A Review of the Economic Value of Countryside Recreation and Sports

EXECUTIVE SUMMARY

Ian D. Rotherham, David Egan, Helen Egan

Tourism and Environmental Change Research Unit
Sheffield Hallam University
Howard Street
City Campus
Howard Street
Sheffield S1 1WB

Tel: 0114 225 2874 (Ian Rotherham)
Fax: 0114 225 2881

EMAIL: i.d.rotherham@shu.ac.uk

September, 2006
EXECUTIVE SUMMARY

INTRODUCTION

This Study was commissioned by the Central Council of Physical Recreation to investigate the extent of the evidence available on how sport and recreation in the countryside impact on the economy of countryside areas. It has not involved any primary research, but has investigated and collated a wide range of previous research studies that have addressed aspects of economic impact. These have ranged from national studies on economic impact that have identified ‘countryside’ factors to small local studies of the impact of specific sites.

The data contained in this executive summary are not explicitly referenced back to their sources; this information is given in detail in the main body of the report and in the references and glossary sections at the end of the main report.

BACKGROUND

The research reported in this Report was based around a number of key questions, the primary one being “how important is the countryside recreation and sport sector and its component industries?”

In order to adequately answer this question a number of subsidiary questions were developed to guide the content and direction of the research. These are set out below and act as a 'contents list' for the first part of this Executive Summary

1. How large is the countryside recreation and sport industry-related activity in relation to the rest of the economy?

2. What is the economic impact of the countryside recreation and sport sector or its component industries?

3. How many jobs depend on the countryside recreation and sport sector or its component industries?

4. What is the scale of voluntary and community involvement in the countryside recreation and sport sector or its component industries?

5. What is the scale of activity related to the countryside recreation and sport industry sector or its component industries compared with that other related areas such as advertising, media, clothing and footwear manufacture, equipment manufacture etc?

6. What does the countryside recreation and sport sector or its component industries contribute to Government finances or to meeting other targets?

7. What are the local or regional impacts of the countryside recreation and sport sector or its component industries and its contribution to rural life and communities?
8. How does the countryside recreation and sport sector or its component industries relate to other agendas such as health and quality of life?

THE KEY FINDINGS

Definition and size of the countryside recreation and sports economy

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

The sport and tourism sectors provide useful context and comparison. Sport has £13 billion per annum of consumer expenditure; tourism has a turnover of £53 billion per annum; and creative industries £60 billion per annum. In this review the value of the contributions by countryside recreational and sports organisations from a modest sample, showed an annual economic turnover of £850,000,000 as a minimum figure. The Leisure Day Visits Survey for England, Wales and Scotland (2002-3) indicated a spending power of around £17 billion per year through countryside leisure activities. Working for the Countryside - A strategy for rural tourism in England 2001-2005 (2001) showed rural tourism in England valued at £12 billion per year. Much of this comes from countryside recreation and sports. From a straight comparison of basic data, this is on a par with the wider sports economy.

Levels of participation in countryside recreation and sport - organisations, participants, members, and volunteers

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

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

What is the economic impact?

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

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

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

**The impact on employment**

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

**The value of voluntary contributions**

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

The 'added value' from countryside recreation and sports

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

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

The contributions of countryside recreation and sports to the Exchequer

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

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

THE NEXT STEPS

The research has identified a number of issues that have an impact on assessing and monitoring the impact of the sector and these are summarised in this section.

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

- **Consumer**;
- **Commercial countryside recreation and sport**;
- **Commercial non-countryside recreation and sport**;
- **Voluntary organisations, clubs and governing bodies**;
- **Central government**;
- **Local government**;
- **Overseas**;

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

For a broad and divergent sector such as countryside recreation and sport, this raises logistical issues and there are lessons to be learnt. The Leisure Industry Research Centre and Cambridge Econometrics have both produced reports on ‘sport’ that consider issues of regional versus national needs and datasets, and this is transferable to countryside recreation and sport. It is also pertinent to address issues of geographic or spatial scope. The validity and ease of economic impact assessment may vary depending on the spatial definition chosen. Therefore, to assess a local impact of a countryside recreational activity in a village in Cumbria can be relatively straightforward; transferring this up to the Cumbria region is feasible and has been done. Placing this within a national context is more difficult. Issues and impacts can be raised in broad and general terms, but the difficulty in assembling national datasets causes serious concerns.

At a simplified level, it is useful to consider the broad ‘sectors’ that make up the provision of countryside recreation and sports activities. This is the standard, broad-brush description used for component and related activities such as sports,
and for nature conservation. The broad areas of definition are the three core groupings: the private (commercial) sector, the public sector and the voluntary sector.

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

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

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

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

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

Increasingly local authorities are directed to maximise financial gains from their facilities. Since the 1970s, there have been serious pressures on local government budgets that have affected how local authorities support countryside recreation and sports. Provision of Country Parks, Countryside Management Services, and Outdoors Centres, were all badly affected during the 1980s and 1990s. Yet Local Authorities support core facilities and resources and seek to provide for socially disadvantaged groups who are unable to join clubs or pay commercial rates. Additionally, of course, local authorities are the major providers of education and supporting resources.

The impact of these pressures on local authority budgets, from the management of urban Victorian Parks and green spaces, through to provision in National Parks is considerable. Surprisingly, in debates on these important issues, economic impacts of countryside recreation and sports are rarely considered. This report to the CCPR and Sport England will help remedy the situation.
Government agencies and organisations, such as Sport England, Natural England (newly created from the Countryside Agency and English Nature), the Environment Agency and the Forestry Commission are major players in this area. However, it seems that many have been slow to recognise their roles and the associated economic and social impacts. However, Natural England will be a leading agency for this work once it is formally established.

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

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

CONCLUSIONS

Policy, Strategy, and Investment

The evidence in this research demonstrates the importance of countryside recreation and sport at many levels. There are major benefits of social cohesion, community engagement and for health and fitness, but these are not the primary subjects of this report. The activities are of huge economic importance at every level from local to national. Furthermore, this is a vibrant sector and with a capacity to grow more.

There are implications for policy in both sports and in countryside recreation. It is important to make the most of the impacts by engaging better with local people and local supply chains and to encourage this best practice guidance may help. Education is important to this and barriers such as insurance and liabilities should be diminished, not made worse. Recruiting good professionals into the sector is important and government should be aware that this links directly to long-term rural recovery.

However, there is note of warning too. As the research highlights, the profile and awareness of the sector have not been effective. The reasons are the broad range of different organisations and interests that make up this industry and the difficulty in accounting for and assessing them. This report makes recommendations to help resolve these issues. The lack of overall profile means that decision-makers and policy-makers do not recognise the economic importance of the sector. Therefore, its growth potential is often not supported effectively. For Government, it is important to recognise the need to grow countryside recreation and sports activities, but in a sustainable framework. This is a key area for the CCPR and Sport England to lead in co-ordinating and in lobbying government.

If Government is moving to create rural areas supported by a mixed economy of agro-environmental farming, and tourism, then countryside recreation and sport are keystones. Today’s educated youngsters on a fishing trip, a bird watching expedition, a climbing lesson, or canoeing trip, will be healthier and better people for the
experience. They will also become tomorrow’s paying tourists and will support the rural economy. With a vibrant and positive sector providing increased opportunities for a range of well-paid and fulfilling careers, more young people will see a future for themselves as professionals. Again this is where the CCPR and Sport England have vital roles to work with their membership and to represent the sector to Government.

Underlying Trends

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

These trends raise important possibilities. While there may be fewer children, they are likely to have more money spent on them and on their hobbies. In particular, though the affluent over 50s with time on their hands will be increasingly open to new challenges and different leisure opportunities, the so-called ‘grey pound’ will be increasingly important. The countryside recreation and sport industry may need to re-orientate its visions and services if it is to more effectively target this lucrative market.

Base on The Henley Centre’s analysis, affluent, time-pressured consumers seeking activities that help them improve their wellbeing, and willing to spend money on what Henley describe as ‘quick-fix’ happiness boosters, represent an important opportunity. Tourism trends show clear increases short-breaks that mirror this. Countryside recreation and sport have significant opportunities to engage with the short break market.

Other tourism trends are also relevant and a rising number of Britons take regional holidays (21% of the population holidaying in Great Britain). The British countryside is a major strategic asset for tourism. Regional distinction and character provides differentiation and increased appeal. However, to maximise the strategic benefits collaboration between regions is needed to reduce fragmentation and address issues of poor infrastructure.

The Henley Centre also notes that our notions of ‘risk’ have changed with two changes that run in contradiction. There has been growth in ‘extreme’ sports, but a parallel increase in litigation. There is the idea that when something goes wrong, someone is to blame. This, and the moves towards more complex risk assessments, is squeezing what is possible, particularly in educational settings.

Whilst these complex influences will continue, overall trends are very positive.
The leisure, sports, and tourism economies will continue to grow as will the environmental industry. This trend will generate further potential markets for countryside recreation and sport industry. With increased affluence expenditure has moved from goods to services, and then to experiences, the average British household now spending £3,500 per year on experiences (such as holidays, sports training and lessons, music etc) and £2,210 on material goods. Henley suggest that by 2010 seventy-five percent of household expenditure will be on ‘lifestyle and fun’ in what they describe as the ‘Experience Economy’.

With moves to a better work-life balance, people will invest time and money in leisure activities. This is an ideal social environment for countryside recreation and sport to flourish, but there is competition. In particular, many mainstream leisure and sports facilities offer levels of sophistication and service well beyond that of the wider countryside recreation and sports industry; as Henley noted for the horse industry, “the buildings and facilities of the sector as a whole are in decline. Compared to other leisure venues, these facilities look substandard and out of date in comparison.

Maximising impacts and growing the sector

This research indicates the potential for successful growth with increase in both quality of life and wealth at many levels. However, there are important challenges if growth and development are to continue. It will require vision, support and coordination and it will need to deliver an enhanced profile at all levels, especially in education and training. These have direct economic impacts and are the future of the sector, and for an important part of the rural economy. It also supports Governmental aspirations for rural renaissance. The associated delivery of education, training and environmental activities, (such as adventure activities, outdoor sports, wildlife recreation) will mean:

- more visitors to country parks, nature reserves and activity centres;
- more members of sporting, activity, conservation and heritage groups;
- more countryside leisure visitors;
- more overnight stops at hotels;
- increased sales of outdoor equipment etc;

and

a vibrant rural economy.

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

In addition, participation in countryside recreation and sport activities can help children and other young people acquire important life skills and provide a focus and purpose to life, and decrease alienation and anti-social behaviour. It is especially important to open up opportunities for countryside recreation and sport activities for young people in deprived inner city areas. Not only does this help the young people, but it benefits the rural economy too. Evidence from the Black Environment Network also shows a latent demand for many of these activities amongst black and ethnic
minority groups. Not only will it be beneficial to develop opportunities for countryside recreation and sport activities for minority groups because of the inherent benefits, but also in considering the economic aspects, the so-called ‘black pound’ is a massive potential that is presently overlooked.

Maximising local impacts: local distinctiveness, local supply chain, and local employment

Countryside recreation and sport has significant potential to contribute to local economic regeneration and social cohesion. This is especially true in remote rural regions, but also in and around the urban fringe and urban centres. There are major opportunities to support farm diversification and small businesses in tourism, leisure and associated catering sectors. However, countryside recreation and sport are part of the leisure economy, competing for a share of consumer spending on sport and leisure. Henley conclude that “consumers have more money and a greater desire for experiences that boost their wellbeing, yet are increasingly time pressured and thus are looking for time-efficient ways to enjoy their leisure time.’ The same applies to the wider countryside recreation and sport industry but with even more complications.

The economic benefits of countryside recreation and sports activities can increase dramatically with enhanced stakeholder performance. By promoting local design, local manufacture, local retail of goods and services and by training and employing local people, the benefits to a rural area rise substantially. These benefits can also be achieved in other ways: by consumption of local foods, purchase of other local products, enjoyment of local culture and wildlife experiences, and so on. For example, if the guides or trainers for an outdoor activity are local, or at least live locally, the economic impacts of their salaries make a huge difference to the local economy. If they live in the local town or city, then the impact reduces considerably. However, to generate economic impacts through countryside recreation and sports, there must be opportunities to spend. Without this, the impacts are minimal. To raise levels of economic impacts it is necessary to increase levels of participation, and opportunities to spend by those who do participate. This is a vital message for both organisers and for strategists. The CCPR and Sport England have important roles in taking this message to their networks and members.

The representation and structure of the industry

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

Countryside recreation and sport need to be promoted as a sector of established industries (such as tourism) or as an industry itself, with significant potential to contribute to the British economy. There are potentially lucrative opportunities for operators, trainers, and providers, together with associated benefits for equipment manufacturers, retailers, and providers of hospitality. The open spaces of National Parks, Areas of Outstanding Natural Beauty, Country Parks, heritage sites, country houses and gardens, nature reserves, long distance trails and others smaller
resources offer major opportunities. Many of these are already being taken or developed, but the potential to maximise the benefits is yet to be fully addressed.

Achieving the potential of countryside recreation and sport

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

To realise this full potential, the countryside recreation and sport industry strategy would seek to achieve five objectives:

i) Identify key opportunities to increase engagement (participation and consumption) in the industry by the general public and so increase revenue streams;

ii) Maximise the above through new recruitment, but also by increasing the activity by those currently involved;

iii) Identify key, specific, strategic issues (both internal and external to the industry) to free the potential of the industry to maximise positive externalities and minimise negative ones;

iv) Underpin the strategy by guidance on best practice. An early task should be to establish good practice for the collection, collation, and analysis of the key economic and participation data;

v) Identify the means necessary to implement the strategic plan.

It is suggested that a key team of stakeholders be established from across either the narrower sector or ideally the wider industry. This team would scope the potential strategic issues and players across the industry, establish the principles of co-operation and likely barriers, and establish the process and resources for developing an agreed strategy and the ten-year plan. A diagrammatic representation of the core components of this ten-year plan is set out below as a Strategic Conceptual Framework for countryside recreation and sports.
SUMMARY OF CONCLUSIONS

- *Countryside recreation and sport now account for a significant amount of consumer expenditure, GDP, and employment;*

- *Major countryside recreation and sport events can generate significant impacts on local economies;*

- *Countryside recreation and sport can help drive and support rural economic regeneration;*

- *Countryside sport and recreation organisations and informal participation make big contributions to rural economies. They also foster social capital through direct impacts of activities and the indirect effects of employment and related services.*

- *Active participation in countryside sport and recreation is a significant area of formal volunteering, and this has social and economic value.*

- *Much economic impact is through the sales of associated goods - equipment and clothing; the ‘opportunity to spend’ is critical in securing economic benefits;*

- *Countryside recreation and sport goods sector is dependent on four factors: research and development; technology; product design; and innovation; and many key players in this sector are UK based;*

- *Retail outlets themselves become part of the inherent attraction of a location to countryside recreation and sports visitors and participants;*

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

MAIN RECOMMENDATIONS

1. *The establishment of a working group facilitated by CCPR and Sport England with the governing bodies of their members. This will consider methodologies and the gathering of data via Standard Information Returns.*

   This is the vital first step to take the recommendations forward.

2. *To build capacity within the sector and the constituent bodies to achieve this.*
Cooperation and mutual sharing of resources will be important in building the capacity to take the recommendations forward.

3. **To lobby for Strategic and Policy recognition at appropriate levels, of the importance of this industry and the need to support it.**

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

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

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

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

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

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

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

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

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

8. **The development of Best Practice Guidance on economic assessment and monitoring for countryside recreation and sports organisations.**

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

9. **The production of Best Practice Guidelines for organisations and operators in order to help them to maximise their sustainability and local economic impacts.**
There are ways to maximise the economic impacts of countryside recreation and sports, simply by moving towards better practice. It is suggested that best practice guidance be produced specifically for stakeholders and players in this sector, and that the necessary training and advocacy is developed in parallel. This should be delivered in partnership with other interested organisations.

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

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

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

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

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

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

- **Advocacy statement and publicity**

  There should be a promotional leaflet to highlight key issues, facts, and challenges emerging from this review.

- **Establishment of a Strategy Working Group of key stakeholders from the wider industry**

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

- **Workshop and conference on the economic impacts of countryside recreation and sports**

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

- **Primary research on the economic impacts of countryside recreation and sports**

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

THE VISION IN A DECADE

- **An identifiable, recognised and quantifiable economic sector;**

- **An increase in total economic activity to around twice that at present, and sustainable;**

- **Countryside recreation and sports open to, and engaging a wider sector of the community - from all ages, and social or ethnic backgrounds;**

- **Countryside recreation and sports supporting rural regeneration and associated social benefits.**