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to promote information exchange relating to countryside recreation, and to foster general debate about relevant trends and issues.

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to spread information to develop best practice through training and professional development in provision for and management of countryside recreation.

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Countryside Recreation is free and is published three times a year. We welcome articles and letters from all readers.

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Editorial

In a countryside recreation context, economic analysis is undertaken for a number of reasons. Sometimes it is for advocacy purposes - to promote the value of a particular resource or project. Often it is to justify investment in a resource or project, whether from the organisation's own budget or from external sources, such as the European structural funds, regional development sources or the National Lottery.

Essentially economic analyses are of two forms. The first is appraisal, whereby future economic impacts are forecast, often to justify projects or programmes of work. The second is evaluation, in which the actual impacts achieved are assessed. These two types of analysis can be used in tandem as part of systematic approach to project management, consisting of design, appraisal, delivery and evaluation elements.

The papers in this issue of the Journal touch on many of the aspects of this process. Two of the papers deal with the policy implications of economic analysis. Rotherham, Doncaster and Egan discuss how economic analysis can be used to impact on policy through emphasising the importance of wildlife tourism to local economies. The results of a wide range of studies in the UK and overseas are brought together to illustrate this. Prentice discusses the implications of the changing economic base in the Highlands and Islands of Scotland - how the region's economy is moving towards one based on recreation and tourism, building upon the Region's environmental and landscape resources.

Cope, Downward & Lumsdon describe work in progress on the development of an economic appraisal system for the North Sea Cycle Route. This relates to the collection of volume and value baseline data, which will be used to forecast demand for the resource and hence the economic impact of that demand.

The remaining papers deal with economic evaluations in two very different contexts. Dickie describes a multiplier approach to assessing the economic impact and of a particular type of resource - RSPB reserves. This emphasises the importance of wildlife tourism to localities. Maeer and Millar outline a recent project to evaluate the impacts of the restoration of the Kennet and Avon Canal. In this work, economic analysis is seen as part of a wider evaluation programme, which will look how the project impacts upon quality of life. This places economic analysis in a sustainability framework, along with socio-cultural and environmental factors.

Economic analysis is an area of work that is of great significance to countryside recreation professionals. However it is often confusing and couched in technical terms that make it difficult for the non-specialist. Although the actual work is often undertaken by economists, it is important that people involved with countryside recreation understand the basic principles to enable them to commission and interpret work carried out on their behalf. Hopefully this issue of the Journal, together with the CRN Seminar on "Demonstrating the Economic Value of Countryside Recreation" and subsequent proceedings will contribute to understanding.

The North Sea Cycle Route: Economic Impacts of Linear Trails

Andy Cope, *Sustrans*; Paul Downward, *Staffordshire University*; Les Lumsdon, *University of Central Lancashire*

Introduction

The North Sea Cycle Route (NSCR) was launched in 2001. It circles the North Sea, a distance of 6000 km, which makes it the longest trail of its kind in Europe (a map is available at www.northsea-cycle.com). The North Sea Cycle Route development project was established in September 1998, funded by the European Union INTERREG IIC programme. Sixty four local authorities across Norway, Sweden, Denmark, Germany, the Netherlands, Belgium, England and Scotland have participated in the project. This article reports one dimension of the overall monitoring of NSCR, determining the economic impact of a linear route.

One of the major problems facing project managers or tourism officers is that they have to make decisions about tourism development in a given locality without detailed information regarding potential markets and their financial impact on the local economy (Downward and Lumsdon, 2000). Most available data are aggregated at a regional or national level and rarely are studies undertaken at a micro level. This is particularly the case with linear tourism facilities such as waterways or trails where expenditure is dispersed differently to other tourism facilities that attract demand and spending in a concentric pattern. Thus, a fundamental question remains as to how much users spend and the nature of their expenditure patterns on what can best be described as a linear visitor attraction? The study of the NSCR aims to develop a set of tools for analysis and to provide a greater insight into the market for such trails.

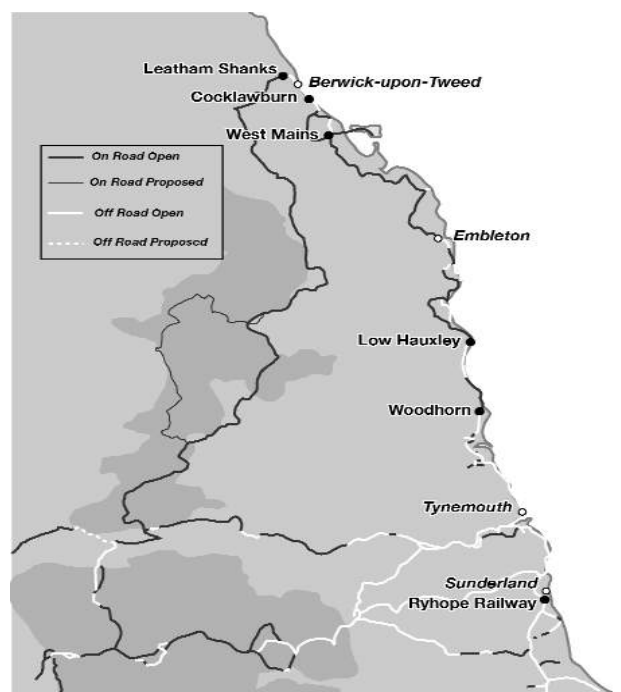
The Research Approach

A study site in the North East of England was chosen

and another in Stavanger, Norway. This reports findings from England only. The selection of research sites was based on a number of criteria: use of existing counters, locations near to centres of population, the need for regular maintenance, data collection and security issues (Cope et al, 1999, Sustrans, 2000). Six survey sites were selected:

1. Ryhope Railway: south of the city of Sunderland [south side of the conurbation]
2. Woodhorn: north of the city of Newcastle-upon-Tyne [north side of the conurbation]
3. Low Hauxley: south of the small village of Embleton [isolated rural location]
4. West Mains: north of the small village of Embleton [isolated rural location]
5. Cocklawburn: south of the town Berwick-upon-Tweed [south side of small town]
6. Leatham Shanks: north of the town of Berwick-upon-Tweed [north side of small town]

Figure 1 The NSCR in the north of England



These sites reflect the idea that there are three types of gravitational area each with a point of access and egress. Sites 1 and 2 are on the route south and north respectively of a large urban area, sites 3 and 4 are to either side of a small rural settlement, and sites 5 and 6 are to the north and south of a small urban area. A continuous count and an intercept survey of cyclists was undertaken at all six sites on three dates in August in 2002, followed by the issue of a travel diary. The intercept survey and diary were coded in order to determine the extent to which diary returns were representative of the whole sample. The self-completion diary included a series of closed and open-ended questions plus a diary section to be completed for a day (or part day) or days depending on the nature of the journey on the North Sea Cycle Route. The diary was designed to capture data which would help to analyse user behaviour, especially type of activity and level of spending in each locality.

The Findings

A total number of 211 solo riders and groups were interviewed thus amounting to 410 cyclists in total with a mean group size of 1.99. Over 91 per cent of trips were for recreational or tourism purposes. Whilst 58% of trips were day or part day trips on the NSCR over 33 % of journeys were for tourism purposes, either for short break stays [up to 3 nights] or for cycle touring [more than 3 nights].

Further analysis of the data highlighted the multi use

of the route, for example, at sites near to the conurbation, some 90% of journeys were made from home and involved short recreational trips. In contrast, the rural sites include a much higher proportion of short breaks and cycle touring journeys from holiday accommodation. Nearly 74% of all respondents used the NSCR primarily for a trip lasting one day or less. However, it is important to note that 26% of respondents used the route as part of a holiday of which 9% were on extended cycle tours. Other findings were that average duration of a ride was between 2-3 hours; 28% were female, 72% male, and that 47% were between 30 and 50 years old. Most respondents lived in the North East of England and many near to the route. However, 28% of respondents were from other parts of the UK and 6% were from northern Europe. A full discussion of the descriptive statistics is reported elsewhere(2004)

A self-completion travel diary was offered to all respondents. Some 65 diaries were returned, a response rate of 35%. Respondents were asked to complete, for each day of travel, notes regarding locations where they stopped, the time and the level of spending at each location plus questions relating to group size, occupational backgrounds, income and level of interest in cycling and nature of accommodation used. Of the 65 diaries returned, 40 were day-only diaries. A summary of the spending patterns are recorded in Table 1

Table 1 Spending Patterns of Diarists

Mean spending per group [average of 2 per group]							
Day	Accommodation	Food/Drink	Gifts	Car costs	Cycle costs	Public Transport	Other
Day 1 [65 diaries]	£17.12	£14.55	£1.10	£3.20	0.46p	0.21p	£1.80
Day 2 [25 diaries]	£22.12	£27.12	0.40p	0.68p	£1.48	£1.76	£4.36
Day 3 [19 diaries]	£10.36	£17.56	0.44p	0.40p	0.48p	0.40p	£2.20
Day 4 [9 diaries]	£3.00	£5.24	0.40p	0.80p	nil	nil	£1.00
Day 5 [6 diaries]	£3.68	£4.76	£2.76	nil	nil	0.16p	£1.36

To explore the determinants of spending an analysis was conducted to show that the value of tourism demand in relation to group composition and the duration of the cycling activity. To address these issues bivariate correlations were employed and positive correlations were established between the following variables [significance levels in brackets]¹

1. Total spending and the number of days cycling [p=0.05]
2. Total spending and the number of hours cycling [p=0.01]
3. Total spending and annual income [p=0.07]
4. Number of days cycling and group size [p=0.06]
5. Number of hours cycling and group size [p=0.08]

These results support the proposition that the economic value of demand is closely linked to the duration of trip - within or across a number of days² To further refine the results differences in the total and per capita mean expenditure between those cycling for less than one day and those cycling for more than one day were conducted.³ The results

indicate that the average spending was higher, the longer the duration of trip. Similar tests revealed that spending per hour of cycling was statistically greater for those cycling for longer than one day.

These results reveal that the spending patterns of recreational cyclists and cycle tourers are not simply the result of aggregate spending across groups. The results also indicate, at a lower level of significance, that whilst there is no direct link between spending and group size, the latter is linked to duration of cycling. In turn, duration is linked to group size and the implication is that increased group sizes are associated with longer trips and higher levels of spending. In terms of forecasting user spending, the results from three the survey sites, one near to urban and two rural locations, combine group size, spending and count data to illustrate the propensity of different market segments to expenditure as shown in Table 2. Average expenditure was significantly lower for cyclists intercepted in the urban fringes as opposed to those in rural areas. The near urban trips are of very short duration with little spending on food or drink.

Table 2: Forecast of spending at three survey sites

August Surveys					
Site	Total Spending per Group	Total Counts	Average Group Size	Total Groups	Total Group Spend
Woodhorn	£1.27	814	1.7677	460.49	£584.80
Low Hauxley	£40.47	1992	2.1711	917.50	£37,135
Leatham Shanks	£55.28	296	2.3429	126.33	£6,984

Implications

Whilst the volume of activity is associated with urban areas, the value of cycle tourism lies in the smaller urban and rural areas, where the impact is impressive. The degree to which spending is concentrated along the rural sections of the route requires extended analysis. Further work could also

incorporate the duration of trip and thus provide details of zones of spending which would help spatial planning. Finally, knowledge of how income affects spending can provide an understanding of how the market may be segmented. The next stage of the monitoring programme, to be undertaken in 2004, will gather more data and thus enable a multivariate analysis to be undertaken in order to

weight the components of spending in a forecasting model. In addition the research team will be developing a micro multiplier model which will enable trail planners to assess, with greater accuracy, the extent to which such routes, or sections of trails, can stimulate economic impact within localities.

Footnotes

¹Spearman nonparametric tests were employed because of the likely non-normality of the variables.

²The results were also replicated for key aspects of spending such as accommodation and food and drink. In contrast this was not possible for items such as cycle expenses etc. This is not a surprising result as the former comprise the main constituents of total spend.

³This involved employing a t-test of the differences in the means. The tests were run assuming that the variances were both the same - a more restrictive case - and different. The same results were identified in both cases.

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Nature Conservation and Local Economies

Ian Dickie, The Royal Society for the Protection of Birds

Introduction

Wildlife is not important because people value it, wildlife has value to people because it is important. Yet the value of wildlife is subject to increasing scrutiny, as the costs and benefits of nature conservation projects are compared to alternative uses of resources. Economic studies have attempted to capture nature's intrinsic value to human beings - the price we put on its existence. These informative but controversial studies produce questions as well as answers¹.

The economic impacts from human activity surrounding nature give a practical way to capture the 'value' of nature. This does not tell us about nature's intrinsic worth, but provides a practical basis for comparing the economic impacts of wildlife management with other human activities, particularly in rural areas.

This RSPB has contributed to the literature on nature conservation and local economies for several years, and a significant body of information is now available on this subject. This article picks out some key conclusions from recent work in order to encourage the use of this material, all of which is available on the RSPB or other websites.

Assessing the Economic Impact of Visitor Spending

Visitors' to nature reserves can benefit a wide range of enterprises in the local area, from hotels and campsites to cafes, local transport, shops and other local businesses. These benefits can be measured as visitor spending, jobs supported and additional business turnover. A proportion of this turnover is used to meet the wage costs of the proprietors and employees, directly supporting employment. Businesses in direct receipt of visitor spending in turn also spend some of their turnover on purchasing

goods and services from other supply businesses. These purchases in turn boost the turnover of supplier businesses supporting additional indirect employment in those businesses. Finally, employees whose jobs depend directly or indirectly on visitor spending in turn spend money in shops, attractions and other local businesses, resulting in further induced jobs and incomes in the area.

The size of direct, indirect and induced impacts can be estimated using tourism multipliers, allowing an assessment to be made of the effects of visitor spending on the local economy. Ideally, local multipliers would be available for each site studied, and would vary to reflect differences in the structures of local economies. In practice, multipliers are only available for parts of the UK. Rayment and Dickie (2001) reviewed evidence of tourism multipliers in the UK. They concluded that most studies suggested an employment multiplier of £35,000 of local tourism spending required to support 1 FTE job, taking account of direct, indirect and induced effects.

This method establishes the scale of the impact from visitor spending on a local area. However, caution must be used in attributing this entirely to the nature reserve in question. Economists are interested in the change that results from the presence of the nature reserve.

Therefore, the RSPB's work has used surveys to look at the role reserves play in motivating people to visit, or extend their stay in, an area. It is only appropriate to claim visitors' spending as a benefit associated with a nature reserve, where the reserve has played a major role in their motivation for being in the area.

In a study of the North Norfolk coast, walking and birdwatching were the most popular activities of

Photo by Andy Hay, RSPB images



Visitors to Titchwell RSPB reserve spend £1.8 million in the local economy, supporting 39 direct and indirect FTE jobs

visitors to the area, and 34% of visitors said that birds and wildlife were their main reason for visiting. Of the £21m per year of estimated spending by visitors to the study's six sites, £6.2m per year was attributed to visitors attracted mainly by the area's birds and wildlife (RSPB, 2000)

RSPB Reserves and Local Economies

RSPB reserves support over 1000 jobs in their local economies throughout the UK (Shiel, Rayment and Burton, 2002). These jobs are divided, roughly equally, between: direct employment of nature conservation staff; those supported by the spending of visitors to reserves; and indirect employment of contractors and others involved in managing reserves (such as through agricultural tenancies).

Understanding the breakdown in these jobs helps suggest a structure through which impacts can be analysed. Such structures are needed to ensure that results are robust, and comparable to other economic data. Comparisons show that RSPB reserves support:

- Significantly less employment than intensive

agriculture, (but this is an unfair comparison, as nature reserves generally occupy more marginal land),

- Slightly less employment than agriculture in Less Favoured (upland) Areas, and
- More jobs than UK forestry or grouse moors.

These UK comparisons should not be applied without considering local circumstances, but they challenge the notion that nature conservation has no economic value.

Further work by the RSPB has compiled case studies of nature conservation and local economies (on and off official reserves). Conservation Works (Rayment and Dickie 2001), Working With Nature in Britain (Rayment, 1997) and Working With Nature in Europe (Cuff and Rayment, 1997) document the impacts of wildlife tourism on areas like Orkney, The Isles of Scilly, Minsmere in Suffolk, breeding Ospreys at Loch Garten in the Highlands, and many more. Each of these reports can be accessed through the RSPB website at: <http://www.rspb.org.uk/policy/Economicdevelopment/economics/index.asp>

Wildlife and Recreation

The local relationship between nature and tourism is well known through case-studies like those undertaken by the RSPB. However, assessing the overall scale of the relationship between wildlife and recreation is more difficult to assess. Nevertheless, analyses of the wildlife-tourism sector have been made in the UK, which were summarised by Rayment and Dickie (2001).

A recent study into the economic uses of wild living resource in the UK for the IUCN (Murray & Symcox, 2003) concluded that:

"The greatest value obtained from the use of wild living resources in the United Kingdom comes from the value attached to leisure pursuits, especially shooting of game mammals and birds, marine mammal and bird watching, and angling." Murray & Symcox (2003) p 97.

Information about environmental-tourism can also be found in the series of reports into the environment and the economy in Wales and the regions of England. A virtual library of these reports exists on the RSPB's website under the title of Green Grows the Economy (RSPB 2003). These reports look at all aspects of the role that the environment plays in a regions economy: in primary industries like agriculture and forestry; in environmental protection work and nature conservation; and in leisure and tourism.

For example, the South West Regional study identifies spending by landscape-motivated holidaymakers of £1.8bn per year. Including the multiplier effects of this spending gave an estimated employment impact of 54,000 jobs supported by landscape-motivate holiday trips in the South West.

Conclusions

In the UK, wildlife tourism is now a distinct industry. Spending by visitors to nature reserves, such as those managed by the RSPB, can be economically important to local areas. However, care is needed in using statistics about the economic benefits, to that

impacts are distinguished from the aggregate level of activity.

Numerous information sources, including those on the RSPB's website, now exist. It is hoped that they will be used to support the sustainable use of the countryside in the future.

Footnotes

¹For further reading on this subject, English Nature (2002). *An excellent starting point, it sets out a clear framework for categorising the values that nature provides for society (including recreation).*

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<http://www.rspb.org.uk/policy/Economicdevelopment/economics/index.asp>

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Changing Economic Benefits of the Highlands and Islands Countryside Recreation Market

Archie Prentice, Scottish Natural Heritage

A hundred years ago, countryside and outdoor recreation brought a significant benefit to St Kilda's fulmars. The birds were no longer on the menu as islanders traded with visiting cruise ships for tinned provisions. At the same time, early 20th century walkers were exploring Scotland's glens and Munros. Lonely shepherd and estate workers cottages became early prototypes of bed and breakfast accommodation as countryside recreation brought new economic benefits to remote highland glens.

Countryside and outdoor recreation is not new. As more people have become interested in rural pursuits, customer requirements are increasingly sophisticated and diverse. What do these sophisticated customers want? How does the industry satisfy their desires? How do we maximise benefits and spend while sustainably managing the environment? These are some of the challenges facing the 21st century outdoor recreation industry.

The 2001 outbreak of Foot and Mouth Disease brought home how our use of the countryside was changing. Closing the countryside highlighted the range of businesses delivering outdoor activity. At the time of the outbreak, traditional land based employment in the Highlands and Islands accounted for 27,000 jobs, generating £440m. Whilst this employment has been falling for decades, tourism and recreation has moved on from those early 1904 bed and breakfasts, and now supports 22,500 jobs generating half a billion pounds for the region's economy.

How has the outdoor recreation customer changed in the last 100 years? With improved transport links the outdoor environment is no longer the domain of the dedicated enthusiast. Visitors are vastly more experienced than in 1904 – well travelled, well read and well educated. They research holidays before travelling. They are prepared to pay, but also to mix

and match, for example a low-cost flight plus a 5 star hotel. VisitScotland, responsible for marketing Scottish tourism overseas, recognises how customer demand is changing. This public sector body promotes 5 niche tourism themes – freedom, cities, culture and heritage, activity and business tourism. Gone are the days of one holiday a year squeezed into a short summer season. 21st century recreation customers want activity, 52 weeks of the year. They want choice, for example walking one day, mountain biking along forest tracks the next. They may visit a local museum where models of those 1904 shepherd and estate workers cottages are in an exhibition of the area's history.

If we understand demand, we can work with industry to deliver supply. An interesting case study is the area around Fort William. The area is home to the UK's highest mountain and Ardnamuchan - the most westerly point on the Scottish mainland. In the second half of the 20th century boat building, a large pulp mill and aluminium smelter were important local employers. When economic climates changed, these heavy industries declined, with one in 5 of the area's men becoming unemployed. Now the area is rapidly establishing itself as the outdoor capital of the UK. With unemployment of 3%, businesses struggle to find enough labour. Opened in December, the world's largest indoor ice climbing arena is located in a redundant smelter building in Kinlochleven, between Fort William and Glencoe,. The Ice Factor is expected to attract 50,000 visitors a year to this highland village. North of Fort William the Aonach Mor ski facility has diversified into mountain biking. Here the world downhill mountain biking championships in 2003 attracted 8,000 spectators and generated more than three quarters of a million pounds net economic benefits for the area. Nearby, an international white water canoe course has been proposed on the river Lochy, where flow at a smelter tail race can be twice that of the Barcelona Olympics course. In the western

area of Lochaber, water sports such as sailing and diving are increasingly popular, and support a variety of small businesses.

How can we maximise the benefits of this activity, without compromising the local environment? From targeted research, we know a lot more about the sort of people who visit the countryside and how they spend their money. The results are useful for promotional activity, and can also help lever further development funding. Research can also identify how to help growth for example by improving infrastructure and encouraging development opportunities. The forestry commission for example is doing this by encouraging the growing off-road cycling market to use its network of forest tracks, while general outdoor tourists would like more interpretation, toilets, refreshment opportunities, seating, viewpoints and hides.

New figures out this year will show the economic value to the Scottish Highlands and Islands of a number of outdoor niche activities: cycling, snowsports, hill/low level walking, outdoor culture and heritage, wildlife tourism, water sports, equestrian activity, sea angling, game fish angling and outward bound activities. With work to implement a new statutory right of responsible access to land and water ongoing in Scotland, timing couldn't be better. The last assessment of Highlands and Islands hill walking in 1996 found nearly 4,000 jobs were supported and income of £34m generated by walkers. The current research will also identify ways of improving what we offer visiting walkers.

The countryside recreation customer has the final say on the right balance between economic benefits and sustainable management. More educated, more demanding and with more choice, customers will vote with their feet and their money. Operator accreditation schemes and codes of conduct may provide the reassurance customers want. The Green Tourism Business Scheme developed in Scotland, is a quality assurance programme for tourism businesses focussing on environmental good practice. Advantages of the scheme include reducing running costs, increasing market appeal, and increased

environmental awareness.

After such dramatic change meeting the needs of well-travelled, well-read and well-educated customers, what challenges does the future hold for the countryside recreation industry. First, how can we make sure everyone benefits from countryside recreation? Low income, disability and age could all restrict access to opportunities. How can we ensure everyone enjoys the outdoors in future? Second how will we better understand the package of market and non market benefits our countryside provides - landscape being the canvas for outdoor recreation, biodiversity the colour. How can we add landscape and biodiversity to the economic benefit equation, helping to differentiate from a generic or commodity product. Finally, how will the outdoor recreation industry remain competitive as it operates in an increasingly global marketplace. Access to foreign destinations presents recreation opportunities for UK residents. But perhaps more importantly, domestic businesses could compete in overseas markets and import fresh customers to our countryside recreation industry.

As they sit in the UK's largest fulmar colony, what would the ancestors of those early 20th century St Kilda birds, make of this change?. Disturbance now will not be from hunters, but from visiting bird watchers. The birds can take comfort that their value is not as food, but as models for photographs and videos. Their economic contribution from bird watching is now appreciated. They will look down on island waters that shelter visiting yachts. Chartered from the mainland, perhaps even Ardnamuchan, customers will have paid to crew these sailing boats. There may even be the odd cruise ship that pops by, passengers attracted to the islands by their World Heritage Site designation. The birds will watch as divers explore the islands' submerged caves, tunnels and arches, benefiting from the area's clear water and lack of pollution. They will watch individuals on working holidays move about the isolated islands having paid for the opportunity to visit and undertake maintenance or research. And the islanders? The struggle of island life became too formidable and they

left several decades ago.

Customer demand will continue to drive change. Getting the right supply in an expanded EU where we are even further on the periphery will be the challenge. Change, as St Kilda's fulmars have witnessed, will come, and is not always bad.

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Valuing Wildlife Recreation and Leisure

Ian D Rotherham, Simon Doncaster and Dave Egan, Sheffield Hallam University

Preamble

The 'Wildlife Leisure Industry' is often neglected and overlooked in concept or reality. Yet its importance to environmental conservation and hence sustainability, and increasingly for local economies is significant. More recently too, there is increased awareness of the value of wildlife-based recreational activities in helping to deliver improved health at all levels – physical, emotional and psychological. Attempting to tease apart the trends and issues is not easy, and wildlife experiences, resources and services are intimately interlaced with those of heritage landscapes, archaeology, and general outdoor activities.

A quick look at the economics confirms this importance. In the USA nature conservation and associated wildlife leisure and tourism, are massive. Southwick Associates (1994) estimated that each year in the USA, 24 million people go bird-watching. They spend >\$5 billion, helping to employ 190,000 workers. In Australia, tourism activities concerned with the Great Barrier Reef earn \$90 million per year; whilst in Florida, reef-based activities are worth around \$1.6 million (Eber, 1992). The Galapagos Islands World Heritage Site and Biosphere Reserve in 1989 had 32,500 visitors, with around 50,000 per year expected by 2000 (Shackley, 1996).

These figures present a picture of a very major industry. They also bring into sharp focus the ecological and indeed economic risks if exploitation is not carefully managed to be sustainable. It is therefore surprising that these key issues seem to hold little sway with policy makers and planners when it comes to protecting locally important wildlife sites. Similarly there are serious issues in terms of lack of support or in investment in our nature conservation services and advisors - those that deliver much of this important resource. A quick look at the employment figures for

local authorities, or at the staff structures and development reviews of the same, or even of our National Parks, and the numbers and status of say ecologists, archaeologists, countryside managers, and rangers does not make for encouraging reading. And yet it is within these areas of work that the basis for an important market sector is visioned, assessed, managed, protected and promoted. The status and professional standing of workers in these fields is currently a serious concern for their respective institutes and associations, and the level of political awareness of their importance and potential is poor at almost every level. What is even more strange is that the economic and political justification for better recognition and more reasonable career progression etc, is probably not the traditional argument of the environment (in all its manifestations) as a 'good' and 'important' thing to care for. No, it runs far deeper than this. These areas of work have roles and importance that are critical to 'quality of life', to sustainability, and to local economies. This is where the true value lies, and it is to a great extent apparent through the delivery, directly or indirectly, of environmental leisure and recreation.

Some of these issues and ideas were examined in two critical review papers in 2000 (Rotherham *et al.* and Beard *et al.*). In these we established the broad nature and scope of two critical areas of activity – the 'wildlife leisure industry' and the 'outdoor leisure industry'. We addressed and defined the key aspects of this complex sector. This included the scope and relationships inherent in the continuum encompassing wildlife leisure (from nature conservation via eco-tourism) through to mass-market tourism. The context, significance and role of leisure and tourism within the environmental conservation industry are now clearly established, and examples of economic importance are provided. In particular we suggested that it is important to recognise 'Wildlife Leisure' as a concept

to help inform discussions of sustainability, of tourism, and of rural development. This change of focus is also needed within the relevant environmental professions in order to elevate their status and better recognise their critical role in the definition of strategy and in the delivery of practice.

The mutual relationships between local economies, eco-tourism and environmental and heritage conservation is well documented. It is tightly established in the definitions of eco-tourism, for example, Ecotourism Society (1998), Jaakson, (1997), Roe *et al.* (1997), Sun and Walsh (1998). Positioning wildlife leisure and tourism within leisure and tourism frameworks is important in providing definitions and establishing concepts. With current trends towards rural extensification and the redirection of former agricultural subsidies (in the UK and across the European Union) recognising links and associations between wildlife leisure and the rural framework is increasingly vital.

The substantial contribution of many 'nature conservation' activities and wildlife-related leisure to the wider economy has generally been overlooked. However, in recent years the economic significance of the 'Wildlife Leisure Industry' has begun at last to be more effectively assessed and documented. The results are startling. The Suffolk Coast and Heaths Area of Outstanding Natural Beauty in south-east England received 6.3 million visitors in 1997 of which 2.3 million were countryside visitors (Ardell pers. comm.). Translated into economic impacts, and further assessed in terms of quality of life and health benefits, the VALUE written broadly is colossal. Research from the RSPB, the Forestry Commission, and the National Trust has produced similarly impressive assessments of their effects on locations, and on regional economies and their communities. There are many other aspects of this hidden role of environmental quality, but space doesn't allow a full discussion within this short paper. However, the point is made, and it is interesting to note that most of this research originates from two main sources. These are either voluntary sector organisations clearly wishing to establish the nature and importance of their roles

more effectively, for both local communities (where tensions may sometimes arise) and for government, and government land management agencies. The latter are seeking to establish more effectively, their roles in the leisure and tourism sectors in the eyes of central government, and in the face of weak markets for their primary produce.

Yet conservationists and environmental professionals have tended to focus on their own priorities and areas of expertise - in this case wildlife conservation and management, and perhaps on education. Whilst understandable, it seems that this has disadvantaged the 'industry' in terms of wider recognition and we would argue, professional status. A genuine fear and distrust of economic modelling and valuations by the sector may be an underlying issue. The current research being undertaken at Sheffield Hallam University helps address this. The application of appropriate economic models to this industry helps more fully establish its relationship to the wider socio-economic context. This aids its recognition by key players in the leisure and tourism sectors. It is also obvious that these arguments can help in addressing the inertia and lethargy of major politicians and their parties in understanding the critical importance of the environment in all aspects of our lives and our existence.

The background

Rising membership of environmental and wildlife conservation organisations in the UK and around the world, and the increasing importance to conservation of leisure aspects of environmental participants forms a backcloth to this debate. With all these the economic benefits that arise are huge and generally overlooked. The popularity of nature / wildlife based television and associated leisure is very high with wildlife and nature based programmes significant in popularity ratings. Include programmes on gardening and animals in general and the situation is even more impressive. Wildlife based documentaries and associated productions 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). The presenters of these programmes become celebrities and as household names, the spin-off books, videos etc. are bestsellers, and this is big business.

Recreational visitors - tourists and day visitors - have a big impact on local and regional economies; as a component of regional tourism they are important. In Lincolnshire for example, Gibraltar Point National Nature Reserve, is the County's second most important visitor attraction after Lincoln Cathedral. It currently attracts around 160-200,000 visitors per year (Gibraltar Point National Nature Reserve Management Report 1999). The reserve also attracts substantial grant aid and generates both full-time permanent employment, seasonal and part-time jobs, and contract work. So far little of this has been effectively quantified or recognised in terms of its contribution to the area.

Again on the east coast of England, another example of economic importance is that of the small ships and boats (such as the Yorkshire Belle at Bridlington) that run thriving businesses carrying wildlife enthusiasts to see bird reserves and seals along the cliffs, islands and sand-banks of the coast. This activity provides an important service to tourists, and revenue to operatives, maintenance contractors, service suppliers etc. As part of suite of activities, it attracts visitors and tourists to the area, supports hotels and pubs, and provides revenue to suppliers of guidebooks, maps, cameras and films, binoculars and telescopes, outdoor clothing, other merchandise, memorabilia etc. All this activity depends on environmental quality, on provision of suitable and accessible sites (with the key species visible!), and the back-up support of information to enthusiasts and the wider public.

Tourism and the developing world

Shackley (1996) notes the figure provided by the World Tourism Organisation (1993) that global tourism has an annual turnover of c.\$3 trillion, and from the World Travel and Tourism Organisation that 204 million people are employed directly or indirectly through the industry. The estimated contribution of

tourism revenue to developing countries is c.\$55 million, and global nature-based tourism is growing at c. 20% pa. The importance of this industry to developing economies is potentially very great. >70% of visitors to Ecuador for example, are motivated by an interest in wildlife. Etosha National Park in Namibia is home to 114 species of mammal and 340 species of bird. Attracting 45 000 visitors per year, it generates income of c.£2 million. The Costa Rican Tourism Authority expects a 300% increase in natural history-based tourism by 2000. From around 1500-3000 visitors in 1980, it had increased to 250 000 by the mid-1990s. The Iguazo Falls in Brazil already attract two million visitors per year.

Wildlife Recreation in developed countries

The sector is also big business in the developed economies. A few examples help demonstrate this:

- Around 10,000 people visited Pembroke, Ontario to see the annual flocking swallows, generating an estimated C\$520,000.
- c.17,000 bird-watchers visited Canada's Point Pelee National Park in 1987, to see the spring bird migration, giving an estimated revenue of C\$6.3 million.
- The Sea Life Centre at Blackpool, England had 600 000 visitors in 1992.
- In the USA, the National Aquarium at Baltimore, Maryland, was opened in 1987 as part of an urban renewal scheme and within three years had created 300 jobs, and generated \$88 million in tourism revenue.

According to Robinson and Bolen (1989), the annual spend by USA residents on wildlife viewing trips, is around \$4 billion, and they also spend \$600 million on field guides, bird houses, bird food and bird baths. In 1980, this included \$500 million on birdseed.

Whale watching in the USA involves around 1.5 million visitors per year, spending c.\$1 billion. In California alone, in 1981, whale watching attracted 235 000 people, and was worth around \$2.2 million per year. With Basking Shark watches and Dolphin viewing this is also an expanding activity in the UK with centres around Scotland and in the south-west of England.

A number of key reports in recent years help gauge the impact on rural economies. The work of Rayment and colleagues at the RSPB is especially helpful. Smith and Harley (1993) looked at visitor spending at RSPB reserves in the late 1980s, and estimated £7.7m extra spending in local economies directly associated with visits to RSPB reserves, and noted that overnight stays increased economic benefits from visitors to the local area.

CEAS Consultants in 1993 in *'The Economy of Landscape and Nature Conservation in England and Wales'* noted the lack of studies on multipliers associated with nature conservation activities in the UK as a whole. For tourism generally a multiplier of 0.25-0.45 was usually applied. This assumes that for £1000 of tourist expenditure, £250-£450 of net income is injected into the local economy. For employment generation, a multiplier of 0.1 was used; i.e. for every £10,000 of direct expenditure, there was one full-time job equivalent (FTE). In estimating net income from visitors attributable to conservation, crude estimates were made on the proportion of total UK tourism revenue. With assumed wages, salaries and profits @ 30-40% of gross income, there was a ratio of 3:1 of visitor expenditure to direct conservation expenditure. Rayment (1995) and CEAS (1993) indicated levels of expenditure in local economies on nature conservation as £384 in England, and £44 million in Wales.

Brooke and Rayment developed these ideas further in a report for the RSPB, *'The Environment and the Regional Economy: Opportunities for the Regional Development Agencies'* (1999). This brought together key information recognising that in the past, nature conservation has been viewed as a limiting factor for economic development. However, the authors suggested that nature conservation is increasingly being seen as a significant source of employment and income. This was through:

- *Direct employment in nature conservation;*
- *Expenditure on nature conservation;*
- *Conservation schemes (e.g. agri-environment and woodland management*

initiatives);

- *Attraction of visitors and their expenditure on local goods and services.*

Direct employment in nature conservation in Britain was:

- *England: 7,666 (1991/2);*
- *Wales: 1,065 (1991/2);*
- *Scotland: 6,680 (1996).*

Data from two case studies are examples of the trends:

- *Leighton Moss Nature Reserve in North Lancashire: twenty-two full-time or part-time staff, and 100,000 visitors per year.*
- *Abernethy (Osprey Visitor Centre in Scotland): eleven people directly employed and £1.7 million per annum as visitor spending attributable to the nature reserve, supporting the equivalent of sixty-nine full-time jobs. This gives a total of eighty-seven full-time jobs in 1996, with further jobs due to expenditure by the reserve on contractors, goods and services.*

Some examples of Wildlife Leisure and Tourism as economic forces in the Countryside

Geoff Broom Associates (1997) suggested that tourism in the English Countryside is worth c.£8 billion per year; a huge economic force. Important here, is the proportion attributable (directly and indirectly) to natural heritage and to wildlife leisure. CEAS (1993) suggest that £350-450 million of tourism expenditure in England and Wales in 1991 / 2 was related to nature and landscape conservation. Along with this they give figures of 53,500 jobs, i.e. six jobs for every one directly employed in conservation itself. 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.

Mackay Consultants (1997) noted that natural heritage related tourism and recreation are more

significant generators of employment, than is work directly related to natural heritage. 82% of visitors to Scotland gave 'scenery' as a reason for visiting, and the total holiday tourism expenditure contributed £1.7 billion to the Scottish economy. This supports around 8% of the total workforce. They concluded that the natural heritage makes an important contribution to the Scottish economy. It not only provides employment in conservation related activities, but also by providing the basis for one of Scotland's most important industries: tourism. [An estimated £105 million per annum was related to natural heritage]. They also recognise that a source of tension, is the poor economic feedback into managing the resource. This is a point we discuss later.

Looking at wildlife holidays in Scotland Sime and Crabtree (1991) found the annual turnover of forty-one businesses ranged from £1,000 to >£196,000. They also found that designated wildlife sites (i.e. nature reserves) were the most important element in the total economic effect of wildlife and its conservation. Their later research focused on surveys of visitors to this type of site in Scotland, including all National Nature Reserves, Forest Nature Reserves, Scottish Wildlife Trust Reserves, RSPB Reserves, National Trust for Scotland sites, and some smaller sites as owned by local authorities. They found a total of c.3.9 million visitors per year, with an average of 23,000 per site. A detailed evaluation of the Orkneys, Wester Ross and Highlands Perthshire gave visitor expenditures of £0.67 million in Wester Ross (£12.80 per visitor), £1.78 million in Orkney (£41 per visitor) and £2.79 million in Highland Perthshire (£14 per visitor). They calculated retention multipliers in the local economy of 1.24 (Orkney), 1.18 (Wester Ross), and 1.34 (Highland Perthshire).

Hooper (1991) evaluated ferry passengers to the Orkneys to help assess the importance of tourism to the economy of the islands, and the contribution of wildlife tourism to the overall tourist profile. 'Green' Tourists' spent £2.3 million, Wildlife Tourists £26.9 million, and others £14.8 million. The average spend per visitor was £26.90 in summer, and £32.90 in spring.

Crabtree *et al.* (1993) also considered the economic value of open-air recreation in Scotland. Looking at rural tourism, they found an income of c.£400 million *per annum*, i.e. c.25% of the total tourism expenditure for the Country. Most of the £400 million was spent in country towns, with an estimated 10% (i.e. £40 million) accruing to land-based businesses and households. Using multipliers they estimated a net income of £200 million and 20,000 FTE jobs. However, the total number of jobs was higher due to the seasonality of the work and its often part-time nature. They estimated expenditure by day-trippers in Scotland as £25 million *per annum*, with an associated generation of £6.5 million in rural income, though this may be too low.

Smith (1992) investigated wildlife tourism in Devon based on the RSPB's Exe Estuary 'Avocet' Cruises'; with 853 users paying £7.50 per ticket, giving a total revenue of £6,400. Around half their sample bought nothing from the local area except their ticket - an aspect of planning and development that is important to consider if local economies are to benefit from visits. This aspect of 'leaky' tourism is an area that desperately needs more detailed study in terms of its relevance to wildlife and heritage visits.

Discussion

It is clear that rural development can no longer rely on agriculture and traditional sectors for economic growth and social cohesion (WTTC, 1999). With travel and tourism worth around 10% of the global economy and growing they bring potential for economic growth. This is along with an increasing market for experiences of nature, heritage 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.

In this introductory account, we touch on many areas,

Photograph by Paul Robson



and skim over much that merits closer attention. However, it is worth considering briefly the role of tourism in leisure, in terms of our starting point of the concept of the Wildlife Leisure Industry and the importance of recognition of this by relevant professions. Failure to get involved and to understand more clearly how the various players together forge this emerging sector is a serious problem. Indeed we have already alluded to the consequences of this failure. Unfortunately though the impacts don't stop here. There is an emerging crisis in terms of a chronic lack of recruitment to university degrees and other training in countryside and conservation related areas. In part this reflects a lack of awareness of career opportunities by parents and by schools careers advisors and others. The message is simply not getting through. However, it is also increasingly the case that students or trainees will leave their educational establishments with the burdens of significant personal debts. In this case their career choices are directed away from vocations that they might see as worthwhile and satisfying but poorly paid, towards those offering a 'fast buck', and a 'quick fix' to their financial circumstances.

So how does this relate to valuing the environment

associated recreation? Well it does so directly and implicitly. The relationship between environmental quality and those that deliver it, and mainstream issues of economy and employment, health and quality of life, need to be made. This needs to happen in order to raise the profile of the associated professions to redress the imbalances of recognition and status within organisations, between professionals that help direct and deliver these resources and services - countryside managers, ecologists, archaeologists, educators, rangers and trainers, and those who choose to be the organisational managers and administrators. Without better structures, careers and recognition - based on professional skills, standing and quality, and not necessarily related to the number of (often junior) staff in the management pyramid below, then we will fail to attract the numbers and calibre of key professionals into the sector. Without the professionals, the services and support structures that are needed cannot be delivered. In which case the circle cannot be squared, and neither the environment nor the economy will be sustainable.



But there is more! One consequence of a more effective profile, and the recruitment of good, well-rewarded professionals, is a more vibrant countryside and environmental sector. To achieve this it is necessary to develop a far more effective promotion not of the importance of the environment, but of the opportunities to work in it. More directed promotion about opportunities; more good professionals working in the countryside and in related areas, and in the delivery of education, training and environmental activities - such as wildlife recreation, will mean more visitors to nature reserves and country parks, more members of conservation and other heritage groups, more environmental leisure visitors, more overnight stops at hotels, more sales of outdoor equipment etc, and a more vibrant rural economy. Particularly if this can be harnessed to the consumption of local foods, and other local products, and the enjoyment of local culture and wildlife experiences, then the idea gets right to the core of many of the current problems for the rural economy. The key is education writ broad, and the motto should be: 'Education, education, education.'

This fulfils many objectives, and of course we should

be doing this and also conserving the environment and heritage resources because these are inherently good things to do. However, that isn't winning the arguments - not when the crunch really comes. Linking these same ideas and objectives to local economies and of course to quality of life and health - and consequent economic benefits, might just make policy makers and politicians take it a little more seriously.

The final but perhaps key thought on this situation relates to the need to understand what tourism is - and as importantly what it is not. A recent meeting of the Institute of Ecologists and Environmental Managers on Upland Environments and Tourism highlighted the inherent problems that may spring from a lack of cross-disciplinary discussion. There is a widespread view - reinforced following publicity after the most recent Foot-and-Mouth Disease crisis in the UK, that tourism *per se* is a panacea for all economic ills of the wider countryside. It is not. There are two main reasons and many supplementary ones for this. This first is that in many cases tourism and other recreational activities don't directly support or facilitate to management of the wider landscape in which they

take place - and indeed which is often critical in them being attractive areas to visit. (It might be argued that some forms of game management and country sports do address aspects of this). However, most tourism doesn't and in many cases (of course not all) the financial costs of managing the resource and the benefits from visitors are not placed with the same organisations or the same people. This is a big difference between modern tourism and more traditional, rural, economic activities.

The second key point to remember is that much tourism is both fickle and seasonal, when what we need in the rural economy is a degree of stability, reliability and predictability. This suggests that leisure, tourism and recreational activities can support and aid rural regeneration, and they can make vital services etc viable, but they won't replace or supplant more traditional rural economies. Again this is where for success, we need to establish the links back to managing the resource; and yes, the key is good professionals on the ground to make it happen.

Key References - full details of references given in the text are provided in the following two papers:

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Economic Evaluation of the Kennet & Avon Canal restoration

Glenn Millar and Gareth Maeer, British Waterways

Background

The Kennet and Avon Canal runs for 87 miles, connecting the River Avon at Bristol with the River Thames at Reading, effectively linking London with Bristol. As with all waterways, usage of the canal declined in the face of competition from other forms of transportation and it was eventually closed to navigation in 1955. Subsequently, the voluntary-sector Kennet and Avon Canal Association campaigned for its re-opening and, by the 1960s, a number of small restoration projects were being undertaken by volunteers, by then working as the Kennet and Avon Canal Trust. Over the next 30 years around £9.5 million was invested by a partnership comprising British Waterways, the Kennet and Avon Canal Trust, the Association of Canal Enterprises (representing canal-based businesses) and the riparian local authorities. The culmination of this work was the re-opening of the canal to through-navigation in 1990.

Nevertheless, the waterway still suffered from significant and long-standing structural problems of water leakage and embankment stability, which, unless they were addressed, would have threatened future usage. In 1996, a partnership between British Waterways, the Kennet and Avon Canal Trust and the local authorities made a successful £25 million bid to the Heritage Lottery Fund (HLF) to complete the restoration of the canal. Match funding, totalling an additional £4.2 million, was provided by the partnership members. Work began in 1997 to secure the future of the canal. In this HLF-sponsored phase the main works were directed at: ensuring an adequate water supply to sections of the canal through Devises; stabilising the embankment within the Bath Valley; improving access and interpretation; and carrying out nature conservation, heritage and

landscaping projects throughout the length of the waterway.

The scheme was completed in December 2002 and the Kennet and Avon Canal was officially re-opened in Summer 2003.

Evaluation of impacts

A monitoring and evaluation framework has been established for the canal, covering all aspects of impact that the restoration scheme is expected to deliver - economic, social / cultural and environmental. Obviously the prime drivers of the HLF project related to the environmental and cultural dimensions. However it is not appropriate to view these in isolation. British Waterways has developed a comprehensive approach to major schemes, whereby all potential impacts - economic, social /cultural and environmental - are identified and quantified, where possible, at the project appraisal stage. This is based on the use of sustainability indicators, related to the national 'Quality of Life Counts' series. This means that the scheme can be tied into delivering local quality of life priorities. At the same time the indicators form a baseline for on-going monitoring and evaluation of projects.

In 2003, British Waterways commissioned Ecotec Research & Consulting Ltd to undertake an evaluation of the economic benefits generated so far. Their evaluation used data collected by British Waterways through visitor surveys and usage monitoring systems. (This emphasises the need to think about evaluation at the project appraisal stage. Development of a project monitoring plan ensures that systems are in place to make the necessary data available for evaluation.) At the same time as the economic evaluation, British Waterways undertook a

number of surveys in the vicinity of the canal to look at the impact of the scheme on the local community.

market may be contributory factors in the location decision.

The economic impacts assessed related to the spatial effects of the investment in the canal corridor, particularly in terms of employment. These arise from two sources:-

1. Recreation and tourism activity attracted to the restored canal, whether through boating or towpath use. This generates opportunities for tourism-related businesses within the wider corridor.
2. Development opportunities alongside the canal. For some developments, particularly those that are tourism-related, the canal might be the key factor in choosing the location. For others (e.g. retail or office), the improved environment, recreational opportunities and

Obviously any economic analysis needs to take account of potential double-counting between these two sources.

Recreation & tourism impacts

An immediate and obvious leisure benefit of the post-1997 restoration work is an improvement in the quality of visitor experience. Surveys undertaken along the canal towpath in 2001 and 2002 show this. For example, at Bradford-upon-Avon a comparison can be made with an earlier survey undertaken in 1997. This gives a clear indication of the improvement in visitor perceptions, which the work has delivered - with the proportion of visitors claiming to be 'very satisfied' more than doubling on every count.

% 'very satisfied' scores on a range of indicators for Bradford-upon Avon pre and post HLF restoration work

	1997	2001
Overall Upkeep	26	67
Condition of Towpaths	31	65
Provision of Information & Signage	16	50
Overall enjoyment	36	78

Though interesting in their own right, the above results raise the question as to whether the restoration has merely improved the satisfaction and enjoyment of those people who were already visiting the waterway, or whether there is any evidence to show the project has actually led to an increase in the numbers who visit - or at least in the number of visits which are made.

pedestrian counters along the towpath, which work through heat sensitivity. Over the past six months a network of 12 counters has been set up along the canal and a pilot scheme is underway to test whether information from these can be sent and stored by remote telecommunication systems. However the counters were not installed until 2003, so baseline data was limited.

Although we knew there was plenty of anecdotal evidence that visits had increased, this was a more difficult question to answer since it is harder to obtain good, reliable data for the number of people using a stretch of towpath or walkway during the course of an entire year. British Waterways has made considerable progress in tackling this issue by installing automatic

In the meantime, we used a less satisfactory method through a series of questions in the visitor surveys mentioned earlier. This indicated that visits to the canal increased by a minimum of 1.5 per cent in 2002 and by 3.9 per cent in 2001, clearly supporting the anecdotal evidence that visits are increasing. In total over the period since 1995, we estimate that visits

are increasing. In total over the period since 1995, we estimate that visits have increased by around 15%. (This is actually on the conservative side when compared with observed growth rates recorded elsewhere in the country, where more reliable pedestrian counter data is available.)

Estimates of change in boating and associated activity was much easier to assemble. British Waterways holds data on numbers of boats licensed by type. In the main category of boats involved, privately-owned powered craft, numbers based on the canal grew from 937 in 1995 to 1,251 in 2002, an increase of 34%.

Economic impact of canal recreation & tourism

The economic estimates of the recreation and tourism impacts of the scheme undertaken by Ecotec used two complementary approaches:-

Demand modelling

Over the last decade, British Waterways has developed a demand model to gauge the economic impacts of recreational visits to the canals in terms of additional local expenditure and employment. This is a multiplier-based model, which uses volume and value data. Visitor number estimates are combined with information on visit spend (from survey work) for different categories of canal user, both boating and towpath based. The model takes full account of economic issues associated with displacement and leakage to conform with government guidance on project appraisal.

ECOTEC used the model to estimate the recreation and tourism-related economic activity associated with the canal, with the conclusion that visitor spend within local economies had reached £26m a year by 2002, up 20% from 1995: £5m of this comes from boating and £21m from towpath visits. Total direct spend related to boating is estimated to have risen by 60% since 1995. In terms of employment, it was estimated that the canal now supports around 1,000 tourism and leisure jobs, 180 of which have been created since 1995. Arguably the scheme also sustained many of the jobs that were there pre-1995, since if it hadn't

taken place, navigation would no longer have been practical along long stretches of the canal and the towpath and associated visitor facilities would have fallen into disrepair. Therefore the restoration has also safeguarded over 700 tourism and leisure jobs, which would have been lost if the canal's future had not been secured.

Business survey

The demand modelling results were backed up by a survey of 600 leisure and tourism businesses located within the canal corridor - the largest and most comprehensive survey of its kind undertaken by British Waterways. Questionnaires were sent to all tourism and leisure related businesses located one mile either side of the canal in rural areas and within a quarter mile in urban areas.

The key messages from the survey were: -

- The canal corridor is home to a large number of relatively small businesses with few employees and a small annual turnover. However, there is evidence that, over the past few years, the majority of these businesses have grown in size. For example, 47% of respondents reported increases in staff numbers, and 81% noted that their annual turnover had grown.
- Some 58% of respondents described the canal as either 'very important' or 'important' to their business, suggesting that the waterway plays a significant role within the local tourism and leisure economy.
- The boating sector is well established and thriving, with direct employment equivalent to around 150 full-time jobs.
- 27% of respondents expect the canal to become increasingly important to them. Of all business types, off-waterway tourist attractions were the most positive about the future role of the canal, with 43% anticipating an increasing role for the canal.



Development Impacts

In a direct survey of changing business use along the canal corridor, Ecotec found that, since 1995, £350m has been invested in 23 commercial developments alongside the canal. 18 of these were on brownfield sites. Of the total:-

- £260m has been invested in 70,000 sq. m of new retail and office development;
- £80m has been invested in the development of over 1,000 residential units; and
- £10m has been invested in new tourism and leisure facilities.

These developments have led to over 2,500 jobs being created in new canal-side offices and shops, of which 233 are new to the local area. As previously mentioned, this investment and employment can't be attributed directly to the canal scheme. However other work has shown that canal-side sites are attractive to developers and act as "positive" factor in locational decisions. In the case of residential developments, this is reflected in enhanced values for waterside properties - a real economic driver. For retail and office schemes, there is evidence to show that properties can be sold on quicker, possibly due to environmental and aesthetic factors.

Although this type of impact is not directly related to

the recreation and tourism use of the waterway resource, it can be an important factor for waterway and other schemes requiring significant infrastructure investment. This is particularly the case where the development of the waterway and its corridor is viewed as an integrated whole.

Summary

In this paper we have shown how British Waterways is formulating more sophisticated ways of undertaking economic monitoring and evaluation. The approach is in line with official guidance such as the HM Treasury 'Green Book'¹ and the recent '3R's' guidance from ODPM²

We feel that it is important that economic evaluation is not viewed in isolation however. It should be thought of as just one element within a wider quality of life or sustainability indicator approach to recreation, social and environmental impact. Techniques are well-established for monitoring and evaluating change in the natural environment. Until recently social change has been neglected, certainly as far as regeneration, renewal and regional development projects - the so-called "3Rs" - are concerned. British Waterways has been working with other organisations, such as Groundwork and the Countryside Agency to pioneer approaches to appraisal and evaluation in the social field.

Finally it is important to think of the whole appraisal / evaluation process as an integrated system consisting of four basic stages:-

Design - including setting of objectives for types of outputs & outcomes that will be assessed. The purpose of the economic appraisal will often determine the types of outputs and outcomes that will be assessed and hence the methodology used;

Appraisal - in a recreation context this involves forecasting both demand and the impact of that demand in economic terms; in addition there is a feedback loop into other parts of the system, whereby the forecast outcomes may lead to changes in project design or delivery methods;

Delivery - as well as implementing the project, thought needs to be given as to how outputs and outcomes will be monitored, through a monitoring & evaluation plan;

Evaluation - which in turn can be used to give evidence for appraisals for future projects.

These approaches have been developed over the last three years, with refinements made during that time through our work on a wide range of projects across the UK in both rural and urban settings. To date, the methodology has mostly been used to present planned projects for external scrutiny and to review the achievements of publicly-funded restoration and regeneration work. More progress can be made in constructing indicators, though the greatest challenge ahead is now likely to be the maintenance of management systems which can consistently produce flows of both baseline and post-project data.

Footnotes

¹HM Treasury, 2003: *The Green Book: Appraisal and Evaluation in Central Government*

²Office of the Deputy Prime Minister, 2003. *Assessing the Impacts of Spatial Interventions: Regeneration, Renewal and Regional Development - Main Guidance.*

References

Ecotec Research & Consulting Ltd., "The Economic Impact of the Restoration of the Kennet and Avon Canal", British Waterways, 2003

Association of Inland Navigation Authorities (AINA), "Demonstrating the Value of Waterways: A Good Practice Guide to the Appraisal of Restoration and Regeneration Projects", AINA, 2003

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News

HORSE RIDING HOT SPOTS TO BOOST LOCAL WELSH ECONOMY

Forestry Commission Wales has been successful in its bid for a £624,000 Objective 2 European Funding grant to develop a suite of forest tourism projects, including new car parks and horse riding trails in Mid Wales to attract more visitors to Powys.

This project alone will cost an estimated £48,000 and provide a range of facilities for horse riders, delivering a significant boost to the emerging equestrian tourism industry in Powys.

The new facilities will include a car park and approximately 33km network of soft trails for long distance horse riding in Dyfnant Forest, for occasional users and organised endurance events. Waymarking for horse riders and carriage drivers will be provided for selected forest roads, making this project the first of its kind in Wales.

Richard Siddons, Forest District Manager, said, "FC Wales is leading the way in using expertise and knowledge to develop the forests throughout Wales for horse riders and tourists in order to increase visitor spend.

"In collaboration with our project partners -Dyfnant & Vyrnwy Horse Riding & Carriage Association, WDA and Antur Dwy Afon - FC Wales will design and implement the facilities which, when completed, will make the woodlands friendlier places for thousands of people to enjoy.

"Wherever possible, locally produced environmentally sustainable goods and services will be used, and it is envisaged that work will be generated for local

businesses and further opportunities arise for activity holidays and perhaps ornithological, botanical and wildlife safaris."

FC Wales began work on the horse trails late last year, for completion by mid-summer, and has already cleared existing vegetation, filled ruts, removed stumps and carried out drainage work. In some areas of poor ground, new sections of trail were built using stone to reinforce areas with low load bearing capacity. A forest shed was erected in January, to act as the main focus on event days, and a car park financed by the WDA was completed last year.

This latest project by FC Wales links in with the Welsh Assembly Government's strategy for horse tourism, 'Saddle up for Success', being implemented by the Wales Tourist Board and will create a safe environment for horse riders to enjoy the forests and give rural local businesses a boost.

FC Wales has already developed excellent horse trails and carriage drives in Dyfnant Forest, Mid Wales, and was recently presented with the prestigious Access Award by the UK's largest and most influential equestrian charity, the British Horse Society, in recognition of the huge contribution that FC Wales has made to equestrian access throughout Wales.

The suite of projects (new facilities at Lake Vyrnwy, new walks and facilities at Hafren and the source of the Severn and new facilities on the Kerry Ridgeway) will hope to attract more visitors to stay longer and spend more money in Powys.

The projects aim to improve the attraction of these areas as a tourist destination in order to generate economic, and tourist benefits to Powys

improvements will generate a sense of welcome to rural areas and attractions, and encourage visitor relaxation, enjoyment and purchasing of local products, goods and services.

More information on the woodlands of Wales can also be found on the Forestry Commission's website - www.forestry.gov.uk This project has been facilitated by a grant from the European Union.

THE COUNTRYSIDE AGENCY

EVERY CHILD MATTERS

Giving children in rural areas a SureStart

Around 700,000 children in rural areas live on the margins of poverty, but historically the needs of children in rural areas have been difficult to tackle and are often overlooked because they are dispersed and are living some distance from services and other help. In a report published on 3rd February the Countryside Agency shows ways in which SureStart, the government's programme aimed at children under four and their families, is helping some of these children.

Difficulties such as lack of suitable premises, few existing resources (including trained and experienced staff) and the additional time and costs involved in working in remote locations means that more creative and flexible solutions are required if needy rural children are to benefit from the programme.

Working with the Department of Education and Skills and the Department for the Environment, Food and Rural Affairs, the Countryside Agency has helped to "rural proof" the SureStart programme, so that it can be delivered effectively in rural areas.

The report, *'Delivering Effective Services to Children and Families in Rural Areas: the early lessons from SureStart'*, demonstrates some of the solutions adopted and how they are overcoming the problems of providing a much-needed resource to a scattered population of disadvantaged children and families.

Speaking in York, at the first in a series of conferences aimed at finding ways of improving services for children and families in rural areas, Margaret Clark, director of the Countryside Agency said "Children in rural areas need a good start in life, but they often find it difficult to access important services. We must remember that not everyone lives within walking distance of a school, doctors surgery or library. This report shows how, by thinking rural and developing imaginative ways of reaching those in need, national programmes such as SureStart can be delivered effectively in rural areas. For example, the mobile toy library in Berwick and improved community facilities in Berrynarbor which has meant a new Tumble Tots exercise session for children under four, demonstrates the success of a more flexible approach".

The report, *'Delivering Effective Services to Children and Families in Rural Areas: the early lessons from SureStart'*, (CA151) was written by the National Council of Voluntary Child Care Organisations (NCVCCO). Copies can be downloaded at www.countryside.gov.uk or obtained from Countryside Agency Publications, PO Box 125 Wetherby, LS23 7EP, Tel 0870 120 6466.

TOURISM IRELAND

More Way Marked Ways in Northern Ireland for 2004

There are five new Way Marked Ways planned for 2004 in Northern Ireland spanning from the rugged Sperrins to the Mountains of Mourne. The new Way Marked Ways will be added to the trail that already stretches from the stunning Causeway Coast Way to the lush meadows of County Fermanagh. www.waymarkedways.com (site is currently under reconstruction).

Plans for Northern Ireland's First National Park Underway

The Mourne Heritage Trust has recently announced plans to develop Northern Ireland's first National Park. This is great news for walkers - providing a designated

area of natural beauty to explore. The Mourne Heritage Trust is part of the £15 million investment from the Natural Resource Rural Tourism (NRRT) initiative. www.rdpni.gov.uk

THE NATIONAL FOREST

WHAT'S GOOD FOR THE RAINFOREST IS GOOD FOR THE NATIONAL FOREST

The National Forest Company (NFC) has secured certification status from the Forest Stewardship Council (FSC) for its woodland at Heather, Leicestershire. It is the first NFC owned site to achieve certification.

Woodland certification means that woodland has been independently inspected and evaluated according to strict environmental, social and economic principles. In the UK there is now in excess of 1.1 million hectares (over 2.7 million acres) of woodland certified under the Forest Stewardship Council (FSC) certification system. On a global scale the amount of FSC certified woodlands exceed 39 million hectares.

The woodland at Heather covers 11.20 hectares. It comprises of a mix of recently planted broadleaved woodland (oak, ash, silver birch amongst other species), existing broadleaved woodland and open land. It has full public access and the wood has been designed to encourage recreation whilst high quality timber is a long-term goal.

Dr Hugh Williams, Incentives & Land Management Officer, NFC, commented: "The NFC is delighted that Heather has achieved certification status. The NFC regards certification as a demonstrable and important link with the overreaching concepts of sustainability, quality and marketing of The National Forest. The use of certification also reinforces the NFC's guiding principle of creating a sustainable forest and is an exemplar of best practice."

The NFC is seeking to encourage other woodland

owners within the Forest to seek certification. The Woodland Trust, Forest Enterprise and Rangemore Estate already own certified sites within the Forest.

For further information contact Carol Rowntree Jones, Media Relations Officer, or Dr Hugh V. Williams, Incentives & Land Management Officer, at The National Forest Company, on 01283 551211. For background information please visit www.nationalforest.org.

YOUR RIVERS FOR LIFE

ENVIRONMENT AGENCY

The Agency launched its Navigation Strategy at the London International Boat Show held at the new exhibition centre at Excel in London Docklands in January. The Strategy, which was subject to much public consultation, was launched by Alun Michael, MP and Minister for Inland Waterways and was attended by over 100 people. It sets out an ambitious programme of new projects and upgrading of facilities on river navigations such as the Thames, Great Ouse and Medway. Entitled 'Your Rivers for Life' the strategy sets out for the first time an integrated plan for the development of the Agency's navigation business. 'We want to develop our rivers so they offer facilities comparable with the best in Europe' said Barbara Young, Chief Executive of the Environment Agency. 'Our rivers are cleaner than they have ever been, and provide wonderful opportunities for leisure and relaxation'. 'Yet too often the boater, rower, sailor, walker or just the casual visitor finds it more and more difficult to access the river and is faced with disappearing marine and leisure facilities as well as an ageing infrastructure. Rivers used to be the lifeblood of communities, and we would like to see them return as a focus for social, economic and environmental improvement.' More information can be found on the Agency's website at

<http://www.environment-agency.gov.uk/subjects/navigation/632663/>

TOWPATH SOLUTION TO DOG POLLUTION

British Waterways will install 1000 dog waste bins with free dog waste bag dispensers at popular waterway access points across the country.

As part of the drive to improve the enjoyment of its network of 2,000 miles of canals and rivers, this winter The project has been guided by recent research undertaken by Encams, the environmental campaigner, which estimates around 60 per cent of the dog owning public (4.6million adults) let their dogs foul in public open spaces and one of main reasons they don't clear up after their dog is the lack of a convenient and safe means of disposal.

Working with specialists JRB Enterprises, over the next three months British Waterways staff will be contacting their local authorities to arrange waste collection programmes and subsequently install the bins.

British Waterways already works in partnership with a number of local authorities across the country to provide dog waste bins for its visitors. This national campaign aims to increase the number of partnerships and provide facilities at more waterside locations.

Stewart Sim, British Waterways' technical director, explains: "Over 10 million people already make 160 million visits to our waterways each year to enjoy their unique blend of heritage, wildlife and leisure benefits. People visit by boat, on foot, on bikes, for fishing or to exercise their dogs. We welcome responsible dog owners to our towpaths but dog mess is consistently one of our biggest customer complaints so we've identified the most popular and problematic access points across our network to install dog bins, providing an important facility for our customers with dogs and helping to keep the waterways special for all.

"Dog mess is not only unpleasant for visitors to the waterways and British Waterways bank staff, it also presents a health risk - especially to children. We

hope all the local authorities we will be contacting over the coming months will welcome this initiative and help us to dispose of the waste and help keep the waterways special."

In 2001, British Waterways and JRB Enterprises worked with Stockport Metropolitan Borough and Macclesfield Borough councils to trial the new easy-to-use dog waste bins on seven dog fouling trouble spots in Stockport and two in Macclesfield.

Heather Rowley, British Waterways' leisure development officer, explains: "Dog fouling along canal towpaths can be a real hazard so we decided to pilot the installation of dog bins to help make our towpaths greener and cleaner for the public and our staff. The units have proved very popular and we have noticed a distinct improvement in the trial areas. British Waterways and the two councils have received extremely positive feedback from towpath visitors about the scheme calling for the dog bins to be installed in other areas."

For further information about the project, please contact John Bright at JRB Enterprises on 0161 439 2080 or email info@jrbenterprises.com

SHELTER CHALLENGE TO TAKE YOU TO NEW HEIGHTS

Fancy escaping routine and experiencing an alternative weekend in the great outdoors?

If so Shelter's Three Peaks Challenge could be for you. The UK's leading housing charity is looking for people with a sense of adventure and zest for nature to take part in its annual Three Peaks Challenge. For this tough test of stamina, you will have to climb each of Scotland, England and Wales's highest mountains (Ben Nevis, Scafell Pike and Snowdon) in one weekend (Friday 4th Sunday 6th June).

"This is not a jog down the high street," said Alan Gosschalk, Shelter's Director of Fundraising, "but it is great fun. It is certainly very scenic - the mountains will definitely take your breath away - and when it gets

tough you and your team will have the added motivation of knowing that every step you take will contribute to Shelter's vital work with homeless and badly housed people. Shelter's last Three Peaks Challenge raised enough money to help over 1,500 families in a housing crisis, and this year we hope do even better."

The challenge starts now. You will need to form a team of between four and six and raise at least £1,100 in sponsorship between you. For more information or to sign up call 08457 458 45900, visit the website www.shelter.org.uk/threepeaks, or email send-for-it@shelter.org.uk

NEW GUIDANCE HERALDS START OF "SAVE THE HOUSE SPARROW"

A new guidance leaflet "House Sparrows in Great Britain" funded by Defra and produced in partnership with the RSPB and British Trust for Ornithology heralds the start today of an initiative to encourage people to create suitable habitats to increase the numbers of the treasured British House Sparrow.

Guidance comes as part of a House Sparrow Conference hosted by Defra. The conference, in London on 9th February will bring together current knowledge of House Sparrow populations and demographics.

Research funded by Defra in 2002 and undertaken by a consortium led by the British Trust for Ornithology and included the RSPB, Oxford University, the Central Science Laboratory, and WildWings Bird Management, found that:

- House Sparrow numbers over the last 30 years have fallen from 12 million pairs to fewer than 7 million pairs;
- Suburban and urban gardens have seen the most marked decline;
- 60% of House Sparrows are found in rural and urban gardens;
- Breeding has been more successful on farmland;
- Increases in breeding performance have

been least in South East England where populations have declined most rapidly;

- Increases in breeding performance have most rapid in the North and West where some populations have increased; and
- A drop in the adult survival rate and poorer breeding success in suburban habitats in the South East of England is blamed for the overall decline in sparrow numbers.

Minister for Nature Conservation, Ben Bradshaw, said: "The friendly chatter of sparrows is a much loved part of British life. This is a very dramatic decline but it is not irreversible. If we all play our part the population of this treasured bird can be increased. The leaflet we are launching today provides effective proactive advice on how individuals and communities can improve the habitat in their local area by making it house sparrow friendly. Through these actions I hope we can begin to redress the balance and allow these birds which we all know and love to thrive once again."

British Trust for Ornithology House Sparrow Officer, Rosie Cleary, said: "The disappearance of house sparrows seems to be connected to the way we build our houses and the ease with which birds can find food. The situation is becoming critical in London, but there are large numbers of gardens across the UK from which house sparrows have disappeared. We need help from both people who still have house sparrows and, probably more importantly, from home owners who have lost them."

The leaflet House Sparrows in Great Britain has been funded by Defra and produced in collaboration with the RSPB and the BTO. Copies of the leaflet can be obtained from: Jamie Harwood, Wildlife Integration & Conservation Team, European Wildlife Division, Floor 1 Zone 10/D, Temple Quay House, 2 The Square, Temple Quay, Bristol, BS1 6EB
Tel 0117 372 8312 Fax 0117 372 8182
Email jamie.harwood@defra.gsi.gov.uk
Or from the Defra website at <http://www.defra.gov.uk/wildlife-countryside/ewd/index.htm>

THE COUNTRYSIDE AGENCY

MORE THAN JUST A GATEWAY?

A vision for the rural urban fringe

Hundreds of acres of land between the countryside and towns are underused and overlooked, according to the Countryside Agency and Groundwork. Around each urban area there is a hinterland comprising up to 20% of our total land area that should be a place for our children to play in, a place to improve our health, grow local food and provide sustainable jobs.

We need politicians, local communities planners and businesses to grab the opportunity to create a vision for the future of the rural/urban fringe and have subsequently launched a consultation on that vision for the land and countryside immediately around towns.

Pam Warhurst, deputy chair of the Countryside Agency said: "It is a common misconception that there is a clear distinction between the countryside - green fields, hedgerows, hills and woodlands - and towns and cities. In reality the two often blur around the edges in a distinctive zone of horse pastures, public utilities such as electrical substations and struggling agriculture.

"This consultation gives us an opportunity to consider what the rural/urban fringe could mean to the people who live, work and visit there, and how to achieve the best social, economic and environmental benefits from this often overlooked resource."

Rural Affairs Minister Alun Michael welcomed the vision document: "The countryside around our towns is an important environment for today's generation and a rich asset for future generations provided we get the planning right. We need to get rid of the outdated idea of a rural/urban divide because we need each other. We need to understand the interdependencies and promote the concept of sustainable development as the key for both urban and rural areas and where better to start than with the urban/rural fringe.

"That fits well with the Rural White Paper: a vision for a countryside, more diversified than in the past in which the links between town and country are strong and healthy. A vision for the rural/urban fringe takes this a step further by providing a template for combining local environmental, social and economic priorities to create more attractive surroundings and recreational opportunities and generate more income, from a wider range of sources, for land managers and others who depend upon the fringe for a living."

Tony Hawkhead chief executive of Groundwork said "One of the greatest challenges we face as a nation is learning to live more sustainably. This means ensuring that our urban centres develop in harmony with the environment that surrounds them. The rural urban fringe has enormous potential to help us meet the needs of the present - for local food, recreation, renewable energy and education - while changing the way we live in the future. It is also the bridge that connects our towns and cities with the countryside we love.

"Groundwork has been helping regenerate the rural urban fringe for more than 21 years. Now is the time for us to work together to unlock the full potential of this valuable resource."

Responses to this consultation will help shape the final version of the vision to be launched in mid 2004, followed by further work to stimulate the changes necessary to make the vision a reality. The closing date for responses is 30th April 2004.

The vision document and a questionnaire for submitting responses are available by emailing rufconsultation@groundwork.org.uk, or from www.groundwork.org.uk/policy/rufconsultation

ACCESSIBILITY OF WOODLANDS AND NATURAL SPACES: ADDRESSING CRIME AND SAFETY ISSUES

A one day seminar to be held at: Woburn House, London on Wednesday 2 June 2004

Forest Research is organising the event in partnership with the Forestry Commission, English Nature, Cabe Space and Lancashire Constabulary.

Improving the accessibility of woodlands and natural spaces is seen as a key issue for organisations such as the Forestry Commission as these places can provide a wide range of benefits and people value them for a variety of different reasons. In order to do this we need to address issues such as anti-social behaviour, people's perceptions of risk and safety, and concerns about landowners liability relating to public access.

In making woodlands and natural spaces accessible to all there are recognised and emerging ways of dealing with current problems using innovative approaches which might involve education, community involvement, design, and rehabilitation. Such spaces offer many opportunities for community involvement, health improvement and community activities while familiarising people with their local environment, and providing challenges and adventure.

Our key objectives

Discuss and explore the issues as outlines below and the relationships between these them.

Explore the potential for developing future networks and partnerships to share good practice with environmentalists, those interested in anti-social behaviour and crime reduction, practitioners, researchers, planners and designers.

Assess and define research needs to address the questions raised.

Publish a report from the seminar which outlines the main areas of discussion and identifies future research.

Structure of the day

The morning will set the scene with examples of

current practical work and research. Afternoon workshops will allow participants to explore and debate current issues of importance in this subject area.

Subject areas

Anti-social Behaviour
Perceptions of risk and safety
Challenge and liability

Who should attend

Planners; housing associations; regeneration and community development practitioners; environmental groups; land managers; land owners; natural space staff; policy makers; researchers; police and crime reduction units; youth offender and probation services

Numbers for the conference are limited and places will be given on a first come, first served basis.

Presenters

We are aiming to involve speakers from a wide range of organisations such as the Forestry Commission, English Nature, Universities and Colleges, Forest Enterprise and Local Authorities

For information on the content of the seminar please contact:

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Email: Liz@centrevents.co.uk

Countryside Recreation and Training Events

APRIL 2004

6 April 2004
GETTING LOCAL PEOPLE ACTIVE AND INVOLVED
 (Environmental Trainers Network)
 Venue: Manchester
 Cost: £100/150 + VAT

20-23 April 2004
NATIONAL PARKS STAFF INDUCTION COURSE
 (Plas Tan y Bwlch)
 Venue: Gwynedd
 Cost: £30

22 April 2004
URBAN PARKS - DEVELOPING EDUCATION & COMMUNITY USE
 (Environmental Trainers Network)
 Venue: Birmingham
 Cost: £100/£150 + VAT

MAY 2004

11-13 May 2004
INTERPRETIVE MASTER PLANNING
 (Plas Tan y Bwlch)
 Venue: Gwynedd
 Cost: £252

13 May 2004
ENVIRONMENTAL GRANTS WORKSHOP - MEET THE FUND MANAGERS
 (Environmental Trainers Network)
 Venue: London
 Cost: £100/£150 + VAT

17 - 19 May 2004
RIGHTS OF WAY IMPROVEMENT PLANS
 (Losehill Hall)
 Cost: £436

19 May 2004
A CREATIVE APPROACH TO ENVIRONMENTAL INTERPRETATION
 (Environmental Trainers Network)
 Venue: Manchester
 Cost: £100/£150 + VAT

19-21 May 2004
URBAN GREENSPACE MANAGEMENT
 (Losehill Hall)
 Cost: £516

24 May 2004
INVOLVING CHILDREN IN THE ENVIRONMENT
 (Environmental Trainers Network)
 Venue: Leeds
 Cost: £100/£150 + VAT

25 May 2004
ENVIRONMENTAL ISSUES & SUSTAINABILITY - TIPS AND TECHNIQUES FOR RAISING AWARENESS & DEVELOPING COMMITMENT
 (Environmental Trainers Network)
 Venue: London
 Cost: £100/£150 + VAT

27 May 2004
ENVIRONMENTAL AWARENESS CERTIFICATE
 (Field Studies Council)
 Venue: Derrygonnelly, West Fermanagh

26 May 2004
MARINE EDUCATION - AT THE COAST AND INLAND
 (Environmental Trainers Network)
 Venue: London
 Cost: £100/£150 + VAT

JUNE 2004

2 June 2004
ACCESSIBILITY OF WOODLANDS AND NATURAL SPACES
 Venue: Woburn House, London

Contact details for training/events organisers

Environmental Trainers Network
 Tel: 0121 358 2155
www.btcv.org/etn/

Field Studies Council
 Tel: 01743 852100
www.field-studies-council.org

Losehill Hall
 Tel: 01433 620 373
www.losehill-training.org.uk

Plas Tan y Bwlch
 Tel: 0871 8714004
www.eryri-npa.co.uk/ptyb_base/e_800.html

CRN EVENTS 2004

June 2004
INTERPRETATION OF SITES
 Venue and date to be confirmed

October 2004
VISITOR RISK MANAGEMENT AND LIABILITY
 Venue and date to be confirmed

November/December 2004
MAKING LINKS BETWEEN HUMAN HEALTH AND COUNTRYSIDE RECREATION
 Venue and date to be confirmed

Countryside Recreation Network Publications List

	Price (incl.postage)	Tick
REPORTS		
Social Exclusion in Countryside Leisure in the United Kingdom - the role of the countryside in addressing social exclusion (2001)	£10	<input type="checkbox"/>
CONFERENCE PROCEEDINGS		
Removing Barriers; Creating Opportunities: Social Inclusion in the Countryside (2001)	£15	<input type="checkbox"/>
Managing the Challenge of Access (2000)	£15	<input type="checkbox"/>
Is the Honeypot Overflowing? (1998)	£15	<input type="checkbox"/>
Making Access for All a Reality (1997)	£15	<input type="checkbox"/>
Today s Thinking for Tomorrow s Countryside (1995)	£15	<input type="checkbox"/>
Communities in their Countryside (1994)	£15	<input type="checkbox"/>
WORKSHOP PROCEEDINGS		
Demonstrating the Economic Value of Countryside Recreation (avail. May 2004)	£12	<input type="checkbox"/>
Accessible Greenspace (2003)	£12	<input type="checkbox"/>
Country Parks II (2003)(Country Parks I & II can be purchased together for £20)	£12	<input type="checkbox"/>
Country Parks I(2003)	£12	<input type="checkbox"/>
Public Rights of Way Improvement Plans (2002)	£8	<input type="checkbox"/>
Funding for Social Projects (2002)	£8	<input type="checkbox"/>
Opening Up Access In and Around Towns (2002)	£8	<input type="checkbox"/>
Visitor Payback Schemes (2002)	£8	<input type="checkbox"/>
Local Access Forums (2001)	£8	<input type="checkbox"/>
Fundraising and the Lottery (2001)	£8	<input type="checkbox"/>
Are We Getting There? Delivering Sustainable Transport in the Countryside (2000)	£8	<input type="checkbox"/>
Breaking New Ground in Sustainable Tourism (2000)	£8	<input type="checkbox"/>
Using Local Distinctiveness as an Economic Development Tool (1999)	£8	<input type="checkbox"/>
Just Walking the Dog (1999)	£8	<input type="checkbox"/>
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Making Ends Meet (1997)	£8	<input type="checkbox"/>
GIS & Countryside Management - Theory and Application (1997)	£8	<input type="checkbox"/>
Access to Water - Sharing Access on Reservoirs and Rivers (1997)	£8	<input type="checkbox"/>
Do Visitor Surveys Count? - Making use of Surveys of Countryside Recreation (1996)	£8	<input type="checkbox"/>
Consensus in the Countryside II (1996)	£8	<input type="checkbox"/>
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A Brush with the Land - Art in the Countryside I (1995)	£8	<input type="checkbox"/>
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Sport in the Countryside (1995)	£8	<input type="checkbox"/>
A Drive in the Country? - Examining the Problems of Recreational Travel (1994)	£7	<input type="checkbox"/>
Environmental Economics, Sustainable Management and the Countryside (1994)	£6	<input type="checkbox"/>
CRN RESEARCH DIRECTORY An annual directory of the research work carried out by the CRN agencies during the year		
Research Directory 1998	£5	<input type="checkbox"/>
Research Directory 1997	£5	<input type="checkbox"/>
Research Directory 1996	£2	<input type="checkbox"/>
Research Directory 1995	£2	<input type="checkbox"/>
UK Day Visits Survey 1994 (1996)	£15	<input type="checkbox"/>
UK Day Visits Survey 1993 (1995)	£15	<input type="checkbox"/>

Title:_____ First Name:_____ Surname:_____

Address:_____

_____ Postcode:_____

E-mail:_____ Tel:_____

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