

*A Review of the Economic Value
of
Countryside Recreation and
Sports*

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Vital to Government Policy:

We believe that enhancing the cultural, sporting and creative life of the nation is a vital part of Government. They have a fundamental impact on the quality of life for all our citizens. They provide enjoyment and inspiration. They help to foster individual fulfilment and well-being. They help to bind us together as a community. They are important for the quality of education. They assist with the work of social regeneration”.

Chris Smith, Secretary of State for Culture Media and Sport, 1999

Section 1

Background, Context and Scope

Section 1 Background, Context and Scope

CCPR and *Sport England* commissioned *The Tourism Leisure and Environmental Change Research Unit* and partners at Sheffield Hallam University to review published evidence of the economic value of countryside recreation and sport.

The Context

CCPR and Sport England seek an analysis of published evidence on the economic value of countryside sport and recreation participation, including related employment. The purpose is to inform the relevant organisations and decision- and policy-making governmental bodies. It demonstrates the value and accountability of the field of countryside sport and recreation as a component of sport and recreation, of tourism, and of environmental activities broadly.

The research drew on examples from numerous published studies such as Beard *et al.* (2000), Cambridge Econometrics (2002), Christie and Matthews (2003) and many others. These are alongside information from extensive research on countryside, tourism, sports, environmental economics, and on landscape change and policy.

Central Council of Physical Recreation (CCPR)

The **Central Council of Physical Recreation** is the main association and network for organisations involved in relevant activities in the UK. It is an umbrella body for 270 UK and English national organisations for sport and recreation, with a vision of fair, accessible, and high quality sport and recreation for all. The CCPR mission is to lead the development of a vibrant, sustainable, and effective non-governmental and voluntary sector for sport and recreation.

Sport England

Sport England is the strategic lead for sport in England as identified in *Game Plan* (2002).

Establishing the industry baseline - Definition and Concept of Countryside Recreation and Sport

The Tourism Leisure and Environmental Change Research Unit found that whilst there is a significant body of research on countryside recreation and sport, a succinct or accepted definition of 'the industry' or 'sector' has not been established. As noted for the Horse Industry by the Henley Report (2004) a concise industry definition forms a key pillar for any work. It allows meaningful measurement, and an appreciation of the 'common ground' between the industry's component sectors. Taking a stand similar to Henley for horses, we define the industry as encompassing all activity that has countryside recreation and sport as its focus and activity that, in some reasonable capacity, caters for such an industry.

What is Countryside?

One reason why researchers and others have neglected this area of activity is the lack of a broadly accepted definition of the physical space in which countryside recreation and sports take place. Concepts of countryside and of rural vary across the British Isles and across the globe. It is easier to define rural and urban, though urban-rural fringe may present difficulties, but landscape with a 'countryside' element may

occur in both urban and rural locations. This problem is noted but the widest visions and definitions are taken. All relevant activities are included that take place in a relatively informal and relatively naturalistic landscape setting. The single proviso is that this setting should be important to the activity and the participants.

Sizing the Economic Value of the Countryside Recreation and Sport Industry: Developing an Effective Approach

There are key reasons why establishing the size of the countryside recreation and sport industry proves difficult. One is the fundamental nature of the industry or sector. Though it can be split broadly into amateur leisure activities and professional participants, the reality is that these are not exclusive. There are significant links and overlaps that must be considered. As noted by the Henley Report (2004) for the Horse Industry specifically, but applying across the whole sector too, the most important problem is the general lack of robust and transparent data on all elements of the industry. With such constraints, it is not feasible to apply standard economic sizing techniques to the countryside recreation and sport industry.

For the Horse Industry, the Henley Centre followed two routes constructing a quasi-expenditure approach to industry evaluation, using current available data, to give a 'best effort' approximation of the industry's current baseline. They make it clear, that there was no estimation of the degree of error in their figure. For the wider countryside recreation and sport industry, this raises serious problems. They then progressed to make recommendations for future data collection, and an appropriate methodology by which an evaluation, based on reliable data might be undertaken. Furthermore, they emphasise the need for a thorough understanding of key linkages between sectors. They suggested that this should be undertaken in order to provide the industry with a methodologically and empirically rigorous baseline. Our report mirrors and supports their assertions but for the wider countryside recreation and sport industry.

Henley (2004) suggested that the economic baseline of a countryside recreation and sport industry should be in terms of its *Gross Value Added*. They raise the importance of estimating Gross Output of the industry through observation of consumers' expenditure. This applies to all final consumption products. To obtain the Gross Value Added (GVA) the business expenditure on intermediate consumption must be subtracted from the original figure. This approach involves two stages:

- *Estimation of final consumption expenditure of the countryside recreation and sport industry and so Gross Output,*

This would require identification of all the final consumption goods/service categories existing in the industry and their summation as estimates for the corresponding expenditures. This can place a value on the countryside recreation and sport industry's Gross Output (market prices). For the Horse Industry (Henley, 2004) this value was around £3.4 billion, but is not robust.

- *Estimation of intermediate consumption expenditure for the countryside recreation and sport industry to derive Gross Value Added,*

Interestingly for their detailed study of the British Horse industry The Henley Centre found that there were insufficient data for a meaningful estimate of industry intermediate consumption and hence of Gross Value Added to be made. The situation is much more difficult for the wider countryside recreation and sport industry. Henley also identified of particular importance for the horse industry, the nature, and

extent of its informal economy with impacts on its contribution to economic sizing and associated strategy. The economic contribution of this activity may be found by means of end consumer expenditure data, but there are still problems. As suggested by Henley, disentangling the value of this activity from other sectors of industry and presenting a strategically useable understanding of it is a major undertaking. Even for the Horse Industry alone, it would require a thorough investigation supported by an extensive programme of ethnographic research. The implications of such an approach for countryside recreation and sport are even more resource demanding.

If it is desired to generate a more complete and robust picture of the baseline state of the countryside recreation and sport industry there will be a need for more comprehensive and reliable data. This will be on consumer expenditure and business revenues and costs. These will need to be supported more adequately by a broad and inclusive definition and vision of the scope of this important and exciting sector of the economy and of society.

Setting the Scene an Example of the British Horse Industry - Estimating a Baseline

Henley (2004) found that the available industry research gave some insight to a range of sizing issues. They emphasise that even for this closely specified activity the available data are incomplete, inconsistent, and questionably robust. They present key estimates:

- Current data suggest direct employment in the horse industry to be about 50,000 with total employment (including 'indirect') estimated between 150,000 and 250,000;
- Estimates of the number of consumers in the industry vary greatly with definition of boundaries:
 - 11 million consumers (23% of the population) with some interest in the industry; a -figure encompassing a wide range of participants from those who actually horse ride, to people who watch horse racing on TV;
 - 5 million consumers (11% of the population) actively interested in the horse industry; this is excluding those who only watch horse racing on TV;
 - 2.4 million people in Britain ride - from research by The British Equestrian Trade Association;
- Estimates for numbers of horses were from 600,000 to nearly one million.

The Henley (2004) study provides an excellent and focussed insight into the issues facing just one component of the countryside recreation and sport industry. Their findings are based on an understanding of the limitations of available data. But it should also be recognised that this is one of the more closely defined and well-documented parts of the wider industry.

Identifying and Addressing Key Strategic Issues

Assessing the economic and social impacts of an industry so diverse and multifaceted as countryside recreation and sport is a major challenge. There are some key steps, and it is important to develop a better understanding of participation and provision. This report begins to provide an overview of key social, demographic, and cultural trends that will be important to the future of countryside recreation and sport. The growth in the 'leisure economy' indicates real growth potential for the industry. Some parts of the industry such as small businesses and riding schools in the horse industry for example (Henley, 2004) have a serious risk of decline.

It is important to establish the structures to develop and implement a strategy for countryside recreation and sport. This industry is particularly fragmented and some key players fail to recognise their own roles and those of others. Furthermore, there is a lack of overall 'representation' for the overall sector. To maximise impacts and develop a successful strategy it is vital that stakeholders view the industry in its entirety.

A strategic approach is recommended that will identify key strategic issues to help unify and promote the industry. This approach should establish a ten-year target for achievement. To do this and with consultation amongst industry stakeholders at national, regional, and local levels, there will emerge key specific issues relating to future growth and development. These are likely to include:

- Development of 'joined up' thinking and practice in the promotion of countryside recreation and sport;
- Wider promotion of the countryside recreation and sport industry at all levels;
- Continued improvement of opportunities, support, and facilities;
- More effective monitoring of impacts;
- Establishment of coherent, industry-wide approaches and best practice in assessment and monitoring.

To facilitate the successful implementation of a long-term strategy an understanding of the wider operating context of the industry is essential. This report moves towards such an understanding.

Since many of the available data are not robust, further surveys and assessment will be necessary. As recommended specifically for the horse industry by the Henley (2004) report, this requires the establishment of the context and definition of the industry, and the acceptance of an appropriate methodological approach. It is essential to:

- Define the countryside recreation and sport industry, and describe its component sectors;
- Agree baseline data requirements;
- Summarise the availability, coverage, and reliability of existing socio-economic data on the industry and its sectors;
- Identify major gaps in data resource;
- Establish the baseline data gathering as required with proposals for filling the gaps;

The Core Industry

The core industry is centred on the nature of engagement of products and providers, and participants and consumers. They participate in the countryside recreation and sport industry at a variety of levels and ranging from professional to a more casual, leisure-based, interest. Participation in the countryside recreation and sport industry can be placed along a spectrum of engagement from professional through to leisure. Those whose involvement represents their main source of income are at the professional end of the spectrum, with others in it purely for leisure. In between is a range of semi-professionals, people as participants and providers whose interest is split between generating income and leisure activity.

Labelling as professional or leisure participants and providers does not imply that businesses that cater to the leisure sector of the countryside recreation and sport

industry are unprofessional. The definitions are based on the nature of engagement by the participant or provider. Not all of those involved in leisure activity are necessarily amateurs. The complexities and oversimplifications involved in categorising the industry in this way are obvious. However, to evaluate and size the industry means that simplification is inevitable.

Sub-sectors of the professional and amateur components of the industry can be identified for individual sectors. For the horse industry for example, these include professional horse ownership, breeding for commercial interest, affiliated sports (including the Olympic disciplines), horse and rider training activities, horse racing, horse shows, and the use of horses by the police and the army. The amateur leisure sub-sectors include horse ownership for personal leisure riding, breeding as a hobby activity, unaffiliated sports (hunting, polo *etc.*), casual riding lessons, trail riding and trekking centres, farm diversification into the leisure-based horse industry, and farm-based, non-riding, horse tourist attractions, including 'horse rescue' premises (Henley, 2004). Similar profiles could be presented for other component sectors of countryside recreation and sport.

Expenditure Flows

Research can assess the value of contributions by sector and sub-sector to the industry. These are aggregated to give estimated economic worth of the whole industry. As noted by Henley (2004) this is limited data availability and reliability. They found existing data on the horse industry to be '*largely inadequate*'.

Private leisure participants, for whom the activity is not a business, will spend money on many items. They will buy naturally items relating to their interests, clothing, equipment, perhaps specialist training, activity holidays, competitions, magazines, and books. They may also spend money at sites and facilities and visit relevant domestic tourist attractions. There may be overlap between components in that some of these goods or services may be purchased by both professional consumers and amateurs. This complicates economic analysis in that if purchased by professional organisations these materials or supplies may be classed as inputs to production, or '*intermediate consumption*' rather than final consumption. This can lead to double counting the value of these inputs if the two expenditure flows are summed. In a detailed analysis such as Henley (2004) for the horse industry, it was possible to separate '*final consumption*' from '*intermediate consumption*'. This is done by asking who has purchased the particular goods or services.

It is necessary to determine and present the final consumption products of the countryside recreation and sport industry. These are 'products' (goods and services) that a consumer may purchase and through which money flows into the industry organisations. These 'final' products do not re-enter the countryside recreation and sport industry process. As expenditure flows these are relatively easy to identify and measure. Expenditure is generated by consumer groups, via product categories, flowing through the range of provider organisations. These organisations are the closest to the product consumers. Each organisational sector may have money flowing from different product categories, and different organisations have income from the same product group, and the same consumers.

Neither participants nor providers have a permanent or fixed position in the industry spectrum. They are dynamic and move between activities. An individual may mix both amateur and professional roles, consumer / participant, and provider. These are further complications.

This problem is not unique to countryside recreation and sport. The problem is avoided by National Accounting by classifying economic units according to '*primary value added*' (their principal activity). Value added from secondary activities is then placed under the principal activity. Henley (2004) for the horse industry found that the extent of multi-activity production by sub-sectors was above average. As they demonstrate for horses, for countryside recreation and sport it is not possible to account for multi-activity production of sub-sectors in the absence of detailed information on sub-sectors, by primary and secondary activities. This difficulty mirrors the complexity of the countryside recreation and sport industry and confirms the challenge of its economic valuation.

Whilst many of the available datasets lack definition, Henley (2004) found that their sector of countryside recreation and sport had identifiable final consumption goods and services (such as riding lessons, livery, farriery services *etc.*). They used these as quantifiable sizing categories of spend, enabling an alternative '*best efforts*' approach to providing sub-sector sizing information for the horse industry. This is a shift from production units to a more product-focused approach. This was possible for their relatively closed study. It is not possible for a broader research such as ours. However, it does indicate a potential approach for future work.

Understanding the Dynamics

It is useful strategically to understand the links between countryside recreation and sport industry sectors and sub-sectors, with numerous and complicated dynamics and overlaps between them. The complex links between the industry sectors and sub-sectors are apparent through expenditure by consumers / participants into the industry via multiple, final consumption products / providers. The various enterprises supplying the products cater for customer bases that often overlap. There is a consequence of this in that promotion of a particular customer base in the countryside recreation and sport industry will benefit other components of the industry.

The Structure of the Report

Firstly, we establish a working definition of the countryside recreation and sport industry. The aim is to establish the boundaries of the industry and its relationship to component sectors, sub-sectors, and overlapping industries. This is a basic first step but central to subsequent economic sizing. As noted by Henley (2004) '*Establishing a definition of the industry is crucial for the transparency of an economic evaluation and is a fundamental pillar of strategic thinking.*'

We develop this theme to describe and establish the context and background to the countryside recreation and sport industry. This includes examples to establish the types and potential sizes of economic impacts.

A summary of different approaches to 'sizing' the economic contribution of an industry based on National Accounts approaches used for other industries is given. We discuss the issues and problems for economic assessment and sizing of the countryside recreation and sport industry. A key problem with previous studies is the lack of transparency concerning the method of measurement used. We assess this and discuss the implications, but do not attempt any primary research to address the issues. A useful discussion and case study are presented by Henley (2004).

The report then includes a collation of key studies and datasets. These are then used to develop a very crude estimate of the size of likely economic impacts of this

industry. It must be realised that due to the limitations of the data, these calculations are for illustrative purposes only. The end figure for the countryside recreation and sport industry baseline is not a definite estimate of contribution to the economy, or to the Exchequer. Such an output would require significant and costly primary research.

Following the establishment of economic baselines, the report suggests key strategic issues for the countryside recreation and sport industry in terms of its socio-economic impacts. We present an outline strategic framework for future work.

Comparisons and Synergies: Tourism and Sport

With difficulties in defining relevant activities (i.e. what is included and what is not) it is useful to consider closely associated sectors. In particular, it is helpful to draw on the extensive literatures and databases of those areas that are well researched and analysed for their economic impacts.

Our ongoing research suggests that the three most useful and relevant areas of activity to consider are tourism, sport, and environment. All of these are more or less clearly defined sectors, and they all relate strongly to countryside recreation and sport. Furthermore, whilst these areas have excellent examples of documented case studies and demonstrate good practice to be transferred, they also share some of the problems of the countryside sector.

Sport and tourism in particular have well-established cultures of economic evaluation and demonstrate the benefits of effective co-ordination and assessment. These issues are of great interest to both CCPR and Sport England.

The Relationship to Sports and Sports Economics

A useful starting point is sport's impacts and strategy. This is because a substantial element relates directly to countryside recreational activities. It provides a guide to approaches that might be applied to the countryside recreation and sports sector. The UK Government's Sports Strategy *Game Plan* highlighted the need for investment in sport and recreation, noting sport's role in promoting health, education, crime reduction, and issues such as social inclusion. *Game Plan* suggested that active participation levels in sport should be raised from around 30% to 70% by 2020. Yet *Game Plan* made little reference to countryside sport and recreation.

The economic impacts are central to this review, and the importance of sport in this respect was noted, with estimated consumer spending in 2001 of £14 million and associated employment of 450,000 people (Sport England, 2001). Sport volunteering is also important, with an equivalent of 108,000 FTEs valued at £1.6 billion in 1996 (Nichols, 2003). A substantial part of this benefit relates to sports activities in the countryside, and the importance of volunteering applies across the broader remit of countryside recreation too. The importance of volunteers is recognised for sports generally, and in countryside recreation and sports in particular.

A key policy document for sports, and a useful model for a strategic context for countryside recreation and sports, is Sport England's *The Framework for Sport in England - Making England an active and successful sporting nation: A vision for 2020* (2004). *The Framework for Sport* signals a new way of working through partnership to deliver a shared vision for sport. This sets out a vision for sport in England - to be the most active and the most successful sporting nation in the world.

The Framework strategy presents sport as embracing much more than traditional team games and competition. In the context of *The Framework*, “*Sport means all forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental wellbeing, forming social relationships or obtaining results in competition at all levels*” (Council of Europe Sports Charter, 1993). The report considers the wider social and economic benefits of sport. It states that the economic benefits have been recognised and recorded since the early 1980s, but more recent evidence notes sport making an increased contribution to inward investment and the economic regeneration of the English regions. This is a useful parallel to the wider subject of countryside recreation and sports.

The Framework estimated that there were 5,821,400 sports volunteers in England each year. This was equivalent to 720,000 additional full time paid workers, with an estimated value of over £14 billion.

Countryside Recreation as a component of sport:

Countryside Recreation and Sport are components of countryside activities generally, and sport and recreation in particular. Each of these has a substantial research and professional base and associated literature. Both areas have significant and sometimes overlapping information bases and methodologies in terms of assessing and attributing their economic impacts. An example is the importance of sport in terms of consumer spending, and the research of Professor Chris Gratton (Sport Industry Research Centre, Sheffield Hallam University) writing on *Sport and Economic Regeneration*. (Gratton, 2004)

- Consumer spending on sport in the UK reached a record £15.2 billion in 2000
- This represents nearly 3% of total consumer spending
- In 1990, the comparative figure was £8.9 billion, so this market has increased by over 70% in the 1990s.
- Sport now accounts for a significant amount of consumer expenditure, GDP, and employment
- Major sports events can generate a significant economic impact on the local economy
- The sports industry can drive local and regional economic regeneration

An issue addressed in this report is the difficulty of fairly and effectively apportioning this to countryside recreation and sports. Other studies such as the Henley Centre report of on the horse industry in Great Britain have usefully addressed similar issues.

This review presents information from a wide range of sources across the Countryside Recreation and Outdoor Sports industries, demonstrating a great but unrecognised impact.

The economic activity related to sports is huge, with households in England spending nearly £11.5 billion on sport-related goods and activities in 2000. Consumer expenditure in sport in the UK was £15 billion in 2001 or 2.4% of total consumer spending. Employment in sports-related activities increased between 1998 and 2000 from around 1.5% of the national workforce to almost 2%, with 400,000 people employed in sport. Spending by commercial companies on sports sponsorship grew

throughout the 1990s to over £300 million pounds each year. Major sporting events are significant income generators to their host towns and cities. The Manchester 2002 Commonwealth Games for example, was a catalyst for the regeneration of East Manchester with 6,500 jobs, and £36 m of inward investment into Manchester. Again, a part of this impact is directly attributable to countryside sports, and the principles apply to countryside recreation broadly. The economic impacts of countryside recreation and sport in Cumbria for example, demonstrate the potential (National Trust, 2001).

Impacts can be direct and obvious or indirect. For example, company-based fitness and exercise initiatives have an impact on reduced absenteeism and overall employee health, and this translates into economic benefits. A large UK pharmaceutical company reported that those employees who participated in its fitness programme experienced 1.8 days less sickness absence than their sedentary colleagues. The company estimated the savings based on just fifty of those participating to be £44,500 per annum. In this context, the importance of rural landscapes for sport and recreational activities is very significant but unquantified.

Another marker for the specific evaluation of countryside recreation and sports was DTI figures from 2002 suggesting sport as the second fastest growing sector of the economy.

The Relationship to Tourism

Another key interaction is that between countryside recreation and sports, and tourism. According to the Countryside Agency (2001) in its report on Foot-and-Mouth Disease, tourism spending in the English countryside was worth around £12 billion in 2000 (with overall tourism spend at £53 billion). This included domestic tourism, day visits, and inbound tourism. This activity directly supported 380,000 jobs and 25,000 businesses.

The Countryside Agency (2001) report noted some characteristics of countryside tourism as:

- Visits to the countryside accounted for around 18% of total domestic tourism in England;
- Tourism trips to the countryside grew by 50% between 1993 and 2000, with a gradual move towards shorter and more frequent trips (1-3 nights);
- In 1998 24% of all leisure trips were to the countryside, with hikers and ramblers making up 15% of all tourists in England;
- The most important means of access to the countryside was the 189,000 km of public rights of way, supplemented by permissive and informal routes;
- By 2005 the *CRoW Act* will have opened up 4,000-7,000 square miles of open country and registered common land in England for people on foot;
- It was hoped when considering the Foot-and-Mouth crisis, that countryside recreation was '*income elastic*' with the sector or industry (as described in the report) recovering and continuing to grow.

In 1999, UK countryside day visits were responsible for £9.2 billion expenditure (77% of the countryside tourism total in England). Despite this obvious importance and significant economic impact of ***Countryside Recreational Activities*** in the UK, there remain serious omissions in policies, strategies, and available information. The present report addresses these. Measures of '*public benefits*' are used increasingly to

assess the merits of grant aid bids. In the absence of good information effectively interpreted these activities will be seriously disadvantaged.

Definitions and Data

There are serious difficulties in defining and identifying this broad range of activities and the key players. Studies by Gratton for LIRC (2004), by Cambridge Econometrics (2002; 2003), and by the Henley Centre (2004), touch on similar problems and their implications for data mining and for interpretation. The issues raised include the scope of the activities or 'sector' that is being considered, and the range of economic activities that can be fairly, reasonably, and credibly included. There are lessons here directly transferable to the present review.

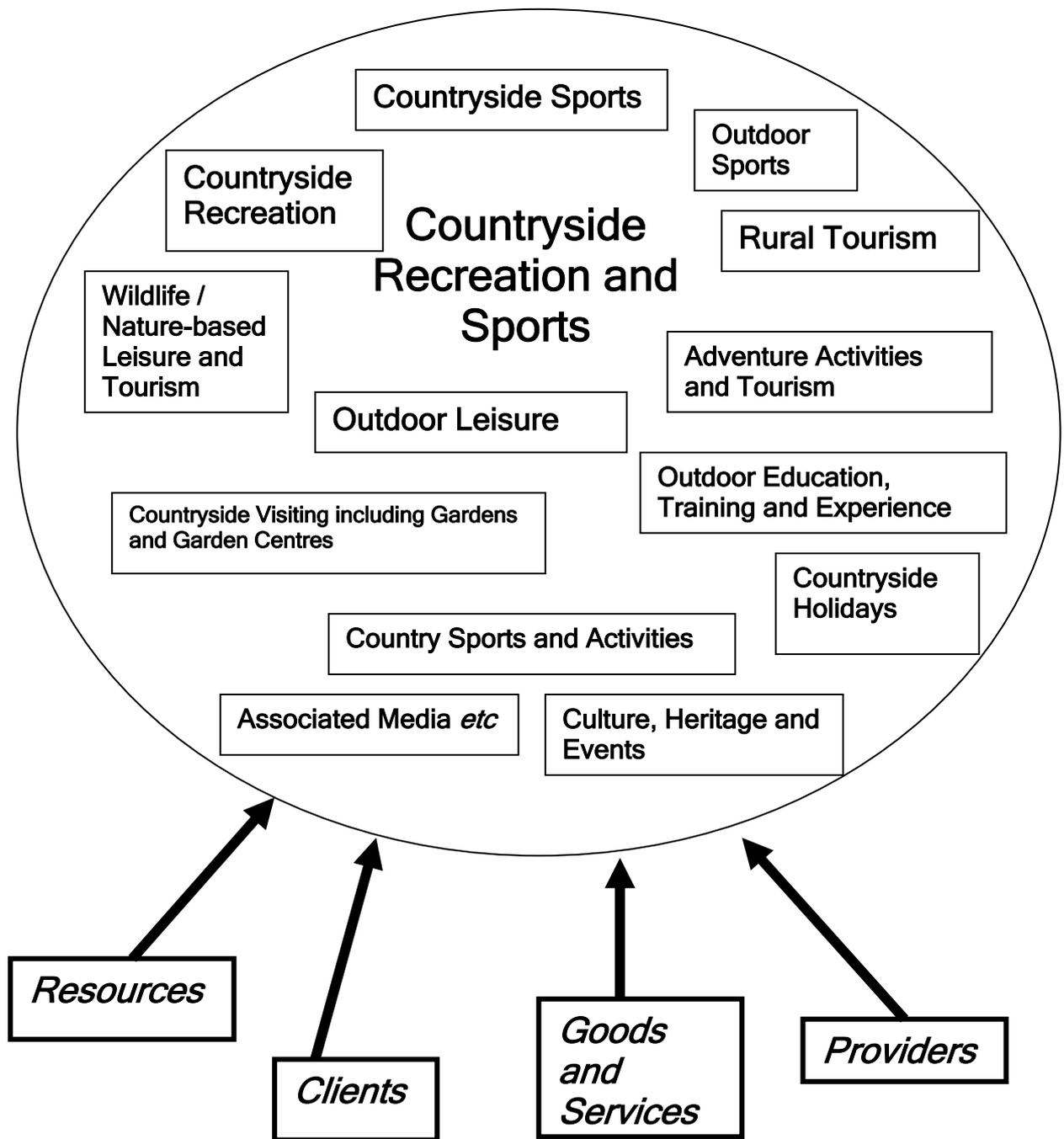
The Cambridge Econometrics reports for Sport England (2002; 2003) note the difficulty defining the boundaries of 'sport' in the original Sports Council study (Henley Centre, 1986), and accepted by most serious studies on the subject. They suggest the problem is not just 'what is sport?', but also 'which sports-related activities should be included?' (sports leisure wear, gambling on sport, games software with a sports theme *etc*). These issues are equally relevant to the present review but perhaps more difficult to unravel, since countryside recreation and sports are even more complex. If the boundaries of inclusion and definition are too wide then the study loses credibility with its audience. At the same time, if the boundaries are set too tight and rigid, then the consequent impacts are under-estimated. Perhaps even more important, legitimate players and stakeholders are excluded from the debate, to the long-term detriment of all.

This debate has carried through into whether a 'sports product' manufactured in a 'non-sports industry' should count in an assessment of 'sport' impacts. The assertion of Cambridge Econometrics (2002; 2003) is to follow the widely accepted 'product / industry' distinction adopted in economic statistics. A product can be defined as 'sports-related' even if the industries in the 'value-added, supply-chain' are not part of a conventionally-defined sports sector. This would include relevant clothing and footwear *etc.*, where the added value passes through the retailing and clothing manufacturing sectors. This approach seems both pertinent and pragmatic, and applies well to countryside recreation and sports. In which case the economic impacts related to sales of outdoor clothing, outdoor footwear, cameras, binoculars *etc* could be attributed legitimately to countryside recreation and sports.

The Henley Centre 2004 study on the British horse industry presents a useful synopsis of these issues and their implications. This is in addressing a particular component of countryside recreation and sports, but the findings have resonance for the whole sector.

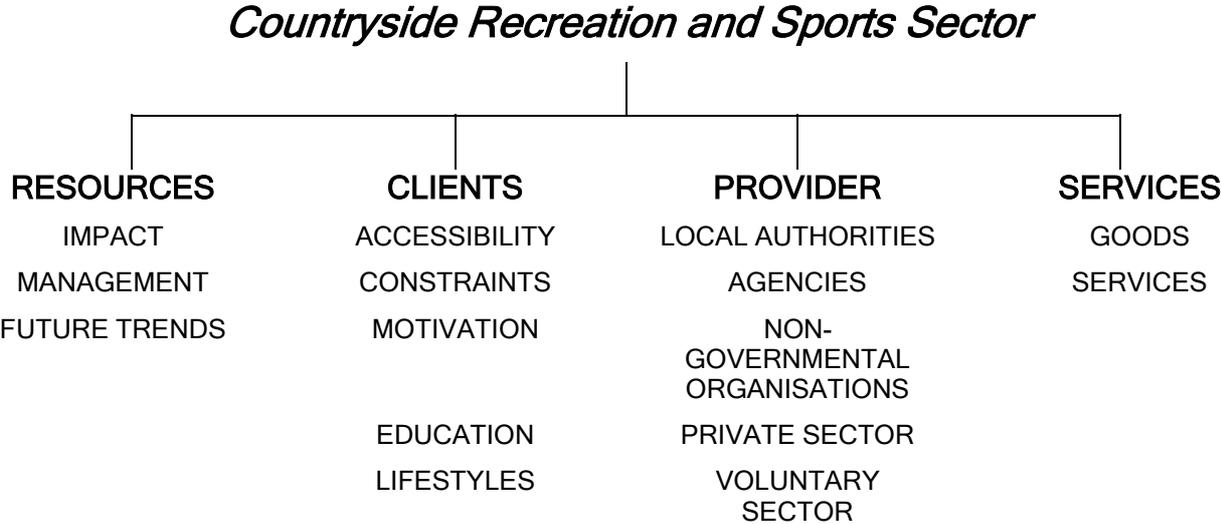
Figure 1 presents an overview of the breadth and scope of the countryside recreation and sports sector.

Figure 1. The Scope of the Countryside Recreation and Sports Sector
 (After Beard *et al.*, 2000)



The impacts of these activities depend on, and are delivered by a range of players or actors related to the *Resources* (physical and cultural), the *Clients*, the *Providers* (of the physical resource or of the experience or service), and the supporting *Goods and Services*. These relationships are presented in Figure 2.

Figure 2. The structure of Countryside Recreation and Sports



(Adapted from Beard *et al.*, 2000)

Mintel (2004) developed this research further. They showed that whilst outdoor sports may not enjoy the media profile of the UK's most popular spectator sports, but in participation and economic terms they comprise a significant sector of the overall sports market. In 2003, research for the Ramblers' Association showed that walking is the UK's most popular participation sport. A study for the Countryside Agency highlighted the economic potential of the outdoor sports market. It found that by itself, Britain's longest National Trail, the South West Coast Path, generated £300 million a year, supporting 7,500 jobs.

The Mintel research was used to build a demographic analysis of key consumer groups in this market and to assess how these consumers behave and what attitudes they hold towards outdoor sports. The report analysed the current state of the UK outdoor sports market, (including demand for clothing and holidays) and outlined prospective future developments influencing the shape of the industry in the short- and medium-terms. These included:

- Significant growth in participation levels in outdoor sports;
- An overview of the market's recovery from the Foot and Mouth outbreak;
- Increased interest in activity holidays both at home and abroad;
- Details of advertising and sponsorship trends within the sector;
- Analysis of the ages of participants with particular focus on the lucrative 'grey market';
- Key factors that act as motivators or deterrents for outdoor sports participants.

The sporting activities covered in the Mintel report include walking, scrambling, climbing, orienteering, abseiling, potholing, and mountaineering. The term '*the great outdoors*' refers to the broad landscape of the British countryside, and particularly to the grand scale rural areas. This is for example national parks and designated areas of outstanding natural beauty whose expansive vistas, peaceful nature, and separation from the urban environment are central to their attraction.

Countryside Recreation as a component of leisure and tourism is a vibrant sector and of huge importance to communities and to the economy.

A report by the Countryside Agency in 1999 indicated an average spend by night of occupancy per pitch to be around £65-£70. If multiplied up for Caravan Club sites alone, (around 90), this indicates an associated spend 'on holiday' of £54 million. This is before other purchases associated with the activity, such as the caravan itself and the equipment and other materials, magazines *etc* are taken into account. This is a huge potential impact on the economy at every level.

According to Christie and Matthews (2003) simply walking in the countryside is worth an estimated expenditure of £6.14 Billion per year, which generates up to £2.8 Billion in consequent income, supporting up to 246,000 jobs nationally. This is merely the financial impact without considering obvious health and other social benefits.

Countryside recreation initiatives such as the ***Eden Project*** have been incredibly successful, with 1,285,000 visitors in the summer of 2002, a turnover of £155 m, and total visitor spend in the region of £360 m for 2001-2. Wildlife leisure sites [such as nature reserves like ***RSPB Titchwell*** in Norfolk: 138,000 visitors and £1,800,000 to the local economy] are attracting increasing numbers of people.

Recent rural economic crises and particularly the impacts of Foot-and-Mouth disease have highlighted the importance of tourism in general and recreational activities and sports especially, in supporting the countryside. It is in the context of these issues and trends that this present report was commissioned.

Countryside Recreation and Sports Activities and Events

The diversity of countryside recreation and sport is enormous as indicated in Figures 1 and 2. The scope and extent of countryside recreation are considerable, and the economic impacts are significant. For example ***GO Outdoors 2004***, the 44th trade fair for outdoor activities and associated gear celebrated all that is great about the great outdoors with 145 companies (32 were new to the show) displaying a huge variety of brands, services and innovations. There were 1,964 visitors over three days at the Harrogate International Centre. The organisers point out that visitor numbers alone are not always a good measure of a trade show's worth. It is the type of visitor that is perhaps more relevant, and the percentage levels of the important categories of Director / Owner (51%) and Buyer (25%) at ***GO Outdoors 2004*** were significant and are indicators of economic activity and pertinent to this study.

Another key aspect of countryside recreation and sports is the impact on a local economy through events; which may be regular, occasional, and often annual or more frequent intervals. The economic impacts may be through accommodation and catering, or by the provision of other goods, experiences, or services. These events in the countryside have a history going back over a thousand years, with fairs, markets, and festivals. They have always been of huge economic importance to country areas,

and remain so to this day. In recent decades the range of events and their scale, have diversified immensely. Examples are:

Sports and related:

- Annual fell runs in the Peak District or the Yorkshire Dales;
- Orienteering events large and small, regular or occasional;
- The RAC Rally;
- Motorcycle rallies; Steam Rallies;

Others:

- Annual Bird-Watching Fair at Rutland Water;
- The Chatsworth Game Fair;
- Bakewell Show;
- The Great Yorkshire Show;
- Car Boot sales;
- Cultural festivals and other similar activities;
- Cycle races / rallies and events;
- Rare Plants Fairs;

Events may be a primary part of a countryside recreational activity such as an RAC Rally, or they may be an associated component of it, such as a trade show. Countryside recreation events include the Chatsworth Game Fair, the Bakewell Show, the Royal Highland Show, the Great Yorkshire Show *etc.*, and many other annual activities such as organised fell runs, large and small orienteering events, the RAC Rally *etc.*

They may be on-going or seasonal, or linked to specific events such as country fairs, game fairs, the annual Bird watching Fair at Rutland Water, regatta events for yachting, fishing events and competitions, and even motorcycle rallies as occur annually in the Humberhead Levels. Some events are huge and have a major impact on the local, generally rural economy. Not all of their impact can be attributed to countryside recreation and sport, and so placing an exact value on them is problematic. Formally organised sporting events such as the Open Golf Championship are excluded from this review.

This is a huge diversity and clearly, the impacts vary from event to event. However, the local economic impacts can be very significant, with local hotels, pubs and restaurants taking as much through a 2-3 day event, as they might over 3-4 months of normal trading. Pubs in the Peak District or in the Lakes, or the Yorkshire Dales, often rely on wintertime custom from walkers, climbers and fell runners to remain viable year-round.

Activities and events such as countryside motorcycle rallies can also have a big impact on a local economy, and they are major contributors to the national economic profile.

With leisure, tourism, and recreation increasingly important, urban and especially rural economies are dependent on their impacts. Stakeholders such as landowners, facility operators, participants, educators and trainers, and planners wish to understand more fully the economic forces and associated issues. Some of the

activities that together make up this broad sector are given below. This list is not definitive and activities are grouped into related areas:

- Camping and caravanning; demonstrations and training *etc.*;
- Countryside recreational events; Outdoor activities and adventure activities / training;
- Country sports and pastimes.
- Walking; cycling; equestrian / horse riding;
- Fell running, orienteering *etc.*;
- Climbing and mountaineering;
- Wind surfing and sailing;
- Swimming and diving; scuba diving;
- Hang-gliding; gliding; parachuting *etc.*;
- Boating - various pleasure boats - esp. narrow boats and waterways activities;
- Rowing;
- Sailing;
- Off-road driving (4x4 and motorcycles);
- Rallying;
- Wetland and water based traditional crafts and participation in - willow work / basketry / willow sculptures; reeds and thatching;
- Angling / Fishing - both coarse and fly;
- Sea-fishing from boat or on shore;
- Golf;
- Model aero, boats, railways *etc.*;
- Nature conservation and wildlife watching;
- Visiting water gardens and water gardening;
- Visiting museums and heritage centres;
- Visiting halls and country parks;
- Visiting historical sites and locations;
- Visiting themed events and activities;
- Locally distinctive foods and cuisine;
- Related leisure shopping - outdoor clothing, outdoor equipment, fishing equipment, garden supplies *etc.*;
- Visiting botanical gardens, zoos, wildlife collections and centres;

[This list is by no means exhaustive. There is a complex interaction between other aspects of land management generally, and with the broader issues of recreation, leisure and tourism provision].

This is a huge but rather amorphous 'sector' or perhaps broadly described 'industry'. Participants and events may be amateur or professional; often with a recreational audience. They include both informal and formally organised activities and events, and those located at or around some sort of centre, and others undertaken in a diffuse way throughout a landscape. Activities may occur on land or water, specifically or in part managed for their use; or on privately or publicly owned land managed for some other primary function.

Organisations and Participants - Some of the Key Players in Countryside Recreation and Sports

This is a complex area and some key organisations and participants do not identify with this wider sector. Figure 1 begins to set down the breadth and diversity. To establish this point further, it is worth briefly considering some of the co-ordinating bodies. For professionals and the organisations that help run activities in countryside recreation and sport, *CCPR* itself is a central body. An inspection of the relevant membership indicates the breadth, diversity, and activity of this sector. CCPR has a very wide membership of key organisations, and these fall into two Divisions:
- *Outdoor Pursuits* and *Water Recreation*.

Outdoor Pursuits Divisional Members

All Wheel Drive Club
Association of British Riding Schools
Association of Masters of Harriers and Beagles
Countryside Alliance
British Balloon and Airship Club
British Equestrian Trade Association
British Equestrian Vaulting
British Gliding Association
British Hang Gliding and Paragliding Association
British Horse Driving Trials Association
British Horse Reining Association
British Horse Society
British Microlight Aircraft Association
British Model Flying Association
British Motorcyclists' Federation
British Mountaineering Council
British Orienteering Federation
British Parachute Association
British Schools Exploring Society
Byways and Bridleway Trust
The Camping and Caravanning Club
Canoe-Camping Club
Countryside Alliance
Countrywide Holidays Association
Cyclists' Touring Club
Duke of Edinburgh's Award
Endurance GB
Forest School Camps
Long Distance Walkers' Association
National Caving Association
National Council of Metal Detecting
Open Spaces Society
Outward Bound Trust
Ramblers' Association
Royal Aero Club of The United Kingdom

Scottish Equestrian Association
The Pony Club
The Scout Association
Trail Riders Fellowship
Woodcraft Folk
Young Explorer's Trust
Youth Hostels Association of England and Wales

Water Recreation Divisional Members

Anglers Conservation Association
Amateur Rowing Association
British Association for Shooting and Conservation
British Canoe Union
British Dragon Boat Racing Association
British Long Distance Swimming Association
British Sub-Aqua Club
British Surfing Association
British Water Ski Federation
Channel Swimming and Piloting Federation
Inland Waterways Association
Model Yachting Association
National Association of Fisheries & Angling Consultatives
National Federation of Anglers
National Federation of Sea Anglers
National School Sailing Association
Royal Life-Saving Society UK
Royal Yachting Association
Sail Training Association
Salmon and Trout Association
Surf Life Saving Association of GB

Bodies such as the Adventure Activities Industry Advisory Committee (AAIAC) have important brokering roles to play. For government agencies that help manage and

provide facilities and support, and which help to determine and influence policy, the *Countryside Recreation Network* (CRN) is a key body. It has a membership of around twenty agency sponsors, and a readership for its journal (*Countryside Recreation News*) of around 3,000. Its members, mostly agencies are:

Association of National Park Authorities	Forestry Commission
British Waterways	Heritage Council, Republic of Ireland
CCPR	National Trust
Coillte - The Irish Forestry Board	National Waymarked Ways Advisory Committee (NWWAC)
Countryside Access and Activities Network	Northern Ireland Tourist Board
Countryside Agency	Ordnance Survey
Countryside Council for Wales	Scottish Natural Heritage (SNH)
Dept. of Culture, Media and Sports (DCMS)	Scottish Tourist Board
Dept. for Environment, Food and Rural Affairs (DEFRA)	Sports Council for Northern Ireland
English Nature	Sport England
Environment Agency	Sport Scotland
Environment and Heritage Service, Northern Ireland, DoENI	Wales Tourist Board
	Waterways Ireland
	Youth Hostels Association

The totality of the sector is very substantial and has yet to be fully identified or defined. Other key organisations include the commercial sector with outdoor gear and clothing manufacturers and retailers, represented in part by the *Outdoor Industries Association*, and the education and training sector with bodies such as the *Institute for Outdoor Learning*. There is a very significant body of education and training activities within the scope of this review. Many organising bodies are members of CCPR. Those such as the Forest Schools, Duke of Edinburgh Award Scheme, the Scouts, Venture Scouts and Guides, and many school and college activities and events, are very active.

Education and Training

Countryside recreation and sports have a huge impact through education and training. This is both as a component of wider education and training that use countryside and nature as a venue, and training specifically for outdoor activities. There are some key organisations such as the Field Studies council, the British Trust for Conservation Volunteers, the Institute for Outdoor Learning, The Scouting and Guiding movement, along with a vast number of schools, colleges, and universities. The Duke of Edinburgh's Award provides a good example of this sector and its potential impacts. The 2003 statistics for Duke of Edinburgh's Award Groups visiting the Wild Country Panel areas for Expeditions are provided below.

SUMMARY OF QUALIFYING VENTURES BY DIFFERENT MODES OF TRAVEL 2003

WILD COUNTRY PANEL	Foot			Cycle			Horse			Canoe			Rowing			Sailing		
	B	S	G	B	S	G	B	S	G	B	S	G	B	S	G	B	S	G
Total No. of Groups 2003	1186	1289	1425	0	15	18	0	0	0	5	36	49	0	0	0	2	1	0
Total No. of Groups 2002	1560	1718	2179	3	12	23	1	2	15	8	23	33	0	0	0	1	2	1
Total No. of Groups 2001	662	773	937	0	20	8	1	1	1	9	16	25	0	0	0	0	0	0
Total No. of Groups 2000	1253	1539	1747	4	15	9	0	6	5	2	18	21	0	0	0	1	3	0

The Duke of Edinburgh's Award project has 131,347 new participants each year; all undertaking Bronze 82,295 (at least four Expedition days, Silver 25,243 (at least six Expedition days) and Gold 15,986 (at least eight Expedition days). All these are in Groups or Teams of between four and seven young people (average 5.58) each with at least one adult Supervisor and one adult Assessor present to support them.

Interestingly, Richard White the Duke of Edinburgh's Award officer who provided the data, stated that: *'Whilst we have some research on the educational impact of our programme, we have not undertaken any work on the economic impact of what we do, and this would be very useful to us. The economic impact information would certainly be of benefit to us as well as to the wider outdoor community.'*

The more detailed statistics generally represent the older / more experienced end of the market (Gold Award for young people aged 16 - 25 years). At this level, young people undertake five-day trips to the more remote parts of the countryside (termed Wild Country) and there is a team of local Assessors to support them, enabling the gathering of the statistics. This gives a useful insight into the activities of one particular provider of outdoor activities, education, and experience. No economic assessment of these has been undertaken, but clearly, through accommodation, training, equipment, services, and supplies, these activities have a significant impact. This is just one of many providers in the field.

Bodies such as Countryside Alliance, the British Deer Society, and the British Association for Shooting and Conservation (BASC) represent traditional countryside sports and field sports. They have close links to the Country Land Owners' Association and to the National Farmers' Union. These bodies and their members are centrally placed within the spectrum of countryside recreation and sports. Alongside these, and rapidly growing in importance, is the nature and heritage conservation sector. This has a significant and increasing contribution to countryside recreation activities, obvious links to rural tourism, but no relevant umbrella body.

The memberships of sports, recreational, environmental and wildlife conservation organisations, and participation in activities are growing. Profiles of a number of key organisations are provided in the Appendix. However, a sample here indicates the diversity and the levels of activity. In Section 3 We also provide a summary table of information along with the economic profiles of the various bodies. This is an economically and socially active sector!

- The British Cycling Federation for example employs 127 people;
- The British Horse Society has 59,000 members, 31,500 volunteers, 36,000 riding clubs, and employs 84 staff;
- The British Mountaineering Council has 60,000 individual and club members and 320 volunteers;
- The British Orienteering Federation has around 9,000 members with 120 member clubs and 200 member schools;
- The British Sub-Aqua Club employs 21 staff and has 39,505 members;
- The British Trust for Conservation Volunteers has around 700 staff, 1,802 groups, 6,415 members, and 130,000 volunteers;
- The Duke of Edinburgh's Award with 118 employees has 138,965 members and almost 70,000 volunteers;
- The National Trust totals around 3.5 million members and employs hundreds of staff directly and through its landed estates *etc.*, and has around 40,000 volunteers;
- The Ramblers' Association employs 53 staff, has 143,000 members and up to 12,000 volunteers;
- The RSPB has over 1 million members (with 150,000 youth members), with 1,300 staff, 9,000 volunteers, 175 local groups and 110 youth groups.

There are complications that run beyond the scope of this study, such as that many organisations are international, and their total impacts reflect this. There is also an interaction between voluntary and professional activities, and increasingly leisure aspects of countryside environmental participation, and of sports volunteering for example, are important. The economic impacts are huge but often overlooked. The RSPB for example spends around £50 million per year and manages 182 prime nature reserves that are major countryside recreational facilities. The Royal Yachting Association has nearly 100,000 members and spends directly around £12 million per year, but the annual; spending impact of all these active members is far more than this.

The Values of Countryside Recreation and Sports

It is worth noting that organisations and individuals involved in these activities generally do so for pleasure. Their primary objective is not economic impact and benefit. Clearly, some individuals and organisations are employed through these activities and as such have a key interest in the economics. However, and especially from the view of the amateur enthusiast or participant, money is not the primary motive. An important point is economic and employment impacts are additional benefits. For society as a whole, they are 'added value'. Furthermore, the providers of the experience rarely receive government funding or subsidies. Their income depends on purchase by participants.

Some CCPR members such as the Ramblers' Association for example, have estimated the impacts of this spend by their members in the rural economy. It is important to recognise that there other ways of placing value on activities, and many social benefits associated with them. These are not considered in detail here, but non-market benefits and impacts, particularly in terms of health and well-being, with wider value to the Exchequer and the economy, are massive. The diagrams set out in Section 2 showing spheres of influence and activity (Figures 4, 5, and 6) are useful as visual guides to these interactions.

Increasing Sophistication and Increased Impacts

This review is concerned with economic impacts of countryside recreation and sports. The evidence confirms participation in these pursuits is increasingly sophisticated. Activities now involve specialist equipment, training, services, clothing, catering, guidebooks, magazines, and other media. All these lead to increased and increasing economic and social impacts. For example Mintel (2004) estimated that spending on sports clothing generally increased to £4,480 million in 2003 with a *per capita* spend of £72. Nearly half the total sports goods spending was on clothes. CCPR members such as the Ramblers' Association and the horse riders have undertaken detailed studies to assess their impacts. The Ramblers' Association *Walking makes money* (2004) indicated that sales of outdoor clothing and equipment rose from £25 million in 1980, to over £1 billion in 2000.

However, there are issues raised that affect future development. These include cost of insurance and indemnity in a culture of increasing litigation. Increased risk assessment and legal issues place a spiralling burden of both cost and time on organisations and administrators, many of which are voluntary. This is a serious problem for schools and other educational bodies, the life-blood of future participation.

Water-based sport and recreation are high spending countryside activities. The British Canoe Union for example has an individual membership of over 25,000, with 469 affiliated clubs and 145 approved centres. There are an estimated 2 million people taking to the water in a canoe each year, supervised and facilitated by one of the 13,000 BCU Qualified coaches or as part of an affiliated organisation (Mallabon and Taylor, *Paddlesport Review* (2002)). According to Mallabon and Taylor (2002) 26% of their members bought a boat (average price £500) in 2000, a total of £2,799,833 spent on boats by BCU members in one year. Furthermore, 66% of their members bought paddlesport related kit at the average total cost of £252 and projected total spend of *c.* £3.6 m for the year. This general picture is similar across all the main activities that make up countryside recreation and sports, and the economic impacts are significant.

Policy and Strategic Context

Since this broad range of activities and organisations overlaps other areas, the policy and strategic contexts are wide. Recent legislation such as the CRoW Act (2000) is central to issues of countryside access and recreation, but sports initiatives and policies are relevant too. Gratton (2004) presented the policy context for sports development in the UK:

- National Heritage Committee Report, 1995: 'Bids to Stage International Sports Events'
- National Cities of Sport Programme, 1995
- The Lottery Sports Fund 'World Class Events Programme', 1997
- Launch of UK Sport's Strategy for Major Sports Events, February 1999
- Culture, Media, and Sport Committee Reports, 1999 and 2001

These led to current initiatives such as the Government's Sports Strategy *Game Plan* supported by a raft of detailed appraisals for the various sports bodies looking at development, participation, and economics. Some are relevant to this review but it is difficult to present a simple overview for countryside recreation and sport.

The subject is huge and overlaps with major policies on land management, on rural renaissance, on extensification, on heritage and nature conservation, and on health. Since Foot-and-Mouth disease and BSE caused serious problems for the rural economy in the UK, Government has sought with a degree of urgency to develop a rural agenda. This review presents an evidence-based rationale for the importance of countryside recreation and sports within the emerging agenda. It is vital that this sector of activities is better recognised. The support needed to ensure continuation and maximisation of the benefits, can then be established. The government's merger of key countryside agencies into Natural England is important to this, yet the policy and strategic implications are unclear.

A New Focus on Rural Issues

Following crises in rural areas and a long-term farming economic decline there has been attention in the media, from agencies, and from politicians on issues of countryside economics. From this has emerged an interest in non-farming activities of economic importance to rural areas. A huge output of technical and research reports on activities and organisations resulted. Some of the figures produced are very significant and have radically changed perceptions of the rural economy.

Reports such as the Countryside Agency (2001) (*Foot and Mouth disease; the state of the countryside report*) and the resulting media interest helped fuel a change in perception. This change was important to countryside recreational and sporting activities, with an increased desire to recognise and quantify these contributions. The Countryside Agency (2001) presented key issues and an evidence-based support for them and the assertions made. It estimated that between 20,000 and 30,000 jobs could be lost in rural areas through a decline in tourism following the outbreak. Directly related to countryside recreation, the YHA laid off 200 seasonal workers. There were countless examples of village pubs and shops closing, often never to re-open. In Cumbria alone there were 430 early job losses (180 full-time and 250 part-time), followed by 3,000 seasonal jobs. Particularly relevant to this review, the Countryside Agency report stressed the impacts via 'rural pursuits' including hiking, rambling, field study, and cycling. It noted that walking, climbing and mountaineering activities were severely curtailed with associated losses of £40 million by retailers and suppliers of outdoor clothing and equipment.

Riding and associated activities were affected badly with £29 million per week lost income and additional costs of cancelled equestrian events. Similarly shooting and game farming were affected with potential major cost implications for game farmers and shooting estates. In the early 1990s, income from shooting in England was estimated to be worth around £22-£26 million, employing 2,600 gamekeepers and 2,800 FTEs for beaters *etc.* Commercial activities associated with angling lost an estimated £3 million per week. If horseracing and bookmaking are included in this assessment, then the impacts are even more stark. Each major event (such as the Cheltenham Festival) was estimated to be worth £10-£20 million.

Other losses noted included leisure boating due to closure of waterways, the cancellation of agricultural shows with consequent direct impacts on local economies and lost suppliers' trade *etc.* Many other community and arts festivals and events were cancelled with consequent impacts often not calculated. Many countryside visitor attractions (over 1,000 reported) closed at least temporarily and there was a consequent impact in terms of visitor expenditure and revenue generation. There was evidence of a displacement of visitors from vulnerable rural economies to more robust urban areas.

The major, adverse effect on the tourism industry and through this on local, particularly rural economies was obvious. A significant part of this impact was directly attributable to loss of countryside recreational activities and opportunities. The overall losses from overseas tourism alone were estimated at £1-2.3 billion for 2001. The Countryside Agency report noted the significant decrease in rural tourism and day visits to the countryside due to the outbreak, with overall domestic tourism losses running at £2-3 billion in 2001. Accommodation providers suffered badly through the loss of countryside recreational visits - for example in Cumbria they were down 60-70% by the end of March with a loss of £38 million. Significantly, the impact felt was greatest by independent establishments in rural areas.

The Importance and Impacts

Purchase and Participation

Countryside recreation and sports are increasingly sophisticated and involve spending on clothing, equipment, and the experience. There are increasing numbers of members, participants, and professionals. The importance and impacts of countryside recreational activities are sometimes 'disguised'. For example, you do not have to be physically 'in' the countryside in order to partake. Outdoor sports or nature- / wildlife-based television are high in the popularity ratings. Countryside sports and wildlife-based documentaries are regularly in the top viewing tables. The BBC's *Animal Zone* for example had UK viewing figures of 2.5-3.5 million, with 65-70,000 visiting the associated web site on a weekly basis (Munford, 2000). Equestrian events and motor sports for example, are also hugely popular in the media. Programme presenters become celebrities and the spin-off books, videos *etc.* are bestsellers. Countryside garden visiting and gardening are similarly popular. In-house and theme magazines have massive circulations - the RSPB *Birds* magazine for instance runs to over one million copies, and the National Trust publication even more. Angling, gardening, caravanning, and camping publications are similarly popular. All these generate sales and advertising revenue, and employ a huge number of people in their research, writing, publishing, and retailing. All these benefits are directly attributable to countryside recreation activities. This is big business that depends almost totally on the voluntary organisations and volunteers that support it.

Recreational visitors (tourists and day visitors) have big impacts on local and regional economies. Considered as part of regional tourism they are important. Yet due to processes of data gathering, they are often unquantified and overlooked. They include visitors to country parks and nature reserves, and may be special interest enthusiasts or casual visitors. In Lincolnshire for example, *Gibraltar Point National Nature Reserve*, is the County's second most important visitor attraction after Lincoln Cathedral. It attracts around 160-200,000 visitors per year (*Gibraltar Point National Nature Reserve Management Report*, 1999), and draws down substantial grant aid. This generates full-time, permanent employment, seasonal and part-time jobs, and contract work, contributions to the local economy that have been neither quantified nor appreciated. This omission applies to most informal countryside recreation provision.

An example is the extensive coastline of the UK, a hugely important resource for countryside recreational and sporting activities. This use often masked by mass tourism, is increasingly an important component of the tourism industry. Small ships and boats (such as the *Yorkshire Belle* at Bridlington in Yorkshire) run thriving businesses carrying wildlife, fishing, and countryside recreational enthusiasts to view

scenery and wildlife, and to fish. This activity provides an important service to tourists, and revenue to operatives, maintenance contractors, service suppliers *etc.* It attracts visitors to the area, supports hotels and pubs, and provides revenue to suppliers of outdoor clothing, guidebooks, maps, cameras and films, binoculars and telescopes, memorabilia, and other merchandise.

Particular reports and datasets can suggest a level of activity and hence an assumed impact. For example, the number of adult days spent on walking as a pastime in the UK was 1,912 m in 1994, rising to 2,147 m in 2002 and forecast to increase to 2,171 m in 2004 (*Leisure Forecasts 2000-2004*). This says nothing about economic impacts except that they must be considerable. Further studies (see later reviews) then develop the theme and in some cases present robust information on social and economic impacts. The use of bicycles in the countryside is a typical example of such interest. In this case it is due to both the high participant and potential participant levels, and the relatively high consumer spend on the primary equipment and on supplementary purchases. It also demonstrates potential difficulties. According to the commercial research body *Mintel*, estimating sales and hence use of bicycles is fraught with problems. However, the total adult market in 2000 was 1,685,000 cycles with mountain bikes and similar accounting for half the market. Clearly, these machines are suitable for use along green lanes and countryside areas. Many of them are bought for children and family cycling days and holidays. These often involve boating and wildlife activities too. According to *Mintel* one third of all households in the UK own at least one mountain bike, so this is an important and growing area.

Actually placing these impacts within the local economy may be problematic. The primary economic impact of the equipment purchase (manufacture and sale) may occur anywhere but probably in urban areas. Often only the secondary impacts of activity participation are rural. The latter may occur throughout a broad geographic area from town to country, and may vary from local use from home, or following a drive or holiday in a rural area. Furthermore, the impacts may be associated with casual use, or through organised events, and there may be an impact through participants, organisers, and spectators. Some use is by professionals but most is by amateurs. This diffuse relationship with countryside recreation is typical of many activities.

Provision of Facilities and Locations

Countryside recreation may take place at a specific location and with a facility developed to provide the experience and the necessary infrastructure and support. This is not always the case and as already noted many activities are informal and uncounted. However, countryside activity centres may be very modest, or substantial and sophisticated. Such developments contribute to local and regional economies in proportion to the level of investment. The economic impact may be directly via the facility provided and used, or through participation dispersed beyond and into an area or region.

It is useful to consider briefly the potential impacts directly attributable to facility provision. An example relevant to countryside recreation and sports is the Carsington Water reservoir facility opened in the 1990s by Severn Trent Water plc. They developed a new reservoir facility at Carsington Water in Derbyshire, just south of the Peak National Park. This integrated provision includes major countryside recreation, wildlife conservation, and nature-based leisure facilities. The centre has an active water sports provision, family cycle-ways, campsites and caravan areas, plus retail and catering. Since it opened, it has each year attracted over one million visitors and

exceeded its targets from day one. A recent study by Sheffield Hallam University (Crowe *et al.*, 2002) for Severn Trent Water showed the impacts of Carsington Water:

- Countryside Recreation and Nature conservation benefit of huge regional importance with footpaths and cycleways, boating facilities, provision of opportunities for close contact with nature, viewing opportunities (hides *etc.*) for bird watching, good interpretation, excellent access for diversity of users;
- Local people regarded the social and economic impacts as positive and identified significant increased trade and enhanced amenity value;
- Thirty-one full-time and forty-two seasonal / part-time jobs created at the site; up to 436 jobs (FTEs) created in the local, rural economy as a result of an estimated annual visitor spend of over £14,125,000;
- Over one million visitors now use the site each year.

Experience suggests that potential economic impacts through the provision of a typical countryside recreation facility vary from a modest visitor centre to a major activities centre or nature reserve. Economic impact may be through start-up capital investment and through running costs or revenue:

- For initial start up (capital investment and grant aid draw down) of a facility such as a major activities and visitor centre, short-term economic inputs may be relatively modest (£1,000-£10,000) to very major (£100,000-£1,000,000).
- The economic impacts are from immediate and short-term (research, design, construction and establishment), to long-term leisure and tourism benefits. Short-term employment for construction of a major new facility might be around 5-100 jobs over a 2-3 year period.
- Running costs and income (revenue costs and generation, grant aid, commercial function and induced local impacts) can generate anything from perhaps 10-100 direct jobs and a substantial induced impact.

Direct and induced impacts:

- With visitor figures from 100,000 to 600,000 day visits per year for a facility such as a country park, activities centre, or a major nature reserve, and associated site-based staff, a project easily contributes from £1 m to £6 m per year to the local economy through visitor spend.

Tourism Economic Activity and the Rural Environment

Estimating Economic Impacts

There are several ways of measuring or estimating the impacts of an activity of the economy and these may be at levels from national, to regional, to local. The impacts may be direct, or induced by the employment or spending that derives from the direct impact. The economic contributions may be precise measurements or deduced and implied effects.

What is economic impact?

- Measurement of the additional expenditure of visiting spectators, competitors, officials, and media within the city staging the event;
- Conversion of this additional expenditure into additional local income and jobs generated as a result of the event using multiplier analysis;

Economics and Finance

The Difference between Economic and Financial Costs and Benefits

In assessing the economic impacts of countryside recreation and sport, it is important to recognise the subtle differences between economics and finance. Economists talk about market and non-market costs. Market costs are the ones where goods and services are exchanged in return for a financial transaction. These are the real monetary costs.

However, from the wider social viewpoint, there may be costs and benefits that do not enter the market; or for which the market only accounts in part. For example, many sporting activities make wide use of volunteers. These represent a real monetary benefit and also provide a service i.e. a social benefit. Recent reports on volunteering for the Sports Council and for CCPR (LIRC, 2003) analysed a range of datasets and attempted to value the contribution of volunteers in sport. (It is important to recognise that the definition of volunteering may differ significantly between studies. Sport England research considers all volunteering whereas that for CCPR only looks at formal volunteering. The conclusions reached may therefore differ). Economists try to identify and apply financial values to these non-market costs and benefits, and one of the best-known techniques is 'Cost Benefit analysis'. This attempts to value all the costs and benefits. In practice, it is difficult to calculate the so-called 'shadow prices', and there is a large element of subjectivity. For example, it is clear that participation in countryside recreation and sports generates health benefits and that these must save the Exchequer a huge amount on health-related expenditure. However, it is very difficult to calculate what the value of this saving might be, and we found no published accounts or relevant datasets to interrogate.

The Informal Economy and Voluntary Participation

The value of the informal economy in any sector is very hard to estimate. Only with an extensive programme of ethnographic research can a clear picture emerge. This has been done for some sports activities and Henley (2004) made some pertinent observations with up to 50% of livery businesses as informal economy. This was unlicensed, operated by farmers and other landowners, in a small-scale, *ad-hoc* manner.

The voluntary labour is unpaid work where the volunteer does not receive any form of employee compensation. The latter is defined as the total remuneration payable by enterprises in cash or in kind. This compensation mostly comprises wages, salaries, and payment in kind, recorded as an entitlement for of work done. This relates to an accounting period (paid in advance, simultaneously, or in arrears). It does not include unpaid work. In this case, unpaid work (i.e. purely voluntary work) may be overlooked in the process of estimating the size of an activity. This is a potential problem, and particularly so for an industry like countryside recreation and sport in which volunteer participation is massive. The problem for assessment is that the services are productive, but there is no associated cost of production. Not classed as intermediate consumption or as compensation to employees they are easily overlooked. With no cost of production associated with the services, volunteer impacts are not reflected in the price charged for goods and services. Therefore, they are not reflected in the total expenditure on the goods and services of that industry.

Henley (2004) for example estimated the very significant amount of voluntary activity within the horse industry, The British Horse Society having 31,500 volunteers working for them.

Economic Impacts of Countryside Recreation

There has been a considerable body of research on relationships between tourism activity, the quality of the countryside, and the provision of suitable facilities within it. The principles from this apply equally to countryside recreation and sporting activities. For example, the National Trust found that 40% of tourism-based employment was dependent on a high quality environment. In a rural context, this dependency rises to between 60% and 70% (The National Trust, 2001). For the RSPB, Rayment and Dickie (2001) provided a comprehensive review of case studies on economic benefits of nature conservation and associated countryside recreation activities. This research highlighted the actual and potential contributions of assets such as country parks, nature reserves, and open access countryside, to the economy and to employment. It also demonstrates the crucial dependence of much countryside recreation on conservation land management and of the economic impacts of conservation on recreational spending. The two are intimately interlinked.

Examples of nature reserve visiting and economic impacts from Rayment and Dickie, (2001) are:

- Bempton Cliffs RSPB Nature Reserve, East Yorkshire: 44,093 visitors; £407,000 value to the local economy per year;
- Blacktoft Sands RSPB Nature Reserve, East Yorkshire: 23,706 visitors; £93,000;
- Leighton Moss RSPB Nature Reserve in Lancashire: 93,531 visitors; £950,000;
- Fairburn Ings reserve in West Yorkshire: 56,202 visitors; £373,000;
- Radipole Lake in Dorset: 35,097 visitors; £423,000;
- Minsmere (Suffolk): 68,247 visitors; £1,100,000;
- Titchwell (Norfolk): 137,700 visitors; £1,800,000.

The National Trust (2001a) showed that in Wales £6 bn GDP was directly dependent on the environment. In Cumbria, (National Trust, 2001b) 2,700-4,600 full time equivalent jobs (FTEs) were supported by the work of the National Trust. This was around 15% of the jobs in Cumbria's visitor economy. The Trust spent £3.5 m on direct staff costs and £3.4 m on goods and services in Cumbria, the latter supported around thirty jobs (FTEs). These impacts depend on the diversity of countryside recreational activities happening across the region. Critical to generating the economic impacts is the provision of 'opportunities to spend', and turning visitors or participants into local economic activity. Interest in this aspect has increased dramatically as the rural economy based on agriculture has suffered in recent years.

Key issues include the important relationships between these 'new' economies and those more traditionally associated with land management and rural areas. There are major challenges for decision-makers in determining how to support and grow the new economies. How can they be accommodated by the older economies, grown sustainably, and their benefits maximised? To address these issues requires reliable data. It also needs a thorough understanding of the issues, the methods applied, and the context of the activities and their impacts. This study provides a platform for countryside recreation and sport.

The Nature, Scale, and Impacts of Countryside Recreation and Sport

Countryside Visiting

Leisure, recreation, and tourism are key drivers in the economy, their scale, and economic significance known for many years. Preston (1984) for example, estimated that each year over 500,000 people visited Dovedale in the Peak District. As far back as 1973 *The Sunday Times* (Geraghty, 1973) noted 10,000 visitors per day to Kynance Cove in Cornwall, 515,000 people between March and November to Tarn Hows in the English Lake District, and 250,000 per year to the summit of Snowdon in Wales. Mintel (1998) showed that the UK *Leisure Industry* was the Country's largest economic sector. National media reflected this for example *The Financial Times* (1998) noted that walking was the most popular physical activity for males (49%), and average household expenditure on leisure goods was *c.* £45 per week during 1995-6. The average adult spent *c.* 1 hour per day on 'out of home leisure', excluding socialising. Relevant to countryside recreation, a Country Park in Strathclyde had 5.5 million visitors per year.

Day Visits and Sight-seeing

The trends in countryside recreation activity are well established and long-standing. Figures from the Central Office of Information (1976) show that in Great Britain there were 400 forest trails, 350 picnic sites, seventeen camp sites, six scenic forest drives and twenty-two information centres. These were alongside 111 local authority country parks, and 141 picnic sites in England and Wales. Water-based recreation included 1,600 sailing clubs and 3 million anglers, with sites provided at over forty country parks. According to the tourism data sources of the time (BTA / ETB Research Services report on sightseeing in the UK in 1997 (1998)) of 6,074 attractions where visitors are counted or estimated, there were 1,508 museums, 469 visitor centres, 377 gardens, 305 wildlife attractions, 269 country parks, 250 farms, twenty lakes and reservoirs and sixty-two pleasure boat operations. Many of these had a wildlife or nature element, and most are more-or-less closely linked to countryside recreation and outdoor activities. There were also 1,481 historical properties, many also with outdoor leisure associations such as historic gardens, adventure activities, and campsites.

This helps establish the scale and diversity of the sector. It also demonstrates how it has been recognised and growing over several decades. If data exist from the past and show increases, it is assumed that participation, expenditure, and economic impact have grown over the period. Many special interest areas such as climbing and outdoor clothing have grown into sophisticated businesses with significant retail, provision, marketing and manufacturing elements.

Associated Activities

The 'out of home' outdoor experience of countryside recreation and sports extends through walking, running, climbing, caravanning and camping, to fishing, to boating and water sports, to 'off-roading', and through to adventure activities. (A recent study (Newidiem, 2004) showed *adventure tourism* to be worth £140 million per annum to the North West Wales economy, with £60 million of which in the Snowdonia National Park. This creates (directly and indirectly) over 8,400 jobs (FTEs) across the area, almost 6% of all employment across North West Wales). It is relevant that for industries such as forestry, the Forestry Commission now emphasizes that its economic importance is primarily as a provider of countryside recreational and tourism opportunities. For example, the economic impact of the RAC in North Wales

exceeds many-fold that of the forests themselves in which the event operates (Blakey *et al.*, 2002).

Nature and Heritage Conservation

An important component of countryside recreation is nature conservation and the related activities of heritage conservation. These merge seamlessly with garden tourism and heritage garden conservation. Some of the work of the National Trust and the RSPB for example are now embedded in the matrix of the local economy; mostly rural but sometimes urban. In rural situations, they can be hugely important. A landmark publication was Rayment (1995) highlighting in a broad literature review, the relevance of nature conservation to local economy. He described both direct and indirect effects and these apply to other countryside recreation and sporting activities:

a. Direct

- *Employment, wages, and salaries of nature reserve staff;*
- *Purchases of local goods and services;*
- *Supply of goods and services to local community;*

b. Indirect

- *Expenditure by visitors;*
- *Multiplier effects associated with staff, visitors and expenditure;*
- *Employment and income from processing and marketing of output from nature reserve, (such as timber, agricultural produce and other materials);*

Again transferring the approach applied in nature conservation, there are important findings for countryside recreation. Brooke and Rayment (1999) noted £384 million spent in local economies in England related to nature conservation activities, and £344 million in Wales. They quoted figures from CEAS (1993) that show support for 53,500 jobs, with a ratio of six jobs created for every one job directly employed in nature conservation itself. In 1991/2 there was between £350-£450 million of tourism expenditure on nature and landscape conservation in England and Wales.

Overall figures for tourism can also be informative, though they often miss out local day visits and generally do not provide data for countryside recreation specifically. The most reliable estimates are those inferred from a number of different studies and sources. For example, Geoff Broom Associates (1997) suggested that tourism in the English Countryside was worth *c.* £8 billion per year. Crabtree *et al.* (1992) noted 149 Scottish wildlife sites to which they attributed £30 million of visitor spending, supporting 1,200 jobs along with 300 directly employed; based on a mix of wildlife viewing and associated traditional countryside sports.

Traditional Countryside Sports such as Angling and Wildfowling

The Environment Agency (Hilton, 2004) and Countryside Agency accept that available datasets on recreational fishing and its economic impacts are limited. However, there are some pertinent sets of information, and these give context to the scoping study. In Scotland during 2000, UK residents taking fishing holidays (where fishing was the main reason for the trip) spent £52 m with 100,000 tourism trips and 700,000 'bed nights'. A further 800,000 fishing holiday trips were taken with fishing only part of the reason for the holiday. The associated expenditure was £184 m (= 8% of the total holiday expenditure in Scotland in 2000). Average expenditure per holiday

trip was £920. Most visits were in the period July- September and the average stay was seven nights if fishing was the main purpose and five nights if it was part of the objective of the trip. This is interesting as both are longer than the average holiday break of four nights. There are also datasets on the demographic make-up of visitors and again, interrogation of these can be informative. Angling has a wide participant base and major economic impacts. Helping to close the gap in information availability, the Environment Agency in 2004 published *Our nation's fisheries* by Anna Hilton. The report suggests that the 3.9 m active anglers (from datasets such as the Environment Agency's rod licences *etc*) make it the most popular participation sport in England and Wales, with an economic value of around £3 billion based on extrapolations from sample datasets of purchasing and costs associated with the hobby.

The direct impacts of wetland leisure and tourism have been calculated and used to inform policy interventions. This was to help justify support to wetland restoration projects such as *Wet Fens for the Future* (2001). It noted the potential interest in game shooting and field sports, but suggested profits may be low. However, in a small rural economy, even a modest increase in financial activity may help maintain and make viable important services such as shops. The impact of countryside recreation and sport can therefore be critical. Membership of affiliated wildfowling clubs increased by 254% between 1980 and 1990 and the sport remains popular. The same report also assessed the impact of fishing. With around 3.9 m anglers in the UK, successful enterprises rely on good marketing. Charges for fishing rights to a club vary from £2,900-£7,400 per hectare for an average stretch of water. The cost of day rods depend on the type and quality of the fishing; with coarse fishing @ £2.50-£5.50 per rod per day and game fishing @ £12-£20 per rod per day (2-6 fish take). A high level of management input is necessary to maintain fish stock quality and to combat poaching and other problems.

Direct Economic Impacts of Angling

The Sports Council (1991) (*Angling - an Independent Review*) gave the annual spend on their hobby by UK anglers as £1.2 billion = £1,200,000,000 excluding VAT. This research was by Bruno Broughton, based on 1989 socio-economic research using a base of about 1,200 anglers selected to give a broad representation of participants. Data given by Broughton prepared by two members of 'the trade' independently suggest that based on retail prices, the tackle trade is worth about £325 million, the bait trade a further £35 million, and magazines and books about £20 million per year.

The 1994 research commissioned by the NRA (*National Angling Survey 1994 - Fisheries Technical Report No.5*) concluded that there were 2.9 million freshwater and sea anglers in England & Wales. (If data from Scotland & Northern Ireland are added, the UK figure rises to about 3.5 million).

In the same study, NOP estimated that coarse and game anglers in England and Wales spent £3.3 billion per annum on their hobby. Clearly, the figure would have been higher had it included Scotland and Northern Ireland, and sea anglers. Broughton (considered by the agencies and by the industry to be a key authority) estimates that this was too high with a figure in 2000 of around £2-3 billion. (In its '*Charter for Angling*', the Labour Party estimated that the 'spend' on angling was £5 billion although the source is unknown and whether it related to the whole of the UK was unclear).

Employment Related to Angling in the UK

According to Broughton (2002), there are no reliable data and there is no recent research into the number of jobs and job equivalents provided by angling. His

calculations suggest that direct employment by manufacturers, retailers, bait companies & independents is probably 5,000-6,000. To this he adds employment in the angling media, the EA and other equivalent organisations, fish suppliers, and other management personnel, and fishery owners, managers and agents. This estimate of employment raises the grand total for the UK to around 12,000-15,000. With job equivalents, he gives a revised figure of 20,000 and perhaps up to 26,000.

Assessing The Importance of Countryside Recreation

A case study of Visitors to North and West Norfolk

The relative economic contributions of the various aspects of countryside recreation in a landscape setting are difficult to ascertain. It is perhaps this, even more than other factors, that has encouraged both researchers and practitioners to neglect this important area of activity. Rayment *et al.* (2000) in a study for the RSPB addressed an issue of core interest in assessing the economic impact of countryside recreation apportioned to the different components of a tourism experience. This demonstrated that North and West Norfolk received 35.6 m day visits and 6.5 m overnight stops per year with a visitor spend of £507 m per year supporting 14,018 actual jobs or 9,997 FTEs. The survey sites researched in detail had 200,000 visits per year with 1 m overnight stops and £21m spend per year, 620 jobs, or 442 FTEs. They evaluated the spending and jobs in the local economy derived from visitors to six survey sites. They were attracted primarily by: *Birds; Scenery and landscape; Beaches; and Peace and tranquillity.*

The Norfolk Broads Boat Hire Industry Study (2001)

Another study that considered the wider economics of a particular countryside recreational activity was the *Broads Boat Hire Industry Study* (2001). The Norfolk Broads boat hire industry is worth around £146 m, playing a valuable role in the regional tourism industry. In the year 2000 sixty-five different operators, offered cruisers and sailing boats for weekly hire in the Broads region. The catering sector in the Broads is currently worth around £45 m per year. The Broads offer peace and quiet in beautiful scenery - exactly the requirements of many for a happy holiday, and the study highlighted the opportunities to work in partnership with nature conservation. The study found the same tourism trends as reported by the Tourist Boards, with increased short breaks and 'empty nesters'. They also noted the increase in special interest holidays: heritage, wildlife, and other recreation. Strengthening the links to a diversity of countryside recreational and sporting activities may help to offset other pressures on domestic tourism through competition from holidays abroad.

Interestingly UK consumer spending on boating was £560 m in 1994, rising to £1,271 m in 2002, and £1,423 m by 2004 (*Leisure Forecasts 2000-2004*). There are important issues here that relate to policy and support if the boating sector is to be maintained or grow. In particular, there is a need for better linkages between different stakeholders and targeted support for areas of potential growth.

Section 2 Project Methodology and Approach

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The Project Requirements and Methodology

This study did not include any funded primary research, although a small sampling study of relevant organisations was undertaken as supplementary work by Sheffield Hallam University. The commissioned work therefore only included the collation and assessment of existing evidence. The focus was on economic impacts and benefits of countryside sport and recreation, participation in countryside sport and recreation; and relevant case studies.

The Research Approach

The research methods used are noted below.

1. Desk research

The bulk of the work was an extensive desk search and literature review. This included the identification of sub-sectors within the countryside recreation and sport industry, key strategic economic issues, and collation of reports, studies, and data from across this industry and other areas that are relevant. This included work on methodologies and transferable approaches. Key sources are listed and abstracts of major reports are presented.

2. Expert interviews and liaison

The study was informed by useful contributions from key industry specialists. It had been hoped to develop this approach as a significant part of the study. For reasons beyond the control of the research team, this was not possible. More active stakeholder involvement to capture divergent views on the industry, to tap into specialist knowledge, to identify existing work and information sources, and gain an insight into key issues, is recommended for the next stage.

This should involve the broadest scope possible under the definitions that we provide.

3. Survey of key organisations

A very limited primary study of key organisations was undertaken for Sheffield Hallam University to gather some exemplar stakeholder data on the industry. This provides a useful guide to potential impacts.

4. Countryside recreation and sport industry research workshop

Within the scope of this study, it was not possible to undertake a stakeholder workshop. However, it is recommended that one or more should be hosted in the next phase of research. We have tested the approach for the nature conservation sector, and Henley (2004) undertook a very useful exercise for the horse industry. The findings are directly transferable to the wider industry.

Methodology

The study involved an extensive critical review of previous work, literature, and relevant information sources and datasets.

1. Relevant projects, initiatives, policies and strategies were identified, reviewed and presented;
2. Key issues, factors and players / stakeholders were noted;
3. A questionnaire survey of key organisations was undertaken;
4. An evidence base for the socio-economic impacts with supporting case studies was developed.

The review assessed over six hundred potential sources of information on economic impacts of countryside recreation and sport. These included published and unpublished reports and papers, and information on the internet. From the initial search, around 2-300 key reports and sources were identified and nearly one hundred abstracted in detail. These are in the Technical Appendix as the major evidence base for this study.

Methodology: Some Key Issues

Information and Economic Modelling Methods

The availability and reliability of information sources are fundamental issues for this review. Many reports or web sites present secondary data gathered by researchers elsewhere. Some apply sophisticated techniques and models critically others do not. In some cases simple statements of input / output (i.e. money spent or members joined) are presented; and in others assumed economic impacts 'induced' by this spend are calculated and presented. This calculation is occasionally based on primary research to generate the multipliers; but usually it is not. Most often the multipliers are taken from original work elsewhere and applied to a different context. Very often, this is without any methodological detail presented.

Clearly, the economic impacts of countryside recreational activities are embedded in the wider economy at local, regional, and national levels. It is not always possible to separate with precision the individual components and impacts. Perhaps more important is simply the recognition that the impacts are there and significant. It is then argued that development policies should maximise and grow these activities in the future.

Countryside Recreation and Sports a Neglected Sector

However, the fact that most studies of the wider economy neglect the specific contributions of countryside recreation and sports, and that those of this sector omit place their findings in a broader economic context, is a serious problem.

Information from individual studies can be very useful but more so if the reliability and accuracy are recognised. It is important that the limitations of economic appraisals informing policies be acknowledged. All economic models are limited by pre-determined methodologies, assumptions, and factors applied. This becomes problematic if the work and figures are uncritically considered.

However, it is useful to tease out the general trends and overviews from the diversity of case studies and methods applied. If despite individual limitations they tell a similar story, then this lends weight to their overall significance. For this reason, this present review includes studies over three decades strengthening the arguments presented. An important first step is in the review of the methods economists have developed and applied in recent years. This follows in **Section 3** and in the **Appendix**.

Despite the uncoordinated approach across countryside recreational activities, there are useful guidelines from work in related areas such as tourism evaluation, sports research, and nature conservation. The economic monitoring and modelling approaches of LIRC (see *The Economic Impact of Sport in Scotland* for Sport Scotland (2000) for example), modified by Cambridge Econometrics (see *Evaluating the Regional Economic Impact of Sport - the Proposed Model Framework*, Sport England ((2002)) are useful. Others cover arts, culture, and similar sectors. Most rely to an extent on the modelling factors discussed in **Section 3**. A problem for countryside recreation and sports is its diversity and hence the lack of current, reliable, comparable and accessible data. The information must be available at a cost that the industry is able and willing to afford. Furthermore, in order to be useful, the data need to be intelligently transformed into information.

Information Presentation and Interpretation

The strength of this economic sector is in part its diversity, but this also causes a lack of coherent assessment of its social and economic performance. To highlight the problem, consider the pie chart (Figure 3) presented for the Sports Industry (Gratton, 2004). This succinctly presents a view of the relevant activities and impacts as a coherent sector or industry, and is transferable to countryside recreation and sports. Furthermore, this simple image is separated into segments of activity, and so can be informative in terms of how the sector’s impacts present themselves. For countryside recreation and sports there has been no such coherent view, and the currently available information is not suited to this type of presentation. This is in part because key players and organisations do not see their links and synergies. There is no single organisation that collates, analyses, and presents the necessary data. This work for Sport England and CCPR is a move towards a more effective approach.

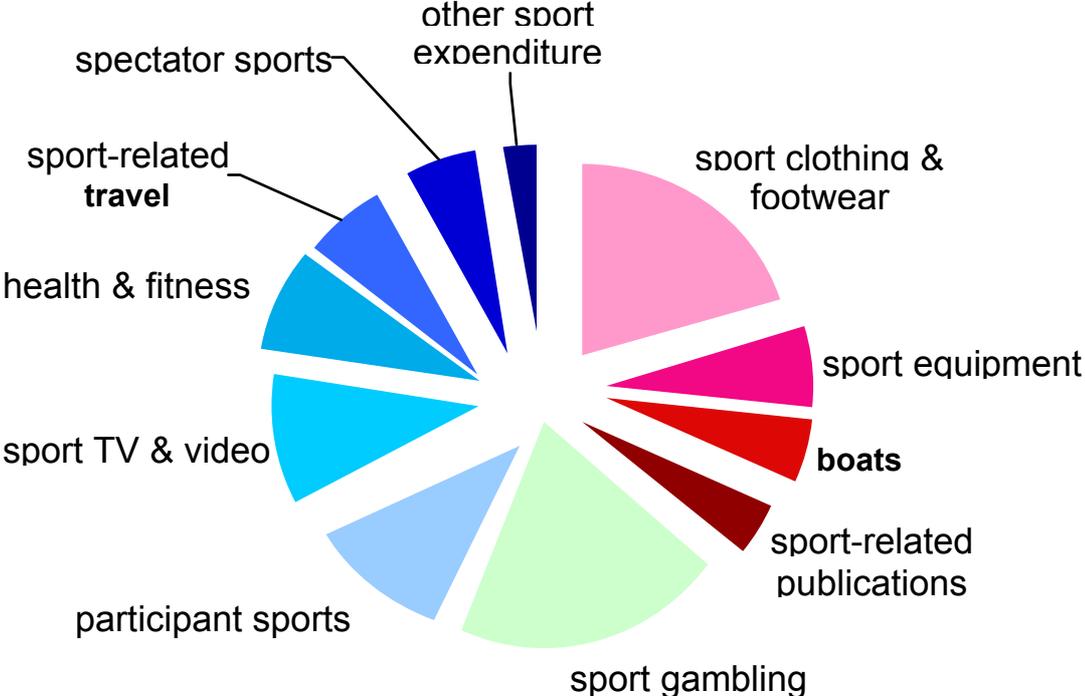


Figure 3. Sports Industry Component Sectors (Gratton, 2004)

Definitions and Scope - A note on terminology

The report considers the countryside recreation and sport industry. This term encompasses all types of countryside recreation and sport. Defining and conceptualising the countryside recreation and sport industry is very important. We define the countryside recreation and sport industry as encompassing all activity that has countryside recreation and sport as its focus. Activity is taken as that which in some reasonable capacity, caters for this industry.

It is useful to establish the production boundaries of the countryside recreation and sport industry and then examine links between the industry sectors and sub-sectors. This is particularly pertinent for countryside recreation and sport since many of the component sectors do not yet view themselves as a part of an industry.

This is a helpful approach since by broadening the perspective of the industry and its constituents will help facilitate different sectors thinking, planning, and operating as one. It is also necessary for an economic evaluation of the industry. By establishing the components of the countryside recreation and sport industry, and gathering information and data to match, a start is made to understanding of the contributions of sectors and sub-sectors to overall value.

This kind of information can be related to strategic planning to inform and potentially to test decisions. It can provide a quantifiable evidence base to justify strategic choices. Populating the conceptual approach with specific quantitative data will facilitate a further level of interrogation. Through aggregating sector-level data to provide industry totals will enable the generation of estimates for the overall countryside recreation and sport industry. However, it must be recognised that the currently available data are not robust and that to close the gap will be a significant challenge.

This review took broad definitions and scope for the activities considered. However, many technical reports and papers have quite specific and differing views and definitions of countryside, rural, outdoors *etc.*; and of sport, leisure, recreation and tourism. These definitions may be crucially important when applying multipliers or economic inferences on datasets, and can lead to under-estimates and over-estimates of economic and other impacts.

Recreation can be defined as:

Activity (or deliberate inactivity), voluntary, for the purpose of enjoyment and satisfaction, during time which is free from obligations (i.e. during leisure time); Can take place in any location (including the home). The specific activities during leisure, recreation, and tourism can be the same. They are therefore differentiated by setting / location, duration and sometimes motivations / attitudes / perceptions of participants.

Glyptis in *Countryside Recreation* (1991) avoids an actual definition but does specify activities 'beyond the urban fringe'. With the importance of the urban countryside to countryside sports and recreation, we believe this separation to be invalid. The review included relevant activities wherever they take place. Sharpley (1996) suggested that: '*countryside recreation encompasses a wide range of activities and pursuits, many of which are unplanned, spontaneous, and informal. Everything from a summer holiday in a country cottage to a short visit to a village pub can be categorised as tourism and leisure in the countryside whilst a multitude of traditional and more modern sporting activities, such as hang-gliding and jet-skiing, can also be*

included. The urban-fringe has been included, but not land inside the urban catchment.

The most widely accepted definition of *'sport'* is that in the Article 2 of the Council of Europe's European Sports Charter: *'..... all forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental well-being, forming social relationships or obtaining results in competition at all levels.'* Mintel (1998) *'Sporting Activities in the 'Great Outdoors' 29/01/1999* defined *'sporting activities'* to include leisure activities such as rambling and hiking, both dedicated and casual, without being competitive. As a professional definition linked to the commercial gathering of relevant data this is most relevant, and it strongly reflects the membership of CCPR and the interests of Sport England.

It is helpful to consider a particular activity and the difficulty of definition. A relevant example of the problems obtaining reliable data is the question of *'How many climbers are there in the UK?'* Rock climbing is a countryside recreational activity for which these problems arise, and that clearly has a major economic impact. These notes are taken from the British Mountaineering Club report *"Rock Climbing Survey Part 1 - Who are the climbers?"* (Dan Morgan, 1996). They demonstrate both the importance of the impact, and the difficulty in achieving a degree of precision.

To date there has been no systematic attempt to measure the climbing population. Mintel (1993) suggested that climbing was the fastest growing sport in England and Wales with 700,000 participants in 1993, an increase of 40% since 1989. Morgan (1996) felt this figure was inflated. BMC membership and climbing wall attendance statistics give a more conservative estimate of 150,000 active climbers in the UK is obtained. One of the difficulties of conducting such research is the definition of a *"climber"*. The Adventure Activity Licensing Regulations (Health and Safety Commission, 1996) state that climbing is: *"movement over difficult terrain which requires the use of hands as well as feet and where safety requires either the use of equipment or the skills and techniques of a rock climber"*. Another difficulty is assessing whether a given climber is *"active"* or if their participation in the sport is lapsed, or was simply a one off.

There are further problems arriving at an exact figure. Climbing is an informal sport, with participants under no obligation to register, inform, or otherwise give any indication of their interest in the activity. The clubs network is a useful method of establishing numbers of local climbers, but many climbers are members of more than one club. Over 20% of climbers are not involved with any club (Dan Morgan, 1996). Despite this, it is possible to plot the increase in popularity of the sport, and indeed outdoor activity as a whole by various secondary observations:

- Increase in number of retail outlets;
- Pressure for parking spaces at climbing venues;
- BMC membership figures (37% increase in 2004);
- Increased media coverage;
- Increased fashion interest in outdoor clothing.

These difficulties in definition and in effective identification of the scope of countryside recreation and sport apply right across the sector. As a comparison the Mintel survey also found that 4.3 million participated in rambling and hiking (2.6m men: 1.8m women), and other surveys such as for the Ramblers' Association and the Countryside Visitor Surveys suggest the figure is too low.

The range of primary activities and the associated secondary activities:

Countryside recreation and sports is a wide and complex area of activity that may be considered an 'economic sector' or even an 'industry'. In reality, it is made up of a number of components of other areas of activity, with broad overlaps dependent on definition. In order to understand and identify important functions like economic impacts, it is necessary to consider this activity as a unified 'sector'. There may be no agreed definitions as to which activities are in, and which are not. Some are within the scope of this study, and others are dependant on definition. However, problems of definition are peripheral to the main thrust of this report. However defined, this is a big and active sector, with major social and economic importance in the UK.

Information Sources and Data Interpretation

There is a great diversity of information from a range of sources, reflecting a large and varied sector. Much is in technical reports by stakeholder organisations (government agencies, non-governmental organisations, and umbrella networks) and / or their consultants. They are generally available as paper copy, or downloadable from the internet. There is also academic literature, particularly for better researched subjects like organised sports and tourism. These have generally attracted research activity and interest because of their clearly identifiable components and presence, and through their recognised economic importance - the funding has been provided to do this, and these sectors have been effective in securing champions for their causes. Other, areas such as many outdoor activities, countryside sports and recreation, and heritage- and nature-based leisure are relatively neglected.

For countryside recreation and sports there are very limited or piecemeal datasets, many activities being uncounted and informal. Many visitor sites such as country parks, climbing cliffs, potholing caves, nature reserves, and marinas simply do not count visitors on a regular basis. Information is then reliant on sources such as the Day Visitor Surveys undertaken for the *Great Britain Day Visits Survey*, and for individual areas such as National Parks. These surveys rely on scaled-up and interpreted samples, but are generally the best available.

There are excellent sources of information on commercial and social trends from organisations such as *Mintel* (Mintel International Group Ltd.). However, these are generally subscription-based for the industry and may place a rider on the use of their datasets. However, these do give a potential for insight into the more detailed aspects of consumer spend and economic impacts and they are available if paid for.

An example of a report from the commercial literature is given below. This is chosen to illustrate the relevance of such commercially sourced information to this review.

The importance of Outdoor Sports

From the report by Mintel (2004):

Outdoor sports may not enjoy the media profile of the UK's most popular spectator sports, but in participation and economic terms they comprise a significant sector of the overall sports market. In 2003, research revealed that walking is in fact the UK's most popular participation sport. Meanwhile a recent study backed by the Countryside Agency highlighted the economic potential of the outdoor sports market, finding that Britain's longest National Trail, the South West Coast Path, generates £300 million a year and supports 7,500 jobs.

Exclusive primary research has been used to build demographic analysis of key consumer groups within the market and to assess how these consumers behave and what attitudes they hold towards outdoor sports. This report offers a unique analysis of the current state of the UK outdoor sports market, (including demand for clothing and holidays) and outlines prospective future developments that will influence the shape of the industry in the short and medium term. These include:

- 1. Significant growth in participation levels in outdoor sports*
- 2. An overview of the market's recovery from the Foot and Mouth outbreak*
- 3. Increased interest in activity holidays both at home and abroad*
- 4. Details of advertising and sponsorship trends within the sector*
- 5. Analysis of the ages of participants with particular focus on the lucrative 'grey market'*
- 6. Key factors that act as motivators and deterrents for outdoor sports participants*

The sporting activities covered in the report include walking, scrambling, climbing, orienteering, abseiling, potholing and mountaineering. The term 'the great outdoors' refers to the broad landscape of the British countryside, and particularly to the grand scale rural areas - such as national parks and designated areas of outstanding natural beauty - whose expansive vistas, peaceful nature and dislocation from the urban environment are central to their attraction.

Extracted from: *Sporting Activities in the Great Outdoors* - UK - February 2004 Published by: Mintel International Group Ltd,

Information Sources

In the assessment of potential impacts of countryside activities, particularly recreation and sports, the available datasets and reports are clearly important. Due to the breadth of interest and the diversity of the sector, the sources are similarly diverse. Some of these sources are typical of information providers for sport, leisure, and tourism; others are from a range of environmental sources. Similarly, the information may be freely available, or it may be via specialist agencies and for subscribers only. Some of the sources, particularly those based with Governmental bodies or Government Agencies may be subject to change as organisations are merged or otherwise changed. However, it is worth summarising the main sources of information that informed this search and review. Information may be gathered from many sources and internet searches are increasingly useful. Several search engines and sites are helpful:

- Sciencedirect.com
- Leisuretourism.com

We have listed the various sources of information and data according the nature of the organisation (agency, NGO *etc*) or to the type of output (research papers, consultancy reports *etc*). Some are published research outputs; others are raw datasets and statistical digests.

Sources of Data and Information Potentially relevant to the Economics of Countryside Recreation and Sport

Central Government

- National Income Statistics
- General household Survey
- Family Expenditure Survey
- Employment Gazette
- Office of the Deputy Prime Minister

Public Bodies

- British Waterways
- Countryside Agency
- English Nature
- Environment Agency (formerly the NRA)
- Forestry Commission
- Monopolies and Merger Commission reports
- Sports Council - Sport England / Sport Scotland *etc*
- Tourist Boards
- Regional Development Agencies

Local Government

- Spending plans
- Annual Reports
- Local Government Advisory Board
- National Association of Local Councils
- National Park Authorities

Local Sites and Facilities

- Usage figures and reports

Statistical compendia

- Social Trends
- Digest of Sports Statistics (Sports Council)
- Sport England
- Sport Scotland

Commercial / Research Organisations

- Mintel
- Key Note
- Henley Centre for Forecasting
- Leisure Forecasts - LIRC / SIRC
- Horticultural Trades Association

Academic Journals and publications

- Leisure Studies
- Regional Studies
- Applied Economics
- Countryside Recreation News

Professional Bodies

- The Chartered Institute of Public Finance Accountants (CIPFA) statistical information service

Academic and research working papers and reports

- Very varied and often not available in libraries *etc*; may be published on the Internet, or available from researchers or from commissioning bodies.

Conference papers and reports

- Very varied and often not available in libraries *etc*; may be published on the Internet, or available from researchers or from commissioning bodies.

Newspapers and Magazines

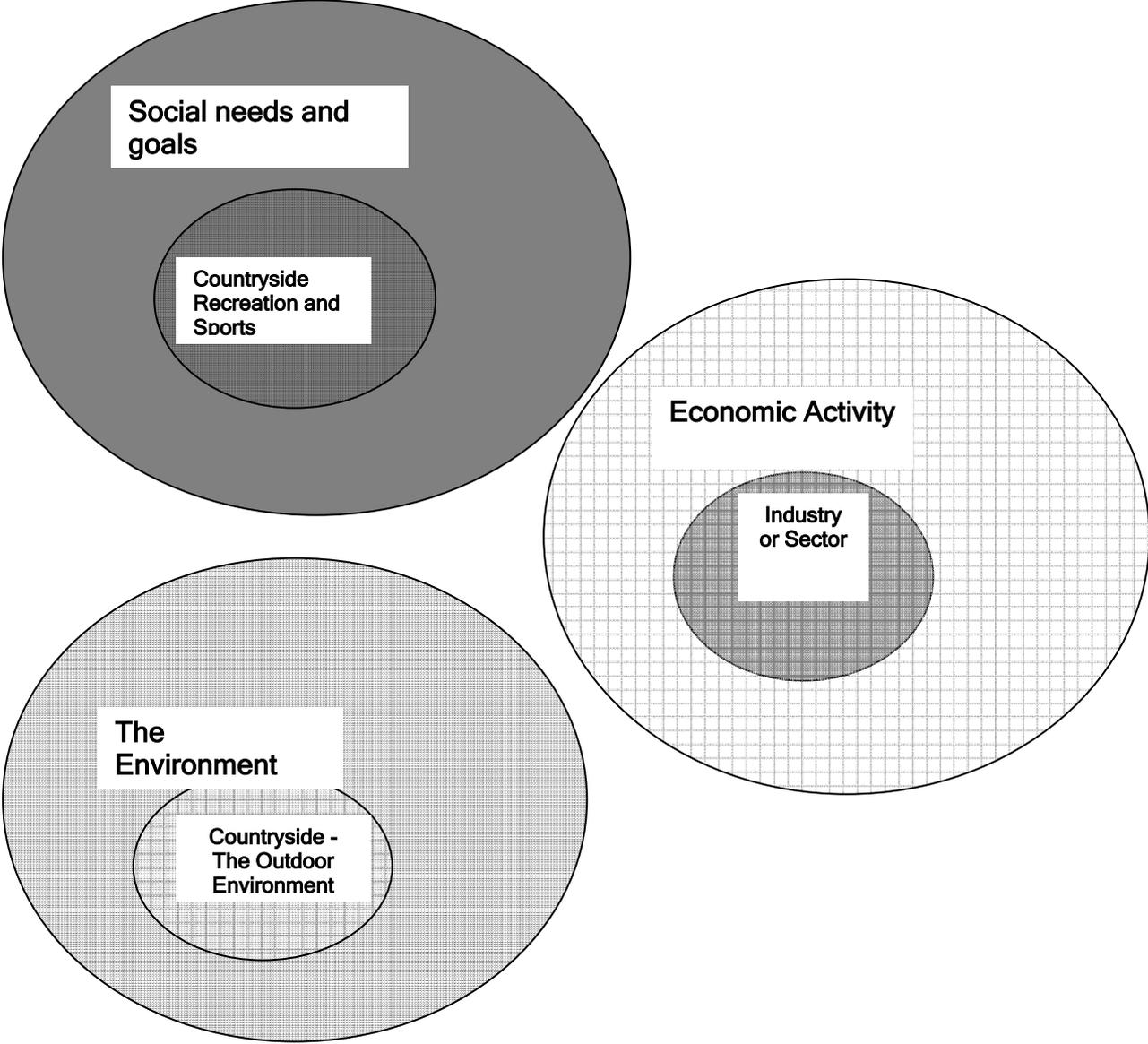
Trade Journals and publications

All of these were considered in the review and key sources and reports were identified, specific details being given in the Technical Appendix. Additional information was extracted from the *Outdoor Leisure Industries Database* of the *Tourism Leisure and Environmental Change Research Unit* at Sheffield Hallam University. This includes over 700 research reports and abstracts.

Focusing on the Issues

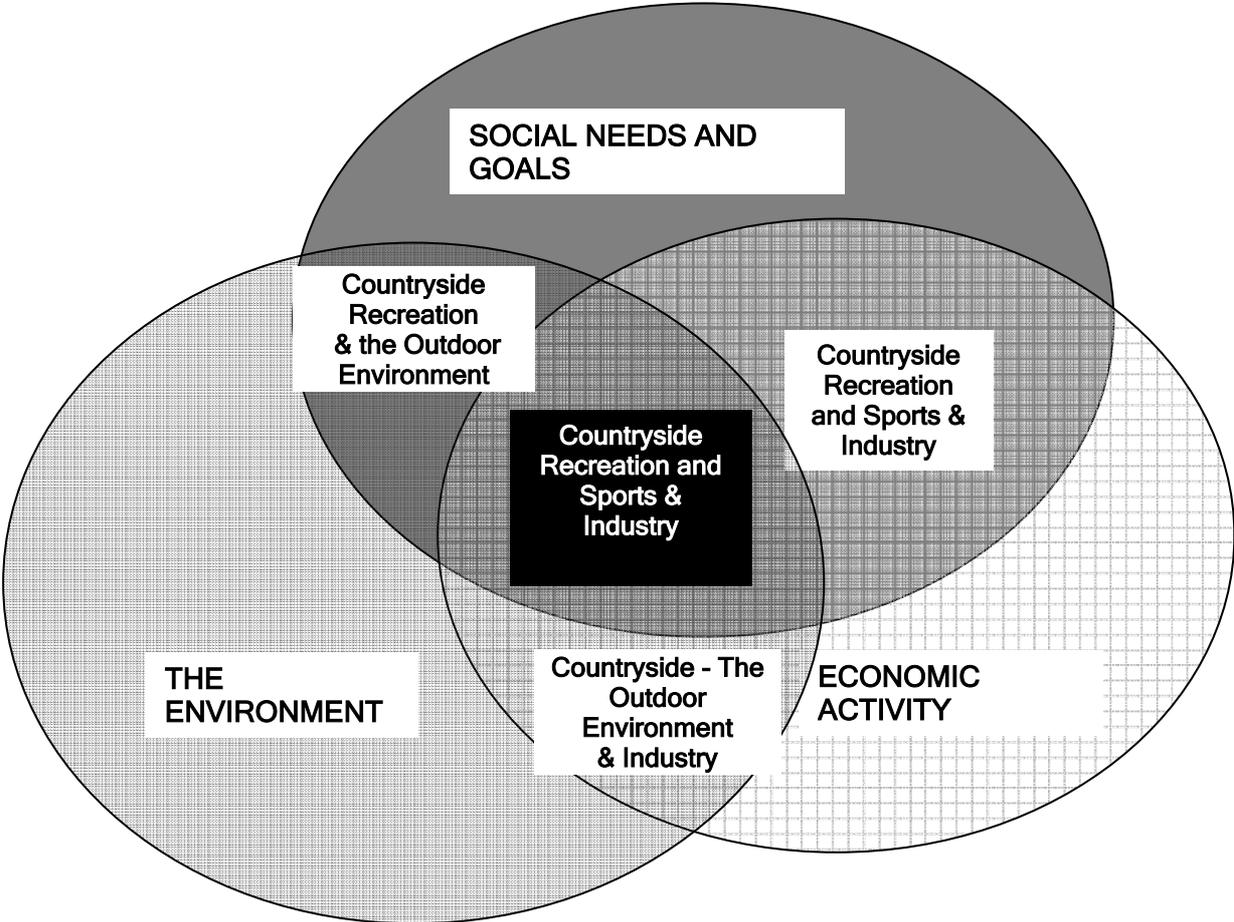
It is useful to place the focus of this review into a context of social needs, the economic activities, and the environmental resource within which countryside recreation and sport take place. This is indicated in Figures 4, 5, and 6.

Figure 4. The Areas of Interest



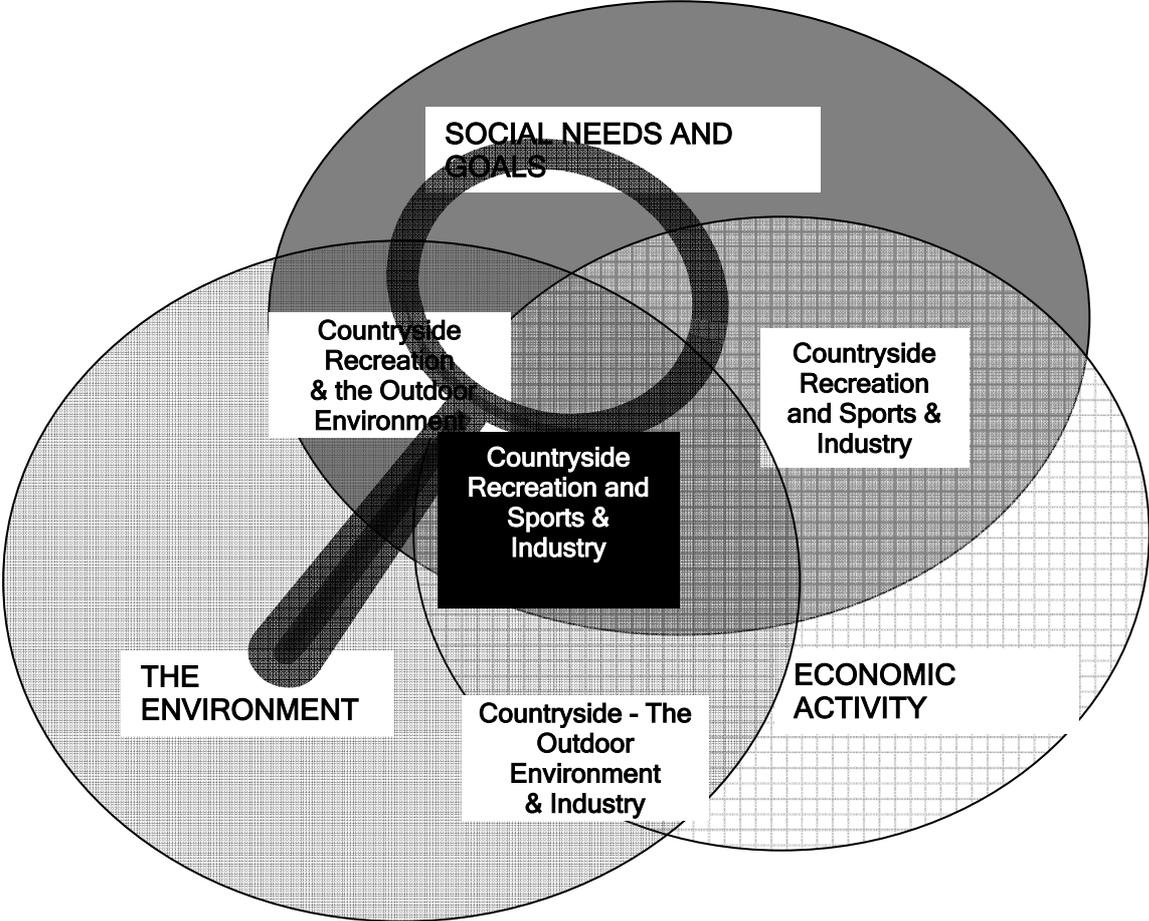
Bringing these spheres of influence and activity together even if just visually, draws attention to the core focus of the review:

Figure 5. Bringing the Areas of Interest Together



This highlights where the thrust and focus of the research lies.

Figure 6. The Focus of the Study



Some Questions Asked

This review addressed key questions of scope, economic impacts, appropriateness of datasets and models used, and the current availability of relevant information and data. This was with regard to the 'industry' or 'sector' identified in the earlier definitions as 'Countryside Recreation and Sport'. Either sector or industry may be used and each may be applicable in certain situations. Those in the voluntary 'sector' may be uncomfortable or unused to being described as an 'industry', but in terms of economic analysis this concept may be helpful. It may be helpful to regard the broader agglomeration of activities and players as an 'industry' made up of a number of relatively discrete individual 'sectors'. Ultimately, and of interest for a great many reasons, the question is:

'How important is the Countryside Recreation and Sport Sector and its component industries?'

This includes subsidiary questions:

- 1. What is the economic impact of the Countryside Recreation and Sport sector or its component industries?***
- 2. How large is the Countryside Recreation and Sport industry-related activity in relation to the rest of the economy?***
- 3. How many jobs depend on the Countryside Recreation and Sport sector or its component industries?***
- 4. What is the scale of voluntary and community involvement in the Countryside Recreation and Sport sector or its component industries?***
- 5. What is the scale of activity related to the Countryside Recreation and Sport industry sector or its component industries compared with that other related areas such as advertising, media, clothing and footwear manufacture, equipment manufacture etc)?***
- 6. What does the Countryside Recreation and Sport sector or its component industries contribute to Government finances or to meeting other targets?***
- 7. What are the local or regional impacts of the Countryside Recreation and Sport sector or its component industries and their contributions to rural life and communities?***
- 8. How does the Countryside Recreation and Sport sector or its component industries relate to other agendas such as health and quality of life?***

This review, dependent on secondary sources, cannot answer all these questions in full. However, it has identified the key issues and addressed all of them in part. It provides an evidence-based platform for future discussions, negotiations, and advocacy for the sector. It also highlights specific omissions in the current information base.

Section 3 Analysis

Section 3.1 Critique of Methodologies

Evaluating the Economic Impacts of Countryside Recreation and Sport

Background

A key reference here is the European Commission (1997a) *Evaluating EU Expenditure Programmes - A Guide*. The assessment and evaluation of the economic impacts of society's activities have been undertaken for centuries in order to inform decision-making, taxation, and policies. Increasingly sophisticated models and approaches have been developed by economists since the 1960s to guide policy, strategy and economic development. Since the 1960s there has been increased interest in applying these approaches to assess both market and non-market commodities. In countryside recreation, the Ministry of Agriculture and the Forestry Commission led this move.

For assessing sports impacts, the landmark report was that of the Henley Centre (1986) on *The Economic Impact and Importance of Sport in the United Kingdom*, for the Sports Council. This was further developed by LIRC (2000) *The Economic Impact of Sport in Scotland* for Sport Scotland, and more recently by Cambridge Econometrics for Sport England (2002; 2003). These approaches provide two useful starting points for analysis. Firstly, they establish for their area of activity or 'sector' (related to this review) some common approaches to data modelling. Secondly, and relevant but beyond the scope of this present study, they highlight the need within a defined area of activity (or sector) for an overall framework to guide the collection and collation of relevant information and datasets. There are two key issues:

- 1. Data / information gathering and collation in a unified and coherent way so that datasets are reliable and comparable within and beyond the sector.***
- 2. The manipulation and presentation (modelling) of data to enable valid interpretation.***

The Henley methodology relates to the first of these. Having evolved for sports economic assessment, and being widely accepted, it is pertinent here. It has a number of essential features:

- 1. The adoption of national economic accounting methods and conventions to ensure consistency of treatment, valid comparisons with other aspects of the economy, and the avoidance of 'double-counting';***
- 2. Identification and specification of a set of institutional sectors to cover the essential features of the industry (in this case sport) within the economy, and to establish its relationship with the rest of the economy;***
- 3. The use of a multiplier to 'measure' (perhaps better to 'derive a measure of') the additional impact on the economy over and above the expenditure on sports-related activity; this spending generates income for others (as wages, salaries or profits) some of which will itself be spent and in turn generate new income;***

4. The consideration of investment flows over the previous 4-5 years in order to overcome issues of volatility in investment spending that may invalidate an individual year;

We discuss the issues relating to Number 3 (multipliers) in detail below. The Discussion and Conclusion address the points raised in Number 1 in terms of the adoption of National Accounting Methods. The identification of the Institutional Sectors (Number 2) is also relevant to the countryside recreation and sports area. For Sport as an 'industry', the following sectors were specified:

- *Consumer;*
- *Commercial Sport;*
- *Commercial non-sport;*
- *Voluntary clubs and governing bodies;*
- *Central government;*
- *Local government;*
- *Overseas;*

Through the adoption of these segments of economic activity, a more full and valid appraisal framework has been established. This helps embed sport into the wider economy. Clearly, for a broad and somewhat divergent sector such as countryside recreation and sport, this raises logistical issues. However, there are lessons to be learnt. The LIRC and Cambridge Econometrics reports also consider issues of regional versus national needs and datasets. This is transferable to the countryside recreation situation. The specifics are discussed later.

National Accounting

The value of economic activity is usually described as *Gross Domestic Product* (GDP). This figure can be achieved in three basic ways.

1. A sum of incomes from economic activity broadly divided between that from employment and that from profits;
2. A sum of expenditure through consumption and adding to wealth (investment);
3. A sum of the products of national industries.

The UK National Accounts considers all three measures and hence three different methods to 'size the economy'. The approaches use largely independent information sources and this helps the validation of assessment through a process of triangulation. This gives more confidence to the estimation process.

The Output / Production Approach

Production accounts are the core of economic accounts recording the activities of goods and services production. The output approach to GDP estimation considers the production contribution of each economic unit of the overall economy, and the GDP estimate is the sum of these. It is based on the sum of *Gross Value Added* (GVA) of the economic sectors adjusted for distortions of taxes and subsidies.

The production approach is commonly used to estimate the size of an industry's economic value. The contribution (value added) of each economic unit to the inputs to the production process beyond the value of raw inputs themselves is allocated to the industrial sector. The particular industry's economic value is then the sum of all the value added by its component production units.

The Income Approach

This estimate approaches the problem from a different perspective, that of income generation. Incomes earned by nationally resident individuals, and UK-based businesses in production of goods and services are totalled to generate an estimate. GDP is obtained from gross operational surplus, mixed income, compensation to employees (wages and salaries and employers' social contributions), and taxes on production and imports minus any production subsidies.

Expenditure Approach

GDP can be estimated from measures of total expenditure on final goods and services produced within the national domestic economy. This derived from summation of final consumption expenditure by individual households, by Government and non-profit institutions serving households, by gross capital formation, and from net exports of goods and services. The calculation is based on:
$$\text{GDP} = C + G + I + X - M$$

[C = final consumption expenditure by households and 'Not for Profit Institutions Serving Households sectors; G = Government consumption expenditure; I = Investment or gross capital formation; X = exports; M = imports].

In order to avoid double counting in this calculation consumption expenditures are classified either as 'final' or as 'intermediate'. Importantly, and relevant to countryside recreation and sport, the expenditure approach aggregates only the expenditure on final consumption products (goods and services). Any expenditure by companies on goods and services that re-enter the production process i.e. 'intermediate consumption' is not included. It is assumed that the value of these goods will be captured by final product expenditure from intermediate consumption of goods and services. It should be noticed here that for countryside recreation and sport many impacts may be at a local or regional level through intermediate consumption, and be significant, but not register directly at a national audit level.

For national accounts, the three estimates based on production, income, and expenditure should generate similar values for national GDP. When estimating the size of individual industries such as agriculture and manufacturing, National Accounts adopt the Production Approach evaluating the industries on their GVA. Data on the costs of inputs and values of outputs for the components of an industry such as countryside recreation and sport are then required. This approach was tested for a component sector of countryside recreation and sport by Henley (2004) looking at the horse industry. They found that the necessary level of detail was not available. There were serious problems in applying existing data and standard methodologies to the horse industry, and this is likely to apply across the breadth of countryside recreation and sport. The Henley Centre adapted the estimation methodologies account for data limitations, but they place significant riders on this.

Theoretical Application of GVA to the Countryside Recreation and Sport Industry

If countryside recreation and sport was an accepted industrial classification in the National Accounts system, the statistically correct estimate of the industry, compatible with National Accounts for other industries and UK economy, would be its GVA. If the countryside recreation and sport industry was included in the accounts and the value added of production units correctly assigned to the classification, it would be valid to draw comparisons with other industries such as agriculture based on GVA.

To approach this comparison, a clear definition of the core industry and its component sub-sectors is needed. In order to establish the GVA it must be possible to separate final outputs and intermediate consumption. Given the complexity of countryside recreation and sport, this is challenging and well beyond the present commission. It is virtually impossible to place the industry sectors into neat boxes with clear distinctions between the core industry and its components. Definitions may lead to omission of significant aspects and contributions of the core and the component sub-sectors.

With the GVA approach to economic size estimation the value of inputs to the core industry production processes are subtracted from the output values. This equates to exclusion of the supplying sectors' production values. There are problems with this approach for countryside recreation and sport. Assuming the GVA of the core industry as being the economic contribution implies that without countryside recreation and sports and associated core activities, supply sectors would carry on, which is clearly unfounded. (It may be argued that the resources utilised in the supply sectors would be reallocated via market forces to elsewhere in the economy). However, in practice the economic impact of the core countryside recreation and sport industry on its supply sectors depends on their dependency. Many associated businesses within countryside recreation and sports are in fact highly dependent on activities of the core industry. Since these sectors are of great importance to countryside recreation and sport their value should not be excluded from estimate of the overall industry value. Henley (2004) use this argument to suggest that their use of expenditure flows for economic sizing is more suited to this industry. They suggest the inclusion of intermediate expenditure that is closely tied to the sector, but accept the exclusion of intermediate expenditures such as goods and services largely unrelated to the core industry (such as electricity).

Some Problems with the Approach

There is a very limited amount of business expenditure data available for the industry. The information falls short of an adequate basis for an estimate of intermediate consumption. For horses, the Henley Centre (2004) was unable to generate a robust estimate for the economic contribution. They produced a value corresponding to a maximum estimate of the industry's contribution known as '*Gross Output*'. This is in effect Gross Value Added plus intermediate consumption. Gross Output is not the statistical estimate of an industry's economic contribution normally used in industrial comparisons. Indeed, it is often suggested that to estimate economic impact of an industry by Gross Output, is to attribute to that industry output normally accounted for elsewhere within another industry classification of the National Accounts. An example given by Henley (2004) is the situation in agriculture. Farm-based production is regarded as the core industry and so Gross Output would include intermediate consumption on pesticides and fertilisers. However, in the National Accounts the manufacture of these is placed 'Manufacture of other inorganic basic chemicals' and attributed to the chemical manufacturing industry and not to agriculture. This means that comparisons between manufacturing industry and agriculture in terms of Gross Output could be misleading.

However, for countryside recreation and sport the situation is less clear. Not recognised as an industry classification for the UK economy, the output and value added by at the core and supporting sectors of the countryside recreation and sport industry are placed within other standard industrial classifications. This is a serious corporate disadvantage to all components of the industry.

Distinctions between GVA (at basic prices) and GDP (at market prices)

Gross Output (GO) is measured at market prices and as an approximation it is intended to get as close as possible to the industry GVA (allowing for lack of data on intermediate consumption). The difference is the 'GDP (at market prices)' and the 'GVA (at basic prices)' the two definitions are separated by the distortions of product taxes and subsidies. Allowance is made for such distortions to obtain GVA (at basic prices) from GDP (at market prices). For Value Added Tax (VAT), for example, not all expenditure on final consumption products goes to the producer / provider. A proportion of the income goes to the Exchequer, and this is still value generated by the industry. This is something we return to later. In order to get a true figure of GVA the value of taxes generated needs to be added. Any subsidies should be subtracted.

However, key data on tax and subsidies associated with countryside recreation and sport are not readily available. Therefore, what is being measured even when data are generated, equates to GDP at market prices and not GVA at basic prices. With lack of available data on intermediate consumption this leads to GO (at market prices) from GDP (at market prices). For the detailed study of the horse industry Henley (2004) gave a value of Gross Output (at market prices) as around £3.4 billion. However, they stress that even this figure should be viewed with caution. This is attributed to the lack of reliable data in key areas, and that in most cases the figures are very approximate estimates. Henley suggested that *'clarification of data, or changes to the estimates could, potentially, double or halve this estimate of the industry's Gross Output'*. So even with one of the few substantial assessments for a component of countryside recreation and sport, there are major reservations in reaching an actual cash figure.

To get this value closer to the industry GVA expenditure on intermediate consumption by production units / providers on goods and services outside the core countryside recreation and sport industry should be deducted. However, there are no existing data on the intermediate consumption expenditure of relevant enterprises that are adequate for any calculation. Generating this kind of information is potentially very complicated. Much key information would need to be collected in a business survey in order to generate data on costs and expenditures of businesses. Clearly, this process becomes more complicated as the desired level of information becomes higher. Distortion effects of taxes and subsidies on products also need to be accounted in establishing a value for industry GVA (at basic prices) as distinct from GDP (at market prices).

Triangulating the Industry Values

In view of the problems of available data, it is helpful to place quality checks on the estimates. This can be done by comparison with values from a range of studies on aspects of countryside recreation and sport from other research initiatives, even when the methodologies and raw data are questionable. The findings from this are presented in the Analysis Section. Henley (2004) undertook a detailed analysis of comparative studies specific to the horse industry. Their finding suggested major differences and discrepancies. These ranged from £2.5 billion at the top end of a very wide range of estimates. The lower band was down to £310 million. Henley point out that some of the lower estimates like the £310 million figure, are so out of date as to be virtually meaningless unless adjusted for inflation. The £310 million figure (1988) adjusted to current values is still below £550 million. This is still only one fifth of the higher band. Transposed to the wider countryside recreation and sport industry, this is a serious cause for concern.

Henley note that the problem in drawing comparisons between these figures, and those we highlight later, is that they often measure or record different things. For an industry as complex, fragmented, and multi-stranded, as countryside recreation and sport any assessment needs careful definition and this is essential if statistics on the scope of the 'industry' are to be valid. Many of the reports to which we refer fail to do this. Generally the scope of the 'industry' related to estimates is not given. Some values include 'ancillary' or 'supporting' sectors and others are of 'direct' activities only. Definitions are often not explained in detail if at all.

The Henley value of £3.4 billion for the horse industry was the highest of all the estimates for that sector. They indicate that this is because their figures depend on the values generated by the BETA study. This study has in turn been criticised for giving inflated industry estimate as a result of the weighting methods used. These affect the way that data are aggregated up from sample data to national estimates. The £3.4 billion value generated by Henley (2004) is therefore subject to the same limitations of assumed multipliers and sample sizes as the original BETA study. This is an issue that we discuss later, but also highlights the interdependence of supposed 'independent' studies, and the potential transference of errors and assumptions. Henley (2004) fully accept and indeed highlight this problem. However, difficulties arise when reports and headline figures are received second-hand and interpreted without the essential qualifications. The Henley Centre believes *'that much more robust primary analysis is needed before an estimate of the economic value of the industry can be established'*. The same qualification applies to the wider countryside recreation and sport industry, except that the problem is even more acute.

The values generated, with the worries and qualifications, can then be compared to the estimates of economic contributions from other UK industrial sectors. This was done for the horse industry by Henley (2004) and we present comparable data in the Analysis Section here. Estimates can also be compared to values calculated internationally (as done by Henley, 2004) but in our case, the client requested that this should not be done.

Non-economic Methods for Establishing an Industry Baseline

Employment within the Countryside Recreation and Sport industry

Along with economic sizing information, non-economic data provide insight into the character and extent of countryside recreation and sport. However, employment in the component sectors of countryside recreation and sport is quite difficult to assess. The data sources vary with different definitions of both the industry and of 'employment' (which may be number employed, full-time equivalents (FTEs), direct, indirect *etc*). Henley (2004) focussing on just the horse industry found estimates as low as 20,000, but in general, the data gathered seems to indicate that direct employment of the horse industry to be around 50,000. Several sources seem to concur with this figure, but the reader is forced to make assumptions on what is meant by 'direct', for comparisons to be made. For the Horse industry estimated 'Indirect' employment was around 200,000.

Henley (2004) also give an estimate of indirect employment in the Horse Industry. They consider that this is a very important part of the industry that indicates the wide ranging impacts on other sectors. As such this is an important consideration. These same arguments hold for the wider countryside recreation and sport industry. The conclusion for then Horse Industry specifically was that the scoping assessment gives a wide range for total employment impact, and *'a more thorough analysis of the*

employment of the industry as a whole and of the specific sectors is needed. Again this is mirrored but more so, by the wider countryside recreation and sport industry.

For the Horse Industry the estimates suggest: direct employment in industry = 50,000; indirect employment in industry = 100,000 - 200,000; best estimate of total employment in industry and supporting sectors = 150,000 - 250,000. According to Henley (2004) these figures compare with 212,000 for '*Agriculture, hunting and related activities*' and 381,000 for '*Sporting activities and other recreational activities*'. As is the case for comparisons in countryside recreation and sport, these economic value estimates overlap with elements of the horse industry employment. They do give a useful if rough baseline size of the sectors under consideration and this is directly relevant to the present review. The figure of 381,000 for sporting activities and other recreational activities is from the Office of National Statistics (Workforce statistics, 2003), and is of particular interest. This does give a starting point for sizing this industry but for all the reasons already discussed any such figures must be viewed with the utmost caution.

Consumers of Countryside Recreation and Sport

There is little information on the people taking part in many countryside recreation and sport activities. This was the case for the Horse Industry, Henley (2004) finding this very hard to define. They considered the BETA (British Equestrian Trade Association: *National Equestrian Survey* (Produce Studies Research, 1999)) estimate of 2.4 million riders to give a first impression of the importance of the Horse Industry to 'consumers' / participants in the UK. As with other countryside recreation and sport this is a complex sector to assess. For example, up to six million people may be interested in horseracing and this is a significant impact of the Horse industry. This is very similar to our view of countryside recreation and sport viewing on television *etc.* Henley emphasise the need to be very careful to avoid double counting consumer data, and we concur with their view.

In considering consumers or participants in countryside recreation and sport we aim to estimate the activity of the population through the various sectors and routes. It provides a different view of the size of our industry but not as a direct economic value. This approach can also help develop an understanding of the types of participation the industry may generate and its importance to local communities. In a rural context this may be particularly important.

Henley (2004) in their detailed consideration of the Horse Industry note the number of 'consumers' of each final consumption product from the industry as they define it. The numbers indicate relative importance of each sector in terms of consumer interest, but they again advocate caution. This is because of the significant overlaps between a consumer enjoying countryside recreation and sport, buying equipment, buying clothing, taking lessons perhaps, visiting related tourism attractions, and reading relevant magazines and books. It is clearly invalid to simply total these figures to give overall consumer numbers.

The Henley (2004) draws on commercially available market analysis from BMRB-TGI - the BMRB 'Target Group Index'. This is a continuous survey where data collection runs throughout the year so that seasonality does not skew results. The survey is based on a sample size of *c.* 25,000 interviews *per annum*. The self-completion questionnaire is placed with selected respondents at the end of BMRB's Access Omnibus survey. TGI is promoted as a market leader for yielding information on usage of 4,000+ brands in 500 product areas for those aged 15+. The TGI is updated

four times a year on a rolling quarterly basis, with results weighted to match known demographic profiles and re-weighted to the National Readership Survey.

As such the TGI is one of the largest continuous consumer surveys in Great Britain. It has questions on product use, media consumption, lifestyle, activities, attitudes, motivations and 'geodemographics' (age, gender, income *etc*). Any variable or combination of variables measured by TGI can be analysed and profiled in terms of demographics. This includes full information on age, sex, social grade, location / region, household income, working status, marital status, terminal education age, household characteristics, home ownership and employment status.

In addition, TGI has created a life stage classification based on the stage that an individual has reached in his or her life reflected both by their age, and the composition of their household. This takes the form of a twelve segment classification. This way of describing the population then has its discriminatory capabilities further enhanced by the addition of social grading (ABC1/C2DE) to create twenty-four way segmentation. Cross tabulations can be created, for example to compare behaviours across geodemographic sectors. Henley (2004) considered questions in TGI related to sectors of the Horse Industry:

- a) Horse Racing
- b) Show Jumping
- c) Horse Riding
- d) Riding Club
- e) Readership of Horse & Hound.

For each of these there are specific questions on frequency and form of participation. The results of each question may be considered separately, and responses from different groups of society (groups or regional groups *etc*) can be assessed, and responses combined to estimate the total number of people interested in at least one aspect of, in this case, the Horse Industry. A respondent's 'interest' is classified according to whether they participate in, pay to watch, watch on TV, or read about an activity in the papers.

If racing is discounted then around 10% of respondents were interested in horses; i.e. about five million people. This is not a complete picture since those younger than fifteen years were discounted. The Youth TGI surveys do not include relevant questions, and Henley highlighted the need for a targeted specialised survey. They also stated that interest in other activities within the field of the Horse Industry was not recorded. These problems will be relevant to the wider countryside recreation and sport industry, but again far more problematic for reasons already given. However, these commercial datasets do allow comparison of relevant data against other recorded sources. This is useful in developing or establishing context as long as the limitations are recognised.

For Horses (as a component of countryside recreation and sport) the overall interest rating is of 23% compared with 39% (Football), 28% (Walking/Rambling) and 19% (Cycling). The participation rating of 3% compares with 7% (Football), 27% (Walking/Rambling) and 13% (Cycling) for these three activities respectively. This approach could be usefully developed to give a broad estimate of interest in, and participation in countryside recreation and sport, but with the riders as previously described.

Comparisons with other Economic Sectors in Great Britain

At the outset, it is suggested that there are no economic figures that can be totally fairly compared with an estimate of the economic value of countryside recreation and sport. This is a unique industry made up of diverse components sectors that include sport, leisure, tourism, conservation, land management, education, and others. It is difficult to make effective comparisons between the industries, sectors, and categories due to factors such as definition and overlap.

However, the tentative estimates we provide in the discussion do allow some comparison with the sports, tourism, and leisure economies.

Critique of the Methodologies Reviewed

Preamble

There is considerable interest in gauging economic and other impacts of projects, developments, activities, and initiatives. This is across and between many sectors and may relate to attempts to focus investment, inform policy, or enhance political profile. This can be at the level of an individual organisation, project, or site; or for a sector of society or of the economy. The reports often present figures and profiles in support of claimed impacts or economic importance. This may be for an activity such as wildlife tourism or rock climbing, noted for other impacts, but not for economic importance. The studies reported generally suggest an evaluation of 'economic impact'.

To use such studies effectively and to undertake surveys and assessments so that policy is better informed it is necessary to understand the basic issues influencing this type of research. The details of economic assessment and evaluation are complex and the theoretical underpinning of the different approaches is subject to heated debate. In general, this is not relevant to the user of the findings. However, any organisation receiving such findings needs a basic grasp of the limitations of the methods. The main pitfall in economic assessment is in the unknowing misapplication of datasets and findings. Interpretation is the key and should be underpinned by awareness of the limits of the method.

This review demonstrates that many studies give little methodological detail. Most 'borrow' findings and inferred multipliers from elsewhere. This is not a problem as long as the interpretation recognises any limitations.

Assessment and evaluation generally attempt to determine the 'impact' of an activity, a project, an investment, or an organisation on the 'economy'. This may be at local, regional, or national levels. It is important to consider both what will and does happen through the activity or project, against what would happen in its absence. For a new countryside visitor attraction, this means considering not just the number of visitors and their impacts at a new attraction, but also what would happen at other sites in the absence of the new venue. It is also important to assess how a new site affects (sometimes adversely) the existing provision. Is the evaluation to assess real impacts and the extent to which the initiative or activity generates new economic benefits? Many studies fail to address these issues, and in such cases, it is impossible to demonstrate the extent of a new impact or the re-distribution of existing impacts.

There are real issues of limitations of the different approaches. Economic models exist to generate different outputs for a project or an activity. There are ways to minimise problems. *For example, if a number of different approaches, each with specific limitations and theoretical problems, indicate the same trends then this lends*

confidence to the findings. Research and results from outside the specific area of activity (or sector) may also inform a study undertaken. This review demonstrates the transferability of findings and approaches from sports and environmental sectors to activities in countryside recreation. The other critical factor is to ensure good, professional interpretation of assessments and of datasets. In economic evaluation, interpretation is the key.

Introduction to the Methodologies

This introduction to methodologies and issues is from an assessment of c. 600 individual relevant reports and sources. A detailed review of nearly 100 key documents is presented (as abstracts) in the Appendix. This gives a broad overview of the methods available and applied, and associated problems. Detailed analysis of the findings and the issues generated then follows.

Experience of economic assessment in the countryside sector suggests that it is prone to both under- and over-statement of its case and its evidence. Often for historical and cultural reasons, many organisations have been slow to see the importance of demonstrating their impacts. Other organisations over-state their perceived or claimed effects. This misinformation is through ignorance of methodologies and datasets, or may be deliberate in order to enhance political profile. These issues are discussed later.

The review of the reports on economic impacts of countryside recreational activities shows a wide range of methodologies used. There is no single accepted methodology. It indicates that these methods are often applied without comment on limitations. There is generally no clear statement of what the studies are trying to measure. A useful starting point is to consider the principles underlying the economic evaluation of activities.

i. The First Evaluation

In the beginning God created the heaven and the earth.

*And God saw everything that He made. "Behold," God said, "it is very good."
And the evening and the morning were the sixth day.*

And on the seventh day God rested from all His work. His archangel came then unto Him asking, "God, how do you know that what you have created is 'very good'? What are your criteria? On what data do you base your judgement? Aren't you a little close to the situation to make a fair and unbiased evaluation?"

God thought about these questions all that day and His rest was greatly disturbed.

On the eighth day God said, "Lucifer, go to hell."

From Halcolm's *The Real Story of Paradise Lost*, quoted in EU (1997)

ii. Defining Evaluation

Evaluate: to determine or estimate the value of (*Chambers Dictionary*, New Edition, 1998)

In this review, evaluation is concerned with establishing the value of countryside recreational and sports activities. It assesses the impact of the resources used for these recreational activities against their use in other ways. Logically there are two aspects to questions of this type. Firstly, there is the 'positive' or 'factual' issue of determining the impacts - costs and benefits - of the activity. Secondly, there is the

'*normative*' or '*judgemental*' issue of valuing of those impacts in comparison with alternatives.

The first is normally referred to as '*impact analysis*'. The second is an evaluation. The vast majority of the studies reviewed were *impact analysis*, and very few of them in practice were *evaluations*. The consequent problems are firstly that they do not give a true and meaningful assessment of the real impact on an economy, of an activity or an organisation. (This can mean that investment in a particular activity or facility, can and indeed does lead to a detrimental impact on the existing provision). Secondly, the studies would not fulfil the criteria specified by, for example, the Office of the Deputy Prime Minister, for valid economic studies to support investment or development. Grant aiding bodies such as the Heritage Lottery Fund, and Government Agencies are now specifying more rounded evaluations to support proposals. Failure to address this will seriously disadvantage the countryside recreation and sport 'sector'.

Since most impact analysis and evaluation methodologies stem from local economic evaluation, it is helpful to review the process. This short review of local economic evaluation provides a benchmark for the studies surveyed.

iii. What is Economic Impact Analysis?

Economic impact analysis is concerned with identifying and measuring the changes that have occurred (or are likely to occur) in an economy as a direct or indirect result of action such as policy intervention. These changes may involve either costs or benefits. Costs may arise when the intervention increased uses of resources. Benefits occur when the intervention increases the economy's production of market valued goods or services, or creates other socially beneficial outcome.

Note three important points in the definition:

- 1) It refers to *changes* in economic conditions *resulting* from some action. The aim is to identify what happened in the economy due to the action - the development activity - and which would not have happened in its absence, i.e. to identify and measure the *difference* that the activity made to the economy.
- 2) It includes both the immediate, *direct*, and intended effects of an activity, and other more distant *indirect* and possibly unintended effects of the activity. This involves analysis of how the wider economy reacts to the activity.
- 3) It covers both backward-looking investigations of what an action has achieved, and forward-looking investigations of what is expected to be achieved. Economic impact analysis is therefore concerned with predicting the likely implications of some action before it is carried out (*ex ante*), and with measuring the effects of the action after it has occurred (*ex post*).

There are significant methodological and technical difficulties associated with each aspect of economic impact analysis. Firstly, it is often very difficult to ascertain what would have happened in the absence of an action - the '*counterfactual situation*'. Secondly, while the direct implications of an action may be relatively easy to understand and measure, its indirect implications may be uncertain. Thirdly, while backward-looking impact analysis can rely on actual data if available, forward-looking

analysis must rely on predictions and '*guesstimates*'. This means that knowledge of economics is essential to appreciate fully the limitations, reliability, or accuracy of research.

These three aspects of economic impact analysis require careful use of economic theory, of the empirical techniques of economics, and of statistics. This is to judge the nature and size of economic effects of some policy intervention, and for the purpose of 'evaluation'.

The Central Elements of Evaluations:

The following are the core aspects of such an evaluation:

- An **analytical** approach based on recognized research techniques;
- A **systematic** approach involving careful planning and consistent use of the chosen technique;
- An emphasis on **reliability and transparency**, so that the findings could be replicated using the same data and techniques;
- A focus on **issues** relating to the activity being considered, including its **relevance, efficiency, and effectiveness**;
- A motivation to provide **users** with useful information on which to base decisions.

It is worth noting what evaluation is not. Evaluations are not purely scientific studies, although they may make use of scientific tools. They are primarily concerned with practicality - 'informing decisions, clarifying options, reducing uncertainties and generally providing information about programmes within their own specific contexts' (EU, 1997: page 10). They are not audits, since they must go beyond simply verifying how resources have been used, to making analytically-justified judgements about the 'value' of the interventions that use those resources. Finally, evaluations *inform* decisions they do not themselves constitute decisions, but are therefore useful in informing policy.

Clearly the majority of the studies reviewed are not evaluations, most being little more than an audit. Some studies do include elements of evaluation. The above is a useful checklist against which to assess the studies. It is clear from this review, that most studies relevant to this area do not meet these accepted criteria for critical evaluation, beyond the potentially misleading level of the simple impact analysis.

General Issues

Most of these studies seek to establish direct and indirect impacts of an activity or a project on the economy at the appropriate level. These impacts may be attributed to spend:

- On employment;
- On purchase of services and materials;
- On spend by participants, by visitors, by spectators, and by those employed.

These impacts can be direct or indirect and induced. Through the effects on market values or desirability of various commodities in an area due to the activity, site, or organisation, other impacts can be deduced, calculated, or inferred. In some cases, there may be other significant impacts through promotion and marketing of a site, a region, or an area. These are difficult to quantify and often neglected.

There are further issues in terms of not only of gross impacts, but also of the local supply chain, and local effects of retention of purchase within an area. Local sourcing and provision of materials and services will influence dramatically the economic impact of an event, activity, or organisation. This is especially important in judging the impacts of countryside recreation on a small, isolated, rural economy.

Along with local impacts there are many indirect effects of activities and organisations through the purchasing power of their members, employees, and participants at a national level. Many of these are hard to attribute specifically and therefore overlooked. At national level the impacts all benefit the Exchequer through the payment of VAT, employment-related taxes and deductions where appropriate. These issues are discussed later.

Methodological Issues

Design and Sample Size

A carefully designed and researched study can highlight the economic importance of countryside recreational activities. However, it must be appreciated that the accuracy or reliability of these studies is very dependant on the methodology which will make numerous and discretionary decisions affecting the conclusions. The reviewed studies all have inconsistencies and this must be recognised when reading them. There are dramatic variations between studies because of methodological issues, and the small sample sizes often used. This leads potentially to magnification of any errors if figures are then extrapolated to a higher scale such as from local to national.

Subjectivity

This is the biggest potential problem and applies to almost all the studies reviewed. There is significant subjectivity in the choice of data, multipliers and in the interpretation of results. However, it is difficult to find comparable studies for typical countryside activities. The only suitable cases tend to controversial ones and have had the multiple studies done precisely because of this.

Reviews of tourism studies using similar methodologies as those considered here concluded that there is significant exaggeration of the size of the impacts. This is important. Examples of this include Leiper (1999) looking at tourism supported employment, and Crompton *et al.* (2001) assessing the impact of the Springfest.

Multiplier Method

Use of multipliers is a method used to measure the overall economic impact of an activity on the economy at various levels, from local to national. The multiplier measures the total impact of additional spending on the economy by accounting for the so-called 'knock-on' effects, the direct, indirect, and induced impacts.

A Brief Summary of the Multiplier

Multiplier analysis is an economic tool applied to measure the overall impact of an introduction or 'injection' of expenditure into an economic system (Christie *et al.*, 1998). For countryside recreation and sports, such expenditures may include food, accommodation, transport *etc.* by participants such as walkers, climbers, sailors, bird watchers and others. The addition of these expenditures into a local economy

stimulates an increase in economic activity, in turn generating additional income and employment. Multiplier analysis is used to measure the size of these impacts.

For multiplier analysis, the initial spending is known as the direct expenditure. As the businesses receiving the direct expenditure then re-spend the money in successive indirect rounds, the number of transactions rises and the overall output expands. With this expansion in output comes an increase in the wealth of local residents, who consequently increase their consumption expenditure (induced effects). This is important in considering the real economic impact of spending on countryside recreation and sports activities. The total effect is far greater than the simple spend.

The nature of the data and assumptions underlying a multiplier means that at a local level they can never be anything more than indicative. For countryside recreational studies, this is not a problem, but recognising it is important in terms of interpretation of findings.

Input-Output Tables

The overall impact on the level of economic activity is expressed as change in output, income, or employment in the recipient economy. This is given numerically by the multiplier coefficient, calculated by dividing the sum of the direct, indirect, and induced effects by the amount of the direct effects alone. The size of the multiplier coefficients reflects the extent to which the local economy retains expenditure.

Various factors affect the size of an economy's multiplier coefficient, and the more narrowly the local economy is defined, the higher the leakages and the lower the multiplier (TRRU, 1975) (Christie & Mathews 2003). Important to countryside recreation and sports, particularly in small, remote, rural economies, are issues of local supply chain. If services and goods are sourced or provided locally, then beneficial impacts increase. Spending impacts associated with say caravanning or camping holidays increase dramatically, without actually increasing the level of expenditure, if the local supply chain is supported.

There are *several models* which will give different results, but it is generally thought that ***Input-Output multipliers*** are the most sophisticated. They are also the most expensive. None of the countryside recreation studies reviewed created an **Input-Output table** for their particular study. Several used existing models such as the Welsh and Scottish tables. For example, the National Trust (2001) estimated the economic impact of the environment on Wales using the 1996 Welsh Input-Output tables.

The **Input-Output tables** help quantify linkages between the environment and the rest of the economy, and resulting figures are impressive. However, there is significant subjectivity and the models rely on assumptions such as the estimates of economic activity being totally dependant in the case of the National Trust (2001) study of Wales, on the definition of 'the environment'. The authors themselves note that the process involved a number of arbitrary judgements and that there were also inconsistencies with data from different sources. Another countryside recreation example of the use of Input-Output tables was by Macaulay Land Research Institute (2000) study on the *Economic Impacts of a Ban on Hunting with Dogs in Scotland*. In this case, the Scottish 1996 Input-Output tables were manipulated to estimate the indirect and induced impacts. The direct impacts were measured by surveys of followers, hunts and input suppliers.

The most important element to consider here is the *accuracy* or *reliability* of the actual survey data. The estimates then rely on subjective judgements and the assumptions underlying the Input-Output tables. A major problem with all the countryside recreational studies reviewed is that 'countryside recreation' does not fit easily within the SIC (the Standard Industrial Classification) structure of the Input-Output tables. Countryside recreation and sports, like tourism, cross a number of SIC sectors. The Input-Output Tables are developed by dividing the economy into a small number of sectors. At the national level because of the large numbers, variations within a sector tend to average out. However, at the local level it is very unlikely that an Input-Output Coefficient generated nationally will apply.

Furthermore, as a small part of a local economy it is likely that underlying assumptions on constant returns to scale are not applicable and it is unlikely that the impact is atypical of the SIC sector utilised. If we consider the case of tourism, there is a long history of assessment of economic impacts, but a very diverse grouping of activities. The Organisation for Economic Co-operation and Development (OECD) and others have suggested Tourism Satellite Accounts (TSAs) as a suitable method of providing consistent economic valuation of tourism-based activity.

This methodology is considerably more sophisticated than any of the studies reviewed in this report. However, the need for a consistent and sophisticated methodology (which is also not without its own problems) has been identified for tourism. It applies equally here for the same reasons. This approach demonstrates that the issues and problems identified and encountered for countryside recreation and sports are not unique but occur equally in similar sectors of economic activity. Edmunds (1999) provides a useful review of the approaches and issues for Tourism Satellite Accounts.

iv. Borrowing multipliers

Other studies use different versions of multipliers (Christie & Matthews, 2003), the majority of studies borrowing them from other studies. To calculate an original multiplier is very expensive. The different versions of multipliers each have limitations and sometimes quite wide ranges. A countryside recreation example is the report for the National Trust (Price Waterhouse Coopers, 2004) measuring the economic value of the National Trust in Northern Ireland. On the basis of similar studies elsewhere this suggested a multiplier of 1.1-1.4. So for every £1 of direct expenditure, another 10p to 40p is generated in the economy. It is noted that this is a wide range of potential and differences in impact can be significant. Price Waterhouse Coopers (2004) concluded that the total impact of the National Trust expenditure on Northern Ireland was between £4.9 million and £6.3 million; the range being totally dependant on the chosen multiplier. There is a range of other assumptions behind the figures.

A number of the countryside recreation studies reviewed used multipliers with little information on the justification or source. For example, the RSPB study of Leighton Moss (Cooper and Rayment, 2000) was very detailed and included in-depth visitor survey. It used the Cambridge Model which suggests that "*Induced jobs can be estimated by applying appropriate rural based multipliers it is assumed that 0.05 induced jobs arise from direct or indirect jobs*". The indirect jobs which are more significant are "*estimated from the additional turnover generated in the supplier businesses*". However, the 'Cambridge Model' is a commercial econometric model, but for which no details of its assumptions or methodology are available. This can be a problem in comparing findings with other studies, and in the assessment of reliability. Importantly official guidance is available for the assessment of countryside recreation impacts.

Based on considerable evidence across a wide range of activities and sectors, the Office of the Deputy Prime Minister (ODPM, 2003) suggested that economic regeneration projects should use a multiplier of 1.1 to estimate benefits to a local economy.

v. The Use of Old Data

Many of the reports reviewed base calculations on previous reports or studies. However, the economy is dynamic and there are questions of the appropriateness of some information used. An extreme example is in Spurgeon *et al.* (2002) who used a 1984 study for a significant part of their calculation of the value of the economic capital value of salmon rod fisheries. Of an estimated £250 million value, £128 million was based on the 1984 study, already eighteen years out of date.

vi. Reliance on Other Studies' Results

Many of the countryside recreation and sports reports (such as Spurgeon *et al.* (2002) are based heavily on other studies. This is especially so for research using multipliers. This can make an evaluation of methodology very difficult without actually reviewing the previous work. For some countryside recreation reports, other studies are used quite validly, as a basis of comparison; a check that estimates are reasonable.

vii. The Presentation of Estimates

Many of the countryside recreation studies surveyed have technical sections where limitations and constraints on the research methods and findings are noted. These are frequently ignored in summary versions of the reports. Data are presented with an unrealistic level of accuracy and reliability (Allery Scotts, 1999; Christie and Matthews, 2003).

viii. Sensitivity Analysis

This is where the research considers changes in the key variables used to assess the response or sensitivity of the outcome to such change. The test values are re-used at different levels to gauge the response of the model to assumptions and changes. Such an approach is useful in helping to determine how sensitive the results are to the fluctuations in a particular variable, and any associated assumptions.

This is absent from most of the countryside recreation studies reviewed. Given the nature of the data, it is essential that sensitivity analysis is used to identify the most important assumptions and data sources.

ix. Variation in Methodologies

From our detailed assessment of the countryside recreation research, it is clear that there are wide variations in the methodologies used, even by the same organisation. The National Trust for example has had recent studies undertaken by different consultants, and they in turn used very different methodologies. This means that comparison can be very difficult even across a group of apparently similar studies.

x. Scaling Down Figures or Grossing Up Figures

Many of the countryside recreation studies calculate their figures by scaling down or grossing up figures, and in some cases calculations are not transparent. For example, *Valuing Norfolk's Coast* (Rayment *et al.*, 2000) uses the Cambridge Model, providing estimates of tourism activity using a mixture of data from national surveys and local information. Because this is a commercial model, it is impossible to validate the data. However, since the Cambridge Model is widely used in tourism studies, its acceptability has stemmed from established practice. This is often in the absence of transparent statement of its limitations

Although the majority of studies are undertaken as evaluations of the specific countryside recreational activities, the majority are at best only partial evaluation as an economic impact analysis. The economic impact analyses reviewed use a range of methodologies and a number of methodological issues are identified below:

- Interpretation
- Subjectivity
- The use of multipliers
- Borrowing multipliers
- Use of old data
- Over-reliance on other studies' results
- Presentation of estimates
- Lack of sensitivity analysis
- Variation in methodologies between studies, even for the same organisation

In *'Sports Economy in the Regions'* (various 2003 / 04) by Cambridge Econometrics, the same methodology is applied to the English regions in a consistent manner; the methodology is also described and justified in detail, thus producing a strong advocacy tool. This is a sound approach that can transfer to the countryside recreation and sports sector. However, as it stands this report says little specifically about countryside activities. As is the case with many studies on sports and indeed on tourism, they are examples of good practice but they also neglect or at least fail to identify specifically this area.

3.2 Comments on Data, Information and Methodologies Reviewed

Availability, Diversity and Interpretation

Data and other information are in diverse forms and from a range of sources reflecting this large and many-faceted sector. Much can be found as technical reports either by organisations themselves or commissioned of consultants, and available either as paper copy published reports, or downloadable from the web. The commissioning organisations may be government agencies or non-governmental organisations, and in some cases umbrella networks or co-ordinating associations. There is also a huge academic research literature and this is especially so in well-studied areas such as sport and tourism. Other subjects may be served less well.

For many countryside recreation and sporting activities, there are no precise and reliable datasets giving hard statistics. Much activity goes on uncounted and in an informal way. Many visitor sites such as country parks, nature reserves, and marinas for example simply do not count their visitors on a regular basis. In this case we are

reliant on the sources such as the Day Visitor Surveys and similar as undertaken for the *Great Britain Day Visits Survey* for example, and for individual areas such as National Parks. These surveys then rely on scaled-up and interpreted samples, but they are generally the best we have.

There are also excellent sources of information on commercial and social trends from organisations such as Mintel. However, these tend to be subscriptions based and they may place a rider on the use of their valuable datasets. These do give potential insight into the more detailed aspects of consumer spend and economic impacts, which may be both important and significant. This is particularly the case since most economic impact reports reviewed, look at visitors and participants, and their direct spend - on say entry to a site or facility, on purchases or services whilst there, on food, accommodation *etc.* There are very few that look in detail at *total economic impacts* associated with an activity, hobby, or pursuit. Our feeling is that for *Countryside Recreation and Sport* this may be very significant.

A simple assessment of outdoor activities would confirm the potential of this sector. The consumer spend on outdoor clothing and footwear, whether for serious sport or for fashion and casual wear suggests a massive impact; and some data are available from sources such as Mintel. The retail outlets for these items themselves become part of the visitor / tourist attraction for the Lake District and for Peak District for example. Leisure retail for Countryside Recreation and Sport must be huge.

Added to this are sales of other materials and equipment such as binoculars, telescopes, cameras and films, books and magazines, cds, boats, canoes, caravans, tents, other water-sports equipment, horses and their upkeep, bicycles, motor bikes and their maintenance and gear, golf equipment and materials. There is also the creation and consumption of the associated media. The total impact of all these is impossible to attribute for the reasons already stated. However, it is clearly massive, and it would be very valuable to be able to indicate at least the scale of the impacts.

Most of the case studies presented were reports commissioned or internally produced. Academic research papers are included in the full review, but relatively few are directly relevant to this study. Clearly the source of a report may influence both the methodology applied, and hence the data or other information generated or used. It will also affect the interpretation of the same. A report from a lobby group may have merit but will also be subject to the reviewer feeling that '*they would say that wouldn't they*'. In economics the balanced interpretation and assessment of information is paramount. As noted in Section 3 the methodologies are problematic and this causes problems when they are received or interpreted by a non-specialist. It does not necessarily mean that the findings or inferences are not valid, but that the interpretation, the confidence, and especially the multiplying up from say a case study to a national datasets requires extreme caution.

An example is the very useful study of the economic impact of caravanning (Allery Scotts, 1999), based on a study restricted to south-west England. The figures and spend levels are therefore questionable if applied to the whole Country. The suggested 'on holiday' spend is around £50 million per year, but a difference in regional spend levels could move this figure up or down by millions of £s. Furthermore, we know from detailed studies of visitor spend at RSPB nature reserve across the UK, that the spend levels do vary significantly between regions, and this is likely to apply equally to activities such as caravanning.

Similarly, the range of values presented often leaves enormous scope for variation. This is valid in that it simply means we do not know, or cannot calculate impacts with

a greater degree of precision. However, it does indicate the need for great care in taking datasets and applying them unknowing of the pitfalls, elsewhere. An example is Christie and Matthews (2003) *The Economic and Social Value of Walking in England* Report for the Ramblers' Association by the Institute of Rural Studies, University of Aberystwyth, which estimates an income associated with spend through countryside walking in England to be from £1.47 billion and £2.76 billion. This leaves a range for acknowledged error of £1.3 billion, which is a lot!

From the information collated and collected, in spite of the difficulties and limitations that we note and acknowledge, it is clear that the economic and social impacts of countryside recreation and sport are enormous. They are incredibly important activities for participants and spectators, but they are also major forces in the economy at every level from local, to regional, to national and beyond. Not only this, but in many areas the activities investigated can be expected to carry on growing.

There is an issue and a potential problem in that there is currently no accepted standard or process within the sector for evaluating or for monitoring impacts and progress in terms of socio-economic effects. It would therefore be very useful and informative if the organisations within the umbrella of CCPR were to collect and to collate relevant data to a more standard format using an SIR (or Standard Information Return).

Begged, Borrowed and Stolen

A serious issue identified by this review is the lack of methodological detail in many of the reports. In some cases there may be an implication that the compilers may themselves not have understood fully the limitations of the data or the models used. A question that we have asked therefore, is to what extent does this undermine our confidence in the overall trends indicated rather than that in then specific details of a particular report.

The most problematic situation, and one that occurs frequently with this type of research, is where the originator of a particular methodology or a dataset, was fully aware of the limitations and interprets them with due caution. However, if the information or approach (such as economic multipliers) is taken by a third party and used or interpreted without the same knowledge or caution. Serious errors and misinterpretation can follow.

A further problem can be the taking of a small sample or study, and maybe one with particular qualities such as a regional scope, or a particular period and extrapolating it to a scenario such as a national dataset. Again, there may be serious discrepancies. This is not such a problem if done knowingly, but the untutored application is cause for concern.

The same applies to many datasets that are '*generated*' from real data by applying multipliers or through other modelling to give an assumed economic impact. This may also be at the further stage of calculating associated employment through fulltime job equivalents (FTEs). Reports often use a conversion from say visitor spend to FTEs based on employment costs and conversions, and multipliers that are ten or more years out of date, or which were derived for a very different situation and scenario. There may be significant regional variation in these patterns too.

Claimed and Expected Economic Impacts

The problems identified suggest that caution should be exercised when claiming economic impacts. Some studies are very factual in that they simply present figures for membership, for fee-payments for entry, for consumer spend, or for visitor numbers or participants *etc.* In these cases, the data are what they are, and they make no claim to assess the bigger effects, the bigger impacts. Therefore, they are precise and reliable but tell us relatively little. However, in most cases there is an attempt to assess and to derive some form of overall economic, employment, or social impact. It is here that the more interesting results emerge but the problems too!

In recent years, it has become more and more commonplace for proposed developments, especially if they require potentially contentious planning consents, or wish to draw down public funding or charitable grant aid, to present an economic assessment of their expected or 'likely' impact. It is unlikely that a developer or other proposer will deliberately try to underplay their potential trump card or positive economic and hence social impacts. Therefore, human nature and the problems noted above have led to a number of big projects failing to meet what were over-enthusiastic expectations. This can be costly, embarrassing, and even terminally disastrous. A recent example was the indoor climbing facility in Scotland that closed after only a few months of below par operation. It actually attracted customers but not enough to meet its over-ambitious targets. South Yorkshire's Earth Centre had a series of similar problems despite huge amounts of public money. In many ways, these projects are reasonably successful just not financially viable.

In terms of facility development such as sports venues or tourism attractions there is a serious worry in some cases as to the effects of a new, maybe publicly supported initiative. Will it add to the success of an existing player through positive clustering and critical mass effects, or will it cause a presently viable centre to struggle through competition. If it is the latter, the any claimed regional economic impacts or employment need adjusting for losses elsewhere. With the Magna Centre in Rotherham for example, its hugely successful opening was associated with a major slump in the smaller but established attraction at nearby Eslecar. Assessment of economic or other impacts should take into account and subtract the 'dead weight' i.e. what would have happened in the absence of the event, activity, or initiative. Too frequently this is not done.

A final point particularly relevant to countryside recreation and sports is that they, the facilities they use, and the local businesses (shops, cafés, pubs *etc.*) that they impact on are often diffuse throughout an area. The situation is complicated if a location has a number of juxtaposed attractions. This may well be why the location is so attractive to visitors. Therefore, a canal with a walkway, a cycle-hire, a fishing lake, a country park and nature reserve, and a small museum and craft gallery will each claim 'x' number of visitors. In practice, they may visit several sites and take part in a number of different activities. Quite quickly, the total claimed impacts far exceed the real revenue experienced. The consequence is that the expectations and performance are by a gulf, and a credibility gap.

In urban planning and development, a consequence of these problems has been the intervention of the Government, through the Office of the Deputy Prime Minister (ODPM). The ODPM now lays down clear and strict guidelines for the process of economic and other evaluations and assessment for new projects and proposals. It seems likely that a similar approach will in due course follow for any evaluation taken seriously by Government, other policy-makers, and funders. This is something that

stakeholders in countryside recreation and sport should take cognisance of and anticipate.

Economic Benefits to the Exchequer

Benefit to local and national economies through this enhanced activity is important in assessing the significance of this sector. However, of direct significance to Government is that these billions of pounds of expenditure generate massive income to the Exchequer through VAT and through the taxes and other deductions of all those employed directly and indirectly within the sector.

So far, there has been no attempt to calculate this in the main studies or by the key stakeholders. However, it is clearly very significant, and we present some outline figures to indicate this potential importance. These figures have serious riders placed upon them. It is notable that most studies do not address this issue. This is usually because it is a very difficult and problematic calculation, and can only be achieved with reliability by a detailed, relevant case study. The problems are obvious in terms of the income to the Exchequer being associated with direct and indirect taxes through direct and indirect employment. The levels of taxation revenue through VAT themselves vary with the nature of the expenditure (some items and services being tax exempt), and with the specific employment. Any estimate that does not address these detailed points is clearly vulnerable to inherent errors.

Similarly, direct taxes via income are levied at different rates depending on the individual income profile, and without detailed, sectoral case study work, it is difficult to have confidence in any calculation made. It is likely that the levels of both VAT and direct income tax for at least some parts of this sector will be at a relatively low rate due to the high levels of part-time employment, and spending on items such as food *etc.* Nevertheless, it is clear that the overall income benefit to the Exchequer is very considerable. With this in mind, it is possible to calculate an expected income to the Exchequer, based on national economic trends, and applied to the available datasets. This we attempt to do. There is the very basic rider on this that both the taxation levels and the statistics on economic activities for this sector are incomplete. However, the study does yield some useful figures to exemplify the general importance.

With UK GDP valued at £1,099,896 m in 2003, taxes (VAT) less subsidies share 12.7% of the GDP. Hence, if we have a global figure estimated for the value of the countryside recreation and sports activities, we can estimate a consequent value of the revenue for the Exchequer. This is a very crude assessment but does give an indication of value. It is also conservative in that it omits employment and induced impacts. Some broad definitions are necessary.

GDP Measuring the UK's Economic Activity

Gross Domestic Product (GDP) is an integral part of the UK national accounts and provides a measure of the total economic activity in a region. GDP is often referred to as one of the main 'summary indicators' of economic activity and references to 'growth in the economy' are quoting the growth in GDP during the latest quarter.

In the UK, three different theoretical approaches are used in the estimation of one GDP estimate.

1. GDP from the output or production approach - GDP (O)

This measures the sum of the value added created through the production of goods and services within the economy (our production or output as an economy). This approach provides the first estimate of GDP and can be used to show how much different industries (for example, agriculture) contribute within the economy.

2. GDP from the income approach - GDP (I)

This measures the total income generated by the production of goods and services within the economy. The figures provided breakdown this income into, for example, income earned by companies (corporations), employees, and the self-employed.

3. GDP from the expenditure approach - GDP (E)

This measures the total expenditures on all finished goods and services produced within the economy.

The estimates are 'Gross' because the value of the capital assets actually worn away (the 'capital consumption') during the productive process has not been subtracted.

The Potential Value of Countryside Recreation and Sports to the Exchequer

Here we have taken some of the available statistics reviewed for the Sector and with considerable acknowledgment to the assumptions involved, calculated some broad potential implications for income to the exchequer in relation to countryside recreation and sports activities. Clearly, income from VAT varies between products (some being VAT excluded) and there are significant impacts of induced spending as well as the initial spending to take into account. It is first necessary to define some key economic factors.

The economic value of countryside recreation and sports must be somewhere between £15 billion and £25 billion. Taking such a broad figure we would expect a revenue to the Exchequer from VAT (taken as 14.6% of GDP) to be around £2.19 billion - £3.65 billion per annum. As a component of the National Economy valued at 1,099,886 million in 2003, this is perhaps 1.8%. Whilst this is a generalised estimate, it is conservative in that it does not include associated induced impacts in the economy, nor does it include employment tax revenue. The real value to the economy and to Government revenue streams is considerably higher than this.

Section 4

Discussion, Conclusions and Recommendations

Section 4.1 Some Key Findings

1. This review provides overwhelming evidence that the overall economic and social impacts of countryside recreation and sport are massive. This is in spite of the sometimes serious flaws in methodologies, and a lack of recognition of the components of this economic sector.

2. The impacts are particularly significant in rural areas, and there are serious strategic issues to be addressed if this key economic activity is to be secured and enhanced.

3. It is also apparent that the benefits to the Exchequer through direct and indirect tax payments (VAT) on goods and services, and through personal taxation and other employment contributions consequent on this activity, are very significant.

4.2 Discussion and Issues Arising

The Importance of Countryside Recreation and Sports

The combined economic impacts of Countryside activities - recreation and sport - are huge, running into billions of pounds per annum turnover and a consequent revenue stream to the Exchequer. We present figures and examples to support this assertion. Clearly, the precise figures are impossible to state with reasonable accuracy or reliability, and we do examine some of the issues related to this. Furthermore, the extent to which this is new economic activity and benefit is difficult to assess; except to say that it is very significant. The membership organisations of CCPR and the work of Sport England are very important in delivering this.

However, despite the debates amongst economists in terms of the additionality of countryside activities, the impacts are major, unequivocal, and significant. This applies to either a specific region of the Country or the Rural Zone *per se*. With the current parlous and fragile state of the economies of many rural areas in Britain, this becomes especially important.

Economic Impact and Rural Development

It is clear that rural development and the economy of countryside areas can no longer rely so totally on agriculture and traditional sectors for economic growth and social cohesion (WTTC, 1999). With travel and tourism, much of it related to countryside recreational and sporting activities, worth around 10% of the global economy and growing, they bring potential for economic development. This is along with an increasing market for experiences of nature, heritage, sport, adventure and cultural traditions.

There is potential to create jobs with a strong link to agriculture, construction and other local activities. This can help stem the migration of people from rural areas; offering good opportunities to young people; encouraging small and medium enterprises; stimulating local food production, crafts, community pride, heritage and nature conservation; to sustain local services and enhance quality of life.

Economic Impact and its Assessment

Whilst it is clear that the overall impacts are considerable, we identify serious issues and difficulties in the published literature and available datasets. The main problems are:

1. Many studies do not state the methodology used to arrive at the claimed economic value or impact. This has two consequences. Firstly, it is then difficult to assess the results in the context of the known limitations and assumptions of the modes used. Secondly, meaningful comparisons of datasets and information either within the sector or with other sectors are either difficult or even impossible. This also means that the potential for summation of individual contributions to give an overview for the sectoral impact is very problematic.
2. Despite the lack of transparency of many studies, there are clear difficulties when data, multipliers, or models developed at local or regional levels, are used to generate a national picture, and *vice versa*. This can lead to significant errors.

3. Clearly, some studies produced by lobby groups lack independent corroboration and interrogation of information. In some cases, there are significant errors through double counting of economic impacts.
4. There is an issue of the meaning and interpretation of datasets generated. In particular, to assess the economic impact of an action, it is necessary to take into account what would have happened without the so-called '*intervention*'. This is the '*dead weight*'. Many studies do not do this.
5. Related to this, it is also questionable how much of an impact is 'new' economic activity, and how much is simply moving economic activity between areas, regions, or functions. If yachting tourism brings in overseas revenue at a national level for example, then the impact would need to take into account any associated outgoing expenditure; either direct or indirect. In practice, this becomes difficult. This problem is avoided if the impact is considered merely within the locale being studied and wider benefits are not claimed. They may occur but it is more conservative and secure to avoid the specific claim.
6. This broad sector is difficult to consider as a whole due to its lack of coherence and identity. However, whilst this is a problem, it is also an opportunity. It is clearly in the interests of key players and stakeholders to manage activities, resources, and impacts in a sustainable way. It is also in the interests of all to clarify and maximise their positive impacts to Government, the public and the media. This is a major opportunity for stakeholders across the spectrum of countryside activities to work together for mutual benefit. In the longer-term, this can only help in the resolution of conflict over resource use.

The Consequences of Failure to Engage and to Evaluate Economic Impacts

Comparison with the success and effectiveness of the sports sector to co-ordinate and disseminate information on its economic importance, demonstrates the absence in the countryside sector. However, failure to engage and understand more clearly how the various players together forge this emerging sector is a serious problem. There are serious consequences of failure. It is urgent that key players and stakeholders co-ordinate better and more effectively, so policy-makers and decision-makers at all levels, recognize the sector's importance. A *Best Practice Guide to Economic Assessment and Monitoring* would be a step towards this. Much is available elsewhere and to assess this and tailor it for this sector would be straightforward.

In valuing countryside recreation and sport more effectively, there are direct and implicit consequences. Government and key agencies recognise that the rural economy in particular is highly dependent on tourism income. The broader impacts of countryside recreational activities are less known. The relationships between environmental quality, countryside activities, those that deliver them, and mainstream issues of economy and employment, health and quality of life, need to be made. This is to raise the profile of the sector and to help square the circle of sustainable rural economics. In presenting this approach, it is important to realise that it is possible in many cases to maximise the positive benefits of the impact of an activity or event. This may be by engaging more fully with local economies and suppliers, and perhaps setting up training schemes to employ local people to deliver the service or activity. Funding bodies and decision-makers will soon expect this as a matter of course. Embedding activities and organisations in local supply chains and in local

communities brings many benefits. For economic impacts, the difference is very significant. Sports and countryside activity participants can be '*leaky tourists*' with little gain for the local economy and this could be helped by *Best Practice Guidelines* for organisations and operators.

Growing the Industry - Education and Training

This review demonstrates that countryside recreation and sport are vibrant sectors, growing significantly with major impacts on people and on wealth. Important here is the potential for growth and to increase positive impacts of economic investment and activity, and jobs, especially in the rural setting. New economic proposals often do not deliver their claimed benefits, because they are not sustainable and have unexpected negative effects, or they pull money and jobs from elsewhere to no overall gain. The emergence of ecotourism concepts is an attempt to redress these problems experienced on a large scale with mass tourism.

This review indicates countryside recreation and sport have potential to grow successfully and significantly. It can increase both quality of life and wealth at many levels. This is something of significance to the sector and to Government. To generate these benefits and continue the trends of recent years requires vision, support, and co-ordination. Because much activity takes places in sensitive environments, and some such as nature-based leisure and tourism is directly dependent on that resource, it must be sustainable. This means better co-ordination and sharing between key players and stakeholders determined to resolve difficult issues. Countryside recreation and sport can bring together diverse organisations and stakeholders with shared interests in their community and economics. This translates into enhanced profiles at all levels, particularly in education and training. These not only have direct economic relevance, but they are the future of this broad sector.

More effective profiles recruitment of good, well-rewarded professionals to deliver the product means a more vibrant countryside recreational and environmental sector. This requires effective promotion not only of the importance of countryside and environment and of opportunities for work. More directed promotion about opportunities; more good professionals working in the countryside and in related areas, including education, training and environmental activities (adventure activities, outdoor sports, wildlife recreation) generates more visitors to country parks, nature reserves and activity centres. With more members of sporting, activity, conservation and heritage groups, there are more countryside leisure visitors, more overnight hotel stops, more sales of outdoor equipment, and a more vibrant rural economy. If this can link to consumption of local foods and other products, the enjoyment of local culture and wildlife experiences, then it is at the core of the rural economy.

Countryside activities, conserving the environment and heritage resources, should be promoted as being inherently good. Linking them to local and national economies, quality of life and health, and consequent economic benefits, will make policy makers and politicians take it more seriously. The new combined agency for England, Natural England is expected to have a lead role in future developments.

A Broader View

A major impact of the recent Foot-and Mouth Disease epidemic in the UK, was recognition of the economic and social importance of countryside visiting, and

associated recreational activities. In particular, the ban on visiting many areas highlighted the major economic impact of these pursuits to the sustainability of many local, rural economies. Several studies based on the crisis and summarised by the Countryside Agency (2001) showed the importance of countryside recreation to economy and employment in rural areas. In particular, the providers, visitors, and participants support many local rural services, accommodation, shops, restaurants *etc.* A widespread view reinforced after the UK Foot-and-Mouth crisis, is that tourism *per se* is a panacea for the countryside economy. It is not and for two main reasons.

Firstly, tourism and other recreational activities often do not directly support management of the landscape in which they take place; although some game management and country sports do. However, most tourism does not. In many cases, the costs of resource management and benefits from visitors lie with different organizations, or people. This is a big difference between modern tourism and more traditional, rural, economic activities.

However, where countryside recreational and sports activities link to sustainable land management then they help to bridge the gap. This is seen in the work of the National Trust, of the RSPB, of some angling organisations, and the Forestry Commission. Many big landowners with sporting interests directly manage the land to provide the sport. Land managers such as Severn Trent Water plc now provide sites for countryside recreation and sport. Through this they also manage sustainably a large, countryside estate. Associated visitors and sports participants have a massive and increasing impact on local, rural economies. Some off-reading organisations now manage land specifically for their interest, and others help to maintain green ways.

Secondly, much tourism is fickle and seasonal, when what the rural economy needs is stability, reliability, and predictability. Leisure day visits help give more, suggesting that leisure, tourism and recreation can aid rural regeneration. They can make vital services viable, but do not replace traditional rural economies. Again, this is where links back to managing the resource need to be established. Countryside recreation can be more predictable than much tourism and may be more resilient to short-term fluctuations and change. Again, this helps the economic impacts be more robust.

The need for relationships between local economies, countryside recreation and sport, environmental and heritage conservation, and tourism is well documented. With trends towards rural extensification and re-direction of agricultural subsidies, there is an increased need for recognition of links between leisure and countryside.

Research to date often lacks depth and economic facility in addressing the substantial contribution of many countryside recreational activities. Participants and operators have tended to focus on their own priorities and areas of interest. This may have disadvantaged the 'industry' in terms of wider recognition. This review helps address these issues and places CCPR and Sport England in a key role to move co-ordination forward. The application of appropriate economic models to this industry will help establish its relationship to the wider socio-economic context, and aid its recognition by other key players in leisure and tourism.

SUMMARY FINDINGS AND RECOMMENDATIONS

The primary question asked was:

'How important is the Countryside Recreation and Sport Sector and its component industries?'

This includes subsidiary questions:

- 1. What is the economic impact of the Countryside Recreation and Sport sector or its component industries?*
- 2. How large is the Countryside Recreation and Sport industry-related activity in relation to the rest of the economy?*
- 3. How many jobs depend on the Countryside Recreation and Sport sector or its component industries?*
- 4. What is the scale of voluntary and community involvement in the Countryside Recreation and Sport sector or its component industries?*
- 5. What is the scale of activity related to the Countryside Recreation and Sport industry sector or its component industries compared with that other related areas such as advertising, media, clothing and footwear manufacture, equipment manufacture etc?*
- 6. What does the Countryside Recreation and Sport sector or its component industries contribute to Government finances or to meeting other targets?*
- 7. What are the local or regional impacts of the Countryside Recreation and Sport sector or its component industries and its contribution to rural life and communities?*
- 8. How does the Countryside Recreation and Sport sector or its component industries relate to other agendas such as health and quality of life?*

Definition and Size of the Countryside Recreation and Sports Economy

The review has taken a broad approach to the definition of countryside recreation and sports. It notes issues of recognition and definition, and presents suggestions to resolve fundamental problems for this area of work and economic activity. The approaches of the sports and tourism sectors to place their economic impacts in an accepted nationally recognised framework for assessment are noted as good practice. There is scope for transfer of approaches to countryside recreation and sports.

The sport and tourism sectors provide useful context and comparison. Sport with £13 billion per annum of consumer expenditure, tourism has a turnover £53 billion per annum; and creative industries £60 billion per annum. In this review the value of the contributions by countryside recreational and sports organisations from a modest sample, showed an annual economic turnover of £850,000,000 as a minimum figure. The *Leisure Day Visits Survey for England, Wales and Scotland (2002-3)* indicated a

spending power of around £17 billion per year through countryside leisure activities. *Working for the Countryside - A strategy for rural tourism in England 2001-2005* (2001) showed rural tourism in England valued at £12 billion per year. Much of this comes from countryside recreation and sports. From a straight comparison of basic data, this is on a par with the wider sports economy.

What is the Economic Impact?

Available data indicate that countryside recreation and sport, whilst difficult to define, and poorly documented, are of great economic importance. Most studies give figures for money spent by visitors to an attraction, or participants in an activity. Some carry this further to assess the indirect and induced impacts of this economic activity. This review assessed the annual financial turnover of a sample of countryside recreation and sports organisations, to produce a figure of around £850 million for the sample in the UK. The overall figure will be much larger, and the indirect and induced effects of this economic activity will increase this.

Economic impacts are calculated from measures of additional expenditure of participants, spectators, competitors, officials, media and associated commercial enterprises in the area providing the experience or activity, or event. Conversion of additional expenditure to local income and jobs consequent on the activities or events uses multiplier analysis. Sport's £13 billion per annum consumer expenditure, accounted for 1.8% of the UK Gross Domestic Product in 2000, and employed 450,000 people, or 1.6% of the UK's total employment. Rural tourism's value of £12 billion per year supported 380,000 jobs. With £17 billion per year spent through countryside leisure activities in England, Wales and Scotland, the overall economic impact of countryside recreation and sport is certainly at this level. Specific studies show £6 billion was spent by countryside recreational walkers on trips in England each year, generating income in excess of £2 billion. Through this countryside recreational walking supports up to 245,000 full-time jobs.

It is also possible to consider the importance of specific aspects of the associated economy. For example, sales of outdoor clothing and equipment rose from £25 million in 1980, to over £1 billion in 2000. The economic impacts depend on location of production, marketing, sales, supply chain management, local sourcing and of course on the spatial scale at of the economy (local, regional, or national). With currently published data this evaluation is not possible. There are specific studies that attempt to give impacts and are a useful starting point. The South West Coast Path generates £300 million per annum, with countryside recreational walking on the path supporting 7,500 jobs. Informal recreation in the English West Midlands contributes around £420 million to the region by informal recreation, with £80 million from casual horse riding. The Mortimer Trail specifically had costs of £60,000 towards development and £10,000 per year on management, but returns over £183,000 per annum, generating 15% to 30% of trade in local tourism businesses.

Countryside recreation and sport give direct economic benefits. Of particular relevance to key government strategies and targets, they contribute to the regeneration of rural areas including market towns, improve health, productivity and quality of life, contribute to savings in the cost of health care, and reduce crime and vandalism. They offer social and environmental benefits that can change the image of a locality or a community and generate increased inward investment.

Employment

The employment impact of countryside recreation and sports is massive; certainly over 250,000 fulltime jobs. Many are in rural areas with low employment opportunities. Our sample of relevant organisations confirmed that they alone directly employ over 10,500 people. It would be useful for CCPR and Sport England to carry out a more comprehensive survey of this and to maintain an ongoing database for their members.

Participation in Countryside Sport and Recreation - Organisations, Participants, Members, and Volunteers

This is a very broad and active sector with the relevant sections of CCPR alone listing 60-70 member organisations. Most of have significant individual and corporate memberships. Not included in this are bodies such as the Wildlife Trusts with forty-seven partner organisations at County levels, perhaps 150-200 support groups, and around 500,000 individual members.

The organisation sample for this review confirmed the number of individual members as 7,200,000, with 350,000 individual regular volunteers in this sample alone. Overall figures especially in terms of participants and spectators will be much greater, and additional to these are the great number of local authority countryside services and volunteers, private businesses, and many government agencies in this sector.

Added Value from Countryside Recreation and Sports

This research did not include detailed work on "added value", but noted some contributions from voluntary sector sport and recreation and formal volunteering (as considered by CCPR).

Countryside recreation and sport are unique blends of the voluntary, public and private sectors; many organised activities being the responsibility of the voluntary sector. The most organisers are unpaid volunteers.

In countryside recreation and sport, many people participate and many watch, and most participants are amateurs. The number of voluntary countryside recreation and sports clubs and organisations in Britain is unknown, but is clearly large. Many are engaged in the promotion and welfare of community involvement in countryside recreation and sport. These clubs are the means for people of all ages to participate in any of the 100-200 countryside recreation and sporting activities that feature in British life.

The Value of Contributions

The research indicates an economic value of voluntary sector contributions. This suggests that government investment in the voluntary sector returns of £30 value for every £1 invested. Whilst there is no specific model to evaluate the return on investment in voluntary sector countryside recreation and sports, it is possible to apply the generic findings. Similarly, no estimate has been available of the value of the sector's organisations and paid staff for delivery to communities. For sport and recreation, the time given by formal volunteers was estimated as at least 187 million hours each year. Those active in countryside activities probably amount to more than this. For the purposes of grant eligibility, government generally places a financial value on volunteer time as around £50 per day (HLF guidance, 2004).

The Contributions of Countryside Recreation and Sports to the Exchequer

None of the studies reviewed attempts to give any overall estimates for economic and employment impacts. Neither do they place their findings in the context of the size of the target economy (UK, Britain, region, or location). We do manipulate some datasets to indicate minimum, conservative figures for these. However, it is not valid simply to add the various datasets together to produce an overall figure. Many in part address the same areas of activity, so double or multiple accounting is bound to be a problem. Some of the national surveys indicate an acceptable value of the countryside component of leisure or tourism. This is in the region of £12 billion per year for the former in England alone, and around £17 billion per year for the latter in England, Wales, and Scotland together. This gives a feel for impact levels however crude the estimation.

From this review, the economic value of countryside recreation and sports must be between £15 billion and £25 billion. Taking this broad figure we would expect a VAT revenue to the Exchequer (taken as 14.6% of GDP) to be around £2.19 billion - £3.65 billion per annum. As a component of the National Economy valued at £1,099,886 million in 2003, this is perhaps 1.8%. Whilst this is a generalised estimate, it is conservative in that it does not include associated induced impacts in the economy, nor does it include employment tax revenue. The real value to the economy and to Government revenue streams is considerably higher than this.

Assessment, Monitoring and Accounting

The first step in more effective evaluation of the economic impacts will be clearly to define the sector, the players, stakeholders, and the spatial location. To fully address these it will be necessary to adopt *National Accounting Methods*. The identification of the *Institutional Sectors* (Number 2) is also relevant to the countryside recreation and sports area. For countryside recreation and sport as an 'industry', the following sectors can be specified and will be important in future monitoring and evaluation:

- *Consumer;*
- *Commercial Countryside Recreation and Sport;*
- *Commercial non-Countryside Recreation and Sport;*
- *Voluntary organisations, clubs and governing bodies;*
- *Central government;*
- *Local government;*
- *Overseas;*

Through the adoption of these segments of economic activity, a more full and valid appraisal framework can be established. This will help in embedding countryside recreation and sport into the wider economy.

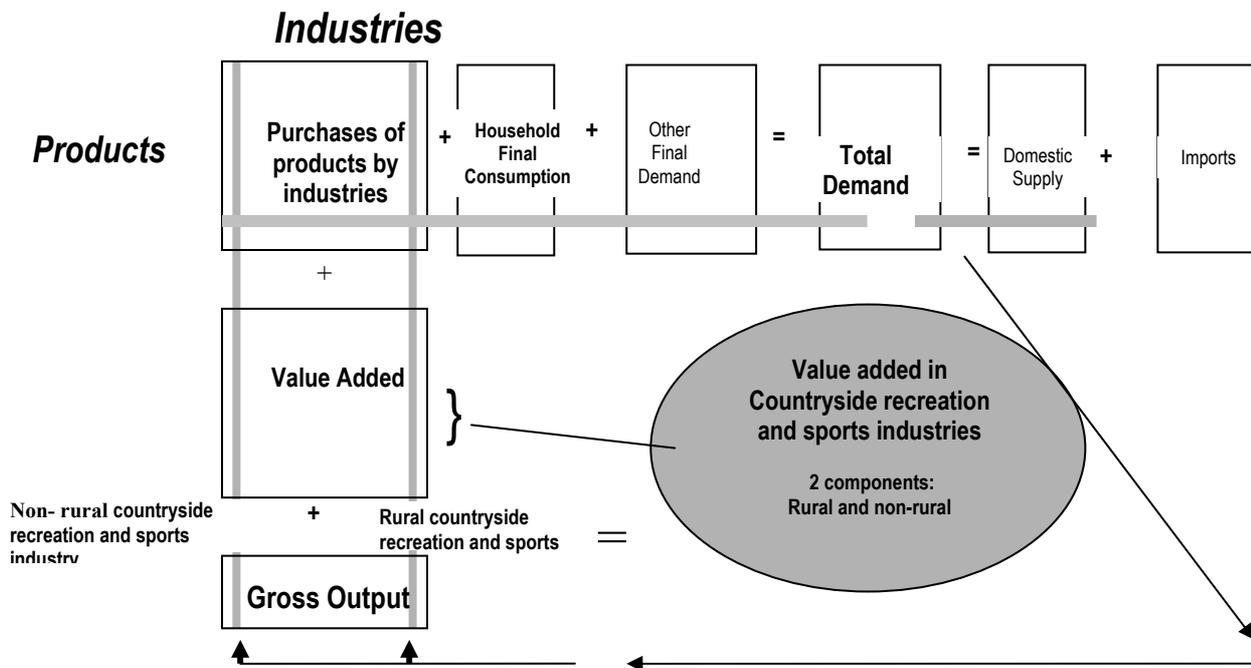


Figure. Economic Appraisal Framework for Countryside Recreation and Sport

For a broad and divergent sector such as countryside recreation and sport, this raises logistical issues and there are lessons to be learnt. The LIRC and Cambridge Econometrics reports on sports consider issues of regional versus national needs and datasets, and this is transferable to countryside recreation and sport. It is also pertinent to address issues of geographic or spatial scope as noted in the methodology review. The validity and ease of economic impact assessment may vary depending on the spatial definition chosen. Therefore, to assess a local impact of say a countryside recreational activity in a village in Cumbria can be relatively straightforward; transferring this up to the Cumbria region is feasible and has been done. Placing this within a national context is more difficult. Issues and impacts can be raised in broad and general terms, but the need to take into account factors such as dead weight, and the difficulty in assembling national datasets, cause serious concerns.

At a simplified level, it is useful to consider the broad ‘sectors’ that make up the provision of countryside recreation and sports activities. This is the standard, broad-brush description used for component and related activities such as sports, and for nature conservation.

The Sectors of Countryside Recreation and Sports Activities

The broad areas of definition are the three core groupings:

- (1) Private
- (2) Public
- (3) Voluntary

In an era of public-private partnerships, these definitions become blurred, but they are useful in helping to focus attention and to organise information. They help highlight over-looked contributions to countryside recreation and sports activities by a number of players. It is also worth considering the groupings also in terms of their area of delivery. For example, education and training are provided by all each of the three core groups, or by a combination. So the industry can be described in terms of either or both delivery and provider.

(1) Private (Commercial) Sector

The commercial sector is a major player in the provision of countryside recreation and sport. However, commercial enterprises are selective about the activities in which they are involved (only those that are profitable), or the components of an activity (such as retail sales) that they engage with. They frequently use existing capital resources and often rely on those in common ownership. Many providers of training, and of experiences or activities, are private, commercial businesses.

Some big private sector organisations such as water companies are major providers. Severn Trent Water plc has developed the Carsington Water site, which as a major countryside recreation and sports facility attracts over one million people a year and generates over £15 million for the local economy.

Pricing structures for some activities mean that some community members cannot afford the charges. Public or indeed voluntary sector investment in infrastructure (the capital of resource provision) may generate income streams via visitors and participants in countryside recreation and sports, but the economic benefits may lie with the private sector businesses. Cost and benefit are often not co-located. This is an important issue and one that CCPR may wish to address through its membership.

(2) Public Sector

Local Authorities

Increasingly local authorities are directed (through '*Best Value*'), to maximise financial gains from their facilities. Since the 1970s, there have been serious pressures on local government budgets that have affected how Local Authorities support countryside recreation and sports. Provision of Country Parks, Countryside Management Services, and Outdoors Centres, were all badly affected during the 1980s and 1990s. Yet Local Authorities support core facilities and resources, and provide for the socially excluded who are unable to join clubs or pay commercial rates. In recent years, these problems have surfaced. They range from the management of urban Victorian Parks and green spaces, through to National Parks. Surprisingly, in debates on these important issues, economic impacts of countryside recreation and sports are rarely considered. This report to CCPR and Sport England will help remedy the situation.

It is important that Local Authorities work closely with organisations such as CCPR and its members, to encourage participation, and with private sector partners to secure maximum economic investment and consequent benefit.

The contribution of Local Authorities can be huge. An example is Rother Valley Country Park in South Yorkshire. This has a mixed portfolio of countryside recreation and sports, with a major water sports centre. Having 600,000 visitors a year it is the region's biggest tourism / leisure attraction, employs around eighty people directly, and is worth over £6 million directly, to the local economy. However, it runs at a considerable loss to the Borough Council.

Additionally of course, local authorities are the major providers of education and supporting resources.

Agencies

Government Agencies and organisations such as Sport England, and the Countryside Agency, English Nature, the Environment Agency, and the Forestry

Commission, are major players in this area. However, it seems that many have been slow to recognise their roles and the associated economic and social impacts. Natural England will be a leading agency for this work once it is formally established.

(3) Voluntary Sector

In countryside recreation and sports, and associated education and training, the contribution of the Voluntary Sector is massive. Inspection of our Appendix of organisational profiles confirms this. These organisations have numbers of employed professionals, of volunteers, of members and participants, and often of spectators. The associated economic activity is clearly highly significant, and we provide figures to exemplify this. CCPR has a particular role in co-ordinating numerous voluntary and other groups in areas of countryside recreation and sport. A primary purpose is in the fostering of continuity and in the development of social capital.

There is a major network of educational providers in the voluntary sector, and CCPR are at the core of this. Some of the most successful providers of outdoor activity education are from the voluntary sector and they can have a big impact on a remote rural economy.

CONCLUSIONS

Policy, Strategy, and Investment

The evidence in the extensive literature and technical appendices demonstrates the importance of countryside recreation and sport at many levels. There are major benefits of social cohesion and engagement, and of health and fitness, but these are not primary subjects of this report. The activities are of huge economic importance at every level from local to national. Furthermore, this is a vibrant sector and with a capacity to grow more. There are implications for policy in both sports and in countryside recreation. It is important to make the most of the impacts by engaging better with local people and local supply chains; and to encourage this best practice guidance may help. For government it is important to recognise the importance of growing countryside recreation and sports activities but in a sustainable framework. Education is important to this and barriers such as insurance and liabilities should be diminished, not made worse. Recruiting good professionals into the sector is important and government should be aware that this links directly to long-term rural recovery.

There is note of warning too. As discussed, the profile and awareness of the sector have not been effective. The reasons are the broad range of different organisations and interests that make up this industry and the difficulty in accounting for and assessing them. This report makes recommendations to help resolve these issues. Lack of overall profile, means that decision-makers and policy-makers do not recognise the economic importance of the sector. Therefore, its growth potential is often not supported effectively. This is a key area for CCPR and Sport England to lead in co-ordinating and in lobbying government.

If Government is moving to a view of rural areas supported by a mixed economy of agro-environmental farming, and tourism, then countryside recreation and sport are keystones. It is then vital that they are grown, and in every sense sustainably. Today's educated youngsters on a fishing trip, a birdwatching expedition, a climbing lesson, or canoeing trip, will be healthier and better people for the experience. They are also tomorrow's paying tourists supporting the rural economy. With a vibrant and

positive sector providing increased opportunities for a range of well-paid and fulfilling careers, more young people will see a future for themselves as professionals. Again this is where CCPR and Sport England have vital roles to work with their membership and to represent the sector to government.

The recent demographic shifts and the associated trends in British society are well known. In the next decades these are likely to intensify with fewer children and the population under sixteen years falling. This will be to such an extent that it impacts on the potential participant / consumer market for leisure sectors including countryside recreation and sport. However, there are also changes in health and in the way the population is aging. With statements like '*50 being the new middle age*', the over 50s are becoming increasingly important spenders in the leisure economy. This is benefiting countryside recreation and sport, but throws up challenges to some sectors and players in the industry. An older but active population is increasingly engaging in activities such as rambling and social walking that are fully within the accepted focus of CCPR and Sport England for example. However, there is a huge increase in countryside visiting that is based around hobby gardening, and the visiting of historic houses and gardens, or nature reserves, and this will increase with demographic shift. This is very pertinent and these are clearly within the scope of countryside recreation and leisure, though outside the sports definition. There may be a reluctance to recognise the importance of these participants; to the ultimate disadvantage of the industry.

These trends raise important possibilities, so there may be fewer children but they will have more money spent on them and on their hobbies. In particular, though the affluent, over 50s with time on their hands will be increasingly open to new challenges and leisure opportunities. The '*grey pound*' will be increasingly important. The countryside recreation and sport industry may need to re-orientate its visions and services if it is to more effectively target this lucrative market. Older people are generally more affluent; over 50s accounting for 40% of consumer expenditure, and increasingly taking part in what were formerly considered younger peoples activities. Following this trend, one in five of the over 60s goes on three or more holidays each year. This is twice the figure for the 1990s.

Henley (2004) considered this situation specifically for the Horse Industry. They found that under one percent of the over 50s took part in horse riding activities, but this has increased over recent years. They suggest that the Horse Industry can connect with this emerging market which is increasingly affluent and importantly is willing to spend on activities and experiences. With affluent, time-pressured consumers seeking activities that help them improve their wellbeing, and willing to spend money on what Henley describe as 'quick-fix' happiness boosters, this is an important opportunity. Tourism trends show clear increases short-breaks that mirror this. Combinations of the pressures of time for those in work, and the need to get this quick fix booster, mean that these breaks are often four days or less. So in 2003 more than ten million people took two or more holidays in 2003, and many fit into this category. Countryside recreation and sport as noted specifically for horse riding by Henley (2004) have significant opportunities to engage with the short break market.

Other tourism trends are also relevant and a rising number of Britons takes regional holidays (21% of the population holidaying in Great Britain). This is a competitive market both at home and abroad, and overseas destinations often appear to offer financial value, for example with internet holiday companies offering weekend breaks in France for less than the price in rural Britain. Yet the British countryside is a major strategic asset for tourism. Regional distinction and character provides differentiation and increased appeal. However, to maximise the strategic benefits collaboration

between regions is needed to reduce fragmentation and address issues of poor infrastructure.

Henley (2004) also note that our notions of 'risk' have changed with two changes that run in contradiction. There has been growth in '*extreme*' sports, but a parallel increase in litigation. There is the idea that when something goes wrong, someone is to blame. This and the moves towards more complex risk assessments are squeezing what is possible, particularly in education.

Furthermore, there are demographic trends that mean fewer children but more affluent parents spending more money. Additionally workforce feminisation means adult women have higher disposable incomes with more money to follow their interests. These changes all impact on the future trends in countryside recreation and sport and associated participation.

Whilst these complex influences will continue, overall trends are very positive. The leisure, sports, and tourism economies will continue to grow as will the environmental industry. This trend will generate further potential markets for countryside recreation and sport industry. Consumers in the UK during the 1980s and 1990s experienced an enormous increase in disposable income. People are now around twice as well off as we were in the mid 1980s, and this has brought about changes in how we spend. With increased affluence expenditure has moved from goods to services, and then to experiences, the average British household now spending £3,500 per year on experiences (such as holidays, sports training and lessons, music *etc*) and £2,210 on material goods. The priorities for people have moved from addressing basic needs to lifestyle choices and leisure experiences that help them feel more fulfilled. Increasingly these leisure experiences include countryside recreation and sport. One explanation for the trends is that whilst disposable income has increased, job satisfaction levels have fallen, and so consumers will spend money to enhance 'well-being'. Henley (2004) suggest that by 2010 seventy-five percent of household expenditure will be on 'lifestyle and fun', up from 65% in 1995. They describe this as a move towards the '*Experience Economy*'.

With work dissatisfaction encouraging moves to a better work-life balance, people will invest time and money in leisure activities. Along with this is an increasing awareness of diet and exercise as important to health, and more adults than ever before belonging to gyms. This is an ideal social environment for countryside recreation and sport to flourish, but there is competition. In particular many mainstream leisure and sports facilities offer levels of sophistication and service well beyond that of the wider countryside recreation and sports industry. Mainstream leisure venues like gyms work hard to improve their consumers experience and the participants' perceptions of what is high-quality are constantly on the rise. Countryside recreation and sports facilities often fail to match this. One of the few studies to consider this is Henley (2004) for the Horse Industry and they note '*that buildings and facilities of the sector as a whole are in decline. Compared to other leisure venues, these facilities look substandard and out of date in comparison. Other leisure facilities offer coffee bars or meeting areas for clients; as one interviewee reported, you're lucky if you can find a toilet roll in a riding stable!*

Maximising Impacts and Growing the Sector - The Importance of Education

Assessment of available datasets confirms the importance and potential of countryside recreation and sport. They are components of a vibrant sector that have grown significantly and affect people and on wealth. Furthermore, they can be of immense local importance, especially in the smaller, localised economies of rural

areas. The potential for growth and increase in the positive economic impacts are important. This report makes recommendations for this future development.

This review indicates the potential for successful growth with increase in both quality of life and wealth at many levels. This is of great significance to stakeholders and to Government. There are important challenges if growth and development are to continue. This will require vision, support and co-ordination. A significant aspect will be addressing an enhanced profile at all levels, especially in education and training. These have direct economic impacts and are the future of the sector, and for an important part of the rural economy.

It is necessary to promote more effectively the importance of the countryside, and the opportunities to work in it. Directed promotion about opportunities will generate more good professionals working in the countryside and related areas. Having an effective profile with good, well-rewarded professionals working in the field will encourage a vibrant countryside recreational and environmental sector. This supports Governmental aspiration for rural renaissance. This and the associated delivery of education, training and environmental activities - such as adventure activities, outdoor sports, wildlife recreation, will mean more:

- Visitors to country parks, to nature reserves and to activity centres;
- Members of sporting and activity or conservation and other heritage groups;
- Countryside leisure visitors;
- Overnight stops at hotels;
- Sales of outdoor equipment *etc*;
- Vibrant rural economy.

Maximising and Achieving the Potential of Countryside Recreation and Sport

Countryside recreation and sport would benefit by a long-term strategy setting out a vision of where the industry would like to be in say ten years, and how the Government might and should support it in along this development track. This should address the industry's capacity for increased contributions to national and particularly rural economies in a context of sustainable development. The approach should aim to enable the industry to maximise and realise a ten-year potential embedded in wider aims of social inclusion and associated rural and urban-fringe development. To realise this full potential, the countryside recreation and sport industry strategy would seek to achieve four objectives:

- i) Identify key opportunities to increase engagement (participation / consumption) in the industry by the general public and so increase revenue streams;
- ii) Maximise the above through new recruitment but also by increasing the activity by those currently involved;
- iii) Identify key, specific, strategic issues (both internal and external to the industry) to free the potential of the industry to maximise positive externalities and minimise negative ones;
- iv) Identify the means necessary to implement the strategic plan.

The Representation and Structure of the Industry

It is clear even from this superficial review that representation across the breadth of the industry is very patchy. There is lack of corporate identity and perhaps even a degree of distrust between the sectors that make up this industry. Furthermore, the wider industry is not effectively recognised by bodies such as key governmental agencies. Yet there is clearly considerable potential for co-operation and mutual gain if each of the sectors catering worked together and co-operated to maximise impacts and benefits. More effective co-operative promoting will have knock-on effects on associated sectors.

Countryside recreation and sport clearly have significant potential to contribute to multiple social, economic, health, and environmental agendas in Britain. Vital to the effective achievement of this is recognition and prioritisation in its own right. Countryside recreation and sport need to be promoted as a sector of established industries (such as tourism) or an industry itself, with significant potential to contribute to the British economy. Britain has much to offer in this area with linkages and potential to both rural and urban heritage and assets. There are potentially lucrative opportunities for operators, trainers, and providers, together associated benefits for equipment manufacturers, retailers, and providers of hospitality *etc.* The open spaces of National Parks, Areas of Outstanding Natural Beauty, country parks, heritage sites, country houses and gardens, nature reserves, long distance trails and others offer major opportunities. Many of these are already being taken or developed, but the potential to maximise the benefits is yet to be fully addressed.

Countryside recreation and sport has significant potential to contribute to economic regeneration and social cohesion. This is especially in remote rural regions but also in and around the urban fringe and urban centres. There are major opportunities to support farm diversification and small businesses in tourism, leisure and associated catering sectors. However, with a lack of robust data on countryside recreation and sport it is impossible to be certain of the direction in which the industry. However, it does seem that in general overall participation or consumption is growing. Some individual sectors may have age profile problems, and other may be in decline.

It would benefit this wider industry for there to be improved co-ordination between key stakeholders. In particular it would be highly advantageous to develop better recognition of the industry within the key component sectors, and also by decision makers and funding bodies. To achieve this there are significant benefits in developing a longer-term (perhaps ten-year) strategy. This should consider opportunities and threats to effective development of the wider industry.

Countryside recreation and sport are a part of the leisure economy, competing for a share of consumer spending on sport and leisure. The present and potential future drivers of the sport and leisure industries are described by Henley (2004) for the Horse Industry as '*a mass of contradictions, which work very well to explain the contradictions within the horse industry itself. Consumers have more money and a greater desire for experiences that boost their wellbeing, yet are increasingly time pressured and thus are looking for time-efficient ways to enjoy their leisure time*'. The same applies to the wider countryside recreation and sport industry but with even more complications. In particular there is a major overlap between this activity and those in both tourism, and in the environmental industries.

Maximising Local Impacts: Local Distinctiveness, Local Supply Chain, and Local Employment

The economic benefits of countryside recreation and sports activities can increase dramatically with enhanced stakeholder performance. By promoting local design, manufacture, retail of goods and services; and by training and employing local people, the benefits to a rural area rise manifold. This can apply to goods such as outdoor clothing. Hawkshead outdoor clothing in Cumbria is a good example.

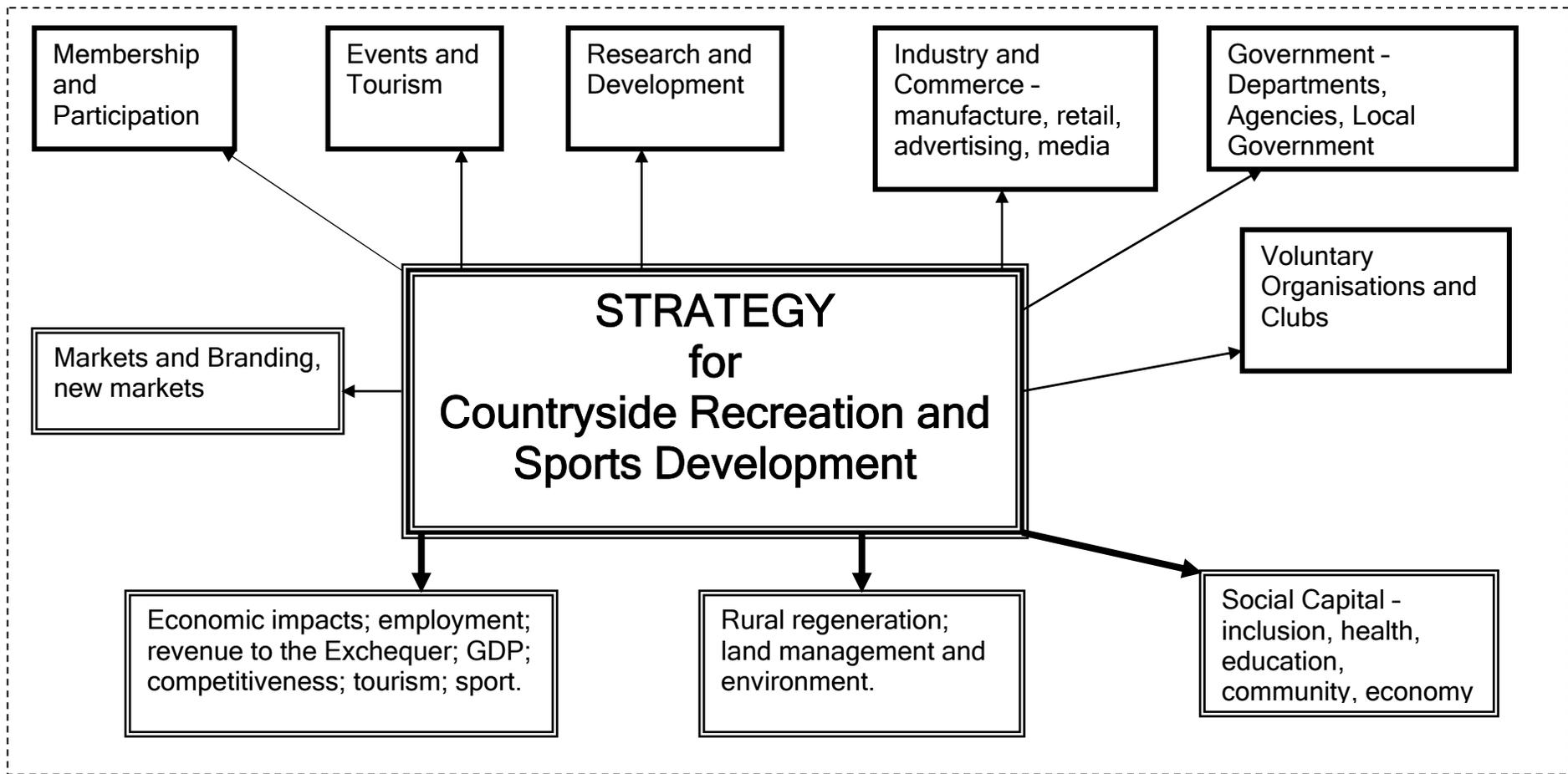
These benefits can be achieved in other ways; for example by consumption of local foods, other local products, enjoyment of local culture and wildlife experiences, and the employment of local people. For example if the guides or trainers for an outdoor activity are local, or at least live locally, the economic impacts of their salaries make a huge difference to the local economy. If they live in the local town or city, then the impact reduces considerably.

Opportunities to Spend

To generate economic impacts through countryside recreation and sports, there must be opportunities to spend. Without this, the impacts are minimal. To raise levels of economic impacts it is necessary to increase levels of participation, and opportunities to spend by those who do. This is an important message for both organisers and for strategists. CCPR and Sport England have important roles in taking this message to their networks and members.

Key Stages to a Strategic Plan

- i) The idea of co-operative working, with genuine commitment to long-term strategic development and growth within the wider countryside recreation and sport industry and its component sectors should be established;
- ii) It is recommended that a key team of stakeholders is established from across either the narrower sector or ideally the wider industry. This team would scope the potential strategic issues and players across the industry, establish the principles of co-operation and likely barriers, and establish the process and resources for developing an agreed strategy and ten-year plan;
- iii) There is a need to develop a national strategy and ten-year plan for countryside recreation and sport, but supported local level implementation plans and a nest of plans for individual sectors of the industry;
- iv) The National Plan will need to establish who will do what and when for the industry and its component sectors. It will be worthwhile at an early stage identifying perhaps five key strategic goals. These might include short-term easy '*wins*' and longer-term goals. There should be clear time-lines for achievement;
- v) The Strategy and Plan should be underpinned by guidance on best practice. An early task will be to establish good practice for the collection, collation, and analysis the key economic and participation data as noted lacking by this review.



Strategic Conceptual Framework for Countryside Recreation and Sports

The Researchers Conclude:

'Participation in countryside sport and recreation makes a massive contribution to the delivery of relevant Government agendas and to rural economies especially.'

Whilst economic impacts are accounted in the national economy, they are neither attributed nor recognised as resulting from countryside recreation and sport activities. This causes serious oversights in policies and strategies that may have major repercussions for individuals regions and for local, rural economies.

Active participation in countryside sport and recreation is a significant area of formal volunteering, and this has social and economic value. Countryside sport and recreation organisations and informal participation make big contributions to rural economies. They also foster social capital through direct impacts of activities and the indirect effects of employment and related services.

- *Countryside recreation and sport now account for a significant amount of consumer expenditure, GDP, and employment;*
- *Major countryside recreation and sport events can generate significant impacts on local economies;*
- *Countryside recreation and sport can help drive and support rural economic regeneration;*
- *Much economic impact is through the sales of associated goods - equipment and clothing; the 'opportunity to spend' is critical in securing economic benefits;*
- *Countryside recreation and sport goods sector is dependent on four factors: research and development; technology; product design; and innovation; and many key players in this sector are UK based;*
- *Retail outlets themselves become part of the inherent attraction of a location to countryside recreation and sports visitors and participants - the growth of outdoor shops in Cumbria being a classic example of this.*

The Vision in a Decade

1. *A identifiable, recognised and quantifiable economic sector;*
2. *An increased total economic activity to around twice that at present, and sustainable;*
3. *Countryside recreation and sports open to, and engaging a wider sector of the community - from all ages, and social or ethnic backgrounds;*
4. *Countryside recreation and sports supporting rural regeneration and associated social benefits.*

Major Policy Implications and Recommendations

Countryside Recreation and Sport & Economic Development

The most significant need is for the sector to be recognised. Without this, it is difficult to accept the values of impacts claimed, and it will be impossible to support effectively the desired growth and development. Furthermore, there are important regional trends that need examination and relating to emerging regional agendas. These may be through regional assemblies, National Parliaments, Regional development Agencies, and the ODPM.

Countryside Recreation and Sport & Government and the Economy

The issues raised in this review are highly relevant to some Government Departments and Agencies, and quite important to others: Defra and associated agencies; ODPM; Other major government departments such as Department for Culture, Media & Sport; Department for Education & Employment.

Countryside Recreation and Sport & Young People and the Economy

Declines in countryside recreation and sport participation in schools and amongst younger people will adversely affect voluntary clubs and organisations. They would also affect long-term participation levels, and hence economic impacts. This is increasingly a concern for organisations with an aging membership base.

If economic impacts are to be maintained or increased then this sector must grow, beginning with schools and young people. The basis to introduce young people to countryside recreation and sports, to develop their interest, confidence and skills, is established. Best practice is demonstrated by CCPR members such as the Duke of Edinburgh Award Scheme; with the Wildlife Trusts' Watch Groups and RSPB Youth groups other good examples.

There are serious problems though. In an increasingly litigation conscious society the provision of outdoor education or adventure experience is a headache for schools and other providers alike. Insurance, training and certification requirements, and risk assessments all increase over time. With local authority support services often reduced as discussed earlier, the burden falls on individual schools, clubs, and voluntary organisations.

Another difficulty over the last decade or so has been the imposition of the National Curriculum; seen as a block to innovative environmental experience. Perhaps here the CCPR network can help demonstrate to schools and teachers how the environment can deliver key Curriculum outputs.

Countryside Recreation and Sport & Health and the Economy

Research indicates that countryside recreation and sport activities are an important contributor to public health and emotional well-being, and reduce spending on healthcare. Fitness levels of the population are falling and obesity is rising. Taking part in countryside recreation and sport can help to reverse these trends, and benefit the economy. There is an absence of thorough and wide-ranging studies to reinforce ideas that are generally taken as commonsense truths. This is an important area and can be pivotal to the future of this sector engaging with a wider community audience. Sport England and CCPR are key organisations to take this agenda forward.

Countryside Recreation and Sport & Social Exclusion and the Economy

Participation in countryside recreation and sport activities can help children and other young people acquire important life skills and provide a focus and purpose to life, and decrease alienation. It is especially important to open up opportunities for countryside recreation and sport activities for young people in deprived inner city areas. Not only does this help the young people, but it benefits the rural economy too.

There is also a latent demand for many of these activities amongst black and ethnic minority groups (Judy Ling Wong, of BEN [the Black Environment Network], pers. comm. 2005). Discussion with Judy indicates that not only should we be concerned to develop opportunities for countryside recreation and sport activities for minority groups because of the inherent benefits, but also in considering the economic aspects, the so-called '*black pound*' is a massive potential that is presently overlooked.

A Broader Approach to countryside recreation and sports and associated economic regeneration

Recommendations:

- 1. The establishment of a working group facilitated by CCPR and Sport England with the governing bodies of their members. This will consider methodologies and the gathering of data via Standard Information Returns.***
- 2. Capacity building within the sector and the constituent bodies to achieve this.***
- 3. To lobby for Strategic and Policy recognition at appropriate levels, of the importance of this industry and the need to support it.***

It is important that Government and other key strategic players recognise both the importance and the potential of countryside recreation and sports for local economies.

- 4. Recognition of the benefits of 'growing' the sector to benefit rural and other economies.***

There is a need for strategic and policy recognition by Government and policy makers in terms of growing this sector to support the rural economy.

- 5. Moves to more fully embed these issues in regional and agency strategies on countryside, rural, and planning issues.***

Development of countryside recreation and sports needs to be more effectively embedded in regional, and in particular in rural policy and strategy.

6. *Positive action to promote the importance of the industry not just because it is important, fun, healthy etc., but also because this could be a fantastic career.*

Growing the sector is important, and there is an urgent need to promote countryside and environmental issues not just because they are inherently worthwhile, but to young people as areas for a potential career.

7. *Action at appropriate levels to profile these benefits to key decision-makers, from local government upwards.*

A key part of this action is the development of effective advocacy to raise the profile of the sector with key organisations and individuals. Importantly this is both within the sector itself as well as to politicians, funding bodies *etc.*

8. *Economic impact monitoring: The development of Best Practice Guidance on Economic Assessment and Monitoring for Countryside Recreation and Sports organisations.*

It is essential that assessment and monitoring of this sector is more effective and is carried out in such a way that it fits national guidelines and criteria. This will allow better inter- and intra-sectoral evaluation. A framework for this is proposed.

9. *Increasing the benefits: Production of Best Practice Guidelines for organisations and operators in order to help them to maximise their sustainability and local economic impacts.*

As described in the review there are ways to maximise the economic impacts of countryside recreation and sports, simply by moving towards better practice. It is suggested that best practice guidance be produced specifically for stakeholders and players in this sector, and that the necessary training and advocacy is developed in parallel. This should be delivered in partnership with other interested organisations.

10. *A co-ordinated database on organisations and activities, and their economic impacts in order to more effectively profile the sector.*

This review has noted the difficulties in gathering basic information and data about the participation in countryside recreation and sports, and hence about their economic impacts. It is therefore essential that an effective database is developed to gather and hold key information on organisations and their activities. Given cooperation of the stakeholders this need not be a huge task. This should also then identify the existing sources of key economic and other monitoring pertinent to the sector, identify gaps and make recommendations as to how these omissions should be addressed.

This database should then be the basis of a period forecast and review (such as already produced for the Leisure Industries).

11. Further work to establish more fully the health related benefits (including economic) in order to ensure the sector is fully recognised within this emerging agenda.

A medium-term recommendation is that the sector should work with others in the sports and environment sectors, to more fully establish the case for therapeutic (and associated economic) benefits of their activities. Whilst this is not easy to prove the basic concept is 'commonsense' and the implications if harnessed effectively, are massive.

Action Points

Along with the recommendations above, there are several key action Points that will help move the sector in the right direction for both recognition and for improved performance.

1. Advocacy Statement and publicity

From this review, there should be a promotional leaflet to highlight key issues, facts, and challenges

2. Establishment of a Strategy Working Group of Key Stakeholders from the Wider Industry

Co-operative working, with genuine commitment to long-term strategic development and growth within the wider countryside recreation and sport industry and its component sectors should be established. A team of stakeholders should be drawn either from across the narrower sector or ideally the wider industry. This team would scope the potential strategic issues and players across the industry, establish the principles of co-operation and likely barriers, and establish the process and resources for developing an agreed strategy and ten-year plan.

There is a need to develop a national strategy and ten-year plan for countryside recreation and sport. This should be supported local level implementation plans and a nest of plans for individual sectors of the industry. The National Plan will need to establish who will do what and when for the industry and its component sectors. It will be worthwhile at an early stage identifying perhaps five key strategic goals. These might include short-term easy 'wins' and longer-term goals. There should be clear time-lines for achievement combined with effective monitoring and review. The Strategy will identify key, specific, strategic issues (both internal and external to the industry) to free the potential of the industry to maximise positive externalities and minimise negative ones. It will identify key opportunities to increase engagement (participation / consumption) in the industry by the general public and so increase revenue streams. It will seek to maximise the above through new recruitment but also by increasing the activity by those currently involved.

The Strategy and Plan should be underpinned by guidance on best practice. An early task will be to establish good practice for the collection, collation, and analysis the key economic and participation data as noted lacking by this review.

The core working group will need to identify the means necessary to implement the strategic plan.

3. Workshop and Conference on the Economic Impacts of Countryside Recreation and Sports

An important finding has been the lack of recognition of this sector and hence of its impacts. This is both within the sector and also beyond it. It is therefore essential that the more effective definition and wider participation are addressed as a matter of priority. The easiest way to do this will be to draw together key players to a stakeholder workshop and then to promote the approaches and findings to a wider audience through a major conference. This should be along with presentations of issues and findings through the existing and established meetings and events as held by CCPR *etc.*

4. Primary Research on the Economic Impacts of Countryside Recreation and Sports

There is an urgent need for basis primary research into the economic performance and impacts of this sector. This is a study that should be funded perhaps by Sport England and CCPR.

Section 5

ECONOMIC IMPACTS SUMMARY

PART 1 Tourism Based Research and Data

SOURCE	INCOME	JOB	ADDITIONAL INFORMATION / COMMENT
<i>[N.B. Full references are given in Section 4]</i>			
Allery Scotts (1999) The Economic Impact of Touring Caravans and Camping on the Local Community	Average spend per pitch per night: £63.25 - £73.47	Estimation of 10 people employed directly & indirectly per site. No figures given on total number employed. Note this is a SW study not a national study.	Figures apply only to parts of the South West.
Baker(1997) Development of a model system for touristic hunting allocation	Trophy or sport hunting provides higher revenues than non-consumptive types of nature-based tourism.	Increased economic impact = more related employment.	Raises methodological issues relevant to the measurement of the economic impact of countryside recreation
Beard, Egan, & Rotherham (2000) The changing role of outdoor leisure: a critical review of countryside tourism	Tourism generates 11% of global GDP. May be particularly important in some small economies e.g. tourism accounts for 85% of all economic activity in the Scilly Isles, and much of this is countryside recreation based.		Raises methodological issues relevant to the measurement of the economic impact of countryside recreation
British Marine Federation (2004) UK Leisure Marine Industry Bulletin 2003 - 4	Total revenue 2003 - £1837.5 million	Total employment 2003 (in Britain - England, Scotland, Wales - & 'other British' [only 2%]) - 30,094	An activity (sailing) that could be included in countryside recreation

Christie & Matthews (2003) The Economic and Social Value of Walking in England	Income generated from countryside recreational walking-related expenditure between £1.473 billion & £2.763 billion.	Countryside recreational walking supports between 180,559 & 245,560 FTE jobs.	
Cooper & Rayment (2000) Leighton Moss RSPB Nature Reserve and the Local Economy	Leighton Moss RSPB Nature Reserve & nearby sites attract annual countryside recreational visitor expenditure of at least £0.95 million per year into the local economy within 20 miles of the Reserve.		Countryside recreational visitors estimated to increase, so there should be a corresponding increase in the local economic impact of the reserve.
Cope, Downward, & Lumsdon (2004) The North Sea Cycle Route: Economic Impacts of Linear Trails	Average spending by countryside recreational cyclists higher the longer the duration of the trip.		Few data available re spending & expenditure patterns on linear visitor attractions - study ongoing.
Countryside Agency (2004) Summary of the 2002-3 Leisure Day Visits Survey for England, Wales and Scotland	Total expenditure on leisure day visits - £71.1 billion, around ¼ being to countryside areas, giving countryside spend of around £17 billion per year.		[In 1998 24% of all leisure trips were to the countryside, with hikers and ramblers making up 15% of all tourists in England]. National survey of day visitors that includes countryside recreation but does identify it specifically.
Countryside Agency (2003) Rural Economies. Stepping Stones to Healthier Futures	Tourism attracted spend of £4 billion in England in 2000		Sets scene for debate on rural regeneration and therefore the potential role of countryside recreation.

Countryside Agency & English Tourism Council (2001) Working for the Countryside -A strategy for rural tourism in England 2001 - 2005	Rural tourism much based on countryside recreation and sports is worth £12 billion per year.	Rural tourism much based on countryside recreation and sports supports 380,000 jobs.	
Countryside Agency (2000) The Economic Impact of Recreation and Tourism in the English Countryside 1998	Total spending by all visitors to the countryside estimated at £11.5 billion in 1998.	Total employment supported by visitor activity in the countryside is estimated to be 340,000 jobs.	The only national study on the economic impact of day visitors to the countryside including countryside recreation participants.
Countryside Alliance (undated) Our Countryside Matters: The contribution of country pursuits to rural sustainability - contributing to the economy		An estimated 60,000 people are directly employed in traditional country pursuits and field sports.	
DETR (2001) Regeneration through sport, culture and tourism	Leisure industry brings in over £20 billion per annum in foreign exchange. Tourism - turnover £53 billion per annum. Creative industries - turnover £60 billion per annum. Sports accounts for £13 billion per annum of consumer expenditure.	Leisure industry provides over 10% of total employment in the UK. Tourism employs 1.75 million in the UK. Creative industries employ more than 1.4 million in the UK. Sport-related employment over 435,000 in the UK.	Raises the general issues as regards recreational activities economic contribution to regeneration.
Dickie (1995) Working with nature in Britain: Case studies of		In 1995, RSPB stated that nature conservation sector accounted for more	This helps set the scene to link nature

nature conservation and local economies		than 10,000 FTE jobs.	conservation to countryside recreation through wildlife leisure and tourism. This was a start but significantly under-states the case.
ECOTEC Research & Consultancy Ltd (2003) The Economic Impact of the Restoration of the Kennet & Avon Canal	2002 - tourism & leisure industry, based significantly on countryside recreational activities, along the canal was worth £25 - 30 million per annum.	Tourism & leisure economy directly supported 740 - 860 FTE jobs & 965 - 1,120 FTEs once indirect & induced effects taken into account.	Both figures represent a growth since 1995.
Eden Project (2003) 'Eden Effect' sets New Seasonal Trends			Eden Project based significantly on countryside recreational activities, extending the traditional season in Cornwall. Commitment to local sourcing has had a knock-on effect across all sectors of local industry.

<p>Environment Agency (2004) Our Nations' Fisheries The migratory and freshwater fisheries of England and Wales - a snapshot</p>	<p>Angling, a countryside recreational activity and field sport, expenditure estimated at over £3 billion per annum.</p> <p>Study of River Teifi in S. Wales - contribution made by salmon & sea trout anglers to the local economy about £1 million per year, with further £50,000 in rest of S W Wales.</p>	<p>Much of this supports employment in rural areas where job opportunities limited.</p> <p>Estimated that this funds 70 FTE jobs, principally in hotel & accommodation sector.</p> <p>The British Trout Association estimated that trout angling employs over 700 in the UK</p>	<p>Salmon & sea trout angling are in steady decline.</p>
<p>GHK (2003) The Environmental Economy in the Rural Areas of South West England - A Briefing Paper</p>			<p>Paper aims to set out framework for programming development at a regional scale that creates jobs & economies that draw from, but help sustain, natural environment.</p> <p>Potential for economic development of tourism & tourism marketing likely to be substantial.</p> <p>A useful benchmark for comparing countryside recreation studies.</p>
<p>Hill <i>et al.</i> (2003) Forests' Role in Tourism: Phase 2</p>	<p>Tourism day visits to forests based significantly on countryside recreational activities, contribute an estimated £2.3 billion to the British economy per annum</p>		
<p>Hilton (2004) Anglers boost tourism with annual spend of over £3 million</p>			<p>A summary of the 2004 fisheries report, with no additional data</p>

<p>Historic Environment Review Steering Group (2003) The Economic Value of the Historic Environment</p>	<p>Domestic tourism generates £61 million in Britain.</p> <p>Estimated minimum total of £320 - £340 million generated as a result of visits to historic attractions in 2002, or an average of £333,000 each.</p>	<p>Provides employment for 7.4% of people in Britain.</p>	<p>Provides comparable data and a methodological benchmark.</p>
<p>Jasper with Geoff Broom Associates (2002) The Economic Impact of the Eden Project</p>	<p>Total spending associated with trips involving a trip to Eden based significantly on countryside recreational activities, during the period (6 months) - £360 million - £16 million on site & estimated £344.5 million off.</p>	<p>652 employed directly, 247 indirectly based significantly on countryside recreational activities.</p>	
<p>Land Use Consultants & Lumsdon (2004) Getting Back on Track Regenerating rural life Informal Recreation and the West Midlands Economy</p>	<p>2003 - economic contribution to the region by informal recreation around £420 million, plus around £80 million from casual horse riding.</p> <p>£60,000 towards developing the Mortimer Trail & £10,000 on management generated return in excess of £183,000 per annum.</p>	<p>Between 15% & 30% of trade in local tourism businesses generated by the Mortimer Trail.</p>	<p>A study measuring the economic impact of specific countryside activities to the local economy.</p>
<p>Liston-Heyes & Liston-Heyes (1999) Recreational benefits from the Dartmoor National Park</p>			<p>This article looks in detail at the use of methodologies used in countryside recreation impact studies.</p>
<p>Midmore (2000) The Economic Value of Walking in Rural Wales</p>	<p>Conservative estimate of value of countryside recreational walking in Wales - £55 million.</p> <p>Addition of mountaineering - further £22 million.</p>	<p>Conservative estimate of 3,000 jobs.</p> <p>Addition of mountaineering - extra 1,250 jobs.</p>	<p>Potential of countryside recreational walking as a means of economic regeneration underexploited at present.</p>

Mintel (2003) Camping and Caravanning in the UK	'Stagnant' domestic market of £2 million		Important and high spend part of countryside recreation.
Mintel (2004) Days Out	2002 - revenue increased from 2001 by 11% to £2.3 billion.		An increase in UK tourism is forecast. Background information on market trends including countryside recreation
National Trust (2001) Valuing our Environment: The economic impact of the Environment of Wales	Estimated £821 m spent 1999 on day & longer trips whose choice of location was associated with the environment.	Out of 111,657 jobs associated with the Welsh environment, 23,600 are estimated to stem from tourism & leisure, primarily countryside recreation.	
Nautilus Consultants Ltd (2000) Study into Inland and Sea Fisheries in Wales	Recreational fishing in Wales - approximate turnover £76.3 million. Sea angling - estimated gross contribution of over £28 million to coastal economy of Wales.	Generation of around 732 jobs from this aspect of countryside recreation and field sports.	
Newidiem (2004) The Active Economy The value of adventurous outdoor activities to North West Wales	Estimated countryside recreation and sports contribution of over £140 million per annum to North West Wales economy; of which £60 million in the Snowdonia National Park.	Creation of over 8,400 jobs across N W Wales, both directly & indirectly, almost 5,500 of which in Snowdonia National Park - equates to almost 6% of all employment across N W Wales.	A usual regional case study of the impact of a major component of countryside recreation and sports.
Pricewaterhouse Coopers LLP (2004) Valuing our Environment: The economic impact of the National Trust in Northern Ireland	National Trust, N. Ireland - turnover just under £7.4 million (2002), over 60% drawn from outside N Ireland, thus representing a net benefit to the local economy. Total local spending by NT in N. Ireland amounts to £4.9 million - £6.3 million. Many of the visitors to National Trust properties are countryside recreation	Total employment by the National Trust, both directly & indirectly, approx 650. Trust employs approx 403 staff in N Ireland.	Raises methodological issues relevant to the measurement of the economic impact of countryside recreation

	participants.		
Ramblers' Association (2003) Walking makes money	<p>Approx £6.12 billion spent by countryside recreational walkers on trips in England, generating income in excess of £2 billion.</p> <p>Scotland - average spend of £6.21 per party of walkers, a total of around £900 million.</p> <p>Walking generates estimated £438 million from visitors to Scotland.</p> <p>Wales - walking-related spending £132 million.</p> <p>Sales of outdoor clothing rose from £25 million (1980) to over £1 billion (2000).</p> <p>SW Coast Path generates £300 million per annum.</p> <p>Annual cost of maintenance only around £500,000.</p>	<p>Countryside recreational walking supports up to 245,000 full-time jobs.</p> <p>Countryside recreational walking generates 4,800 full-time jobs in Wales.</p> <p>Countryside recreational walking on the S W Coast Path supports 7,500 jobs.</p>	<p>Popular countryside recreational walking routes are major assets to the tourist industry.</p> <p>Countryside recreational walking could bring vast savings to the nation's health bill as it would help tackle the problem of obesity.</p>
Rayment & Dickie (2001) Conservation Works.....for local economies in the UK	Countryside recreational visitors spend an estimated total of £12 million in local economies each year as a result of visiting RSPB Bird reserves.	Countryside recreational spending at RSPB reserves estimated to support more than 300 FTE jobs in local economies; direct employment on reserves amounts to another 200 FTE jobs.	Report catalogues a number of case studies of nature conservation supporting the economy e.g. wildlife tourism in Orkney and Red Kites & tourism on the Black Isle.
Rayment <i>et al.</i> (2000) Valuing Norfolk's Coast. The Economic Benefits of Environmental & Wildlife Tourism	Countryside recreational visitor spending in study area an estimated £122 million.	Estimated 3,266 actual or 2,325 FTE jobs supported by visitor spending in the study area.	

<p>Regional Partners in the North East (2001) Valuing the Environment of the North East of England</p>	<p>Hadrian's Wall National Trail will potentially generate £6.94 million in visitor spending</p>	<p>Tourism employment based specifically on a high quality environment estimated at 27,000.</p> <p>Tourism as a whole - approx 67,000 FTE posts.</p> <p>Hadrian's Wall National Trail will potentially support 80 rural jobs</p>	<p>Raises methodological issues relevant to the measurement of the economic impact of countryside recreation</p>
<p>Scott Wilson Resource Consultants & Scottish Agricultural College (2002) Inventory of Grouse Shooting Activities in the Scottish Borders</p>	<p>In 'best' years positive net revenues reported by providers of commercial grouse shooting in the Lammermuirs averaged £143 per gun day & £7.70 per hectare</p>	<p>Employment 68 FTE jobs (1999), represented by 750 jobs (mostly seasonal & part-time)</p>	<p>Raises methodological issues relevant to the measurement of the economic impact of countryside recreation</p>
<p>Scott Wilson Resource Consultants & Scottish Agricultural College (2002) The Countryside Management Industry in the Scottish Borders: Sustainability and the Pursuit of New Jobs and Resources Part 2</p>	<p>Indirect expenditure generated by direct spend of shooting providers and participants in 1998/99 estimated £1.1million - £1.2million.</p>	<p>Employment generated by goods & services purchased by shooting providers & participants through local trade & professional organisations estimated at 325 - 510 jobs, representing additional 65 - 102 FTEs. Additional 16 - 17 FTEs due to indirect expenditure.</p>	<p>Raises methodological issues relevant to the measurement of the economic impact of countryside recreation</p>

<p>Shiel <i>et al.</i> (2002) RSPB Reserves and Local Economies</p>	<p>Spending by RSPB & countryside recreational visitors to reserves - approx £19 million.</p> <p>Conservation organisations spend more than £500 million a year in England & Wales.</p> <p>Nature conservation as an important part of countryside recreation helps support a significant proportion of rural tourism market, worth £12 billion per year, in England.</p>	<p>RSPB reserves support more than 1,000 FTE jobs in UK.</p> <p>Acquisition of new reserves forecast to employ 70 new staff.</p> <p>New reserves forecast to support 250 FTE jobs in local & regional economies by 2007.</p> <p>There are more than 18,000 FTE jobs in nature & landscape in the UK.</p>	
<p>Spurgeon <i>et al.</i> (2002) Economic Evaluation of Inland Fisheries</p>	<p>Inland fisheries of England & Wales considered valuable economic assets with a combined value of £3,032 million.</p>		<p>Coarse fisheries the most valuable category of fishery type</p>
<p>SQW Ltd & System Three (2001) Valuing our Environment: The economic benefit of the National Trust's work in Cumbria</p>		<p>2,700 - 4,600 FTE jobs in Cumbria supported by the NT, with a further 30 indirect jobs estimated, mostly related to countryside recreation.</p>	
<p>The Borders Foundation for Rural Sustainability - Untitled Document (2002)</p>	<p>Comprehensive audit in 2002 into economic & environmental contribution of land-based communities revealed 'hidden' rural economy, worth £41 million.</p>	<p>Audit (2002) revealed 'hidden' rural economy worth 4,000 jobs.</p>	<p>Raises methodological issues relevant to the measurement of the economic impact of countryside recreation</p>
<p>University of Brighton (2004) Water-Based Sport and Recreation: the facts</p>			<p>Downturn in water-based sport & recreation predicted, but informal canoeing, dinghy sailing & rowing said to be on the increase.</p> <p>Currently a lack of</p>

			information about water-based sport & recreation.
Willis <i>et al.</i> (2003) The Social and Environmental Benefits of Forests in Great Britain	Marginal non-forestry benefits of woodland estimated at around £1.66 to £2.75 per recreational visit. Annual value of environmental benefit of recreation estimated at £392.65 million per & the capitalised environmental benefit per annum at £11,218 million (2002 figures).		

ECONOMIC IMPACTS SUMMARY

PART 2 Sports Based Research and Data

SOURCE	INCOME	JOBS	ADDITIONAL INFORMATION / COMMENT
Cambridge Econometrics (2002) Evaluating the Regional Economic Impact of Sport The Proposed Model Framework			Project aims to develop a standard economic model which will apply to all Sport England's regions. Provides a methodological benchmark for countryside recreation studies.
Defra & The British Horse Industry Confederation (2004) <i>A Report of Research on the Horse Industry in Great Britain</i>	The research showed that the horse industry's gross output is approximately £3.4 billion, but further research would be needed to give a more reliable figure.	The horse industry employs 50,000 people directly. It employs an additional 100,000-200,000 people indirectly; 2.4 million people ride; 5 million people have an active interest in the horse industry 11 million people have some interest in the industry, including watching horse racing on television there are between	The research concludes that current trends, especially the growth in the leisure economy, suggest the potential for real growth for the industry.

		60,000 and just under one million horses.	<p>The research observes that the industry is diverse, with communication between the various parts not always very effective. The report suggests five specific issues as key to the industry's growth.</p> <ol style="list-style-type: none"> 1. The wider promotion of the British horse industry both nationally and internationally; 2. The promotion of British thoroughbreds and the development and of a British sport horse, including improving the sport horse breeding sector's organisation and overseas marketing; 3. The development of 'joined up' thinking and best practice in the promotion of leisure riding and sporting excellence, including linking the grass roots and the top tier and promoting riding schools as community assets;
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			<p>4. The promotion of UK-based horse tourism, including providing a national framework for equestrian tourism and promoting best practice</p> <p>5. The continued improvement of off-road riding opportunities, including uniting and strengthening the industry's efforts behind a lead organisation that promotes its needs, publicising them nationally and locally, and working with other groups such as cyclists.</p>
<p>DETR (2001) Regeneration through sport, culture and tourism</p>	<p>Leisure industry brings in over £20 billion per annum in foreign exchange.</p> <p>Tourism - turnover £53 billion per annum.</p> <p>Creative industries - turnover £60 billion per annum.</p> <p>Sports accounts for £13 billion per annum of consumer expenditure.</p>	<p>Leisure industry provides over 10% of total employment in the UK</p> <p>Tourism employs 1.75 million in the UK</p> <p>Creative industries employ more than 1.4 million in the UK</p> <p>Sport-related employment over 435,000 in the UK</p>	<p>Raises methodological issues relevant to the measurement of the economic impact of countryside recreation</p>

Leisure Industries Research Centre (2003) Sports Volunteering in England 2002	Value of the hours of sports volunteering in England estimated at £14,139,832,000, based on average hourly earnings of all industries in 2002 of £11.69.	5,821,400 volunteers contributed 1,209,556,500 hours to sport in England in 2002.	Raises question whether countryside recreational activities should measure the value of volunteers.
Mallabon & Taylor (2002) Paddlesport Review	Average countryside recreational paddler spend per trip (2000): £10 - £15 petrol £10 - £15 food & drink £15+ accommodation Total £2,799,833 spent by British Canoe Union on boats (2000). Total £3,564,368 spent on paddlesport related kit (2000).		Example of countryside recreation and sports activity with a major and quantifiable economic impact.
Mintel (2004) Sporting Activities in the Great Outdoors - UK			Outdoor sports comprise a significant sector of the overall sports market, both in participation & in economic terms.
Mintel (2003) Extreme Sports - UK			Interest in extreme sports has increased in recent years & the future looks very positive.
Mintel (2003) Camping and Caravanning in the UK	'Stagnant' domestic market of £2 million		Important and high spend part of countryside recreation.

Mintel (2003) The Sports Market - UK			<p>This report looks at participation in sport with levels forecast to remain static at best.</p> <p>Market trends which include some countryside recreational activities.</p>
Mintel (2003) Golf - UK	High <i>per capita</i> spending attracts dozens of manufacturers		<p>Example of high spend and high profile countryside sport. Steady growth is anticipated; but there are now concerns about stagnation.</p>
Mintel (2004) Sports Clothing	<p>2003 - estimated £4,480 million spent on sports clothing.</p> <p>2003 - estimated <i>per capita</i> spend of £72.</p>		<p>Clothing claims nearly half of total sports goods spending.</p> <p>Countryside activities are a major part of this market.</p>
Newidiem (2004) The Active Economy The value of adventurous outdoor activities to North West Wales	Estimated countryside recreation and sports contribution of over £140 million per annum to N W Wales economy, of which £60 million in the Snowdonia National Park.	Creation of over 8,400 jobs across N W Wales, both directly & indirectly, almost 5,500 of which in Snowdonia National Park - equates to almost 6% of all employment across N W Wales.	A useful regional case study of the impact of a major component of countryside recreation and sports.
Sport England (2004) The Framework for Sport in England Making England an active and successful sporting nation: A vision for 2020	<p>English households spent nearly £11.5 billion on sport-related goods & activities in 2000.</p> <p>Spending by commercial companies on sports sponsorship has grown to a figure well in excess of £300 million pounds a year.</p>	Employment in sport-related activities increased from around 1.5% of the national workforce to just under 2% in between 1998 & 2000, with 400,000 people employed in sport.	Countryside activities are a major part of this market.

	<p>Sporting events are significant income generators - Commonwealth Games 2002 catalyst for regeneration of East Manchester, with inward investment of £36 billion.</p> <p>Company-based fitness & exercise initiatives - one company estimated savings on just 50 of those participating to be £44,500 per annum.</p>	<p>Commonwealth Games - 6,500 jobs in East Manchester.</p>	
<p>Sport England (1999) Best Value through sport the value of sport</p>	<p>Nationally, consumer expenditure on sport in 1995 estimated at £10.4 billion or 2.33% of total expenditure</p> <p>Real consumer expenditure on sport in UK grew by 30% between 1985 & 1995.</p> <p>The value-added to UK economy by sport-related economic activity estimated at £9.8 billion, or 1.6% of GDP.</p> <p>Sport has significant economic impact regionally & locally - Northern Region spent an estimated £613 million on sport & sport-related activities in 1992.</p>	<p>Employment in sport in UK 415,000 in 1995, 1.61% of total employment.</p> <p>Total employment in sport in region of 19,540 - 22,400 in 1992.</p>	<p>Countryside activities are a major part of this market.</p>
<p>University of Brighton (2004) Water-Based Sport and Recreation: the facts</p>			<p>Downturn in water-based sport & recreation predicted, but informal canoeing, dinghy sailing & rowing said to be on the increase.</p> <p>Currently a lack of information about water-based sport & recreation.</p>

ECONOMIC IMPACTS SUMMARY

PART 3 Field Sports and Countryside Pursuits (including equestrian) Based Research and Data

SOURCE	INCOME	JOBS	ADDITIONAL INFORMATION / COMMENT
Baker (1997) Development of a model system for touristic hunting allocation	Trophy or sport hunting provides higher revenues than non-consumptive types of nature-based tourism.	Increased economic impact = more related employment.	Raises methodological issues relevant to the measurement of the economic impact of countryside recreation
British Horse Society (2005) Some Equestrian Statistics	Around £2.5 billion spent on horses & countryside recreational riding.	50,000 direct 200,000 indirect	
Burns (2000) Inquiry into Hunting with Dogs in England and Wales		Estimated 6,000 - 8,000 jobs dependant on hunting.	<p>Economic effects not substantial, except on the 'horse economy', local communities dependant on hunting & businesses on the borderline of viability.</p> <p>The most detailed study available on countryside recreation and the group of studies dealing with this issue clearly raise the subjective nature of these types of studies.</p>

Countryside Agency & English Tourism Council (2001) Working for the Countryside -A strategy for rural tourism in England 2001 - 2005	Rural tourism much based on countryside recreation and sports is worth £12 billion per year.	Rural tourism much based on countryside recreation and sports supports 380,000 jobs.	
Countryside Alliance (undated) Our Countryside Matters: The contribution of country pursuits to rural sustainability - contributing to the economy		An estimated 60,000 people are directly employed in traditional country pursuits and field sports.	
Countryside Alliance (2002) Brief on Hunting with Dogs		British Equestrian Trades Association state horse industry is responsible for the majority of jobs dependant on hunting.	Based on the Burns Enquiry of 2000. The group of studies dealing with this issue clearly raise the subjective nature of these methodologies.
Environment Agency (2004) Our Nations' Fisheries The migratory and freshwater fisheries of England and Wales - a snapshot	Angling, a countryside recreational activity and field sport, expenditure estimated at over £3 billion per annum. Study of River Teifi in S Wales - contribution made by salmon & sea trout anglers to the local economy about £1 million per year, with further £50,000 in rest of S W Wales.	Much of this supports employment in rural areas where job opportunities limited. Estimated that this funds 70 FTE jobs, principally in hotel & accommodation sector. Estimated that trout angling employs over 700 in the UK	Salmon & sea trout angling are in steady decline.
Hill <i>et al.</i> (2003) Forests' Role in Tourism: Phase 2	Tourism day visits to forests based significantly on countryside recreational activities, contribute an estimated £2.3 billion to the British economy per annum		
Hilton (2004) Anglers boost tourism with annual spend of over £3 million			A summary of the 2004 fisheries report, with no additional data

Macaulay Land Use Research Institute (2002) Economic Impacts of a Ban on Hunting with Dogs in Scotland	Reduction of expenditure by Scottish hill packs of £46,000 per annum. Impacts on gamekeeper employment indicated a reduction of £1.97 m per year in expenditure entering the Scottish economy.	An estimated 160 - 172 FTE jobs would be lost by a long-term ban on hunting. Loss of 10 FTE jobs. Estimated loss of possibly 114 jobs.	The group of studies dealing with this issue clearly raise the subjective nature of these methodologies
Mintel (2004) Sports Clothing	2003 - estimated £4,480 million spent on sports clothing. 2003 - estimated <i>per capita</i> spend of £72.		Clothing claims nearly half of total sports goods spending. Countryside recreation is a major part of this market.
Nautilus Consultants Ltd (2000) Study into Inland and Sea Fisheries in Wales	Recreational fishing in Wales - approximate turnover £76.3 million. Sea angling - estimated gross contribution of over £28 million to coastal economy of Wales.	Generation of around 732 jobs from this aspect of countryside recreation and field sports.	
Rayment <i>et al.</i> (2000) Valuing Norfolk's Coast. The Economic Benefits of Environmental & Wildlife Tourism	Countryside recreational visitor spending in study area an estimated £122 million.	Estimated 3,266 actual or 2,325 FTE jobs supported by visitor spending in the study area.	
Scott Wilson Resource Consultants & Scottish Agricultural College (2002) Inventory of Grouse Shooting Activities in the Scottish Borders	In 'best' years positive net revenues reported by providers of commercial grouse shooting in the Lammermuirs averaged £143 per gun day & £7.70 per hectare	Employment 68 FTE jobs (1999), represented by 750 jobs (mostly seasonal & part-time)	
Scott Wilson Resource Consultants & Scottish The Countryside Management Industry in the Scottish Borders: Sustainability and the Pursuit of New Jobs and Resources Part 2	Indirect expenditure generated by direct spend of shooting providers and participants in 1998/99 estimated £1.1million - £1.2million.	Employment generated by goods & services purchased by shooting providers & participants through local trade & professional organisations estimated at 325 - 510 jobs, representing additional 65 - 102 FTEs. Additional 16 - 17 FTEs due to indirect expenditure.	Raises methodological issues relevant to the measurement of the economic impact of countryside recreation

Spurgeon <i>et al.</i> (2002) Economic Evaluation of Inland Fisheries	Inland fisheries of England & Wales considered valuable economic assets with a combined value of £3,032 million.		Coarse fisheries the most valuable category of fishery type
The Borders Foundation for Rural Sustainability - Untitled Document (2002)	Comprehensive audit (2002), into economic & environmental contribution of land-based communities revealed 'hidden' rural economy, worth £41 million.	Audit (2002) revealed 'hidden' rural economy worth 4,000 jobs.	Raises methodological issues relevant to the measurement of the economic impact of countryside recreation
White <i>et al.</i> (2004) Economic Impacts of Wild Deer in the East of England	Countryside recreational and sports benefits from deer were estimated to give a total non-consumptive recreational value of deer in East of England estimated at around £343,066 - may be an overestimate.		

ECONOMIC IMPACTS SUMMARY

PART 4 Wildlife, Heritage and Garden Leisure and Tourism Based Research and Data

SOURCE	INCOME	JOBS	ADDITIONAL INFORMATION / COMMENT
Baker (1997) Development of a model system for touristic hunting allocation	Trophy or sport hunting provides higher revenues than non-consumptive types of nature-based tourism.	Increased economic impact = more related employment.	Raises methodological issues relevant to the measurement of the economic impact of countryside recreation

<p>Beard, Egan, & Rotherham, (2000) The changing role of outdoor leisure: a critical review of countryside tourism</p>	<p>Tourism generates 11% of global GDP.</p> <p>May be particularly important in some small economies e.g. tourism accounts for 85% of all economic activity in the Scilly Isles, and much of this is countryside recreation based.</p>		<p>Raises methodological issues relevant to the measurement of the economic impact of countryside recreation</p>
<p>Cooper, & Rayment (2000) Leighton Moss RSPB Nature Reserve and the Local Economy</p>	<p>Leighton Moss RSPB Nature Reserve & nearby sites attract annual countryside recreational visitor expenditure of at least £0.95 million per year into the local economy within 20 miles of the Reserve.</p>		<p>Countryside recreational visitors estimated to increase, so there should be a corresponding increase in the local economic impact of the reserve.</p>
<p>Countryside Agency (2001) Quality of Life Capital Managing environmental, social and economic benefits</p>			<p>The guide describes how to use the Quality of Life Capital approach as a tool for identifying what matters and why. It deals only with the environmental aspects.</p> <p>Raises methodological issues relevant to the measurement of the economic impact of countryside recreation</p>
<p>Countryside Agency (2004) Summary of the 2002-3 Leisure Day Visits Survey for England, Wales and Scotland</p>	<p>Total expenditure on leisure day visits - £71.1 billion, around ¼ being to countryside areas, giving countryside spend of around £17 billion per year.</p>		<p>[In 1998 24% of all leisure trips were to the countryside, with hikers and ramblers making up 15% of all tourists in England].</p>

			Only national study providing data on the visitor spend(including countryside recreation visitors)
Dickie (1995) Working with nature in Britain: Case studies of nature conservation and local economies		In 1995, RSPB stated that nature conservation sector accounted for more than 10,000 FTE jobs.	This helps set the scene to link nature conservation to countryside recreation through wildlife leisure and tourism. This was a start but significantly under-states the case.
Dowson <i>et al.</i> (2000) Valuing the Voluntary and Community Sector in North Yorkshire and York			The voluntary & community sector in N Yorks. & York makes a substantial, but often unrecognised, contribution to the local economy. Methodology might be applicable to attempts to value volunteers in countryside recreation.
Environmental Resources Management (2003) The Economic and Regenerative value of the Natural Environment in the North West			Report identifies 39 ERVNE projects with potential to generate significant economic & regeneration outcomes, but no guarantee of funding. Raises methodological issues relevant to the measurement of the economic impact of

			countryside recreation
Gaskin (1999) Valuing volunteers in Europe: a comparative study of the Volunteer Investment and Value Audit			<p>Valuing volunteer time is difficult, but in general they are cost-effective in terms of the payback on expenditure.</p> <p>Methodology might be applicable to attempts to value volunteers in countryside recreation.</p>
GHK (2003) The Environmental Economy in the Rural Areas of South West England - A Briefing Paper			<p>Paper aims to set out framework for programming development at a regional scale that creates jobs & economies that draw from, but help sustain, natural environment.</p> <p>Potential for economic development of tourism & tourism marketing likely to be substantial.</p> <p>Potentially useful framework that could be adapted for countryside recreation.</p>
Hill <i>et al.</i> (2003) Forests' Role in Tourism: Phase 2	Tourism day visits to forests based significantly on countryside recreational activities, contribute an estimated £2.3 billion to the British economy per annum		

Historic Environment Review Steering Group (2003) The Economic Value of the Historic Environment	Domestic tourism generates £61 million in Britain Estimated minimum total of £320 - £340 million generated as a result of visits to historic attractions in 2002, or an average of £333,000 each.	Provides employment for 7.4% of people in Britain.	Potentially useful framework that could be adapted for countryside recreation.
Jasper with Geoff Broom Associates (2002) The Economic Impact of the Eden Project	Total spending associated with trips involving a trip to Eden based significantly on countryside recreational activities, during the period (6 months) - £360 million - £16 million on site & estimated £344.5 million off.	652 employed directly, 247 indirectly based significantly on countryside recreational activities.	
Kenyon & Nevin (2001) The use of economic and participatory approaches to assess forest development: a case study in the Ettrick Valley	The economic approach suggests project has a minimum value of £450,000, compared with an estimated cost of £350,000.		Much of this article deals with the methodology. Raises methodological issues relevant to the measurement of the economic impact of countryside recreation
National Trust (2001) Valuing our Environment: The economic impact of the Environment of Wales	Estimated £821 m spent 1999 on day & longer trips whose choice of location was associated with the environment.	Out of 111,657 jobs associated with the Welsh environment, 23,600 are estimated to stem from tourism & leisure, primarily countryside recreation.	
Pricewaterhouse Coopers LLP (2004) Valuing our Environment: The economic impact of the National Trust in Northern Ireland	NT, N Ireland - turnover just under £7.4 million (2002), over 60% drawn from outside N Ireland, thus representing a net benefit to the local economy. Total local spending by NT in N Ireland amounts to £4.9 million - £6.3 million. Many of the users would be participating in	Total employment by the National Trust, both directly & indirectly, approx 650. Trust employs approx 403 staff in N Ireland.	Raises methodological issues relevant to the measurement of the economic impact of countryside recreation

	countryside recreation.		
Rayment & Dickie (2001) Conservation Works.....for local economies in the UK	Countryside recreational visitors spend an estimated total of £12 million in local economies each year as a result of visiting RSPB Bird reserves.	Countryside recreational spending at RSPB reserves estimated to support more than 300 FTE jobs in local economies; direct employment on reserves amounts to another 200 FTE jobs.	Report catalogues a number of case studies of nature conservation supporting the economy e.g. wildlife tourism in Orkney and Red Kites & tourism on the Black Isle.
Rayment <i>et al.</i> (2000) Valuing Norfolk's Coast. The Economic Benefits of Environmental & Wildlife	Countryside recreational visitor spending in study area an estimated £122 million.	Estimated 3,266 actual or 2,325 FTE jobs supported by visitor spending in the study area.	
Regional Partners in the North East (2001) Valuing the Environment of the North East of England	Hadrian's Wall National Trail will potentially generate £6.94 million in visitor spending	Tourism employment based specifically on a high level high quality environment estimated at 27,000. Tourism as a whole - approx 67,000 FTE posts. Hadrian's Wall National Trail will potentially support 80 rural jobs	Raises methodological issues relevant to the measurement of the economic impact of countryside recreation

<p>Shiel <i>et al.</i> (2002) RSPB Reserves and Local Economies</p>	<p>Spending by RSPB & reserve countryside recreational visitors - approx £19 million.</p> <p>Conservation organisations spend more than £500 million a year in England & Wales.</p> <p>Nature conservation as an important part of countryside recreation helps support a significant proportion of rural tourism market, worth £12 billion per year, in England.</p>	<p>RSPB reserves support more than 1,000 FTE jobs in UK.</p> <p>Acquisition of new reserves forecast to employ 70 new staff.</p> <p>New reserves forecast to support 250 FTE jobs in local & regional economies by 2007.</p> <p>There are more than 18,000 FTE jobs in nature & landscape in the UK.</p>	
<p>SQW Ltd & System Three (2001) Valuing our Environment: The economic benefit of the National Trust's work in Cumbria</p>		<p>2,700 - 4,600 FTE jobs in Cumbria supported by the NT, with a further 30 indirect jobs estimated, mostly related to countryside recreation.</p>	
<p>White <i>et al.</i> (2004) Economic Impacts of Wild Deer in the East of England</p>	<p>Countryside recreational and sports benefits from deer were estimated to give a total non-consumptive recreational value of deer in East of England estimated at around £343,066 - may be an overestimate.</p>		
<p>Willis <i>et al.</i> (2003) The Social and Environmental Benefits of Forests in Great Britain</p>	<p>Marginal benefits [which means what?? benefits of each additional visit.] of woodland estimated at around £1.66 to £2.75 per recreational visit.</p> <p>Annual value of environmental benefit of recreation estimated at £392.65 million per & the capitalised environmental benefit per annum at £11,218 million (2002 figures). [Need to explain more clearly what these mean] capitalized benefits means that the future benefits over the life of the forest and discounted back to</p>		

present day values to get a capital value of the resource.

Analysis of the Outputs from the Major Studies Reviewed

Issue addressed: STUDY	DIRECT EMPLOYMENT	DIRECT EXEPNDITURE	INDIRECT IMPACT	CONTRIBUTION TO EXCHEQUER	TOTAL VALUE ADDED	MEASURE OF VOLUNTARY VALUE	NATIONAL	REGIONAL	LOCAL
The Sports Economy in Cornwall & the Isles of Scilly	+	+	-	+	+	-	—	—	+
The Economic Impact of Touring Caravans & Camping on the Local Community (1999)	+	+	-	-	-	-	—	+	—
Some Equestrian Statistics	+	+	+	-	-	-	+	—	—
Angling Statistics 2000	+	+	+	-	-	-	+	—	—
Inquiry into Hunting with Dogs E&W (2000)	+	+	+	-	-	-	+	—	—
The Economic & Social Value of Walking In England	+	+	+	-	-	-	+	—	—

	DIRECT EMPLOYMENT	DIRECT EXEPNDITURE	INDIRECT IMPACT	CONTRIBUTION TO EXCHEQUER	TOTAL VALUE ADDED	MEASURE OF VOLUNTARY VALUE	NATIONAL	REGIONAL	LOCAL
Leighton Moss RSPB Nature Reserve & the Local Economy 2000	+	+	+	-	-	-	—	—	+ North West England
The Economic Impact of Recreation & Tourism in the English Countryside 1998	+	+	+	-	-	-	+ England	—	—
Our Countryside Matters	+	-	+	-	-	-	+ England	—	—
Brief on Hunting with Dogs	+	-	+	-	-	-	+	—	—
A Report of Research into the British Horse Industry in Great Britain (2004)	+	+	+	-	-	-	+ Great Britain	—	—

STUDY	DIRECT EMPLOYMENT	DIRECT EXEPNDITURE	INDIRECT IMPACT	CONTRIBUTION TO EXCHEQUER	TOTAL VALUE ADDED	MEASURE OF VOLUNTARY VALUE	NATIONAL	REGIONAL	LOCAL
The Economic Impact of the Restoration of the Kennet & Avon Canal	+	+	+	-	-	-	—	—	+
A Vision for English Golf for the Year 2002	+	+	-	-	-	-	+	—	—
Our Nation's Fisheries	+	+	+	-	-	-	+	—	—
An Assessment of the Economic Impact of Water-Related Recreation & Tourism in the Spey	+	+	+	-	-	-	—	—	+ Scotland
Regenerating Rural Life & Informal Recreation in the West Midlands	+	+	+	-	-	-	—	+ West Midlands England	—

	DIRECT EMPLOYMENT	DIRECT EXEPNDITUR E	INDIREC T IMPACT	CONTRIBUTIO N TO EXCHEQUER	TOTAL VALUE ADDED	MEASURE OF VOLUNTARY VALUE	NATIONA L	REGIONAL	LOCAL
Economic Impacts of a Ban on Hunting in Scotland	+	+	+	-	-	-	+ Scotland	—	—
Paddlesport Review	-	+	-	-	-	-	+	—	—
The Economic Value of Walking in Rural Wales	+	+	+	-	?	-	+ Wales	—	—
Study into Inland & Sea Fisheries in Wales	+	+	+	-	-	-	Wales	—	—
The Value of Adventurous Outdoor Activities to North West Wales	+	+	+	-	-	-	—	North West Wales	+
Walking Makes Money	+	+	+	-	?	-	+	—	—
Conservation Works for Local Economies	+	+	+	-	-	-	—	—	+
Valuing Norfolk's Coast	+	+	+	-	-	-	—	—	+ East England

Inventory of Grouse Shooting in Scotland	+	+	+	-	-	-	+ Scotland	—	—
Inventory of Lowland Game Shooting	+	+	+	-	-	-	—	+ Lowland Scotland	—
RSPB Reserves & Local Economies	+	+	+	-	-	-	+ UK	—	—
The Mountain Bike World Cup	+	+	+	-	+	-	—	—	+

Key Economic Reports

The reports shown here illustrate the range of methodologies and assumptions used by different authors. Whilst providing the best examples of rigorous methodologies used by countryside recreation organisations they also show that certain questions are being unanswered by research on economic impact of countryside recreation (see table above).

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ECOTEC Research and Consulting Ltd (2003) *The Economic Impact of the Restoration of the Kennet & Avon Canal*. Final Report to British Waterways

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Summary Analysis of Organisation Profiles

A small-scale survey was undertaken to gather exemplar information on some key organisations in countryside recreation and sports. All CCPR membership organisations were invited to return details. Others key were sampled directly and through various networks. All those returning the forms are included. The sample was used as a basis for limited economic profiling.

A basic analysis of the figures provided suggests the following as very conservative estimates of minimum levels of activity in countryside recreation and sports based on feedback from a very limited sample:

- **Number of members = 7,200,000**
- **Number of direct employees = 10,500**
- **Number of formal volunteers = 350,000**
- **Number of groups and support groups = 17,000-25,000**
- **Annual economic turnover = £850,000,000**

This confirms the size and importance of this sector of the British economy. However, this is merely a statement of the minimum impact of a part of the sector. These data omit the huge input by local authorities through countryside management services, the entirety of the private sector provision, most of the government agency inputs, and a huge impact of informal countryside recreation and related leisure and tourism. It also makes no attempt to include the indirect effects and the associated retail and hospitality economies. Some of these are addressed elsewhere in the report, but mostly they require primary research and are beyond the scope of this review.

Summary of Key Information on Organisations Sampled

Information:	Key	No. of Members	No. of Employees	No. of Volunteers	No. of Groups	Financial Year Ending	Annual Income	Annual Expenditure	Turnover
Name of Organisation:									
CCPR Water Recreation Division									
Amateur Rowing Association			60		500	2004			£1.3 m
National Association of Fisheries and Angling Consultatives	represents 300,000+ anglers				80				
British Canoe Union (BCU)					469	2003			£3.99 m
British Sub-Aqua Club (BSAC)	39,505	21			Numerous	2003	£2.6 m	£2.5 m	
British Surfing Association									
Royal Yachting Association (RYA)	99,500	88				2004	£11.7 m	£11.5 m	
CCPR Outdoor Pursuits Division									
British Caving Association (BCA)						2004	£35,429	£32,384	
British Hang Gliding & Paragliding Association			9			2004			£854,186
British Horse Society	59,000	84		31,500	(36,000)	2003	£4.9 m	£4.6 m	
British Mountaineering Council (BMC)	61,665				320	2003	£1.5 m	£1.4 m	
British Orienteering Federation	9,000				330	Year not stated			£1 m Budget
British Cycling Federation			127			2003			£5.8 m
Camping and Caravanning Club			356			2003			£24.5 m
Countryside Alliance	350,000	64				2003	£7.8 m	£7.9 m	
Duke of Edinburgh's Award (2003)	137,965 awardees	118		60-70,000	10,701	2004	£7.8 m	£8.8 m	
Institute for Outdoor Learning	605	2		306		Year not stated	£73,000	£73,000	
Long Distance Walkers Association	6,500			262	40	2003	£91,177	£89,939	
Mountain Leader Training UK (MLTUK)	36 (board members)	2				2003	£175,566	£140,379	
Ramblers Association	143,000	53		8-12,000	500	2003	£5.14 m	£4.8 m	
The Scouts Association	461,985					2003	£39.2 m	£37.5 m	
The Open Spaces Society	2,400	5		50		2003	£138,809	£154,655	
The Young Explorers' Trust	30			30	8	2003	£5,000	£6,795	
Youth Hostels Association (YHA)	310,000+		1,200 + 600 Seasonal	2,000		2003	£33.4 m	£32.6 m	
British Association for Shooting and Conservation (BASC)	122,272		90						
Land Access and Recreation Association (LARA)									
Non CCPR Members									
British Deer Society						2003	£475,279	£438,625	
British Waterways		2,255				2004	£197.3 m	£201.1 m	
BTCV	6,415	498		130,000	1,842	2003	£24.6 m	£24 m	

Country Land and Business Association Charitable Trust (CLACT)					2002	£81,383	£83,497
Countryside Agency (CA)		662			2003	£108.8 m	£108.7 m
Forest Research		262			2002	£12.4 m	£11.8 m
The Game Conservancy Trust	22,000	97			2003	£5.1 m	£5.4 m
National Farmers Union (NFU)	136,573	551		300	2003	£22 m	£25 m
National Trust	3.3 m		40,000		2004	£295 m	£295 m
Riding for the Disabled (RDA)			14,000	500	2004	£1.23 m	£940,621
Royal Society for the Protection of Birds (RSPB)	1 m	1,300	9,000+	175	2003	£57.8 m	£47.8 m
The Prince's Trust		800	10,000	743	2003	£46.3 m	£46.5 m
The Royal Society of Wildlife Trusts	592,000	1,731	27,000	47 x 4	2003	£25.7 m	£22.2 m
The Woodland Trust	127,000	218			2003	£16 m	£16 m
Country Land and Business Association (CLA)							
Forestry Commission							
Snowsport England	16,572			205			

Section 6

Research

References and

Glossary

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Glossary

Appraisal	The ex ante analysis of intervention options, the predicted costs and effects of those options, and the value of those options as means for meeting strategic objectives.
Benchmarking	The comparison of inputs, activities, outputs and impacts from an activity against some perceived best practice.
Benefits	The value of goods and services associated with an activity.
Costs	The value of resources used in an activity, This should be measured in terms of the activity's opportunity cost.
Crowding Out	A macroeconomic effect whereby increases in public expenditure give rise to reductions in private expenditure because of adjustments in interest rates or exchange rates.
Deadweight	Activity that would have occurred in the absence of the local economic development activity.
Direct effects	Those effects that flow directly from an activity.
Displacement	The extent to which a economic activity takes resources - land, labour or capital - or market share away from other local activities.
Evaluation	The analysis of the value of an activity after it has been undertaken (<i>ex post</i>) in comparison with other feasible options so as to inform future decisions.
Ex Ante	An analysis of the effects of an activity carried out prior to its being undertaken.
Ex Post	An analysis of the effects of an activity carried out after it is completed.
Exchequer Cost	The cost of an activity in terms of the total increase in government expenditure (and required revenues) associated with it.
External evaluation	An evaluation carried out by some external agency with no involvement with designing or delivering the activity being evaluated.
Externality	A benefit of cost that is not reflected fully in market prices. An example of market failure.
Formative evaluation	Monitoring the operation of an activity to ensure that it is being undertaken as intended, and to identify ways in which its operation and management can be improved. Also called 'process evaluation'.
Gross	The total outputs or impacts of an activity before adjustments are made for non-additional elements such as deadweight and displacement or for multiplier effects.
Impacts	The final consequences of an activity on local economic and social conditions.
Income Multiplier	The multiplier effect of an activity associated with increases in local incomes and consumption of locally produced goods or services.
Indirect effects	Those effects that as private firms and individuals, not directly involved with an activity, respond to its direct effects - examples are displacement and multiplier effects.
Inputs	The resources used in the delivery of an activity.
Leakage	Economic benefits lost to other areas due, for example, to take-up of new jobs by non-locals.
Multiplier Effects	The spillover effects of local economic development interventions on local income and expenditures and on orders to local suppliers.
Normative	Concerned with forming judgements about the value of objects or activities.
Outcomes	The wider long-term impacts of an intervention on local socio-economic conditions.
Outcome evaluation	An investigation of the actual effects of an activity, and the value of those effects to see what the activity actually achieved and whether those achievements justified its cost. It also considers how the activity could have been altered to increase its value added. Also called 'summative evaluation'
Outputs	The direct measurable effects of an activity.

Positive	Concerned with making factual statements about the operation and effects of some activity.
Projects	The individual components or elements of local economic development activities.
Resources	The capital, labour (human) and natural means for producing goods or services.
Sensitivity analysis	An analysis of the implications for predicted policy outputs and impacts of changes in the underlying assumptions on which those predictions are based.
Supply multiplier	The multiplier effect due to increases in purchases from local suppliers associated with an activity.
Sustainability	The creation of lasting or permanent benefits.
Value Added	The excess of benefits over costs associated with a project.