

Trends in adventure activities 1995 – 2008

ACTIVITY	NO. OF VENUES USED		NO. OF CLUBS		NO. OF PARTICIPANTS (AFFILIATED & NON AFFILIATED)	
	1995	2008	1995	2008	1995	2008
Adventure Racing	N/A	26	N/A	N/A	N/A	1,000+
Caving	N/P	2	21*	2	557*	22
Fell Running	11	21	17	25	207	700+
Field Archery	N/A	14	N/A	27	N/A	300
Mountain Biking	13	81	N/P	8	1,000	15,000
Kite Buggy	N/A	4	N/A	1	N/A	40
Mountain Boarding	N/A	1	N/A	1	N/A	1,125
Orienteering	N/P	88	3	4	300	1,632
Rock Climbing	4	20	N/P	7	N/P	600
Canoeing	N/P	63	22	22	772	2,600
Kite Surfing	N/A	19	N/A	1	N/A	50
Rowing	3	17	35*	14	1,500*	500
Sailing	50	55	37	37	9,900	12,000
Power Boating & Motor Cruising	N/P	27	N/P	N/P	N/P	N/P
Scuba Diving	7	20	30	30	N/P	N/P
Surfing	N/P	16	N/P	5	N/P	7,580
Water Skiing & Wake Boarding	8	24	7	N/P	2,500	N/P
Aeromodelling	20	35	16	22	382	557
Microlight Flying	8	9	4	3	300	377
Paragliding & Hang Gliding	20	23	1	1	61	50
TOTALS	144	565	193	210	17,479	44,133

KEY:

* Figures for 1995 are all Ireland.

N/P Information not provided

N/A New activity with no comparative data for 1995

The number of venues has increased by 421 - 340%

The number of clubs has increased by 17 - 8%

The number of participants has increased by 26,654 - 152%

1995 - 2008 TRENDS IN OUTDOOR RECREATION



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Introduction

In August 2008, Sport NI and the Northern Ireland Tourist Board commissioned the Countryside Access and Activities Network (CAAN) to undertake a research project to assess the trends in 23 outdoor recreation activities during the last 13 years, with a view to informing the preparation of a new Outdoor Recreation Strategy for Northern Ireland. The study commenced in September 2008 and was completed in January 2009 by an independent consultant - Sarah Noble with assistance from CAAN's Research Officer - Eszter Ballo.

The project covered the following activities:

Land: Adventure Racing, Caving, Fell Running, Field Archery, Kite Buggy, Mountain Biking, Mountain Boarding, Orienteering and Rock Climbing

Water: Canoeing, Kite Surfing, Rowing, Sailing, Power Boating and Motor Cruising, Scuba Diving, Surfing, Water Skiing and Wake Boarding

Air: Aeromodelling, Microlight Flying, Paragliding and Hang gliding

The activities of walking, cycling and horse riding were not included in the research as they are going to be considered in a separate piece of research later in 2009. In addition, some of the activities that were considered in the original 1995 research study were omitted because they do not require public access to the natural environment. Angling was initially included within the scope of the project however during the course of the data collection phase it was withdrawn as it was recognised that it merited a more in-depth and detailed report, addressing the specific issues affecting angling within Northern Ireland

Project methodology

The project involved 2 stages:

1. Data collection and collation
2. Plotting of data on a Geographical Information System

(GIS) including the preparation of maps showing the location of all facility venues

Data was collected from a wide range of organizations including:

- National Governing Bodies (NGB's)
- Local Councils
- Outdoor Education Centres including Tollymore Mountain Centre, Northern Ireland's National Outdoor Centre
- Commercial outdoor activity providers
- Statutory authorities including Forest Service, Northern Ireland Water, Northern Ireland Environment Agency (NIEA) and
- Other stakeholders including the National Trust and Private Estates.

Data was collected using a variety of techniques including phone calls, email correspondence and one-to-one meetings. In addition, a range of templates specifying the data required was issued to the relevant representatives for completion. The information required to be detailed within the templates included venues, facilities, events, participation, trends and factors affecting future development.

As with any research project, it is important to note that the veracity of the data provided and the conclusions drawn from the data, was dependent on the accuracy of the information received from the stakeholders. The data collection phase of the project highlighted significant difficulties in obtaining accurate statistical data on participation levels. In general terms, the greater the participation levels within a sport the smaller the amount of accurate data available. In particular, it was extremely difficult to obtain any accurate information regarding participation levels of disabled individuals, ethnic minorities or those from High Social Need areas. In most cases these statistics are not recorded at club or NGB level. On occasion there was a limited response from the representatives of some sports and consequently the data made available for the GIS mapping and drafting of this report is incomplete. No information was submitted for the sports of diving, water skiing and wake boarding.

Key trends in outdoor activities over the past 13 years

1. Most activities under consideration in the study have experienced growth in participation levels. This is particularly true for fell running, cross-country mountain biking, adventure racing, orienteering, canoeing and surfing.
2. In the majority of cases, growth in participation has been greatest amongst those not affiliated to clubs or National Governing Bodies.
3. In all activities, female participation is significantly lower than that of males. Those activities that do have high female participation levels are caving (45%), rowing (40%) and orienteering (33%).
4. In all activities disabled participation is low. The exception to this is sailing where it is estimated that because of the introduction of the Sailability Scheme to Northern Ireland in 2001, there are now over 1100 disabled individuals participating in sailing annually. Several NGBs, including orienteering and aeromodelling, are actively working to encourage increased disabled participation through targeted initiatives and events.
5. In all activities ethnic minority participation is low. Anecdotal evidence suggests a significant number of eastern Europeans participating in rock climbing and increased numbers of ethnic minorities participating in surfing
6. The availability of cheaper equipment has had a positive impact on participation levels in a number of activities including canoeing, surfing and mountain biking whilst the advent of ready-to-fly aircraft has contributed to increased participation in aeromodelling.
7. Where statistics allow comparison, it is apparent that the number of venues used by almost every activity has increased.
8. Where funding has been secured for particular staff roles or initiatives, such as youth development, performance management or disabled participation, these have largely been successful in meeting objectives.
9. The number and frequency of events has increased for several activities eg adventure racing, fell running and field archery, leading to increased participation from visitors outside Northern Ireland. The significance of international events to the local economy is evident eg hosting of the World JetMasters aeromodelling event in 2007 in Enniskillen provided an estimated 7300 tourist bed nights.
10. The development of new innovative facilities, particularly the canoe trail network, the advent of low cost airlines and improved road network from the Republic of Ireland to the Northern Ireland have all contributed to increased numbers of visitors from outside Northern Ireland.
11. A number of activities reported increased numbers of participants travelling to Great Britain, Europe and further afield in order to participate and compete in their chosen activity. This is particularly true of those wishing to participate in mountain biking given that no purpose built mountain bike facilities exist in Northern Ireland for this activity.
12. Northern Irish participants in paragliding, canoeing, aeromodelling, fell running, field archery and rock climbing have all gained significant achievements at British, European or worldwide level.
13. There has been an increase in the number of private estates that encourage use of their land for recreational activities. The incentive is usually commercial and in many cases the established activities are more traditional countryside pursuits (e.g. horse-riding, shooting, etc.), plus some limited team-building activities for corporate groups. However, in recent years a small number of private estates have welcomed more contemporary activities including mountain biking and adventure racing. More than half of the current field archery venues are located on private estates.
14. There has been a significant increase in the number of commercial outdoor activity providers operating in Northern Ireland over the past 10 years. These are primarily concentrated in Co. Down.

Factors affecting outdoor activity development

1. Issues surrounding litigation and public liability are leading to increasing difficulties in securing access for a large number of land-based outdoor activities. Fear of litigation is often used as an excuse to preclude access to land. This is true in the cases of those activities taking place on both public and private land. Another by-product of the litigation issue is the growth of 'clubs' in all but name. Groups of activity enthusiasts choose not to be recognised as a club in order to avoid the financial burden of insurance costs. They are free to organize 'events' without paying public liability insurance.
2. Cavers and kite buggy enthusiasts are finding it increasingly difficult to secure reasonable insurance cover.
3. The financial cost of securing access to both public and private land is a major concern for a significant number of sports within the study. In particular, Forest Service has been identified as charging high fees for granting access and activity permits. Additionally, it is apparent that there are great disparities in both the fees charged and in the application procedures for different organizations or sports planning to use the forests. High charging levels by Forest Service have resulted in some organizations taking their events out of Northern Ireland and moving them across the border
4. Representatives from councils, clubs, NGBs and outdoor centres all cite issues surrounding the fulfillment of child protection legislation as having a negative impact on participation levels of young people within outdoor activities. This is particularly evident at club level where volunteers are reluctant to commit the time and finances necessary to the meet the child protection legislation requirements.
5. Most activities specify lack of funding as a factor impeding their development. Field archery, adventure racing and kite buggying report not having received any funding from Sport NI. New facilities, improvements to existing facilities, assistance with travel expenses to elite training facilities or competitions, subsidy of instructor qualification fees, funding for staff, and financial backing for hosting events are all areas where funding is sought.
6. A considerable number of activities cite a shortage of activity-specific facilities as a significant factor impeding development eg. kite buggying, mountain biking, mountain boarding, indoor rock climbing, rowing, aeromodelling and microlight flying.
7. Several activity representatives expressed disappointment concerning the lack of basic facilities at venues on public land eg toilets, changing facilities and shelters. Frustration also exists where public facilities are provided, but remain closed outside of what is considered by those managing the facility as the 'peak season'
8. A shortage of qualified instructors is cited to be an important factor impeding development within the activities of indoor rock climbing, sailing, microlight flying, paragliding, hang gliding and kite surfing.
9. In Northern Ireland, the highest concentration of outdoor activity centres and commercial outdoor activity providers is around the Mourne Mountain area of County Down. Within the vicinity, all parties consulted reported problems of overcrowding at popular activity venues.

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