

RECONOMICS

The Economic Impact of Outdoor Recreation





FOREWORD

The great outdoors stands for so much - and for me and so many people across the UK it is a gateway to adventure and to so much wonder.

Every day millions of people find their joy outside, whether walking, riding, rowing, or flying - not just Great British eccentrics or outliers - but the mainstream. Every day people who just love being active in the fresh air.

As this report shows, the outdoors also makes a huge contributions to the health, wealth and happiness of the nation.

The diversity of the outdoor recreation on offer in the UK is incredible. Activities like ballooning, kayaking, caving and rambling - but without the amazing spaces around the country, none of these activities could take place.

The fact that you can do everything from skiing to scuba diving within these shores is an incredible gift and we should be doing everything we can to make the most of these opportunities. That means working hard to protect the environment around us and also working to open it up so that as many people as possible can enjoy it.

The great outdoors isn't a museum, and outdoor recreation isn't a passing fad. The activity it enables changes lives, by creating prosperity, by improving health, developing confidence and passing on life skills.

This report lays out the wide range of benefits of getting active outdoors both for the individual and for society. But if we are to maximise these benefits we need politicians to get on board too.

Let's have a long-term plan for how we get more people active outside and, if we have a minister for cities, why can't we have one for the countryside and all the activities that take place there too? That can only be a positive step for our nation.

Bear Grylls

CONTENTS

2 THE UK'S FAVOURITE PASTIME

- 3 PARTICIPATION IN OUTDOOR RECREATION
- 4 WHAT IS 'OUTDOOR RECREATION'?
- 7 SPENDING TIME AND MONEY OUTDOORS

8 DRIVING THE VISITOR ECONOMY

- 9 OUTDOOR STAYCATIONS
- 10 A HUGE ECONOMIC FOOTPRINT

12 CREATING JOBS AND SKILLS

- 15 AN INDUSTRY FOR ALL WEATHERS
- 16 THE OUTDOOR RECREATION WORKFORCE

18 PROMOTING A HEALTHY NATION

THE UK'S FAVOURITE PASTIME

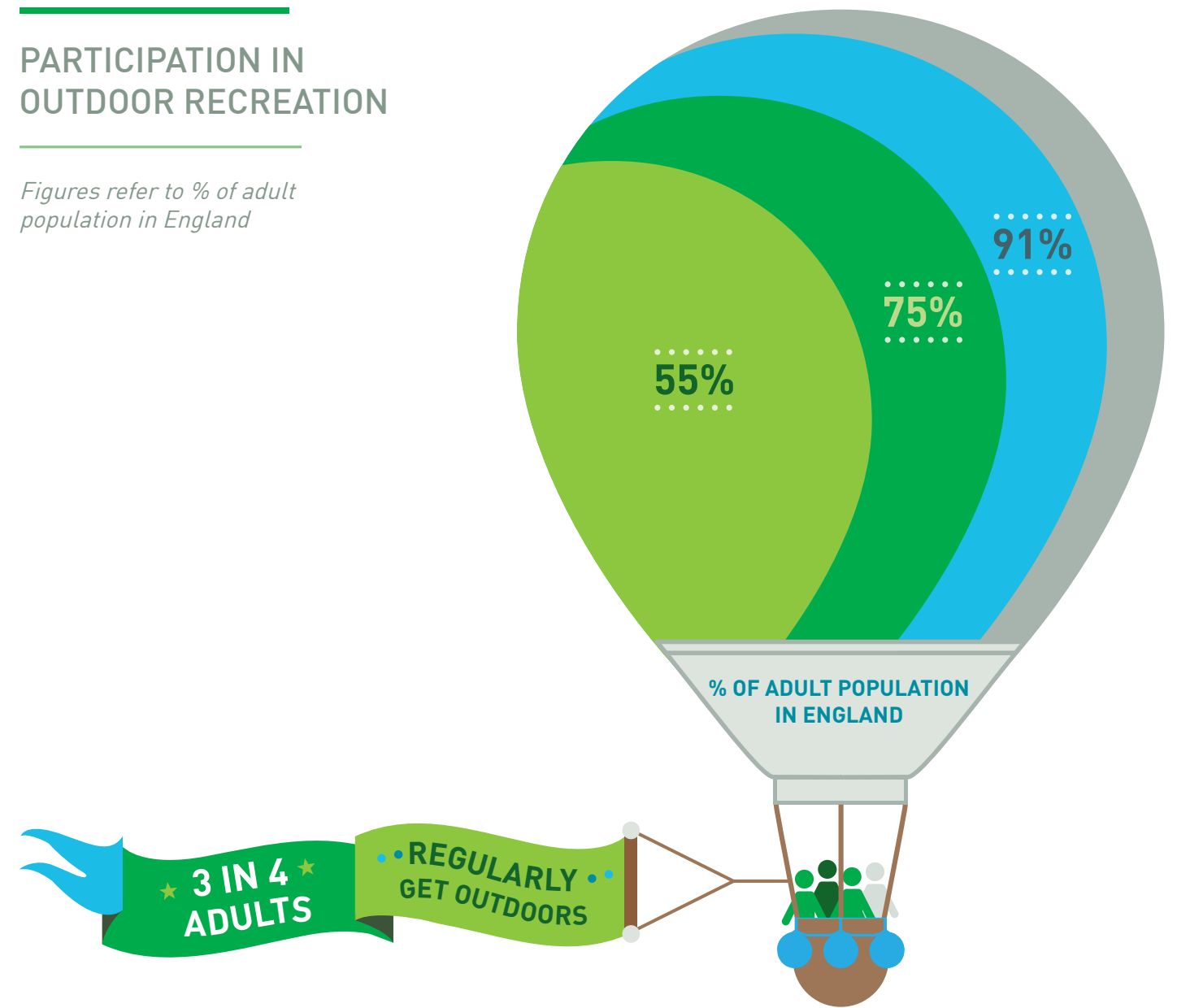


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AS A NATION WE LOVE TO GET OUTDOORS

PARTICIPATION IN OUTDOOR RECREATION

Figures refer to % of adult population in England



According to Natural England three in four adults in England made regular visits to the natural environment during 2012/13.

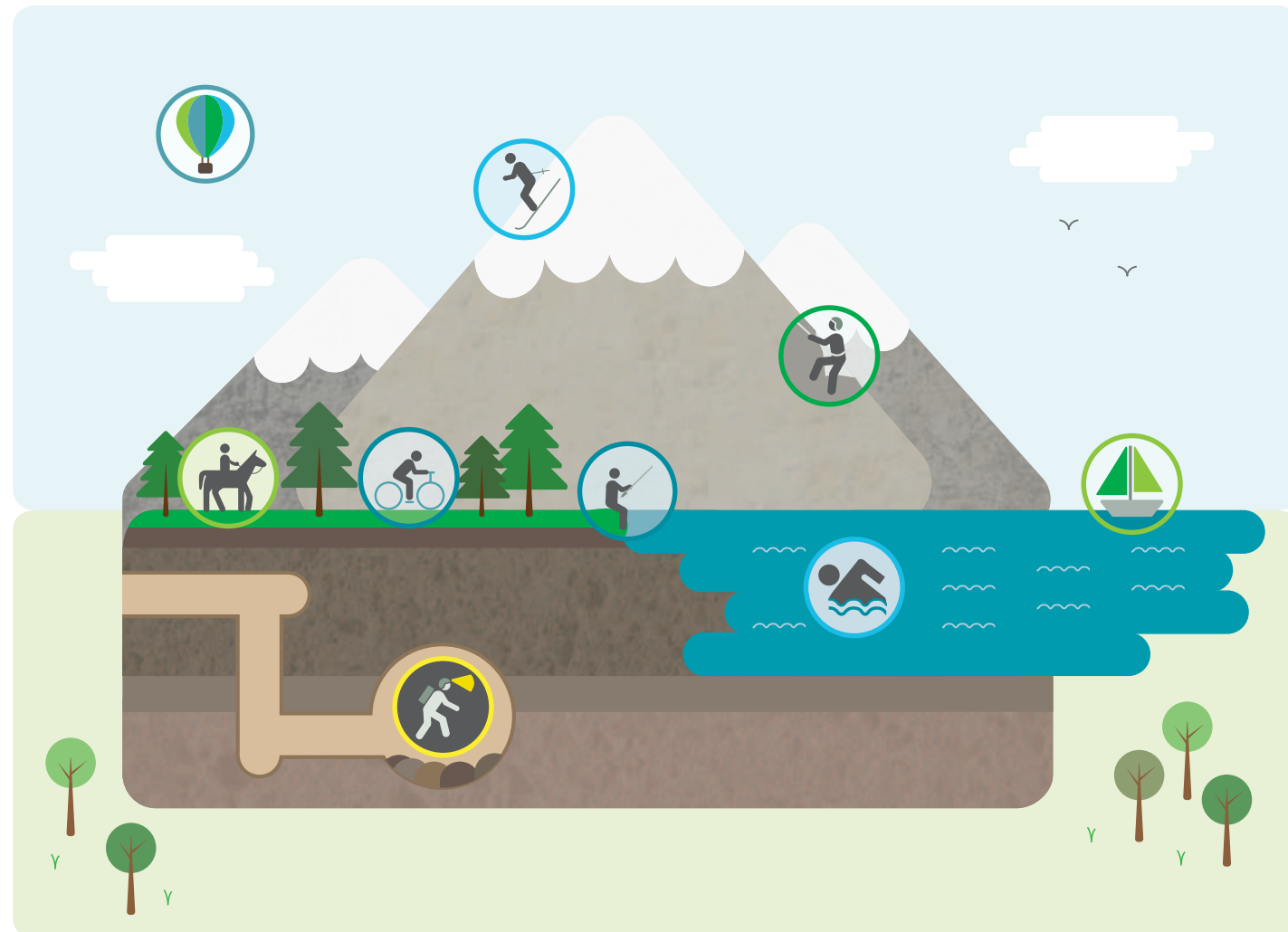
VISIT THE NATURAL ENVIRONMENT

- once a week
- once a month
- once a year

Natural England (2013)

WHAT IS 'OUTDOOR RECREATION'?

Outdoor recreation refers to any physical activity taking place in the natural environment. The activities below are just a few examples of what the Great Outdoors has to offer.



UNDERGROUND
Caving, Potholing

ON WATER
Angling, Canoeing,
Water Skiing

HIGH UP
Mountain climbing,
High ropes

IN WATER
Outdoor swimming,
Scuba diving

ON LAND
Walking, Horse
riding, Off-road
cycling

IN THE AIR
Gliding, Sky diving,
Paragliding



POOLE HARBOUR

In Poole Harbour water sports enthusiasts spend up to £105 a day on food and accommodation. Read more about how water sports supports the local economy at reconomics.works/watersport

Outdoor recreation takes many forms. It ranges from a gentle stroll down a country lane to a sky dive at 10,000 feet; it could involve a long climb up a mountain trail or a fast descent down an off-road track.

What all these pastimes have in common is that they get us physically active in the natural environment.

WHILE SOME SEEK PEACE AND QUIET, OTHERS WANT A HIT OF ADRENALINE

The range of motivations for getting outdoors is as wide as the list of activities on offer. While some seek peace and quiet, others want a hit of adrenaline. And whereas some of us get outdoors to stay healthy, others enjoy taking risks.

Outdoor recreation therefore offers both isolation and interaction, relaxation and exhilaration.

Whatever the incentive, the fundamental outcome is the same: enjoyment. When Britons get outdoors they spend on average over two hours experiencing what nature has to offer.

By offering so much to so many, it's not surprising that outdoor recreation is the UK's favourite pastime.

When individuals enjoy getting active in the natural environment society as a whole feels the benefit.

By stimulating tourism, creating jobs, developing young people and boosting health and wellbeing, outdoor recreation makes a significant contribution to the UK economy – an impact which is felt in every corner of the country.

Collectively our fields, forests, lakes, mountains, rivers, cliffs and beaches are the greatest leisure facility the nation has ever seen; a vast blue and green gym with no membership fee, and a sporting arena like no other.

The Great Outdoors is one of the UK's greatest assets, the full value of which is only realised when individuals experience it in person.

FAMILY FUN

"Our children have spent time with Dad, whittling sticks, learning how to cook in the open air and we have had great fun pitching a tent together, a real treat when Dad's mobility is limited."

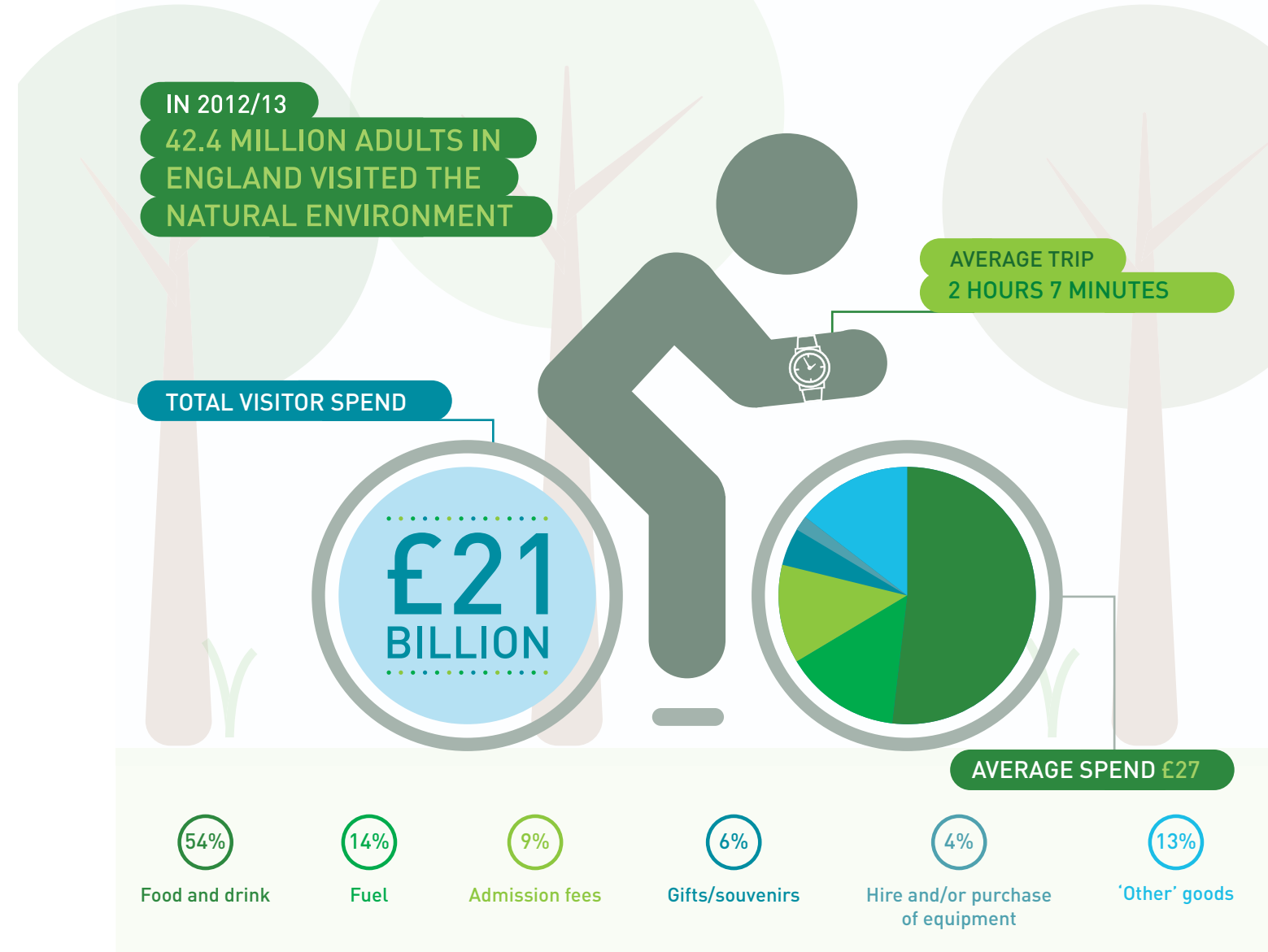
Read more about how camping and caravanning brings families together at reconomics.works/camping



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SPENDING TIME AND MONEY OUTDOORS

The economic impact of being active outdoors



Natural England (2013)

A VAST BLUE AND GREEN GYM WITH NO MEMBERSHIP FEE, AND A SPORTING ARENA LIKE NO OTHER

DRIVING THE VISITOR ECONOMY



Getting active outdoors doesn't necessarily mean staying in your back garden.

In fact outdoor recreation often prompts us to leave our usual surroundings and explore somewhere new – be it for a few hours or a couple of weeks.

Those who do so are participating in outdoor recreation as tourists, alongside the visitors who come to our shores to experience what the UK's Great Outdoors has to offer.

All of this activity has a significant economic footprint.

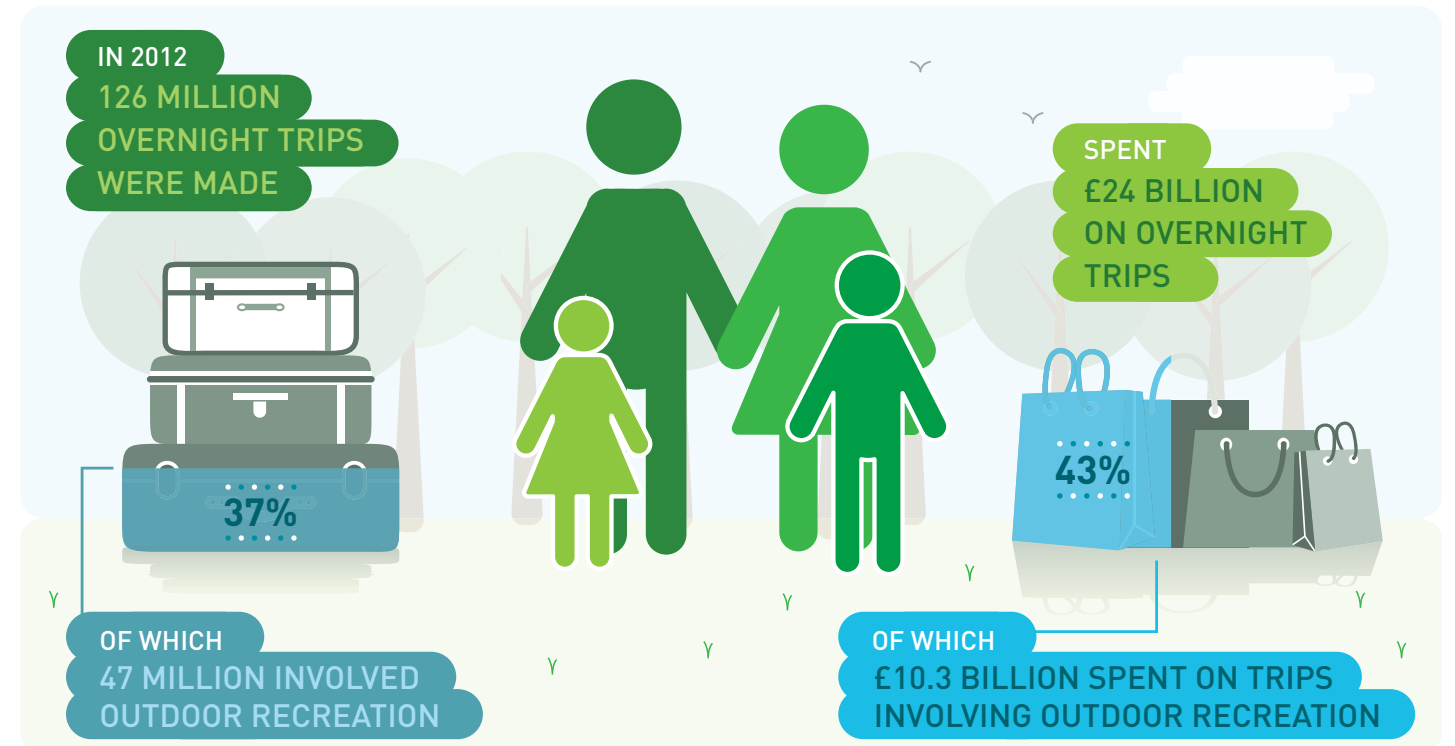
As the UK's sixth largest industry, tourism in all its forms is worth £126.9 billion to the economy and employs over 9% of the country's workforce.

The contribution of outdoor recreation to this important sector is considerable.

OF ALL OVERNIGHT TRIPS TAKEN BY BRITS IN 2012, 37% RELATED TO TRIPS INVOLVING OUTDOOR RECREATION – EQUATING TO A FIGURE OF £10 BILLION

OUTDOOR STAYCATIONS

Overnight domestic tourism in Great Britain involving outdoor recreation in 2012



Visit England (2014)

The benefits of this spending are felt by those who meet the needs of tourists by providing the products, services and infrastructure – which together make up the Visitor Economy.

The Visitor Economy is particularly important for rural areas, whose prized landscapes bring people from far and wide. The more rural an area is, the more likely it is to rely on income from tourism.

Visitors to these communities value being able to access all the countryside has to offer; if outdoor recreation is the heart of these local economies, then paths, woodland, coastline and waterways are its arteries.

THE MORE RURAL AN AREA IS, THE MORE LIKELY IT IS TO RELY ON INCOME FROM TOURISM

It is unsurprising, then, that the temporary closure of the countryside in 2001 in response to the Foot and Mouth Disease outbreak carried a heavy economic cost; the associated loss in tourism revenue nationwide was estimated to be £7.73 billion.

Just as curbing access to the environment can be damaging, there are countless examples of how investment in outdoor infrastructure can offer a significant return.



© Countryside Alliance

GROUSE SHOOTING

One in five households in the parishes of Blanchland and Hunstanworth benefit directly from grouse shooting. Read more at reconomics.works/shooting

A HUGE ECONOMIC FOOTPRINT

The importance of walking to the Visitor Economy

IN 2003

WALKING TOURISM WAS ESTIMATED TO GENERATE UP TO...

£2.76
BILLION
FOR THE ENGLISH
ECONOMY

AND SUPPORTED UP TO...

245,500
FULL-TIME
EQUIVALENT JOBS

M. Christie and J. Matthews (2003)

The South West Coastal Path, for example, is widely recognised as an important driver of tourism in the region.

The route costs £500,000 a year to maintain but is estimated to generate £436 million for the regional economy every year and supports 9,771 jobs.

And it's not just the South West...

OUTDOOR RECREATION DRIVES THE VISITOR ECONOMY IN ALL CORNERS OF THE UK



WALES COAST PATH

The world renowned **Wales Coast Path** is worth £32 million to the economy. Read more at reconomics.works/walespath

Visiting anglers are estimated to have added an estimated £400,000 to the remote community of Assynt. Read more about their contribution at reconomics.works/angling



©Brown A (Substance)

The Hadrian's Wall Path brought in an estimated £19 million for the surrounding communities over 4 years. Read how Vicky and Peter Moffitt's business has benefitted at reconomics.works/hadrianspath



©Vicky Moffitt

Boating tourism contributed £3.7 billion to the UK in 2012-13. Read about one example of a family business which has contributed at reconomics.works/boating



©Richardsons Boating Holidays

Marianne and Colin Walford's trail riding business brings benefits to the local visitor economy in Mid-Wales. Read more at reconomics.works/trailriding



©Marianne Walford

Off-road cycling attracted 33,000 visitors to Haldon Forest Park and generated £704,505 in 2012. Read the full story at reconomics.works/cycling



©Forestry Commission

CREATING JOBS AND SKILLS



The UK has a rich offering when it comes to outdoor recreation. But even the natural environment relies on people to keep it accessible.

There is a far-reaching network of businesses, non-profit organisations and individuals working behind the scenes to ensure that people can enjoy the outdoors as easily and as safely as possible.

Here is just a snapshot of the broad network that makes it possible for people of all ages and abilities to enjoy the outdoors, employing thousands of people in the process.

THE GOVERNING BODIES

who promote and deliver opportunities for people to participate in their activity

THE ORGANISERS OF COMPETITIVE EVENTS

who provide memorable experiences for participants and spectators



©British Horse Society

BRITISH HORSE SOCIETY

The British Horse Society's network of 200 Access and Bridleways Officers work to ensure riders and carriage drivers across the country have access to safe routes. Read more about the Society's work reconomics.works/bhs



GIANT'S CAUSEWAY

In County Antrim the Giant's Causeway Coast Sportive brought in £169,730 for the local area in 2013. Read about the impact for local businesses at reconomics.works/compete

THE LANDOWNERS

who provide the arena for outdoor recreation

NATIONAL TRUST

Read about how the National Trust is using its estates to promote outdoor activity and boost income at its properties at reconomics.works/nationaltrust



©The National Trust

THE RETAILERS AND MANUFACTURERS

who produce and sell outdoor clothing and equipment

CHAIN REACTION

Chain Reaction Cycles is the world's largest dedicated online retailer of cycling equipment and generates £16 million for the Northern Ireland economy. Read about the company's success at reconomics.works/retailers



©Chain Reaction Cycles

THE STAFF

of outdoor centres offering new ways to enjoy the outdoors

GO APE

Twelve years after the first facility opened in Thetford Forest, Go Ape is now a growing international brand. Read about its success at reconomics.works/goape



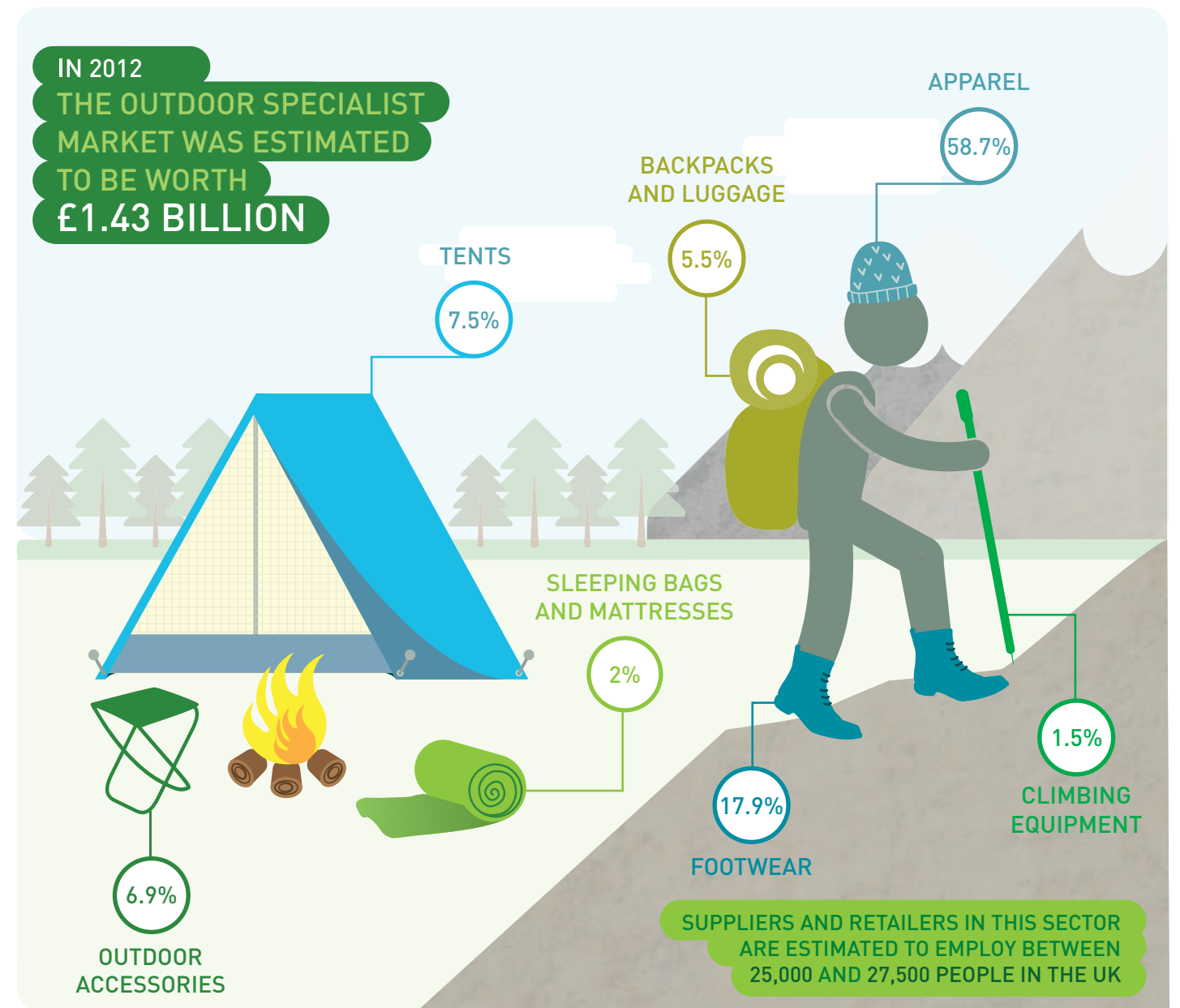
©Go Ape

In the outdoor goods industry alone there are thought to be 27,500 people employed by suppliers and retailers of clothing, footwear and equipment (but excluding

activity-specific equipment such as bikes) – an industry worth an estimated £1.43 billion in 2013.

AN INDUSTRY FOR ALL WEATHERS

The value of the outdoor specialist market



Profile UK/Outdoor Industry Association (2013), European Outdoor Group (2012)

THE OUTDOOR RECREATION WORKFORCE

Estimates of employment supported by outdoor recreation



Sources included in "The Economic Contribution of Outdoor Recreation: The Evidence", Sport and Recreation Alliance (2014)



* denotes estimate for number of people directly employed within that sector.

In addition to the paid workforce the outdoor recreation network also relies heavily on the time, energy and expertise of volunteers who share a passion for their activity with countless others.

These volunteers are the stewards of the natural environment and ambassadors for the outdoors. Without their contribution far fewer of us would be able to take advantage of what the Great Outdoors has to offer. Their passion and dedication goes to show that outdoor recreation really is the UK's favourite pastime.

This commitment not only benefits the wider population – it also has considerable benefits for the volunteers themselves. Through training, personal development and networking they benefit from enhanced knowledge, understanding, confidence and competence which in turn may boost their earning power.

Younger people are particular beneficiaries of the employment and volunteering opportunities within the outdoor recreation network. A high proportion of work in the sector is seasonal, and offers many young people their first taste of working life.

Outdoor activities can also be an important vehicle for engaging and developing young people, as exemplified by initiatives like U Canoe, Get Hooked on Fishing and the Outdoor Partnership.



 **VOLUNTEER LOCK KEEPERS**
Volunteer lock keepers are the stewards of canals in England and Wales. Hear from volunteer Gill Anlezark at reconomics.works/volunteer



U Canoe encourages young people to take part in canoeing and provides training and career development for student volunteers. Read more about the scheme at reconomics.works/ucanoe



Get Hooked on Fishing uses angling as an intervention tool to engage socially excluded young people. Read more about the difference it makes at reconomics.works/gethooked



The Outdoor Partnership uses outdoor recreation to improve opportunities for people in the most disadvantaged and isolated communities in North West Wales. Read more about their work at reconomics.works/partnership

PROMOTING A HEALTHY NATION



The health benefits of an active lifestyle are well documented – and so important are they that physical activity is often referred to by experts as a “wonder drug”.

And yet as a nation too many of us are not taking advantage of these benefits, which costs over £10 billion in England alone.

This includes the direct costs to the NHS – accounting for 5% of the total budget – as well as the impact of 72,000 work days lost.

We know that outdoor recreation is good for the mind, body and soul. As such it has a very significant role to play in the challenge to get the nation more active and more healthy.

PROMOTING HEALTHY MINDS

Getting active outdoors is associated with lower levels of stress, tension and depression, and with increased self-esteem and energy levels. In fact, those who live in greener areas are more likely to feel healthier than their counterparts in urban environments.

Jake started the website **Climb Out** to share his experience of beating depression through climbing. Read his story at reconomics.works/climbout



©The Forestry Commission

INCENTIVISING US TO TAKE REGULAR EXERCISE

While outdoor exercise delivers the same physical benefit as an equivalent amount indoors, the added enjoyment of being outside can encourage us to be active more regularly.

Byrony Booth is one of the 70,000 people who walk regularly with Walking for Health. Read her story at reconomics.works/walking



©The Ramblers

BRINGING PEOPLE TOGETHER

The outdoors offers communities a valuable social space. Outdoor recreation can alleviate social isolation and promote integration.

“The social aspect is really important... Metal detecting is a very community-minded activity.” Read Brian’s story at reconomics.works/social



©The Forestry Commission

OFFERING SUSTAINABLE FORMS OF TRANSPORT

When people are able to walk or ride, not only do they move more but they also contribute to reduced levels of pollution and congestion.

It's estimated that if 10% of all trips were made by bike, the NHS in England and Wales would save at least £250 million a year.

ENGAGING PEOPLE OF ALL AGES AND ABILITIES

Outdoor recreation is an inclusive pastime. Governing bodies and activity providers are working hard to ensure that the opportunities to enhance health and wellbeing can be enjoyed by everyone.

The Caversham community travelled over 50,000 miles using smart card technology. Read about **Beat the Street** at reconomics.works/beatstreet



The **Connect 2 Blyth Estuary Green Travel Project** encouraged more people to travel actively and improved air quality. Read more at reconomics.works/travel



The **BattleBack** initiative uses gliding as a valuable tool for young soldiers' rehabilitation following life-changing injuries in Afghanistan. Read more at reconomics.works/battleback



The **Riding for the Disabled Association** is a charitable organisation offering therapeutic riding experiences to people with disabilities across the UK. Read more at reconomics.works/riding



While all of these examples show how getting active outdoors can contribute to reducing the cost burden arising from physical inactivity, there are some qualities that you can't put a price tag on.

This document has highlighted some of the major economic impact of outdoor recreation in terms of growth, employment, skills, productivity and wellbeing.

AN INTRINSIC VALUE WHICH CAN ONLY BE EXPERIENCED BY GETTING OUT THERE AND ENGAGING WITH NATURE

But underpinning all those important benefits is one fundamental message.

Simply put, outdoor recreation makes you feel better. It has a quality which can't be replicated within four walls; an intrinsic value which can only be experienced by getting out there and engaging with nature.

And that is why outdoor recreation is, and will remain, the UK's favourite pastime.



As a nation we love to get outdoors. Whereas some of us seek peace and quiet, others want a hit of adrenaline. Whatever the motivation, all of this activity makes a significant contribution to the UK economy – an impact which is felt in every corner of the country.

OUTDOOR RECREATION

- **IS THE UK'S FAVOURITE PASTIME:** three in four adults in England regularly get active outdoors.
- **DRIVES THE VISITOR ECONOMY:** people spending their day enjoying outdoor recreation spent £21 billion in 2012/13.
- **CREATES JOBS AND SKILLS:** walking tourism alone supports up to 245,500 full-time equivalent jobs.
- **PROMOTES A HEALTHY NATION:** outdoor recreation can make a significant contribution to tackling the £10 billion cost of physical inactivity.

All information presented in this report is taken from a fully referenced evidence document available at:

WWW.RECONOMICS.WORKS

The **Sport and Recreation Alliance** is the umbrella body for sport and recreation in the UK. Our 300 plus members are the governing bodies of sport and recreation – everyone from The FA to the Ramblers.

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WWW.SPORTANDRECREATION.ORG.UK

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