

Countryside Recreation Network News



ISSN 0968-459X Volume 21, Spring 2013

In this issue...
Growing the Outdoor Economy Conference Proceedings

About the Countryside Recreation Network (CRN)

CRN is a membership organisation comprising representatives from government departments, agencies and other organisations with a role in outdoor recreation.

The Network's members meet quarterly to discuss outdoor recreation matters and share best practise, as well as working collaboratively on research and other projects.

To communicate with its wider subscriber-based audience, CRN publishes journals, hosts conferences and seminars, and issues e-newsletters. This is coordinated by the Network's management team and secretariat, the latter of which is staffed on a part-time basis.

The Network's key aims are to:

1. Encourage cooperation between members in identifying and promoting the need for research related to outdoor recreation, to encourage joint ventures in undertaking research and to disseminate information about members' recreation programmes.
2. Promote information exchange relating to outdoor recreation and to foster general debate about relevant trends and issues.
3. Share information to develop best practice through training and professional development in provision for and management of outdoor recreation.

Write for the CRN Journal

If your organisation is doing something innovative, inspiring or groundbreaking in the field of outdoor recreation, we'd love to chat to you about becoming an author for our journal.

To discuss writing for a future edition of the CRN journal please contact our secretariat.

Author guidance and the Network's editorial policy is available on our website at www.countrysiderecreation.org.uk/publications

Contents

02	Welcome & Introduction
03	Speaker Biographies
06	Article 1 - Growing Outdoor Recreation through the downturn Jerome Mayhew, Managing Director, Go Ape How is it that Go Ape's most financially successful years have occurred during the current recession? This article looks at the organisation's key responses to the downturn and will explain how various aspects of Go Ape's business model have allowed it not only to survive but to prosper.
09	Article 2 - Growing Rural Tourism and the Outdoor Economy Lyndsey Swift, Head of Strategic Partnerships, Visit England This article draws on the latest national trends, sets out the challenges and opportunities for the outdoor economy to grow and contribute to the growth of the wider visitor economy, and highlights the good work internationally and locally to ensure this opportunity is realised.
13	Article 3 - Future Funding Opportunities Ruth Coulthard, Funding Development Manager, Brecon Beacons National Park This article offers an insight into the Walkers are Welcome concept - an innovative community-led scheme which gives communities a framework to deliver an excellent walking product to visitors to their town, and a badge with which to market it.
16	Article 4 - The role and significance of the outdoor economy for delivering growth and jobs Neil Ravenscroft, Professor of Land Economy, University of Brighton Using a number of case studies in the UK and elsewhere, this article introduces an alternative, associative approach to developing sustainable outdoor economies that deliver jobs and growth.
20	Article 5 - Welcoming Walkers - using the Walkers are Welcome model to help grow the outdoor economy Pippa Langford, Programme Manager - Delivery Improvement Programme, Natural England Comprehensive article outlining the future funding picture for rural businesses, paths and infrastructure
23	Article 6 - Economic Impact of Mountain Biking in Scotland Graeme McClean, Project Manager, Developing Mountain Biking in Scotland Article presenting the journey which Scottish mountain biking has travelled to become a key sector for economic growth in Scotland. From the realisation of the importance of Outdoor recreation brought about by Foot and Mouth to the creation of the 7stanes trail centres, through to the world's first strategic framework for mountain biking and the creation of a national project.
26	Article 7 - How can the public sector help stimulate economic growth. Case Study: The Helix, Falkirk Richard Millar, Head of Enterprise, Scottish Canals Two hundred years ago, the Scottish Canals were a powerhouse of the Industrial Revolution generating huge wealth for the few but contributing to some serious social problems for the many. Richard's article explains how these same canals can and have been revitalised and reinvented. Catalysts for innovative and ambitious projects, they help create new economic growth and positive social and environmental change across Scotland in harmony and equal measure.
29	Article 8 - The economic value of outdoor recreation in Northern Ireland Mike McClure, Outdoor Recreation Development Officer, Sport Northern Ireland – based on the conference presentation by Chris Gratton, Professor of Sport Economics and Director of the Sport Industry Research Centre (SIRC), Sheffield Hallam University. This article outlines the results from a recent study which utilized the National Income Accounting approach to estimate the economic benefits of the Outdoor Recreation Sector in Northern Ireland.
32	The Outdoor Industries Association (OIA) attends the CRN conference
33	Conference Workshop Feedback Session
35	Countryside Jobs Service Advertorial

Executive Members



Support Members



Management Team

Chairman Jo Burgon
 Vice Chair Mike McClure, Sport NI
 Finance Officer Wendy Thompson, Natural England
 Research Office Fran Pothecary, Scottish National Parks
 Events Officer Glenn Millar, British Waterways
 Communications Officer Vacant

Contact

www.countrysiderecreation.org.uk
kathryn@countrysiderecreation.org.uk
 0044 (0)28 9030 3937

Staff (part-time)

Secretariat Kathryn Callaghan, CRN
 Accounts Sylvia Watson, CRN





Countryside Recreation Network

Welcome and Introduction

Growing the outdoor economy Outdoor recreation as a catalyst for economic growth



This special edition of the CRN journal has been prepared to share the proceedings from the CRN 2013 conference - Growing the outdoor economy.

One of the major challenges facing the UK is the current economic crisis and generating recovery is likely to be a Government priority for years to come. The title of the conference suggests that outdoor recreation has a role to play in this recovery and this premise was explored further by a range of speakers, representing commercial and social enterprise, government organisations, voluntary and public sector partnerships and academic institutions. Their ideas, suggestions, challenges and inspiring stories were presented to the conference and each has prepared an article for this journal to share with the Countryside Recreation Network.

A personal perspective from Jerome Mayhew, Managing Director for the successful GoApe enterprise, set the scene for the conference. Jerome was grateful to the Forestry Commission for its belief in the GoApe concept and for supporting the business by making land, and trees, available. He argued that government bodies should be encouraged to take more risks in supporting private business. The second presentation by Lyndsey Swift introduced headlines from the Visit England Strategic Framework for Tourism with plenty of ideas for growing rural tourism and why this was important.

Pippa Langford drew attention to opportunities that could influence the Common Agricultural Policy to support outdoor recreation related tourism particularly where this delivered benefits to local communities in rural areas. Professor Neil Ravenscroft recognised the significance of the outdoor economy but also identified the challenge of delivering impact at the local level. He introduced the 'Associative Economy' as a means to achieving this.

Three case stories highlighted the importance of a good quality and attractive destination. Walkers are Welcome has developed a brand which symbolises quality for walkers and which is delivering direct benefits to small market towns. The development of 7stanes has made Scotland an international destination for mountain biking attracting both experienced and family off-road cyclists with noticeable economic benefits. Investment in the Scottish canal network has created the Falkirk Wheel and the Helix as new tourist destinations with impressive spin-offs to the local economy. All took pride in enhancing the natural environment and our historic and cultural heritage as well as improving access for people to enjoy it.

Many of the speakers presented figures on the estimated value of outdoor recreation to the economy. The final presentation by Sheffield Hallam University shared the early findings from a study of the economic value of outdoor recreation in Northern Ireland which provided some thoughts and ideas on methodology.

A common theme through-out the day was how to raise the profile of the sector and share the evidence. A key recommendation, which is highlighted in the conference summary at the end of this journal, is that a unified voice is needed to support and advocate growth of the outdoor economy. I am sure this will be something the Countryside Recreation Network members will wish to develop further in partnership with the wider CRN network and organisations closely aligned to this ambition.

I hope you enjoy reading the conference proceedings and that you are also inspired to work with CRN members to create a voice for the outdoors.

Wendy Thompson
CRN Member, Conference Journal Editor

Growing the Outdoor Economy: Speaker Biographies

CRN conference 06.03.13



Jerome Mayhew, Managing Director, Go Ape

Until 2006 Jerome worked for 10 years as a barrister specialising in personal injury litigation. He joined Go Ape in 2006 as Director of Business Development and Risk and became Managing Director in 2009. The Go Ape vision is to create adventures and to live life adventurously. Part of Jerome's role is to make sure that the health and safety environment continues to allow the provision of adventurous activity.



Neil Ravenscroft, Professor of Land Economy, University of Brighton

Dr Neil Ravenscroft is Professor of Land Economy at the School of Environment & Technology at the University of Brighton. He has, for many years, undertaken research on local economic and social activity, particularly related to outdoor recreation and access to the countryside of England and Wales. He was part of the team that developed the Environment Agency's strategic approach to water related recreation in Wales and many of the former regions of England. More recently he was a lead author on the role of cultural ecosystem services in the National Ecosystem Assessment (NEA), and he is currently working on NEA follow-up projects that seek to develop new economic thinking about the outdoor economy of the UK, and on a project for the Canal and River Trust, on identifying the size and role of the social economy in Northern Europe. Professor Ravenscroft is also a Director of Tablehurst Community Farm in East Sussex, England, a large and diversified community-owned business that typifies new employment-led approaches to underpinning localised outdoor economies.



Ruth Coulthard, Funding Development Manager, Brecon Beacons National Park Authority

Ruth Coulthard is the Funding Development Manager for the Brecon Beacons National Park Authority, responsible for diversifying the range of funding and income streams for the Authority to help it carry out its work, and also build relationships with partner organisations to maximise limited resources. Before this, Ruth looked after the promoting enjoyment and understanding area of the National Park's work including education, interpretation and information, a perfect environment to understand the growing need to develop a more diverse range of funding options in order to finance the Authority's work in the future! Ruth first became aware of the Walkers are Welcome Concept when working on a cross border initiative to develop walking tourism along the Offa's Dyke Corridor. The initiative was the perfect way to deliver the economic development outcomes required for the project and engaging local communities. Taken with the scheme and the enthusiasm of the national committee, in her spare time Ruth began developing an accreditation bid for her home town of Abergavenny. She also recently became a voluntary member of the scheme's committee and is fortunate to be working with them to help take forward this concept nationally.



Lyndsey Swift, Head of Strategic Partnerships, Visit England

Lyndsey Swift is Head of Partnerships at VisitEngland - the National Tourist Board for England. Lyndsey drives forward industry implementation of the Strategic Framework for Tourism in England - the first tourism strategy for England in ten years. She also manages VisitEngland's relationship with Local Enterprise partnerships and key strategic partners who impact on the visitor economy including trade associations, local government and other agencies. Lyndsey's career has its roots in local government, having previously programme managed the Local Government Association's lobbying work on culture, tourism, sport, transport and regeneration. She was senior policy advisor in the Local Government Strategy Unit at the Department for Communities and Local Government, driving forward the 2006 Local Government White Paper and has worked at the corporate centre of three local authorities, supporting the Leader of the Council and cabinet members.

Contact

Wendy Thompson
Principal Adviser, Access Grants and Delivery
Natural England
Wendy.Thompson@naturalengland.org.uk



Pippa Langford, Programme Manager – Delivery Improvement Programme, Natural England

Pippa has worked for Natural England and its predecessor, the Countryside Agency, for over 8 years. At the Countryside Agency she advised on the previous RDPE and its impact upon the countryside. Since Natural England was formed she has worked on other projects such as Access to Natural Greenspace and Coastal Access. More recently she managed the People and Access Team of around 100 staff: this team delivers the National Trails programme, Coastal access, open access, the Natural Connections project, and Paths for Communities. Currently Pippa is working on a project to improve local delivery for the whole of Natural England.

Prior to working at the Countryside Agency, Pippa was Director of Wildlife and Countryside Link for a couple of years. She worked on a wide range of environmental issues but in particular, represented the NGOs at Ministerial Round table meetings about CAP reform. Before this Pippa was a Senior Lecturer in Rural Policy and Bishop Burton College in Yorkshire for 12 years: this included developing a specialism in countryside recreation. In her spare time, Pippa enjoys gardening and walking with her family both in the UK and within Europe.



Richard Millar, Head of Enterprise, Scottish Canals

Richard Millar is Head of Enterprise at Scottish Canals. He is responsible for promoting marine and visitor tourism, stimulating commerce and social enterprise on the canals, developing new access and interpretation and establishing links between the canals, as linear parks, and the wider countryside and waterways. Richard is also responsible for fundraising, marketing, events and promoting active living on the canals as well as overseeing The Falkirk Wheel.

Richard is the Scottish Canals lead on The Helix project, which was awarded £25 million by the BIG Lottery Commission in November 2007, the largest single Living Landmarks award made at the time. An engineer by trade, Richard joined Scottish Canals in 1999 when he was involved in the £83.5m Millennium Link Project to reopen the Lowland canals, then the largest canal restoration ever to take place in the UK. The canal extension and sealock at the Helix complete the aspirations of the Millennium Link Project by taking the canal back to its birthplace in Grangemouth.



Chris Gratton BA(Econ), MA(Econ), PhD, Professor of Sport Economics and Director of the Sport Industry Research Centre (SIRC), Sheffield Hallam University

Chris Gratton is Professor of Sport Economics and Director of the SIRC at Sheffield Hallam University, UK. He currently has six academic sports books in print, the latest being *The Global Economics of Sport*, published in 2012. Chris's main areas of research include: the economic benefits of major sports events; measuring the economic importance of sport including the use of satellite accounts for sport; and the analysis and modelling of large sports participation surveys. He has represented the UK on the EU Workshop on Sport and Economics from 2006 to 2011 and continues to represent the UK on the EU Expert Group on Sport Statistics.



Graeme McLean, Project Manager, Developing Mountain Biking in Scotland

Graeme is the Project Manager for Developing Mountain Biking in Scotland. He is passionate about his role and believes the project can make significant improvements to mountain biking in Scotland and enhance our worldwide reputation for providing sustainable mountain biking.

The project supported Tourism Intelligence Scotland (TIS) in creating a mountain biking guide for tourism businesses and brought this guide to life with workshops attended by over 80 businesses. He has also initiated several research projects into the contribution mountain biking makes to the Scottish economy and has a unique overview of mountain biking in Scotland.

He has worked in sport and activity in various roles within the public, private and voluntary sector since 1995. Having qualified as a Trail Cycle Leader he has seen first hand the enjoyment and satisfaction that introducing mountain biking into people's lives brings. He would like to keep learning more about his environment, drop into a 6ft wave, lower his golf handicap to under 10 & ride the World Cup

Growing outdoor recreation through the downturn

Jerome Mayhew, Managing Director, Go Ape



The theme of this conference has been to set the growth of outdoor recreation within the context of the economic downturn. For my part I see no specific connection between the types of economic growth associated with outdoor recreation and the particular problems highlighted by the recession. However, running a business through a prolonged and deep recession has taught me some lessons about history and economics.

A key lesson for me has been the truth that, whilst statistics are not supposed to lie, they can certainly mislead. As a student I read about the great depression of the 1930s: high levels of unemployment, social deprivation and economic decline. I have sometimes wondered how leisure businesses such as the one I manage could have survived in those conditions: people had no money, no jobs and no hope. But we now live in a recession that is, apparently, just as deep and even longer than that endured in the early 1930s and yet Go Ape as a business has been able to thrive. How is this?

The rather obvious answer is that a large society such as the UK is made up of a conglomeration of individual experiences and circumstances. Whilst it is true that, statistically, the number of households in sufficiently severe financial circumstances to prevent them from taking part in paid-for outdoor recreational activity has increased, other behavioural changes may well work to compensate for this loss in potential market. For example, previously affordable

foreign holidays now have to be replaced by home holidays for some families, serving to increase the size of the domestic market. There is data to suggest that this has been an important cultural change over the last few years. Further, despite the doom and gloom, there will also be millions of families whose financial circumstances have been entirely unaffected by the wider economy, or will even have improved. All of them will remain or can become your customers.

Societal changes can also alter the value placed on particular kinds of activities, making customers more prepared to prioritise outdoor recreation over other leisure activities. In general terms I think that there has been a societal shift in favour of physical recreation where customers are participants over passive recreation where customers are observers.

So, contrary to my assumptions as a student, the truth is, that unless you entered the recession trading with every single member of society, there will always be room to grow your business, even if you have to work a bit harder to do it in a downturn. And that opportunity is greater in the outdoor leisure sector than in many other parts of the economy.

Our experience

At Go Ape it turned out that we entered the recession well prepared for it. I would like to claim credit for this high degree of commercial foresight but I was just as surprised by the financial crisis as everyone else.

Costs

In our sector the recession hit in 2010 with a double-digit downturn in demand being a common experience for outdoor leisure companies around the country. The initial, and necessary, response to this type of shock to your revenue, or top line, is to batten down the hatches on your costs whilst you seek to understand the continued viability of your business. I am ashamed to say that we were able to take a huge amount of costs out of our operations (without a single redundancy) simply by making ourselves more efficient. These costs should never have been allowed to work their way into our business but had crept in over a number of commercially successful years. For this alone the recession has done Go Ape the power of good – making us into a leaner and more focused business.

Growth

The mistake, however, is to continue to keep the hatches battened down and wait for the world to sort itself out and for “normal” commercial life to resume. As we have found since 2010, “normal” has not returned and doesn’t look like it will for many years to come. Instead of waiting for life to get better, our response at Go Ape has been to see the downturn as a growth opportunity. If long established sites were going to suffer year-on-year declines in visitor numbers then we must grow through that by:
 (a) offering new activities at existing sites to encourage new and repeat visitors; and
 (b) growing geographically to enter new demographics.
 By following this twin approach we have more than made up for any decline in our traditional sites, making 2011 and then 2012 our two most financially successful years ever.

Instead of simply offering a tree top adventure course at each of our sites, we have undertaken a roll out of some 200 Forest Segways across our sites, as well as developing a Tree Top Junior course for 6-12 year olds. The effect has been to widen our appeal to a new demographic as well as providing a reason for old customers to return. In addition, each year we have opened wholly new sites in the UK as well as entering the US market in 2010, exposing us to wholly new demographics.

Discounting

What we have strongly resisted has been the temptation to discount prices. In our view this way disaster lies. The economics of discounting are deeply unattractive, and not totally intuitive (a dangerous combination not often known to marketing departments unless you tell them). The following table makes clear quite how much *extra* business you need to attract by way of discounting simply to *stay where you are* in terms of profitability. At Go Ape our Gross Margin as a % of revenue is in the low 40s. This means that even a 10% discount needs to increase customers by more than a third before it stops doing damage and starts to contribute. A 15% discount requires a 60% increase in sales just to stand still! Less intrinsically profitable organisations have to work even harder. Ouch!

And this is before you consider what damage discounting does to your brand.

EFFECTS OF REDUCING PRICES

Sales volume increase required to MAINTAIN existing Gross Profit¹

% Reduction	Existing Gross Margin Percentage								
	5	10	15	20	25	30	35	40	50
1	25	11	7	5	4	3	3	3	2
2	67	25	15	14	9	7	6	5	4
3	150	43	25	19	14	11	9	8	6
4	400	67	36	25	19	15	13	11	9
5		100	50	33	25	20	17	14	11
7.5		300	100	60	43	33	27	23	18
10			200	100	67	50	40	33	25
12.5			500	167	100	71	56	45	33
15				300	150	100	75	60	43

E.g. This shows that where price is reduced:

- by 10% at a Gross Margin of 40%, the increase in turnover required is 33% to generate the same amount of gross profit
- by 15% at a Gross Margin of 40%, the increase in turnover required is 60% to generate the same amount of gross profit

How to grow

So if the answer to the recession as a (viable) business is to grow how can you go about doing this? And how can local government help? In my view, there are a number of areas in which governmental organisations can and should help.

Funding

Despite the denial of the main UK banks, anecdotal evidence strongly suggests that many UK firms are unable to fund growth by getting banks to lend at any commercial rate. The truth is that UK Banks have lost lots of money and want to rebuild their strength by taking our money. So, despite record low interest rates, if you are able to attract funding at all in the UK then commercial interest rates are in the region of 6%-7%. In our operations in the USA similar commercial rates are currently running at 4%. That is a big difference and one for central government to ponder.

Of more relevance to local government is the availability of grants for capital expenditure. As currently operated the obsession with safeguarding public funds by demonstrating a convoluted due process actually works to stymie much of the rationale for the grants in the first place. This needs to change. Go Ape has been offered grants to part fund capital expenditure on new sites. In each case we have taken the decision not even to apply due to the length of the process being wholly out of kilter with the need for speed when growing a business. My suggestion is that government should be as process driven as they like so long as they can turn a decision round within a week.

Reference

¹The Business Growth and Development Programme, Cranfield University School of Management <http://www.som.cranfield.ac.uk/som/bgp>

In addition to straightforward grants, governmental organisations should encourage joint ventures or other funding arrangements with private enterprises that provide socially beneficial, but wholly commercial, recreational activities in the outdoors. Having the freedom to enter into such commercial partnerships, where an element of funding could come from the governmental or corporate landowner with the product/brand and operational activity provided by the private sector, might enable otherwise cash starved growth businesses to expand.

Access to land

One of the key assets that local government has and outdoor recreation needs is long-term access to land. When a new idea is floated to a large organisation the easy and safe answer is always to say no. Start-up businesses are inherently risky. Entrepreneurial businesses are normally demanding partners because they want to get things done, often at an uncomfortably fast pace! But, from our own experience at Go Ape, being backed in the form of long-term access to land is crucial to successful growth. In 2002 Go Ape consisted of a home video of someone else's ropes course in France. And yet the Forestry Commission in England was sufficiently far sighted to back that vision and open up its entire forestry estate to a start-up company. They have since been criticised for doing so but that backing was instrumental in the successful growth of our business; a business that now employs 600 people and generates more than £4m pa for HM Treasury, not to mention a healthy return to the Forestry Commission and encouraging more than 550,000 customers each year into the forest.

This backing must be **long term** - certainly more than 15 years, to allow a private business sufficient confidence to invest significant capital for growth and still have something of value to sell once they have built up a successful business, should they wish to.

Planning permission

Without doubt one of the key barriers to entry, and therefore growth, in the outdoor recreation area is the delay and difficulty in obtaining planning permission. This is obviously a sensitive area but elected members need to take a policy decision as to whether they are open

to economic growth in areas that are often rural, beautiful and with a large retired community. Strong political leadership that is not put off by small but highly vocal opposition is important.

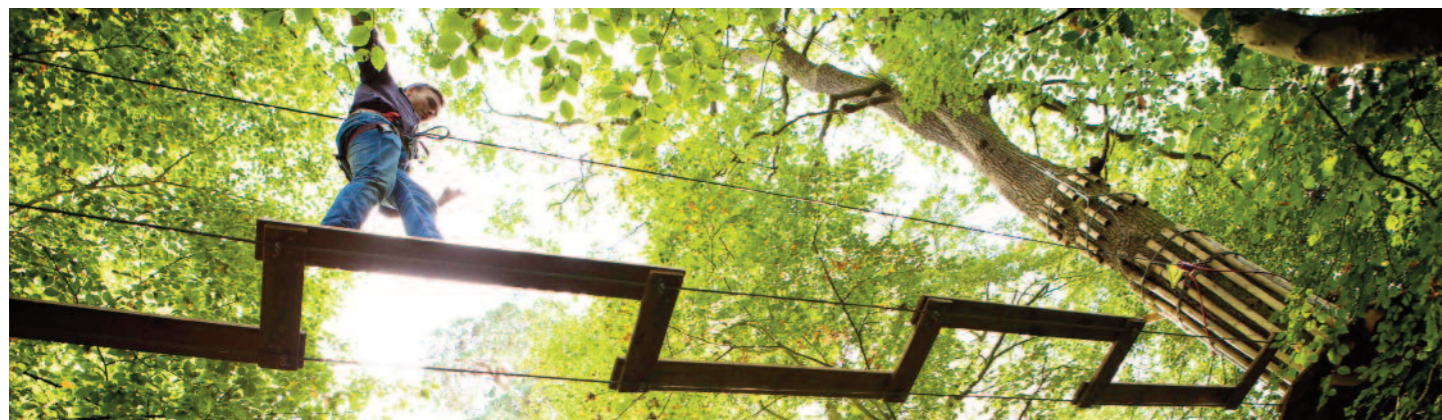
Sharing the burden

Growth businesses lack cash. This is because they put any spare money back into their business to fund the further growth. The nature of their activities are also relatively high risk: a new location or a new product is never certain to succeed until you build it, open it to the public and see if they come. One of the key areas of assistance that a governmental landowner can give is a willingness to share the burden of potential failure as well as share in the proceeds of success. In our experience this has meant landowners being prepared to match rental returns to actual results as opposed to projections. The better we do the more we pay, which is great because we have succeeded and can afford it. But, if a new site does not fly immediately, our land costs drop as well to help offset some of the burden. Something as simple as this makes a lot of difference.

Being prepared to fail

Not every idea turns out to be a good idea. Whilst nobody wants to be associated with a failed project, if you are going to make the most of opportunities then it is inevitable that some will fail. It is really important that every organisation learns to celebrate failure as well as success. If a project fails through negligence or laziness then that is not acceptable. But failure resulting from taking a calculated risk that ends up not working out shows that a team is going for it. This should be celebrated and encouraged so that others are encouraged to go for it too.

You might read this shopping list and ask yourselves, "Do they want it on a plate?" Well the answer should be "Yes!" Successful companies in outdoor recreation provide a great resource to customers, employ lots of people - often younger people in areas of low employment opportunity and generate a lot of taxes for the treasury. It is worth noting that, at Go Ape, through all the taxes that are raised on our operations, the government's take is more than four times as great as our post tax profit... For every £1m that we earn through our efforts the government takes c£4.3m. It makes you think.



Contact

Jerome Mayhew, Managing Director, Go Ape
Jerome.mayhew@goape.co.uk



Growing Rural Tourism and the Outdoor Economy

Lyndsey Swift, Head of Partnerships, VisitEngland

VisitEngland, working with the industry, has identified the significant growth potential for rural tourism, prioritising it in England's tourism strategy - The Strategic Framework for Tourism 2010-2020. Tourism creates jobs, opportunities for business growth and supports the economic viability of communities - all of particular importance to rural England. England has a broad range of outdoor pursuits and activities for visitors to experience and enjoy when holidaying in England. It is a distinct and diverse offer. VisitEngland works closely with destinations and national partners to promote all that England has to offer, however, there are opportunities to further develop products and experiences that are less weather dependent, appeal to visitors all year round, encourage extended stays and enhance and benefit the natural environment.

There is huge potential for rural tourism and the outdoor economy to contribute to the Framework's target of 5% growth year on year in the value of tourism. Despite the size and attractions of rural England, the proportion of all overnight domestic trips is relatively low when compared with all overnight domestic trips in England. Of all overnight domestic trips, 19.3 million, or 19%, were made to the countryside in England in 2009. The value of countryside trips in England in 2009 was £3.2 billion, 18% of total domestic spend¹. But holiday trips to the countryside are on an upward trend and this must be sustained.

Tourism in rural areas creates employment and opportunities for business growth where other opportunities may be limited, as well as maintaining and protecting existing jobs, micro businesses and those self-employed in rural areas. In Yorkshire, for example, rural areas account for 39% of all jobs in the visitor economy in the region and 37% of the total visitor economy (source: Welcome to Yorkshire).

It provides the ability to supplement the income streams of businesses operating or fixed in rural locations, a good example of this is farm diversification. This can help maintain the environmental and landscape qualities which are valued by visitors, communities and businesses. It also supports the economic viability of communities. Local services and amenities, such as shops, pubs, restaurants, transport and postal services are all supported and sustained by visitors to rural areas.

Tourism has the ability to contribute to the conservation and enhancement of England's natural and built environment through the businesses and visitors that benefit and rely on these rural assets. This is not always a direct contribution but recognition by those investing in the environment that their conservation is important to the visitor economy.

References

¹ United Kingdom Tourism Survey (2009)
http://www.visitengland.org/insight-statistics/major-tourism-surveys/overnightvisitors/UKTS20052008/UKTS_2009/UKTS_2009.aspx



There are a number of challenges and opportunities for the growth of rural tourism and the outdoor economy. The diversity of the offer means that these challenges and opportunities will differ from area to area.

To varying degrees, across different rural areas, tourism can drive, dominate or sustain the economy. However, it must be managed carefully to avoid over reliance of local economies on tourism and to avoid the associated negative impacts on the environment, economy and communities, for example the supply of affordable owned or rented housing, the level of wages, increased traffic congestion and, potentially, environmental degradation.

Day visits to the countryside account for 16% of tourism day visits (136 million trips), accounting for £4 billion in expenditure, 11% of the day visits in total². There is significant growth potential for rural tourism if day visits can be converted to overnight stays. The same growth potential exists from international visits. Total inbound visits to England in 2009 were 25.4 million and a relatively low 17% involve a trip to the countryside³. Compared to the total of all trips in England, trips in the countryside are more likely to be for a holiday than for business purposes⁴. By exploring the reasons for this decline and taking action this trend could be reversed. Day visits to the countryside are significantly more seasonal than other destinations. 70% of countryside day visits take place in spring and summer, compared with 52% across all destinations, and 7% take place in the winter months, compared with 21% across all destinations⁵. To ensure rural tourism growth, destinations must develop and market new products and experiences that appeal to visitors all year round and are less weather dependent.

Rural tourism provides an escape for the urban population and a range of distinct leisure time activities. It provides recreation and tranquillity and the interweaving of nature with local architecture, food, culture and community. This could be a potential message to develop and help target growth in business tourism in rural areas. Consumers are becoming more reliant on technology to access information. Rural products can be brought alive using new interpretation techniques to attract and meet the expectations of new and existing audiences. A good example is the National Trust's series of downloadable walks, an iPhone application and geo-caching which is being trialled at several sites. However, lack of provision of broadband connectivity in many rural areas may prevent these opportunities from being realised. The Government is investing in broadband in rural areas which is a positive step and the Country Land and Business Association are working with Broadband Delivery UK (BDUK) to establish the level of demand for broadband and the viability of a community project.

Rural attractions and businesses are usually relatively small. This means that careful promotion is required to prevent creating demand that rural areas cannot meet or that would lead to a scale

of attraction that would detract from the quality of the experience for visitors. Communicating the rural tourism offer to consumers needs to be carefully managed across the country.

The good range of local produce scores highly among those who visited the countryside in the England Brand tracker, when compared with other types of destination. Rural tourism is distinctive to its locality; the foods, products and landscapes have been shaped by generations, providing opportunities to create authentic appealing experiences for visitors that allow local communities to celebrate and take pride in their culture.

Developing rural tourism products and experiences for visitors that are based on natural assets, for example wildlife, provides a potential business opportunity. If natural and wildlife asset managers are well informed about the markets for their products, understand the potential for raising revenue to support and protect their assets through tourism, and the measures that can be taken to minimise the impact of visitors, then this opportunity can be maximised.

It is important for resident communities to be involved in the development of tourism in rural areas and understand the benefits it can bring. There needs to be a greater focus on support for destinations and communities which take a lead on tourism in their locality and that local community groups, volunteers and stakeholders can drive forward initiatives.

Planning constraints can be a major barrier to the expansion and diversification of the rural tourism product. Guidance, collection and dissemination of evidence and research to support the case for rural tourism development are crucial and rural tourism growth must be facilitated in the Government's National Planning Framework. Many problems that rural tourism businesses and related stakeholders face are shared with urban equivalents but solutions need to be tailored to take account of the different operating environment. This includes the dispersed nature of rural communities and businesses within them, access to services and support, visitor access issues and vulnerability to increasing prices in fuel, energy and food.

Transport in rural areas continues to be a challenge for tourism and local communities. Trips to the countryside in England are more likely to be taken by car as rural areas have fewer alternatives; public transport provision is a major challenge and perceived as being expensive. Rising fuel prices place rural destinations at a disproportionate vulnerability due to more limited alternatives and, sometimes, distant location from urban populations. With government policy aiming to reduce use of the car and the majority of new transport investment taking place in urban areas, local solutions to transport issues in rural destinations must be found.

A completely car free rural area and low carbon initiatives will be difficult to implement. This means accepting that some car use is

necessary for rural tourism but encouraging more initiatives that increase dwell times at destinations, reduce mileage and length of car journey, such as walks and itineraries that are integrated with public transport and visitor experiences. It is also important to encourage sustainable transport options when visitors arrive at their destination, for example, encouraging accommodation to link to cycle hire firms, cycle racks, and cycle friendly venues for visitors to bring their own bikes.

The impacts of climate change on tourism cannot be ignored. Changes to the climate are largely predicted to create milder, wetter winters and drier, warmer summers with increased incidences of extreme weather. It may also affect how the landscape is managed which may impact on its visual appeal or its ability to repair itself from the impact of visitors. The current focus should be on preparation and adaptation to these changing conditions.

The vulnerability of rural tourism to current and expected increasing fuel, energy and food prices compromises its profitability and resilience. Tourism operators in rural areas could reduce overheads and the resources they use by moving away from expensive and polluting sources of energy. This could be achieved through accessing renewable energy initiatives, many local to rural areas, such as timber, wind, hydro and solar farms. In some locations these initiatives might be tourism attractions in their own right and help to disperse visitors away from 'honeypot' sites. However, the potential impact on the landscape and aesthetics of multiple or large scale developments could be a potential threat to the very assets visitors are coming to see. There are opportunities to work more closely with energy companies and explore whether they can tailor their services to rural and lifestyle businesses.

Changes to traditional funding streams for agriculture and land management, such as the EU's Common Agricultural Policy (CAP) and



References

² United Kingdom Tourism Survey (2009)

http://www.visitengland.org/insight-statistics/major-tourism-surveys/overnightvisitors/UKTS20052008/UKTS_2009/UKTS_2009.aspx

³ International Passenger Survey (2009) <http://www.visitbritain.org/insightsandstatistics/inboundvisitorstatistics/>

⁴ United Kingdom Tourism Survey (2009)

http://www.visitengland.org/insight-statistics/major-tourism-surveys/overnightvisitors/UKTS20052008/UKTS_2009/UKTS_2009.aspx

⁵ England Leisure Visits Survey (2005) <http://publications.naturalengland.org.uk/publication/212255>



Rural Development Programme for England (RDPE), mean that rural asset managers are looking at more diverse income streams and tourism presents opportunities. New models of funding available in urban areas, such as Business Improvement Districts, are not as readily available or appropriate in rural areas. However, there is greater potential for the involvement of the community and the 'third sector', which adds to the distinctiveness of the rural product. There are also rural specific measures in place such as Sustainable Development Funds in all National Parks and AONBs, and the RDPE Local Action for Rural Communities funding. These funding streams could benefit rural tourism growth if targeted effectively.

Drawing on the challenges and opportunities highlighted here, three priorities have been identified by VisitEngland and the industry that will deliver sustainable growth in rural tourism and the outdoor economy. These are crystallised in the Strategic Framework's Rural Tourism Action Plan and focus on diversifying and modernising rural tourism products to generate business opportunities suited to local environments and communities, developing a year round visitor offer; increasing consumer awareness, understanding and enjoyment of the

products and experiences available in rural areas; and encouraging rural communities and economies to benefit from the value of rural tourism by taking ownership for the development, management, protection and conservation of rural assets and locations. The industry can deliver growth through supporting these priorities and the specific actions set out in Action Plan, ensuring that the growth potential is developed in a sustainable way i.e. creating richer experiences, increasing the appreciation of the landscape and its produce to encourage more responsible behaviour, drawing on the best of the locality to meet visitor expectations, maximising economic returns that stay within the area and support key rural assets, benefitting the environment and local community.

For further information on the Strategic Framework for Tourism 2010 – 2020 see: <http://www.visitengland.org/strategicframework/>
Updated data from visit England available from May 2013: <http://www.visitengland.org/insight-statistics/>

Future Funding Opportunities

Pippa Langford, Programme Manager – Delivery Improvement Programme, Natural England

In the past, Government has helped rural businesses through a range of grants and training schemes. It has also supported access through funding to local authorities and for National Trails, but in the current financial situation, many local authorities are reducing their spend on paths and greenspaces, and some businesses are seeing reduced income.

Government is currently considering how to allocate EU funds for development including in particular the Rural Development Fund. This is an opportunity to consider the market for outdoor recreation, the factors which constrain demand, how the market for outdoor recreation could be expanded and what might be the role of Government funding to help achieve growth and other public benefits. Government has also increased the focus on localism, so the role of local stakeholders such as LEPs, LNFs and LAFs will be crucial in directing grant schemes to achieve locally desired outcomes.

The value of tourism has been covered earlier in the conference but it is worth noting that tourism is the UK's fifth largest industry¹. In terms of participation in activities for holiday visits from abroad: 25% involved visiting parks and gardens, 20% walking in the countryside, 14% visiting coastline and countryside and 1% cycling². That equates to about £1.87 billion overseas expenditure from people enjoying the natural environment in the countryside and coast on public rights of way and access land.

Total spend by English visitors to the natural environment between March 2010 and February 2011 is estimated to be £17.2 billion³. Spend was incurred in only one quarter of the 2.49 billion visits to the natural environment in 2010/11. Average spend per person for those visits that incurred spend was £29.69, this makes a contribution to the economy from both direct and indirect expenditure associated with the trip. Just over a half (53 per cent) was spent on food and drink, with 13 per cent on petrol and diesel and 15 per cent on admission fees.

The British Horse Industry Confederation (BHIC) (October 2009) indicated that there are between 1 and 1.3 million horses in Britain. Horse owners, carers and riders in Britain spend more than £7 billion per year in gross output terms. The average annual expenditure per privately owned horse is £2,166.

During 2010, Dillon and Dickie (2012)⁴ estimated that up to £38.8 million of benefits were delivered directly through the 1.29 million children taking trips to outdoor learning sites, but the authors believe this to be a gross underestimation of the actual value being delivered by wider programmes and activities.

Outdoor recreation is worth billions to the economy however the key messages about spending that we need to know are these:

- who spends;
- how much;
- on what; and,
- where.

And then we need to know how we can increase spend.

What is most important to notice is that expenditure was most likely to be incurred on visits taken with children, or on visits to destinations further afield like National Parks or the seaside. Visitors from urban areas produce the biggest boost for the economy, with the average amount spent being around £7.70, significantly higher than the average spend by a visitor from a rural or town/fringe area (£4.98 and £4.05 respectively).

We have good information about where people go. Of the 5.4 billion visits to the natural environment during the period March 2009 to February 2011, visits to the countryside account for 50%, greenspace in towns and cities 39% and 11% in seaside locations. The majority of visits to the natural environment are to green spaces close to people's homes, holiday accommodation or place of work. Four out of ten visits were to green spaces within one mile of home or other base location. A further 26 per cent were within one to two miles from home or base location⁵. Visits to coastal areas were more likely to be taken by car, while the majority of countryside visits were taken on foot by people living locally in rural or urban fringe areas.

Engaging a wider perspective of other outcomes that are relevant to public policy it is worth noting that where people visit is important in terms of delivering public benefits: better health is related to access to green space regardless of socio-economic status⁶. However, the likelihood of children visiting local green space has fallen, with 10% of children playing in natural environments compared to 40% of adults when they were young⁷. This is undoubtedly contributing to major challenges facing society today – including the rise in childhood obesity and mental health issues. Horse riding though has been shown to be beneficial to health⁸ and has over 4 million participants, some of whom have a long standing illness or disability. 65 percent of equestrian participants are from socio-economic groups C, D and E, 75 percent of horse riders are female, 31 percent of horse riders are aged under 16, 18 percent are aged 16 to 24, the urban/rural split amongst frequent riders is 50:50.

To improve demand for outdoor recreation we need to know what factors would drive this change and then consider which could be influenced by public funding. The Henley Research undertaken for

Contact

Lyndsey Swift, Head of Strategic Partnerships, Visit England
Lyndsey.Swift@visitengland.org

References

- Deloitte and Oxford Economics, (2010). The Economic Contribution of the Visitor Economy: UK and the Nations. Visit Britain. http://www.visitbritain.org/Images/Economic%20case%20for%20the%20Visitor%20Economy%20-%20Phase%202%20-%202026%20July%202010%20-%20FINAL_tcm139-192073.pdf.
- ONS (2012) International Passenger Survey ONS <http://www.ons.gov.uk/ons/rel/ott/travel-trends/2011/rpt-travel-trends-2011.html>
- Natural England (2011). Monitor of Engagement with the Natural Environment: the national survey on people and the natural environment – Annual Report from the 2010-11 survey. Natural England Commissioned Report 83. <http://publications.naturalengland.org.uk/publication/45011>

Reference continued overleaf



Natural England in 2005 identified seven factors as the most important 'drivers of change' determining the demand for outdoor recreation in England to 2025.

These are:

- 1) an increasingly affluent society,
- 2) well-being,
- 3) changing demographic profile reconfiguring age,
- 4) increased availability of information,
- 5) social inclusion,
- 6) risk averse society and
- 7) convenience culture (Henley Centre 2005).

Some of these factors may need to be reviewed in the light of recent social, economic and environmental changes. For instance a poll published by the National Trust⁹ indicated that 84 per cent of people said that days out were as or more important to them as a result of the economic climate. The research indicated that 'simple pleasures' were the priority for people with walks in the park being the most popular option.

For horse riders shortages of places to go riding and/or lack of opportunity are identified as the deterrents for greater participation in equestrian leisure. Only 22 percent of the 188,700 kilometres of Public Rights of Way in England (21) carry rights for horse riders. Only five percent of Public Rights of Way in England are available to carriage drivers. Most of these paths do not link to form an off-road circuit. An online survey by Horse & Hound found that 34 percent of

respondents do not really have any local bridleways, 18 percent said their local bridleways were verging on or are dangerous, 35 percent said 'they could be worse and 12 percent thought their local bridleways were 'brilliant'. Only one percent said they did not hack. In 2009, the DFT reported 100 rider casualties arising from road accidents. 22 riders were seriously injured in road accidents and there was one death. In 2010, 61 road accidents involving equestrians were reported to the BHS. Nine of these resulted in horses being killed or destroyed. Two of these resulted in rider death.

The report "Public access to woodlands and forests: a rapid evidence review" states that "creating and maintaining paths and cycle ways is a simple and effective way of improving woodland for better accessibility. The Quality of Experience studies found that when users were asked what their favourite thing about the site was, 41% mentioned walks, paths and trails. This was the top scoring answer alongside beautiful scenery. Lack of clear signage regarding public access on private woodlands contributes to public uncertainty. 'The urban groups expressed some feelings of uncertainty about where people were allowed to go in the countryside, which areas were public space and which areas were private, and this raises issues about social inclusion and the use of the countryside particularly for groups who are not frequent or familiar users'¹⁰.

The evidence suggests that signage at the site is also important to enhance visitor experience and to encourage repeat visits. This is particularly important at the point of entry at a site. Welcoming information can help create a welcoming atmosphere, overcome fear about getting lost and to address issues of vulnerability and safety¹¹."

The Diversity Review¹² identified several actions to improve accessibility for underrepresented groups:

- Site design and management: There is a need to focus on spaces for people and encourage under-represented users, providing a range of experiences and appropriate on-site information;
- Information and communications: The terminology of countryside users needs to be made more user-friendly, an inclusive strategy needs to be adopted that takes into account people's perceptions in communications, and a centralised database on green outdoor spaces would help maximise access to information;
- Building foundations for the use of green outdoor spaces: More support for access to outdoor learning is necessary, including facilitated and escorted visits, well-advertised special events and long-term projects;

And it is worth remembering that accessibility improvements aimed at underrepresented groups often improve the experience for everyone.

From these numerous findings it is possible to propose that removing barriers would grow public participation in outdoor recreation, and therefore public funding could be directed at:

- New/altered bridleways, and greenspace available for users on foot,

horse and bicycle, to reduce the fragmentation of the network, and make it safer.

- Improved signage
- Promotion
- Site specific improvements
- Provision of outdoor learning/experiences particularly for children and disadvantaged
- Training for outdoor recreation providers
- Grant support for outdoor recreation providers

All of these actions are included within the EU Commission's priorities for the UK (see Annex). The Scottish National Access Forum's paper about funding for outdoor recreation covers many of these actions and is a good example of how funding can deliver both public benefits of improved health and wellbeing and economic growth.

The future funding picture is not simple, but Natural England have completed some analysis of the draft regulations and indicated what actions could be funded and it includes all of the actions identified above. When the schemes are available LEPs will bring together local authorities and local businesses and will design and deliver investment strategies that target the needs of their local area. Under the proposals a distinct rural development programme would continue to fund delivery of environmental objectives, enhance the competitiveness of agriculture and forestry industries and support rural communities.¹³

To achieve the best outcomes, further work will need to be done at the local scale to consider what mix of activities is best suited to the local situation. It is already intended that LEPs and LNPs should have a closer relationship, perhaps this should be extended to LAFs for their interest in improving access and Health and Wellbeing boards because of their expertise in local health. LEPs and LNPs weighing up investment in local access might also want to consider another finding from MENE: frequent visitors are more likely (than others) to engage in pro-environmental behaviours such as recycling and preferring to buy seasonal and locally grown food, which is an additional boost to the economy that could be exploited by local businesses.

Finally, if any of these possibilities have been of interest, there will be opportunities to send in your comments to Government about the new rural development funds and other EU funds, these will be open in the Spring 2013.

Further reading

Commission for Rural Communities 2013 Rural micro businesses what makes some thrive in a challenging economic climate?
European Commission (2012) Position of the Commission services on the development of the Partnership Agreement and programmes in the United Kingdom for the period 2014-2020, Ref. Ares(2012)1315758 - 08/11/2012

<http://www.europeanfundingnetwork.eu/documents/Postion%20Paper-final%20doc.pdf>

ANNEX

European Commission priorities for the UK

The Commission have identified three priorities for the UK:

- Increasing labour market participation through improved labour market and education policies and reducing the risk of social exclusion
- Promoting R&D investment and the competitiveness of the business sector
- Promoting an environmentally friendly and resource efficient economy
- Promoting environmentally friendly and resource efficient economy
- Protection of Natura 2000, HNVF areas, organic farming, promotion of collective action to deliver environmental public goods. (Note, Public access to the natural environment is a key part of the public goods which come from the natural environment and account for probably over half of the economic value of these public benefits)
- Development and promotion of employment in eco activity (Recreation in the natural environment is an eco activity which sustains jobs and make wider contributions to the economy through supporting rural services eg National Trails evidence such as the Pennine Bridleway and South West Coast Path)
- R&D
- Promotion of innovative ways to use ecosystem-based approaches to improve the competitiveness of SME's, agriculture and aquaculture sectors.
- Management organisation in the supply chain in all sectors including agri-food, seafood and bio-economy.

Increasing labour market

- Supporting vocational training in the agricultural, fisheries and forestry sector.

References

- ⁴ Dillon, J. & Dickie, I. (2012). Learning in the Natural Environment: Review of social and economic benefits and barriers. Natural England Commissioned Reports, Number 092. London: Natural England.
- ⁵ Natural England (2011). Monitor of Engagement with the Natural Environment: the national survey on people and the natural environment – Annual Report from the 2010-11 survey. Natural England Commissioned Report 83. <http://publications.naturalengland.org.uk/publication/45011>
- ⁶ Greenspace Scotland (2007). The links between greenspace and health: A critical literature review. Greenspace Scotland. [www.greenspacescotland.org.uk/upload/File/the per cent20links per cent20between per cent20greenspace per cent20and per cent20health per cent20critical per cent20literature per cent20review per cent20Oct07.pdf](http://www.greenspacescotland.org.uk/upload/File/the%20links%20between%20per%20cent%20greenspace%20and%20per%20cent%20health%20critical%20literature%20review%20Oct07.pdf)
- ⁷ England marketing (2009). Childhood and nature: a survey on changing relationships with nature across generations - Report to Natural England. Natural England. http://www.naturalengland.org.uk/Images/Childhood%20and%20Nature%20Survey_tcm6-10515.pdf

References

- ⁸ BHS (2012) The health benefits of horse riding in the UK. The British Horse Society http://www.bhs.org.uk/~/_media/BHS/Files/PDF%20Documents/Health%20Benefits%20of%20Riding%20in%20the%20UK%20Full%20Report.aspx
- ⁹ National Trust (2009) Simple Pleasures Survey. National Trust.
- ¹⁰ O'Brien 2005b. Social and cultural values of trees and woodlands in northwest and southeast England. Forest Snow and Landscape Research. 79:169–184.
- ¹¹ Ambrose-Oji, B. 2009. Equality and Inclusion of Social Diversity with respect to Woods and Forests in the UK: An Evidence Review. Forest Research: Farnham, Surrey.
- ¹² Countryside Agency (2005) What about us? Diversity Review Evidence Part 1 <http://publications.naturalengland.org.uk/publication/63060>
- ¹³ BIS 2012 Government discusses new approach for EU funding Press release 21st November 2012 <https://www.gov.uk/government/news/government-discusses-new-approach-for-eu-funding>



The role and significance of the outdoor economy for delivering growth and jobs

Professor Neil Ravenscroft, Professor of Land Economy, University of Brighton

Introduction

It has long been understood that the 'outdoor economy' is a vibrant element of the national economies of most Western nations. Many countries and regions market themselves as outdoor activity destinations, where visitors can hike, climb, swim, sail or do any number of activities as part of their holiday, while also enjoying luxury accommodation and authentically local culture and cuisine. Destinations such as Windermere have developed this to the point where their name is synonymous with outdoor activity, and where the local economy is dominated by tourism and recreation. As the Lake District National Park Authority¹ has observed, this dominance spreads to all aspects of the local service supply chain, as well as into local professional and trade services.

Conventional economic analysis suggests that we can estimate the impact on growth and jobs of such activities by counting up the money flowing into the system and multiplying it by a factor that reflects how much money remains in circulation locally. The more the local economy is isolated, the bigger the multiplier and the larger the economic impacts. Of course, in open economies such as the UK, much of the money flows out, to supermarket, petrol company and hotel chains, leaving many local people with low paid seasonal employment that belies the marketing images used to promote the destination².

While this may be the fate of the larger destinations, I want to argue in this paper that there are ways in which many smaller and less well known places can capitalise on the outdoor economy in ways that stimulate growth and local employment. Following a brief section reviewing what we know about the outdoor economy, I will introduce the idea of building localised associative economies that can foster growth and jobs and will offer a few examples of destinations that have applied the thinking to developing vibrant and viable economies based at least partly on outdoor activities.

The significance of the outdoor economy

Interestingly, although the term 'outdoor economy' is frequently referred to in marketing literature, it is yet to be recognised as a distinct economic sector, certainly in the UK. This is in contrast to the USA, for example, where the outdoor recreation economy comprises equipment and travel components and is readily understood as a vital contribution to jobs and the economy. Indeed, in 2012 the sector was worth an estimated \$650bn and provided 6m jobs, making it the third largest area of consumer spending, after financial services and health care³. The nearest equivalent in the UK has been a study of the economic impact of the National Parks in Wales, which estimated that the National Parks contribute £6bn annually to GDP and account for 1 in 6 of all Welsh jobs, rising to more than 1 in 3 jobs in the National Parks themselves⁴.

In neither case is there an unambiguous definition of the sector. However, it seems clear that references to 'outdoor economy' are generally taken to refer to outdoor recreation rather than to all economic activity. In their work on the situation in Scotland⁵ note that the proportion of the Scottish adult population undertaking regular outdoor recreation rose from just under 33% to just over 44% in the years 2003 to 2007. However, within this there was a trend away from recreation in the wider countryside to local visits to parks and gardens. This mirrors wider trends in the UK⁶, although there is evidence that participation is growing in capital-intensive activities such as watersports⁵.

The associative economy

While there is little doubt that outdoor recreation can contribute to growth and jobs, there is little apparent understanding about how where the impact falls, and what this means for people trying to make a living in outdoor environments. In particular, the growth in the value of the equipment market may have little impact locally, while quite a proportion of the money spent on travel may similarly be unrelated to the destination. This means that it is quite possible that the growth and job estimates misrepresent the health and dynamism of many outdoor economies, particularly where the cost of site access is minimal. This suggests that we need to look at a new approach to generating growth and jobs that privileges local over regional, national and global economies.

In 1922, Rudolf Steiner gave an economics course that argued that globalised economic relations would require a new approach to

economic science. For Steiner, this was about moving beyond the narrow confines of the market to undertake economic life on a consciously co-ordinated associative basis. This involves us, individually and collectively, taking steps towards association, in which economic life is understood as a whole and is not viewed from the perspective of individual profit maximisation. What this means, in practical terms, is looking at the dynamics of a local economy simultaneously from the perspective of all those involved, to see how the actions of each person or component of the economy can be developed to maximise benefit for the whole. In essence this is about understanding margins: how much does one person require in order to perform their activity that then allows others to benefit from operating their activities, and so on. In this form of association, money circulates, and lots of small margins can build into a viable, highly networked and self-supporting local economy⁷. Conventionally this type of association has been described in spatial terms as clusters of "interconnected companies and institutions in a particular field, linked by commonalities and complementarities"⁸.

It is here that the outdoor economy is such a potent tool for associative economic development, because the consumers are also producers of their own activity (ie the activity doesn't happen without them), while outdoor activities can simultaneously achieve several personal and social goals (eg going for a walk with the family that also has personal health benefits). This is increasingly understood by consumers, with Curry and Brown (2010, p. 43) noting how in Scotland "localised outdoor recreation is considered to be the area of principal growth, driven by health imperatives, limits to the availability of time and carbon reduction practices". Whilst this implies further growth in the demand for local resources, "this kind of recreation is likely to become more 'jointly' consumed with functional walking or cycling to the shops, or increasing localised food production" (Ibid, p. 43). It is here, in an associative approach to providing for joint consumption, that local businesses have the potential to create a strong outdoor economy that does underpin local growth and jobs. However, as Novelli, et al⁹ have observed, there are as yet few examples of clusters in outdoor recreation, let alone clusters that operate associatively.



References

¹ Lake District National Park Authority (2011) Windermere Management Strategy, 2011 [online] Available from: http://www.lakedistrict.gov.uk/_data/assets/pdf_file/0012/169959/windermere_management_strategy_2011.pdf

² Tribe, J. (1995) The economics of leisure and tourism. Oxford: Butterworth-Heinemann.

³ Outdoor Industry Association (2012) The Outdoor Recreation Economy [online] Available from: http://www.outdoorindustry.org/pdf/OIA_OutdoorRecEconomyReport2012.pdf

⁴ Valuing Our Environment Partnership (2006) Valuing our environment: the economic impact of the National Parks of Wales. Report to the Countryside Council for Wales. Swindon: National Trust.

References

⁵ Curry, N. and Brown, K. (2010) Differentiating outdoor recreation: evidence drawn from national surveys in Scotland. Journal of Policy Research in Tourism, Leisure and Events 2, 29-50.

⁶ Curry, N. and Ravenscroft, N. (2001) Countryside recreation provision in England: exploring a demand-led approach. Land Use Policy 18(3): 281-291.

⁷ Hirst, P. (1993) Associative democracy: new forms of economic and social governance. London: Polity Press. ⁸ Porter

⁸ Porter, M. E. (1998) Clusters and the new economics of competition. Harvard Business Review 76, 77-90

⁹ Novelli, M., Schmitz, B. and Spencer, T. (2006) Networks, clusters and innovation in tourism: a UK experience. Tourism Management 27, 1141-1152

While accepting Novelli, et al's (2006) caution about the lack of cluster development in outdoor economic activity, there are some examples that serve to illustrate the argument. Novelli et al (2006) themselves report on the establishment of the UK Healthy Lifestyle Tourism Cluster (HLTC) encompassing Eastbourne, Lewes and Newhaven in East Sussex. Organisations in the cluster are associated with the provision of indoor and outdoor recreation, food and accommodation. In terms of outputs "[c]ommercial collaboration became one of the most obvious outputs of the alliances facilitated by the cluster, as well as voluntary arrangement of business referrals and joint marketing under the banner of HLTC" (p. 1148). Although not consciously associative in Steiner's sense, this cluster approach does suggest an understanding of the power of facilitating joint consumption. A similar approach has been developed by the Association of Rural Tourism of Valle del Jerte (ATRVJ) in Spain. The ATRVJ represents 44 tourism and outdoor recreation businesses and acts as a promoter and manager of rural tourism in the Valle del Jerte. The ATRVJ sees its main function as developing information and helping its members develop their businesses in an associative manner involving much consultation with each other and with the local authorities (Romeiro and Costa, 2010).

The associative economy of Forest Row

Forest Row is a village of approximately 3000 residents on the northern boundary of the Ashdown Forest in East Sussex. Although it is certainly a commuter village (to both London and Brighton), it has

also developed a vibrant local economy founded on what are essentially open access recreational attractions – the Ashdown Forest itself and the 12 miles of Forest Way non-motorised shared use route. Although neither attraction charges for use, and although there are numerous free car parks adjacent to each of the attractions, visitors routinely spend a good deal of time and money in the village, and return regularly to enjoy their outdoor activities. When allied to local consumers, the level of demand is sufficient to support a dozen pubs, cafes and restaurants, a couple of small supermarkets, a bakery, a cycle shop and a range of shops specialising in local products (mainly food and crafts). Although there are few formal associations between the traders, all are acutely aware that they are jointly responsible for maintaining the customer base, while the shops selling local products enjoy symbiotic relationships with their suppliers and some intermediaries. Although margins on goods and services are generally low, certainly for the local foods, the traders also understand that keeping them this way encourages repeat business and the levels of turnover needed to survive. The traders are aware of the need to support each other in moments of vulnerability, such as the poor weather and harvest of 2012.

The result is a relatively buoyant local service economy that underpins the popularity of two outdoor recreation resources and provides a range of jobs for local people. Most of these jobs are permanent because there is relatively little seasonal variation in visitor numbers (although the poor summer weather in 2012 did affect visitor numbers

and thus the financial security of some businesses). The key to success is that there is easy access to the resources (good roads and free car parking) that encourages visitors to lengthen their visits and to return, and there are a sufficient number and variety of shops and other services that visitors can rely on having a choice, whenever they visit. Indeed, the village is now also becoming known as hub for local food, which encourages a new clientele who may be less interested in outdoor activity, but who want to participate in the local food culture while also enjoying a fine local environment. This is the very essence of a sustainable and associative approach to the local economy.

Discussion and conclusions

There is no doubt that provision for outdoor activities is an attraction for a broad cross section of people. Various surveys suggest that demand will become more localised in the next decade or two, mainly on cost, health and environmental grounds, and that many people will want to 'multi-task', even at leisure. This offers tremendous potential for numerous destinations which can capitalise on even modest attractions. As the Forest Row case suggests, free attractions can actually be beneficial for local economies because people will spend their money on services (if they are the right services) and will make repeat visits. Again, as the Forest Row case illustrates, a further key to success is to use the outdoor economy to develop additional attractions that underpin current consumption patterns while also attracting new consumers. Equally, by thinking broadly about the whole local economy, traders can establish ways of working that are beneficial to all. In this way, individual businesses may not be viable on their own, but when developed in association with others will benefit from footfall and customer levels that they could not achieve individually. As such, the outdoor economy has the potential to be a driver of local economic growth and jobs.



References

- ¹⁰ Romeiro, P. and Costa, C. (2010) The potential of management networks in the innovation and competitiveness of rural tourism: a case study on the Valle del Jerte (Spain). *Current Issues in Tourism* 13, 75-91.

Contact

Professor Neil Ravenscroft
School of Environment & Technology, University of Brighton
Cockcroft, Lewes Road, Brighton BN2 4GJ

N.Ravenscroft@brighton.ac.uk



Welcoming Walkers – using the Walkers are Welcome model to help grow the outdoor economy

Ruth Coulthard, Funding Development Manager, Brecon Beacons National Park

We are increasingly aware of the importance of our outdoor economy. In times of austerity, we look to our strengths and walking is a crucial part of the outdoor economy. It is estimated that walkers in England spend approximately £6.14 billion a year, generating income in excess of £2 billion and supporting up to 245,000 full time jobs. In Wales, there are an estimated 28 million walking related trips per year, 74% of holidays involve walking as a main or important part of their trip and direct spending on walking trips was £632m.

There is also potential for this to grow. Many destinations are developing increased opportunities for walking and marketing these to customers - new shorter routes are developed and apps and websites are being developed to make the walking product more accessible. In addition, in times of economic hardship, walking is perceived as a free activity and many are increasingly turning to it as a form of recreation.

However, walkers have a lot of choice with a huge range of walking opportunities on offer – driving quality and expectations up. To secure a long term environment for growth and jobs we need to ensure that when customers do arrive, they have a quality product on offer – and this is what the 'walkers are welcome' model hopes to achieve.

The Walkers are Welcome Idea

The concept was first developed in 2006 by the Yorkshire community of Hebden Bridge that wanted to make the town welcoming for visitors. They developed a six point scheme which they felt would make their town a quality destination for walkers. It is unique in that it isn't designed by officials or 'experts' but by those in the community – walkers, businesses and local residents. From there the network grew and there are now 100 accredited towns across the UK from Shetland to Cornwall.

The model is simple. For destinations to gain the award they have to meet six criteria.

- Demonstrate they have popular local support
- Gain endorsement from the Local Council;
- Develop actions to ensure the public path network is maintained in good condition;
- Market their Walkers are Welcome status;
- Encouragement walking with public transport
- Demonstrate they have a plan in place to maintain their activity

The overall aim of the scheme is to provide a toolkit for developing a 'quality' product for walking in destinations. It aims to strengthen their reputation as welcoming for walkers. In addition, by bringing people together, the scheme aims to harness the resources within that community. Community groups can offer excellent value for money and

are often able to access funding that public bodies cannot - plus they can often get things done quicker! We also have to accept that rights of way budgets are being cut and if we want to still have a quality infrastructure need to look to different models.

The model aims to provide a sustainable long term future for embedding quality. By creating local solutions with business and the communities – everyone gets to see the benefits and projects are more likely to succeed in the long term and a sense of place is developed.

In addition to all this, the network allows communities to benefit from regular networking too and share experiences formally and informally, promoting best practice across the country.

How it works

The network and scheme is administered by a national executive made up of volunteer representatives from member towns. We have a patron in Kate Ashbrook and Julia Bradbury is our official 'supporter'. Each year we hold a national get together for towns to share ideas and learning, plus a mentoring scheme exists for new towns and regular newsletter circulated. A new website has also just been launched at www.walkersarewelcome.org.uk.

Does it work?

Well, we now have 100 towns and many more applying. They have achieved a wonderful range of projects including development of long distance routes, walking festivals, packages with transport operators, improvements to footpaths, partnerships with health authorities, audio trails and even a walking themed beer! Much more than any statutory agency or single body could have achieved.

Nearly all towns have also seen a direct increase in numbers of walkers and this has not just been through walking festivals and events but from increased promotion of walking, creating new literature and promotion by other agencies. Local businesses, such as newsagents, have also seen growth and have been able to extend their range of goods to include maps and walking accessories, ensuring year round and longer term sustainability.

Awareness has been raised too and the Walkers are Welcome concept is becoming more widely known in the industry and amongst the public.

The future

Whilst the network has achieved success and continues to grow, there are challenges we need to overcome for the concept to move to the next level. The next stage will be to:

- Increase our brand recognition – amongst industry and public
- Increase opportunities for networking and best practice
- Increase support for our towns and maintain quality

The first area we need to work on is increasing public awareness of our brand both so the public know to look out for our mark and understand what it means, but also so that towns see the benefit of attaining this status and developing their walking product. However, there are a number of welcome schemes which can be confusing and, with no marketing budget, we need help from industry partners to spread the word to the walking community and potential visitors.

The second area is to become more effective at sharing ideas and learning. There is so much happening across the UK, and as the network grows the more resources and skills we have available to us. However, it also makes communication more challenging! We need to find ways to help our towns effectively communicate with one another – and are currently looking at social media to help manage this.

The third area is supporting each town and maintaining quality throughout the network. Each town has individual members with different skill sets but most are volunteers. Many can struggle with recruiting and retaining members of the committee, keeping cash flow coming in and sometimes trying to do too much. We need to find a way of ensuring quality is maintained. The brand's reputation is heavily reliant on each individual town – one or two poor examples could damage this.

As a national executive, we have good contact with our towns but find it increasingly difficult as the network grows to give individual support and carry out any direct quality control.

What next?

We continue to move forward and despite the challenge, are delighted the network is increasing. We have a new website which is more visitor facing, we have enhanced our yearly get together to maximise networking time and are investing in social media – hoping that this will bring benefits both in recognition and networking. In addition, we are exporting our concept – the Japanese government inviting one of our committee members to present this model later this year. We also are developing a business plan to see if we can find long term funding to employ a network coordinator which would help us overcome many challenges.

We look forward to working with the countryside community to develop and promote this concept and help develop a quality national walking product that will support our outdoor economy.



Economic Impact of Mountain Biking in Scotland

Graeme McLean, Project Manager, Developing Mountain Biking in Scotland

In 2001 when Foot and Mouth Disease (FMD) hit the South of Scotland it was the largest outbreak of the disease in recorded history. In the infected area it was the tourism industry which was hurt the most. The inability for visitors to enjoy the outdoors or the idea that the outdoors was inaccessible was the biggest contributor to the loss felt in the infected area. The total loss to the tourism industry in the South of Scotland was estimated at £48.89million¹.

Infrastructure investment was needed in the area to ensure that the tourism could recover from the effects of the disease. Enthused by developments in Wales, members of staff and keen mountain bikers of Forestry Commission Scotland hatched a plan. Local mountain bike trails were transformed into international standard mountain biking destinations. This resulted in the world renowned 7stanes.

Developments continued around in Scotland with trail centres being created in areas popular with existing mountain bikers. This included the Highlands and further remote areas in the Central belt of Scotland. The trail centres, combined with Scotland's world leading progressive access legislation, meant our country was gaining a worldwide reputation as a mountain biking mecca. Furthermore in 2007 the International Mountain Biking Association (IMBA) awarded Scotland with International Superstar status.

The economic benefits were noticeable, particularly in the South of Scotland. An economic study conducted in 2009 valued the impact of mountain bikers whose main reason to visit Scotland at 46.5m. When you include the wider market of those who participate in mountain biking, but not as their main reason to visit, the impact is an impressive 119m and creates 3,470 FTE jobs in Scotland. The study also predicted a continued growth of 30% by 2015².

Despite these successes, the initial lack of a strategic plan, largely resulting from the innovative nature of the trail centre developments, meant that the annual cost for maintaining and promoting free to use trails was becoming burdensome. This was especially true for the Forestry Commission Scotland (FCS) whom manage the largest amount of trails. As a result, FCS engaged with other national agencies and collaboratively they embarked upon developing a National Strategic Framework for Sustainable Mountain Biking – the first of its kind in the world.

Contact

Ruth Coulthard, Funding Development Manager / Rheolwr Datblygu Cyllid
Brecon Beacons National Park Authority / Awdurdod Parc
Ruth.Coulthard@breconbeacons.org rg.uk

References

- ¹ Strathclyde University. (2003). Economic impact of the 2001 Foot and Mouth Disease outbreak in Scotland. The Fraser of Allander Institute for Research on the Scottish Economy.
- ² EKOS. (2009). Economic value of mountain biking in Scotland. Scottish Enterprise



Rather than create the strategy and not implement its key recommendations, the partners (CTC, FCS, Scottish Natural Heritage, Scottish Enterprise and sportscotland) brought together a funding package and worked with Scottish Cycling to manage and drive forward the Framework. The delivery of the project was launched in 2010 and given the title Developing Mountain Biking in Scotland (DMBinS).

The focus of DMBinS is to drive the economy by capitalising effectively on the existing infrastructure, both from trail centres and the 'natural' routes in Scotland. By developing route cards of natural routes, informing businesses of the sectors requirements and encouraging collaboration between businesses we have continued to see the sector grow.

The Framework also identifies that it is not only tourism and economic development which mountain biking brings to Scotland. It is also the

opportunity for Scots to get on their bikes and be a happier and healthier nation and if they wish they also have the opportunity to progress to success on the world stage including the Olympics and Commonwealth Games.

Indeed with the upcoming 2014 Commonwealth Games in Glasgow another of the Frameworks targets, which is to create more mountain biking trails close to where people live, is beginning to be realised. These will continue to be developed across all the cities in Scotland, with a vision of cycling and mountain biking communities in our populated areas joined up to more remote trails. This will create opportunities for an increase in domestic tourism in Scotland. There is also potential for businesses within cities to promote mountain biking alongside city breaks.

Alongside the developments in our cities, the future of Scottish mountain biking will involve targeted promotion to new markets such as families and non-expert mountain bikers. With already improved and improving centre facilities like Glentress, Ae and Kirroughtree (all part of the 7stanes), Laggan Wolftrax and Nevis Range (in the Highlands) we are developing clean, stylish and modern facilities. Onsite bike hire and healthy cafes located at centres will further encourage a new audience to mountain biking in Scotland.

For the experienced mountain biker we are expecting to see an increase in trips into the 'wilder' areas of Scotland. With sensitive promotion of sustainable routes and advocating the use of guides to access stunning and remote areas of Scotland, we can help spread the economic benefits of mountain biking into the most fragile areas of our economy.

Another benefit of mountain biking and its promotion of a healthy outdoor lifestyle is the direct opposite of the tourism effect which was felt by Foot and Mouth Disease (FMD). The tourism industry, especially in rural areas, is built around the positive association of a location and the 'happiness' which is derived from the landscape. The FMD epidemic resulted in horrific images revealed in the media. This portrayed a rural disaster amplifying the effect FMD had on the economy³. However the opposite is also true whereby positive portrayals of active enjoyment of the outdoors in an open and accessible countryside evokes feelings of happiness. Ultimately this will 'pull' the visitor to come to Scotland to enjoy our beautiful environment⁴.

References

- ³ Irvine, W. & Anderson, A.R. (2005). The Impacts of Foot and Mouth Disease on a Peripheral Tourism Area: the Role and Effect of Crisis Management. *Journal of Travel and Tourism Marketing*. p.1-17.
- ⁴ Robinson, P. (2008) The role of imagery in tourism marketing. [online]. *Tourism Insights*. Available at: <http://www.insights.org.uk/articleitem.aspx?title=The%20Role%20of%20Imagery%20in%20Tourism%20Marketing> [Accessed on 24.02.2013].

Contact

Graeme McLean,
Project Manager Developing Mountain Biking in Scotland
graeme.mclean@scottishcycling.org.uk



How can the public sector help stimulate economic growth Case study: The Helix, Falkirk

Richard Millar, Head of Enterprise, Scottish Canals

The impact of the Scottish canals has always extended far beyond the bankside. Two hundred years ago, through the vision of powerful merchants and the brawn of thousands of navvies, these marvels of engineering and architecture were hewn across countryside, coast to coast, city to city to power the Industrial Revolution.

Born of the Scottish Enlightenment, the five Scottish canals were vital arteries for the transportation of coal, food and raw materials for domestic use and export and they flourished for some hundred years or more before the rapid creep of rail and road. Catalysts for the growth of some of Scotland's largest towns and cities, during their heyday they generated huge wealth for the merchants but contributed to some serious social problems for the canalside communities along their banks.

Today, the Scottish canals are revitalised and reinvented. Dynamic waterways once again, this time they stimulate sustainable economic development, regeneration and placemaking, visitor and marine tourism, active living, sports, education, heritage and biodiversity. They contribute economic as well as social and environmental benefit for the waterside communities, some of which, such as Maryhill and Wester Hailes in the central belt of Scotland still suffer from significant challenges.

What does economic growth on the Scottish canals look like in hard currency? In the decade between 1999 and 2009, research has shown that the renaissance of the Scottish canals stimulated a staggering £377 million in private investment along their banks as well as 2,000 new homes, over 100,000 square metres of commercial floor space and almost 4,000 full time jobs.

Importantly to this we should add the cost savings generated for health agencies through the provision of a traffic-free, high quality public realm for exercise, sports, active recreation and sustainable commuting.

Research shows that the 137 miles of towpath do not only attract those who already exercise to relocate to the safer, canalside environment but critically encourage the inactive to get outdoors and exercise.

Indeed, almost 3.9 million additional person kilometres of travel are stimulated each year and this equates to a physical health benefit of £6.4 million for national and local health agencies. The multi-use surface of the towpaths also remove over 1 million cycle kilometres from the roads, with an annual safety benefit of £220,000.

Scottish Canals, which is responsible to the Scottish Government for the management and development of the canals (four of which are Scheduled Ancient Monuments), surrounding estate and The Falkirk Wheel, has driven this significant economic value from the canals over the past decade by developing a country-wide and innovative partnership network.

Today, the organisation has more public, private and third sector partners than ever before and forward looking partnerships are now well established with each of the nine local authorities which have a canal within their catchment.

The partnership between Scottish Canals and Falkirk Council is a superb example of the economic growth and associated public value which can be achieved by working together, pooling resources and bright thinking, connecting assets and joining together with collective boldness and vision.

Together, the partners have made huge progress in developing a strategic framework for sustainable economic development along the canal corridor which occupies key gateway locations between The Falkirk Wheel and Grangemouth.

This framework meets the synergetic objectives of both partners in stimulating economic growth, community connectivity and cohesion and healthier lifestyles.

Fruits of this partnership include the forthcoming restoration of the B listed Rosebank Distillery and 'Portdownie'. Built in 1817, Rosebank will soon be alive to production once again as a microbrewery with visitor centre.

'Portdownie', a 58 acre waterside development will, when built, extend out from The Falkirk Wheel and include 325 new homes and a

commercial hub centred on a new marina with hotel, leisure and retail opportunities.

The largest partnership project to date however is the £43m Helix, a vast 'people's park' on the Forth & Clyde Canal which is due to open this summer.

Watching the major transformation of 100 acres of industrial scrubland it is hard to believe that it was only 2007 when Falkirk Council, Scottish Canals and the Central Scotland Forest Trust came together with a bold vision to create the Helix, as a major recreational and commercial hub for 16 local communities across Falkirk and Grangemouth and a major new tourist attraction for the region and Scotland as a whole.

That year, the partnership successfully secured funding of £25m from the BIG Lottery Fund's Living Landmarks Programme, the largest single award made to any one project at that time.

The Helix, which will attract an estimated 300,000 visitors a year, will stimulate economic growth through tourism, leisure and sport, the social enterprise economy and through the provision of opportunities for cultural and creative industries to flourish.

As well as 27km of pathways, forest, lagoon, wetlands, event space, public artworks and allotments, the Helix will feature a vibrant canal hub at its heart.

This waterside leisure and tourist destination on the Forth & Clyde Canal is already beginning to take shape and will soon feature business and visitor amenities as well as two towering, 30 metre high steel horse heads, the 'Kelpies'.

Three important aspirations and guiding principles shared by all the partners underpin The Helix – People, Place and Enterprise. All have a role to play in stimulating economic growth.

For the Helix, Place reflects the objective of creating a new gateway to Falkirk and Grangemouth, a new identity which inspires confidence locally and positions the area as a high quality visitor destination. It also reflects the partners aspirations to drive connectivity between local communities and across a sustainable, biodiverse landscape.

The 27km of pathway and high quality towpath within the Helix, for example, has onward connections into a wider network of some 400km of walking and cycling routes and visitor attractions across the area including The Falkirk Wheel and Callendar Estate. Not only will this connectivity give communities accessibility into the Helix and stimulate active living, it will extend the potential dwell time for visitors to the park and waterscape and spread the tourism spend out wider than the Helix.

For Scottish Canals, Place is as much about stimulating tourism on the water as on land. Whilst the Lowland canals of Scotland were reopened a decade ago through the £83.5m Millennium Link Project, the route towards the eastern entrance remained tricky due to a series of utility pipes and motorway.

Through the additional investment leveraged by the Helix, a new sealock and canal extension take the canal closer to the original course and, in so doing, will offer sailors on the East Coast comfortable access to the canal network. Importantly, the new entrance along with the canal hub and Kelpies, when they open fully in Spring 2014, will encourage greater boating activity on the neighbouring Firth of Forth, something Scottish Canals is keen to support.

The pillars of People and Enterprise are also closely linked. The Helix is rooted in the community. The ambition has always been that it is a place people and local business can be proud of and want to be involved with. Over the development period of the past few years, much progress has been made in engaging the community in helping shape the Helix through public artworks and volunteering and creating exciting opportunities for community groups, social enterprise and small to medium sized sports, retail, leisure and tourism businesses.

Opportunities range from bee-keeping, market garden and biofuel initiatives through to water-based sports and leisure hubs beside the lagoon and over 450 square metres of catering and retail space at the canal hub. The event space has also been designed to attract performances of both local and national scale.

A programme to promote and support social enterprise is also well advanced with a free four-module programme 'Developing Your Social Enterprise' led in partnership with the Social Enterprise Academy up and running.

Opportunity is, of course, equally about providing training and development for the surrounding communities and a successful Intermediate Labour Market programme has already led to an SVQ Level 2 in Landscaping for local apprentices.

Bold innovation and daring is at the heart of the Helix and no other element reflects that more keenly than the 30 metre high shimmering steel horse heads which will sit abreast the canal hub and host a visitor experience within.

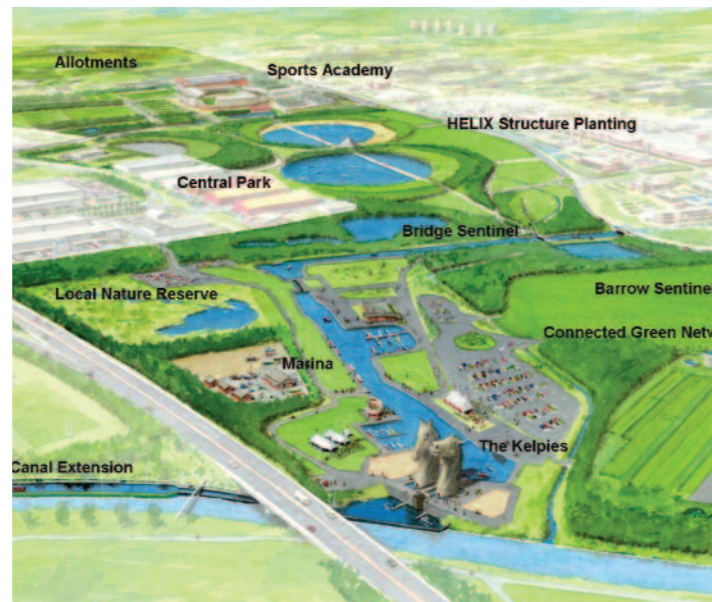
The inspiring combination of art and water has been with us for centuries from the Colossus of Rhodes in Ancient times to more recent

examples such as the Statue of Liberty, the Venice Biennale and Antony Gormley's 'Another Place' on Crosby Beach. The 'Kelpies', which feature thousands of plates of stainless steel will be the largest public artwork in Scotland when the installation is completed later this year.

Designed by leading public artist, Andy Scott, these spectacular, towering landmarks will be seen across the landscape and attract thousands of motorists passing close by on the M9 motorway to stop and visit the Helix.

The Kelpies is one part of a major public artworks programme across the Helix. The horse heads, one rearing, one in repose, might be the anchor of this inspired parkscape but there are a variety of important artworks peppered throughout the site, from temporary exhibitions by local art galleries through to Love and Kisses, an installation reflecting the healed relationship between local communities of Langlees and Bainsford.

The Helix has invested significantly in public artwork as a fundamental driver to the success of the park and waterscape. It's no coincidence that scale models of the Kelpies are currently on display in America as part of the renowned Annual Chicago Sculpture International Outdoor Exhibition. Chicago is a city which has invested heavily in public art in recent years as a successful catalyst for community cohesion and sustainable economic development. It's symbolic for the Helix and the partnership behind this trailblazing project that the Kelpies are the only non-American artwork invited to take part.



The economic value of outdoor recreation in Northern Ireland

Mike McClure, Sport NI

(Based on the conference presentation by Chris Gratton, Professor of Sport Economics, Sheffield Hallam University)

In 2008 Sport NI commissioned the Sports Industry Research Centre (SIRC) Sheffield Hallam University to carry out a study into the Economic Importance of Sport in Northern Ireland. This study found that sport overall generates 17.9 thousand jobs (2008), and £688m consumer spending. In 2012 Sport NI along with the Northern Ireland Environment Agency and the Northern Ireland Tourist Board commissioned SIRC to capture the specific economic value of outdoor recreation in Northern Ireland.

The starting point for the study was to define outdoor recreation. 'Outdoor Recreation encompasses all sport and physical recreation that takes place in the natural environment whether on land, water or air. On land it includes but is not restricted to venues such as forests and woodlands, uplands and open land, caves, beaches and urban parks but also includes activities that take place on trails. In water it can include coastal waters, lakes and rivers and can be on or under the water.'

It should be noted that the study explicitly did not include golf (as this takes place on a "pitch"). The study also did not include hunting of live quarry as these activities are not recognised by the Sports Councils in the UK.

Most UK and European studies on the economic impact of sport use one or more of three indicators:

- Consumer spending on Outdoor Recreation.
- Employment related to chosen sports activities.
- Generated Gross Value Added.

Therefore the approach that was taken for this study was to follow this approach and therefore the study can be benchmarked effectively against other countries or sectors that carry out such studies.

Both consumer spending and employment may have a **direct element**, for example spending on bicycles and associated employment, and an **indirect**, for example accommodation expenditure during an Outdoor Recreation holiday.

The consumer sector relates directly to households, while Outdoor Recreation employment is the result of interactions among the consumer, commercial, public and voluntary sectors.

Contact

Richard Millar
Head of Enterprise, Scottish Canals
Richard.Millar@scottishcanals.co.uk
Canal House, 1 Applecross Street, Glasgow G4 9SP



Closely associated to employment is the concept of the generated **Gross Value Added** by the Outdoor Recreation sector. In general, this outdoor recreation related value added is the most comprehensive statistic of economic value as it corresponds to Gross Value Added (GVA) in the economy as a whole. It shows the contribution of the outdoor industry to the economy and is measured as the sum of wages and profit surplus in the Outdoor Recreation sector, adjusted for the inclusion of value contributed from Lottery projects.

In terms of the year of reference, the study, given **current** data availability, could only be conducted for the year **2011**; a good indicator is the data availability of the **Family Spending** ONS publication (latest: 2011 data).

The methodology described above is known as the national income accounting model, which is consistent with the UK National Accounts. It allows for a division of the outdoor recreation economy into seven sectors as follows:

- **Consumers:** Shows mainly Outdoor Recreation related expenditure, e.g. spending on clothing and footwear for outdoors.
- **Commercial Outdoor Recreation:** Includes sports good manufacturers and retailers and significantly in Northern Ireland this includes Chain Reaction Cycles.
- **Commercial Non-Outdoor Recreation:** Includes suppliers for the

production of outdoor recreation related goods and services. An example is a commercial company sponsoring a sailing club. The advertising revenue received by the club, represents a flow from the commercial non-OR to the voluntary OR sector.

- **Voluntary:** Includes non-profit making sport organisations such as amateur clubs run by their participants. According to the Trends of Outdoor recreation research (2008), the number of outdoor clubs increased from 193 in 1995 to 210 in 2008.
- **Local Government:** Includes income from local government outdoor recreation facilities, related grants from the Central Government and rates from the commercial and voluntary sector. The sector has expenses such as wages for labour (a flow towards consumers) and grants to the voluntary sector.
- **Central Government:** Includes taxes, grants and wages on outdoor recreation related activities. For example a person buying a mountain bike, records two flows: one towards the Government sector as VAT, and another towards the Commercial sport sector for the remainder of the price.
- **Outside the Area Sector.** This includes all transactions with economies outside Northern Ireland.

The methodological consistency with the historical economic impact of sport studies enhances comparability and policy conclusions. For example, a way to assess the economic impact is to use employment and GVA to compare Outdoor Recreation to other economic sectors in Northern Ireland.

The model is purposely structured to **avoid double counting**. There is no adding up of the incomes of individual sectors as they are all interdependent in a transparent way. Adding up takes place only in the cases of employment, profits and wages per sector, generating the GVA and employment estimates.

Beyond the 'traditional' economic impact, **voluntary non-paid work is used as a proxy for generating an alternative value of extra value added**. This can be done by treating the voluntary workers as hypothetically paid at an average (or minimum) salary according to the number of hours worked. This would give an indication of the total 'value' produced outside the monetised market. The requirements for this are an estimate of the total number of volunteers in Outdoor Recreation and the average number of hours worked per volunteer.

The data on these sectors were gained through a combination of desktop research into existing data sets and official statistics but also through bespoke surveys of the voluntary clubs and the outdoor centres. Figures for businesses were also gained through a search in Companies House records.

International trade statistics were used for the UK as a whole, which provide sufficient information to distinguish the outdoor recreational element out of total sport related imports – primarily footwear and clothing and then this data was extrapolated for Northern Ireland.

Two important categories of outdoor spending are on boats and bicycles and there are number of publications that can be used to model this market including Family Spending, Sport Market Forecasts, Consumer Trends and British Marine Federation reports.

Invaluable information for modelling the commercial sector is provided by the Annual Business Survey – Regional extract. In this the Northern Irish economy is classified by economic sectors (including a sport element). In each case there is a total turnover, Gross Value Added, purchases of inputs and wages. On this basis the income of the commercial sector into profit, wages and other input spending was classified.

Additionally the plethora of sports statistics and tourism information used in the Northern Ireland sport economic assessments of the past decade were also used. Relevant data sources included: **Regional Trends, Annual Survey of Hours and Earnings** (providing the basis for the estimation of average wages per profession), **Regional Accounts, Local Authority Accounts, and Travel Survey**. The Annual Survey of Hours and Earnings gives both employment estimates and wage averages for full time and part time work classified by employment and nationality. A division of the total Wage bill by the NI full time average wage in services provides the level of full time equivalent employment. The ONS publication Travel Trends gives an overall view of Tourism in Northern Ireland. This can be combined with the Tourism Satellite Account (2005) and 'The UK Tourist Statistics' to model and check flows of tourist spending, and the Travel Survey for Northern Ireland for the travel spending generated through visiting outdoor destinations. The UK Tourist also includes data on accommodation and camping expenditure. The NI Visitor Attraction survey classifies tourism according to general destination (including Parks). Other relevant information is included in 'Domestic Tourism Estimates, Northern Ireland, 2011' where holiday activity is distinguished according to the purpose of the holiday (including being physically active, hill walking, and rambling).

The distillation of all this data to ensure that relevant sets are used specifically for outdoor recreation in Northern Ireland is currently being undertaken and once complete a full report on the economic impact of outdoor recreation will be available at: <http://www.sportni.net/about/PolicyAndResearch/Recent+Research/> by the end of June 2013.



Article author:

Mike McClure, Outdoor Recreation Development Officer, Sport Northern Ireland
mikemclure@sportni.net

Conference speaker:

Chris Gratton, Professor of Sport Economics, Sheffield Hallam University
C.Gratton@shu.ac.uk



Conference Workshop Feedback Session

During the workshop session, delegates were asked to talk about what their own organisations are currently doing to stimulate and further economic growth through their remit for outdoor recreation. They were then asked what barriers need to be overcome in the outdoor recreation sector that will improve and contribute to economic growth. Each group presented their key ideas to the conference.

Key points fed back from each group:

Group 1 – facilitated by Caro-lyne Ferris, Outdoor Recreation Northern Ireland

- The outdoor recreation industry needs to be represented through one voice, enabling clearer articulation of the associated benefits to ministers and funders.
- Funding programmes and their respective timelines need to be more streamlined so that match-funding becomes less of an issue.
- There needs to be recognition that the economic benefit of outdoor recreation does not only come from tourists. It also comes from local people too, and as such, product development should reflect this.
- There is a need to preserve and protect the natural environment within which outdoor recreation takes place.

Group 2 – facilitated by Ruth Coulthard, Brecon Beacons National Park Authority

- Public sector needs to streamline its processes to make working with the private sector more feasible. This should include the sharing of risks and skills.
- Outdoor recreation needs one coordinated national strategy. This should be based on pooled research which demonstrates return on investment in outdoor recreation.
- We need to define and create a strong outdoor recreation product which is customer focussed. While Destination Management Organisations are market focussed, there is a need to invest money back into the product.

Group 3 – facilitated by Mike McClure, Sport Northern Ireland

- Partnerships are key
- We need to communicate more effectively with the government and the public - in terms of the value of outdoor recreation.
- Planners need to be involved with greenspace planning at an early stage.

Group 4 – facilitated by James Ogilvie, Forestry Commission Scotland

- A joined-up partnership approach to growing the outdoor industry is required. This should be one strong, coordinated voice to the government, the public and itself.
- A cabinet minister for the outdoor economy is needed. They should be responsible for the success of this sector, in delivering health, tourism and environmental improvements. They should direct the appropriate funding and coordinate activities.
- We should demand that education of all children includes the experience of the outdoors as part of the curriculum.

The Outdoor Industries Association (OIA) attends the CRN conference



Andrew Denton,
Chief Executive, OIA

The OIA were pleased to attend the CRN conference and look forward to working productively towards a unified voice for the outdoor recreation sector. The OIA is the trade body that aims to 'Engage, Support, Unite and Represent the outdoor Industries'. Traditionally it has come from the Outdoor equipment and retailer members, but is now growing to include the whole 'Outdoor Economy'

There are significant commercial and networking benefits for any company or organization to joining the OIA and we would urge anyone who attended the CRN conference to join us - there is strength in numbers and we have considerable momentum now to promote the Outdoor Economy - together we can make a united case.

Recently we have launched a nationwide campaign called Britain on Foot. www.britainonfoot.co.uk

With 200 members as diverse as Berghaus to Blacks, The Ramblers to the BMC, from the National Trust to the Camping & Caravan Club, the OIA truly represents the Outdoor Economy.

This is a consumer campaign with the clear single goal to get more people active Outdoors. It is an umbrella call to action, that links the hundreds of brands, retailers, clubs and organizations in the sector and encourages projects that get new people active Outdoors. Significant industry seed money has gone into it, plus a small Sport England grant, we have sign up from dozens of organizations, and will be launching to the public in the first week of May. The Website will be fully open by end of March but right now you can download the brand guidelines the launch documents full of useful stats and information on the campaign and generally start to plan your own involvement.

For a year now we have been working with government, talking to MP's, Ministers and even into Number 10 explaining and pressing the case of the Outdoor Economy, our value to Great Britain's economy, the benefits to the Rural economy to the tourism sector, and of course to the health of the nation.

So go on, pull on those walking boots and jump in with both feet!

We have begun to network with the Sport and Recreation Alliance, the Federation of Sport and Play and UK Active as well, working with the Department of Health and Change 4 Life trying to get over the case for informal recreational activity, as an alternative to Sport to get the nation healthier and happier.

For more information contact Andrew Denton
andrew.denton@theoia.co.uk www.theoia.co.uk



Bringing it all together

Key conference messages

A number of common themes cropped up during the presentations and in the workshops and plenary session. The four most significant key messages are summarised.

1. The outdoor recreation sector needs a unified voice

A strong and unified national representation would ensure that the outdoor recreation economy was factored into important decisions. The sector needed to confirm what defined the outdoor economy and develop a clear message to raise the profile of its significance. The audience for the message included local, national and European government as well as Local Enterprise Partnerships, Local Nature Partnerships, Local Access Forums and Health and Well-being Boards.

A voice representing the sector would not only make the case for investment in the outdoor economy, but could also advise on matters that may impact on the sector such as getting the right message to the public about avoiding the spread of plant and animal disease without deterring visits to the natural environment on which the outdoor economy depends.

The conference heard many examples of where small public investment had helped grow businesses:

- providing land - the Forestry Commission provided long term lease of land to GoApe;
- creating a destination focal point - following the success of the Falkirk Wheel, Scottish Canals are bringing together funding to create the Helix - a vast public park for people;
- providing facilities - the impact of Foot and Mouth Disease inspired a group of public sector partners invest in mountain biking facilities in Scotland which has revitalised the outdoor economy.

The sector is worth many billion to the economy. Visits to the natural environment are valued at over £20 billion per year by Natural England's annual omnibus survey MENE and this excludes overnight stays and spend on equipment, clothing etc. There is evidence of many more indirect benefits such as improved health and well-being. The outdoor recreation sector is recognised in many other parts of world. A single unified voice for UK outdoor recreation could significantly raise the profile of the sector.

2. Collaborative working is important

The conference heard examples of where partnerships had helped to grow the outdoor economy.

Walkers are Welcome provided a good example of where local communities had worked together to develop walking destinations which revitalised local market towns. The concept of the Associative Economy was introduced by Professor Neil Ravenscroft who demonstrated how the outdoor economy can be a means to driving this, leading to more spend staying within the local economy. With careful consideration, the benefits to a range of small businesses, such as service providers, artists and craftsmen can be significant where these are clustered around a destination.

A culture where business ventures are encouraged and supported would inspire more growth and the public sector was encouraged to be braver in supporting innovation by sharing the risks with the private sector. Funding bodies could also work together more effectively to streamline processes and timelines to support the outdoor economy.

3. Quality and reputation are fundamental to successfully expanding markets

Investing in quality outdoor recreation destinations and associated products encourages both repeat customers and expansion to new markets. Visit England identified the potential to expand the outdoor economy particularly through extending stays and increasing the range of all year and non weather dependant activities.

A quality experience relied heavily on the natural environment which needed to be managed carefully, preserved and protected.

4. Better evidence about the economic value of outdoor recreation is required

Different measures are used in assessing the value of the outdoor economy and a number of government agencies collect relevant data in a variety of ways and for different purposes. Combining this into a single narrative could be helpful. Case stories about successful, as well as failed, business ventures can also be useful way to share experience (celebrate failure and learn from the mistakes!)

Sheffield Hallam presented the early results from a study they were conducting in Northern Ireland which aimed to assess the value of outdoor recreation using standard methods of measuring increases to the Gross Domestic Product.

The significance of visitor spend to local communities and individual businesses was acknowledged as important particularly where spend associated with increased footfall remained within the local economy. Various indirect non market benefits accruing from outdoor recreation were also mentioned during the day, such as to individual health and well-being, the contributions from volunteers, the importance of visitor spend in keeping rural services viable and in supporting the case to invest in the protection of the nation's environmental, historic and cultural heritage.

In summary

There was enthusiasm from conference delegates to develop a unified voice and work together across the private, public, academic and voluntary sectors to raise the significance of the outdoor economy and to seek ways to help it to grow. The benefits to society as well as the economy justified the effort in doing this.

Wendy Thompson

CRN Member, Conference Journal Editor



May I pick your brains?

CJS was established 19 years ago as a specialist recruitment focused newsletter for countryside staff. In the following years the size, number of publications, scope and reputation of CJS has grown.



We have published editions of CJS Focus periodically since the first in November 2004. All have been well received by the industry and our readers. The most recent edition published on Monday 18 February focused on Volunteering. Other areas previously featured include Trees and Hedges in association with the Tree Council, Outdoor Recreation in association with the Campaign for National Parks, Water in

association with the Canal & River Trust and Farming & the Environment in association with the Campaign for the Farmed Environment.

We are now producing a Focus on Visitor Management & Engagement in affiliation with the Association for Heritage Interpretation, this is the first time we have covered this topic so I am looking for lots of feedback from people working in this field. I have some articles in mind including, knowing your audience and using this to the benefit of the organisation; is it best to tailor your visitor experience to your specific visitor? Although a bit of a luddite myself I know there are many technologies available to enhance the visitor experience, I have an article confirmed on the various different technologies available to organisations in the way of interpretation. In our daily collation of conservation news we see that there are often conflicts between visitors and the natural environment, how do you provide the best access and greatest enjoyment to the public whilst protecting the natural environment you are working to conserve. We are also looking for something about managing a honey pot site and mitigating the inevitable effects of heavy footfall. Many sites run an events programme, but is it worth it? Does it draw people in and improve access to your site or is it a lot of work for not much return.

Although we work with many professionals across the countryside conservation sector, we do not have the specialist in-depth knowledge of this particular aspect and that's where you come in. Tell us what you'd like to see, suggest sources or even send us your adverts.

This edition will be published on 10 June 2013 in addition to all these informative articles there will be adverts for relevant companies, products, services & websites.

Please have a look at previous editions on <http://bit.ly/FocusInfo> and click through for more information.

- Can you suggest any topics you'd like to see covered?
- Are you interested in providing an article for this publication or a future edition (next topic alien species)?
- Would you like to send a free advert?

Please feel free to contact me at the email address below or get in touch via LinkedIn.

Thanks for your time.

Amy Worley, CJS Focus Co-ordinator

Amy is on LinkedIn

focus@countryside-jobs.com

For more information contact:
Countryside Recreation Network
C/o Outdoor Recreation NI
The Stableyard, Barnett Demesne, Belfast BT9 5PB

T: +44 (0)28 9030 3937
E: kathryn@countrysiderecreation.org.uk
www.countrysiderecreation.org.uk