



## The Benefits of Outdoor Recreation

### Introduction

Outdoor Recreation NI has set out its [Strategic Plan for outdoor recreation in Northern Ireland 2015 - 2020](#). The Strategy provides focus setting out the strategic priorities to which Outdoor Recreation NI will direct its efforts and resources to achieve its vision and mission.

**Vision – ‘Placing outdoor recreation at the heart of society’**

**Mission – ‘To create a vibrant outdoor recreation culture, through collaborative initiatives, that inspire action’**

One of the priorities outlined in the Strategy is **‘Championing the Outdoors’**.

Outdoor Recreation NI will proactively engage with the Northern Ireland Executive, MLAs, Departmental Committees, Local Authorities, Strategic Partners and other relevant influential stakeholders to achieve recognition of the significant role that outdoor recreation plays in contributing to health and well-being, social inclusion, community cohesion, volunteering, environmental protection and access, rural regeneration and economic development and the benefits it brings to individuals, communities and Northern Ireland’s society as a whole.

In order to effectively deliver this priority it is paramount that the benefits of outdoor recreation to Northern Ireland are clearly outlined.

Unfortunately, limited research exists specifically related to Northern Ireland and consequently this document combines what research is available from Northern Ireland with that undertaken across the United Kingdom and Ireland in order to highlight the key asset which outdoor recreation is to Northern Ireland

## Further Explanation and Evidence

The ‘Why Outdoor Recreation?’ infographic within [Making Northern Ireland’s Outdoors Great - A Strategic Plan for outdoor recreation in Northern Ireland 2015 -2020](#) provides a useful overview of the benefits of outdoor recreation to Northern Ireland. This section outlines the evidence behind these key statistics.

### Northern Ireland



**Outdoor recreation in Northern Ireland generates £102 million Gross Added Value**

- This information was taken from [‘Assessing the economic impact of outdoor recreation in Northern Ireland’ Sport NI, 2014.](#)
- For the purposes of the report, outdoor recreation was defined as:
  - *“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.”*
- **Gross value added (GVA)** is the measure of the value of goods and services produced in an area, industry or sector of an economy
- £102 million Gross Added Value is broken down in Table 1.

Table 1: Outdoor Recreation GVA, Northern Ireland

	£m	Index
<b>Commercial Outdoor Recreation Sector</b>		
Wages	14.5	
Surplus	12.0	
<b>Total</b>	<b>26.5</b>	<b>26.1%</b>
<b>Voluntary Sector</b>		
Wages	17.7	
Surplus	4.1	
<b>Total</b>	<b>21.8</b>	<b>21.4%</b>
<b>Commercial Non-Outdoor Recreation</b>		
Wages	23.9	
Surplus	16.3	
<b>Total</b>	<b>40.2</b>	<b>39.6%</b>
<b>Central Government</b>		
<b>Wages</b>	<b>3.6</b>	<b>3.5%</b>
<b>Local Government</b>		
<b>Wages</b>	<b>9.5</b>	<b>9.4%</b>
<b>TOTAL VALUE ADDED</b>	<b>101.6</b>	<b>100%</b>
<b>% of Sports Economy</b>	<b>22%</b>	

The report provides the following findings:

*The generated GVA approaches £102m is equivalent to approximately 20% of the sports economy (excluding gambling). The largest part comes from the commercial non-outdoor recreation sector (40% of GVA), verifying the original assumption, as expressed in the analysis of the voluntary sector, that the strong construction element would result in a wider impact within the economy. It should be underlined that this is the tangible income within the financial year; more multiplier related effect may be generated as a result of construction and exports. Following this, the commercial outdoor recreation and the voluntary sectors generate 26% and 21% of GVA respectively. The commercial outdoor recreation is driven primarily by cycling and angling. In terms of accommodation only the 'outdoor specific' accommodation is taken into account (such as camping or dedicated activity accommodation). The voluntary sector has been largely derived by responses to the distributed questionnaire and the history of the Survey of Sport Clubs. It reflects the commercial realisation of work done, but excludes the amount of contribution through unpaid hours (which do not contribute towards GVA). An alternative augmented estimation of the importance of the voluntary sector based on work done (rather than work paid) would bring its contribution to near £31m, an increase of 48%. It is this added value (which is invisible to economic statistics) that has formed the backbone of the outdoor recreation industry and has provided the background for growth in the case of export orientated companies such as CRC. The public sector generates approximately 13% of GVA, mainly in the form of wages.'*

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## **Outdoor recreation generates 3537 Full Time Jobs**

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- Full time jobs are broken down within Table 2

Table 2: Outdoor Recreation Employment, Northern Ireland

Sector	FTE Employed People
<b>Commercial Outdoor Recreation</b>	
Cycling	422
Fishing / Angling	86
Outdoor Equipment	156
Clothing and Footwear	120
Water-sport / Specialised Providers	96
<b>Subtotal</b>	<b>880</b>
<b>Voluntary Outdoor Recreation</b>	
Clubs	62
Outdoor Centres	769
Charities / Associations	30
Parks / Forests	166
<b>Subtotal</b>	<b>1027</b>
<b>Commercial Non-Outdoor Recreation</b>	
Central Government	157
Local Government	433
<b>TOTAL</b>	<b>3537</b>

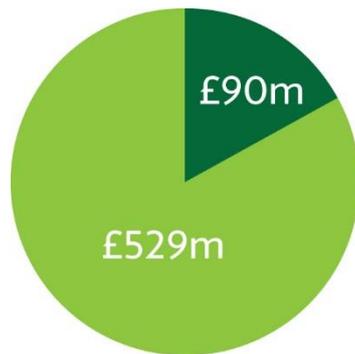
The report provides the following findings:

*‘The main drivers of employment in Northern Ireland are the outdoor centres sector and the cycling sector. The outdoor centres provide the core of accommodation, export 12% of their services and are partly based on the Northern Irish network of volunteers. As highlighted previously, an outdoor centre typically employs four people on full-time basis, four people on part-time basis, and uses the services of eight volunteers. It is fair to say that on the whole this sector exists because it represents activities and a lifestyle dear to the population as a whole, rather than a great opportunity for excessive profit; this is testified by the amount of unpaid work invested into the sector. As most capital is ‘recycled’, the sector generates a high level of employment and, through construction activity, affects the commercial non-outdoor recreation sector. On the other hand cycling employment is driven primarily by exports.*

Central to its importance is a network of small operators and the company CRC which is based in Belfast.

Overall the estimated number of FTE employment of outdoor recreation in Northern Ireland is 3,537. From this, 22% and 12% are generated in the outdoor centres and the cycling sector respectively. Smaller numbers are generated by retailers, fishing/angling, clubs, and other specialised retailers/providers. The non-outdoor recreation commercial sector (providing construction services and equipment) is equally as important as the commercial outdoor recreation section examined, providing more than 1,000 FTE employees (29%). The overall figure can be notionally extended to include the unpaid voluntary time invested within the outdoor recreation sector. This is equivalent to 580 FTE employees, raising the figure of people occupied within the sector (full-time basis) to more than 4,200, an increase of 16%.'

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**Activity Tourism  
Generates 17% of total  
tourism spend**

- This statistic is produced from the combined analysis of two research reports:
  - [‘Activity Tourism – Sharing Success’ Tourism Northern Ireland, 2011](#)
  - [‘Tourism Facts 2009’ Tourism Northern Ireland, 2010](#)

Activity Tourism – Sharing Success states:

*‘Activities tourism figures are not available for NI, but Fáilte Ireland estimated that activity tourists spend 33% more than the average tourist. Based on this, it is estimated that the activities tourism market in NI is worth £55 million in overseas tourist spending. This equates to approximately 16% of overseas tourist spending in NI in 2009. Combined with the RoI and domestic market, **the whole market could be worth as much as £90 to £100 million per annum in revenue for NI tourist businesses.**’*

Tourism Facts 2009 states:

*‘The Northern Ireland tourism industry earned **£529m in 2009**, of which £337m came from staying visitors in NI and £192m from domestic spending.’*

Therefore the potential market size of activity tourism in Northern Ireland (£90m i.e. the lower value identified in Activity Tourism Sharing success) is 17% of total tourism market size (£529m) identified in Tourism Facts 2009.

## United Kingdom and Ireland

A quick look at our neighbours highlights the clear benefits of outdoor recreation across the United Kingdom and Ireland

### ***Economy***



#### ***Wales – outdoor activity tourism contributes £481 million per annum to the economy***

This statistic is taken from [‘The Economic Impact of Outdoor Activity Tourism in Wales’ Visit Wales, March 2014](#). Other economic impact key facts include:

- £481m total contribution to economic activity (all outdoor activity tourism)
  - £236m from domestic overnight visitors
  - £220m from day trippers
  - £24m from international overnight visitors
- £165m total contribution of outdoor activity tourism excluding long walkers
- £304m in value added activity: 10% contribution to the Welsh tourism economy
- 8,243 FTE jobs supported
  - 5,783 from day trippers
  - 2,254 from domestic overnight visitors
  - 206 from international overnight visitors

#### ***Republic of Ireland – overseas visitors engaging in activity tourism are worth €1.2 billion per annum***

This statistic is taken directly for the Adventure Tourism Section of the [Failte Ireland Website](#) – other stats include:

- Overseas visitors engaging in activity tourism in Ireland were worth €1.2 billion in 2011
- Activity tourism visitors stay longer (10 days) than the average overseas holiday maker (7 days)
- The spend of activity tourism visitors is 45% higher than the average overseas visitor

Although the methodology of the €1.2 billion per annum calculation is not available, [a presentation by Caeman Wall, Head of Research and Insights, Failte Ireland at the Failte Ireland Get Out There Adventure Tourism Conference 2013](#) highlighted:

	Overseas Participants (000s)	Spend in Ireland (€mn)
Hiking/Walking	743	649
Cycling	173	200
Angling	107	90
Equestrian	71	76
Water-based*	97	61

Sources: Survey of Overseas Travellers 2011 \* Survey of Overseas Travellers 2012

This would provide a combined total spend in Ireland of €1.08 billion.

### ***Scotland – nature based tourism is worth £1.4 billion per annum***

This statistic is taken from [‘Assessing the economic impacts of nature based tourism in Scotland’ Scottish Natural Heritage, 2010.](#)

The aim of the study was to:

*‘...establish an estimate of the economic contribution of Scotland’s environment to the nation’s tourism economy. The report is based on existing studies and uses raw material from some of the studies to calculate standardised impact assessments. No new primary data collection was undertaken.’*

The report defines nature tourism as:

*‘...nature-based tourism in Scotland is regarded as overnight stay visits (including trips by people living in Scotland) that are related wholly or partly to those features that come under the scope of Scottish Natural Heritage (SNH), which is described below. In broad terms, SNH regards the following elements as the foundation of Scotland’s unique natural heritage: geology and geomorphology; soils; land cover; biogeography; and landscape. Scotland’s land forms and climate support a diversity of plant and animal communities. Specialist visitors to Scotland might be interested in specific aspects of the above (e.g. particular geological sites), but landscapes (including seascapes), wildlife, and opportunities to walk, cycle and otherwise explore Scotland’s countryside and coast are at the heart of Scotland’s nature-based tourism. Parks and open green spaces in towns are also regarded as part of Scotland’s natural heritage, and these can also attract tourist visitors.’*

The report estimates:

*‘...that total visitor spending attributable to nature-based tourism per year (rounded and after displacement is deducted) is £1.4 billion with 39,000 associated FTE jobs. These are indicative rather than specific figures.’*

**England – 42.4 million adults visit the natural environment generating a total visitor spend of £21 billion per annum**

This statistic is taken from [‘The Economic Impact of Outdoor Recreation in the UK: The Evidence’ Sport and Recreation Alliance, 2014](#). This report draws on information from the Monitor of Engagement with the Natural Environment (MENE) which collects information about visits to the natural environment. MENE is commissioned and funded by Natural England with support from Defra and the Forestry Commission. The survey obtains data on visits ranging in duration from just a few minutes upwards. It does not cover ‘holidays’ but does include visits or excursions taken from a holiday base. The main focus of MENE is on time spent in the natural environment for leisure purposes.

An excerpt of findings relating to the impact of this participation are summarised as follows:

- the English adult population participated in an estimated 2.85 billion visits to the natural environment between March 2012-February 2013
- those visits were taken by 42.4 million adults resident in England
- the average number of visits per adult within the year 2012/13 was 67
- walking remained the popular activity, undertaken on 76% of all visits, or approximately 2.2 billion visits overall. Half of all visits were taken with a dog while walking without a dog features in around 769 million visits
- almost the same proportion of females as males will engage recreationally informally in outdoor recreation. This is not the case for traditional sport where more males engage
- the mean duration of a visit was two hours seven minutes
- total spend was estimated to be £21 billion
- spend was incurred in just over a quarter (27%) of visits
- the average spend per trip which included some form of spending was £27
  - just over half (54%) of spending was attributed to food and drink, 14% was spent on petrol and diesel, 9% on admission fees, 6% on gifts/souvenirs, 4% on hire/purchase of equipment, and 13% on ‘other’ goods
- when all visits are considered, including those where there was no expenditure, the average spend per person per visit during 2012/13 was £7.40.

## Health & Well-Being



**Scotland – For every £1 invested in Health Walks, £8 of benefits are generated for society**

This statistic is taken from [‘Making an impact, Glasgow Health Walks Social Return on Investment Analysis, Summary Report’](#) Paths for All, July 2013.

[Paths for All](#) is a Scottish charity founded in 1996 with the aim to:

‘...significantly increase the number of people who choose to walk in Scotland - whether that's leisure walking or active-choice walking to work, school or shops. We want to create a happier, healthier Scotland, where increased physical activity improves quality of life and wellbeing for all. We work to develop more opportunities and better environments not just for walking, but also for cycling and other activities, to help make Scotland a more active, more prosperous, greener country.’

The report states:

*‘The headline cost to benefit ratio is striking. For every £1 invested in Health Walks, £8 of benefits were generated for society. During the year April 2011 to March 2012, £48,705.15 was invested in Glasgow Health Walks by stakeholders, this included staff, volunteers, time, expenses and training. The outputs recorded relate to 21 Health Walk projects with each delivering an average of 35 walks during the year. The value of the associated outcomes was £384,630.27.*

*The findings are clear, Health Walks deliver social benefits including making people fitter, healthier and improving their mental health. This in turn makes cost savings to the NHS and Glasgow City Council, such as reduced spend on care and prescriptions due to clients being more fit, healthy and able.’*

Paths for All have also commissioned further Social Return on Investment (SROI) studies

*‘Studies have been carried out in Stirling and the Scottish Borders, showing social return on investment ratios of £1:£9 and £1:£8 respectively. With the all three independent SROI studies obtaining a similar cost/benefit ratio, and corroborating the nature of the outcomes, we are confident that the social return gained from investment in Health Walk programmes is valid for different types of project across rural and urban settings.’*

## **Republic of Ireland**

- ***Physical inactivity is estimated to cost the state €150 - €300 per person***
- ***10% of the population becoming physically active could deliver savings of €67.5 - €135 million per year***

This statistic is taken from the [Why Sport Matters Infographic published by the Federation of Irish Sport in 2014.](#)

The [Federation of Irish Sport](#) (the “Federation”) was established in 2002 by the National Governing Bodies of Sport (“NGBs”). The reasons behind the foundation of the Federation included the under representation of the sector given the significant number of Irish people involved with sport, the increased investment in Irish Sport, the new projects coming on stream at a very high rate, the need for advice and consultancy, the increased pressure on NGBs and the need for a ‘voice for Irish Sport.’

**“Thirty minutes of moderate exercise a day can reduce your risk of age-related diseases. It can also reduce your risk of cognitive decline.”**

Dr Carol Holland, from Aston University’s Centre for Healthy Ageing, made this statement in support of Dr James Brown from the School of Life and Health Sciences at Aston University following his address to the British Science Festival in 2014. An accurate account of their statements was reported by [The Telegraph](#).

## ***Social Development and Learning***



***"When playing outdoors children are also more likely to meet other children and improve social skills, an opportunity which doesn't arise at home. Being outside in nature puts children in touch with their senses and has a restorative effect, also helping them to cope with stress."***

This statement was made by Liz O'Brien, Deputy Head of Social and Economic Research Group at the Forestry Commission on the launch of Outdoor Play Week 2010 a partnership between the Forestry Commission and Play England to highlight the health benefits of outdoor play and that children today are playing outside far less than ever before.

Liz O'Brien has produced two useful reports highlighting the benefits of outdoor play for children.

['Forest School and its impacts on young children' O'Brien, L and Murray, R. 2007.](#)

['A marvellous opportunity for children to learn - A participatory evaluation of Forest School in England and Wales' O'Brien, L and Murray, R. 2007.](#)

***91% of the UK public believe that parks and public spaces improve people's quality of life***

This statistic was taken from ['Helping community groups to improve public spaces' CABE 2008.](#)

The aim was to find out more about community groups that were involved in improving public spaces, what resources and support they had, what more they needed, and what obstacles prevent projects from progressing.

CABE Space is a specialist unit within the Commission for Architecture and the Built Environment. It aims to bring excellence to the design, management and maintenance of parks, streets and squares in our towns and cities. It provides support and advice to built environment professionals and, through them, best practice guidance for community groups working with professionals to improve their local spaces.

## **Volunteering**



***Social return of investment research shows that £1 invested in environmental volunteering can lead to a return of up to £4***

This statistic is taken from [‘Inspiring People, Improving Places - The positive impact and behavioural change achieved through environmental volunteering with BTCV’ BTCV](#)

The reports states:

*‘An independent assessment concluded that every £1 invested in volunteering with BTCV gave a social return of £4’*