



Everything grows outside - including jobs and the economy

*Valuing the contribution of the outdoor economy in Sheffield:
summary report*

The outdoor economy in Sheffield



“Climbing capital of the UK”

100,000 annual visits to Climbing Works

Over **10,000** Sheffield based climbers

HIGHEST number of climbing businesses than all neighbouring major UK cities



STRONG fell running scene

OLDEST continuously run fell race in the world

MORE runners than national average

14,000 park runners

26 running clubs



NATIONALLY renowned for downhill mountain biking

HIGHER recreational cycling - over 20,000 Strava users

HOME to the country's only city centre mountain biking facility

MORE mountain bikers than national average



Photo: Chris Ratcliff

“The huge variety of different terrains and landscapes, means there’s something for everyone whether it’s trails, grass, parks, hills etc and the fact that these places are within 10 minutes of the city centre in most instances is incredible”

The scope of outdoor recreation

This summary report helps to quantify the size, scale and scope of Sheffield’s ‘Outdoor Economy’, assessing its economic footprint and testing its importance in determining where people work, live and visit. It represents a new way of thinking about Sheffield’s natural geographic assets in terms of their economic importance and the contribution that they make to an enhanced quality of life. The evidence collected will inform future plans to reposition the city’s image to reflect the unique topography and quality of life offer.

Furthermore it will discuss how the benefits associated with the outdoor economy can be captured within the ‘Talent, Trade and Tourism’ framework, which helps to analyse both the economic impact and importance of the sector.



Talent

Attracting people to live and work in the city as a result of the unique mix of city vibrancy and outdoor recreation.

Trade

Sheffield as an outdoor industry destination.
Inward investment in key strategic sites (outdoor recreation hubs).

Tourism

Increased number of overnight stays and secondary spend in the city.
Attracting people to Sheffield for its unique combination of urban life and outdoor recreation.

There is a clear opportunity for Sheffield to better align its key outdoor assets to capture their real economic value and potential. This goes beyond financial indicators such as the Gross Value Added (GVA) and employment generated in the sector, to consider the importance of Sheffield’s natural assets in attracting people to live and work in Sheffield and influencing current residents to remain living here. Furthermore, quantification of Sheffield’s unique offer supports a business case in relation to developing the city’s outdoor economy, both for the benefit of local people and as a visitor attraction to contribute to economic development. There is the potential to reposition the image and profile of Sheffield as the Outdoor Capital of the UK - which may generate tangible benefits in terms of talent, trade and tourism - and exploit the opportunities created by Sheffield’s unique proposition of having both city life and outdoor recreation on its doorstep.

Sheffield has a unique strength based on natural topography, it is the greenest city in England, with an estimated 2 million trees and the only core city to include part of a national park, the Peak District, within its boundaries. Outdoor recreation in Sheffield is characterised by activities which take advantage of the distinct topography including hills and valleys which lend themselves to a range of pursuits, from taking a leisurely walk to high adrenalin sports such as downhill mountain biking and bouldering. Sheffield's topography provides a competitive advantage over and above similar sized competing cities. This competitive advantage in respect of outdoor recreation reflects the attitudes of the people of Sheffield. Participation rates in outdoor recreation activities in the city are higher than the national average and the 'great outdoors' is highly valued by residents.

We define 'outdoor recreation' as: "encompassing all sport and physical recreation that takes place in the natural environment whether on land, water or air"¹. Specific activities have been categorised by the terrain that they utilise: 'land', 'underground', 'air', 'snow' and 'water' - 'wheels' and 'rocks' have also been identified as separate categories to highlight the significance of these activities within the Sheffield area.



Defining 'outdoor recreation':



The National Picture

The Sport and Recreation Alliance recently described 'outdoor recreation' as *"the UK's favourite pastime and an important driver of the visitor economy"* (SRA, 2014²). Nationally 75% of adults in England regularly get active outdoors (at least once per month). Outdoor recreation is also a key driver of the visitor economy: people spending their day enjoying outdoor recreation spent £21 billion in 2012/13 - which increases to £27 billion when overnight visits are factored in. It also contributes to creating jobs and skills: walking tourism alone supports up to 245,500 full-time equivalent jobs. Outdoor recreation can make a significant contribution to tackling the £10 billion cost of physical inactivity helping to create a healthier nation, but its contribution to local economies is often overlooked. This research to assess the scale, scope and size of the outdoor economy at city level within Sheffield is unique in the UK.

The importance of outdoor recreation nationally

Natural England, MENE survey, 2012/13

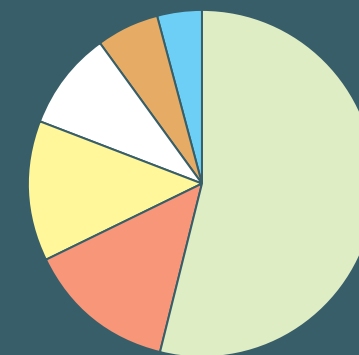
2.85 billion visits to the natural environment

67 annual visits per person

55% of adults 'go outdoors' once a week

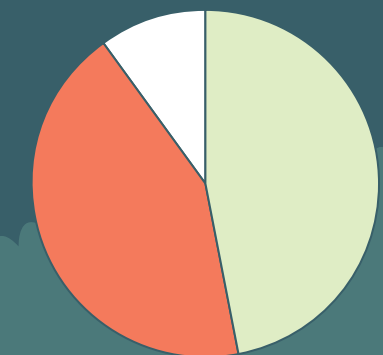
2hrs 7mins average trip duration

£21 billion total visitor spend



54% Food & drink
14% Fuel
13% 'Other goods'
9% Admissions
6% Gifts/souvenirs
4% Equipment purchase or hire

42.4 million people visiting the outdoors



47% to countryside
43% to green spaces in cities/towns
10% to seaside towns/resorts

Active People Survey data (APS7) shows that overall participation in outdoor recreation in Sheffield is higher than the national average - this remains true both for participation in outdoor recreation overall and outdoor recreation excluding walking. Participation in walking - by far the most popular of all outdoor recreation based activities - is also higher in Sheffield than nationally. This, on its own, implies that Sheffield residents are likely to spend more money, than average, on equipment required to participate in outdoor recreation.

Participation rates in Sheffield

Activity	England %	Sheffield %	Difference
Outdoor recreation (inc walking)	59.3	65.9	▲ 6.6
Outdoor recreation (ex walking)	17.8	23.5	▲ 5.7
Running	6.3	10.3	▲ 4.0
Walking	53.3	55.8	▲ 2.5
Recreational cycling	5.0	7.1	▲ 2.1
Freestyle skiing	0.1	1.8	▲ 1.7
Mountain biking	1.7	3.1	▲ 1.4
Game fishing	0.4	1.3	▲ 0.9
Horse riding	0.7	1.2	▲ 0.5
Coarse fishing	1.4	1.8	▲ 0.4
Commuter cycling	6.4	5.8	▼ -0.6
Outdoor swimming	1.9	0.9	▼ -1.0

In summary the evidence suggests higher than average participation rates across many activities in Sheffield, particularly running, recreational cycling, fishing and skiing. Despite substantial growth in participation, commuter cycling in the city remains below the national average.

¹Northern Ireland Tourist Board (NITB). ²Sport and Recreation Alliance, 'Reconomics', 2014.



What's special about Sheffield's outdoor recreation offer?

Four key outdoor activities have been identified as synonymous with Sheffield - climbing, cycling, running and walking. These are all locally significant in terms of participation rates, economic importance and being highly valued by the Sheffield population. The opportunities in each of these four activities can be described as nationally and internationally recognised.

Climbing

Sheffield is described by many as 'the climbing capital of the UK' and the high concentration of climbing-specific and climbing-related businesses, the wealth of climbing opportunities (indoor and outdoor) and the significant number of iconic local climbers support this. The Peak District is considered by many UK climbers as the best spot in England and the British Mountaineering Council (BMC) describe The Peaks as "one of the biggest concentrations of climbers anywhere in the world" with more than 10,000 recorded climbs to be found in guidebooks³. Stanage has the reputation as 'the best crag in Britain'. Sheffield's 'Climbing Works' is one of the three largest bouldering centres in the world with over 100,000 visits a year. It has over 15,000 members who live outside of Sheffield. The facility hosted the British Bouldering Championships in July 2014 and has expanded its business premises by 50% in the last 18 months. It is one of several world class indoor facilities in the city, which is also home to the UK's first dedicated indoor centre, the Foundry.

- Climbing provision in Sheffield is more significant than in other comparable cities. The number of facilities and associated businesses supports the notion that Sheffield is the 'climbing capital of the UK'.
- Sheffield's climbing 'talent' is exceptional. Sheffield is home to many UK champions, internationally recognised climbers, national and international route setters, technical representatives, and award winning authors, film makers and photographers who focus on climbing. Sheffield residents Lucy Creamer and Steve McClure have both been UK champions multiple times and are two of the most accomplished climbers in the country.
- The quality and reputation of the city's climbing infrastructure and opportunities set Sheffield aside as a unique destination for climbing and the tourism potential of this should be investigated.

Cycling

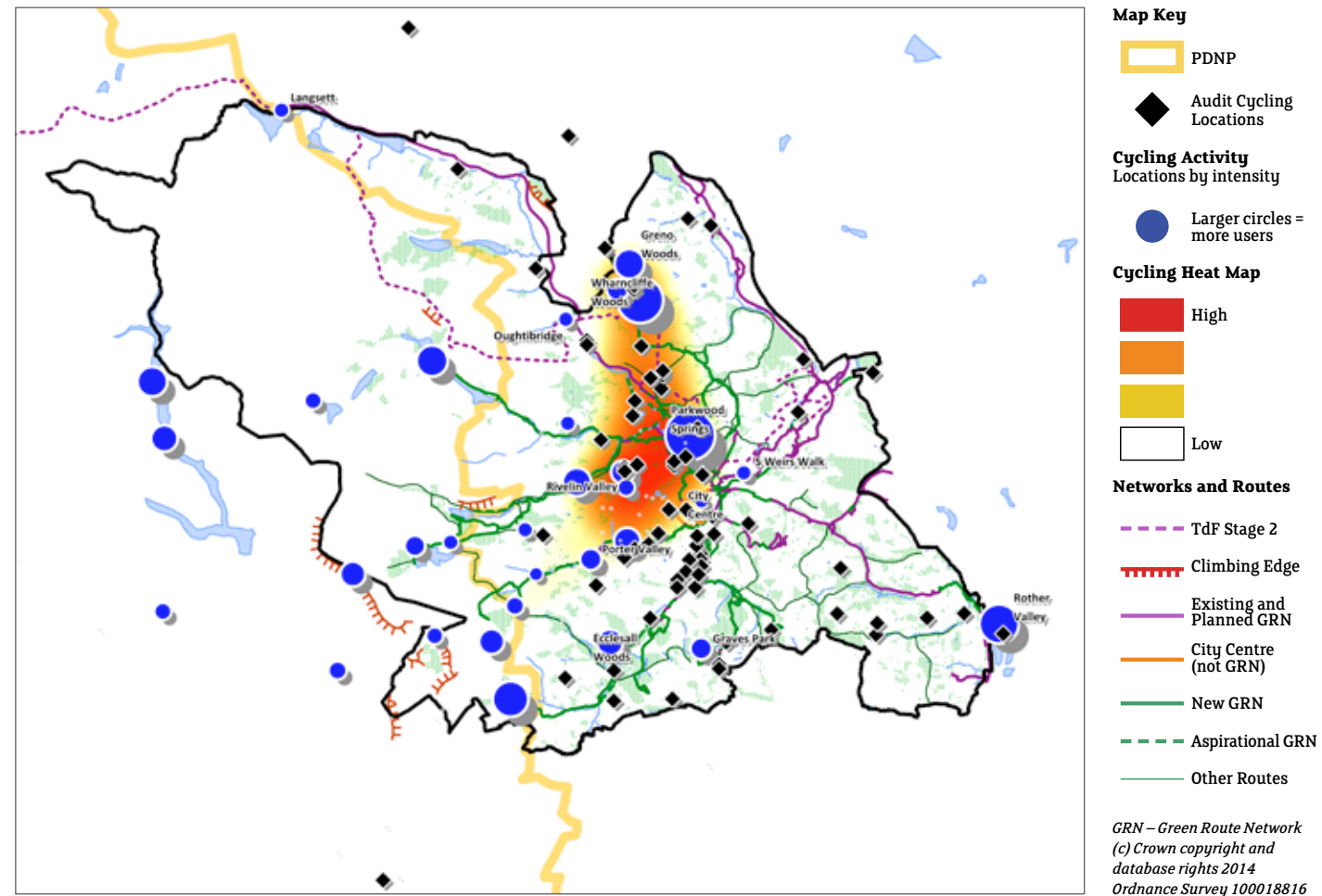
There are an estimated 11.8 million people who own a mountain bike in the UK⁴. Sheffield has a wealth of opportunities for all types of cyclists - from road cycling in and around the Peak District National Park, to mountain biking on the varied terrain that a city which is said to sit on seven hills has to offer. In commercial terms, Sheffield has an abundance of cycling businesses, including manufacturing and retail shops. An audit of the voluntary sector identified 23 cycling clubs (predominantly road cycling clubs). Sheffield has a thriving cycling scene with high participation rates, for example: participation rates for mountain biking in Sheffield are almost double the national average. The recent 'Parkwood Springs' development is the country's only city centre mountain biking facility. Sheffield is also home to UCI Downhill World Champion Steve Peat. Steve is well known as one of the world's most iconic mountain bikers and has helped to enhance the city's reputation for top quality mountain biking.

- Le Tour de France that passed through the city in July 2014 raised the profile of road cycling, potentially creating a lasting legacy for local people and visitors to ride the route of this stage of the tour, and may present opportunities to attract further events and investment.
- Data obtained via popular fitness app 'Strava'⁵ highlights that there are 20,548 registered users who cycle using Strava in Sheffield. The overall number of cyclists in the city is estimated to be at least 2-3 times this figure.
- Sheffield has a thriving mountain biking scene with the potential for further development of facilities and events to benefit both locals and tourists.

³ Source: Realbuzz.com - active healthy living. ⁴ Tourism Intelligence Scotland. ⁵ Strava is a mobile fitness app that tracks performance using global positioning satellites (GPS) allowing users to upload rides recorded via a smartphone app or any GPS bike computer / running watch. It is very popular with cyclists and is also well used by runners. It enables users to track and rank their times, comparing themselves with other users.

'Heat map' to illustrate cycling in Sheffield

The following heat map indicates the key spots for cycling in Sheffield, with Greno Woods, Wharncliffe Woods, Parkwood Springs, Rother Valley, Bradfield, Rivelin, Crosspool and Blacka Moor all clearly identified as key cycling areas with high levels of participation.



“Sheffield has such excellent walking on its doorstep and easy access to the rest of the Peak District National Park.... Sheffield should be considered as the centre, if not the capital, of Outdoor Adventure in the UK because of its geographical position and the outdoor campaigning character of many of its people (past and present)”



Walking

Walking has the highest participation rate of all outdoor activities nationally and in Sheffield. A range of businesses support walking activity from public transport providers to shops, cafés and restaurants. Sheffield hosts a regular calendar of health walks and historically themed walks and is also home to several prestigious and popular walking routes including the 'Round Sheffield Walk' and 'Five Weirs Walk' – plus a host of popular walks in the Peak District. Sheffield has excellent access in a wide range of locations to the Transpennine Trail – which provides safe and scenic mostly traffic-free walking, cycling and horse riding opportunities.

- The proportion of walkers in Sheffield is higher than the national average.
- Membership figures for the five Sheffield walking groups are high, with over 1,200 members of the Sheffield Ramblers.
- Sheffield's green infrastructure, varied topography and popular Peak District routes provide a wealth of opportunities for walking.



Running

Participation in running in Sheffield is much higher than the national average. There is an extensive fell running calendar, and it is estimated that there are several thousand fell runners taking part in local competitive events. Sheffield's biggest running events in terms of participants are the Great Yorkshire Run (almost 10,000 runners), the Sheffield Half Marathon (5,000-6,000 runners), and the Race for Life (4,500 runners). Bespoke survey data (2,091 respondents) confirmed that Sheffield runners are frequent participators (like walkers) with 75% doing so on at least a weekly basis. The total number of registered 'Parkrunners' in Sheffield at the end of May 2014 was almost 14,000. Parkrun⁶ in Sheffield has a higher average number of weekly runners and number of events when compared to Leeds (standardised by 100,000 of population).

- Sheffield has over 25 running clubs with a collective membership of over 5,000 - which is likely to be the 'tip of the iceberg' in terms of the number of active runners.
- Sheffield has a thriving Parkrun scene.
- Sheffield's extensive fell running calendar features fell races on almost every night of the week through the summer (82 events between June and August 2014) and is also home to the country's longest continuously held handicapped fell race – the 'Hallam Chase' – which has been going since 1862.



“The potential for Sheffield as a mountain biking destination is huge. You can see from the Steel City mini DH race the potential for how big Sheffield can be as an international venue for mountain biking”

Steve Peat - World Champion Downhill Mountain Biker

How important is Sheffield's outdoor recreation economy?

Outdoor recreation in Sheffield generates significant economic impact in a range of different ways. In addition to engaging the local population in outdoor recreation generating health benefits and increased expenditure, Sheffield's outdoor recreation sector can create growth in the following ways:

- **Trade**
 - 'outdoor consumer' ('gear' for a fulfilling outdoor experience)
 - 'stay and spend' (supporting accommodation, food and services)
 - 'supply chain effect' (ripple effects that spread to other businesses)
- **Talent attraction**
 - the dual offer of city living and easy access to outdoor activities attracts talent to live and work in the city, which brings longer term benefits
- **Tourism**
 - the unique proposition of city centre culture and outdoor recreation has the potential to drive tourism overnight stays / short breaks
- **Repositioning of City's image and brand**
 - attraction of inward investment
 - promoting tourism

Trade

Sheffield has higher than average participation in outdoor recreation, this generates higher than average expenditure on outdoor 'trips and gear' and also benefits the local population in terms of health and wellbeing. Consumer spending on the outdoors in Sheffield is estimated to be around £93 million. The outdoor-related Gross Value Added (GVA)⁶ in Sheffield is £53.12 million. The GVA of outdoor-related activity per head of population is £96.24. A comparison would be the GVA of outdoor recreation in Northern Ireland which is £101.6 million and per head of population £56.12.

Overall the estimated employment generated by the outdoor economy in Sheffield is 1597 FTE's. There are approximately 2,647 outdoor volunteers in the city, equivalent to 700 FTE's. The estimated economic value of outdoor-related volunteering is an additional £14-18 million GVA equivalent if this work could be paid in the market. Key indicators suggest that consumers have above average spending in some areas. In particular household spending on outdoor equipment in Sheffield per household is 3.2 times the UK level.

"There is no other city in the UK with such good and varied access to the outdoor environment, and to the range of activity hosts and providers that enable this (climbing walls and boulders, purpose built mountain bike trails, rights of way, forest, agricultural and moorland, wild areas)"

£93 million consumer spending on outdoor equipment
£96 per head gross value added (GVA)
£14 - 18 million volunteer economy - equivalent **700 FTEs**

Household spending
on outdoor equipment



⁶ Gross Value Added (GVA) is the difference between the total income to a sector and the cost of inputs. It is calculated as the sum of wages and profits.

Founded in Sheffield over a quarter of a century ago, cycle manufacturer **Planet X** is still run by riders, for riders, offering class-leading products. They design and build well-known brands: Planet X, On-One and Titus, and sell over 10,000 bicycle products worldwide. Planet X is currently the second biggest bike assembler in the UK, and has a turnover of £6.4 million, with 25 FTEs.

Sheffield-based **GO Outdoors** is the UK's largest specialist retailer of camping equipment, tents, outdoor clothing and footwear. The store has been trading since 1969 initially as the 'Camping and Caravanning Centre' ('CCC' to locals) and re-branded in 2004 'GO Outdoors' now has stores in 49 locations. The Sheffield HQ has an estimated turnover of £7.4 million and employs approximately 120 FTEs.

Talent

A bespoke online survey was designed to assess the importance of Sheffield's 'Great Outdoors' to local residents, to measure their engagement with outdoor recreation, to identify activity 'hot spots', to get an indication of consumer expenditure and to collect qualitative data on what's best about Sheffield and why outdoor recreation is important. A good response of 2,091 people was achieved which provides an insight into participation in outdoor recreation and its importance to local people.

The survey data highlighted the power of Sheffield's 'great outdoors' to attract and retain talented people. Overall 58% of 995 respondents who had moved to Sheffield indicated that the 'great outdoors' had influenced their decision to move to Sheffield by either a 'significant' or 'some' extent. Over three quarters of respondents (78%) who were 'born and bred' in Sheffield (691 people), indicated that Sheffield's 'great outdoors' had influenced their decision to remain in the city.

Overall 67% rated the 'great outdoors' as 'extremely important' (1,308 respondents), 24% as 'important' and 7% as 'somewhat important' giving a collective 'importance' score of 98%. Qualitative survey data (645 responses) identified that the best thing about living in Sheffield was it being 'the best of both worlds' - a combination of urban and rural living - with 206 comments specifically referencing The Peak District. The friendly people, community spirit and 'village feel', plus access to sports and activities (particularly walking, climbing and mountain biking) and transport networks were also frequently cited responses.

An enhanced quality of life, benefits to health and wellbeing, walking, climbing and cycling opportunities, socialising and it being 'free' were described as the most important things about Sheffield's 'great outdoors'.

“The parks and woodlands of the city are what make the city great, the parks and outdoor living of the city is why people come to the universities and then stay on in Sheffield, this helps to grow the economy making Sheffield the city it now is”

Tourism

Tourism is a resource industry and some experts in the field believe that natural environmental assets are the very foundation upon which all tourism rests and are usually the most successful in attracting tourists. Sheffield is blessed with a wide range of natural assets which suggests that it may have a competitive advantage in terms of attracting tourists and benefiting from the reported 'halo effect'. Sheffield is ideally placed as a short break destination where visitors can enjoy the 'outdoors by day; city by night' offer.

The events sector in Sheffield could be a key component of developing an enhanced tourism offer. Sheffield City Council's event calendar lists over 300 different community and major outdoor events held annually in the city's parks and green spaces. To complement this there is a need to develop a wider 'package' aimed at encouraging tourists to stay overnight or take a short break in Sheffield. Cliffhanger and Sheffield Adventure Film Festival (ShAFF) are large outdoor recreation focused events with a growing profile. Their presence in the city helps to reinforce the 'outdoors vibe' that many residents describe as being a key part of what makes Sheffield special.

Cliffhanger is the UK's biggest 'outdoor event for outdoor people' and attracts spectators and exhibitors from around the country. The event overall generates significant economic impact for Sheffield and showcases the city's climbing credentials. The event has hosted the British Bouldering Championships for the last three years.

The Sheffield Adventure Film Festival (ShAFF) is now in its ninth year and it continues to grow. The 2013 ShAFF festival saw a 29% increase in ticket sales (with over 3,700 sold) meaning that ticket sales have trebled over the past three years. The event generates 1,554 bed nights within the city worth around £50,000.





Repositioning the city's image and brand and maximising economic potential

Sheffield has a unique strength based on natural topography, which provides a competitive advantage over and above similar sized competing cities. The size of the outdoor economy is large as a broad comparison with other cities but remains relatively small as part of the city's overall economy. The quantitative economic value of the outdoor economy under-represents the true value of the outdoors to the city (because many of the facets cannot be quantified). The outdoor economy has the potential to grow. This includes the development of the city's event portfolio and further facility development to capitalise on growth in individual activities, to enhance tourism opportunities and to serve local need.

Sheffield's unique offer supports a clear business case in relation to developing the city's outdoor economy, both for the benefit of local people and as a visitor attraction to contribute to economic development. Sheffield has higher than average participation in outdoor recreation and the opportunities to engage with Sheffield's 'great outdoors' are highly valued by local people. The evidence suggests a range of key opportunities, both in terms of quick wins and longer term development, which could help Sheffield to create a clear outdoor offer and to re-brand as a key city for outdoor industry, tourism and talent.



Photo: Richard Baybutt

Strengths	Opportunities
<ul style="list-style-type: none"> • Positive economic indicators • Natural topography • Strong sporting communities • GVA and employment generated in the private sector • Strong Peak District brand • Strong advocates and huge enthusiasm for the sector • Above average participation in outdoor recreation • Outdoor recreation sector and assets highly valued by the public • Four key nationally and internationally recognised distinct activities (walking, cycling, running and climbing) • Central location for UK markets • Unique and distinctive mix of city and countryside • Engaging people from a wide range of ages including families and the ageing population 	<ul style="list-style-type: none"> • Development potential of key sites • Short break potential • Wider development of the city's events calendar • Tour de France enthusiasm for cycling to drive participation increases and lever future events / investment • Growth in individual sports and activities leads to increased volunteering and consumer demand • Contribution to a fit and healthy, ageing population • Environmental benefits of increasing green travel • Greater promotion of inter-generational / family activity to enhance wellbeing • Linking in with the 'Move More' Olympic legacy programme and existing network • Opportunity to re-brand Sheffield forging connections between 'steel city' and 'green city' • Economic development linked to outdoors lifestyle will be less sensitive to effects of recession • Development of the Green Routes cycling network across the city
Weaknesses	Threats
<ul style="list-style-type: none"> • Lower than average commuter cycling rates • Cycling infrastructure not comprehensive • Lack of a cohesive offer between Sheffield and the wider Peak District • Low level spend associated with many outdoor activities (e.g. walking) • Limited camping provision • Showcasing success 	<ul style="list-style-type: none"> • Lack of private funding to pump-prime development of key sites (e.g. Parkwood Springs) • Challenge of branding

Acknowledgements

We would like to thank the following people and organisations for providing information and support with this research: UK Climbing, Catherine Faux, Cotic Bikes, CTC Sheffield, Duncan Philpott, Environment Agency (Fisheries), Climbing Works, National Trust, Ride Sheffield, Sheffield City Council, Heason Events, The Foundry, Sheffield Hallam University, Sport & Recreation Alliance, Steve Peat, Strava, University of Sheffield, Natural England, Kylie Rogers, Laurie Brennan, Richard Baybutt, Chris Ratcliff, South Yorkshire Forest Partnership.

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