

Communicating the economic impact of outdoor recreation

The logo for the Sport+Recreation Alliance is positioned diagonally across the center of the slide. It consists of the words "SPORT+", "RECREATION", and "ALLIANCE" stacked vertically in a bold, white, sans-serif font. The text is set against a background of several overlapping, diagonal stripes in shades of blue, green, and yellow. The stripes create a sense of movement and energy.

**SPORT+
RECREATION
ALLIANCE**

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Aim and outline

Aim: To introduce the Alliance's research project aiming to communicate the economic impact of outdoor recreation

Outline:

1. Who we are
2. Why this project?
3. How have we approached it?
4. What have we found?
5. When will the project be complete?
6. Future research priorities

1. Who we are

- The umbrella body for sport and recreation
- Everything from archery to Zumba
- Protect, promote and provide for the sector
- Five members of the policy team:
 - Making the case for the sector
 - Developing evidence-based policy
 - Influencing government decisions



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2. Why this project?

Internal drivers:

- A clear demand from our members
- Our long-term goal to 'make the case'

External drivers:

- Challenging political environment
- Challenging economic environment

A basis for future lobbying

3. How have we approached it?

Context: Limited resources

- A literature review of existing evidence
 - Pulling together what we know and putting it in one place
 - Bringing data to life with case studies
- Partnership approach:
 - Liverpool John Moores University
 - Outdoor Industry Association
 - Natural England
 - Visit England, Sport England, ONS
 - Our members

4. What have we found?

Caveat one:

- No accepted definition of outdoor recreation, so ours inevitably reflects our own membership
- “Any physical activity which has the enjoyment of the natural environment at its heart”

Caveat two:

- A work in progress
- No title or structure decided, but plenty of content

Participation

Outdoor recreation matters to the population

- MENE Survey:
 - In England 55% of us are frequent visitors to the natural environment
 - 42m adults in England went on 2.85bn visits
 - They spent an average of £7.37 per visit
 - They visited for 2hrs 7mins on average
- Outdoor recreation participants - APS:
 - Over 25m including recreational walking
 - Over 7m excluding recreational walking
- Other estimates:
 - 3.5m horse riders
 - 1.4m licensed anglers – as many as 4m



Tourism

The great outdoors is a key driver of tourism.

- Domestic trips:
 - 49.5m overnight trips involved outdoor recreation in 2012
 - Accounted for a spend of £9.93bn
- Inbound visitors:
 - 1 in 4 visit parks and gardens
 - 1 in 5 walk in the countryside
 - Walkers linger longer and spend more
- Activity holidays:
 - 1 in 8 holidays taken by Britons
 - £14bn spent at home, £23.bn abroad
- Camping and caravanning:
 - 71m nights spent camping in Britain in 2010
 - Campsites more popular than B&Bs
 - Contributes £40m to UK GDP





Employment

Outdoor recreation creates jobs

Estimates for “outdoor industry”

- 26,000 people directly employed
- 61,000 volunteers + seasonal positions

Estimates for manufacturing and retail

- Top 13 retailers employed 9000 staff in 2008/09
- £511m in wages

Other estimates

- 31,000 FTE employed in shooting
- 28,000 job supported by horse riding
- 23,000 jobs within the ‘cycling economy’
- 12,250 FTE employed in angling
- 100,000 supported by England Coast Path?

Health and wellbeing

The outdoors is a natural health service

A growing body of evidence for the impact of the outdoors for health and wellbeing:

- UK National Ecosystem Assessment
- Academic research
- Think tanks and charities
- Major studies assessing impact of physical inactivity at population-level.



5. When will it be complete?

- A work in progress
- Publication before Easter
 - Glossy report
 - Evidence pack
- Campaigning leading up to the General Election 2015
 - Manifesto to be launched autumn 2014

Your feedback is welcome

6. Future priorities

1. Can we find an agreed definition of outdoor recreation and apply it consistently?
 - A clearer indication of participants in the sector
 - A clearer indication of economic footprint, including employment
2. Can we demonstrate the contribution of outdoor recreation to tourism more clearly?
 - A clearer representation of the contribution to rural economies
 - A more robust set of data to catch government's attention
3. Can we generate more evidence on the inland waterways?
 - More evidence of economic and social benefits

Any questions?

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