the outdoors   | 5.2        | 6.1   | 6.4   | 6.3        | 5.7    | 4.6   | 6.3   | 5.6        | <b>5.9</b> |

Among age and gender groups, it was found that males in the 45-75 age group had a significantly higher mean rating of the motivation 'I prefer to exercise in the outdoors rather than inside' (8.5), whereas females aged 45-75 had a significantly lower mean rating of this motivation (7.1).

It was also found that males aged 18-24 had a significantly lower mean on the following motivations: 'I like to get outdoors for the peace and quiet' (6.5), 'I enjoy learning about the animals and plants of places I visit in the outdoors' (4.7), and 'I'm interested in learning about the history or cultural heritage of places I visit in the outdoors' (5.3).

Finally, males aged 45-75 had a significantly higher mean rating of the motivation 'I enjoy learning about the animals and plants of places I visit in the outdoors' (7.5), while females 45-75 had a significantly lower mean rating of the motivation 'I find the opportunities for adventure and challenge in the outdoors appealing' (6.0).

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 Statistics<sup>2</sup>. 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).

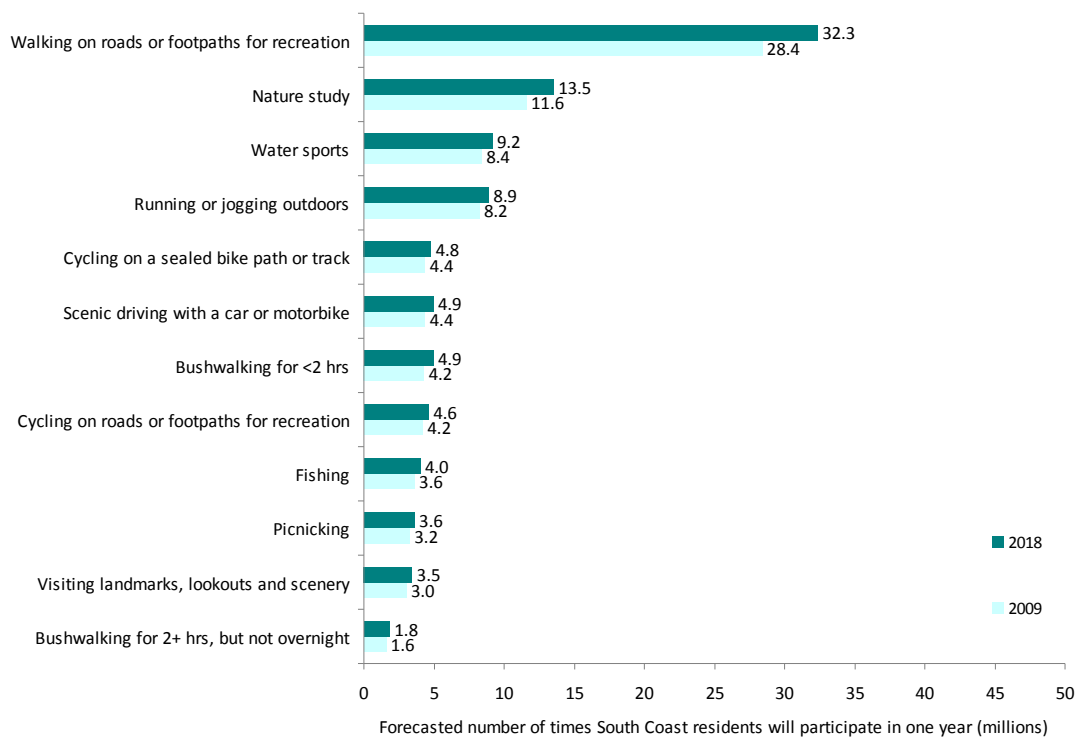
In contrast, a cohort approach assumes that interests are carried by individuals across age groups (e.g. a constant proportion of “2009’s 30 year old males” will continue to be interested in bike riding, even as they age). It can be seen that both approaches rest upon assumptions that may, in time, prove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

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.

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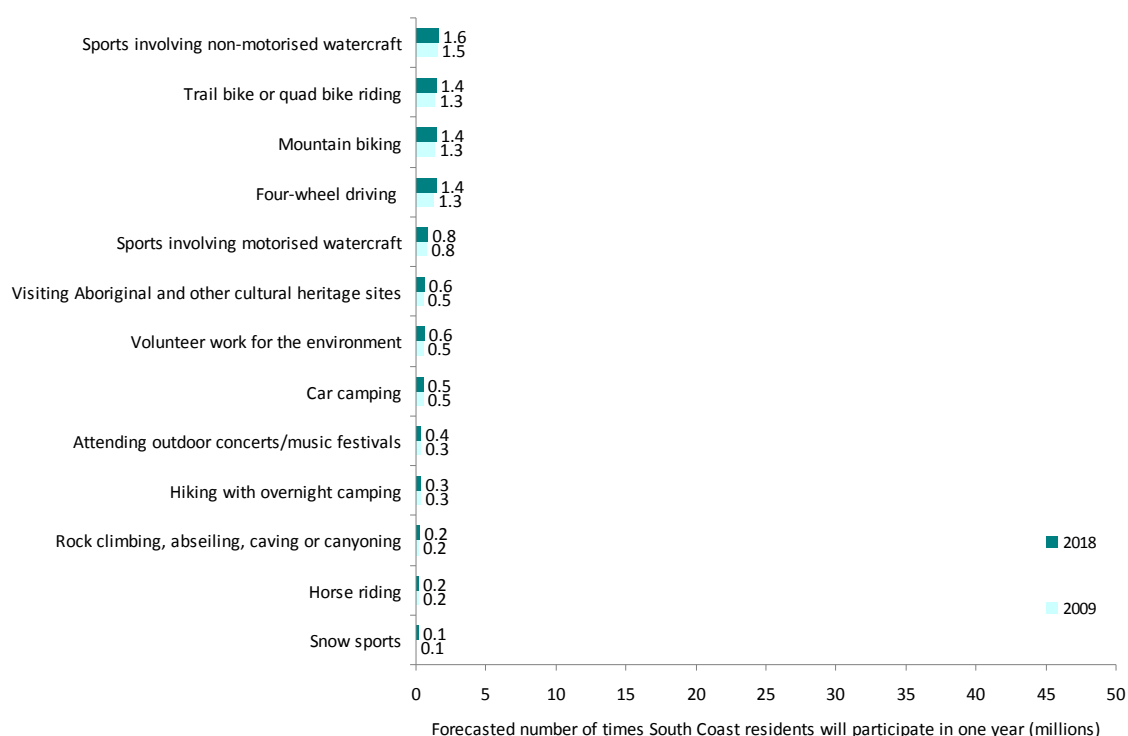
<sup>2</sup> Based on Australian Bureau of Statistics 3222.0 Population Projections, Australia, TABLE B1. Population projections, By age and sex, New South Wales - Series B. Series B largely reflects current trends in fertility, life expectancy at birth, net overseas migration and net interstate migration.

**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.

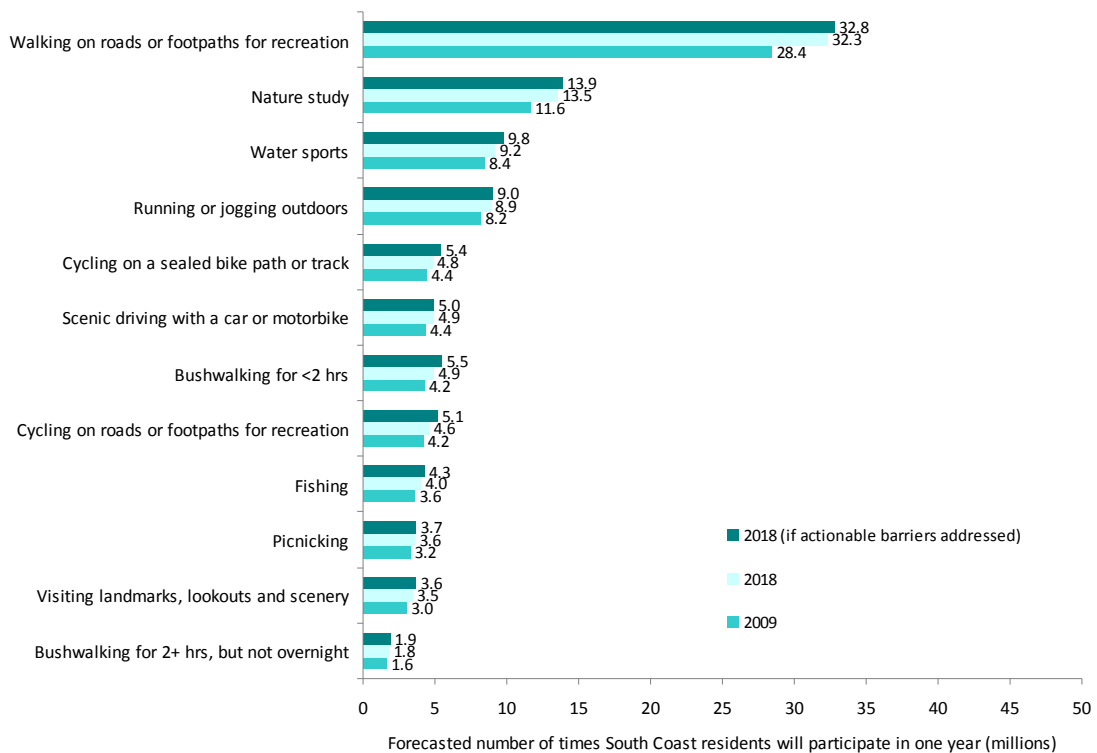
#### **Scenario 2: Actionable barriers are addressed and both participation and frequency increase**

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.

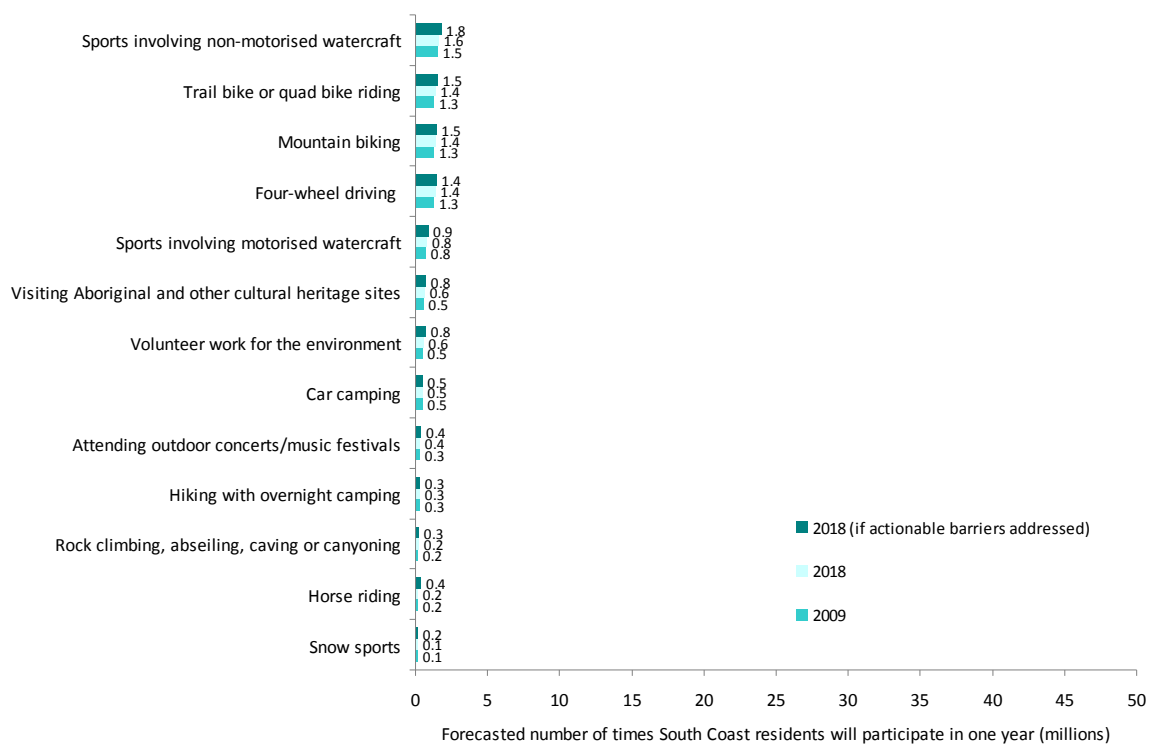
Estimated total participation figures for 2018, assuming PWG was to provide new opportunities and market the range of opportunities for the activity in the local area, and estimating impacts

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**



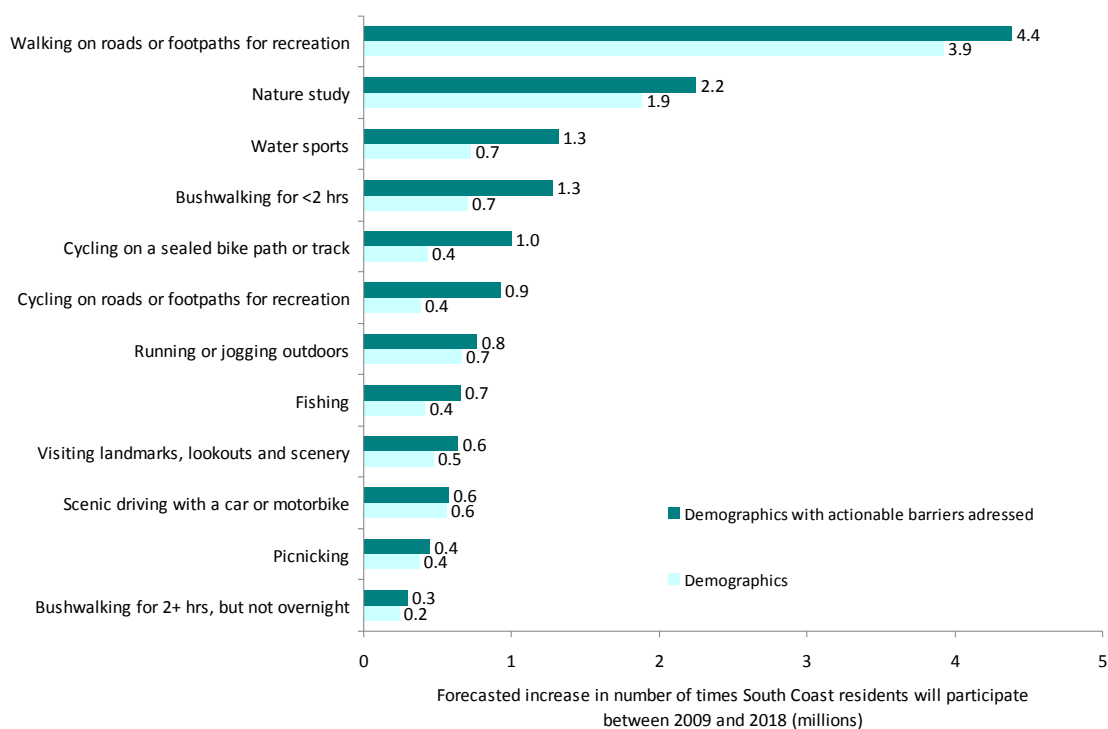
**Figure 4.7.4 Total current and predicted future participation in outdoor recreation activities, including if actionable barriers are addressed, and adjusting for frequency – Part II**



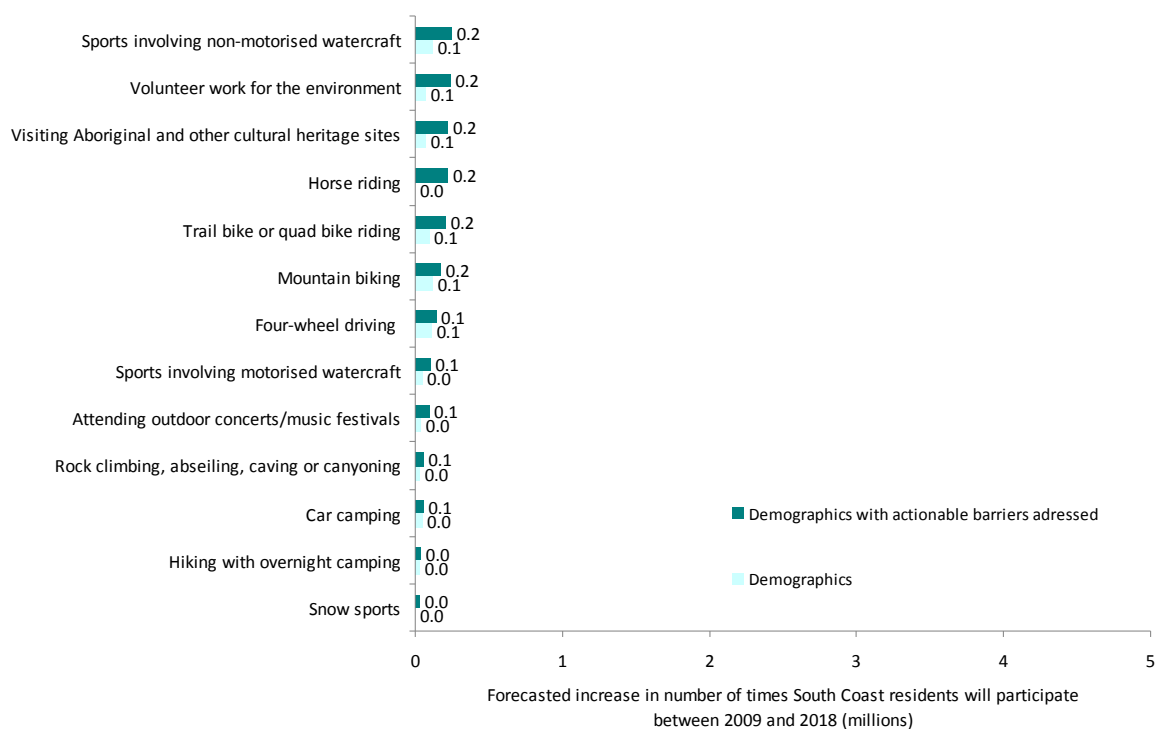
As can be seen, this modelling approach leads to greater changes in predicted participation. The highest increases in future annual participation when actionable barriers are addressed are for cycling on a sealed bike path or track, rising from a predicted 4.8 million events in 2018 to 5.4 million events if actionable barriers are addressed, and for bushwalking less than two hours, rising from a predicted 4.9 million events in 2018 to 5.5 million events if actionable barriers are addressed (an increase of 0.6 million events). The smallest increase in future annual participation was for car camping, four-wheel driving, attending outdoor concerts and music festivals, and hiking with overnight camping, which was 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**

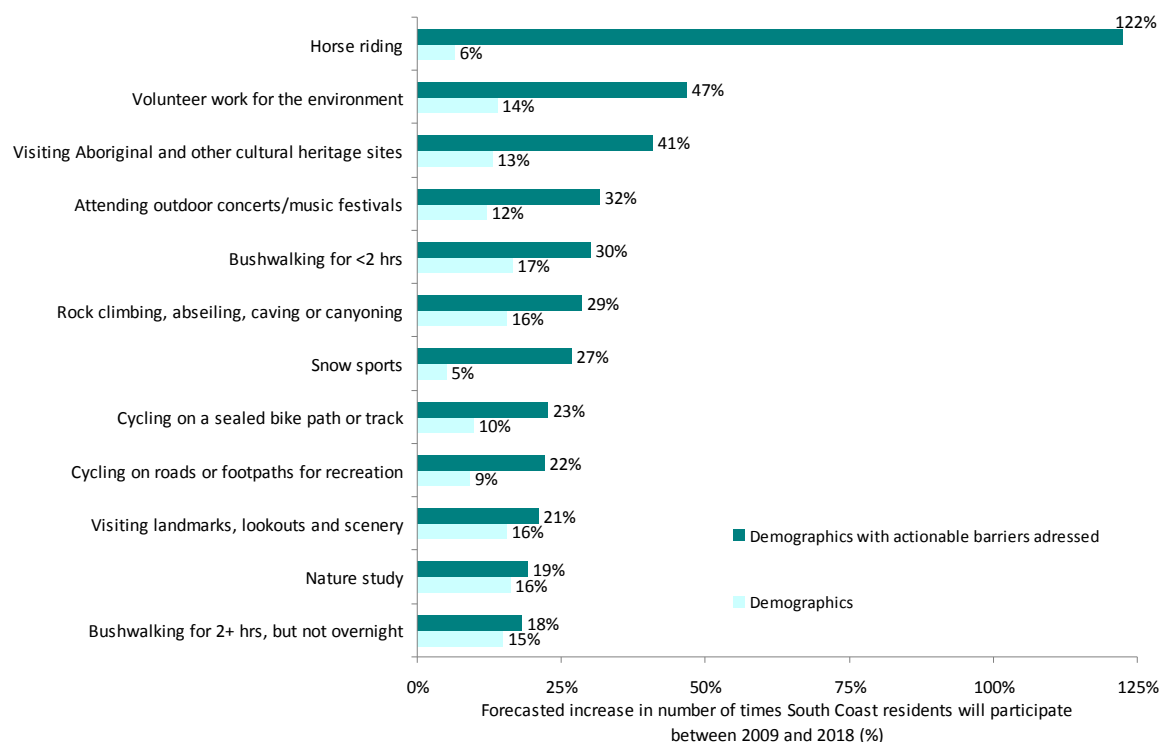


As the Figure 4.7.5 shows, walking on roads or footpaths for recreation will have the largest increase in total participation in 2018, rising by 3.9 million events in 2018 and by 4.4 million events if actionable barriers are addressed.

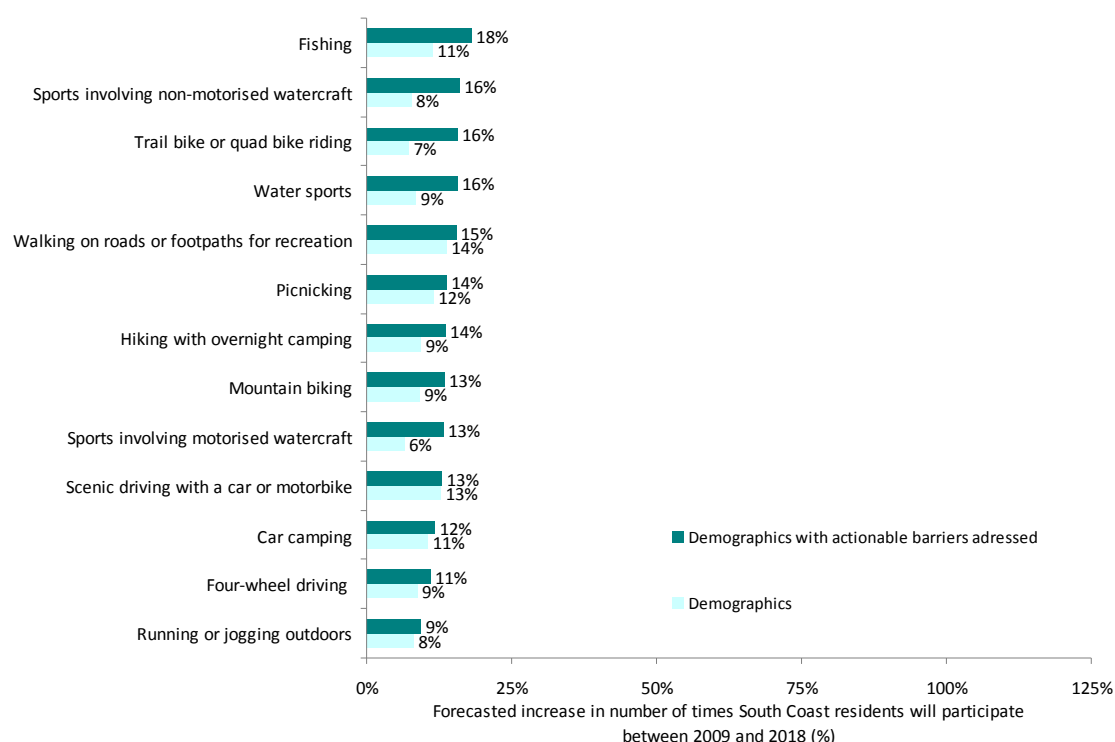
The lowest change in total annual participation from 2009 to 2018 is predicted for snow sports, rising by less than 0.1 million events in 2018 and by less than 0.1 million events if actionable barriers are addressed, as shown in Figure 4.7.6.

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**



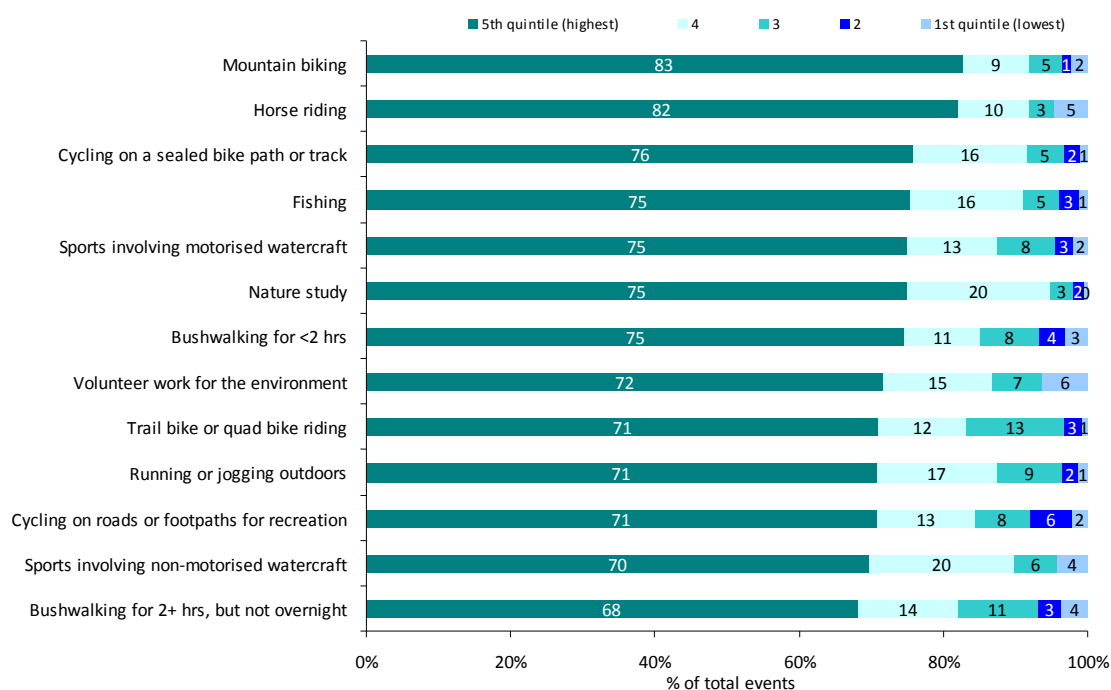
**Figure 4.7.8 Forecasted changes (%) in total participation - Part II**



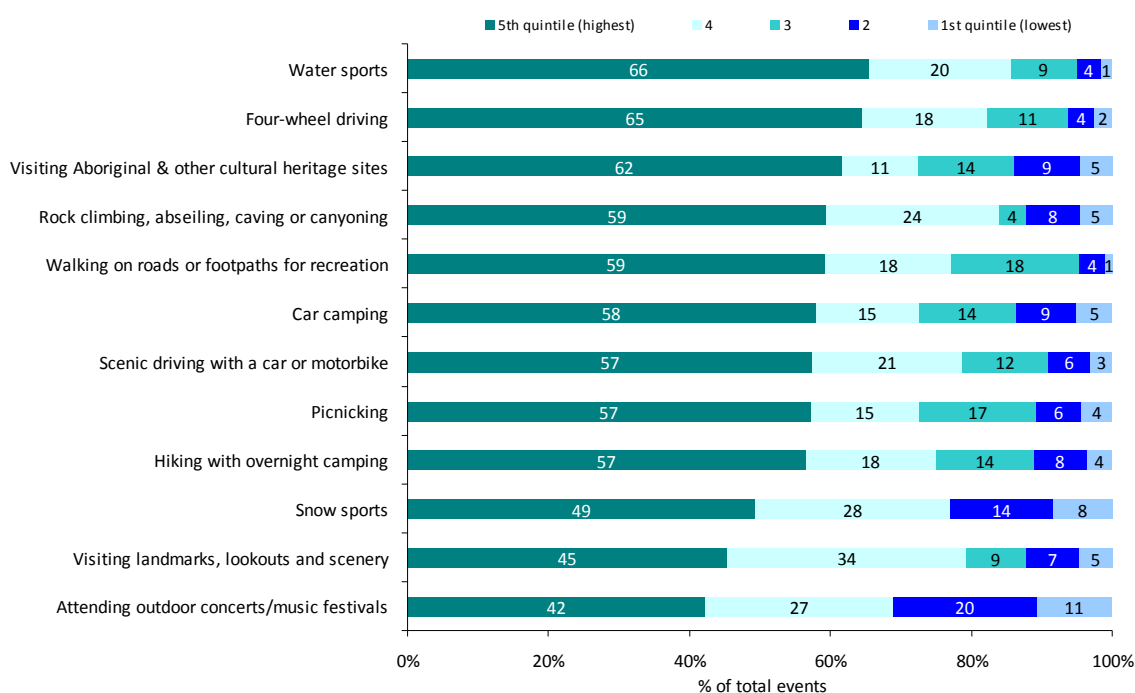
As Figure 4.7.7 shows, it is predicted that horse riding will increase by 122% in 2018 if actionable barriers are addressed. This is followed by volunteer work for the environment (47%), visiting Aboriginal and other cultural heritage sites (41%), attending outdoor concerts/music festivals (32%), and bushwalking for less than 2 hours (20%). These large percentage increases tend to be for activities that have lower frequencies of current participation. A closer look reveals that horse riding has an average interest rating of 2.2, which is at the lowest mean for all activities. However, the spike in predicted activity is partly due to the high level of actionable barriers for this activity (23%). 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 horse riding, the cut-off for the first quintile is 1 ride per year, and this 'quintile' actually makes up 44% of total horse riders. The next cut-off, of 2 rides per year per year, is shown in the chart as the 3<sup>rd</sup> quintile, and makes up 16% of total horse riders, with the remaining quintiles each making up 20% of the total horse riders.

**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 mountain biking, the highest quintile contributes 83% of total mountain bike riding, while for horse riding, the highest quintile (82%) also makes up at least 80% of the total events. The activities snow sports, visiting landmarks lookouts and

scenery 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 horse riding, volunteer work for the environment and bushwalking for less than two hours. For the activities visiting Aboriginal and other cultural heritage sites and attending outdoor concerts and music festivals, the relatively high proportion of actionable barriers can partly explain the large predicted increase in these events.

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

## Cohort approach

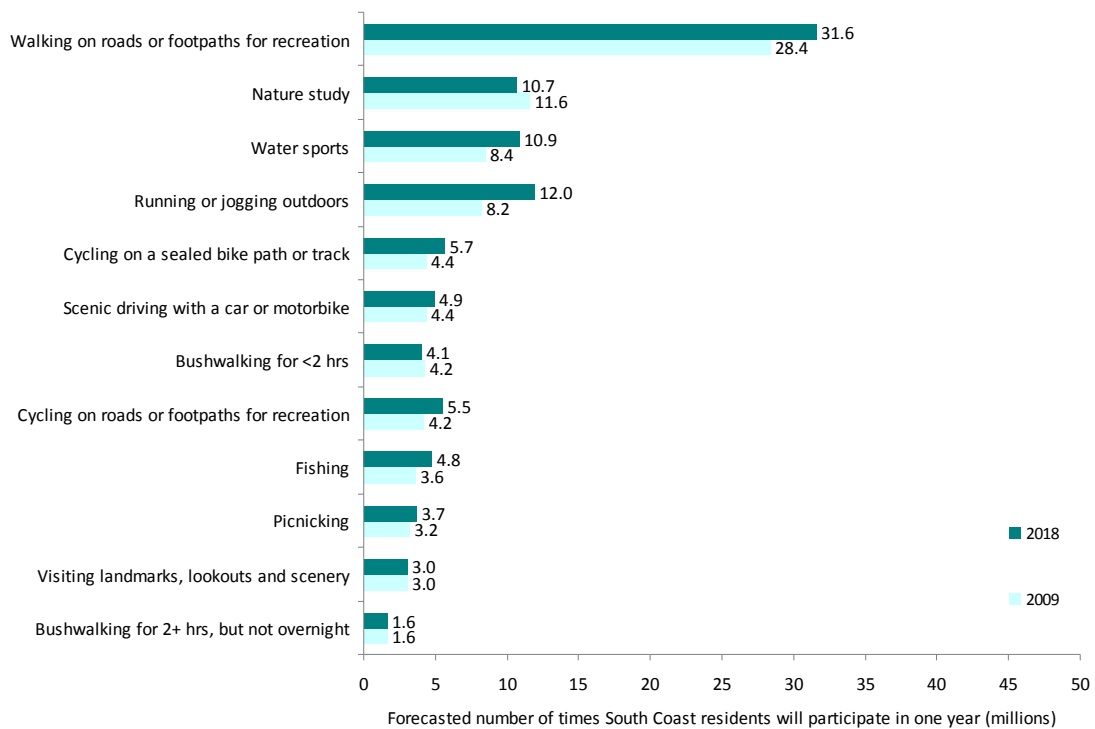
### Scenario 1: Participation changes due to demographic change in population - Cohort approach

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 (79%) is multiplied by the mean frequency for 25-34 year old male participants (81 times a year) and then multiplied by the projected population of 34-43 year old males in 2018 (30,815) 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.

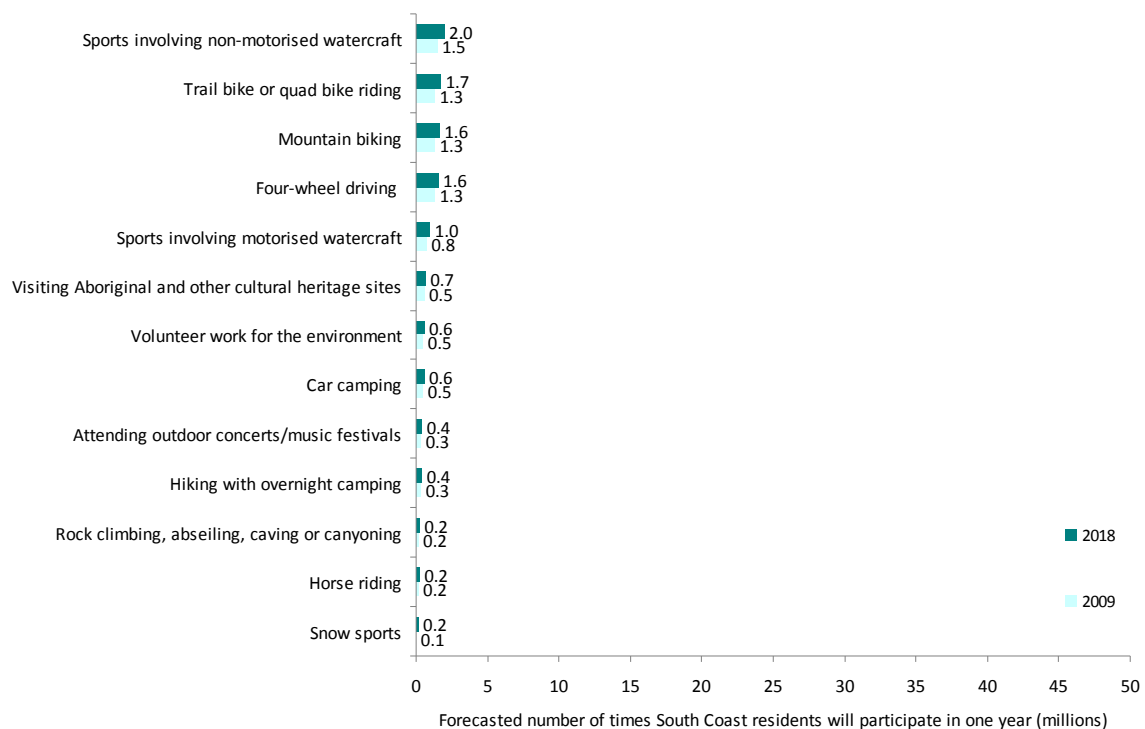
As the following charts show, the cohort approach shows little differences in many activities.



**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**

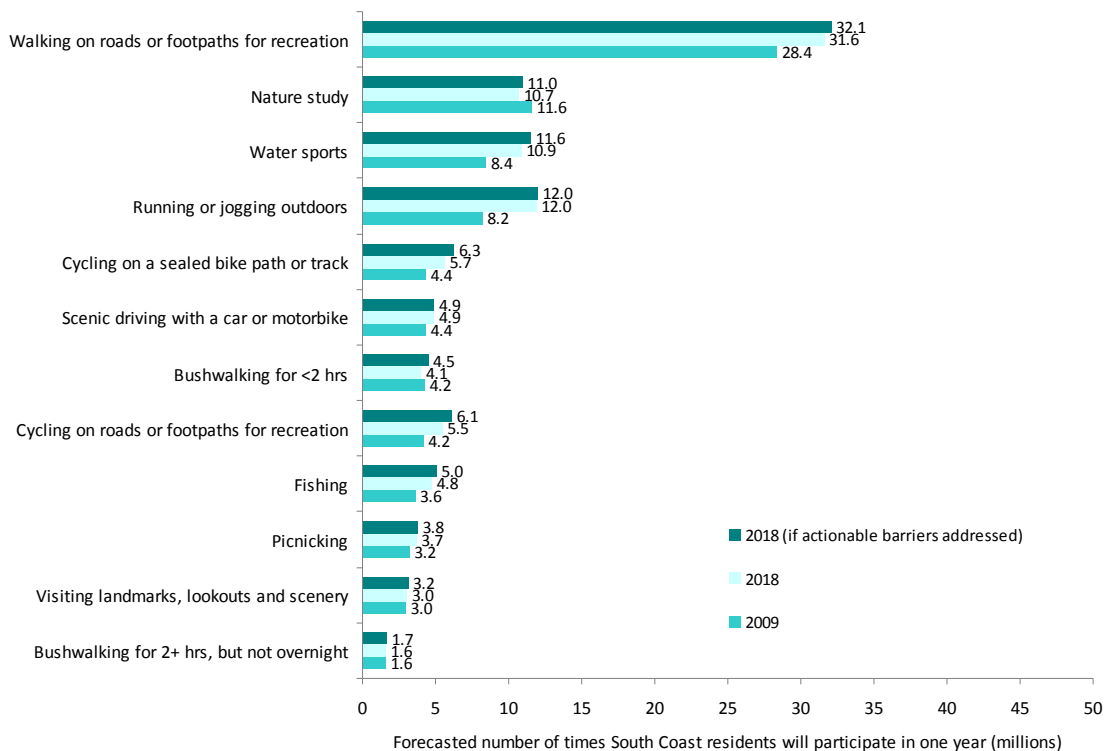


As the charts above shows, there were few large increases in any activities. The largest increase predicted was for running or jogging outdoors, rising from 8.2 million to 12.0 million events.

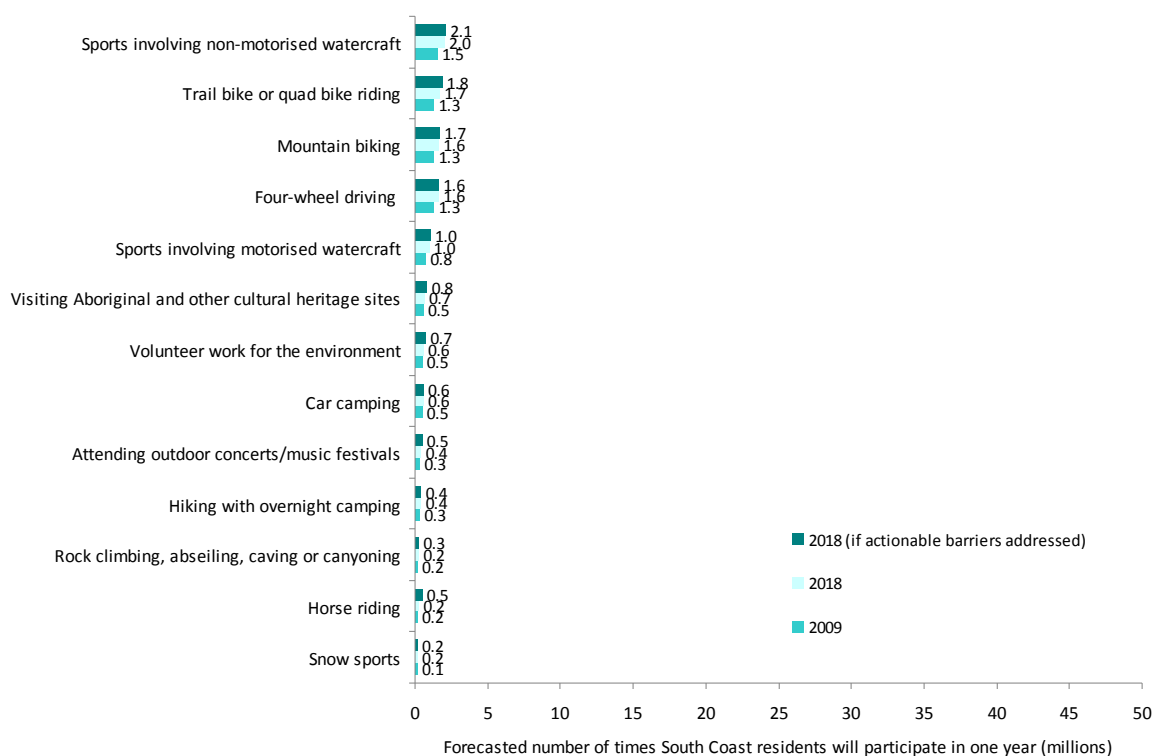
### Scenario 2: Actionable barriers are addressed and both participation and frequency increase - Cohort approach

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 0.7 million events predicted should actionable barriers be addressed.

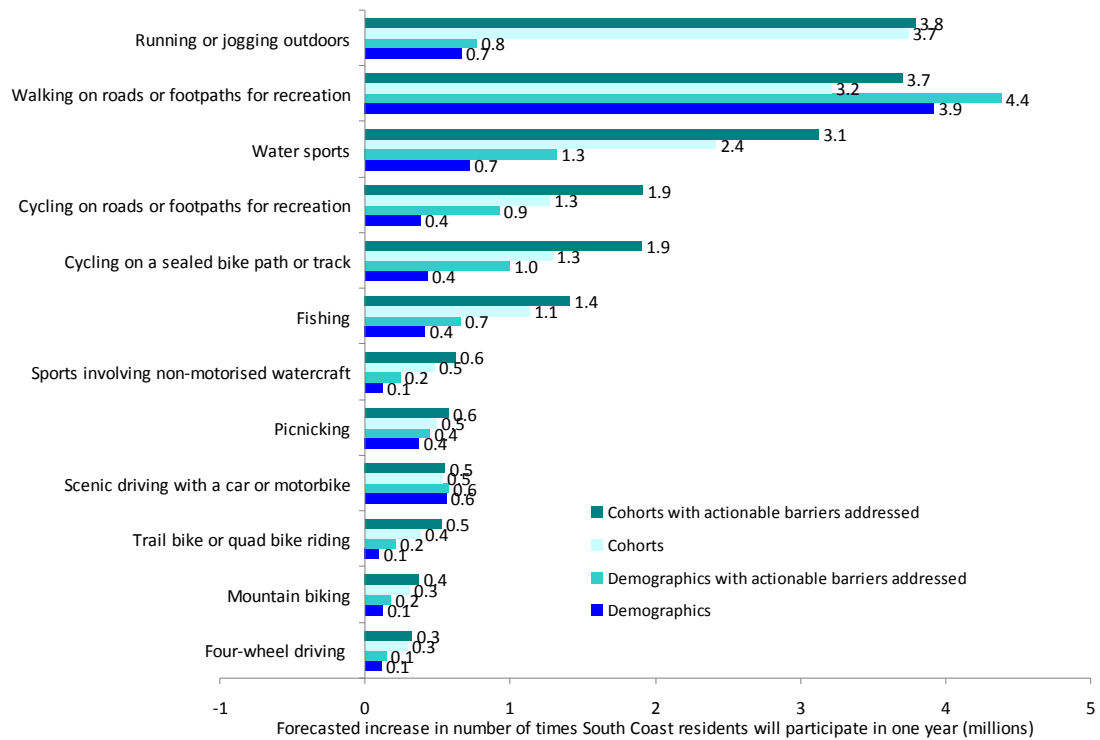
### Contrasting the two approaches

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.

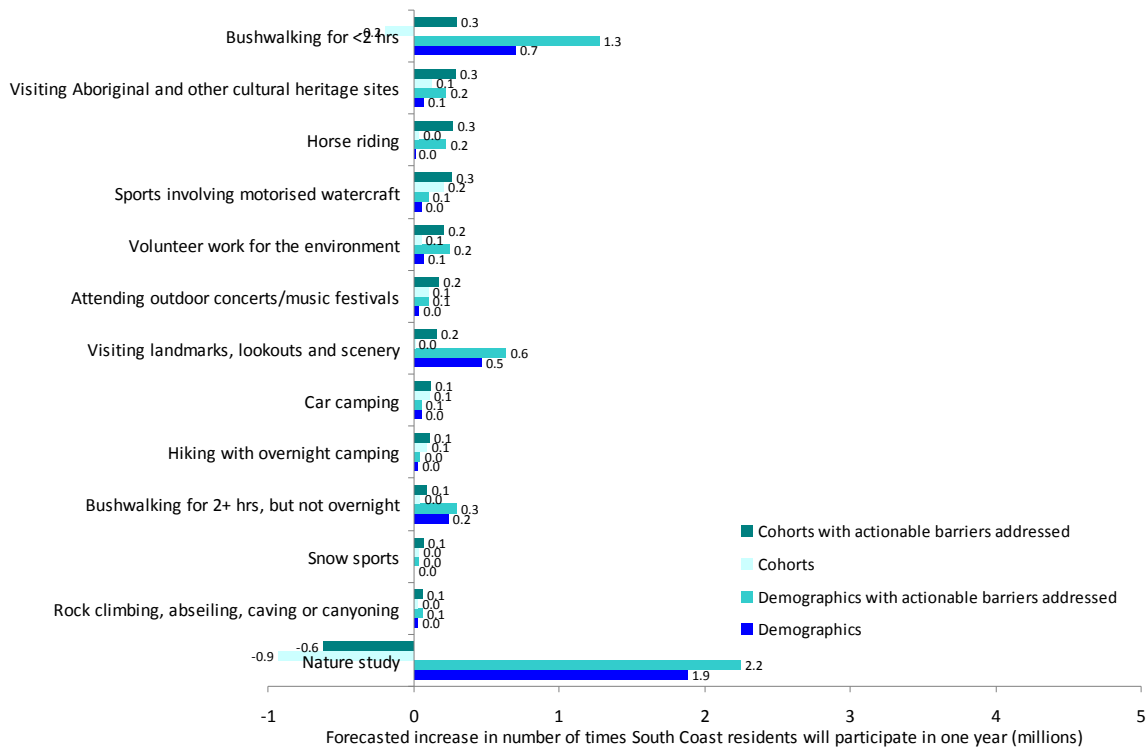
As described earlier, the demographic approach assumes that today's 30 year olds will act in the same way as the 30 year olds of 2018. It will neglect some of the generational differences identified in the qualitative research, particularly that lifestyle trends may continue the apparent shift away from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



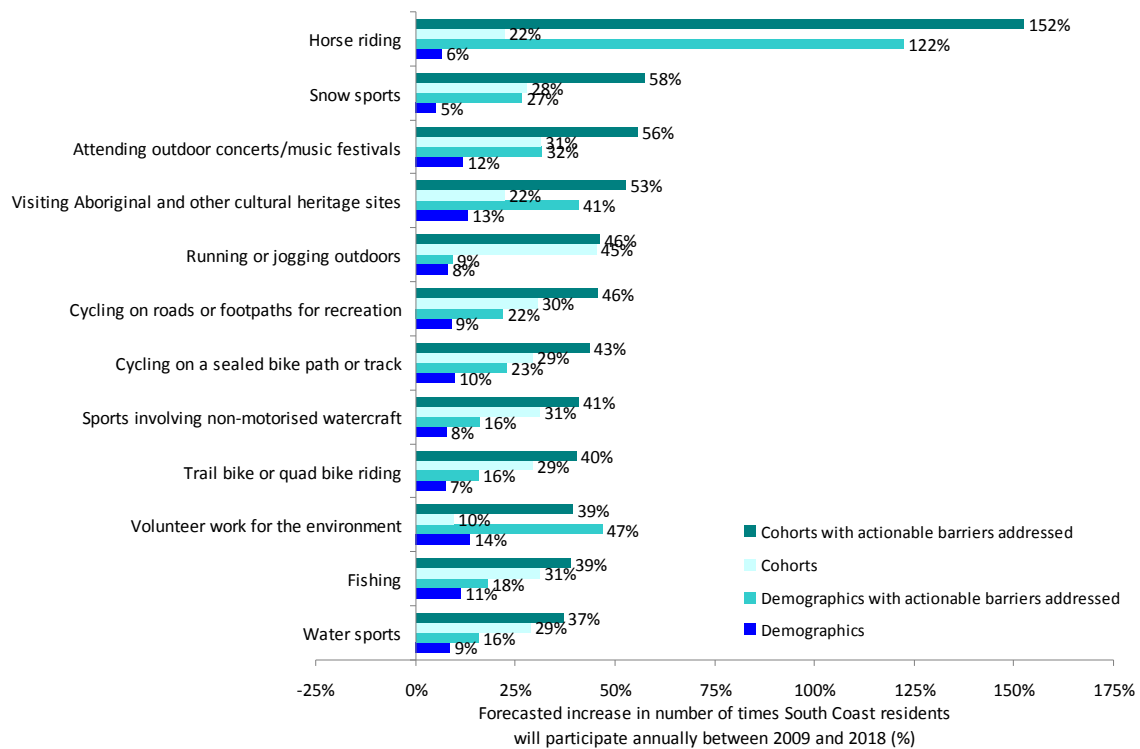
**Figure 4.7.16. Forecasted changes in total participation - Part II**



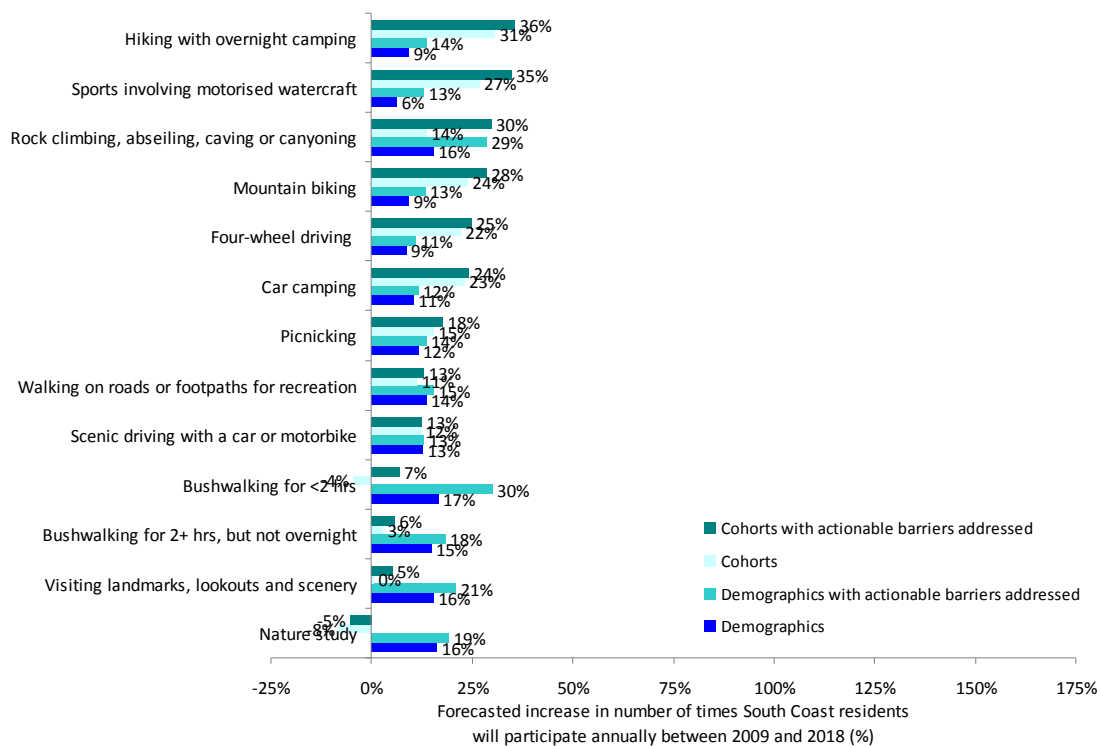
As the charts above show, the cohort approach leads to a higher increase predicted in total events for running or jogging outdoors, with an increase of 3.7 million events for the cohort approach compared to 0.7 million events for the demographics approach (if actionable barriers are addressed, the comparison is 3.8 million events for the cohort approach to 0.8 million events for demographic 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 change 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 running or jogging outdoors, 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   |

|               |                  |
|---------------|------------------|
| 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<br>Frequency<br>in last 12 | Q1.2<br>Local<br>area or<br>further | Q1.3<br>Interest<br>in doing<br>more |
|---|---------------------------------|-------------------------------------|--------------------------------------|
|---|---------------------------------|-------------------------------------|--------------------------------------|

|  | months | away or both                    | often |
|--|--------|---------------------------------|-------|
| <b>HIGH INCIDENCE ACTIVITIES</b>   |        |                                 |       |
| 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<br>[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<br>[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  |        |                                 |       |
| <b>LOW INCIDENCE ACTIVITIES</b>  |        |                                 |       |
| 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**

- 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

## APPENDIX C: DATA TABLES

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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  | 74%   | 83%   | 79%   | 87%   | 96%    | 100%  | 94%   | 83%   | 86%   |
| Walking on roads or footpaths for recreation        | 65%   | 79%   | 76%   | 76%   | 100%   | 93%   | 89%   | 85%   | 82%   |
| Visiting landmarks, lookouts and scenery            | 74%   | 75%   | 72%   | 81%   | 85%    | 89%   | 72%   | 85%   | 81%   |
| Scenic driving with a car or motorbike              | 45%   | 75%   | 69%   | 79%   | 89%    | 81%   | 83%   | 73%   | 75%   |
| Water sports  | 90%   | 75%   | 76%   | 58%   | 85%    | 78%   | 72%   | 49%   | 64%   |
| Bushwalking for <2 hrs                              | 52%   | 67%   | 55%   | 68%   | 74%    | 56%   | 72%   | 61%   | 64%   |
| Nature study  | 19%   | 29%   | 34%   | 49%   | 48%    | 30%   | 42%   | 47%   | 42%   |
| Bushwalking for 2+ hrs, but not overnight           | 35%   | 50%   | 48%   | 46%   | 37%    | 30%   | 53%   | 32%   | 41%   |
| Fishing   | 58%   | 46%   | 55%   | 48%   | 52%    | 48%   | 31%   | 22%   | 40%   |
| Running or jogging outdoors                         | 74%   | 50%   | 66%   | 22%   | 67%    | 41%   | 42%   | 16%   | 35%   |
| Cycling on a sealed bike path or track              | 55%   | 50%   | 41%   | 29%   | 52%    | 48%   | 50%   | 19%   | 35%   |
| Attending outdoor concerts/music festivals          | 58%   | 50%   | 38%   | 25%   | 63%    | 33%   | 42%   | 26%   | 35%   |
| Cycling on roads or footpaths for recreation        | 48%   | 54%   | 48%   | 33%   | 48%    | 44%   | 50%   | 13%   | 34%   |
| Visiting Aboriginal & other cultural heritage sites | 29%   | 38%   | 31%   | 35%   | 33%    | 26%   | 47%   | 27%   | 32%   |
| Car camping   | 39%   | 38%   | 41%   | 28%   | 33%    | 30%   | 33%   | 23%   | 30%   |
| Sports involving non-motorised watercraft           | 39%   | 42%   | 28%   | 34%   | 37%    | 26%   | 31%   | 17%   | 29%   |
| Four-wheel driving                                  | 29%   | 38%   | 48%   | 32%   | 15%    | 11%   | 14%   | 11%   | 23%   |
| Mountain biking                                     | 29%   | 38%   | 34%   | 21%   | 19%    | 19%   | 28%   | 9%    | 20%   |
| Sports involving motorised watercraft               | 39%   | 29%   | 31%   | 21%   | 15%    | 26%   | 14%   | 11%   | 20%   |
| Hiking with overnight camping                       | 29%   | 29%   | 24%   | 17%   | 15%    | 22%   | 22%   | 5%    | 16%   |
| Volunteer work for the environment                  | 10%   | 21%   | 14%   | 17%   | 26%    | 15%   | 19%   | 13%   | 16%   |
| Trail bike or quad bike riding                      | 39%   | 25%   | 24%   | 14%   | 7%     | 4%    | 6%    | 3%    | 12%   |
| Snow sports   | 16%   | 17%   | 21%   | 10%   | 7%     | 15%   | 14%   | 4%    | 10%   |



|   |     |     |     |    |     |    |    |    |    |
|---|-----|-----|-----|----|-----|----|----|----|----|
| Rock climbing,<br>abseiling, caving<br>or canyoning | 19% | 25% | 10% | 9% | 22% | 7% | 8% | 2% | 9% |
| Horse riding  | 3%  | 4%  | 3%  | 8% | 26% | 7% | 8% | 1% | 6% |

**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        | 92    | 81    | 65    | 114   | 132    | 111   | 98    | 127   | 111   |
| Nature study  | 12    | 68    | 42    | 114   | 18     | 94    | 52    | 112   | 89    |
| Running or jogging outdoors                         | 107   | 86    | 44    | 67    | 70     | 71    | 69    | 88    | 76    |
| Water sports  | 69    | 27    | 43    | 47    | 23     | 47    | 42    | 34    | 42    |
| Cycling on roads or footpaths for recreation        | 82    | 30    | 52    | 43    | 11     | 29    | 25    | 31    | 39    |
| Cycling on a sealed bike path or track              | 56    | 84    | 36    | 48    | 11     | 37    | 21    | 23    | 39    |
| Trail bike or quad bike riding                      | 34    | 19    | 28    | 58    | 5      | 1     | 35    | 11    | 36    |
| Fishing   | 30    | 46    | 14    | 31    | 45     | 43    | 13    | 17    | 29    |
| Mountain biking                                     | 46    | 41    | 19    | 29    | 6      | 6     | 6     | 19    | 24    |
| Bushwalking for <2 hrs                              | 6     | 21    | 24    | 26    | 11     | 11    | 8     | 28    | 21    |
| Scenic driving with a car or motorbike              | 27    | 14    | 20    | 20    | 18     | 20    | 15    | 17    | 19    |
| Four-wheel driving                                  | 32    | 12    | 18    | 12    | 2      | 5     | 47    | 23    | 18    |
| Sports involving non-motorised watercraft           | 14    | 14    | 22    | 20    | 14     | 11    | 5     | 9     | 15    |
| Sports involving motorised watercraft               | 15    | 8     | 4     | 16    | 2      | 5     | 24    | 16    | 13    |
| Bushwalking for 2+ hrs, but not overnight           | 13    | 20    | 16    | 14    | 3      | 6     | 8     | 11    | 12    |
| Visiting landmarks, lookouts and scenery            | 6     | 14    | 10    | 14    | 8      | 9     | 9     | 13    | 12    |
| Picnicking  | 11    | 13    | 13    | 12    | 10     | 16    | 12    | 11    | 12    |
| Volunteer work for the environment                  | 5     | 21    | 4     | 13    | 7      | 12    | 6     | 9     | 10    |
| Horse riding  | 2     | 1     | 1     | 3     | 3      | 27    | 8     | 100   | 9     |
| Rock climbing, abseiling, caving or canyoning       | 5     | 9     | 10    | 9     | 3      | 2     | 5     | 1     | 6     |
| Hiking with overnight camping                       | 7     | 12    | 5     | 5     | 3      | 2     | 6     | 3     | 6     |
| Visiting Aboriginal & other cultural heritage sites | 6     | 8     | 6     | 4     | 12     | 3     | 3     | 6     | 5     |
| Car camping   | 6     | 7     | 5     | 5     | 5      | 2     | 4     | 5     | 5     |
| Snow sports   | 5     | 3     | 2     | 5     | 2      | 2     | 1     | 8     | 4     |
| Attending outdoor concerts/music festivals          | 3     | 4     | 2     | 3     | 4      | 2     | 2     | 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        | 59    | 64    | 50    | 87    | 132    | 103   | 87    | 108   | 91    |
| Nature study  | 2     | 20    | 15    | 55    | 9      | 28    | 22    | 52    | 37    |
| Water sports  | 62    | 20    | 33    | 27    | 19     | 37    | 30    | 17    | 27    |
| Running or jogging outdoors                         | 80    | 43    | 29    | 15    | 46     | 29    | 29    | 14    | 27    |
| Scenic driving with a car or motorbike              | 12    | 10    | 14    | 16    | 16     | 16    | 12    | 13    | 14    |
| Cycling on a sealed bike path or track              | 31    | 42    | 15    | 14    | 6      | 18    | 10    | 4     | 14    |
| Bushwalking for <2 hrs                              | 3     | 14    | 13    | 18    | 8      | 6     | 6     | 17    | 13    |
| Cycling on roads or footpaths for recreation        | 40    | 16    | 25    | 14    | 5      | 13    | 13    | 4     | 13    |
| Fishing   | 17    | 21    | 8     | 15    | 24     | 21    | 4     | 4     | 12    |
| Picnicking  | 8     | 11    | 10    | 10    | 9      | 16    | 12    | 9     | 10    |
| Visiting landmarks, lookouts and scenery            | 5     | 10    | 7     | 12    | 6      | 8     | 7     | 11    | 10    |
| Bushwalking for 2+ hrs, but not overnight           | 5     | 10    | 8     | 7     | 1      | 2     | 4     | 3     | 5     |
| Mountain biking                                     | 13    | 15    | 7     | 6     | 1      | 1     | 2     | 2     | 5     |
| Trail bike or quad bike riding                      | 13    | 5     | 7     | 8     | 0      | 0     | 2     | 0     | 4     |
| Sports involving non-motorised watercraft           | 5     | 6     | 6     | 7     | 5      | 3     | 1     | 2     | 4     |
| Four-wheel driving                                  | 9     | 5     | 9     | 4     | 0      | 1     | 7     | 3     | 4     |
| Sports involving motorised watercraft               | 6     | 2     | 1     | 3     | 0      | 1     | 3     | 2     | 3     |
| Visiting Aboriginal & other cultural heritage sites | 2     | 3     | 2     | 1     | 4      | 1     | 1     | 2     | 2     |
| Volunteer work for the environment                  | 0     | 4     | 1     | 2     | 2      | 2     | 1     | 1     | 2     |
| Car camping   | 2     | 3     | 2     | 1     | 2      | 1     | 1     | 1     | 1     |
| Attending outdoor concerts/music festivals          | 1     | 2     | 1     | 1     | 2      | 1     | 1     | 1     | 1     |
| Hiking with overnight camping                       | 2     | 4     | 1     | 1     | 0      | 0     | 1     | 0     | 1     |
| Rock climbing, abseiling, caving or canyoning       | 1     | 2     | 1     | 1     | 1      | 0     | 0     | 0     | 1     |
| Horse riding  | 0     | 0     | 0     | 0     | 1      | 2     | 1     | 1     | 1     |
| Snow sports   | 1     | 0     | 0     | 1     | 0      | 0     | 0     | 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        | 1.1   | 1.5   | 1.5   | 7.2   | 2.3    | 2.5   | 2.8   | 9.3   | 28.3  |
| Nature study  | 0.0   | 0.5   | 0.4   | 4.6   | 0.2    | 0.7   | 0.7   | 4.5   | 11.6  |
| Water sports  | 1.2   | 0.5   | 1.0   | 2.2   | 0.3    | 0.9   | 1.0   | 1.4   | 8.5   |
| Running or jogging outdoors                         | 1.5   | 1.0   | 0.9   | 1.2   | 0.8    | 0.7   | 0.9   | 1.2   | 8.3   |
| Cycling on a sealed bike path or track              | 0.6   | 1.0   | 0.4   | 1.1   | 0.1    | 0.4   | 0.3   | 0.4   | 4.4   |
| Scenic driving with a car or motorbike              | 0.2   | 0.2   | 0.4   | 1.3   | 0.3    | 0.4   | 0.4   | 1.1   | 4.4   |
| Cycling on roads or footpaths for recreation        | 0.8   | 0.4   | 0.8   | 1.2   | 0.1    | 0.3   | 0.4   | 0.4   | 4.2   |
| Bushwalking for <2 hrs                              | 0.1   | 0.3   | 0.4   | 1.5   | 0.1    | 0.1   | 0.2   | 1.5   | 4.2   |
| Fishing   | 0.3   | 0.5   | 0.2   | 1.2   | 0.4    | 0.5   | 0.1   | 0.3   | 3.7   |
| Picnicking  | 0.2   | 0.3   | 0.3   | 0.8   | 0.2    | 0.4   | 0.4   | 0.8   | 3.2   |
| Visiting landmarks, lookouts and scenery            | 0.1   | 0.2   | 0.2   | 1.0   | 0.1    | 0.2   | 0.2   | 1.0   | 3.0   |
| Bushwalking for 2+ hrs, but not overnight           | 0.1   | 0.2   | 0.2   | 0.5   | 0.0    | 0.0   | 0.1   | 0.3   | 1.6   |
| Mountain biking                                     | 0.3   | 0.4   | 0.2   | 0.5   | 0.0    | 0.0   | 0.0   | 0.1   | 1.6   |
| Trail bike or quad bike riding                      | 0.2   | 0.1   | 0.2   | 0.7   | 0.0    | 0.0   | 0.1   | 0.0   | 1.3   |
| Sports involving non-motorised watercraft           | 0.1   | 0.1   | 0.2   | 0.6   | 0.1    | 0.1   | 0.0   | 0.1   | 1.3   |
| Four-wheel driving                                  | 0.2   | 0.1   | 0.3   | 0.3   | 0.0    | 0.0   | 0.2   | 0.2   | 1.3   |
| Sports involving motorised watercraft               | 0.1   | 0.1   | 0.0   | 0.3   | 0.0    | 0.0   | 0.1   | 0.2   | 0.8   |
| Visiting Aboriginal & other cultural heritage sites | 0.0   | 0.1   | 0.1   | 0.1   | 0.1    | 0.0   | 0.0   | 0.1   | 0.5   |
| Volunteer work for the environment                  | 0.0   | 0.1   | 0.0   | 0.2   | 0.0    | 0.0   | 0.0   | 0.1   | 0.5   |
| Car camping   | 0.0   | 0.1   | 0.1   | 0.1   | 0.0    | 0.0   | 0.0   | 0.1   | 0.5   |
| Attending outdoor concerts/music festivals          | 0.0   | 0.0   | 0.0   | 0.1   | 0.0    | 0.0   | 0.0   | 0.1   | 0.3   |
| Hiking with overnight camping                       | 0.0   | 0.1   | 0.0   | 0.1   | 0.0    | 0.0   | 0.0   | 0.0   | 0.3   |
| Rock climbing, abseiling, caving or canyoning       | 0.0   | 0.1   | 0.0   | 0.1   | 0.0    | 0.0   | 0.0   | 0.0   | 0.2   |
| Horse riding  | 0.0   | 0.0   | 0.0   | 0.0   | 0.0    | 0.0   | 0.0   | 0.1   | 0.2   |
| Snow sports   | 0.0   | 0.0   | 0.0   | 0.0   | 0.0    | 0.0   | 0.0   | 0.0   | 0.1   |

\* 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  | 5.0   | 5.6   | 6.0   | 6.3   | 7.5    | 8.0   | 6.9   | 6.0   | 6.3   |
| Visiting landmarks, lookouts and scenery            | 4.9   | 5.8   | 6.4   | 6.1   | 6.0    | 6.8   | 6.3   | 6.5   | 6.2   |
| Walking on roads or footpaths for recreation        | 4.6   | 6.7   | 5.9   | 5.6   | 6.6    | 7.3   | 7.0   | 6.3   | 6.1   |
| Scenic driving with a car or motorbike              | 5.1   | 5.3   | 6.4   | 6.2   | 6.3    | 5.4   | 6.2   | 5.9   | 5.9   |
| Water sports  | 7.8   | 6.3   | 7.0   | 5.2   | 7.0    | 6.4   | 6.4   | 4.2   | 5.6   |
| Bushwalking for <2 hrs                              | 4.2   | 5.9   | 5.5   | 5.7   | 6.1    | 5.0   | 6.1   | 5.5   | 5.5   |
| Attending outdoor concerts/music festivals          | 7.0   | 5.4   | 5.2   | 4.2   | 7.5    | 6.3   | 6.3   | 4.9   | 5.3   |
| Bushwalking for 2+ hrs, but not overnight           | 4.1   | 4.7   | 5.0   | 4.9   | 5.0    | 4.3   | 5.1   | 3.7   | 4.5   |
| Visiting Aboriginal & other cultural heritage sites | 4.5   | 3.7   | 3.9   | 4.1   | 5.4    | 4.7   | 5.4   | 4.4   | 4.4   |
| Car camping   | 5.4   | 4.0   | 6.0   | 4.4   | 5.0    | 5.3   | 5.0   | 3.2   | 4.4   |
| Sports involving non-motorised watercraft           | 5.6   | 4.3   | 4.7   | 4.2   | 5.6    | 4.0   | 5.3   | 2.7   | 4.1   |
| Fishing   | 5.0   | 5.2   | 5.7   | 4.8   | 4.5    | 3.4   | 3.2   | 2.7   | 4.0   |
| Nature study  | 2.6   | 2.6   | 4.0   | 4.4   | 4.8    | 3.2   | 4.5   | 4.3   | 4.0   |
| Volunteer work for the environment                  | 3.7   | 3.0   | 3.6   | 3.5   | 5.8    | 4.7   | 4.7   | 3.6   | 3.9   |
| Cycling on a sealed bike path or track              | 4.3   | 4.2   | 3.8   | 3.4   | 5.2    | 4.9   | 5.8   | 3.0   | 3.9   |
| Cycling on roads or footpaths for recreation        | 4.7   | 4.8   | 4.4   | 3.2   | 4.4    | 4.5   | 5.9   | 2.6   | 3.7   |
| Hiking with overnight camping                       | 5.2   | 4.4   | 4.5   | 3.6   | 4.1    | 3.5   | 4.8   | 2.4   | 3.6   |
| Snow sports   | 6.5   | 4.2   | 4.2   | 2.2   | 6.3    | 4.7   | 4.4   | 2.3   | 3.5   |
| Sports involving motorised watercraft               | 6.6   | 3.8   | 3.3   | 2.6   | 5.6    | 3.5   | 3.7   | 1.8   | 3.1   |
| Running or jogging outdoors                         | 5.8   | 3.8   | 4.4   | 2.2   | 4.9    | 3.8   | 4.8   | 1.6   | 3.1   |
| Four-wheel driving                                  | 4.9   | 3.7   | 4.9   | 3.2   | 4.1    | 2.5   | 2.6   | 1.9   | 3.1   |
| Mountain biking                                     | 4.4   | 4.0   | 3.7   | 2.1   | 4.3    | 2.4   | 3.5   | 1.7   | 2.7   |
| Rock climbing, abseiling, caving or canyoning       | 5.1   | 3.3   | 3.3   | 1.8   | 5.4    | 2.4   | 3.9   | 1.2   | 2.5   |
| Trail bike or quad bike riding                      | 6.0   | 4.0   | 3.8   | 1.9   | 4.0    | 1.6   | 1.9   | 0.8   | 2.3   |
| Horse riding  | 2.9   | 2.0   | 1.7   | 1.7   | 5.7    | 3.5   | 3.7   | 1.3   | 2.2   |

## BARRIERS AND PREFERENCES

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

| Barriers   | %     |
|--|-------|
| Lack of time   | 85.9% |
| Lack of local opportunities  | 30.3% |
| Cost of participating  | 25.3% |
| Bad weather (including rain or drought)                            | 23.2% |
| Don't have the right equipment                                     | 22.0% |
| Have no one (including pets) to do this activity with              | 20.2% |
| Fatigue/lack of motivation   | 17.9% |
| Health problems  | 14.6% |
| Unaware of local opportunities to do activity                      | 14.4% |
| Don't have transport/no way to get there/accessibility             | 11.9% |
| Not suitable for children/can't take children along                | 8.8%  |
| Not fit enough to do this activity                                 | 8.8%  |
| Too busy doing other recreational activities                       | 7.8%  |
| Transport costs (including petrol or public transport)             | 7.1%  |
| Fear of getting injured  | 5.8%  |
| Age/getting old  | 4.8%  |
| No licence   | 3.8%  |
| No experience/skilled  | 3.3%  |
| Lack of occasions/invitations presenting (external)                | 2.5%  |
| Cost of equipment required to do activity                          | 2.3%  |
| Location is too crowded  | 2.3%  |
| Poor quality/maintenance of roads/paths; no suitable walking paths | 2.3%  |
| Only do this when travelling                                       | 2.3%  |
| Restrictions on activity   | 2.0%  |
| Need to organise   | 1.8%  |
| No music i like on offer   | 1.8%  |
| Fear of wildlife / getting bitten/stung etc                        | 1.5%  |
| Traffic  | 1.5%  |
| Lack of variety/bored with local opportunities                     | 1.5%  |
| Fear for own safety among strangers                                | 1.3%  |
| Seasonal/prefer warmer weather                                     | 1.3%  |
| No lighting/dark when i want                                       | 1.3%  |
| Safety concerns  | 0.8%  |
| Prefer flat tracks   | 0.8%  |
| Availability of car parking  | 0.5%  |
| Opening hours not convenient                                       | 0.5%  |
| Need shade   | 0.5%  |
| Cost of car parking  | 0.3%  |
| Fear of being isolated   | 0.3%  |
| Cannot take pets along   | 0.3%  |
| No amenities   | 0.3%  |
| Difficulty using/carrying equipment                                | 0.3%  |
| Access to water at sites   | 0.3%  |
| Accommodation  | 0.3%  |
| Pollution  | 0.3%  |
| Environmental concern  | 0.3%  |

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

| Preference   | %   |
|--|-----|
| No additional facilities   | 48% |
| Toilets  | 47% |
| Scenery/ views (eg waterfalls)   | 40% |
| Cleared paths or trails through the bush (unsealed)                        | 40% |
| Rest areas/seats/picnic tables   | 29% |
| Good road conditions/accessibility   | 27% |
| BBQs and other food preparation areas                                      | 24% |
| Completely unspoilt surroundings   | 24% |
| Sealed paths or boardwalks   | 22% |
| Signage  | 22% |
| Water / taps   | 21% |
| Clean, well maintained environment   | 20% |
| Information boards   | 18% |
| Safety (general)   | 17% |
| Trees  | 16% |
| Parking  | 16% |
| Fauna/native animals   | 16% |
| Flora/native trees, plants and flowers                                     | 15% |
| Shelters   | 14% |
| Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 12% |
| Equipment hire / access to equipment                                       | 11% |
| Amenities / facilities (not further specified)                             | 11% |
| Flat/cleared ground (wheelchair friendly) smooth water                     | 10% |
| Brochures or maps/online info/promotion                                    | 10% |
| Lookouts   | 9%  |
| Garbage bins   | 8%  |
| Cafes or restaurants   | 8%  |
| Shade  | 8%  |
| Shops or kiosks  | 7%  |
| Isolation / infrequent to no contact with other people                     | 7%  |
| Showers  | 7%  |
| Swimming areas   | 7%  |
| Historic heritage sites  | 7%  |
| Beach/sandy areas  | 7%  |
| Campsites  | 6%  |
| Separate wide paths away from traffic/cycles                               | 5%  |
| Children playgrounds or play areas   | 5%  |
| Boat ramp / boat access  | 5%  |
| Aboriginal heritage sites  | 4%  |
| Other  | 4%  |
| Guided tours/audioguides   | 4%  |
| Leafy background   | 4%  |
| Other accommodation (eg hostels, motels, etc)                              | 3%  |
| Not too crowded  | 3%  |
| Ranger / management presence   | 3%  |
| Access to emergency services   | 3%  |
| Public transport   | 3%  |
| Instructors / coaches / training   | 3%  |
| Jetty  | 2%  |
| Garden   | 2%  |
| Ease restrictions  | 2%  |
| Visitors' centre   | 2%  |
| Powered campsites  | 2%  |
| Other people present (fellow recreationists)                               | 2%  |
| Cabins   | 2%  |
| Fish cleaning areas  | 2%  |
| Ski lifts  | 2%  |
| Change rooms   | 1%  |
| Mobile phone coverage  | 1%  |
| Events   | 1%  |
| Hand rails/fence   | 1%  |

| Preference              | %  |
|-------------------------|----|
| Lighting                | 1% |
| More restrictions       | 1% |
| Increased opening times | 1% |





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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 46% | Toilets  | 35% |
| Lack of local opportunities                            | 37% | No additional facilities   | 19% |
| Cost of participating                                  | 21% | Scenery/ views (eg waterfalls)   | 14% |
| No music i like on offer                               | 9%  | Rest areas/seats/picnic tables   | 12% |
| Not suitable for children/can't take children along    | 5%  | Shade  | 10% |
| Bad weather (including rain or drought)                | 5%  | Shelters   | 10% |
| Don't have transport/no way to get there/accessibility | 4%  | Flat/cleared ground (wheelchair friendly) smooth water                     | 9%  |
| Unaware of local opportunities to do activity          | 2%  | Parking  | 7%  |
| Have no one (including pets) to do this activity with  | 2%  | Other  | 6%  |
| Health problems  | 2%  | Trees  | 6%  |
| Too busy doing other recreational activities           | 2%  | Good road conditions/accessibility   | 6%  |
| Cost of car parking                                    | 1%  | Water / taps   | 6%  |
| Availability of car parking                            | 1%  | Safety (general)   | 5%  |
| Transport costs (including petrol or public transport) | 1%  | Completely unspoilt surroundings   | 5%  |
| Location is too crowded                                | 1%  | Public transport   | 5%  |
| Fatigue/lack of motivation                             | 1%  | Shops or kiosks  | 5%  |
| Need shade   | 1%  | BBQs and other food preparation areas                                      | 5%  |
|  |     | Cafes or restaurants   | 4%  |
|  |     | Clean, well maintained environment   | 3%  |
|  |     | Garden   | 2%  |
|  |     | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 2%  |
|  |     | Amenities / facilities (not further specified)                             | 2%  |
|  |     | Children playgrounds or play areas   | 2%  |
|  |     | Events   | 1%  |
|  |     | Lighting   | 1%  |
|  |     | Equipment hire / access to equipment                                       | 1%  |
|  |     | Garbage bins   | 1%  |
|  |     | Leafy background   | 1%  |
|  |     | Flora/native trees, plants and flowers                                     | 1%  |
|  |     | Swimming areas   | 1%  |
|  |     | Other people present (fellow recreationists)                               | 1%  |
|  |     | Not too crowded  | 1%  |
|  |     | Campsites  | 1%  |
|  |     | Ranger / management presence   | 1%  |
|  |     | Brochures or maps/online info/promotion                                    | 1%  |
|  |     | Information boards   | 1%  |
|  |     | Signage  | 1%  |

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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 72% | Cleared paths or trails through the bush (unsealed)                        | 26% |
| Health problems  | 11% | Scenery/ views (eg waterfalls)   | 25% |
| Lack of local opportunities  | 7%  | Toilets  | 17% |
| Have no one (including pets) to do this activity with              | 6%  | Signage  | 16% |
| Too busy doing other recreational activities                       | 6%  | Completely unspoilt surroundings   | 13% |
| Fatigue/lack of motivation   | 6%  | No additional facilities   | 11% |
| Unaware of local opportunities to do activity                      | 4%  | Rest areas/seats/picnic tables   | 10% |
| Not suitable for children/can't take children along                | 4%  | Flora/native trees, plants and flowers                                     | 9%  |
| Bad weather (including rain or drought)                            | 4%  | Fauna/native animals   | 8%  |
| Age/getting old  | 4%  | Trees  | 7%  |
| Cost of participating  | 2%  | Sealed paths or boardwalks   | 6%  |
| Don't have transport/no way to get there/accessibility             | 2%  | Parking  | 5%  |
| Fear of wildlife / getting bitten/stung etc                        | 2%  | Good road conditions/accessibility   | 5%  |
| Not fit enough to do this activity                                 | 1%  | BBQs and other food preparation areas                                      | 5%  |
| Fear of getting injured  | 1%  | Information boards   | 4%  |
| Poor quality/maintenance of roads/paths; no suitable walking paths | 1%  | Brochures or maps/online info/promotion                                    | 4%  |
| Only do this when travelling                                       | 1%  | Water / taps   | 4%  |
| No lighting/dark when i want                                       | 1%  | Safety (general)   | 3%  |
| Need to organise   | 1%  | Garbage bins   | 2%  |
|  |     | Isolation / infrequent to no contact with other people                     | 2%  |
|  |     | Shade  | 1%  |
|  |     | Lookouts   | 1%  |
|  |     | Not too crowded  | 1%  |
|  |     | Shops or kiosks  | 1%  |
|  |     | Separate wide paths away from traffic/cycles                               | 1%  |
|  |     | Flat/cleared ground (wheelchair friendly) smooth water                     | 1%  |
|  |     | Ease restrictions  | 1%  |
|  |     | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 1%  |
|  |     | Clean, well maintained environment   | 1%  |
|  |     | Mobile phone coverage  | 1%  |
|  |     | Shelters   | 1%  |
|  |     | Historic heritage sites  | 1%  |
|  |     | Swimming areas   | 1%  |
|  |     | Campsites  | 1%  |
|  |     | Visitors' centre   | 1%  |
|  |     | Children playgrounds or play areas   | 1%  |
|  |     | Cafes or restaurants   | 1%  |

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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 65% | Cleared paths or trails through the bush (unsealed)    | 29% |
| Health problems  | 14% | Signage  | 22% |
| Fatigue/lack of motivation                             | 8%  | Scenery/ views (eg waterfalls)                         | 18% |
| Too busy doing other recreational activities           | 6%  | Toilets  | 13% |
| Cost of participating                                  | 5%  | Completely unspoilt surroundings                       | 12% |
| Lack of local opportunities                            | 4%  | Water / taps   | 12% |
| Not suitable for children/can't take children along    | 4%  | No additional facilities                               | 10% |
| Have no one (including pets) to do this activity with  | 4%  | Brochures or maps/online info/promotion                | 8%  |
| Don't have transport/no way to get there/accessibility | 3%  | Information boards                                     | 8%  |
| Not fit enough to do this activity                     | 3%  | Fauna/native animals                                   | 7%  |
| Age/getting old  | 3%  | Parking  | 7%  |
| Need to organise                                       | 3%  | Rest areas/seats/picnic tables                         | 7%  |
| Unaware of local opportunities to do activity          | 1%  | Trees  | 5%  |
| Transport costs (including petrol or public transport) | 1%  | Safety (general)                                       | 4%  |
| Don't have the right equipment                         | 1%  | Shelters   | 4%  |
| Fear of wildlife / getting bitten/stung etc            | 1%  | Flora/native trees, plants and flowers                 | 4%  |
| Safety concerns  | 1%  | Good road conditions/accessibility                     | 4%  |
| Lack of variety/bored with local opportunities         | 1%  | Isolation / infrequent to no contact with other people | 4%  |
|  |     | Mobile phone coverage                                  | 3%  |
|  |     | Powered campsites                                      | 3%  |
|  |     | Garbage bins   | 2%  |
|  |     | Campsites  | 2%  |
|  |     | Sealed paths or boardwalks                             | 2%  |
|  |     | BBQs and other food preparation areas                  | 2%  |
|  |     | Ease restrictions                                      | 1%  |
|  |     | Historic heritage sites                                | 1%  |
|  |     | Lookouts   | 1%  |
|  |     | Not too crowded  | 1%  |
|  |     | Ranger / management presence                           | 1%  |
|  |     | Cafes or restaurants                                   | 1%  |
|  |     | Hand rails/fence                                       | 1%  |

**Table 11. Barriers and preferences - Car camping**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 63% | Toilets  | 44% |
| Have no one (including pets) to do this activity with  | 12% | Water / taps   | 18% |
| Cost of participating                                  | 8%  | Showers  | 18% |
| Not fit enough to do this activity                     | 8%  | Amenities / facilities (not further specified)                             | 17% |
| Health problems  | 7%  | BBQs and other food preparation areas                                      | 15% |
| Not suitable for children/can't take children along    | 5%  | Scenery/ views (eg waterfalls)   | 11% |
| Bad weather (including rain or drought)                | 5%  | Good road conditions/accessibility   | 11% |
| Don't have the right equipment                         | 5%  | Campsites  | 11% |
| Don't have transport/no way to get there/accessibility | 3%  | Rest areas/seats/picnic tables   | 8%  |
| Fatigue/lack of motivation                             | 3%  | No additional facilities   | 6%  |
| Lack of local opportunities                            | 2%  | Shelters   | 6%  |
| Too busy doing other recreational activities           | 2%  | Fauna/native animals   | 6%  |
| Age/getting old  | 2%  | Beach/sandy areas  | 5%  |
| Availability of car parking                            | 1%  | Safety (general)   | 5%  |
| Transport costs (including petrol or public transport) | 1%  | Cleared paths or trails through the bush (unsealed)                        | 5%  |
| Fear of being isolated                                 | 1%  | Flat/cleared ground (wheelchair friendly) smooth water                     | 4%  |
| Fear for own safety among strangers                    | 1%  | Powered campsites  | 4%  |
| Need to organise                                       | 1%  | Shops or kiosks  | 4%  |
| Restrictions on activity                               | 1%  | Other  | 3%  |
|  |     | Equipment hire / access to equipment                                       | 3%  |
|  |     | Garbage bins   | 3%  |
|  |     | Swimming areas   | 3%  |
|  |     | Isolation / infrequent to no contact with other people                     | 3%  |
|  |     | Cabins   | 3%  |
|  |     | Ease restrictions  | 2%  |
|  |     | Lighting   | 2%  |
|  |     | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 2%  |
|  |     | Clean, well maintained environment   | 2%  |
|  |     | Mobile phone coverage  | 2%  |
|  |     | Shade  | 2%  |
|  |     | Trees  | 2%  |
|  |     | Completely unspoilt surroundings   | 2%  |
|  |     | Flora/native trees, plants and flowers                                     | 2%  |
|  |     | Historic heritage sites  | 2%  |
|  |     | Parking  | 2%  |
|  |     | Not too crowded  | 2%  |
|  |     | Ranger / management presence   | 2%  |
|  |     | Events   | 1%  |
|  |     | Leafy background   | 1%  |
|  |     | Lookouts   | 1%  |
|  |     | Other people present (fellow recreationists)                               | 1%  |
|  |     | Other accommodation (eg hostels, motels, etc)                              | 1%  |

|  |  |                                    |    |
|--|--|------------------------------------|----|
|  |  | Information boards                 | 1% |
|  |  | Signage                            | 1% |
|  |  | Children playgrounds or play areas | 1% |



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

| Barriers  | %   | Preferences  | %   |
|---|-----|--|-----|
| Lack of time  | 54% | Sealed paths or boardwalks                             | 39% |
| Lack of local opportunities                           | 25% | Cleared paths or trails through the bush (unsealed)    | 30% |
| Don't have the right equipment                        | 12% | Scenery/ views (eg waterfalls)                         | 20% |
| Health problems                                       | 7%  | No additional facilities                               | 10% |
| Bad weather (including rain or drought)               | 4%  | Signage  | 10% |
| Not fit enough to do this activity                    | 4%  | Toilets  | 9%  |
| Fatigue/lack of motivation                            | 4%  | Water / taps   | 7%  |
| Have no one (including pets) to do this activity with | 3%  | Separate wide paths away from traffic/cycles           | 6%  |
| Fear of getting injured                               | 3%  | Safety (general)                                       | 6%  |
| Prefer flat tracks                                    | 3%  | Completely unspoilt surroundings                       | 6%  |
| Cost of participating                                 | 1%  | Flora/native trees, plants and flowers                 | 6%  |
| Not suitable for children/can't take children along   | 1%  | Trees  | 4%  |
| Too busy doing other recreational activities          | 1%  | Parking  | 4%  |
| No experience/skilled                                 | 1%  | Good road conditions/accessibility                     | 4%  |
|   |     | Flat/cleared ground (wheelchair friendly) smooth water | 3%  |
|   |     | Clean, well maintained environment                     | 3%  |
|   |     | Garbage bins   | 3%  |
|   |     | Shops or kiosks  | 3%  |
|   |     | BBQs and other food preparation areas                  | 3%  |
|   |     | Rest areas/seats/picnic tables                         | 3%  |
|   |     | Fauna/native animals                                   | 1%  |
|   |     | Historic heritage sites                                | 1%  |
|   |     | Lookouts   | 1%  |
|   |     | Public transport                                       | 1%  |
|   |     | Swimming areas   | 1%  |
|   |     | Children playgrounds or play areas                     | 1%  |

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

| Barriers  | %   | Preferences  | %   |
|---|-----|--|-----|
| Lack of time  | 50% | Sealed paths or boardwalks   | 43% |
| Lack of local opportunities                         | 19% | Cleared paths or trails through the bush (unsealed)                        | 38% |
| Don't have the right equipment                      | 16% | Good road conditions/accessibility   | 12% |
| Health problems                                     | 8%  | No additional facilities   | 10% |
| Fear of getting injured                             | 8%  | Safety (general)   | 10% |
| Fatigue/lack of motivation                          | 8%  | Signage  | 10% |
| Bad weather (including rain or drought)             | 6%  | Completely unspoilt surroundings   | 9%  |
| Not fit enough to do this activity                  | 6%  | Scenery/ views (eg waterfalls)   | 9%  |
| Not suitable for children/can't take children along | 3%  | Water / taps   | 9%  |
| Location is too crowded                             | 3%  | Toilets  | 7%  |
| Cost of equipment required to do activity           | 2%  | Separate wide paths away from traffic/cycles                               | 5%  |
| Cost of participating                               | 2%  | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 3%  |
| Traffic   | 2%  | Shade  | 3%  |
| Difficulty using/carrying equipment                 | 2%  | Public transport   | 3%  |
|   |     | Parking  | 3%  |
|   |     | Access to emergency services   | 2%  |
|   |     | Trees  | 2%  |
|   |     | Leafy background   | 2%  |
|   |     | Flora/native trees, plants and flowers                                     | 2%  |
|   |     | Lookouts   | 2%  |
|   |     | Information boards   | 2%  |
|   |     | Children playgrounds or play areas   | 2%  |
|   |     | Rest areas/seats/picnic tables   | 2%  |

**Table 14. Barriers and preferences - Fishing**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 61% | No additional facilities   | 26% |
| Bad weather (including rain or drought)                | 12% | Fauna/native animals   | 15% |
| Have no one (including pets) to do this activity with  | 11% | Fish cleaning areas  | 9%  |
| No licence   | 11% | Clean, well maintained environment   | 9%  |
| Don't have the right equipment                         | 9%  | Good road conditions/accessibility   | 9%  |
| Cost of participating                                  | 8%  | Boat ramp / boat access  | 8%  |
| Lack of local opportunities                            | 6%  | Jetty  | 8%  |
| Health problems  | 6%  | Water / taps   | 6%  |
| Only do this when travelling                           | 6%  | Safety (general)   | 5%  |
| Don't have transport/no way to get there/accessibility | 5%  | Isolation / infrequent to no contact with other people                     | 5%  |
| Fatigue/lack of motivation                             | 5%  | Rest areas/seats/picnic tables   | 5%  |
| Location is too crowded                                | 3%  | Toilets  | 5%  |
| Seasonal/prefer warmer weather                         | 3%  | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 4%  |
| Unaware of local opportunities to do activity          | 2%  | Equipment hire / access to equipment                                       | 4%  |
| Age/getting old  | 2%  | Completely unspoilt surroundings   | 4%  |
| Need to organise                                       | 2%  | Parking  | 4%  |
|  |     | Cleared paths or trails through the bush (unsealed)                        | 4%  |
|  |     | BBQs and other food preparation areas                                      | 4%  |
|  |     | Other  | 3%  |
|  |     | Ease restrictions  | 3%  |
|  |     | Amenities / facilities (not further specified)                             | 3%  |
|  |     | Information boards   | 3%  |
|  |     | More restrictions  | 1%  |
|  |     | Instructors / coaches / training   | 1%  |
|  |     | Shelters   | 1%  |
|  |     | Trees  | 1%  |
|  |     | Historic heritage sites  | 1%  |
|  |     | Sealed paths or boardwalks   | 1%  |



**Table 15. Barriers and preferences - Four-wheel driving**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Don't have the right equipment                         | 48% | No additional facilities   | 19% |
| Lack of time   | 40% | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 16% |
| Cost of participating                                  | 7%  | Completely unspoilt surroundings   | 14% |
| Restrictions on activity                               | 7%  | Scenery/ views (eg waterfalls)   | 13% |
| Have no one (including pets) to do this activity with  | 5%  | Good road conditions/accessibility   | 12% |
| Lack of local opportunities                            | 2%  | Cleared paths or trails through the bush (unsealed)                        | 9%  |
| Cost of equipment required to do activity              | 2%  | Separate wide paths away from traffic/cycles                               | 7%  |
| Don't have transport/no way to get there/accessibility | 2%  | Clean, well maintained environment   | 6%  |
| Not fit enough to do this activity                     | 2%  | Toilets  | 6%  |
| Fatigue/lack of motivation                             | 2%  | Trees  | 3%  |
| No licence   | 2%  | Isolation / infrequent to no contact with other people                     | 3%  |
|  |     | Brochures or maps/online info/promotion                                    | 3%  |
|  |     | Signage  | 3%  |
|  |     | Sealed paths or boardwalks   | 3%  |
|  |     | BBQs and other food preparation areas                                      | 3%  |
|  |     | Beach/sandy areas  | 1%  |
|  |     | Flat/cleared ground (wheelchair friendly) smooth water                     | 1%  |
|  |     | Ease restrictions  | 1%  |
|  |     | Instructors / coaches / training   | 1%  |
|  |     | Safety (general)   | 1%  |
|  |     | Access to emergency services   | 1%  |
|  |     | Mobile phone coverage  | 1%  |
|  |     | Shelters   | 1%  |
|  |     | Garbage bins   | 1%  |
|  |     | Leafy background   | 1%  |
|  |     | Swimming areas   | 1%  |
|  |     | Information boards   | 1%  |
|  |     | Water / taps   | 1%  |
|  |     | Rest areas/seats/picnic tables   | 1%  |

**Table 16. Barriers and preferences - Hiking with overnight camping**

| Barriers   | %   | Preferences   | %   |
|--|-----|---|-----|
| Lack of time   | 53% | Toilets   | 31% |
| Health problems  | 14% | No additional facilities                            | 21% |
| Not suitable for children/can't take children along    | 12% | Scenery/ views (eg waterfalls)                      | 21% |
| Have no one (including pets) to do this activity with  | 9%  | Campsites   | 13% |
| Unaware of local opportunities to do activity          | 7%  | Cleared paths or trails through the bush (unsealed) | 12% |
| Bad weather (including rain or drought)                | 7%  | Showers   | 12% |
| Not fit enough to do this activity                     | 7%  | Equipment hire / access to equipment                | 10% |
| Cost of participating                                  | 3%  | Completely unspoilt surroundings                    | 10% |
| Don't have the right equipment                         | 3%  | Trees   | 8%  |
| Too busy doing other recreational activities           | 3%  | Cabins  | 8%  |
| Age/getting old  | 3%  | Water / taps  | 8%  |
| Lack of variety/bored with local opportunities         | 3%  | Brochures or maps/online info/promotion             | 4%  |
| Lack of local opportunities                            | 2%  | Information boards                                  | 4%  |
| Don't have transport/no way to get there/accessibility | 2%  | Signage   | 4%  |
| Fear for own safety among strangers                    | 2%  | BBQs and other food preparation areas               | 4%  |
| Opening hours not convenient                           | 2%  | Shelters  | 2%  |
| Fatigue/lack of motivation                             | 2%  | Garbage bins  | 2%  |
| Access to water at sites                               | 2%  | Flora/native trees, plants and flowers              | 2%  |
| Prefer flat tracks                                     | 2%  | Historic heritage sites                             | 2%  |
| Need to organise                                       | 2%  | Lookouts  | 2%  |
| Restrictions on activity                               | 2%  | Parking   | 2%  |
|  |     | Good road conditions/accessibility                  | 2%  |
|  |     | Children playgrounds or play areas                  | 2%  |
|  |     | Rest areas/seats/picnic tables                      | 2%  |

**Table 17. Barriers and preferences - Horse riding**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 41% | Cleared paths or trails through the bush (unsealed)                        | 34% |
| Cost of participating                                  | 24% | No additional facilities   | 28% |
| Unaware of local opportunities to do activity          | 12% | Flora/native trees, plants and flowers                                     | 13% |
| Lack of local opportunities                            | 12% | Scenery/ views (eg waterfalls)   | 13% |
| Don't have the right equipment                         | 12% | Signage  | 13% |
| Fear of getting injured                                | 12% | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 9%  |
| Health problems  | 9%  | Leafy background   | 9%  |
| Cost of equipment required to do activity              | 3%  | Water / taps   | 9%  |
| Don't have transport/no way to get there/accessibility | 3%  | Other  | 6%  |
| Fatigue/lack of motivation                             | 3%  | Equipment hire / access to equipment                                       | 6%  |
| Age/getting old  | 3%  | Parking  | 6%  |
| No experience/skilled                                  | 3%  | Isolation / infrequent to no contact with other people                     | 6%  |
|  |     | Brochures or maps/online info/promotion                                    | 6%  |
|  |     | Toilets  | 6%  |
|  |     | Beach/sandy areas  | 3%  |
|  |     | Separate wide paths away from traffic/cycles                               | 3%  |
|  |     | Flat/cleared ground (wheelchair friendly) smooth water                     | 3%  |
|  |     | Amenities / facilities (not further specified)                             | 3%  |
|  |     | Clean, well maintained environment   | 3%  |
|  |     | Shade  | 3%  |
|  |     | Trees  | 3%  |
|  |     | Completely unspoilt surroundings   | 3%  |
|  |     | Fauna/native animals   | 3%  |
|  |     | Good road conditions/accessibility   | 3%  |
|  |     | Information boards   | 3%  |
|  |     | Cafes or restaurants   | 3%  |

**Table 18. Barriers and preferences - Mountain biking**

| Barriers  | %   | Preferences  | %   |
|---|-----|--|-----|
| Lack of time  | 48% | Cleared paths or trails through the bush (unsealed)                        | 32% |
| Don't have the right equipment                        | 20% | Sealed paths or boardwalks   | 16% |
| Not suitable for children/can't take children along   | 14% | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 14% |
| Health problems                                       | 14% | Completely unspoilt surroundings   | 14% |
| Lack of local opportunities                           | 9%  | Good road conditions/accessibility   | 14% |
| Not fit enough to do this activity                    | 7%  | Signage  | 14% |
| Bad weather (including rain or drought)               | 5%  | Toilets  | 14% |
| Cost of equipment required to do activity             | 2%  | Scenery/ views (eg waterfalls)   | 9%  |
| Have no one (including pets) to do this activity with | 2%  | No additional facilities   | 7%  |
| Too busy doing other recreational activities          | 2%  | Rest areas/seats/picnic tables   | 7%  |
| Opening hours not convenient                          | 2%  | Trees  | 5%  |
| Fatigue/lack of motivation                            | 2%  | Flora/native trees, plants and flowers                                     | 5%  |
|   |     | Parking  | 5%  |
|   |     | Water / taps   | 5%  |
|   |     | Separate wide paths away from traffic/cycles                               | 2%  |
|   |     | Flat/cleared ground (wheelchair friendly) smooth water                     | 2%  |
|   |     | Amenities / facilities (not further specified)                             | 2%  |
|   |     | Clean, well maintained environment   | 2%  |
|   |     | Safety (general)   | 2%  |
|   |     | Shade  | 2%  |
|   |     | Garbage bins   | 2%  |
|   |     | Brochures or maps/online info/promotion                                    | 2%  |
|   |     | Children playgrounds or play areas   | 2%  |

**Table 19. Barriers and preferences - Nature study**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 74% | Completely unspoilt surroundings   | 20% |
| Don't have transport/no way to get there/accessibility             | 11% | Information boards   | 20% |
| Lack of local opportunities  | 9%  | No additional facilities   | 19% |
| Health problems  | 6%  | Fauna/native animals   | 16% |
| Unaware of local opportunities to do activity                      | 4%  | Scenery/ views (eg waterfalls)   | 11% |
| Have no one (including pets) to do this activity with              | 4%  | Lookouts   | 11% |
| Age/getting old  | 4%  | Shelters   | 8%  |
| No experience/skilled  | 4%  | Brochures or maps/online info/promotion                                    | 8%  |
| Cost of participating  | 2%  | Sealed paths or boardwalks   | 8%  |
| Bad weather (including rain or drought)                            | 2%  | Toilets  | 8%  |
| Don't have the right equipment                                     | 2%  | Flora/native trees, plants and flowers                                     | 7%  |
| Fear of wildlife / getting bitten/stung etc                        | 2%  | Good road conditions/accessibility   | 7%  |
| Fear for own safety among strangers                                | 2%  | Isolation / infrequent to no contact with other people                     | 7%  |
| Too busy doing other recreational activities                       | 2%  | Clean, well maintained environment   | 5%  |
| Poor quality/maintenance of roads/paths; no suitable walking paths | 2%  | Trees  | 5%  |
| Seasonal/prefer warmer weather                                     | 2%  | BBQs and other food preparation areas                                      | 5%  |
| Only do this when travelling                                       | 2%  | Rest areas/seats/picnic tables   | 5%  |
|  |     | Water / taps   | 4%  |
|  |     | Garbage bins   | 3%  |
|  |     | Signage  | 3%  |
|  |     | Cleared paths or trails through the bush (unsealed)                        | 3%  |
|  |     | Other  | 1%  |
|  |     | Garden   | 1%  |
|  |     | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 1%  |
|  |     | Amenities / facilities (not further specified)                             | 1%  |
|  |     | Instructors / coaches / training   | 1%  |
|  |     | Equipment hire / access to equipment                                       | 1%  |
|  |     | Safety (general)   | 1%  |
|  |     | Access to emergency services   | 1%  |
|  |     | Parking  | 1%  |
|  |     | Campsites  | 1%  |
|  |     | Ranger / management presence   | 1%  |

**Table 20. Barriers and preferences - Picnicking**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 61% | BBQs and other food preparation areas                  | 36% |
| Have no one (including pets) to do this activity with  | 22% | Toilets  | 30% |
| Bad weather (including rain or drought)                | 9%  | Rest areas/seats/picnic tables                         | 27% |
| Lack of occasions/invitations presenting (external)    | 7%  | Water / taps   | 16% |
| Not fit enough to do this activity                     | 5%  | Shelters   | 15% |
| Too busy doing other recreational activities           | 4%  | Clean, well maintained environment                     | 13% |
| Lack of local opportunities                            | 3%  | Flat/cleared ground (wheelchair friendly) smooth water | 13% |
| Location is too crowded                                | 2%  | Scenery/ views (eg waterfalls)                         | 12% |
| Fatigue/lack of motivation                             | 2%  | No additional facilities                               | 9%  |
| Cost of participating                                  | 2%  | Amenities / facilities (not further specified)         | 9%  |
| Don't have transport/no way to get there/accessibility | 2%  | Garbage bins   | 8%  |
| Unaware of local opportunities to do activity          | 1%  | Trees  | 8%  |
| Transport costs (including petrol or public transport) | 1%  | Shade  | 6%  |
| Not suitable for children/can't take children along    | 1%  | Children playgrounds or play areas                     | 5%  |
| Health problems  | 1%  | Good road conditions/accessibility                     | 4%  |
| Don't have the right equipment                         | 1%  | Garden   | 4%  |
| No amenities   | 1%  | Fauna/native animals                                   | 4%  |
|  |     | Swimming areas   | 4%  |
|  |     | Leafy background                                       | 3%  |
|  |     | Flora/native trees, plants and flowers                 | 3%  |
|  |     | Not too crowded  | 2%  |
|  |     | Signage  | 2%  |
|  |     | Equipment hire / access to equipment                   | 2%  |
|  |     | Parking  | 2%  |
|  |     | Other  | 1%  |
|  |     | Beach/sandy areas                                      | 1%  |
|  |     | Events   | 1%  |
|  |     | Lighting   | 1%  |
|  |     | Safety (general)                                       | 1%  |
|  |     | Completely unspoilt surroundings                       | 1%  |
|  |     | Other people present (fellow recreationists)           | 1%  |
|  |     | Shops or kiosks  | 1%  |
|  |     | Lookouts   | 1%  |
|  |     | Powered campsites                                      | 1%  |
|  |     | Ranger / management presence                           | 1%  |
|  |     | Brochures or maps/online info/promotion                | 1%  |
|  |     | Cafes or restaurants                                   | 1%  |
|  |     | Sealed paths or boardwalks                             | 1%  |
|  |     | Cleared paths or trails through the bush (unsealed)    | 1%  |
|  |     | Change rooms   | 1%  |

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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 50% | Completely unspoilt surroundings   | 18% |
| Don't have transport/no way to get there/accessibility | 17% | Good road conditions/accessibility   | 18% |
| Lack of local opportunities                            | 14% | No additional facilities   | 15% |
| Fatigue/lack of motivation                             | 8%  | Equipment hire / access to equipment                                       | 15% |
| Cost of participating                                  | 6%  | Safety (general)   | 12% |
| Have no one (including pets) to do this activity with  | 6%  | Scenery/ views (eg waterfalls)   | 12% |
| Not fit enough to do this activity                     | 6%  | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 9%  |
| Fear of getting injured                                | 6%  | Toilets  | 9%  |
| Age/getting old  | 6%  | Instructors / coaches / training   | 6%  |
| No experience/skilled                                  | 6%  | Parking  | 6%  |
| Unaware of local opportunities to do activity          | 3%  | Access to emergency services   | 3%  |
| Cost of equipment required to do activity              | 3%  | Trees  | 3%  |
| Not suitable for children/can't take children along    | 3%  | Other people present (fellow recreationists)                               | 3%  |
| Health problems  | 3%  | Not too crowded  | 3%  |
| Don't have the right equipment                         | 3%  | Campsites  | 3%  |
|  |     | Signage  | 3%  |
|  |     | Shops or kiosks  | 3%  |
|  |     | Rest areas/seats/picnic tables   | 3%  |

**Table 22. Barriers and preferences - Running or jogging outdoors**

| Barriers  | %   | Preferences  | %   |
|---|-----|--|-----|
| Lack of time  | 57% | Cleared paths or trails through the bush (unsealed)    | 33% |
| Health problems                                       | 11% | No additional facilities                               | 27% |
| Fatigue/lack of motivation                            | 11% | Scenery/ views (eg waterfalls)                         | 13% |
| Lack of local opportunities                           | 8%  | Completely unspoilt surroundings                       | 12% |
| Bad weather (including rain or drought)               | 8%  | Flat/cleared ground (wheelchair friendly) smooth water | 6%  |
| Have no one (including pets) to do this activity with | 5%  | Safety (general)                                       | 6%  |
| Not fit enough to do this activity                    | 5%  | Trees  | 6%  |
| Unaware of local opportunities to do activity         | 3%  | Water / taps   | 6%  |
| Fear for own safety among strangers                   | 3%  | Clean, well maintained environment                     | 4%  |
| Too busy doing other recreational activities          | 3%  | Fauna/native animals                                   | 4%  |
|   |     | Good road conditions/accessibility                     | 4%  |
|   |     | Isolation / infrequent to no contact with other people | 4%  |
|   |     | Signage  | 4%  |
|   |     | Toilets  | 4%  |
|   |     | Separate wide paths away from traffic/cycles           | 2%  |
|   |     | Lighting   | 2%  |
|   |     | Amenities / facilities (not further specified)         | 2%  |
|   |     | Access to emergency services                           | 2%  |
|   |     | Flora/native trees, plants and flowers                 | 2%  |
|   |     | Parking  | 2%  |
|   |     | Cafes or restaurants                                   | 2%  |
|   |     | Shops or kiosks  | 2%  |
|   |     | Rest areas/seats/picnic tables                         | 2%  |



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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 70% | No additional facilities   | 21% |
| Transport costs (including petrol or public transport) | 11% | Scenery/ views (eg waterfalls)   | 17% |
| Cost of participating                                  | 10% | Good road conditions/accessibility   | 16% |
| Fatigue/lack of motivation                             | 7%  | Rest areas/seats/picnic tables   | 12% |
| Too busy doing other recreational activities           | 6%  | Completely unspoilt surroundings   | 10% |
| No licence   | 6%  | Toilets  | 9%  |
| Don't have the right equipment                         | 5%  | Signage  | 8%  |
| Health problems  | 4%  | Cafes or restaurants   | 8%  |
| Have no one (including pets) to do this activity with  | 3%  | Shops or kiosks  | 8%  |
| Unaware of local opportunities to do activity          | 1%  | Lookouts   | 7%  |
| Not suitable for children/can't take children along    | 1%  | Parking  | 6%  |
| Bad weather (including rain or drought)                | 1%  | Clean, well maintained environment   | 5%  |
| Don't have transport/no way to get there/accessibility | 1%  | Trees  | 4%  |
| Environmental concern                                  | 1%  | Shelters   | 3%  |
|  |     | Garbage bins   | 3%  |
|  |     | Historic heritage sites  | 3%  |
|  |     | Information boards   | 3%  |
|  |     | Sealed paths or boardwalks   | 3%  |
|  |     | Fauna/native animals   | 2%  |
|  |     | Flora/native trees, plants and flowers                                     | 2%  |
|  |     | Other accommodation (eg hostels, motels, etc)                              | 2%  |
|  |     | BBQs and other food preparation areas                                      | 2%  |
|  |     | Events   | 1%  |
|  |     | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 1%  |
|  |     | Safety (general)   | 1%  |
|  |     | Access to emergency services   | 1%  |
|  |     | Leafy background   | 1%  |
|  |     | Not too crowded  | 1%  |
|  |     | Isolation / infrequent to no contact with other people                     | 1%  |
|  |     | Ranger / management presence   | 1%  |
|  |     | Brochures or maps/online info/promotion                                    | 1%  |
|  |     | Visitors' centre   | 1%  |
|  |     | Cleared paths or trails through the bush (unsealed)                        | 1%  |
|  |     | Water / taps   | 1%  |

**Table 24. Barriers and preferences - Snow sports**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Cost of participating                                  | 63% | No additional facilities   | 39% |
| Lack of time   | 60% | Other accommodation (eg hostels, motels, etc)                              | 18% |
| Lack of local opportunities                            | 19% | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 14% |
| Bad weather (including rain or drought)                | 8%  | Ski lifts  | 12% |
| Not suitable for children/can't take children along    | 6%  | Good road conditions/accessibility   | 8%  |
| Don't have transport/no way to get there/accessibility | 6%  | Signage  | 8%  |
| Not fit enough to do this activity                     | 4%  | Toilets  | 6%  |
| Unaware of local opportunities to do activity          | 2%  | Instructors / coaches / training   | 4%  |
| Health problems  | 2%  | Safety (general)   | 4%  |
| Fatigue/lack of motivation                             | 2%  | Completely unspoilt surroundings   | 4%  |
| No experience/skilled                                  | 2%  | Parking  | 4%  |
|  |     | Cafes or restaurants   | 4%  |
|  |     | Cleared paths or trails through the bush (unsealed)                        | 4%  |
|  |     | Separate wide paths away from traffic/cycles                               | 2%  |
|  |     | Clean, well maintained environment   | 2%  |
|  |     | Equipment hire / access to equipment                                       | 2%  |
|  |     | Shelters   | 2%  |
|  |     | Flora/native trees, plants and flowers                                     | 2%  |
|  |     | Scenery/ views (eg waterfalls)   | 2%  |
|  |     | Lookouts   | 2%  |
|  |     | Not too crowded  | 2%  |
|  |     | Cabins   | 2%  |
|  |     | Campsites  | 2%  |
|  |     | Brochures or maps/online info/promotion                                    | 2%  |
|  |     | Children playgrounds or play areas   | 2%  |
|  |     | BBQs and other food preparation areas                                      | 2%  |
|  |     | Rest areas/seats/picnic tables   | 2%  |

**Table 25. Barriers and preferences - Sports involving motorised watercraft**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 39% | No additional facilities   | 26% |
| Don't have the right equipment                         | 32% | Boat ramp / boat access  | 18% |
| Cost of participating                                  | 21% | Equipment hire / access to equipment                                       | 15% |
| Lack of local opportunities                            | 11% | Completely unspoilt surroundings   | 12% |
| Don't have transport/no way to get there/accessibility | 8%  | Signage  | 9%  |
| Bad weather (including rain or drought)                | 5%  | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 6%  |
| Too busy doing other recreational activities           | 5%  | Clean, well maintained environment   | 6%  |
| Transport costs (including petrol or public transport) | 3%  | Parking  | 6%  |
| Cost of equipment required to do activity              | 3%  | Good road conditions/accessibility   | 6%  |
| Not suitable for children/can't take children along    | 3%  | Toilets  | 6%  |
| Have no one (including pets) to do this activity with  | 3%  | Beach/sandy areas  | 3%  |
| Health problems  | 3%  | Ease restrictions  | 3%  |
| Fear for own safety among strangers                    | 3%  | Amenities / facilities (not further specified)                             | 3%  |
| No licence   | 3%  | Safety (general)   | 3%  |
|  |     | Fauna/native animals   | 3%  |
|  |     | Flora/native trees, plants and flowers                                     | 3%  |
|  |     | Not too crowded  | 3%  |
|  |     | Other accommodation (eg hostels, motels, etc)                              | 3%  |
|  |     | Campsites  | 3%  |
|  |     | Children playgrounds or play areas   | 3%  |
|  |     | Cafes or restaurants   | 3%  |
|  |     | Water / taps   | 3%  |

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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 48% | No additional facilities                               | 24% |
| Don't have the right equipment                         | 17% | Equipment hire / access to equipment                   | 14% |
| Don't have transport/no way to get there/accessibility | 11% | Scenery/ views (eg waterfalls)                         | 14% |
| Lack of local opportunities                            | 8%  | Toilets  | 14% |
| Cost of participating                                  | 8%  | Clean, well maintained environment                     | 12% |
| Have no one (including pets) to do this activity with  | 8%  | Boat ramp / boat access                                | 10% |
| Health problems  | 8%  | Good road conditions/accessibility                     | 8%  |
| Fatigue/lack of motivation                             | 8%  | Flat/cleared ground (wheelchair friendly) smooth water | 6%  |
| Bad weather (including rain or drought)                | 6%  | Safety (general)                                       | 6%  |
| Fear of getting injured                                | 5%  | Shelters   | 6%  |
| Not suitable for children/can't take children along    | 3%  | Completely unspoilt surroundings                       | 6%  |
| Age/getting old  | 3%  | Rest areas/seats/picnic tables                         | 6%  |
| No experience/skilled                                  | 2%  | Jetty  | 4%  |
|  |     | Access to emergency services                           | 4%  |
|  |     | Parking  | 4%  |
|  |     | Not too crowded  | 4%  |
|  |     | Isolation / infrequent to no contact with other people | 4%  |
|  |     | BBQs and other food preparation areas                  | 4%  |
|  |     | Amenities / facilities (not further specified)         | 2%  |
|  |     | Instructors / coaches / training                       | 2%  |
|  |     | Shade  | 2%  |
|  |     | Campsites  | 2%  |
|  |     | Guided tours/audioguides                               | 2%  |
|  |     | Information boards                                     | 2%  |
|  |     | Cleared paths or trails through the bush (unsealed)    | 2%  |

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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 42% | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 26% |
| Don't have the right equipment                         | 30% | No additional facilities   | 24% |
| Cost of participating                                  | 15% | Cleared paths or trails through the bush (unsealed)                        | 21% |
| Restrictions on activity                               | 12% | Safety (general)   | 18% |
| Lack of local opportunities                            | 9%  | Completely unspoilt surroundings   | 9%  |
| Health problems  | 9%  | Good road conditions/accessibility   | 6%  |
| Cost of equipment required to do activity              | 6%  | Campsites  | 6%  |
| Don't have transport/no way to get there/accessibility | 6%  | Signage  | 6%  |
| Not suitable for children/can't take children along    | 3%  | Rest areas/seats/picnic tables   | 6%  |
| Not fit enough to do this activity                     | 3%  | Toilets  | 6%  |
| Fear of getting injured                                | 3%  | Increased opening times  | 3%  |
| No experience/skilled                                  | 3%  | Separate wide paths away from traffic/cycles                               | 3%  |
|  |     | Amenities / facilities (not further specified)                             | 3%  |
|  |     | Equipment hire / access to equipment                                       | 3%  |
|  |     | Garbage bins   | 3%  |
|  |     | Trees  | 3%  |
|  |     | Leafy background   | 3%  |
|  |     | Flora/native trees, plants and flowers                                     | 3%  |
|  |     | Lookouts   | 3%  |
|  |     | Cafes or restaurants   | 3%  |
|  |     | Sealed paths or boardwalks   | 3%  |
|  |     | Water / taps   | 3%  |

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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 56% | Information boards                                     | 27% |
| Unaware of local opportunities to do activity          | 28% | Aboriginal heritage sites                              | 22% |
| Lack of local opportunities                            | 12% | Guided tours/audioguides                               | 16% |
| Cost of participating                                  | 8%  | No additional facilities                               | 14% |
| Don't have transport/no way to get there/accessibility | 6%  | Signage  | 9%  |
| Transport costs (including petrol or public transport) | 3%  | Brochures or maps/online info/promotion                | 8%  |
| Have no one (including pets) to do this activity with  | 3%  | Toilets  | 8%  |
| Too busy doing other recreational activities           | 3%  | Clean, well maintained environment                     | 6%  |
| Fatigue/lack of motivation                             | 3%  | Completely unspoilt surroundings                       | 6%  |
| Health problems  | 1%  | Good road conditions/accessibility                     | 6%  |
| Age/getting old  | 1%  | Scenery/ views (eg waterfalls)                         | 5%  |
| Lack of variety/bored with local opportunities         | 1%  | Parking  | 4%  |
| Only do this when travelling                           | 1%  | Other  | 3%  |
| Cannot take pets along                                 | 1%  | Visitors' centre                                       | 3%  |
| No experience/skilled                                  | 1%  | Sealed paths or boardwalks                             | 3%  |
| Lack of occasions/invitations presenting (external)    | 1%  | Cleared paths or trails through the bush (unsealed)    | 3%  |
| Accommodation  | 1%  | Rest areas/seats/picnic tables                         | 3%  |
| Need to organise                                       | 1%  | Amenities / facilities (not further specified)         | 1%  |
|  |     | Garbage bins   | 1%  |
|  |     | Trees  | 1%  |
|  |     | Fauna/native animals                                   | 1%  |
|  |     | Historic heritage sites                                | 1%  |
|  |     | Other people present (fellow recreationists)           | 1%  |
|  |     | Isolation / infrequent to no contact with other people | 1%  |
|  |     | Powered campsites                                      | 1%  |
|  |     | Cafes or restaurants                                   | 1%  |

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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 68% | Scenery/ views (eg waterfalls)                         | 29% |
| Cost of participating                                  | 11% | Toilets  | 18% |
| Transport costs (including petrol or public transport) | 9%  | No additional facilities                               | 13% |
| Don't have transport/no way to get there/accessibility | 9%  | Information boards                                     | 13% |
| Lack of local opportunities                            | 7%  | Parking  | 10% |
| Have no one (including pets) to do this activity with  | 7%  | Rest areas/seats/picnic tables                         | 10% |
| Health problems  | 7%  | Completely unspoilt surroundings                       | 9%  |
| Unaware of local opportunities to do activity          | 3%  | Historic heritage sites                                | 9%  |
| Age/getting old  | 3%  | Good road conditions/accessibility                     | 9%  |
| Fatigue/lack of motivation                             | 2%  | Safety (general)                                       | 8%  |
| Only do this when travelling                           | 2%  | Lookouts   | 8%  |
| Too busy doing other recreational activities           | 2%  | Signage  | 8%  |
| Lack of variety/bored with local opportunities         | 2%  | Sealed paths or boardwalks                             | 7%  |
| Fear of getting injured                                | 1%  | BBQs and other food preparation areas                  | 7%  |
| Traffic  | 1%  | Shelters   | 6%  |
| Lack of occasions/invitations presenting (external)    | 1%  | Cafes or restaurants                                   | 6%  |
|  |     | Shops or kiosks  | 5%  |
|  |     | Water / taps   | 5%  |
|  |     | Clean, well maintained environment                     | 4%  |
|  |     | Amenities / facilities (not further specified)         | 3%  |
|  |     | Trees  | 3%  |
|  |     | Visitors' centre                                       | 3%  |
|  |     | Garbage bins   | 2%  |
|  |     | Hand rails/fence                                       | 2%  |
|  |     | Cleared paths or trails through the bush (unsealed)    | 2%  |
|  |     | Equipment hire / access to equipment                   | 1%  |
|  |     | Fauna/native animals                                   | 1%  |
|  |     | Isolation / infrequent to no contact with other people | 1%  |
|  |     | Brochures or maps/online info/promotion                | 1%  |
|  |     | Flat/cleared ground (wheelchair friendly)              | 1%  |
|  |     | Smooth water   | 1%  |
|  |     | Ease restrictions                                      | 1%  |
|  |     | Garden   | 1%  |
|  |     | Leafy background                                       | 1%  |
|  |     | Flora/native trees, plants and flowers                 | 1%  |
|  |     | Public transport                                       | 1%  |
|  |     | Swimming areas   | 1%  |
|  |     | Not too crowded  | 1%  |
|  |     | Guided tours/audioguides                               | 1%  |
|  |     | Children playgrounds or play areas                     | 1%  |

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

| Barriers   | %   | Preferences   | %   |
|--|-----|---|-----|
| Lack of time   | 79% | No additional facilities                            | 44% |
| Unaware of local opportunities to do activity          | 21% | Brochures or maps/online info/promotion             | 13% |
| Cost of participating                                  | 3%  | Flora/native trees, plants and flowers              | 11% |
| Have no one (including pets) to do this activity with  | 3%  | Trees   | 8%  |
| Too busy doing other recreational activities           | 3%  | Clean, well maintained environment                  | 7%  |
| Age/getting old  | 3%  | Cleared paths or trails through the bush (unsealed) | 7%  |
| Lack of local opportunities                            | 1%  | Equipment hire / access to equipment                | 6%  |
| Not suitable for children/can't take children along    | 1%  | Garbage bins  | 6%  |
| Health problems  | 1%  | Completely unspoilt surroundings                    | 6%  |
| Don't have transport/no way to get there/accessibility | 1%  | Toilets   | 6%  |
| Not fit enough to do this activity                     | 1%  | Fauna/native animals                                | 4%  |
| Fatigue/lack of motivation                             | 1%  | Scenery/ views (eg waterfalls)                      | 4%  |
|  |     | Other people present (fellow recreationists)        | 4%  |
|  |     | Water / taps  | 4%  |
|  |     | Instructors / coaches / training                    | 3%  |
|  |     | Ranger / management presence                        | 3%  |
|  |     | Signage   | 3%  |
|  |     | Sealed paths or boardwalks                          | 3%  |
|  |     | Rest areas/seats/picnic tables                      | 3%  |
|  |     | Increased opening times                             | 1%  |
|  |     | Amenities / facilities (not further specified)      | 1%  |
|  |     | Shade   | 1%  |
|  |     | Historic heritage sites                             | 1%  |
|  |     | Lookouts  | 1%  |
|  |     | Public transport                                    | 1%  |
|  |     | Parking   | 1%  |
|  |     | Information boards                                  | 1%  |
|  |     | Cafes or restaurants                                | 1%  |
|  |     | Shops or kiosks                                     | 1%  |



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

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 58% | Cleared paths or trails through the bush (unsealed)    | 56% |
| Fatigue/lack of motivation   | 18% | Scenery/ views (eg waterfalls)                         | 12% |
| Bad weather (including rain or drought)                            | 12% | No additional facilities                               | 11% |
| Lack of local opportunities  | 12% | Rest areas/seats/picnic tables                         | 9%  |
| Health problems  | 8%  | Sealed paths or boardwalks                             | 8%  |
| Poor quality/maintenance of roads/paths; no suitable walking paths | 6%  | Safety (general)                                       | 6%  |
| Fear of getting injured  | 5%  | Trees  | 6%  |
| Not fit enough to do this activity                                 | 4%  | Toilets  | 6%  |
| Traffic  | 4%  | Flora/native trees, plants and flowers                 | 5%  |
| No lighting/dark when i want                                       | 4%  | Water / taps   | 5%  |
| Too busy doing other recreational activities                       | 3%  | Completely unspoilt surroundings                       | 5%  |
| Location is too crowded  | 2%  | Fauna/native animals                                   | 3%  |
| Age/getting old  | 2%  | Signage  | 3%  |
| Safety concerns  | 2%  | Shade  | 2%  |
| Seasonal/prefer warmer weather                                     | 2%  | Parking  | 2%  |
| Unaware of local opportunities to do activity                      | 1%  | Good road conditions/accessibility                     | 2%  |
| Fear of wildlife / getting bitten/stung etc                        | 1%  | Separate wide paths away from traffic/cycles           | 2%  |
|  |     | Flat/cleared ground (wheelchair friendly) smooth water | 2%  |
|  |     | Lighting   | 2%  |
|  |     | Brochures or maps/online info/promotion                | 2%  |
|  |     | More restrictions                                      | 1%  |
|  |     | Ease restrictions                                      | 1%  |
|  |     | Amenities / facilities (not further specified)         | 1%  |
|  |     | Clean, well maintained environment                     | 1%  |
|  |     | Garbage bins   | 1%  |
|  |     | Historic heritage sites                                | 1%  |
|  |     | Public transport                                       | 1%  |
|  |     | Information boards                                     | 1%  |
|  |     | Cafes or restaurants                                   | 1%  |

**Table 32. Barriers and preferences - Water sports**

| Barriers   | %   | Preferences  | %   |
|--|-----|--|-----|
| Lack of time   | 55% | No additional facilities   | 17% |
| Bad weather (including rain or drought)                | 35% | Toilets  | 14% |
| Lack of local opportunities                            | 9%  | Beach/sandy areas  | 13% |
| Fatigue/lack of motivation                             | 7%  | Completely unspoilt surroundings   | 12% |
| Not suitable for children/can't take children along    | 4%  | Swimming areas   | 12% |
| Health problems  | 3%  | Clean, well maintained environment   | 11% |
| Have no one (including pets) to do this activity with  | 3%  | Safety (general)   | 10% |
| Not fit enough to do this activity                     | 3%  | Parking  | 9%  |
| Too busy doing other recreational activities           | 3%  | Showers  | 7%  |
| No experience/skilled                                  | 3%  | Access to emergency services   | 6%  |
| Unaware of local opportunities to do activity          | 2%  | Scenery/ views (eg waterfalls)   | 6%  |
| Fear of wildlife / getting bitten/stung etc            | 2%  | Equipment hire / access to equipment                                       | 5%  |
| Transport costs (including petrol or public transport) | 1%  | Fauna/native animals   | 5%  |
| Cost of equipment required to do activity              | 1%  | Good road conditions/accessibility   | 5%  |
| Cost of participating                                  | 1%  | Variety of terrain/ interesting/ challenging terrain/ obstacles/ jumps etc | 4%  |
| Don't have the right equipment                         | 1%  | Flora/native trees, plants and flowers                                     | 4%  |
| Don't have transport/no way to get there/accessibility | 1%  | Ranger / management presence   | 4%  |
| Fear of getting injured                                | 1%  | Change rooms   | 4%  |
| Age/getting old  | 1%  | BBQs and other food preparation areas                                      | 3%  |
| Pollution  | 1%  | Boat ramp / boat access  | 2%  |
| Need shade   | 1%  | Shelters   | 2%  |
|  |     | Public transport   | 2%  |
|  |     | Signage  | 2%  |
|  |     | Children playgrounds or play areas   | 2%  |
|  |     | Cleared paths or trails through the bush (unsealed)                        | 2%  |
|  |     | Water / taps   | 2%  |
|  |     | Rest areas/seats/picnic tables   | 2%  |
|  |     | Instructors / coaches / training   | 2%  |
|  |     | Shade  | 2%  |
|  |     | Trees  | 2%  |
|  |     | Historic heritage sites  | 2%  |
|  |     | Isolation / infrequent to no contact with other people                     | 2%  |
|  |     | Information boards   | 2%  |
|  |     | Events   | 1%  |
|  |     | Flat/cleared ground (wheelchair friendly) smooth water                     | 1%  |
|  |     | Ease restrictions  | 1%  |
|  |     | Amenities / facilities (not further specified)                             | 1%  |
|  |     | Jetty  | 1%  |
|  |     | Powered campsites  | 1%  |
|  |     | Cafes or restaurants   | 1%  |
|  |     | Shops or kiosks  | 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 |       |
| Attending outdoor concerts/music festivals          | 29%   | 40%   | 0%    | 50%   | 67%    | 38%   | 15%   | 39%   | 37%   |
| Visiting Aboriginal & other cultural heritage sites | 50%   | 0%    | 33%   | 26%   | 100%   | 36%   | 57%   | 25%   | 35%   |
| Cycling on a sealed bike path or track              | 0%    | 33%   | 17%   | 30%   | 29%    | 50%   | 22%   | 17%   | 24%   |
| Horse riding  | 0%    | 100%  |       | 18%   | 20%    | 100%  | 0%    | 33%   | 23%   |
| Volunteer work for the environment                  | 33%   | 33%   | 0%    | 21%   | 57%    | 0%    | 0%    | 17%   | 22%   |
| Snow sports   | 25%   | 40%   | 0%    | 10%   | 40%    | 0%    | 33%   | 0%    | 21%   |
| Cycling on roads or footpaths for recreation        | 30%   | 0%    | 0%    | 22%   | 20%    | 0%    | 38%   | 20%   | 19%   |
| Rock climbing, abseiling, caving or canyoning       | 25%   | 33%   | 100%  | 0%    | 14%    | 33%   | 0%    | 0%    | 17%   |
| Bushwalking for <2 hrs                              | 0%    | 40%   | 14%   | 11%   | 13%    | 0%    | 20%   | 7%    | 11%   |
| Nature study  | 0%    | 0%    | 0%    | 17%   | 33%    | 0%    | 0%    | 10%   | 10%   |
| Water sports  | 0%    | 0%    | 0%    | 14%   | 29%    | 13%   | 0%    | 15%   | 10%   |
| Running or jogging outdoors                         | 17%   | 0%    | 0%    | 0%    | 33%    | 0%    | 0%    | 14%   | 10%   |
| Sports involving motorised watercraft               | 25%   | 25%   | 0%    | 10%   | 0%     | 0%    | 0%    | 0%    | 10%   |
| Mountain biking                                     | 20%   | 0%    | 0%    | 20%   | 14%    | 0%    | 0%    | 0%    | 9%    |
| Visiting landmarks, lookouts and scenery            | 0%    | 0%    | 14%   | 3%    | 25%    | 9%    | 0%    | 14%   | 9%    |
| Trail bike or quad bike riding                      | 14%   | 0%    | 20%   | 0%    | 50%    | 0%    | 0%    | 0%    | 9%    |
| Hiking with overnight camping                       | 0%    | 25%   | 0%    | 13%   | 50%    | 0%    | 0%    | 0%    | 8%    |
| Walking on roads or footpaths for recreation        | 0%    | 0%    | 0%    | 0%    | 0%     | 0%    | 20%   | 15%   | 8%    |
| Sports involving non-motorised watercraft           | 17%   | 0%    | 14%   | 8%    | 0%     | 0%    | 13%   | 0%    | 7%    |
| Fishing   | 0%    | 17%   | 8%    | 10%   | 14%    | 0%    | 0%    | 0%    | 7%    |
| Bushwalking for 2+ hrs, but not overnight           | 0%    | 0%    | 0%    | 6%    | 0%     | 0%    | 0%    | 11%   | 5%    |
| Picnicking  | 0%    | 0%    | 0%    | 5%    | 0%     | 0%    | 14%   | 4%    | 3%    |
| Four-wheel driving                                  | 0%    | 33%   | 0%    | 0%    | 0%     | 0%    | 0%    | 0%    | 2%    |
| Car camping   | 0%    | 0%    | 0%    | 9%    | 0%     | 0%    | 0%    | 0%    | 2%    |
| Scenic driving with a car or motorbike              | 0%    | 17%   | 0%    | 0%    | 0%     | 0%    | 0%    | 0%    | 1%    |

\* 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 | 8.3  | 8.4  | 8.1   | 7.9  | 7.9   | 6.9  | 7.0   | 7.0   | 6.9  | 5.9   |
| Bushwalking for <2 hrs                       | 8.4  | 8.4  | 8.1   | 8.1  | 8.2   | 7.3  | 7.2   | 7.4   | 7.2  | 6.3   |
| Bushwalking for 2+ hrs, but not overnight    | 8.5  | 8.4  | 8.3   | 8.1  | 8.3   | 7.7  | 7.3   | 7.8   | 7.8  | 6.7   |
| Hiking with overnight camping                | 8.9  | 8.9  | 8.8   | 8.3  | 8.5   | 8.1  | 7.3   | 7.4   | 8.3  | 6.8   |
| Running or jogging outdoors                  | 8.4  | 8.6  | 8.2   | 7.9  | 8.5   | 7.0  | 6.7   | 6.9   | 7.6  | 6.2   |
| Cycling on roads or footpaths for recreation | 8.6  | 8.8  | 8.3   | 8.1  | 8.5   | 7.2  | 6.9   | 7.0   | 7.6  | 6.2   |
| Cycling on a sealed bike path or track       | 8.6  | 8.8  | 8.3   | 7.9  | 8.3   | 7.1  | 6.9   | 6.9   | 7.5  | 6.0   |
| Mountain biking                              | 8.6  | 8.6  | 8.3   | 8.0  | 8.6   | 7.5  | 6.9   | 7.0   | 7.9  | 6.6   |
| Picnicking                                   | 8.3  | 8.4  | 8.1   | 7.8  | 7.9   | 7.0  | 6.9   | 7.1   | 7.0  | 6.0   |
| Car camping                                  | 8.9  | 8.8  | 8.6   | 8.5  | 8.7   | 7.8  | 7.4   | 7.5   | 8.1  | 6.8   |
| Snow sports                                  | 8.3  | 8.7  | 8.2   | 8.1  | 8.7   | 7.1  | 6.8   | 6.9   | 8.0  | 6.3   |
| Water sports                                 | 8.4  | 8.5  | 8.1   | 7.8  | 8.1   | 6.9  | 6.8   | 6.9   | 7.1  | 6.0   |
| Sports involving motorised watercraft        | 8.4  | 8.6  | 8.4   | 7.8  | 8.5   | 7.1  | 6.3   | 6.3   | 7.8  | 6.2   |

|   |     |     |     |     |     |     |     |     |     |     |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Sports involving non-motorised watercraft           | 8.8 | 8.7 | 8.4 | 8.1 | 8.6 | 7.5 | 7.2 | 7.1 | 8.0 | 6.4 |
| Scenic driving with a car or motorbike              | 8.3 | 8.4 | 8.1 | 7.9 | 7.8 | 7.1 | 7.0 | 7.1 | 6.9 | 5.9 |
| Four-wheel driving                                  | 8.3 | 8.6 | 8.5 | 7.8 | 8.5 | 7.4 | 6.7 | 7.0 | 7.9 | 6.7 |
| Trail bike or quad bike riding                      | 8.2 | 8.4 | 8.3 | 7.6 | 7.9 | 6.8 | 6.3 | 6.4 | 7.6 | 6.4 |
| Rock climbing, abseiling, caving or canyoning       | 8.6 | 8.6 | 8.7 | 8.0 | 8.6 | 7.6 | 6.9 | 7.0 | 8.2 | 6.6 |
| Visiting landmarks, lookouts and scenery            | 8.3 | 8.4 | 8.1 | 7.9 | 7.9 | 7.1 | 7.1 | 7.2 | 7.0 | 6.0 |
| Visiting Aboriginal & other cultural heritage sites | 8.7 | 8.5 | 8.4 | 8.3 | 8.1 | 7.6 | 8.0 | 7.8 | 7.5 | 6.5 |
| Nature study  | 8.7 | 8.5 | 8.2 | 8.2 | 8.2 | 7.4 | 7.5 | 7.8 | 7.3 | 6.6 |
| Volunteer work for the environment                  | 8.5 | 8.6 | 8.3 | 8.2 | 8.3 | 7.7 | 7.5 | 7.6 | 7.1 | 6.7 |
| Attending outdoor concerts/music festivals          | 8.3 | 8.4 | 8.1 | 7.8 | 8.1 | 7.3 | 7.1 | 7.2 | 7.5 | 6.3 |
| Fishing   | 8.3 | 8.6 | 8.3 | 7.9 | 8.2 | 7.3 | 6.7 | 6.9 | 7.5 | 6.0 |
| Horse riding  | 8.4 | 8.6 | 8.7 | 8.4 | 8.2 | 7.4 | 6.9 | 7.8 | 7.9 | 6.6 |

\* 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 | 9.0  | 8.8  | 8.6   | 8.5  | 8.5   | 7.4  | 7.3   | 7.4   | 7.2  | 6.7   |
| Bushwalking for <2 hrs                       | 9.5  | 9.0  | 9.0   | 9.0  | 8.9   | 8.0  | 8.2   | 8.4   | 8.1  | 7.2   |
| Bushwalking for 2+ hrs, but not overnight    | 9.4  | 9.1  | 9.0   | 9.0  | 8.9   | 8.9  | 8.2   | 8.7   | 8.9  | 7.9   |
| Hiking with overnight camping                | 9.3  | 8.7  | 8.9   | 8.8  | 8.7   | 8.7  | 7.5   | 8.3   | 8.6  | 7.5   |
| Running or jogging outdoors                  | 9.3  | 9.1  | 8.8   | 8.4  | 9.2   | 6.9  | 7.1   | 7.4   | 8.2  | 7.1   |
| Cycling on roads or footpaths for recreation | 9.2  | 9.2  | 9.1   | 8.7  | 9.0   | 7.3  | 7.6   | 7.8   | 8.2  | 7.3   |
| Cycling on a sealed bike path or track       | 9.2  | 9.2  | 9.1   | 9.0  | 8.8   | 7.2  | 7.2   | 7.8   | 8.2  | 7.0   |
| Mountain biking                              | 8.8  | 9.0  | 9.1   | 8.3  | 8.4   | 7.8  | 7.0   | 6.9   | 8.3  | 6.8   |
| Picnicking                                   | 9.1  | 9.2  | 9.1   | 8.9  | 8.3   | 8.2  | 8.0   | 8.2   | 8.0  | 7.2   |
| Car camping                                  | 9.2  | 9.0  | 8.9   | 8.6  | 8.7   | 8.1  | 7.7   | 8.1   | 8.2  | 7.1   |
| Snow sports                                  | 8.4  | 8.9  | 8.6   | 8.1  | 8.9   | 7.1  | 6.9   | 7.3   | 8.0  | 6.2   |
| Water sports                                 | 8.8  | 8.8  | 8.7   | 8.1  | 8.4   | 7.1  | 6.7   | 7.1   | 7.9  | 6.5   |

|   |     |     |     |     |     |     |     |     |     |     |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Sports involving motorised watercraft               | 8.6 | 8.9 | 9.0 | 7.9 | 8.4 | 7.2 | 6.5 | 6.9 | 8.0 | 6.1 |
| Sports involving non-motorised watercraft           | 9.3 | 9.1 | 8.9 | 8.8 | 9.1 | 8.1 | 7.5 | 7.8 | 8.8 | 7.7 |
| Scenic driving with a car or motorbike              | 9.1 | 9.0 | 8.6 | 8.8 | 8.3 | 8.1 | 7.8 | 7.9 | 7.7 | 6.7 |
| Four-wheel driving                                  | 8.8 | 9.3 | 8.5 | 8.4 | 8.0 | 8.2 | 7.3 | 7.7 | 8.6 | 7.5 |
| Trail bike or quad bike riding                      | 8.0 | 8.9 | 8.7 | 7.8 | 7.8 | 7.1 | 6.3 | 6.3 | 7.8 | 6.1 |
| Rock climbing, abseiling, caving or canyoning       | 9.1 | 9.4 | 8.7 | 8.2 | 8.6 | 7.2 | 6.9 | 7.5 | 9.2 | 6.9 |
| Visiting landmarks, lookouts and scenery            | 9.2 | 9.1 | 8.7 | 8.8 | 8.7 | 8.3 | 8.0 | 8.3 | 8.2 | 6.9 |
| Visiting Aboriginal & other cultural heritage sites | 9.7 | 9.3 | 9.4 | 8.9 | 8.7 | 8.9 | 9.2 | 8.9 | 8.8 | 7.9 |
| Nature study  | 9.4 | 9.1 | 8.9 | 8.8 | 8.5 | 8.7 | 8.3 | 9.1 | 8.3 | 7.5 |
| Volunteer work for the environment                  | 9.3 | 8.8 | 9.0 | 8.9 | 8.5 | 8.4 | 7.9 | 8.5 | 8.4 | 7.9 |
| Attending outdoor concerts/music festivals          | 8.7 | 8.7 | 8.4 | 8.0 | 8.4 | 7.3 | 7.2 | 6.9 | 7.5 | 6.0 |
| Fishing   | 8.8 | 8.7 | 8.7 | 8.2 | 8.5 | 7.6 | 6.9 | 7.6 | 8.3 | 6.9 |
| Horse riding  | 8.7 | 8.9 | 8.8 | 8.2 | 8.7 | 7.2 | 7.2 | 7.6 | 8.2 | 6.8 |

\* 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 Statistics<sup>3</sup>. This percentage was then applied as a weight to the 2009 population figures for South Coast to derive the 2018 estimated population.

### Forecasted population - Demographic approach

|        |       | 2009    | 2018 estimate | % increase |
|--------|-------|---------|---------------|------------|
| Male   | 18-24 | 19,059  | 19,868        | 4%         |
|        | 25-34 | 24,061  | 27,894        | 16%        |
|        | 35-44 | 29,800  | 30,981        | 4%         |
|        | 45-54 | 31,848  | 32,472        | 2%         |
|        | 55-64 | 28,027  | 31,939        | 14%        |
|        | 65-75 | 22,701  | 31,838        | 40%        |
| Female | 18-24 | 17,741  | 18,417        | 4%         |
|        | 25-34 | 24,772  | 28,175        | 14%        |
|        | 35-44 | 32,086  | 33,032        | 3%         |
|        | 45-54 | 33,213  | 34,042        | 2%         |
|        | 55-64 | 28,910  | 33,834        | 17%        |
|        | 65-75 | 23,895  | 33,262        | 39%        |
| Total  |       | 316,113 | 355,753       | 13%        |

<sup>3</sup> 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 | 40,140  | 44,490        | 11%        |
|        | 34-43 | 29,319  | 30,815        | 5%         |
|        | 44-53 | 32,403  | 32,822        | 1%         |
|        | 54-63 | 28,564  | 32,303        | 13%        |
|        | 64-73 | 21,501  | 29,655        | 38%        |
|        | 74-75 | 3,569   | 4,983         | 40%        |
| Female | 18-33 | 39,455  | 43,194        | 9%         |
|        | 34-43 | 31,578  | 32,782        | 4%         |
|        | 44-53 | 33,737  | 34,394        | 2%         |
|        | 54-63 | 29,378  | 34,015        | 16%        |
|        | 64-73 | 22,609  | 31,238        | 38%        |
|        | 74-75 | 3,860   | 5,180         | 34%        |
| Total  |       | 316,113 | 355,869       | 13%        |

### 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, 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 11<sup>th</sup> 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 57<sup>th</sup> along the line. As the activity has 70 participants, the highest possible level of future participation is that of the 64<sup>th</sup> 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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