Near final version of:

Williams, A M and Shaw, G. (2009), 'Future play: tourism, recreation and land use – a Foresight review', [*Land Use Policy* 12 Supplement 1: S326-335](#)

1 INTRODUCTION

Tourism and recreation (TR) are one of the more dynamic and complex set of land uses in the UK. Strong growth in TR has been accompanied by changes in its form and distribution, and its relationships to other land uses. These relationships are shaped by demographic and social changes, trends in consumer behaviour, technology and transport shifts along with governance and policy evolution.

The evolution of TR land uses has been and will be shaped by five distinctive sectoral characteristics (Shaw and Williams, 2004).

- By strong temporal variations in the intensity of use
- Activities are spatially diverse, ranging from those contained at particular sites (e.g. gated theme parks, or historic buildings) to the spatially extensive (e.g. rambling or leisurely rural car drives).
- High levels of non-exclusive land uses outside a relatively small number of sites. Some 4 per cent of English farms offer tourist accommodation and 28 per cent let buildings for non-agricultural purposes (DEFRA, 2007).
- Strong presence of public goods means that individual land owners or site managers cannot impose exclusive use rights over aspects of these land uses such as views of historic townscapes, or beaches.
- Land uses are driven by the blurred nature of much tourism and recreational activities, the changing mix of domestic and international activities, and the balance between inbound and outbound tourism.

TR land uses are further complicated by the fragmented nature of the sector, which consists of diverse components such as transport, accommodation, catering, and entertainment, whose markets are variably dependent on TR. This has three main implications. First, data fragmentation makes it difficult to capture changes in the

sector as a whole, whether for activities or for land uses (Allnutt 2004). This is only partly compensated for by a profuse grey literature generated by consultancies and ad hoc surveys commissioned by local authorities and individual organizations, which are characterised by diverse methodologies which hamper comparative analyses. Secondly, there are complex and often highly individualised TR activity patterns ranging across multiple sites, evident in the time space distribution of such activities (Thornton et al., 1996). Thirdly, relatively weak governance reflects both fragmentation and competing interests within the sector.

Despite such complexities, there is a strongly symbiotic relationship between TR activities and land use. TR impacts strongly on land use, both at particular sites and in adjoining zones and travel corridors, illustrated by the seasonal flow of tourists to UK coastal resorts. Such impacts are not necessarily negative. TR activities have been drivers of urban regeneration (Law, 2002). Moreover, there is mutual dependency, as TR activities are highly sensitive to changes in the nature and quality of land uses, due to the importance of aesthetic and affective considerations including the socially constructed understanding of what constitutes a 'pure' or 'natural' landscape. An estimated 40 per cent of tourism-based employment in the UK is dependent on a high quality environment, a proportion increasing to 60-70 per cent in rural areas (National Trust, 2001).

We know that TR activities are important for land use, but current scientific knowledge remains uneven, despite several decades of research activity. We should first note some definitional issues (Hall et al 2004). Tourism tends to be defined in terms of spending at least 24 hours away from home either for any purpose, or in a more targeted approach, for leisure purposes, excluding business and educational motivations. This is necessarily arbitrary, as is the definition of recreation in terms of activities undertaken for pleasure. These can be sub-classified in a number of ways including individual v collective, formal v informal, and home v outdoor. It is important to acknowledge the arbitrary nature of such classifications in the face of the blurring of TR activities.

2 CURRENT SCIENCE

2.1 The drivers of TR activities

Current science can be conceptualised in terms of five key drivers which shape TR activities, and the outcomes in terms of aggregate land use patterns (Figure 1). While this provides a convenient framework for a state of the art review, it does not imply uni-causal relationships. Land uses are both an outcome and determinant of TR activities.

INSERT FIGURE 1 HERE

2.1.1 Socio-demographic shifts and consumer lifestyles.

TR activities are strongly differentiated by age, stage in the family life cycle and lifestyle groups (Euro Direct 2002). There are two significant trends: an aging population and the creation of more single-person households. The former is responsible for increasing numbers of retired households together with a more active generation of over 60's. About 25 per cent of the UK population is aged 55 or over, a total which is expected to increase to 31 per cent by 2021. At the other end of the age spectrum, more younger people are establishing single-person households, forming partnerships later in life. These form a significant segment of an important youth market. Research by VisitBritain (2004) has identified a number of lifestyle segments that have particular holiday habits which spill over into recreational behaviour. These include three key groups who are important in terms of domestic holidays (Table 1)

Table 1

Major tourism market segments and their characteristics

Segment	Core values	Market size & lifestage	Holiday habits
Cosmopolitans	Independent, individual risk-takers who seek new experiences and challenges, both physical and intellectual.	15 per cent of the population, with high ethnic representation. Relatively young, average income of £26,000 and over a third are post-family.	On average take over 4 short breaks a year. Enjoy wide variety of types of holiday, especially activity/themed holidays.
Discoverers	Independent of mind and keen on value for money. Little influenced by style or brand, but value good service.	12 per cent of the population, predominantly C1 with average income of £25,000. Most likely to be aged 26-35, with kids at home, and high internet usage.	More likely to take bargain break/late deals than package holidays. Much more likely to weekend in UK than abroad.
High Streets	Fashion victims (rather than pioneers) who care what others think. Will pay more for quality as long as tried and tested.	21 per cent of the population, predominantly ABC1 with average income of £22,000. Physically active, representing wide range of ages.	Attracted to bargain breaks and unlikely to go off the beaten track. Much more likely to take long holiday abroad than in UK.

Source: VisitBritain (2004)

Another important driver of change is the strong growth of international migration, as well as an increasing proportion of the population who are ethnic minorities. Both recent migrants and ethnic minorities have relatively low outdoor activity rates, particularly in the countryside, for reasons associated with identity formation, place attachment and social exclusion (Countryside Agency 2005) There has also been a general increase in internal migration so that families have become more geographically dispersed and spend significant amounts of time visiting friends and relatives.

2.1.2 Disposable income and free time

TR is dependent on disposable time, defined as time away from paid and unpaid work and various responsibilities. The availability of such time remains highly uneven, reflecting persistent social inequalities in terms of gender, class, ethnicity and age. Disposable free time intersects with other constraints and opportunities in the form of disposable income. This is conditioned not only by structural inequalities (Countryside Recreation Network 2001) but also by changes in the economic cycle as evidenced by the economic crisis of 2008, when increasing number of families cut their planned holiday spending.

Participation in TR activities varies significantly by socio-economic group. Work undertaken for the English Tourism Council on UK tourists highlights 35 market segments in holiday consumption (Euro Direct, 2002). Families taking multiple holidays are drawn from socio-economic groups A, B and C1, having above average overseas holidays and making more leisure trips within the UK. Groups A/B represent around 17 per cent of the UK population but consume 22 per cent of domestic holidays and 24 per cent of overseas ones. The market segment 'Families on Annual UK holidays' are comprised mainly of groups C1, C2, D and E. Groups D/E comprise almost 33 per cent of the UK adult population but consume just 27 per cent of domestic holidays. There are also strong links between car ownership and participation in TR, especially day trips. Leisure other than shopping trips dominate car usage, with average annual distance travelled per passenger (other than the driver) in 2002-3 being 1210 miles compared with 172 miles for commuting/business (DFT, 2005, Table 3.5)).

There have been significant changes in the availability of free time and disposable income over recent decades (Fisher and Gershuny, 1999), with three main trends:

- Increasing longevity and longer years spent in retirement - although pensioner incomes are highly polarised with relatively high proportions living in poverty.
- The growth of paid holidays. In the 1970s, some 20 per cent of workers had four weeks of paid holiday per annum, but this had increased to 80 per cent by 1980. Paid holiday currently averages 20-25 days annually.
- Reductions in general working hours, in part counterbalanced by increased participation of women in paid work, often as an addition to and only in part substitution for unpaid work at home, so that gains in leisure time have been uneven. Recent trends show that leisure time declined by 100 hours per annum in the late 1990's for some occupational groups, while almost a third of UK workers have less than 2 hours leisure time on a typical weekday (Mintel, 2006).

The increase in disposable time has been paralleled by an increase in disposable incomes. Disposable income is estimated to have increased by some 50 per cent since 1990 (Henley, 2005a), although characterised by increasing polarisation in the 1980s and early 1990s, and a broadly static picture thereafter, until the recession which emerged in 2008.

2.1.3 Technological changes

Three significant sets of technological innovations have shaped TR. First, the growth of home-based entertainment, a form of self-service leisure economy (Pine and Gilmore, 1999). Initially this was based on videos and subsequently was PC- and internet-based. Much of the increase in disposable time and income has been allocated to leisure activities at home, including e-commerce for leisure purposes (Henley 2005b). This includes joining social network sites, and the use of blogging and Twitter (Buhalis and Law 2008). Future developments in Video on Demand will transform access to entertainment products, giving greater leisure choice at home.

Secondly, the internet has led to supply-side disintermediation (Buhalis and Ujma, 2006), understood as a shift to greater direct links between customers and the suppliers of TR services, at the expense of intermediaries such as travel agents. Individuals increasingly use the internet not only to acquire information on TR opportunities, but for direct bookings. Internet sales have been growing at 35-40 per cent per annum and the high street travel agent faces new and intense forms of competition. Internet usage is strongest amongst younger and middle-age groups, males and higher-income households. Similar trends are evident in areas of recreation, such as the reintermediation of ticket sales for events whereby internet-based agencies replace the traditional role of high street ticket agencies.

Thirdly, some technological changes have enhanced individual mobility, resulting in changing, intensifying and often potentially intrusive land use changes, particularly in rural areas. These include the use of GPS navigation systems, off-road vehicles, and high-powered boats, along with the growth of adventure tourism. All of these have impacted on rural land use, intensifying conflicts between users of non-exclusive spaces.

2.1.4 Transport

Cars remain the most important mode of transport in recreational trips in the UK. This has significant direct land use impacts. Many journeys are made for recreation, and there is a need for car parking at destinations. It also broadens the geographical scope of individual activity.

Since air travel deregulation in the late 1990s, low-cost airlines have expanded rapidly. The changes brought by budget airlines resulted in disruptive innovations in terms of costs, prices and usage, and reshaped the geography of air travel. The main gains have been enhanced air connectivity in intermediate regions (Dobruszkes, 2006). The new map of connectivity is characterised as point-to-point as opposed to the hub and spoke organisation of traditional air carriers. This has had two major impacts on tourism – enhancing the UK short breaks market, and making outbound holidays more accessible for those living outside the metropolitan regions. The combination of low-cost airlines and internet bookings has transformed the outbound

short-break market, which increased from around 11 per cent of all overseas trips in 1997 to over 15 per cent in 2002 (IRN Research, 2002).

Changes in rail travel are more difficult to disentangle. The growth of Eurostar services has increased demand for short breaks, and other holidays via rail transport, from all UK regions (ttglive 2009). In addition, there has been considerable growth in rail travel in recent years, with advanced and off-peak fares being targeted particularly at leisure users.

2.1.5 Governance and policy

The governance of TR is often criticised as weak, although this claim is difficult to verify. This weakness stems in part from the fragmented nature of the sector and the prevalence of small firms. Responsibility for tourism has frequently been transferred between ministries, while tourism responsibilities are fragmented within local government between departments dealing with economic development, conservation and culture. This fragmentation is compounded by weak interest group representation (Tyler and Dinan, 2001). Since 2003, Regional Development Agencies (RDAs) have had primary responsibility for regional tourism development, but have paid variable attention to the sector, being weakest in those regions where tourism is most important in the economy (House of Common 2008: 34). There have also been concerns about reductions in the activities of the English Tourism Council and its successor organization, Visit Britain (House of Commons, 2008),

The governance of land use in TR is also problematic because of the high incidence of public goods. They are both 'non-excludable' (their use can not be limited to those who pay), and 'non-exclusive' (use by one individual does not exclude them being used by others) (Hall and Williams, 2008). TR attractions – such as views of particular sites, or walking a coastal footpath – usually cannot be charged for, but are essential to the TR experience. Individual firms will be unwilling or unable to invest in managing such land uses, and this requires either state intervention or voluntary ownership or activities, as exemplified by the National Trust.

In TR there is considerable tension between the composite nature of the consumer experience and the importance of public goods, the scope for free riding amongst competitors and the fragmented nature of ownership. This has made partnerships particularly important in TR governance (Bramwell and Lane, 2000). Public sector involvement has increasingly taken the form of promoting, and often leading, such partnerships.

Partnerships also feature prominently in urban regeneration and rural diversification strategies, where TR often plays a leading role. This reflects both strong demand and the potential to generate jobs and stimulate other land uses at relatively low capital costs. In urban areas, tourism and recreation are used to fund overall regeneration schemes, to trigger land use transformations, and to bring people and activities back into derelict zones, characteristically in waterfront locations (Law, 2002). In rural areas, tourism and recreation provide an alternative source of income, in response to agricultural decline and – in remoter areas – population losses (Sharpley 2004).

2.2 Growth and consumption changes

Although there is little direct evidence of land use changes resulting from changes in TR, the broad trends are known from a variety of indirect data sources dealing with activities and expenditures. Such measures are utilised in the discussion of land use in section 2.3. The headline story is continued expansion of the sector, evident in the proportion of household expenditure, devoted to recreation and culture, and hotels and restaurants increasing from 19% to 24% between 1971 and 2006 (Social Trends 2006).

The land use impacts of the activities related to these expenditures are mediated by net international tourism flows and by the shifting balance between at-home and outdoor recreational activities. Both inbound and outbound tourism have expanded more or less constantly over recent decades. The balance between them changed, however, in 1971 when outbound tourism, overtook inbound. The gap has grown since, so that by 2006 UK residents made 69.5 million visits abroad, two thirds of these being for holidays (Travel Trends, 2008). This is a threefold increase since the early 1980s. Inbound tourism has also expanded rapidly, but at a lower rate, and has

been largely static since 1997. The total number of inbound visits was 32.7 million in 2006, less than half the outbound number. The average stay has decreased from 12 nights per visit in 1985 to just over 8 in 2005. In contrast, short visits (1-3 nights) increased by 39 per cent between 2001 and 2005.

Although the growth of international tourism has been impressive, domestic tourism continues to be dominant, accounting for approximately four fifths of all tourism within the UK. Aggregate domestic tourism expanded strongly in the 1950s, was weakened by outbound tourism growth over subsequent decades, and has been relatively static in the past 10 years (Travel Trends, 2008).

There have been important changes in consumption preferences for tourism, generally characterised in terms of post-Fordist shifts to greater individualisation and consumer-led production, driven in part by the ways in which TR is used as cultural capital. Since the mid-1980s, heritage and cultural activities, ecotourism and ecorecreation, adventure activities, theme parks and mega shopping malls have all expanded (Shaw, 2007). Heritage, cultural and shopping activities tend to have an urban focus, while eco and adventure activities tend to be rural (Table 2). Alongside these broad shifts, diverse niche TR activities have also grown, ranging from the re-enactment of historical events, to book fairs or orienteering. The extent of these changes is illustrated by heritage activities. Since the mid-1970s, more than 1000 new museums have been opened, and the National Trust has seen its membership increase from 270,000 in 1971 to 3.5 million in 2008 (VisitBritain 2008).

Table 2

Changes in consumer trends impacting on tourism and recreation

- Grow of mass customisation includes interest in perceived 'customised' experiences e.g. theme parks
- Increase in consumers searching for quality experiences, ethical products, spiritual awareness (volunteer holidays), desire for self-improvement (sports, health and heritage, culture)
- Increasing interest in the environment

- Growth of 'tribing' – being part of well defined activity groups (defined by types of leisure interests)
- Increased desire for pleasure, fun activities and experiences especially within the youth market (e.g. 'hen' and 'stag' breaks), and strong hedonistic demands

Source: VisitBritain (2005); Muirden and Martin (2004)

Other features of these consumption shifts include increasingly individualised consumption, a greater emphasis on informality and spontaneity, more attention to health and well-being (evident in the growth of gyms, jogging and walking activities), and increasing integration of technology into such activities (Henley 2005a).

According to the Taking Part Survey (Table 3), the most common recreational activity (undertaken by 82 per cent cent of adults) in England in 2005/06 was watching television, followed by spending time with family and friends (75 per cent). The home-centered nature of recreation was also underlined by more than 60 per cent identifying both listening to music and reading as important. Outside the home, shopping and eating out were most important, followed by cultural activities, whether attending live performances or visiting museums and galleries.

Table 3

Free Time Activities (England) 2005-06

<u>Selected Activities</u>	per cent participating
<i>Home based</i>	
Watching TV	82
Time with family/friends	75
Listening to music	69
Reading	64
Gardening	49
Internet/e-mailing	42
DIY	36

Playing computer games	18
Arts and crafts	18
<i>Away from Home</i>	
Shopping	63
Eating out	59
Days out	56
Sport/exercise	49
Going to cinema	41
Going to theatre/concerts	36
Going to pubs/clubs	44
Visiting Museums	26

Source Social Trends 38 (2008)

Among out-of-home activities, according to the Day Visit survey, walking is most popular but is still only undertaken as a recreational activity by a quarter of those surveyed. Shopping is the other major recreational activity (62 per cent). In terms of active sports participation, 21 per cent had taken part in moderate intensity sports and active recreation for at least 30 minutes on at least three occasions a week in the four weeks prior to the survey. Excluding walking, the most popular activities were swimming, followed by snooker, billiards or pool for men, and by gym or fitness activities for women.

2.3 Temporal and spatial features of land use

Changing TR activities in the UK have had distinctive land use outcomes, discussed here in terms of inter-regional, intra-regional and temporal distribution. Particular attention is paid to the intra-regional scale, where we distinguish between urban, rural and coastal locations. The overall pattern is of uneven and polarised impacts, which have changed over recent decades in response to the drivers discussed above.

2.3.1 Regional

Most day trip recreation is relatively localised. The Leisure Day Visits survey indicates that the averaged distance travelled for any leisure day trip is just over 15 miles, and has varied little over the last decade. These trips broadly reflect the distribution of population and disposable income. The main generators of leisure day visits in the UK are the South East, followed by the North West and London. This means that a significant component of TR land use is driven by changes in highly localised catchment areas.

The distribution of tourism is far more uneven (Table 4). While there is some overlap between the regional distributions of domestic and inbound TR, there are significant differences arising from contrasting motivations and from varying accessibility (Shaw et al., 1998). International tourist arrivals in the UK are channelled through a relatively small number of airports and ports, especially in the case of inter-continental tourism. Not surprisingly, therefore, inbound tourism is strongly polarised, with London accounting for some 45 per cent of all international visitors, followed by Edinburgh, Manchester, Birmingham and Glasgow.

The changing distribution of domestic tourism is more complex, and is the outcome of relative shifts in the importance of urban, rural and coastal destinations, and of long stay and short stay holidays, as discussed below. However, the fall in the numbers of long stay holidays has impacted particularly on traditional holiday regions such as the South West since the 1970s, as well as on Southern England, East Anglia, and Yorkshire and Humberside.

Table 4

Regional Destination of Domestic Tourism Trips

<u>England (RDA regions)</u>	<u>Trips (m)</u>
South West	20.5
South East	17.9
North West	13.0

East of England	10.6
Yorkshire	10.4
London	10.1
West Midlands	8.4
East Midlands	7.4
North East	3.6
<u>Scotland*</u>	
West	4.7
East	4.2
North	3.6
Edinburgh	2.1
Glasgow	1.8
South	1.1
<u>Wales*</u>	
North	2.9
South East	2.2
South West	1.9
Mid	1.6

* due to smaller sample sizes, Scotland and Wales are subject to wider margins of error.

Source: UKTS (2007)

2.3.2 Intra-regional

Recreational day trips are concentrated in urban areas, reflecting the short distances travelled, and UK population distribution and the types of activities involved. In 2005, 71 per cent of day trips were to towns or cities, while 24 per cent were to rural areas, and 5 per cent were to the seaside. There is a lack of reliable statistics to allow tracking of longer term intra-regional changes.

Shifts in demand away from coastal resorts have been particularly important (Shaw and Coles, 2007). However, even here the picture is complex. Larger resorts such as Blackpool, Bournemouth and Torbay have more diversified activities than smaller resorts. Domestic tourists take around 25.5 million seaside holidays per year along with an estimated 267 million recreational day trips to coastal destinations (Table 5).

Rural TR has experienced relative growth in recent decades, partly being associated with increased interest in walking as a recreation, as well as nature and eco tourism and recreation. There is also a perceived association between health, well being and rurality (CPRE, 2005). This has resulted in modest expansion of commercial accommodation in villages and small towns. However, there are also important elements of second home ownership (Gallent et.al., 2005) and farm tourism. Rural TR involves a mixture of cultural and recreational activities. Recreation is relatively spatially diffused throughout the countryside, facilitated by the Countryside and Rights of Way Act 2000, which opened up more than 3,000 square miles of land to walkers.

Table 5

Destination types and trips by staying tourists and day visitor recreationists

<u>Destination Type</u>	<u>Staying Tourists 2007</u> <u>(Trips m)</u>	<u>Day Visit Recreation</u> <u>2002-03 (Visits)</u>
Seaside	25.5	267m
Large city/town	47.7	3.7b
Small town	29.8	
Countryside/village	23.4	1.3b

* Note that, for day visits, seaside and coast (undeveloped areas) are combined and there is no category 'small town'

Source: UKTS (2007) and Great Britain Day Visits Survey (2002-03)

Urban TR has benefited from the growth of short breaks and development of new forms of TR (Law, 2002). Heritage-based activities have grown, spurred by the post-industrial fascination with 'gazing' on the remnants or simulacra of a disappearing

urban-industrial landscape and ways of life. This has benefited most regions, but particularly places with pronounced industrial heritages. New forms of cultural tourism and recreation have also increased, ranging from investments in new super museums to the creation of new, if often imitative, festivals.

2.3.3 Temporal

TR use of any space is always temporally uneven, having distinctive daily, weekly and seasonal rhythms. This has particular consequences where TR shares space with other land uses. Sometimes the timing of different uses may be complementary, such as the replacement of commuters in city centres by recreational users in the evening and at weekends. Elsewhere they may generate conflicts when TR activities coincide with peaks in farming activities, or when summer holiday visitors compete with commuters for limited transport capacity.

Perhaps the most dramatic change in the temporality of TR land use has been the shift since the 1970s from longer-stay tourism to short-break tourism, paralleled by a shift from overnight holiday breaks to day visits. This partly relates to the shift from coastal to urban and rural tourism, but similar trends are also evident within coastal tourism. The number of short stays (1-3 nights) increased from 53 million in 1995 to 64.5 million in 2002 and over the same period, holidays of 4+ nights declined from 40.5 million to 37 million (UKTS, 2003). Second home ownership, changes in disposable income and in the amount and flexibility of leisure time have been associated with this shift.

3 FUTURE TRENDS

A number of emerging trends and issues are likely to impact on future TR land uses, reflecting changes in the nature of production, consumption and regulation, and these need to be seen in their international context. Some trends reflect wider societal shifts, such as increased awareness of climate change, while others reflect trends specific to the TR sector, such as 'virtual tourism' and 'virtual recreation'. These trends are presented in Figure 2, reflecting the broad framework outlined in the review of current science. The available literature on these trends is relatively thin,

and the following argument is based on extrapolation from the review of current science.

INSERT FIGURE 2

3.1 Uneven growth of disposable time and incomes

Increases in disposable time will continue to be unevenly distributed by gender, age, ethnicity and social class, as in recent years (Euro Direct 2002). Within these broad inequalities, increasing labour market flexibility will have polarising effects, increasing the availability and flexibility of disposable time for some, while constraining others. The long post-war growth in disposable incomes has been brought to at least a temporary halt by the recession which started in 2008. When growth resumes, a change in the relationship between consumption and savings, and the availability of credit, may lead to reduced growth in expenditure on TR for the near future. While TR may continue to expand, there may be realignment in the growth of expenditure on them. This might mean a shift to less pronounced commodification of TR, in response to increased propensities to save.

3.2 Incorporating new technologies into recreation

Recent innovations which have blended different technologies, such as the internet, mobile phones and cameras, are potent agents of change for the nature of TR. The journey to work or the walk to the shops may increasingly become an opportunity for recreation, breaking down traditional distinctions between work and leisure for technologically-aware consumers able to use a variety of electronic entertainment devices and internet connections en route. This would form part of the transformation of the meaning of mobility (Urry 2004).

IT changes are also likely to contribute to further individualisation and personalisation of TR activities (Urry 2002b), with the supply of TR opportunities having to become more responsive to user needs. In terms of land use, this may lead to more spatially dispersed patterns of TR activity. Suppliers such as online intermediaries enable such diffusion, compared to the spatial concentration which is typical of mass tourism. Similarly in terms of recreation, individuals may be less tied to particular

sites, especially as more individualised activities replace collective ones such as organised team sports.

3.3 Policy and Governance: managing public goods and externalities

Many TR activities are characterised by public goods. Increasing pressures from other land uses, as well as growth in visitor numbers, will continue to pose challenges for public policy and governance. Increased partnership will be required in response to these challenges, working across activity sectors, sections of the community, and levels of governance. Significant challenges also arise from the socially disruptive nature of many TR land uses, whether raves, late night clubbing and drinking, or the use of off-road vehicles. These will require imaginative and integrated public policy responses.

3.4 Tourism and recreation in the face of climate change

Climate change will have major implications for TR activities and land use. UNWTO-UNEP-WMO (2008) recognises four main areas of global impact of climate change on tourism, and these can also be applied to recreation: direct, indirect, via mitigation policies, and societal impacts.

First, climate is an important resource for tourism in particular. While increasing summer temperatures may make the Mediterranean less attractive for UK tourists, this does not automatically translate into increased domestic tourism. Outbound tourists may adapt by visiting the Mediterranean outside the summer season, or by travelling to other international destinations. However, an increase in temperatures, more rain in winter, and more unstable weather patterns, may all impact on TR land uses (McEvoy et al., 2006). Cities may also be affected as temperatures rise, leading to the need to enhance public spaces, with more vegetation to provide shade and softer grassed spaces in place of heat-reflecting concrete. Outdoor lifestyles may also become more popular, involving activities in the home space (in the garden for example) and in local public and private 'TR spaces'.

There may also be two contradictory pressures (WTO 2008): on the one hand, the need to enhance water supplies in the summer, to maintain private and public green spaces and, on the other hand, for more all-weather tourism facilities, whether for sporting events or recreational shopping, in the face of increased winter rain and more unstable weather.

Secondly, climate also has direct impacts on TR via its effects on other elements of environmental systems. Sea level increases may threaten many existing coastal destinations for TR activities, especially highly sensitive ecosystems such as the Norfolk Broads (Natural England 2009). Footpaths and cliffs may suffer from increased soil instability. Flooding may threaten lowland ecosystems and tourist sites (Becken and Hay, 2007). Climate change could also lead to vegetation changes which may undermine the attractiveness of socially constructed highly-valued rural landscapes. Will the romanticised visualisations of the British countryside beloved by both tourists and recreationists survive such change?

Thirdly, tourism may be affected by climate change mitigation policies and practices, most notably measures to reduce international (mainly air) travel (see 3.7 below).

Finally, climate change is considered likely to affect income growth and political stability in some countries, which will have implications for tourism: the UK is not considered especially vulnerable in this respect and may, indeed, benefit in terms of tourism flows.

3.5 Tourism, uncertainty and risk

Tourism, and to a much lesser extent recreation, are highly susceptible to perceptions of uncertainty and risk. Aside from climate change, the global economic recession which commenced in 2008 is already influencing TR activities via perceptions of risks associated with incomes and savings, leading to decreases in planned trips, reduced consumer expenditure on recreation and more emphasis on cheaper alternatives. WTTC (2009) reports that after four years when global tourism and travel GDP grew by 3.6 per cent per annum, growth fell to just 1 per cent in 2008, and was expected to decline in 2009. Past trends show that 9/11, the July

2007 bombings in London and foot and mouth disease in the UK in 2001 all had significant effects on inbound tourism. This evidence suggests that there are usually rapid recoveries in visitor numbers, especially in domestic markets, and that TR is seen as a fundamental consumer activity. In spite of short-term declines, it will continue to increase in importance. The WTTC (2009) predicts that – partly because of the relative devaluation of the pound - the UK will have the ninth highest growth rate in international tourism earnings in 2009, as well as the fifth highest level of national spending on tourism.

3.6 Ageing: growing silver-segment recreation

Significant growth in TR is likely to stem from the ageing baby boomer generation expanding the so-called silver segment of consumers, a trend that we have already noted for recent years (Euro Direct 2002). Baby boomers are expected to live longer and have greater propensity to travel, to be more active and to embrace healthier activities. This is likely to lead to further marked increases in rural and urban visits, particularly to engage in activities such as walking, cultural events and visiting heritage attractions. Other interests likely to benefit from this demographic shift include wildlife tourism and visits to national parks. We do not know how far the TR activities of first and subsequent generation migrants will converge with those of the dominant ethnic majority population or will remain distinctive, for example in preferring urban to rural land use locations, and in visiting friends and relatives.

3.7 Transport: Carbon-conscious travellers?

There is evidence of growing environmental awareness in the UK, expressed through concerns about carbon footprints and the impacts of climate change. This is linked to broader and longer-running debates about sustainable tourism, recreational practices and ethical tourism. People are increasingly having to make discretionary judgements regarding travel patterns, which involve balancing different goals, motivations and values. Mintel (2007) found 53 per cent of consumers were concerned about climate change, with 37 per cent acknowledging that holiday air travel was having negative effects on the environment. However, only 20 per cent said they were willing to take practical steps to lessen such impacts. There are also

significant transport impacts from the growth and changing geographical distribution of recreation, but these have received less attention than tourism air travel. Such concerns are increasingly shaped by government policies which increase real travel costs, either to reflect wider social and environmental costs or to reduce public subsidies to transport. Whether this leads to shifts from international to domestic tourism, or from long to short distance recreational trips, depends on such policies as well as on energy costs and technology.

Initial evidence during the economic downturn in the second half of 2008 suggests that consumers are reluctant to pay higher environmental taxes in the face of recession. It is difficult to predict how far individuals will voluntarily adjust their TR behaviour, or how they will respond to state-imposed price increases. There is also uncertainty as to how any such shifts will influence the balance between inbound and outbound international tourism, and the regional and intra-regional distributions of domestic tourism and recreation.

3.8 Changing consumption preferences: Couch recreationists or sporting heroes?

There has been an increasing trend towards home-centred recreation, driven in part by technology changes, especially computer games and various forms of online entertainment. This has 'opened up a world of indoors, sedentary entertainment' with some 10 per cent of 1-18 year olds in the UK spending at least 20 hours on line per week' (Henley Centre 2005a). Arguably, further technological changes – driven by a highly innovative games industry - may lead to virtual tourism replacing physically mobile TR, with the UK increasingly becoming a nation of couch recreationists. Indeed, one of most popular uses of the internet is to search holiday and recreation sites, particularly amongst younger age groups.

However, given the social content of most TR activities, there are limits to the extent that virtual travel replaces corporeal travel. 'The obligations of co-presence' (Urry, 2002b) remain important. Face to face contacts remain essential to the sociability which is often central to TR experiences, although younger generations may be

becoming socialised via use of social network sites to more virtual and less proximate forms of sociability.

The establishment of a link, albeit complex, between health and recreation (Hardman and Morris 1998) is also likely to contribute to the growth of outdoor recreation. This has been taken up by a variety of public health campaigns emanating from the health sector, as well as highly targeted campaigns such as Natural England's *Walking the Way to Health Initiative*. Growing health concerns may lead to increased active recreation (Henley Centre 2005a), although this is likely to be socially selective, as the evaluation of the Natural England campaign suggests (Natural England 2006). It also seems likely that the 2012 Olympics will have an impact on interest in participatory recreational activities involving sport and well-being (DCMS, 2005). The overall outcome could be increasing social polarisation between physically and sportingly highly inactive and highly active population segments: will we see a society of 'couch recreationists' and 'sporting heroes'? And to what extent will the latter require more dedicated facilities as opposed to shared use of the countryside and other spaces?

3.9 The growing internationalisation of tourism

The amount of domestic tourism has been relatively static in recent years, due in part to the continuing strong growth of outbound tourism. The high elasticity of demand for foreign holidays means that further growth in outbound tourism can be expected, subject to shifts relating to environmental concerns, transport costs, and exchange rate movements.

It is therefore likely that future tourism pressures on land use will stem particularly from inbound tourism. The current global model of tourism flows is likely to change significantly as disposable income and, eventually, disposable free time impact on consumers in emerging market economies. The WTO (2003) estimates that this may contribute to a doubling of international tourism by 2020, which will impact on the UK's share of inbound visitors.

Inbound tourism will be boosted to some extent by the London 2012 Olympics, which will redefine TR land use in London and lead to an estimated increase of £81 million in revenue from visitors to the capital (DCMS, 2005). Their direct impacts will mainly be in the Lower Lea Valley, and there will also be a general impact on leisure facilities more widely. Evidence from previous Olympics suggests that the medium - term impact on tourism may be modest, particularly for a city with an established reputation as a tourism destination (Kasimati 2003). The regional impacts will be highly polarised in and around London, and in sites such as Weymouth which will host the sailing events.

4 CONCLUSIONS: LAND USE IMPLICATIONS

The best available assessments of future trends suggest that long term changes in income (beyond the crisis manifest from 2008) and disposable time, together with socio-demographic changes, are likely to contribute to a sustained and increasing demand for tourism and recreation. However, the way in which this impacts on land use will be mediated by regulatory and behavioural changes related to climate shifts and risk and uncertainty, and to advances in information technology. The outcome of these changes will be evident in the distribution of land use changes between the UK and abroad, within different types of rural, urban and coastal environments, and between localised and more distant forms of TR. There will also be changes in the relative spatial concentration versus dispersal of land use for TR, as well as the multiple use of space for TR and other activities

Developments in IT-based entertainment, and the increasing perception that some routine activities such as shopping undertaken on the internet constitute leisure activities, are likely to lead to the home becoming an increasingly important locus of recreation (Henley 2005b: 12). To some extent, this will displace other forms of recreational activity at home, but it may also dampen the growth of out-of-home land use demands for TR activities. Modern IT equipment is relatively compact so there are unlikely to be major impacts in terms of housing specifications.

While overall tourism growth will probably continue, its geography is likely to change. The UK will probably see a relative shift from net outbound to net inbound tourism,

reflecting changes in the global distribution of disposable income. Historically, inbound tourism has focused strongly on London, which receives about 50 per cent of such travel. Future long-haul tourism will probably continue to focus on London, compared for example to continental Europe which has a dense network of linkages to different UK regions. This will mean continued demand for tourism-related accommodation, transport, retailing and transport in the UK, but especially London. There are two major caveats to note, however: changes in climate and risk-related behaviour have the potential to significantly change demand in international tourism.

Looking at domestic TR, we agree with the Henley (2005b) view that ‘Almost every outdoor space can be considered a potential “place” for outdoor recreation’. Growth in demand for TR is likely to lead to increased pressures in the forms of multiple land uses, whether in city centres, suburban or rural areas. Within this overall pattern, there will be particular land use pressure points. City centres will continue to be the focus of cultural activities, but the long-term shift to out of town sites for shopping and activities (cinemas, bowling, leisure centres) will mean that urban TR activities are increasingly bipolar. The strong recent growth in rural TR activities is likely to continue as a counter to the urbanisation of culture (Healey 2005b).

One of the major land issues that arises from these changes is that TR activities occur not only in dedicated but in multiple use sites, and this means that their management is subject both to TR and non-TR bodies. This highlights the need for land use management which is sensitive to multiple uses of such spaces, particularly in fringe urban areas and in city centres. This poses questions about the zoning of TR activities. More restrictions may be required in some highly sensitive rural areas to conserve fragile ecosystems, and these may run counter to long-term pressures for increased access to the countryside. Two new national parks have been approved in the UK in recent years, while the borders of the Lake District and Yorkshire Dales parks are under review. Pressures are likely to grow both for more landscape protection and for designated areas of limited access. More research will be necessary to address how the changing relationship between public goods and land use needs to be rethought in terms of changes in TR. The future growth of second homes, driven in part by TR motivations, will require careful monitoring given that it is one of the most sensitive (and exclusive) of all land uses.

Finally, there are contradictory spatial trends in TR activities, with tendencies for both centralisation (in city centres, edge of city sites etc) and for dispersal. Technological change such as innovative off-road vehicles, satellite navigation, and innovative outdoors recreation using IT has increased the potential for more dispersed TR activities. Some of these may develop consistent behaviour over time, leading to relatively stable patterns of new, dispersed land use.

REFERENCES

- Allnutt, D., 2004. *Tourism Statistics Review Initiative: Review of Tourism Statistics*. ONS/DCMS, London.
- Becken, S. and Hay, J., 2007. *Tourism and Climate Change: Risks and Opportunities*. *Climate Change*, Channel View Publications, Clevedon.
- Bramwell, B. and Lane, B., 2000. Collaboration and partnership in tourism planning. In Bramwell, B. and Lane, B. (Eds), *Tourism Collaboration and Partnerships: Politics, Practice and Sustainability*, Channel View Publications, Clevedon.
- Buhalis, D. and Law, R. (2008) 'Progress in information technology and tourism management', *Tourism Management* 29: 609-623
- Buhalis, D. and Ujma, D., 2006. 'Intermediaries: travel agencies and tour operators'. In: Buhalis, D. and Costa, C. (Eds.), *Tourism Business Frontiers: Consumers, Products and Industry*, Elsevier, Oxford, pp. 172-80.
- Cope, A., Doxford, D. and Probert, C. 2000. Monitoring visitors to UK countryside resources The approaches of land and recreation resource management organisations to visitor monitoring *Land Use Policy* 17: 59-66
- Countryside Agency, 2005, *What about us? Challenging Perceptions: Under-represented Groups' Visitors Needs*, Countryside Agency
- Countryside Recreation Network, 2001. Social Exclusion in Countryside Leisure in the United Kingdom: The Role of the Countryside in Addressing Social Exclusion. Countryside Recreation Network
- CPRE, 2005. *Mapping Tranquillity. Defining and Assessing a Valuable Resource*. CPRE, London
- DEFRA, 2007. <http://statistics.defra.gov.uk/esg/statnot/Diver07.pdf> (accessed 3 October 2007).

- DCMS, 2005. *Olympic Games Impact study: Final Report*. Department for Culture, Media and Sport, London.
- DFT, 2005. *Focus on Personal Travel*, Department For Transport, London
- Dobruszkes, F., 2006. 'An analysis of European low-cost airlines and their networks'. *Jnl. of Tpt. Geog.* 14, 249-264
- Euro Direct, 2002. *The UK Tourism Classification for the English Regional Tourist Boards*. Euro Direct, London
- Fisher, K and Gershuny, J., 1999. *Leisure in the UK Across the 20th Century*. Institute for Social and Economic Research, Colchester
- Gallent, N., Mace, A., and Tewdwr-Jones, M., 2005. *Second Homes: European Perspectives and UK Policies*, Ashgate, Chippenham
- Hall, C. M. and Williams, A. M., 2008. *Tourism and Innovation*. Routledge, London.
- Hall, C. M., Williams, A. M. and Lew, A. (2004), 'Tourism: conceptualizations, institutions and issues'. In Lew, A., Hall, C. M. and Williams, A. M. (2004), *A Companion to Tourism*, Oxford: Blackwell.
- Hardman, A.E. and Morris, J. N. (1998) .Walking to health. *British Journal of Sports Medicine*; 32(2):184.
- Henley Centre Headlights Vision, 2005a. *Demand for Outdoor Recreation*. *Outdoor Recreation Strategy Research Paper No. 2*. Countryside Agency, Cheltenham
- Henley Centre Headlights Vision, 2005b. *Impact of Outdoor Recreation*. Research Paper No. 6.
- House of Commons: Culture, Media and Sports Committee, 2008. *Eighth Report of Session 2007-8, Vol 1*. London: House of Commons.
- IRN Research, 2002. *Current Developments in the UK Outbound Travel Industry*, IRN Research, Hampton
- Kasimati, E., 2003. 'Economic aspects and the summer Olympics: a review of related research', *International Journal of Tourism Research* 5, 433–444
- Law, C.M., 2002. *Urban Tourism: the Visitor Economy and the Growth of Large Cities*, 2nd ed., Continuum, London
- McEvoy, D., Handley, J. F., Cavan, G., Aylen, J, Lindley, S. , McMorrow, J. and Glynn, S., 2005. *Climate Change and the Visitor Economy: the Challenges and Opportunities for England's Northwest*. Sustainability Northwest, Manchester and UKCIP, Oxford.
- Mintel, 2006. *Leisure Time – UK*, Mintel International Group, London

Mintel, 2007. *Green and Ethical Consumers: Special Report*. Mintel International Groups, London.

Muirden, M. and Martin, B., 2004. *Future Trends in Lifestyles and Leisure*. Scottish Enterprise, Glasgow.

National Trust, 2001. Valuing our Environment – Summary. National Trust, London. Available from:
http://www.nationaltrust.org.uk/main/conservation/valuing_environment.html
(Accessed 5th October 2007).

Natural England, 2006. *Evaluation of Chanves to Physical Activity Amongst People who Attend the Walking the Way to Health Initiative – Prospective Study*. Natural England.

Natural England, 2009. *Responding to the impacts of climate change on the natural environment: The Broads*, Natural England report NE114

Pine, B.J. and Gilmore, J.H., 1999. *The Experience Economy: Work is Theatre and Every Business a Stage*, Harvard University Press, Boston

Sharpley, R., 2004. 'Tourism and the countryside' In C. M. Hall and A.M. Williams (eds), *A Companion to Tourism*, Oxford: Blackwell

Shaw, G., 2007. 'Lifestyles and changes in tourism consumption: the British experience'. In: Reuber, P. and Schnell, P. (Eds.), *Postmoderne Freizeit und Freizeitträume*, Schmidt, Berlin

Shaw, G. and Coles, T., 2007. 'The resort economy: changing structures and management issues in British Resorts'. In Agarwal, S. and Shaw, G. (Eds.) *Managing Tourism Resorts*, Channel View Publications, Clevedon

Shaw, G., Thornton, P., Williams, A. M., 1998. 'The United Kingdom: market trends and policy responses'. In Williams, A. M. and Shaw, G. (Eds.), *Tourism and Economic Development: European Experiences*, third edition, Wiley, Chichester, pp 199-220

Shaw, G. and Williams, A. M., 2002. *Critical Issues in Tourism*, second edition. Blackwells, Oxford.

Shaw, G. and Williams, A. M., 2004. *Tourism and Tourism Spaces*. Sage, London.

Shaw, G. and Williams, A. M. 2009. 'Knowledge transfer and management in tourism organisations: an emerging research agenda', *Tourism Management*, 30 (3): 325-335

Social Trends, 2008. *Social Trends*, Office of National Statistics, London

Thornton, P., Williams, A. M. and Shaw, G. 1996. 'Revisiting time space diaries: an exploratory case study of tourist behaviour in Cornwall', England. *Environment and Planning A*, 29, 1847-1867

Travel Trends, 2008. Travel Trends, Office for National Statistics, London

Ttglive (2009), 'Cosmos to extend use of Eurostar' www.ttglive.com/c/portal (accessed June 2009)

Tyler, D. and Dinan, C. 2001. The role of interest groups in England's emerging tourism policy network. *Current Issues in Tourism* 4, 210-252.

UKCIP (2003) *Climate Change Scenarios for the UK : the UKCIP scientific report*, Oxford

UKERC (2007) 'Tourism in a Low Carbon World' conference summary

UKTS, 2007. UK Tourism Survey, London

UKTS, 2003. UK Tourism Survey, London

UNWTO, UNEP and WMO (2008), *Climate Change and Tourism: Responding to Global Challenges*, Madrid: UNWTO. and UNEP, Paris.

Urry, J., 2002a. Mobility and proximity. *Sociology* 36, 255-274.

Urry, J. 2002b, *The Tourist Gaze, second edition*. London: Sage

Urry, J., 2004. 'Connections', *Environment and Planning D: Society and Space* 22: 27-37

VisitBritain, 2004. Destination England – How Well Does It Deliver? www.visitbritain.com/ukindustry (accessed Nov. 08)

VisitBritain, 2005. What is the Future of Domestic Tourism to 2015, VisitBritain, London

Williams, A. M. and Shaw, G., 1997. 'Riding the bid dipper: the rise and decline of the British seaside resort in the twentieth century'. In G. Shaw and A. M. Williams (eds), *The Rise and Fall of British Coastal Resorts: Cultural and Economic Perspectives*, London: Mansell.

WTO, 2003. *Tourism 2020 Vision*. World Tourism Organization, Madrid

WTO (2008), *Climate Change and Tourism: Responding to Global Challenges*, UNEP/Earthprint

WTTC, 2009. *Travel and Tourism Economic Impact*, World Travel and Tourism Council

WWF-UK (2002) *Holiday Footprinting : a practical tool for responsible tourism*, London.