

Natural England Commissioned Report NECR177

# Monitor of Engagement with the Natural Environment

Analysis of expenditure during visits

First published 24 February 2015

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# Foreword

Natural England commission a range of reports from external contractors to provide evidence and advice to assist us in delivering our duties. The views in this report are those of the authors and do not necessarily represent those of Natural England.

## Background

The Monitor of Engagement with the Natural Environment (MENE) survey provides trend and volumetric data on visits to the natural environment including high level analysis of spend associated with the visits. This report was commissioned to undertake further analysis of the spend data collected by MENE between 2009 and 2013. MENE data was also combined with data from the Great Britain Tourism Survey (GBTS) and International Passenger Survey (IPS) to provide a more holistic estimate of spend including by people who live outside of England and expenditure on overnight accommodation. The total from the three surveys are combined and adjusted to provide an estimated total annual expenditure of £27 billion.

The report analyses MENE data to understand the distribution of visitor spend including a broad sense of which trips are more likely to involve expenditure than others. It shows a wide variation in amounts spent during visits with 80% of money spent on just 10% of visits, 20% of expenditure on 16% of visits and with no expenditure during 74% of visits. The data is presented to illustrate the characteristics of the visits which involve spend and the visitors who made them. It reveals that certain types of visit and activities undertaken were more likely to involve higher levels of spend.

The large MENE sample size allowed analysis of expenditure during visits at a sub-national level.

Geographic analysis of the data was undertaken by region, Local Enterprise Partnership area and by county. The level of spend varied widely and for example when analysed by LEP spend is found to be highest in Cumbria, Dorset and Lincolnshire (Greater Lincolnshire LEP) but lowest in Hertfordshire, Tees Valley and Black Country LEPs.

The report enhances the current understanding of spend associated with visits to the natural environment and contributes to the debate about investing in open-air recreation and engagement with the natural environment.

Natural England will use the results to:

- Develop its work on improving opportunities for people to enjoy open air recreation and engage with the natural environment.
- Draw attention to the data we have with more detailed cross analysis and geographic breakdown.
- Provide a more holistic picture of the expenditure associated with outdoor recreation visits.

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### Further information

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# 1. Executive summary

Natural England commissioned this analysis to provide a better understanding of how money is spent during visits to the natural environment. This work will support Natural England's role to provide advice, and to keep under review matters relating to open-air recreation.

This analysis draws from the results of the Monitor of Engagement with the Natural Environment survey (MENE). MENE records expenditure during visits to the natural environment taken by residents of England to places in England. For the purposes of this survey *natural environment* means all green open spaces in and around towns and cities as well as the wider countryside and coastline while *visits* means time spent outdoors in the natural environment, away from home and private gardens. During these visits a wide range of activities may be undertaken ranging from informal recreation undertaken close to home, such as jogging or local dog walks, to longer day excursions and activities such as mountain biking and watersports.

The MENE survey only includes expenditure made *during* the visit. Therefore on visits taken during a holiday, spend on overnight accommodation is not included. Also while expenditure on items such as food, petrol and equipment made *during* the visit is recorded, spend on these items before/ in preparation for the visit is not included. Also, expenditure on items purchased but not consumed or used during the visit is included.

Data from the main tourism surveys, the Great Britain Tourism Survey (GBTS) and International Passenger Survey (IPS) relating to visits which include outdoor activities has also been used to provide a more holistic picture of expenditure during visits to the natural environment in England, including people who live outside of England and including expenditure on overnight accommodation. Further information on what the expenditure data collected in MENE tells us and the data needed to assess economic value and impact can be found in Appendix 5 of the MENE Technical Report<sup>1</sup>.

## Key findings

- On average residents of England take 2.7 billion visits to the natural environment per year. Money is spent during around a quarter of these visits (26%), with an average of £28 spent per visit.
- From MENE data it may be estimated that around £20 billion is spent per year during visits to the natural environment.
- Combining the results from the domestic and international tourism surveys it may be estimated that around £10 billion is spent during holidays taken to England involving outdoor pursuits (main pursuit in GBTS, undertaken at any point in IPS). Note that this includes all money spent during holidays which include an outdoor activity, including money spent on overnight accommodation, shopping, visiting attractions, etc, so is likely to be significantly more than the true value of expenditure attributable to visits to the natural environment.

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<sup>1</sup> <https://www.gov.uk/government/collections/monitor-of-engagement-with-the-naturalenvironment-survey-purpose-and-results>

- Due to overlaps in the visits recorded by MENE and GBTS, the totals from the three surveys cannot simply be added together – any holistic analysis must first remove the £3 billion included in both surveys. Following this approach it may be estimated that a total of **£27 billion** is spent per year during visits to the natural environment.
- From MENE we see a significant variation in how much is spent during visits to the natural environment – spend increases significantly by distance travelled from home. Spend during visits is also directly related to frequency of visit taking with those people who take the most visits typically spending much less per visit.
- 80% of expenditure during visits to the natural environment takes place during 10% of visits.
- Visits which involve the highest average expenditure (average of data including visits with zero spend) are likely to be taken by car, with a destination some distance from home. They are more likely to take place on the coast or another scenic location such as mountains or moorland. They are likely to be motivated by the need to relax and unwind and spend time with family or friends.
- In contrast, visits which involve the lowest average expenditure (average of data including visits with zero spend) are more likely to be taken in urban locations such as parks and to be motivated by the desire to entertain children.
- Visits which involve no expenditure are most often taken for dog walking purposes or for personal exercise. They are usually taken regularly and close to home.

## Implications

MENE provides high level analysis of spend which takes place during visits to the Natural Environment including a broad sense of which trips are more likely to involve expenditure than others.

## 2. Introduction

Natural England commissioned this analysis to provide a better understanding of how money is spent during visits to the natural environment.

The analysis is largely based on data from Natural England's Monitor of Engagement with the Natural Environment, supplemented by data from the Great Britain Tourism Survey (GBTS) and International Passenger Survey (IPS) to provide a more complete picture.

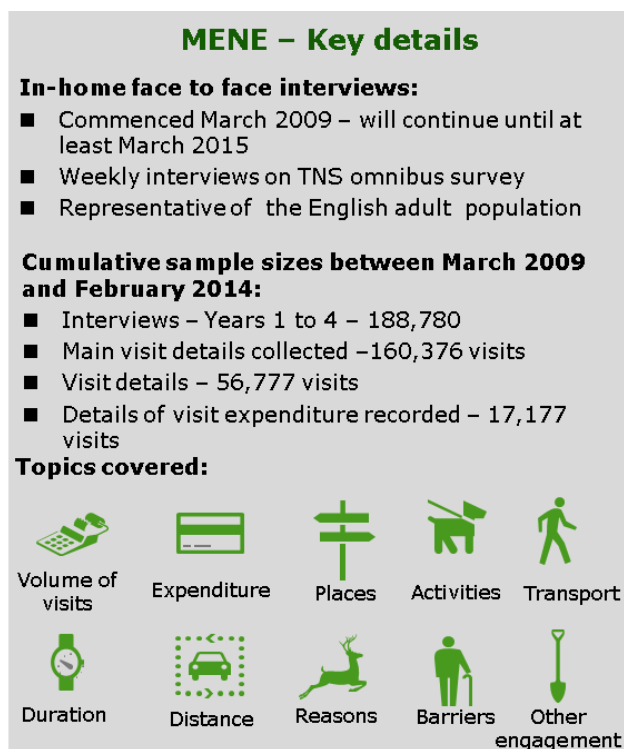
### 2.1 Sources

This report contains the result of an analysis of data from the Monitor of Engagement with the Natural Environment (MENE).

This analysis has used data from the first four years of MENE surveying from March 2009 to February 2013. During this period some 188,780 interviews were undertaken with adults aged 16 and over living in England, recording details of visits taken to the natural environment in the previous 7 days. A sub-sample of 17,177 of these respondents provided details on whether they spent any money during the visit and how much was spent.

The MENE technical report includes further details on the survey methods, approaches taken to weight and gross up the survey data to produce annual estimates and the accuracy of data (<https://www.gov.uk/government/collections/monitor-of-engagement-with-the-natural-environment-survey-purpose-and-results>).

Figure 1 – MENE – key details





MENE records details of visits to the natural environment taken to places in England by residents of England, this includes excursions from a holiday base.

To provide a more complete picture, data from the two main UK tourism monitors , the Great Britain Tourism Survey (GBTS) and International Passenger Survey (IPS) have been used to obtain estimates of expenditure during visits to the natural environment taken in England by visitors from other parts of the UK and overseas. The data from these surveys has also been used to obtain estimates of the amounts spent on overnight accommodation during visits taken in England which included outdoor recreation.

## 2.2 Definitions

MENE records the incidence and details of visits taken to the natural environment by adults living in England. For the purposes of this survey *natural environment* means all green open spaces in and around towns and cities as well as the wider countryside and coastline while *visits* means time spent outdoors in the natural environment, away from home and private gardens.

Expenditure during visits is recorded using the questions below. These questions record any expenditure made at any point *during the visit*. Therefore on visits taken during a holiday, spend on overnight accommodation is not included. Also while expenditure on items such as food, petrol, equipment or clothing made *during* the visit is recorded, spend on these items *before or in preparation* for the visit is not included. Also, expenditure on items purchased but not consumed or used during the visit is included. Further information on what the expenditure data collected in MENE tells us and the data needed to assess economic value and impact can be found in Appendix 5 of the MENE Technical Report<sup>2</sup>.

### **Q15 During this visit , did you personally spend any money on any of the items listed on the screen? PROBE Any others?**

Food and drink  
Petrol\diesel\LPG  
Car parking  
Bus\train\ferry fares  
Hire of equipment  
Purchase of equipment  
Maps\guidebooks\leaflets  
Gifts\souvenirs  
Admission fees  
Other items  
Didn't spend any money

### **Q16 How much did you spend on... ASKED FOR THOSE SELECTED AT Q17**

Food and drink \_\_\_\_\_  
Petrol\diesel\LPG \_\_\_\_\_  
Car parking \_\_\_\_\_  
Bus\train\ferry fares \_\_\_\_\_  
Hire of equipment \_\_\_\_\_  
Purchase of equipment \_\_\_\_\_  
Maps\guidebooks\leaflets \_\_\_\_\_  
Gifts\souvenirs \_\_\_\_\_  
Admission fees \_\_\_\_\_  
Other items \_\_\_\_\_

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<sup>2</sup> <https://www.gov.uk/government/collections/monitor-of-engagement-with-the-naturalenvironment-survey-purpose-and-results>

Data from the Great Britain Tourism Survey (2012) and International Passenger Survey (2011) have also been used to obtain estimates of expenditure during visits taken by overnight visitors which include outdoor recreation activities in places in England.

When using the data from these surveys, visits included have been defined on the basis of participation in specified activities as listed in Table 1. Using the GBTS data, expenditure during visits taken with a destination in England where an outdoor pursuit was the main activity undertaken have been included within the analysis scope. Using the IPS data, expenditure during visits involving any participation, whether or not this was the main activity undertaken, is included (IPS does not record main activity undertaken). For both surveys all expenditure made during these visits is included, including overnight accommodation.

**Table 1 – Activities used to define outdoor recreation visits included in GBTS and IPS surveys**

<p><b>GBTS</b></p> <p><i>Single main activity undertaken by GB residents on overnight visits taken in England</i></p>	<p>Visiting country park          Visiting garden          Visiting wildlife attraction/ nature reserve          Visiting beach          Taking part in outdoor sports          Short walk/ stroll          Long walk, hike or ramble          Centre based walking          Organised adventure, sports          Watersports          Fishing          Horse riding, pony trekking          Field sports          Watching wildlife          Bird watching          Running          Cycling/ mountain biking          Picnic</p>
<p><b>IPS</b></p> <p><i>Activities undertaken at any point during visits taken by overseas visitors to England (not necessarily main activity)</i></p>	<p>Visits to countryside, villages          Visits to coast or beach</p>

### 2.3 Accuracy of results

Note that, as with any sample survey, the results from MENE, GBTS and IPS have associated margins or error.

These margins of error are larger when sample sizes are smaller. Therefore while the results shown in this report at the total level (ie all visits taken in England) are based on very large sample sizes so are very precise (generally within +/-1%), other results relating to smaller groups of visitors such as those undertaking niche activities or visiting specific types of location and sub-regional results have much wider margins of error.

Details of sample sizes and estimates of accuracy at the 95% levels of confidence are provided in the data relating to expenditure on visits to England's regions, local authorities and Local Enterprise Partnership areas as contained in Appendix 2.

## 2.4 Other potential data sources not used in this analysis

A number of other surveys record participation in outdoor recreation and/or visits taken to the natural environment in England. While these sources have not been used in this analysis, they could provide valuable wider context to the findings:

- *Great Britain Day Visits Survey* – this survey is commissioned by VisitEngland, VisitScotland and Visit Wales. Fieldwork has been undertaken every week since January 2011 to interview nationally representative samples of the GB population. The survey records the volume and details of 'same day' leisure visits including expenditure details. Questions on activities undertaken and places visited allow outdoor recreation visits to be identified.

However, reflecting the needs of the survey's sponsors, only visits which fit within the definition of a Tourism Day Visit are recorded ie lasting at least 3 hours in duration. As such, given the significant volumes of visits to the natural environment which are of a shorter duration than 3 hours, data from this survey has not been used in this report.

- *Active People Survey* – this survey is commissioned by Sport England. It has continuously tracked levels of participation in sport since 2005 including walking undertaken for recreational or health purposes.

However data from this survey has not been used in the analysis undertaken for this report as no information is collected on expenditure. Also the survey does not record details on the types of places included in walks making it difficult to separately report upon visits taken in the natural environment.

Other surveys recording visit taking by members of the English population to specific types of destination in the natural environment include the following:

- *Forestry Commission – Public Opinion of Forestry Survey* – a biennial omnibus survey of the UK population which records participation in visits and opinions towards forestry related issues.
- *Canal & River Trust – Inland Waterway Visitor Survey (previously British Waterways)* – a survey of the English population which records the volume and characteristics of visits taken to waterways managed by CRT.
- *National Trust – Brand Perceptions Tracker* – a continuous survey which measures awareness and perceptions of the Trust, effectiveness of marketing campaigns and volumes of visits taken to the places they manage.
- *National Trust Visitor Survey* – a face to face survey of visitors at National Trust properties.

These surveys have not been included in the analysis presented in this report as the other sources used (MENE, GBTS and IPS) already provide coverage of visits taken to forests, inland waterway and the natural places managed by the National Trust.

### 3. Main results

#### 3.1 Expenditure during visits to the natural environment

During the first four years of MENE (March 2009 to February 2013), the English adult population (aged 16 and over) took an average of 2.7 billion visits to the natural environment per year. However, frequency of visit taking varied greatly within the population with 11% of adults normally visiting the natural environment every day, 43% visiting less than daily but at least once a week, 37% visiting less often than this and 9% normally never taking any visits.

Money was spent during 26% of visits taken to the natural environment. As shown in Figure 2 below, money was most frequently spent on food and drink (purchased on 20% of visits), fuel (5% of visits) and car parking (4%).

An average of £28 was spent during visits which involved any expenditure. As shown in the chart below, for every £1 spent during visits to the natural environment, the largest proportions were spent on food and drink (53%), fuel (14%) and admission fees (10%).

**Figure 2 – Expenditure during visits to the natural environment - MENE March 2009 to February 2013**

#### Items purchased during visits



**Food and drink**

Bought during 20% of all visits



**Fuel**

Bought during 5% of all visits



**Car parking**

Bought during 4% of all visits



**Admission fees**

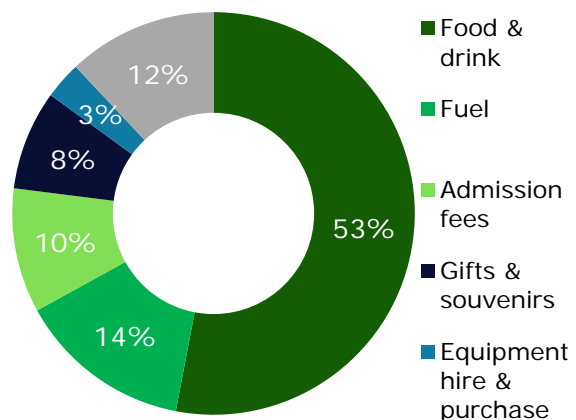
Bought during 3% of all visits



**Gifts and souvenirs**

Bought during 2% of all visits

#### Breakdown of total spend



### 3.2 Estimating total expenditure

Data from MENE may be used to obtain an estimate of total spend during visits to the natural environment by people who live in England to destinations in England. This data only includes expenditure made *during* visits taken to the natural environment so while it includes visits taken from a holiday base, it does not include expenditure on overnight accommodation. Also, expenditure on items purchased but not consumed or used during the visit is included. The data presented in this report does not include expenditure on items for visits that were spent before they were taken.

The Great Britain Tourism Survey (GBTS) records domestic overnight trips taken by GB residents. Using this data it is possible to produce an estimate of expenditure during the overnight visits taken to England by GB residents where outdoor pursuits were cited as being the main activity undertaken (see list of activities included in Table 1).

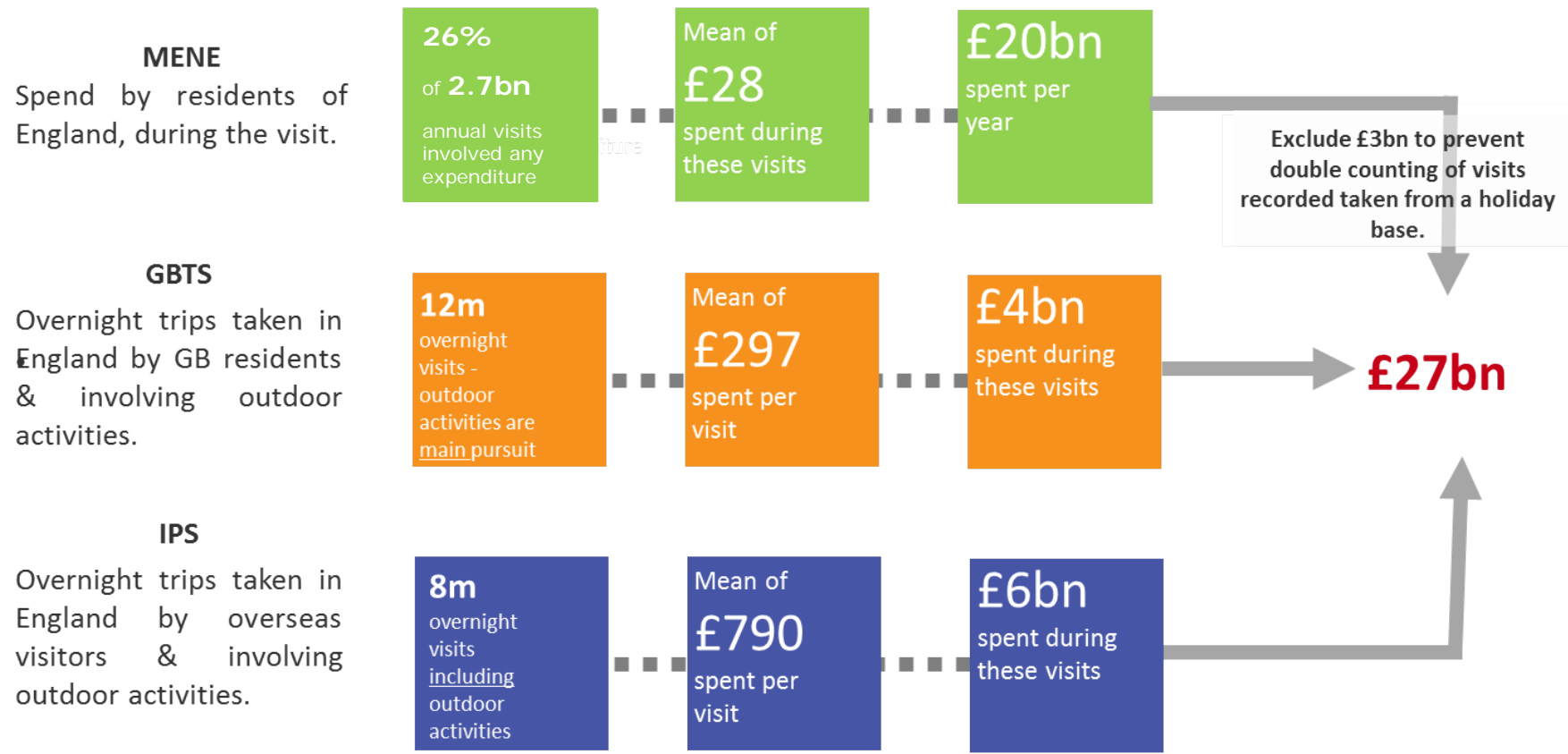
The International Passenger Survey (IPS) records visits taken to the UK from overseas. Using this data it is possible to produce an estimate of expenditure during the overnight visits taken by people from overseas which involved undertaking outdoor activities in England (see Table 1, note IPS does not record if these activities were the visitor's single main activity).

Importantly the spend figures obtained from GBTS and IPS do not represent the amount directly spent on outdoor activities but the broader amount spent in England by visitors who took part in these activities (ie the amount also includes spend on additional activities such as eating out and accommodation).

Figure 3 summarises the annual estimates of spend during visits derived from each of these sources and using these definitions of outdoor recreation visits. Note that there is some degree of double counting between the surveys as MENE includes expenditure on excursions to the natural environment taken by residents of England during holidays in England. This expenditure (estimated at around £3 billion) is also within the scope of the GBTS survey. The totals from the three surveys therefore cannot simply be added together – any holistic analysis would need to first remove the £3 billion included in both surveys which results in an estimated total of **£27 billion** of expenditure during visits to the natural environment.

Also note that the estimates from GBTS and IPS cover all expenditure during holidays. This could include expenditure unrelated to the outdoor activities undertaken including expenditure on other pursuits such as visiting attractions and eating out. Not all of the expenditure identified below through the GBTS and IPS can therefore be attributed to visits to the natural environment, and the estimates are likely to significantly overestimate the true amount of holiday expenditure attributable to visits to the natural environment.

**Figure 3 – Estimating expenditure during visits to the natural environment (MENE, GBTS and IPS data). Mean spend amounts exclude visits with zero spend**



The remainder of this report contains the results of a detailed analysis of the MENE data only, considering the distribution of the average £20 billion spent per year during visits to the natural environment.

### 3.3 Understanding the distribution of visit spend

MENE records that average (mean) spend during visits to the natural environment where any money is spent is £28. Including those visits with no expenditure in the analysis base, the average (mean) spend is £7.

However, as illustrated in Figure 4 below, the amounts spent during visits which include any expenditure vary significantly, from £2 or less spent during 14% (382 million) of visits to over £50 in a similar percentage of visits (13% or 365 million visits)<sup>3</sup>.

**Figure 4 – Total amount spent during visits which include any expenditure – MENE March 2009 to February 2013 (percentage of visits that involved expenditure within each of the bands shown)**



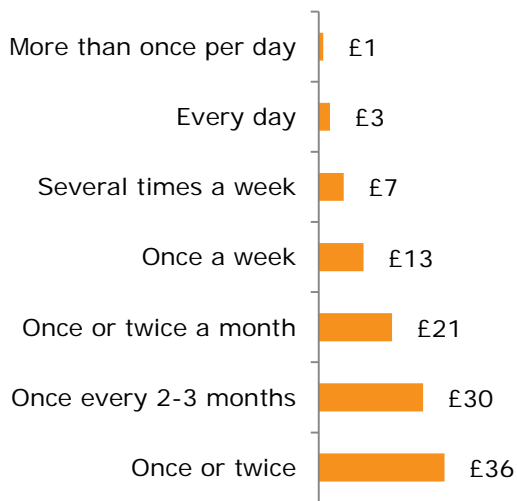
<sup>3</sup> In interpreting the results in Figure 4, note that any differences of 2 percentage points or more are statistically significant.

*Considering frequency of visit taking*

MENE records that around half of all visits taken to the natural environment (46%) are taken by the relatively small proportion of people (11% of the population) who normally take visits every day or more than once a day (note that MENE records both specific visit frequency in the last 7 days and general visit frequency in last 12 months).

However as shown in Figure 5 below, average spend (including zeros) during visits is lowest amongst those people who take visits most often. Therefore, it is estimated that just 17% of all visit expenditure is made by those people who take visits at least daily while people who normally take visits once a week or less often take 22% of all visits but contribute 53% of total expenditure.

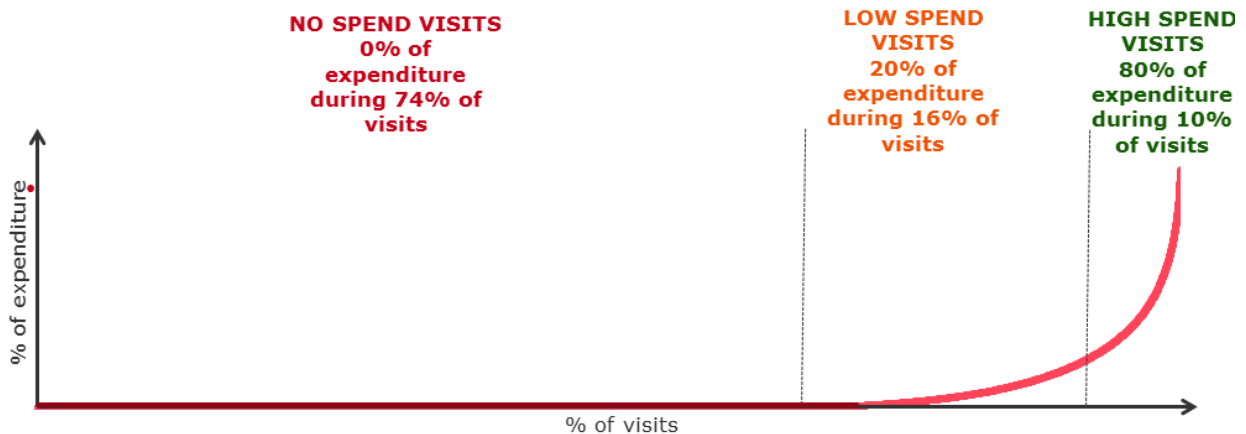
**Figure 5 – Average spend per visit by normal frequency of visit taking - MENE March 2009 to February 2013. Averages include visits with zero spend**



*Comparing visits by spend levels*

The wide variation in amounts spent during visits means that while there is no expenditure during 74% of visits, 20% of expenditure occurs in 16% of visits while 80% of all money is spent on just 10% of visits. To better understand the factors influencing how much is spent during visits, it is useful to compare the profile of visits and visit takers in each of these three expenditure bands, as summarised below.

**Figure 6 – Comparison of no spend, lower spend and higher spend visits - MENE March 2009 to February 2013<sup>4</sup>**



<sup>4</sup> Note: AB/ C1/ C2/ DE refer to social grading categories.



**Table 2 – Total volume of visits and total spend during visits**

	No spend visits Visits with no spend Base: 10,922 visits	Lower spend visits Visits with any spend excluding those defined as higher spend visits Base: 4,815 visits	Higher spend visits Highest spend visits representing 80% of expenditure Base: 1,440 visits
<b>Total volume of visits and total spend during visits</b>	2 billion visits per year (74% of all visits)  £0 spent during visits (0% of all money spent)	0.4 billion visits per year (16% of all visits)  £4 billion spent during visits (20% of all money spent)	0.25 billion visits per year (10% of all visits)  £16 billion spent during visits (80% of all money spent)
<b>Average spend per visit</b>	-	£9	£63
<b>Items purchased during visits</b>  <i>(Percentages of visits involving spend on each category)</i>	-	Food and drink – 76% Car parking - 14% Fuel – 12% Admission fees – 7% Transport fares – 5% Gifts/souvenirs – 3% Equipment hire – 1% Equipment purchase – 1%	Food and drink – 85% Car parking - 32% Fuel – 22% Admission fees – 21% Transport fares – 12% Gifts/souvenirs – 15% Equipment hire – 2% Equipment purchase – 4%
<b>Reasons more likely to be given for taking visits and activities undertaken</b>  <i>(Percentages of visits taken by each group)</i>	To exercise dog (59%) For own health & exercise (48%)	Playing with children (17%) Walking without a dog (41%)	Relaxing/ unwinding (42%), time with friends (32%) or family (26%), eating out (30%), enjoying scenery (29%)
<b>Destinations more likely to be visited</b>  <i>(Percentages of visits taken by each group)</i>	Places within 2 miles of home (77%) Countryside (53%) – especially woodland (14%), paths/bridleways (16%)	Places 3 to 10 miles from home (35%) Town or city (44%) – especially playgrounds (6%), urban parks (25%)	Places over 10 miles from home (51%) or visiting from a holiday base (12%) Coastal (22%), mountain, hill or moorland (5%) locations
<b>Transport modes</b>  <i>(Percentages of visits taken by each group)</i>	Mainly on foot (75%)	Mixed but over half by car (57%)	Mainly by car (67%).
<b>Visitor profile</b>  <i>(Percentages of people in each group)</i>	Visit the natural environment every day (55%) Female (54%) C2DE (42%) Empty Nester lifestage (36%) Dog owners (64%)	Visit the natural environment weekly (63%) C2DE (42%) Family lifestage (33%) Don't have a dog (76%)	Male (54%) Working full time (58%) AB socio-economic group (38%) No children in household (45%)

This comparison shows significant differences in the characteristics of visits involving no money being spent, a lower level of money being spent and the highest levels of expenditure.

- Visits involving **no expenditure** during the visit are predominantly taken close to home (77% within 2 miles) and on foot and they are likely to be motivated by the need to exercise a dog and/or for personal health and exercise. Countryside locations are most likely to be visited on no expenditure visits, in particular woodland. These types of visit are most often taken by people who take very regular visits to the natural environment, in particular dog owners, women and people in the Empty Nester lifestage (aged 55+, no children in household).
- In visits involving a **lower level of money** being spent during the visit (average £9 including zeros), expenditure is usually only on food and drink. Compared to other visits, these types of visit more frequently involve walking without a dog or time spent playing with children. These visits are more likely to be taken in urban green spaces such as parks and playgrounds, usually within 10 miles of home. These types of visits are more likely to be taken by families and people who don't have a dog.
- In visits involving a **higher level of money** being spent during the visit (average £63 including zeros), money is likely to be spent on a range of items including food & drink and items relating to transport, admission fees or souvenirs. These visits tend to be taken by car and some distance from home, often from a holiday base. They are more likely than other visits to include a coastal, mountain, hill or moorland destination. These visits are often motivated by the desire to relax and unwind, spend time with family or friends and/or enjoy scenery. These types of visits are more likely to be taken by people who work full time, are members of the most affluent AB socio-economic groups (higher and intermediate managerial occupations) and people with no children.

#### *Multivariate analysis*

A multivariate analyses of the MENE data identified the visit characteristics and demographic variables most closely related to average levels of expenditure (including zeros) during a visit to the natural environment. More details on this analysis and the full outputs are included in Appendix 1.

This analysis confirmed some of the patterns found in the comparisons described in the previous section. In terms of visit details, expenditure varies most significantly according to the distance travelled on visits and, related to this, mode of transport used. Whether or not a visit includes eating out, visiting attractions or visiting a beach are also significant predictors of expenditure levels.

In terms of demographics, working status is most significant with those people who work spending the most during visits.

**Table 3 – Main results of multivariate analysis (see Appendix 1) - MENE March 2009 to February 2013**

<b>Most significant <u>visit</u> variables from multi-variate analysis- in order of significance</b>	<b>Spend more during a visit if</b>
Distance	Travelled further
Transport used	Did not travel on foot
Whether ate or drank out	Ate out
Whether visited an attraction	Visited
Whether visited a beach	Visited

<b>Most significant <u>demographic</u> variables from multi-variate analysis - in order of significance</b>	<b>Spend more during a visit if</b>
Working status	Working
Internet access	Have access
Ethnicity	Black and Minority Ethnic Population
Socio-economic group	AB (higher and intermediate managerial occupations)

### **3.4 Focus on distance travelled, type of places visited and transport mode**

Figure 7 below show the proportions of visits involving any expenditure during the visit and the average spend per visit (including zeros). In addition, data is shown for estimates of the total annual expenditure during visits on the basis of the distance travelled.

The average spend per visit results clearly illustrate the direct relationship between distance travelled on visits and level of expenditure, ranging from £1 average spend during visits taken within 1 mile of home to £101 during visits which involve a journey of over 100 miles<sup>5</sup>. While just 19% of visits to the natural environment involve a journey of 6 miles or more, 69% of expenditure takes place during these visits.

<sup>5</sup> Note that the results shown are averages across all visits taken in each category of visit, including those with no expenditure at all. Also note that when comparing average amounts spent, as a rule of thumb, only differences of at least £5 should be treated as statistically significant.

Figure 7 – Visit expenditure by distance travelled on visits - MENE March 2009 to February 2013. Averages include visits with zero spend

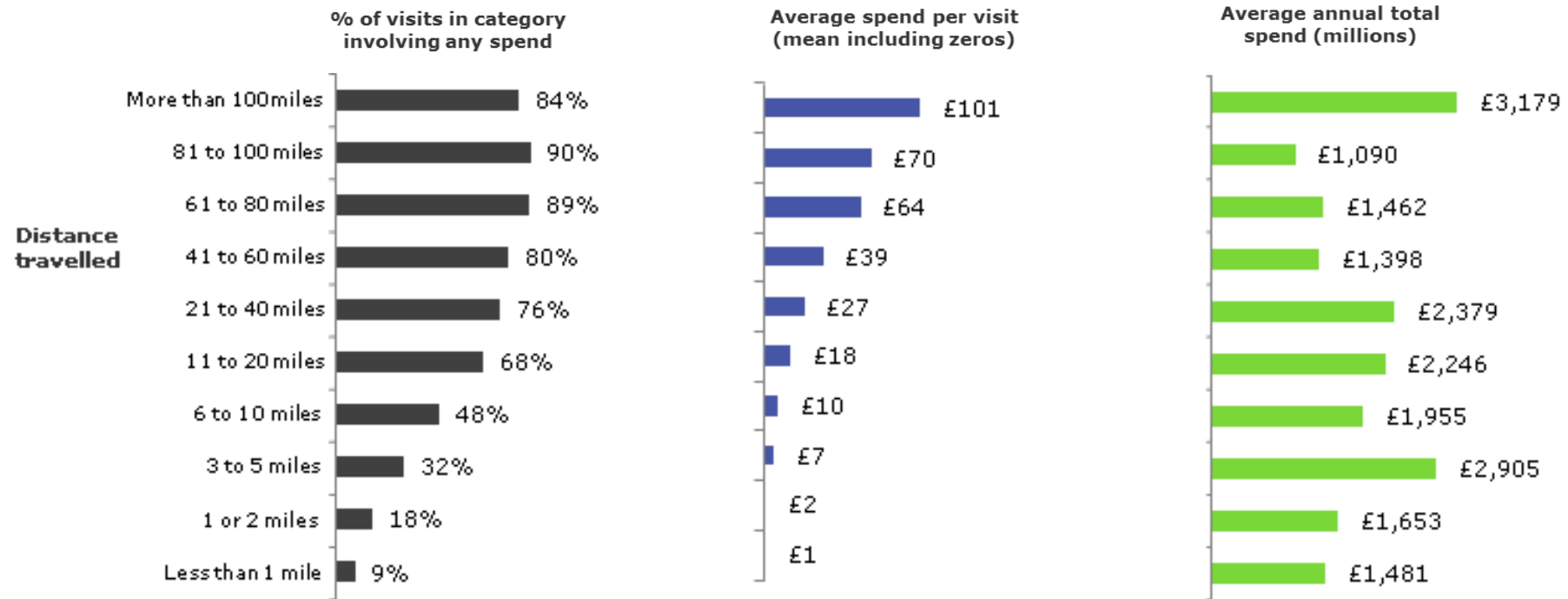


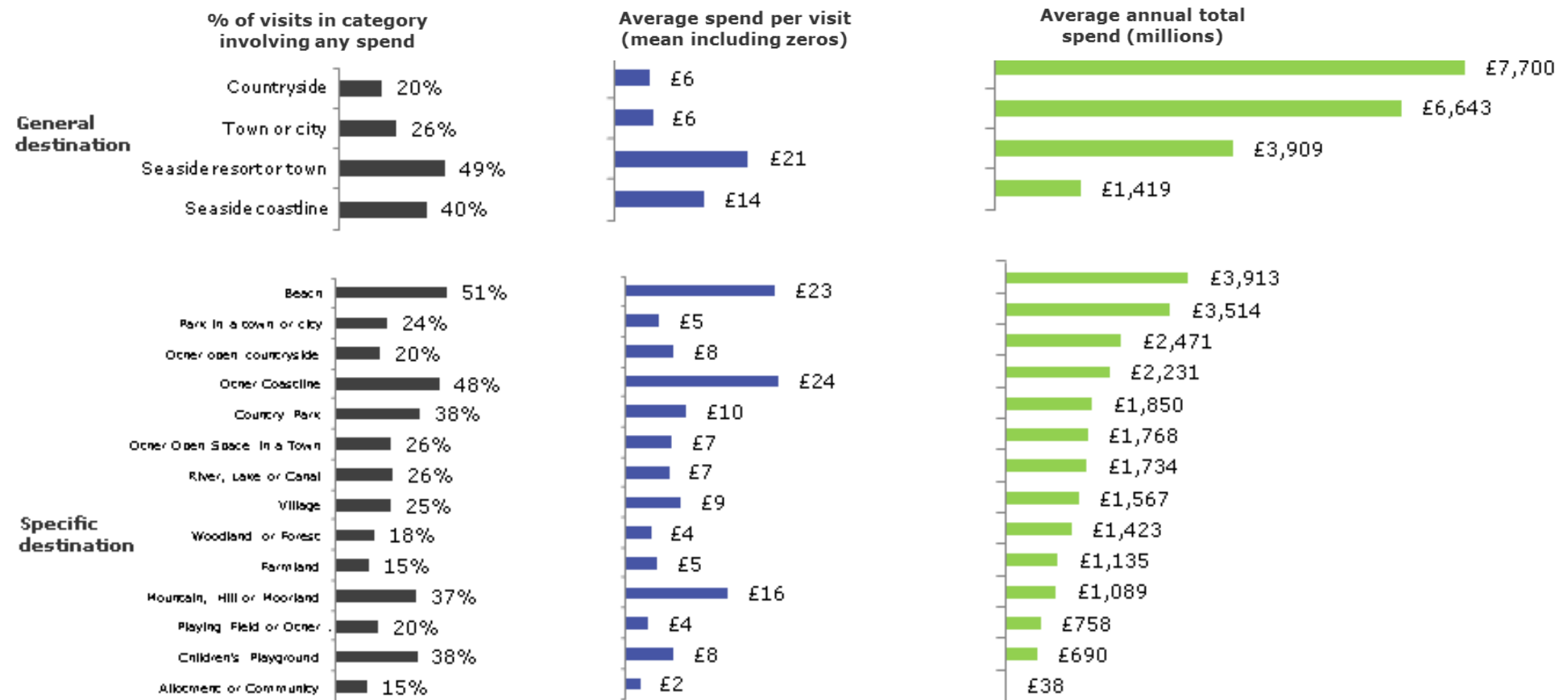
Figure 8 overleaf illustrates variations in levels of visitor expenditure by type of place visited.

Average spend per visit is generally highest during visits to the coast, and during visits to mountain, hill or moorland locations. However, it is lowest during visits to urban parks, farmland, woodland, playing fields and allotments<sup>6</sup>.

While 10% of all visits are taken to the coast, these visits represent 27% of the total expenditure during visits to the natural environment. In contrast while 13% of all visits take place in woodland, just 7% of visit expenditure takes place during these visits.

<sup>6</sup> Ibid

Figure 8 – Visit expenditure by type of place visited - MENE March 2009 to February 2013. Averages include visits with zero spend

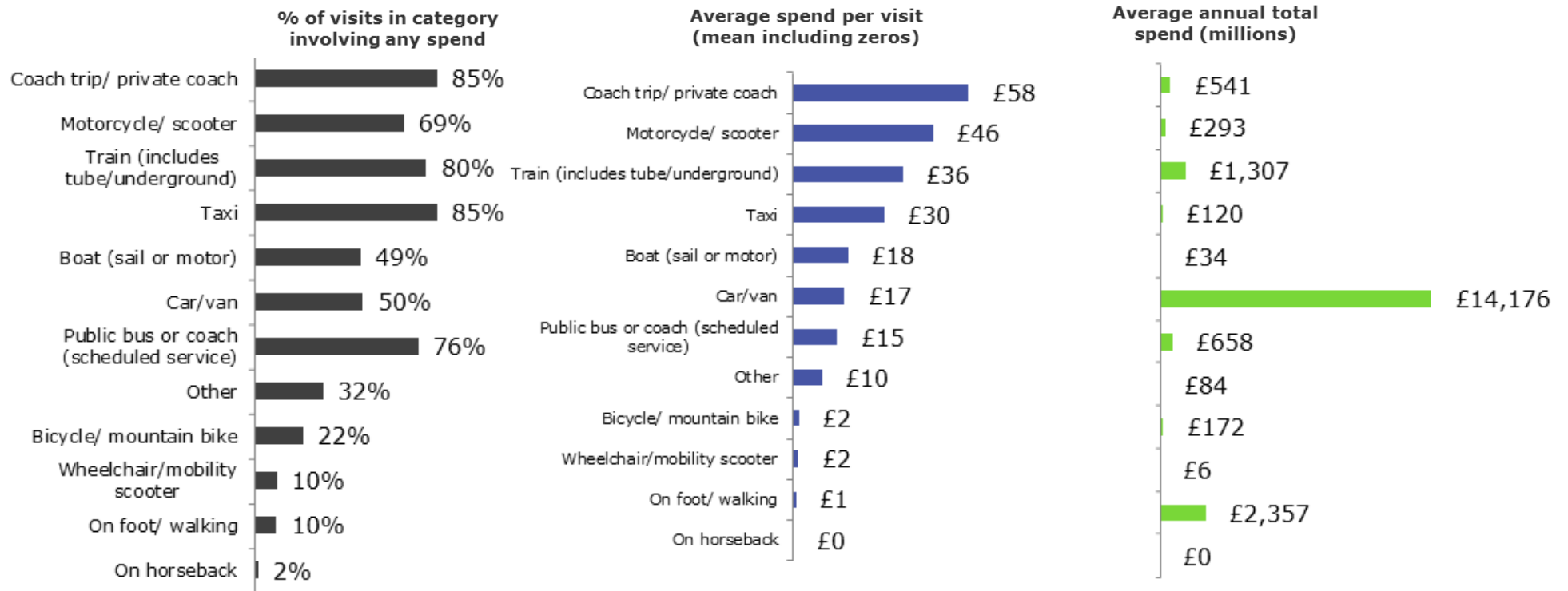


In terms of transport mode used to reach the visit destination, visits taken by coach, motorbike, train or taxi involved the highest levels of expenditure during the visit while spend was lowest during visits taken on foot or horseback<sup>7</sup>.

It is notable that while 31% of all visits involve travel by car, 72% of expenditure takes place during these visits. Conversely, while 62% of visits are taken on foot, just 12% of expenditure occurs during these visits.

<sup>7</sup> Ibid

Figure 9 – Visit expenditure by mode of transport - MENE March 2009 to February 2013. Averages include visits with zero spend



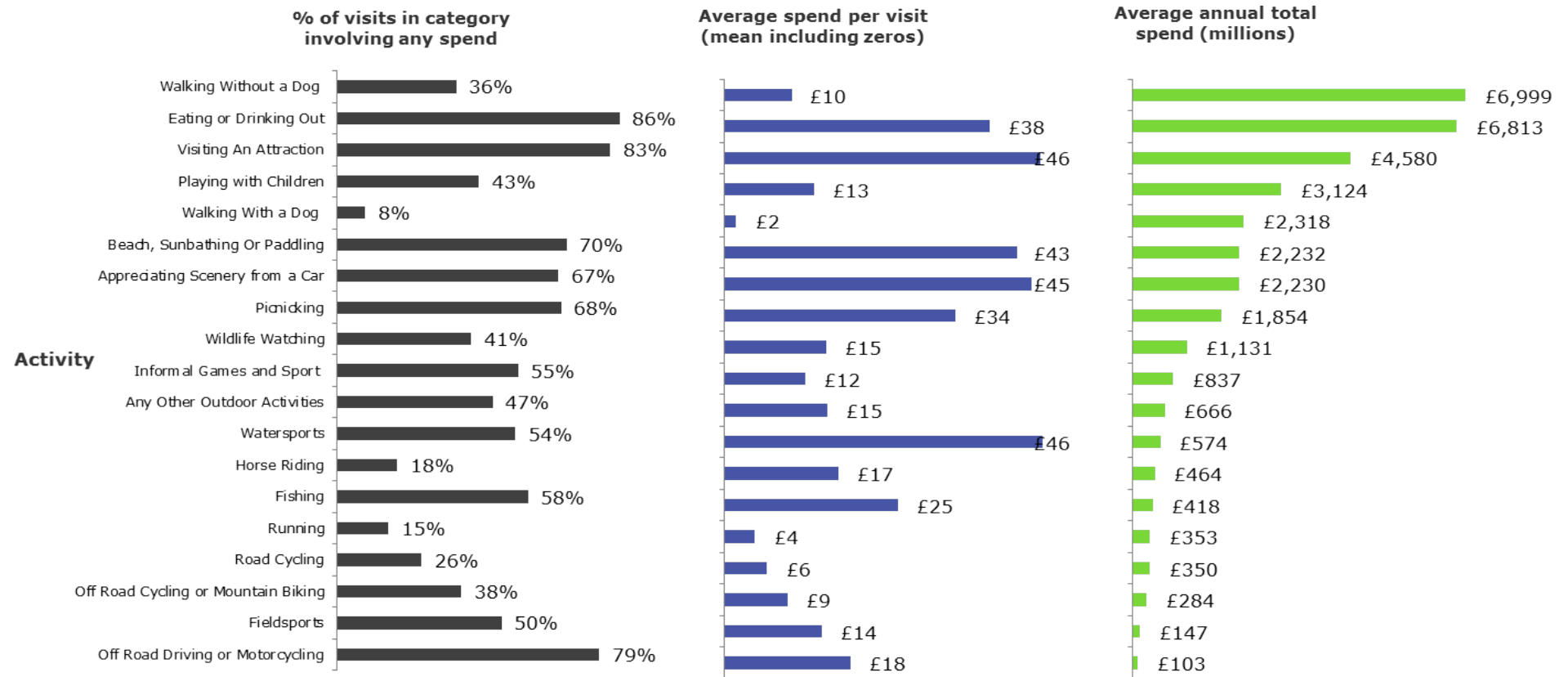
### 3.5 Focus on visit activities and motivations

As shown in Figure 10 overleaf, average expenditure levels are highest during visits involving eating and drinking out, visiting attractions, spending time on a beach or appreciating scenery or watersports. However, they are lower than average on visits which involve dog walking, running or road cycling<sup>8</sup>.

Notably, while eating out is an activity on just 6% of visits, 35% of total expenditure takes place during these visits.

<sup>8</sup> Ibid

**Figure 10 – Visit expenditure by activities undertaken on visit - MENE March 2009 to February 2013. Averages include visits with zero spend**

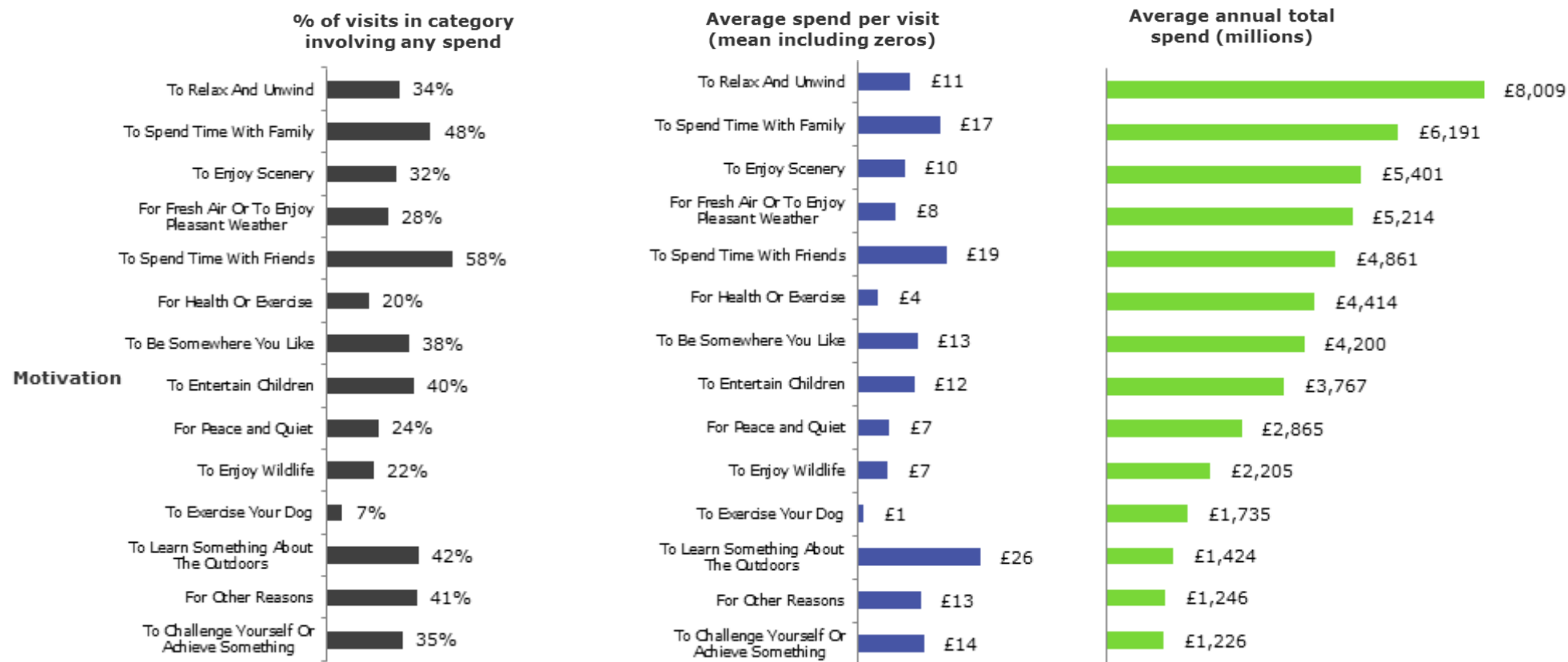


Expenditure levels also vary by reasons for taking visits (Figure 11 overleaf) with the highest average expenditure during visits taken to learn something about the outdoors or for social reasons or to spend time with friends or family. However, expenditure levels are lowest during visits taken to exercise a dog or for personal health or exercise<sup>9</sup>.

Overall, 41% of visit expenditure is made during visits taken to relax while 31% is made during visits taken to spend time with family.

<sup>9</sup> Ibid

Figure 11 – Visit expenditure by visit motivations - MENE March 2009 to February 2013. Averages include visits with zero spend



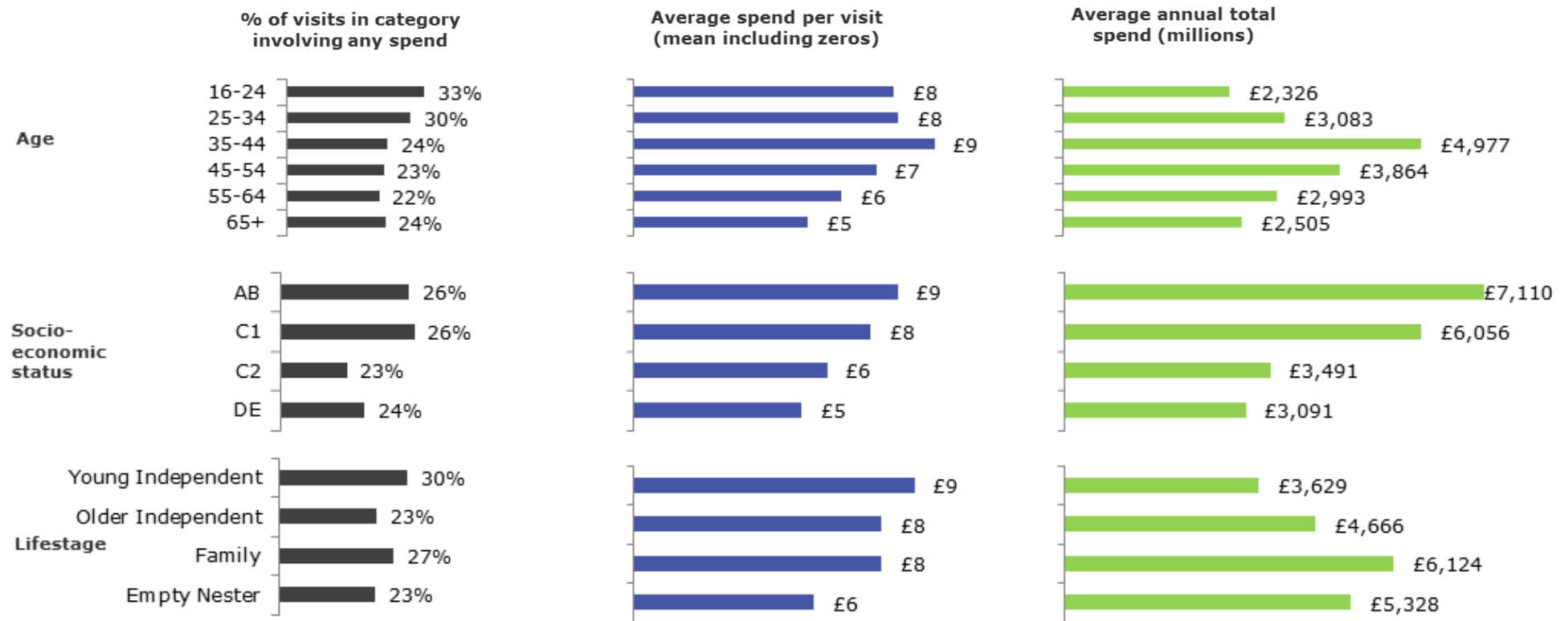
### 3.6 Focus on visitor demographics

In general the level of variation in average expenditure (including zeros) during visits amongst different demographic groups is less notable than seen for different visit destinations and activities. Spend per visit is highest during visits taken by people aged 35 to 44, those in the more affluent socio-economic groups and those aged under 35 with no children<sup>10</sup>.

<sup>10</sup> Note that the results shown are averages across all visits taken by members of each demographic group, including those with no expenditure at all. Also note that when comparing average amounts spent, as a rule of thumb, only differences of at least £5 should be treated as statistically significant.



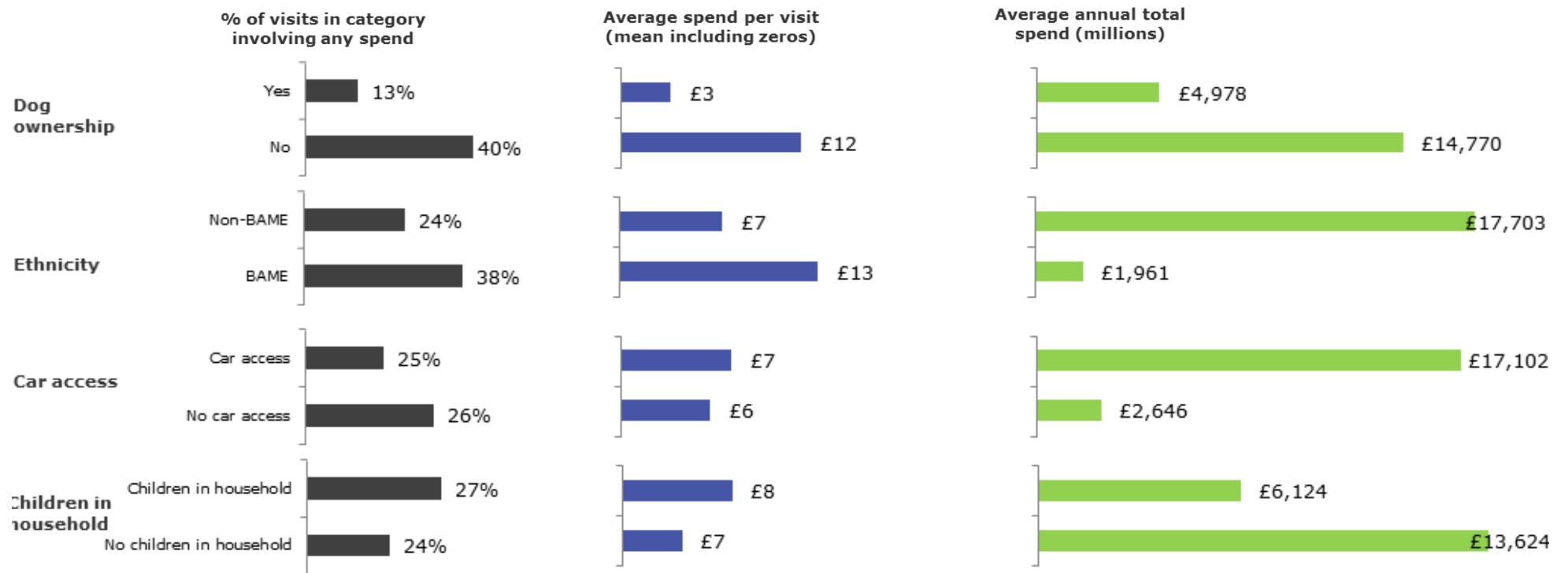
**Figure 12 – Visit expenditure by age, socio-economic group and lifestage - MENE March 2009 to February 2013. Averages include visits with zero spend**



Reflecting the low levels of expenditure during visits taken for dog walking, average spend per visit is much lower amongst dog owners. There is little variation by car access or presence of children in the household, while the average (including zeros) is higher amongst members of the BAME population<sup>11</sup>.

<sup>11</sup> Note that the results shown are averages across all visits taken involving each demographic group, including those with no expenditure at all. Also note that when comparing average amounts spent, as a rule of thumb, only differences of at least £5 should be treated as statistically significant. BAME refers to members of the Black and Minority Ethnic population.

Figure 13 – Visit expenditure by dog ownership, ethnicity, car access and children in household - MENE March 2009 to February 2013. Averages include visits with zero spend



### 3.7 Analysis by visit destination

The large MENE sample size allows analysis of expenditure during visits at a sub-national level. Appendix 2 contains results relating to visits taken to each English region (ie Government Office Region), Local Enterprise Partnership (LEP) and County (excluding areas where the sample size is under 100). Please note that this analysis refers to the area visited and not the locations in which respondents were resident.

For each of these geographic classifications, areas have been ranked from highest average spend per visit to lowest.

Table 4 shows the top 3 and bottom 3 average spend (including zeros) destinations by region, LEP and County. When analysed by destination region, the highest spend area was the South West (£8) while the lowest spend was recorded in the North East (£3).

When analysed by LEP and County, spend is found to be highest in Cumbria, Dorset and Lincolnshire (Greater Lincolnshire LEP) but lowest in Hertfordshire, Tees Valley and Black Country LEPs and Durham, Bedfordshire and South Yorkshire Counties.

**Table 4 – Highest and lowest average spend by destination area**  
- MENE March 2009 to February 2013. Averages include visits with zero spend

#### *By Region*

	Area and average spend (inc. zeros)	Estimated total spend	Sample size
<b>Highest spend per visit</b>	<b>South West - £8</b>	£3,147m	1,975
	<b>London - £7</b>	£1,314m	1,535
	<b>North West - £7</b>	£1,955	1,813
	<b>South East - £7</b>	£2,497	2,425
<b>Lowest spend per visit</b>	<b>East of England - £5</b>	£1,365m	1,699
	<b>West Midlands - £4</b>	£836m	1,426
	<b>North East - £3</b>	£510m	744

#### *By Local Enterprise Partnership (LEP)*

	Area and average spend (inc. zeros)	Estimated total spend	Sample size
<b>Highest spend per visit</b>	<b>Cumbria - £19</b>	£699m	216
	<b>Dorset - £17</b>	£572m	228
	<b>Greater Lincolnshire - £15</b>	£603m	249
<b>Lowest spend per visit</b>	<b>Hertfordshire - £3</b>	£131m	296
	<b>Tees Valley - £2</b>	£133m	261
	<b>Black Country - £1</b>	£28m	202

*By County*

	Area and average spend (inc. zeros)	Estimated total spend	Sample size
<b>Highest spend per visit</b>	<b>Cumbria - £19</b>	£695m	212
	<b>Lincolnshire - £15</b>	£603m	249
	<b>Dorset - £15</b>	£464m	209
<b>Lowest spend per visit</b>	<b>Durham - £2</b>	£130m	130
	<b>Bedfordshire - £2</b>	£71m	71
	<b>South Yorkshire - £2</b>	£126m	126

Further analysis has been undertaken to provide a greater understanding of geographical variations in spend levels with a focus upon the bottom 2 and top 2 LEP destinations in terms of average expenditure<sup>12</sup>.

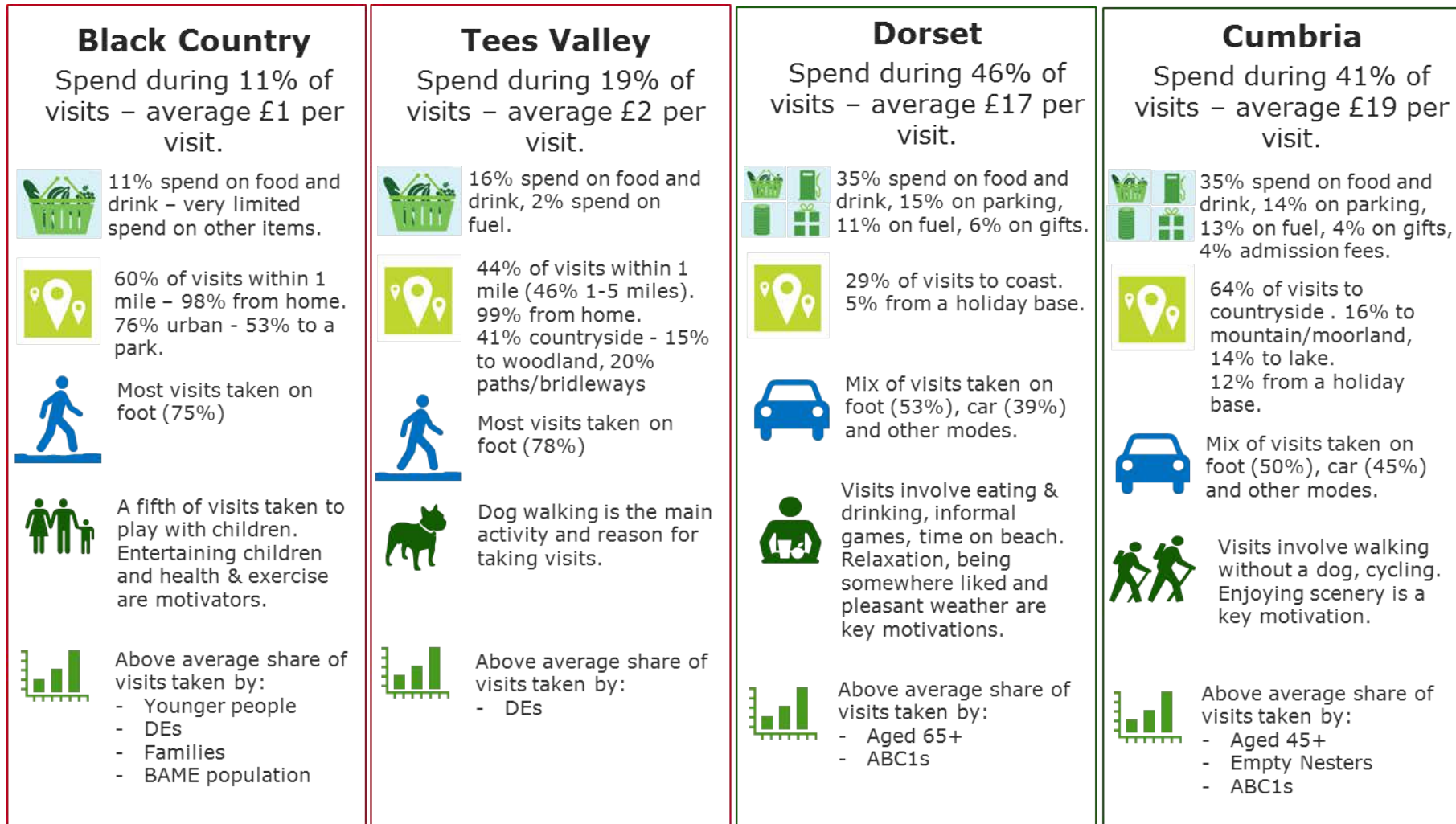
The key results of this analysis are summarised in Figure 14 overleaf. In the two lowest level spend areas, Black Country and Tees Valley, visits are predominantly taken on foot by local residents who are more likely to be in the lowest socio-economic groups.

In the Black Country most visits are taken to urban locations such as parks and around a fifth are taken to entertain children. In Tees Valley a large share of visits are taken to walk a dog, often to local countryside locations, making use of woodland, paths and bridleways.

In contrast, in the two LEP destinations with the highest average spend, Dorset and Cumbria, visits are more likely to be taken from further afield or while on holiday and tend to involve a wide variety of activities. Visits taken to Dorset are likely to include time on a beach and eating out while visits taken to Cumbria are likely to include visits to mountain and moorland locations, hill walking and enjoying scenery.

<sup>12</sup> Please note that some/ all of the expenditure may have taken place in an LEP other than that visited.

Figure 14 – Comparison of profile of visits by lowest and highest level spend LEAs. Averages include visits with zero spend



# Appendix 1 – Data tables and more details on multivariate analysis

## **Data tables**

Full results of the analyses undertaken in the production of this report are available in the accompanying Excel file.

## **Multivariate analysis**

Multivariate analysis was undertaken using CHAID approaches (Chi-squared Automatic Interaction Detector). CHAID identifies the predictors that account for the most “explained” variance in the selected dependent variable. In this case the dependent variable is the average amount spent during a visit (including zeros) and the predictor variables are variables relating to the visit (such as places visited and activities undertaken) or variables relating to the visit taker (such as age or socio-economic group).

CHAID analysis identifies the variables that most differentiate those visitors who spend the most and least money during a visit to the natural environment.

The full outputs of the CHAID analysis are included in the accompanying Excel file (see the tabs labelled ‘CHAID’).

## Appendix 2 – Detailed analysis by destination<sup>13</sup>

By region visited - MENE March 2009 to February 2013. Averages include visits with zero spend

	Sample size	% any spend	Estimated accuracy (+/-)	Average spend (inc. zeros) per visit	Estimated accuracy (+/-)	Total annual volume of visits (m)	Total annual spend during visits (m)	Estimated accuracy (+/-)
South West	1,975	25%	3%	£8	1	371	£3,147	£347
London	1,535	36%	3%	£7	1	183	£1,314	£188
North West	1,813	24%	3%	£7	1	280	£1,955	£257
South East	2,425	25%	2%	£7	1	375	£2,497	£284
East Midlands	1,699	23%	3%	£6	1	228	£1,334	£211
Yorkshire and the Humber	1,538	21%	3%	£6	1	262	£1,540	£257
East of England	1,699	21%	3%	£5	1	274	£1,365	£260
West Midlands	1,426	23%	3%	£4	1	217	£836	£217
North East	744	20%	4%	£3	1	153	£510	£244

By LEP visited (excludes sample sizes of under 100) - MENE March 2009 to February 2013. Averages include visits with zero spend

	Sample size	% any spend	Estimated accuracy (+/-)	Average spend (inc. zeros) per visit	Estimated accuracy (+/-)	Total annual volume of visits (m)	Total annual spend during visits (m)	Estimated accuracy (+/-)
Cumbria	216	41%	9%	£19	3	37	£699	£98
Dorset	228	46%	9%	£17	3	34	£572	£87
Greater Lincolnshire	249	29%	8%	£15	2	39	£603	£100
Thames Valley Berkshire	154	24%	9%	£14	3	24	£333	£75
York and North Yorkshire	450	32%	6%	£10	2	70	£722	£133
Coast to Capital	376	37%	7%	£10	2	54	£515	£104

<sup>13</sup> Please note that this analysis refers to the area visited and not the locations in which respondents were resident. In addition, some/ all of the expenditure may have taken place in an LEP other than that visited.

Heart of the South West	706	25%	4%	£9	1	129	£1,191	£195
New Anglia	387	24%	6%	£9	2	60	£537	£119
Cornwall and the Isles of Scilly	331	25%	6%	£9	2	70	£626	£150
Enterprise M3	171	27%	9%	£8	3	23	£177	£66
Swindon and Wiltshire	155	21%	9%	£7	3	34	£256	£115
London	1510	36%	3%	£7	1	180	£1,299	£187
Oxfordshire LEP	163	15%	8%	£6	3	30	£194	£99
Solent	533	25%	5%	£6	2	94	£547	£155
Stoke-on-Trent and Staffordshire	268	19%	6%	£6	2	41	£235	£94
Greater Cambridge & Greater Peterborough	415	25%	6%	£5	2	71	£390	£150
West of England	316	22%	6%	£5	2	61	£320	£141
Liverpool City Region	396	22%	6%	£5	2	64	£316	£124
South East	1207	24%	3%	£5	1	171	£828	£187
Greater Manchester	428	23%	5%	£5	2	66	£316	£120
Sheffield City Region	565	19%	4%	£4	2	105	£468	£193
Leicester and Leicestershire	199	27%	8%	£4	3	34	£149	£104
Greater Birmingham and Solihull	432	29%	6%	£4	2	61	£266	£125
Coventry and Warwickshire	195	23%	8%	£4	3	29	£126	£88
Lancashire	567	20%	5%	£4	2	83	£351	£144
Gloucestershire	239	16%	6%	£4	3	43	£182	£115
Derby, Derbyshire, Nottingham and Nottinghamshire,	390	22%	6%	£4	2	72	£301	£149
Leeds City Region	653	17%	4%	£4	2	117	£467	£179
North Eastern	483	21%	5%	£4	2	95	£377	£168
Cheshire and Warrington	160	19%	8%	£4	3	25	£97	£75
The Marches	246	22%	7%	£3	2	43	£130	£108
South East Midlands	521	19%	5%	£3	2	90	£274	£157
Hertfordshire	296	15%	6%	£3	2	51	£131	£99
Tees Valley	261	19%	7%	£2	2	59	£133	£161
Black Country	202	11%	6%	£1	3	26	£28	£77



**By County visited (excludes sample sizes of under 100) - MENE March 2009 to February 2013. Averages include visits with zero spend**

	<b>Sample size</b>	<b>% any spend</b>	<b>Estimated accuracy (+/-)</b>	<b>Average spend (inc. zeros) per visit</b>	<b>Estimated accuracy (+/-)</b>	<b>Total annual volume of visits (m)</b>	<b>Total annual spend during visits (m)</b>	<b>Estimated accuracy (+/-)</b>
Cumbria	212	41%	9%	£19	3	36	£695	£98
Lincolnshire	249	29%	8%	£15	2	39	£603	£100
Dorset	209	44%	9%	£15	3	32	£464	£84
Berkshire	153	24%	9%	£14	3	24	£333	£75
East Sussex	258	42%	8%	£13	2	27	£334	£63
Norfolk	223	26%	8%	£12	3	33	£402	£88
Northumberland	103	33%	12%	£10	4	18	£183	£71
Inner London	733	45%	5%	£10	1	80	£778	£113
Devon	451	27%	6%	£9	2	82	£753	£154
Somerset	346	21%	6%	£9	2	64	£580	£136
Cornwall And Isles Of Scilly	315	25%	7%	£9	2	68	£597	£147
West Sussex	174	33%	10%	£8	3	29	£241	£90
Surrey	226	31%	8%	£8	3	32	£252	£82
North Yorkshire	614	26%	5%	£8	2	111	£838	£166
Wiltshire	155	21%	9%	£7	3	34	£256	£115
Derbyshire	386	26%	6%	£7	2	65	£474	£135
Cheshire	259	23%	7%	£7	2	40	£278	£97
Oxfordshire	163	15%	8%	£6	3	30	£194	£99
Hampshire	400	22%	6%	£6	2	71	£417	£136
Suffolk	257	24%	7%	£6	2	40	£234	£95
Merseyside	335	24%	6%	£6	2	52	£302	£108
East Riding	259	23%	7%	£6	2	40	£232	£94
Warwickshire	110	22%	11%	£5	4	18	£90	£67
Cambridgeshire	213	24%	8%	£5	3	37	£189	£102
Outer London	797	29%	4%	£5	1	104	£518	£144
Greater Manchester	430	23%	5%	£5	2	67	£316	£119
Staffordshire	394	19%	5%	£5	2	64	£288	£114
Kent	585	21%	5%	£4	2	86	£385	£156
Isle Of Wight	127	29%	11%	£4	3	21	£92	£80
Leicestershire	199	27%	8%	£4	3	34	£149	£104
Lancashire	552	19%	4%	£4	2	82	£318	£133
Worcestershire	189	30%	9%	£4	3	31	£115	£82
Buckinghamshire	259	22%	7%	£4	2	46	£168	£102
Essex	430	22%	5%	£4	2	70	£253	£120

West Midlands	486	23%	5%	£3	2	62	£213	£126
Nottinghamshire	305	19%	6%	£3	2	58	£189	£141
Northamptonshire	199	18%	7%	£3	3	37	£119	£110
Tyne And Wear	180	19%	8%	£3	3	35	£110	£107
Shropshire	201	22%	8%	£3	3	35	£106	£98
Gloucestershire	357	15%	5%	£3	2	67	£199	£138
West Yorkshire	390	14%	5%	£3	2	68	£201	£133
Hertfordshire	326	16%	5%	£3	2	55	£147	£106
Durham	275	18%	6%	£2	2	60	£130	£154
Bedfordshire	209	18%	7%	£2	3	33	£71	£96
South Yorkshire	351	14%	5%	£2	2	70	£126	£132