CUMBRIA ECONOMIC STRATEGY 2008 - 2028

OUTDOOR SPORT, EDUCATION AND RECREATION

STRATEGY ACTION PLAN NO. 6

Purpose

The purpose of this Strategy Action Plan is to bridge the gap between the strategy as outlined in the Economic Plan and the delivery of the actions which will be outlined in the next Sub-regional Action Plan (due for release in December 2008). Each document accordingly takes a long term view when seeking to provide clarity and strategic prioritisation to an otherwise 'wish-list' of projects and programmes.

It should be noted that these Strategy Action Plans are progressive documents which look up to 20 years ahead; but which nonetheless focus on providing, where possible and evidenced, hard targets and economic impact over the next 10 years. The Strategy Action Plans thus begin to describe a future Cumbria and show, through aspiration, what the spatial impact of the Economic Plan could be across the 4 distinct delivery areas in the county; Barrow, Carlisle, West Coast, South Lakes & Eden.

Whilst these Strategy Action Plans acknowledge existing Cumbrian strategies, they try to reflect the impacts of an aspirational level of future economic growth. Each document is therefore deliberately challenging and ambitious, yet remains non-prescriptive in nature.

The plans attempt to identify the impacts and inter-relation between other closely linked priority industry sectors and assess the cumulative effects on cross-cutting themes highlighting, for example, how the spatial patterns of growth may necessitate the provision of appropriate housing, connectivity, employment land etc., and thereby examining whether current strategies could meet requirements in terms of employment, skills, infrastructure and the like, if we were to grow in accordance with our aspirations.

A significant amount of debate has already taken place to get to this point and we now open up the floor for full public discussion of the themes and actions highlighted by each Strategy Action Plan.

Whilst all comments are welcome, we would appreciate, in particular, comments which will aid in the prioritisation of the key actions. For example: What do you think would or would not work? Where should we be focusing most of our attention? What key actions would achieve the greatest results or which would bring little benefit?

Vision

"With its outstanding natural environment, world-class outdoor infrastructure and a strong productive business base of outdoor and related industries, Cumbria is recognised internationally as a leading location for outdoor sports, education and recreation. This reputation brings consistent high growth in sector GVA to all areas of the county, and enhances the appeal of the area as a place to live, work and invest."

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1. EXECUTIVE SUMMARY

THE VISION – Where we are going

"A world-class outdoor infrastructure and a strong productive business base of related industries. Recognised internationally as a leading location for outdoor sports, education and recreation. This reputation brings consistent high growth in sector GVA to all areas of the county, and enhances the appeal of the area as a place to live, work study and invest."

THE CURRENT SITUATION

Across the County

A nationally-recognised leader in the sector - Around 7000 people are directly employed, with at least that number again in related industries, contributing 3% of the county's overall GVA, compared to just 0.1% at a national level. The county also has a large number of key national organisations across the outdoor education and professional development sectors. In addition, the county has a strong outdoor heritage – Renowned as the birthplace of rock climbing, and with a plethora of internationally famous events such as the Grasmere Fell Race and the 'Bob Graham Round'.

Barrow

The outdoor sector currently has minimal representation, with the with the exception of some sporadic water sports activities, such as the British Jet Ski championships in 2007, and some niche activities such as Kite Surfing (the World championships took place in 2008). The area has potential to significantly expand on these activities, particularly through the Barrow Waterfront proposals.

Copeland and Allerdale

The Lake District National Park area is a well known destination for outdoor enthusiasts, with England's highest mountain and the highest density of outdoor retailers in Europe located in Keswick. Traditional activities include fell walking and lake sports, and has recently seen diversification into more contemporary higher-added-value activities such as Mountain Biking in Grizedale Forest.

Carlisle

Carlisle currently has limited scope within the outdoor sector, whilst the rural areas of the district are currently underutilised but offer significant potential for infrastructure development.

Eden and South Lakeland

Issues inside the National Park broadly mirror those above, with a need to develop higher-added-value outdoor activity amongst the highly congested core areas of the Lakes. Outside the towns, both districts have high-quality natural environments including the Eden Valley, North Pennines and the Howgill Fells that are currently overshadowed as visitor destinations by the Lakes.

THE KEY ACTIONS

1. **Adventure Capital UK** combined AdCap branding and single-point-of-access.
2. **Develop higher-added-value** (e.g. Professional Development, Water sports, eco / environmental tourism) **and 'niche' outdoor activities** e.g. Kite Surfing, Paragliding.
3. **Development of key outdoor facilities** for example Whinlatter Forest, 'The Cumbria Marina experience' (Barrow and the West Coast), the North West Coastal Trail and Sports Villages.

4. **Deliver a programme of high profile, national and international sporting events**, such as the Commonwealth Ultra Distance / Mountain running championships and the Great North Swim – Windermere.
5. **Deliver the 'National Skills Academy – Outdoor'.**
6. **Develop an 'English Centre for the Outdoors'** to rival those in Scotland and Wales.
7. **Deliver the Pathways to employment through sport Programme**, for target sectors.
8. **Increase collaboration between the outdoor industry and public agencies** through the Outdoor Industries Working Group.
9. **Develop a collaborative procurement mechanism** and encourage higher value Business tourism activity.
10. **Develop complementary retail and accommodation facilities** through targeted assistance and support.
11. **Explore opportunities to attract events from the Olympic and Commonwealth** games.

INDICATIVE OUTPUTS

1. Growth in Outdoor Sector Gross Value Added of 4% per annum.
2. Tourism GVA increased by 15% above scheduled Growth targets.
3. Industry workforce qualifications to 90% Level 2, 60% Level 3 and 35% Level 4.
4. Visitor Participation in outdoor activities up to 50%.
5. 6% annual growth in sector employment (target 10,500 FTE).
6. Proportion of sector employees in Full Time Employment up to 55%.
7. Percentage of businesses with >£100,000 turnover per annum (adjusted) increased to 50%.

THE GOALS – What Cumbria will look like in 10-20 years time

Cumbria will be recognised as the 'Adventure Capital' of the UK, attracting high-spending visitors and drawing in young and highly-skilled people to live in the county, and adding to the appeal of Cumbria as a place to live, work and invest. Adventure Capital UK will be supported by a chain of instantly recognisable high-quality outdoor projects, the county will be a haven for national and international sporting events focusing on the outdoors. The retail and accommodation sectors area radically enhanced to underpin these projects.

The Cumbrian education offer in terms of work-ready industry skills will be accepted as world class; delivering work-ready graduates with transferable skills and the highest levels of industry qualifications, with an attendant growth in Level 2 and above qualifications from 71% to 90%.

Growth and consolidation in the Outdoor Sector Business base will bring significant increases in GVA. Visitor spending across the Tourism sector increased by 15% above scheduled growth targets, with visitor participation in outdoor activites up from 40% to 50%; Growth in the capacity of the outdoor business base; % of sector businesses with turnover of >£100,000 pa increased from 38.9% to 50% (threshold adjusted for inflation) ; 6% year-on-year growth in sector employment, from approx 7.000 up to 10,700 FTEs, with an attendant increase in proportional full-time employment from 41% to 55%; Full engagement between Public sector and Outdoor industries; 50% of business base directly engaged (compared to current 22% estimated); Consistent GVA growth year on year, with a target of 4% per annum in Cumbria, compared to Regional forecasts of 1.4%.

This strategy is linked and therefore must be understood in conjunction with: Tourism, Education & Skills, Digital Cultural and Creative Industries, Enterprise & Business, Rural, Connectivity and Sustainability.

2. THE GOALS – What Cumbria will look like in 10 years time?

- Cumbria is recognised on an international level as the 'Adventure Capital' of the UK, with an outdoor offer that outperforms that of other centres in the country, and people of all ages, and from all backgrounds are able to come to the county to develop their own 'Adventure' experience, whatever that may be.
- The county's outdoor business base has the capacity, infrastructure and skilled workforce to respond to changes in the industry and external economic factors, and experiences consistent GVA growth year on year, with a target of 4% per annum
- A significant proportion of the small and micro-businesses in the sector are able to grow, bringing an significant increase in employment in the outdoor sector
- Visitor spend is increased across the county, with particular increases in areas outside the core Lake District area.
- The Cumbrian education offer in terms of work-ready industry skills is the finest in the world with a growth in Level 2 and above qualifications from 71% to 90%
- The quality and appeal of the outdoor offer in Cumbria is a significant factor in people choosing to live, work and invest in Cumbria.
- The retail and accommodation offer in Cumbria is of a quality and diversity sufficient to support, and draw benefit from the outdoor industry.
- The outdoor industry and the public sector work together in full co-ordination.

3. OVERVIEW

3.1 Introduction

Of all the key economic sectors, the Outdoor Sport, Education and Recreation sector is that which is most readily identifiable with Cumbria. In terms of natural assets, the county possesses not only the Lake District, but also the outstanding environments of the North Pennines, miles of coastline, Hadrian's Wall country and the Eden Valley. This is combined with an outdoor heritage that boasts, amongst other things, the 'birthplace of rock climbing' and the world's first, and longest-running fell race. In terms of infrastructure, the University of Cumbria trains more outdoor graduates than anywhere in Europe, and Keswick and Ambleside have some of the highest densities of outdoor retailers in the world. Currently the outdoor sector employs in excess of 5000 people in the county in over 400 businesses, including at least 100 outdoor activity centres. The sector generates around £250 million GVA each year, 3% of the county economy. This is significantly above the 0.1% national average, and does not take into account the numerous tourism industries that rely partially on outdoor enthusiasts. In addition to these direct economic impacts, the sector also contributes to the overall appeal of Cumbria as a place to live, work and invest, not to mention the positive impact of health and well-being from outdoor activity.

Despite these strengths, the sector faces challenges; Productivity is no greater in Cumbria that in areas without such obvious advantages. A large proportion of visitors engage in low value activities such as walking; visitor income is seasonal, and unequal across areas of the county. The business base comprises a disproportionate number of small companies that lack the capacity to access higher-value markets or invest in growth, and whom are susceptible to market changes. Furthermore, Cumbria has lagged behind in developing the co-ordinated 'outdoor offer' that exists in Scotland and Wales, with significant gaps in branding and marketing, accommodation and higher-level skills provision. All these issues will need to be addressed to ensure the ongoing health of the Outdoor economy.

3.2 What constitutes Outdoor Sport, Education and Recreation (OSRE)?

For the purposes of the Cumbria Economic Plan, the OSRE sector has three distinct components, listed below. In the following sections - UK, Regional and Cumbrian Contexts, an attempt is made to provide an analysis of the scale and nature of these industries, noting that because of the specialist nature of the sector, and it's overlapping boundaries with areas such as retail and tourism, it is impossible to make an accurate assessment of the true contribution of the outdoors to the economy.

3.2.1 The 'Traditional 'Outdoor Sector'

The first is the collective activities that have traditionally been labelled as the distinct 'Outdoor sector', including (amongst many others) pursuits such as walking, canoeing, sailing, cycling and climbing. These activities and the industries that deliver them form the core of this sub-strategy, in recognition of the world-class position that Cumbria occupies in the outdoor sector, an obvious result of its natural environment, combined with a long history of participation, arguably rivalled in duration only by the European Alps. In commercial terms, the core 'Outdoor sector' comprises 5 sub-sectors; defined by SkillsActive and adopted by a a national employers consultation group.

a) **Outdoor Education** - Includes physical, environmental and social education providing courses key skills and outdoor pursuits skills, personal education, field studies.
b) **Outdoor Recreation** – Includes activity and adventure experiences, both organised and self-guided.
c) **Development Training** - Development training includes leadership and team development, management skills, organisation and community development, life skills and preparation for employment.
d) **Exploration and Expeditions** - Includes national, international and local expeditions and research.
e) **Outdoor Sports Development** - Activities leading to adventure and competition sport and coaching, and generally to specific or transferable qualifications.

It should be noted that these definitions can be interpreted with a significant degree of overlap, and that a significant proportion of Sector businesses deliver several, or even all of these activities.

3.2.2 'Other' Activities

Whilst the county has an exceptional position in terms of the traditional outdoor sector, there are a huge range of other activities associated with sport and the outdoors that are taking place within Cumbria to varying degrees already, or that present completely new opportunities for economic growth. Broadly speaking, these can be classified as follows:

a) **Popular sports** – those sports with mass-market appeal, that do not necessarily connect directly with the 'outdoors' in the generally understood way. Pertinent Cumbrian examples could include the strong Rugby League heritage in West Cumbria, and the Solway 'Golf Coast'. Whilst there are significant opportunities for growth in these activities, they must always (for the purposes of this strategy) be viewed in an economic context. An example of this is the provision of mainstream sports facilities – Whilst offering some economic benefits, for example in direct employment terms, these rarely provide regeneration 'value-for-money'. This strategy does not therefore propose large-scale investment in such facilities, except in exceptional cases.

b) '**Other' outdoor activities –** Those activities that fall outside the traditional 'outdoor' image but nonetheless have a strong connection with the natural environment. These can be both long-standing pursuits such as Fishing, Equestrian sports, some Field sports, or more contemporary activities such as off-road motor sports and motorised water sports. In many cases, the potential economic impacts of growth in these areas needs careful examination, when placed against the potential environmental impacts they cause, particularly in sensitive areas such as the Lakes District, the North Pennines or around Hadrian's wall.

c) **'Niche' outdoor activities** – Sports which are currently not widely practised but that show potential for growth in the future, for example Kite Surfing, Land-Yachting or Mountain-Boarding. In some cases, such as Paragliding, recent growth in popularity leads to a blurred distinction between this category and those under 2.2.1 above. Surfing has already crossed this line to become a 'mainstream' outdoor activity. In many cases these activities may provide an opportunity for Cumbria to become an early leading destination for that discipline.

3.2.3 Related industries

In addition to those businesses directly involved in the outdoor sector, there are a plethora of other industries that derive income from OSRE activities. The strength of the relationship varies, with some related industries, for example retailers dealing wholly in outdoor goods being completely reliant, whilst others, for example accommodation providers with facilities to cater for enthusiasts, may only derive a small portion of their income from the sector.

Some examples of related industries include outdoor equipment hire; outdoor equipment retail; accommodation providers with specialist facilities such as cycle storage or drying rooms; specialist event management companies; and larger organisations such as the Youth Hostels Association and the Forestry Commission who derive significant income from the sector.

It should be noted that the relationship between 'pure' outdoor businesses and related industries is mutually beneficial. Many outdoor businesses would suffer if the supporting industries were absent, and without the infrastructure that these industries deliver, there would be an undoubted drop in overall outdoor activity rates in the county.

3.3 UK Context

While there are statistics on the importance of sport to the UK economy, outdoor sport, education and recreation, as defined for the purposes of this strategy, is not a recognised sector for national statistical purposes, and as described above, is very difficult to quantify in terms of the business base, employment and value generated. Currently, the nearest assessment of the sector nationally indicates that In 2004, GVA output stood at £430m, contributing to 5.1% of the total Active Leisure and Learning output, and 0.1% of the whole UK output.

In 2004, there were 25,021 people employed in the outdoor sector, as detailed in Table 1, representing 0.1% of the total UK employment figures. This should be taken as conservative estimates however, as other studies have indicated the true value of the industry at double these figures. Neither estimates take into account employment within the outdoor education sector, which in itself could account for a further 50,000 direct jobs (SPIRITO, 2000) . This represents only a small component of the wider 'Active learning and leisure' sector, as Table 1 shows.

Table 1: Employment in the Outdoor Sector in the UK, 2004

	Total	Share of Total Active Leisure and Learning (%)	Share of Whole Economy (%)
The Outdoors	**25,090**	**4.3**	**0.1**
Active Leisure and Learning	**575,990**	**-**	**1.9**
Whole Economy	**30,134,250**	**-**	
Source: Skills Needs Assessment: The Outdoors, SkillsActive, 2007			

However, these purely economic statistics do not however present the true picture of the value of the Outdoor economy. In 2003, the UK Tourism Survey (UKTS) concluded that 50% of the population participate in some form of active recreation on holiday, that spending from outdoor activity holidays was in the region of £2bn in 2003 (up from £1.12 billion in 2000) and that activity holidays account for 10% of domestic UK holidays per annum. Again these statistics take no account of spending in related industries such as outdoor retail. Furthermore, the sector is set to continue its recent growth trend above the average for the economy until at least 2014 (see Table 2 below).

Table 2: Forecast Growth in GVA in the Outdoor Sector

	1999 to 2004 (%)	2004 to 2009 (%)	2009 to 2014 (%)
Outdoors Sector	**6.6**	**3.8**	**2.7**
Active Leisure and Learning	**5.3**	**3.6**	**2.8**
Whole Economy	**2.7**	**2.8**	**2.6**
Source: Skills Needs Assessment: The Outdoors, SkillsActive, 2007			

Across the UK as a whole, this rising trend has been largely ascribed to the changing attitudes of the population, towards healthier, more active lives, however the growth may also be due in part to the increasing range of outdoor activities that are achieving mainstream 'identity', and the greater investment required to participate in these newer sports. (An example is the year-on-year increases in participation in mountain biking over the past two decades, compared to hill-walking which has remained more or less stable; Mountain biking requires expensive machinery, equipment and clothing purchases, whereas hill walking requires only appropriate boots and clothing).

In response to this continuing growth, many venues across the country have implemented major schemes, and achieved significant economic gains, by becoming focal points for particular activities, or for the outdoors in general. Prominent examples include the Scottish and Welsh National Outdoor Centres at Glenmore Lodge in the Cairgorms and Plas-Y-Brenin in Snowdonia. Newquay in Cornwall has developed as a surfing haven, and other developments such as the 'Seven Staines' mountain biking courses in southern Scotland have transformed the economic benefits of their natural environments by increasing visitor numbers, spend and duration of stay.

3.4 The North West Context

In all there are 484 businesses in the outdoor sector in the North West. Of these, 12% are businesses in adult and other education, 44% are businesses in other sporting activities, and 24% are in other recreational activities. Table 3 shows the number and proportion of businesses in the North West in the outdoor sector and by sub-sector.

Table 3 – Number / Percentage of Outdoor Businesses in the North West

Sector Breakdown	Number of Businesses	% of Businesses
Manufacture of other agricultural and forestry machinery	**0**	**-**
Youth Hostels and mountain refuges	15	3%
Other provision of lodgings not elsewhere	66	14%
Renting of water transport equipment	0	-
Adult and other education not elsewhere classified	56	12%
Operation of sports arenas and stadiums	16	3%
Other sporting activities	214	44%
Other recreational activities not elsewhere	117	24%
Outdoor Sector	484	100%
Source: Location Prospect, 2007, analysed by Tribal Consulting		

Examination of the sector at a sub-regional level (See Figures 1 and 2 below) yields unsurprising results, in that by far the highest concentrations of outdoor sector businesses are located in those areas with the natural 'outdoor' resources such as Cumbria, Cheshire and Lancashire, but there are also significant resources in the urban areas of the region; 32% of all outdoor businesses are located in Lancashire, 27% in Cumbria, 21% in Cheshire, 13% in Merseyside and 7% in Greater Manchester.

Figure 1 - GIS Plan of Outdoor Companies – North Region

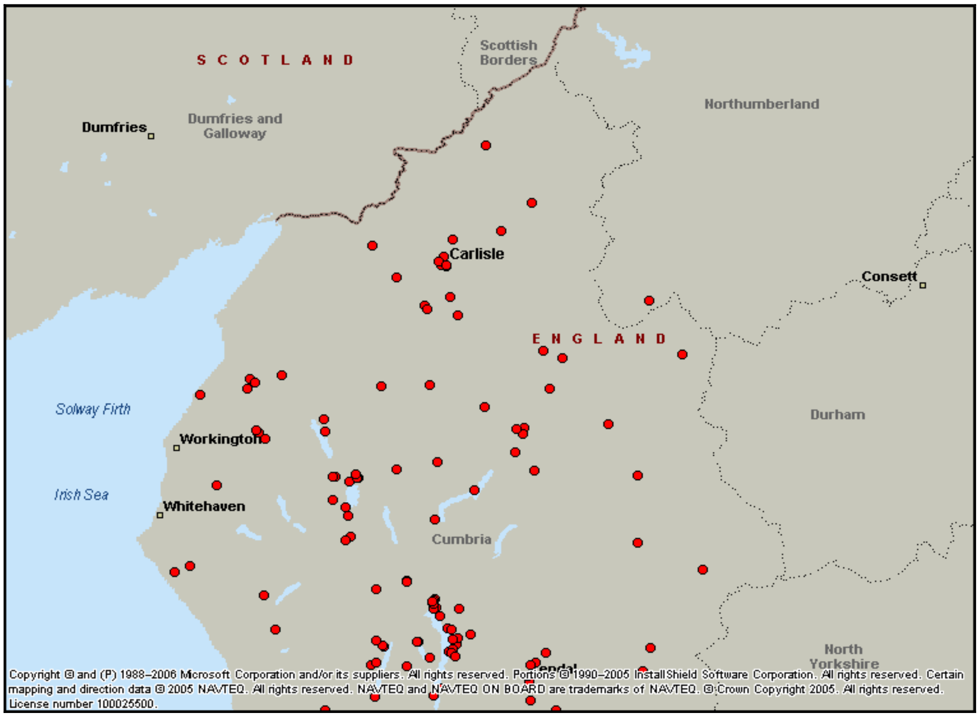
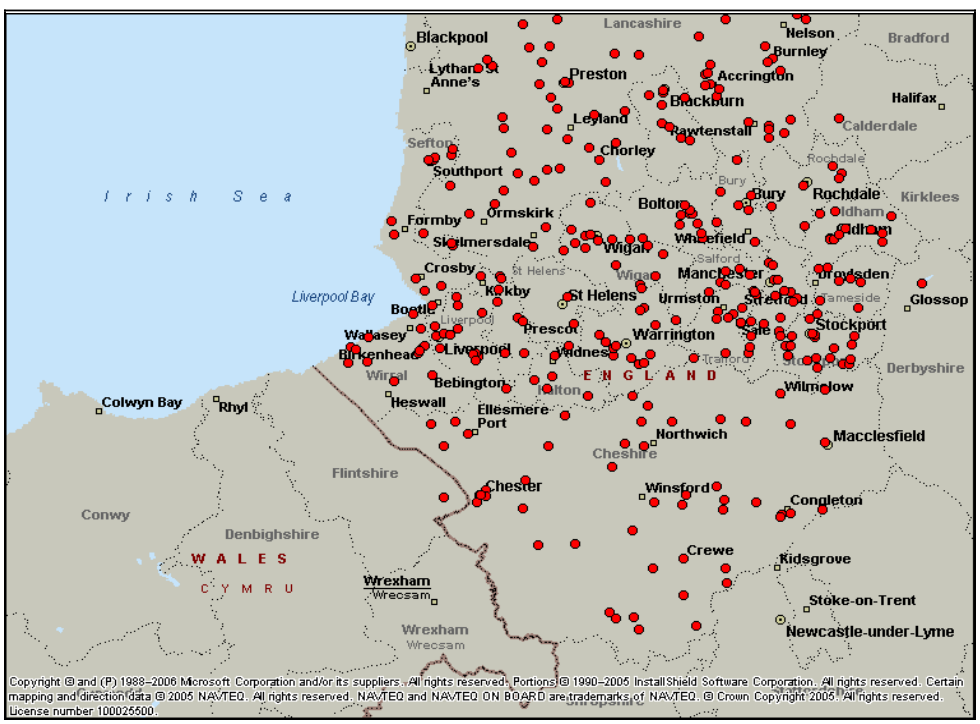


Figure 2 - GIS Plan of Outdoor Companies – South Region



There are also distinct structural differences in the sector between sub-regions:

- In **Cheshire,** the key sub-sectors are adult education and other sporting activities. Cheshire is home to many equestrian businesses, and is well-known among individuals and businesses working within the equestrian industry across the region.
- In **Greater Manchester** the key sub-sectors are in adult education, other sporting activities and recreational activities. Cycling and walking trails are an important component of the outdoor provision in Greater Manchester.
- **Lancashire** has the largest proportion of adult education and education businesses in the region, and this is evident by the range and number of outdoor education centres mainly for school pupils, but also for an increasing number of corporate clients.
- The key sub-sectors in **Merseyside** are in adult education, other sporting activities and recreational activities. Sailing and watersports are an particularly important component of the outdoor sector in Merseyside,
- Adult education, lodgings, recreational and other sporting activities are all prominent sub-sectors in **Cumbria**, illustrating the range of providers and facilities that Cumbria offers, for example, management training, outdoor education for school children, outdoor activities for the general public and accommodation ranging from youth hostels to residential centres.

Over the past 12 years, these businesses have seen sustained growth across the region, and this trend is set to continue, although at a reducing rate over the next eight years (Table 4). Interestingly, output growth is forecast to outstrip employment growth. So, whilst productivity in the sector may continue to rise in the future, its relationship with employment may not be one that is positively correlated. That trend reflects the fact that the industry is forecast to continue to be one characterised by small business with small numbers of employees.

Table 4 - Overall forecast summary; North West Outdoor Sector

North West	1996	2006	2016	Average Annual Growth 1996 – 2006	Average Annual Growth 2006 – 2016
Total Employment	2,098	2,665	2,695	2.4%	0.1%
Employees	1,718	2,276	2,336	2.9%	0.3%
PT	761	1,086	1,210	3.6%	1.1%
FT	957	1,189	1,125	2.2%	-0.6%
Self Employed	381	387	360	0.2%	-0.7%
Output (£)	28,572	44,164	49,862	4.5%	1.2%
Source: Skills Active, Experian Business Strategies Limited © Copyright 2007					

Although the Sport and Recreation sector as a whole (and specifically the Outdoor sector) has historically not featured as a priority sector for promoting economic growth, in recent years this growth trend, and other factors such as the staging of the 2012 Olympic Games in London, and the 2014 Commonwealth Games in Glasgow, have pushed sport up the economic agenda, and the sector is now recognised as a priority sector by the North West Regional Development Agency, as reflected in their emerging Outdoor Sector Development Strategy, due to be published during Summer 2008.

Some notable activities that are already taking place across the region include:

- The proposed construction of two flagship **'Sports Villages'** at Warrington and Leigh near Wigan, with further work underway to extend the Sports Village concept across the region.
- Proposals for the installation of a walking / cycling route along the length of the North-West coast – **The North-West Coastal Trail.**
- Development of several **Regional Parks** (including one at Morcambe Bay and Duddon) as hubs for outdoor activity.
- Support for the Cumbrian **Adventure Capital UK** project.

With these notable successes, it is clear that the motivation and expertise exists within the region to effect economic transformation through major investment in sporting infrastructure.

3.5 The Cumbria Context

At present, Cumbria ranks among the leading outdoor venues in the United Kingdom, with at least 40% of it's 12 million annual visitors engaging in outdoor activities to some extent. However, a large proportion of these participants are 'traditional' visitors, participating in the lower value-added outdoor activities, predominantly fell walking. The large majority of these visitors are attracted to the area for its natural environment, and its historical connections such as Wainwright and the Romantic Poets. This situation has been evident for several decades now, and has led to stagnation of the Outdoor offer within the Lake District National Park. In contrast, however there are large areas of exceptionally high-quality natural environment outside the Lake District that are under-utilised by the Outdoor sector, primarily because of their proximity to the Lake District.

3.5.1 Cumbria's Assets

The county is in an unparalleled position to develop the value of the outdoor sector, thanks to a unique asset base, in terms of businesses, the environment and outdoor heritage. Key assets include:

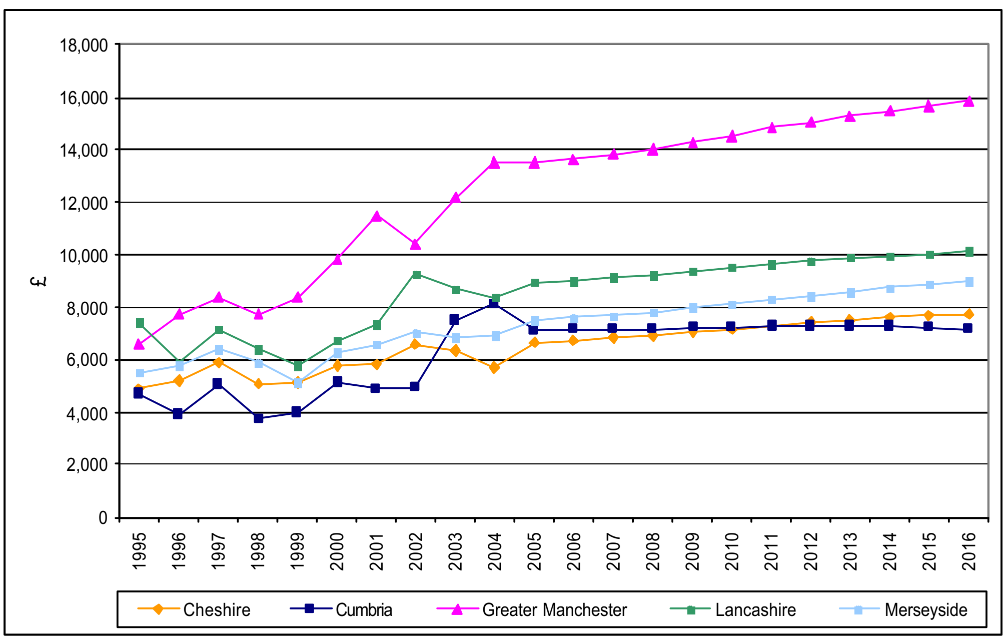
- The **physical environments** within the county – The Lake District, The North Pennines, the beaches and marinas of the West Coast, the Howgill Fells, Morecambe Bay, the Duddon and Solway estuaries, Hadrians Wall, and the Eden Valley.
- Outstanding and unique **outdoor heritage** – Alfred Wainwright, Donald Campbell, the worlds first and longest running Fell Race (Grasmere), the Bob Graham 24 hour fell challenge and the Lake District well known as the 'Home of British Rock Climbing'.
- Over 100 **Outdoor Activity centres** employing around 2,000 people, estimated by Morris and Cockcroft to generate an annual sales value of £100 million. Mintel research estimated the value of activity holidays in Cumbria in the region of £75-100 million in 2004, supporting 2,400 jobs..

- The highest concentration of **outdoor equipment retailers** of anywhere in Europe, mainly based in Keswick and Ambleside, and the highest density of Youth Hostel accommodation in the UK.
- **A strong Business tourism** base (meaning management training, team building etc) valued at £52 million per annum.
- A strong, established **Outdoor Management and Education Training Centre at the University of Cumbria,** training the largest number of outdoor education students in Europe.
- A number of **key national organisations** with a major presence in Cumbria – Brathay Trust, the IMPACT Group, Outward Bound and the Field Studies Council among others.
- In comparison to other areas of the UK with a comparable Outdoor Offer such as North Wales and the Scottish Highlands, Cumbria is relatively **accessible** to population centres, with the M6 and the West Coast mainline .

3.5.2 Cumbria's Challenges

Despite this excellent asset base, Cumbrian outdoor industries are only delivering productivity on a par with less advantaged areas of the country, and growth in the sector is predicted to stagnate in the future (see Figure 3 below) with a possible decline in employment numbers.

Figure 3 Output Forecast (£) 1996 – 2016



Source: Skills Active, Experian Business Strategies Limited © Copyright 2007

In order to ensure continued growth, and to maximise the appeal of the sector in attracting investment and skilled people to the county, the following challenges need to be addressed:

- The **business base** consists of predominantly small business or even one-man-bands, many of which lack the capital and critical mass to undertake higher-added-value activities and ensure sustained growth and additional employment. Furthermore many businesses face an uncertain future as individual's circumstances change.
- The sector is **highly seasonal** in nature and cannot always offer year-round employment, and new entrants to the sector face difficulties in entering or progressing through the sector due to practical qualifications requirements and the high cost of living.
- Transport infrastructure and the natural environment in the Lakes are experiencing steadily **increasing congestion**, with visitors mainly taking part in lower-added value activities, primarily walking. There is a need to better manage outdoor visitation and encourage diversification into higher spending activities.
- The **potential of areas outside the Lake District** is currently underutilised.
- There is a **lack of co-ordinated marketing** of outdoor products and **no recognisable brand** for the Cumbrian outdoors.
- It is difficult for visitors to easily **access** outdoor providers, a lack of **collaborative working** within the sector, and shortfalls in **accommodation and service provision** to support higher visitor spending.
- The constant need to ensure that outdoor recreation, particularly in the case of new infrastructure developments, has minimal impacts on the **sustainability of the local environment.**
- There are notable **gaps in outdoor skills provision**, particularly in the highest-level of practical skills.

3.5.3 Progress so far

Cumbria has not been standing still in respect of these challenges, and a number of key actions have already been delivered or are in the late stages of development. These existing actions, aside from their immediate impacts, also provide an invaluable framework for delivery and evaluation of this Strategy.

a) Adventure Capital UK

Adventure Capital (AdCap) is programme of co-ordinated branding, marketing and capital assistance designed to provide a focal point for development of the Outdoor Sector in Cumbria, and achieve the vision of Cumbria becoming the 'Adventure Capital UK'. Delivered by Cumbria Tourism and funded by the Northwest Development Agency, the first phase of the programme is currently underway. This pilot phase of AdCap involves the following components:

- Developing **collaborative activity** between the outdoor sector and the public sector, including development of the Cumbria Outdoor Industries Working Group (OIWG) and delivery of a bi-annual 'Outdoor Conference'
- Integrating outdoor and accommodation providers into Cumbria Tourism's Destination Management System (DMS) to provide **a 'one stop outdoor shop' for visitors.**
- Delivery of an **integrated branding and marketing** campaign, identifying Cumbria as the Adventure Capital UK at a national and international level.

- Provision of **support to deliver outdoor sports events and capital grants to allow growth of sector businesses.**
- **Enabling everyone who visits the Lakes to have an 'Adventure'**, whatever that means to them.

Ongoing delivery of the Adventure Capital project, on an increasing scale, will be essential for the delivery of the Strategy.

a) The Cumbria Sports Partnership (CSP) and the Sports Economy Partnership (SEP)

In order to ensure co-ordinated working and strengthen strategic development and delivery capacity, both the CSP and SEP will be key partners in the delivery of this strategy, and are already underway developing initiatives such as the Pathways to Employment through Sport project and early stage plans for a high-profile white-water centre. In addition to these two designated partnership, the theme of outdoor sports is already integrated into a number of other strategic documents, notably the Kendal Masterplan and the Barrow Waterfront proposal. This integrated strategic approach will enable development opportunities to be successfully capitalised upon as they arise.

b) Research and analysis of the sector

As noted above, it is notoriously difficult to define and quantify the outdoor sector using commonly available definitions. In response to this problem, in 2007 the North West Regional Development Agency commissioned Tribal Consulting to undertake a mapping study of the Outdoor Sector in the North West, the findings of which are reflected throughout this document. Cumbria Sports Economy Partnership has subsequently commissioned more in-depth work to define the Cumbrian sector in greater detail. The results of this latter study will be published in June 2008. Both these documents will be invaluable in ongoing strategic development and evaluation.

c) Physical developments

On the ground, a number of projects have been successfully implemented which are making progress towards the 'Adventure Capital' goal. These include:

- **Grizedale Forest** Mountain Biking trails.
- The **Whinlatter Forest** Mountain Biking Trails
- **Whitehaven** and **Maryport** and **Harrington** Harbour developments.
- **Howtown Outdoor Centre** redevelopment by the Outward Bound
- The **Penrith 'Cycle Hub'.**

3.5.4 Related Strategic Action Plans.

Within the Cumbria Economic Plan, the following Strategic Action Plans have extensive cross-cutting links with the outdoor sector:

- Action Plan No3: Tourism
- Action Plan No 7: Education and Skills
- Action Plan No10: Rural and Agriculture

4. TECHNICAL REQUIREMENTS

4.1 Businesses

Businesses within the outdoor sector are characteristically small businesses, with comparatively low turnovers and numbers of employees. From an examination of Tables 5 and 6 below, it is clear that this especially true in Cumbria, with a greater number of low employment / turnover businesses than the rest of the sub-region. Even these carefully researched figures may not reveal the true picture, due to the high number of freelance instructors and guides that may not even feature in this research.

The sub-sectors within the outdoor industries experience extremely variable productivity margins, ranging from low (for example retail firms) to extremely high (for example in the Business Tourism / professional development sector), although on a whole productivity is good as a result of the labour– rather than capital – intensive nature of the sector.

Key to enhancing the economic benefits of the sector is the need create employment growth in existing small businesses, alongside encating a transition for businesses into higher-added-value activities within the sector.

Table 5 – Turnover of Businesses, Outdoor Sector by Sub-region

Turnover Bracket	Cheshire		Cumbria		Greater Manchester		Lancashire		Merseyside	
	No	%	No	%	No	%	No	%	No	%
0	11	2%	16	3%	4	1%	27	6%	12	2%
1,001 - 5,000	6	1%	1	0%	2	0%	4	1%	1	0%
5,001 - 10,000	1	0%	3	1%	-	0%	3	1%	1	0%
10,001 - 25,000	12	2%	21	4%	4	1%	23	5%	5	1%
25,001 - 50,000	16	3%	27	6%	3	1%	27	6%	11	2%
50,001 - 100,000	24	5%	20	4%	11	2%	30	6%	12	2%
100,001 - 250,000	30	6%	34	7%	6	1%	23	5%	13	3%
250,001 - 500,000	3	1%	5	1%	1	0%	8	2%	3	1%
500,001 - 1,000,000	-	0%	2	0%	1	0%	1	0%	3	1%
1,000,001 - 10,000,000	1	0%	1	0%	-	0%	4	1%	-	0%
10,000,001 - 50,000,000	-	0%	2	0%	-	0%	5	1%	-	0%
Total	**104**	**21%**	**132**	**27%**	**32**	**7%**	**155**	**32%**	**61**	**13%**

Table 6 – Size of Businesses in the Outdoor Sector by Sub-region

Size	Cheshire		Cumbria		Greater Manchester		Lancashire		Merseyside	
	No	%	No	%	No	%	No	%	No	%
1 – 2	44	9%	62	13%	11	2%	65	13%	20	4%
3 – 5	36	7%	40	8%	14	3%	43	9%	19	4%
6 – 15	21	4%	19	4%	5	1%	27	6%	13	3%
6 – 25	1	0%	2	0%	2	0%	6	1%	1	0%
26 – 50	1	0%	5	1%	-	0%	4	1%	7	1%
51 – 100	-	0%	1	0%	-	0%	2	0%	-	0%
101 – 250	1	0%	1	0%	-	0%	3	1%	-	0%
251 – 500	-	0%	2	0%	-	0%	4	1%	-	0%
501 – 1000	-	0%		0%	-	0%	1	0%	1	0%
Total	**104**	**21%**	**132**	**27%**	**32**	**7%**	**155**	**32%**	**61**	**13%**

4.2 Location

The sector can be broadly split into two categories – *location-specific* companies, for example equipment hire, outdoor education centres, accommodation providers and outdoor retailers by nature need close proximity to their markets, i.e. outdoor locations. It is clear therefore that they can only locate near to the key outdoor locations, primarily the lakes. Key clusters include around Windermere and Keswick.

The non-location specific businesses, including the large base of free-lancers, business tourism or expedition companies that deliver outside Cumbria and can largely choose their own location.

4.3 Premises and Infrastructure

The type of premises which are specifically required by the outdoor sector can be both buildings but also facilities. For example, there is a need that hotel, hostel, camp sites, caravan sites, outdoor education centres etc are kept for visitor use, and not either closed or converted into private homes. Cumbria Vision needs policies to resist the closure of visitor facilities such as hotels, pubs, outdoor centres etc.

Cumbria Vision should also support the creation of new facilities. It has grant aided the rebuilding of the Howtown Outdoor Education Centre for Outward Bound which preserved the site as an OEC welcoming 5,000 young visitors a year and employing 15 staff. It has also aided other refurbishment and modernisation projects.

There is a generally recognised need for more single bed en-suite accommodation in Cumbria especially for younger people. This can be partially met by assisting the upgrading of the Cumbria YHA network which is an important asset in the hospitality sector as it permits single night bookings which are required by those making multi-day point to point trips.

“Premises” can be located throughout Cumbria. There is a need both for location in areas of existing high demand in response to market pressure, and for locations in fringe and less popular areas in order to spread the visitor load, and bring income to remoter areas. It is an advantage of the Outdoor Sector that it can provide rural areas with opportunities for income and jobs.

4.4 Housing

The availability of affordable housing is well known as a key issue in all sectors of the Cumbrian economy, including the outdoor sector which employs young graduates but not usually in high paying jobs, for the reasons described above. As with other sectors, availability of housing is a real deterrent to young working people wishing to move into the area.

4.5 Connectivity (Road, Rail, Sea, Air)

A major advantage of Cumbria as an outdoor activities area is its relative accessibility compared to North Wales and Scotland, via the M6 and the upgraded West Coast main railway line. Access for higher-spending visitors could be much improved by the opening of Carlisle airport with regular flights to London.

At present, 90% of visitors to the extra-urban areas of the county come by car, and outdoor enthusiasts are no exception. A number of specific activities will always be reliant on private transport, primarily those requiring bulky equipment, but there is potential – through the Lake District Sustainable Transport study – to enhance the visitor experience (and spend) in other outdoor activities such as walking.

Aside from this, the recommendations in Strategic Action Plan 11 – Connectivity apply to equally to this sector.

4.6 Employment

The Outdoor Sector is already estimated to employ about 5,000 people in Cumbria before taking into account the many more people whose jobs are supported by visitors engaged in outdoor activities. It is recognised as a growth sector by SkillsActive the industry training body, and is one of the few in which Cumbria has a natural advantage. Outdoor activities are highly labour intensive, particularly in the outdoor education sector, and this is unlikely to change. Such jobs cannot easily be automated. Employment growth has been estimated at 3% per annum in the sector. 3% compound growth would mean a near 50% increase in employment over a 10 year period. This seems a modest target which could be maintained over the long term.

4.7 Skills

The core of OSRE sector (i.e. excluding outdoor retail) is unique in terms of skills requirements when compared to other sectors. An ‘ideal worker will require both a mix of higher-level transferable skills (for example financial and business management or teaching qualifications), combined with highly specific practical qualifications such as Mountain Leadership accreditation. This combination of skills requirements creates problems within the labour market, as entrants to the sector, whilst gaining the higher-level skills through formal academic courses, often do not have the immediate practical skills to qualify them for the higher-paying jobs within the sector. Consequently there tends to be a long progression time through the sector, as newer workers steadily accumulate the variety of qualifications to enable them to progress to higher-paying posts. This is also tempered by a ‘dead-man’s shoes’ factor, with a restricted number of senior posts proportional to the industry as a whole (and long residence-times within these posts) further restricting progression through the industry.

Whilst this situation does not pose an immediate threat to the industry (as there is currently no shortage of available staff within the sector), in the longer term, when taking rising cost of living, and the increasing cost of practical training courses, the sector may become far less appealing as a career choice to younger people; As natural wastage occurs at the older end of the workforce, this may lead to a chronic skills / labour shortage over a 20-year period. Furthermore, this trend diminishes the value of the sector in attracting young people to the county, a key factor in OSRE's inclusion in the Economic Plan.

Key to the development of the outdoor sector is the proposed location of the National Skills Academy for the Outdoors, under development by 'Skillsactive', the sector skills council for sport and the outdoors. Plans for the academy are still being finalised, however it appears likely that the centre will be located at the existing Newton Rigg campus of the University of Cumbria. To maximise the benefits of this establishment, a review is required of the current courses available within the UoC, and other Cumbrian providers, to deliver the best combination of 'soft' skills and the practical outdoor qualifications required to ensure career-ready graduates. A possible longer term goal is the development of an 'English Centre for the Outdoors', to rival the current Scottish and Welsh installations at Fort William and Coed-Y-Brennan; This would enable the delivery of the very highest level of outdoor qualifications that are currently not provided in Cumbria.

5. IMPACT BY LOCATION

5.1 The Lake District National Park Area

As the core area for outdoor activity in Cumbria, specific actions for the Lake District are covered extensively elsewhere in this document. Another point of note is the support that outdoor industries have historically received from the National Park Authority, particularly in relation to planning issues, in recognition of the contribution that the sector makes to the local economy. Ongoing support in this respect is essential to continued growth, and is especially relevant in some of the higher-added-value activities within the sector.

5.2 Carlisle

Carlisle currently has numerous outdoor resources, including the Hadrian's Wall area - part of the Hadrians wall national trail, the northern reaches of the Solway Firth and large tracts of undeveloped moorland and forestry in the border region. These venues offer a range of opportunities for the development of the outdoor sector; combined with the lifestyle opportunities and realistic cost-of-living in Carlisle itself.

5.3 The West Coast and Furness Peninsula (outside of the Lake District National Park area)

The West Coast and Furness Peninsula offer perhaps the greatest opportunities for the proportional growth of the outdoor sector. Current opportunities focus around 5 distinct activities:

- **Watersports** (including Yachting / sailing and the various motorised watersports) – Continued development of the chain of marinas along the coast, and the continued development of Barrow as a choice location for powerboating and jet-skiing. Development of these activities is integral to the numerous regeneration schemes underway along the coastline.

- **Beach and surf-based sports**; primarily kite-surfing and land-yachting, two 'niche' activities where the area has the potential to become a key destination.
- **Walking, cycling and equestrianism** – Building on the opportunity presented by the proposed North-west Coastal Trail and the Morcambe / Duddon Bay Regional Park, promote the coastal areas as a outstandingly peaceful and beautiful area in which to undertake these activities.
- **Golf** – Under the umbrella of the NWDA's Golf Coast Initiative, enhance existing courses (e.g. Silloth and Ulverston), and seek opportunities for new courses, at Derwent Forest and to the south of Whitehaven.
- **'The Rugby Coast'** – At present, around 50% of the players in Rugby League's Super League originate from West Cumbria; explore opportunities for development of this strong heritage, possibly in conjunction with the development of Cumbrian Sports Villages..

Key to successful development in any of these sectors is the improvement of the accommodation, retail and service provision across the West Coast and Furness areas; existing provision is generally inadequate to support the desired image of a high-quality outdoor destination.

5.4 Eden & South Lakeland (outside of the Lake District National Park area)

In most respects, the quality of outdoor opportunities in Eden and South Lakeland is equally high both inside and outside the national park boundaries, with the Eden Valley, the North Pennines and the Howgill fells. In addition, the Newton Rigg Campus at Penrith is the focus for outdoor learning in Cumbria, and both Kendal and Penrith offer opportunities for physical infrastructure developments, unconstrained by the planning restrictions within the National Park. Overall visitor numbers in the sector do not reflect this quality however, partly because of the appeal of the core Lakeland area. Current opportunities include:

- Development of the National Skills Academy – Outdoors at Newton Rigg
- Potential to attract key outdoor sector organisations to relocate in Kendal and Penrith
- Development of Niche sports such as Fishing in the Eden Valley, Mountain Boarding and Paragliding in the North Pennines and outer Lakeland fells.
- Development of facilities in Kendal – Sports Village, White Water centre, expansion of dry skiing.

6. THE STRATEGY

O1 Cumbria – The 'Adventure Capital' UK

Key Objective – Cumbria will become nationally and internationally recognised as Adventure Capital UK with a successful outdoor sector delivering widespread economic benefits to all areas of the county

Key actions -

a) Ongoing delivery of the **Adventure Capital project** through Cumbria Tourism, providing a hub for the promotion of the Cumbrian outdoor industry and the implementation of the 'Adventure Capital' vision.
b) **Promote Cumbria as the Adventure Capital UK** through an intensive and ongoing marketing campaign and the widespread use of the 'AdCap' logo in marketing activities

c) Develop the infrastructure, quality and profile of **higher-added-value activities**, for example Horse Riding, Mountain Biking, and Water sports, **and 'niche' activities** such as paragliding, Kite-surfing or mountain boarding.
d) Build on the existing destination management services provided by Cumbria Tourism to develop a **single point of access for visitors** to engage with outdoor sector providers, accommodation and retail
e) Provide investment for the **development of key outdoor facilities and organisations**
f) Develop and market a network of high-quality **long-distance walking, cycling and horse-riding trails**, linking in to local outdoor, retail and accommodation providers.
g) Attract and successfully deliver a range of **high profile, national and international sporting events** based around Cumbria's unique physical environment.
h) Ensure all developments are **appropriate to the character and environment Cumbria**.

Key indicators

- Tourism Value indicators (STEAM Model).
- £ Equivalent advertising / PR.
- £ Private sector investment in facilities or organisations levered in.

O2 The best outdoor education and skills offer in the worl

Key Objective – Raising the quality and scope of Cumbria's outdoor skills offer to a world-leading position

Key actions -

a) Deliver the **'National Skills Academy – Outdoor'** at the University of Cumbria Newton Rigg Campus.
b) Subsequently, develop an **'National English Centre for the Outdoors'**, offering the highest level of practical outdoor qualifications, to rival Glenmore in Scotland and Plas-Y-Brenin in Wales.
c) Examine and refresh the outdoor skills offer in Cumbria. **Focus on 'work-ready' outdoor skills**, and practical delivery methods – e.g. short-courses, higher level management skills (L4 and above), or practical business skills (IT, Human Resources etc).
d) **Increase employer investment** in the supply of learning opportunities and work-based training, including provision of financial assistance to increase uptake.
e) Maximise the **employment opportunities for workless or disadvantaged** sectors of the population through delivery of basic skills that provide pathways to employment in the sport sector.

Key indicators

- Proportion of workforce in sector with L2, 3, 4 , 5 quals
- £ Private sector investment in training and development
- Number of students coming to county to study L3 and above

O3 Developing the capacity of the Outdoor industry

Key Objective – Enhance the business performance of outdoor sector industries and develop their capacity to respond to market changes.

Key actions -

a) **Research the scale and nature of the sector** in Cumbria in detail, particularly in terms of the number of smaller businesses and freelance operators. (Currently underway)
b) **Increase collaboration between the outdoor industry and planning, regeneration and business support agencies,** to ensure public sector activity responds to industry need and delivers maximum benefits.
c) **Strengthen existing 'informal' collaboration within the outdoor sector business base** to develop the critical mass required to deliver larger-scale ventures and activities.
d) **Attract key outdoor sector organisations** to locate in Cumbria and act as focal points for sector development.
e) **Develop the retail, and accommodation facilities that complement the outdoor sector,** particularly in areas outside the Lake District, to provide a higher quality overall offer, through the development of accreditation schemes and closer involvement with the Outdoor Retailers Association.
f) Develop **outdoor-specific business support services**, reflecting it's role as a growth sector, and increase HE and FE providers' involvement in micro-business support and Knowledge transfer.
g) Examine indigenous models of best practise in **higher-added-value business tourism and professional development**, and develop methods to encourage existing outdoor providers to engage in this market.
h) Develop **local Event Management Capacity**

a) Key indicators

- Number of outdoor sector businesses actively engaged
- £ GVA Growth within Cumbrian sector
- Number of additional employees within sector businesses
- Number of key organisations relocating to Cumbria.

O4 Maximising the offer in areas outside the Lake District

Key Objective – To ensure that the rest of the county shares in the benefits of a strong outdoor recreation sector, particularly through increased visitor spend.

Key actions -

a) Delivery of **major infrastructure projects** at key locations to provide focal points for increased sector activity, including capitalising on the potential of the Derwent Forest site.
b) Development of the outdoor offer of the **North Pennines range**.
c) Development of an **'Irish Sea' Marine offer**, including sailing, motor-boating and 'inshore' watersports, based on the Marina Developments on the West Coast and the Barrow Waterfront proposals.
d) Explore the opportunities for further development of the **NW 'Golf Coast'** offer around the West Coast and Solway Firth.
e) **Develop opportunities in Kendal** – e.g. Cycling Hub, Sandy Bank Canoe Centre, Indoor Ski Centre
f) Identify sites for the establishment of **Sports Villages** in Cumbria.

g) Explore opportunities for **mainstream sports development, where it can deliver economic benefits**, for example the West Cumbria's Rugby League heritage, or Fishing in the Eden Valley.

h) Develop the appeal of **Carlisle and Furness as ideal places for outdoor enthusiasts** to live and work, linking in with the Carlisle Renaissance and Barrow Masterplan regeneration schemes.

- **Key indicators**
- Number of new outdoor sector businesses in areas outside the Lake District
- GVA of outdoor-related tourism businesses outside the lake district
- Number of key projects delivered
- Employment in outdoor sector outside the Lake District
- Number of outdoor-related events delivered outside the Lake District.

7. DELIVERING THE STRATEGY – ACTION PLAN

7.1 The following Action Plan is a comprehensive list of all identified programmes, projects and activities that have the potential to make a positive contribution towards achieving the vision for Outdoor Sport, Recreation and Education in Cumbria, as detailed above. To successfully deliver this Action Plan will require a co-ordinated approach, and commitment and investment from Public, Private and voluntary sectors. The Action Plan does not therefore relate to particular funding bodies or programmes (for example the North-West Development Agency Single Programme, or the European Regional Development Fund) and is not a representation of any future Sub-Regional Action Plan.

7.2. The Red / Amber / Green classification in this Action Plan reflects priorities in terms of timescales for delivery only, in recognition that a number of actions (particularly major, transformational projects) will take substantial time to develop and deliver, whilst others can be delivered within a much shorter timescale. Please also note that the classification are based on timetable for final completion, so actions a mixture of short-term and long-term components will be listed by the targets for long-term completion.

7.3 Within each colour group, projects are listed in order of their reference number which relates to the key actions within Section 6 of this Strategic Action Plan. Neither the colour-coding nor the numerical listing within each colour classification are indications of the importance of actions relative to one another.

7.4 A key role of Cumbria Vision will be to monitor, evaluate and update the Action Plan on an ongoing basis. This process will be undertaken in close consultation with stakeholders from the county and region.

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Delivering the Strategy – Action Plan for Outdoor Sport, Education and Recreation

Timeframe	Ref	Activity	Detail	Allerdale	Carlisle	Copeland	Eden	Furness	South Lakeland
	O1.1	Branding – The Adventure Capital	Co-ordinated with the wider Cumbrian Branding exercise	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.2	Ad Cap Headquarters and designated resource	Ongoing development of newly established HQ at Cumbria Tourism	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.4	Kendal Mountain Film Festival	Continued development of festival	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.5	Single Access point	Enhancement of existing CT offer	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.6	Commonwealth Ultra Distance / Mountain Running champs		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.7	British Orienteering Championships		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*

Immediate	**3 – 5 years**	**5 -10 years**

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	O 1.8	XTerra Events Series		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.9	Lakeland Trails Series	Continuation of 4-race series	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.10	NOVA Great North Swim – Windermere	Annual event	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.11	Cumbrian BikeFest	Repeat of 2007 event	***No Location identified yet***					
	O 1.12	World Kite Surfing Championships		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.13	Helly Hansen Adventure Challenge Series		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.14	Long-Distance Trails	Walking / Cycling / Equine	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*

Immediate	**3 – 5 years**	**5 -10 years**

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O 2.2	Workforce Development – Outdoor Sector	A Workforce development project co-ordinating tightly-targeted bursaries to individuals employed or self-employed in sectors aligned with 'Adventure Capital UK'. Delivery Body - University of Cumbria. Start Date - April 2008	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 2.3	Pathways to Employment	Programme to target workless / disadvantaged, skills training and work experience through sport; Delivered by Sports Economy Partnership	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 2.4	Outdoor Skills Assessment Programme	Investigating future delivery of 'Work ready' skills requirements and high-end practical skills and qualifications	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 3.1	Outdoor sector Research Programme	Delivered by Cumbria Sports Economy Partnership – June 2008	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 3.2	Outdoor Industries Collaborative Group and Public Sector liason group	Industry-wide communication and consultation group, set up through the Adventure Capital Project, with a liason group consisting of Planning, Regeneration and business support agencies	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 3.3	Outdoor Industry Conference	Bi-Annual event, set up through AdCap	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*

Immediate	**3 – 5 years**	**5 -10 years**

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	O 3.4	'Cumbria Outdoor Consortium'	Collaborative group to co-deliver services and facilities?	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 3.5	Cumbria Sports Economy Partnership	Ongoing	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 3.6	Outdoor sector entrepreneurship programme		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 3.8	Outdoor Specific Business Support Products	TBD with Business Link NW	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 4.7	Sand Yachting Development Strategy		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 4.8	Kite Surfing Development Strategy		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 4.9	Equine Development Strategy	Geographically focused	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*

Immediate	**3 – 5 years**	**5 -10 years**

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	O 4.10	'Golf Coast' Development Strategy		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 4.12	Lowther Park	Investigate potential sports developments.	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.4	Sports Events Support Programme	Initial pilot scheme within Adventure Capital programme – To be extended. Possible business / event management component.	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.7	Grant for facilities upgrades or organisational development	Initial pilot scheme within Adventure Capital programme – To be extended	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.15	Grizedale Forest MK2		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 1.16	Whinlatter Forest	Ongoing development	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
	O 2.1	National Skills Academy - Outdoor	Development of facility at Newton Rigg Campus	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*

Immediate	**3 – 5 years**	**5 -10 years**

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O 3.9	Attraction of Key outdoor Sector Organisations to County	TBC	***No Location identified yet***					
O 4.3	'Irish Sea' Marine experience	Development of Brand	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 4.5	North West Coastal Trail	Establish Cumbrian sections of coastal trail.	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 4.11	Morcambe Bay and Duddon Regional Park	Integrated development with Lancashire	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 4.15	Cycling Hubs	Continue development of Penrith; Kendal; Barrow; Workington; Whitehaven; Keswick; Cockermouth.	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 1.15	Thirlmere Canoe Centre		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 1.17	Sandy Bank Canoe Centre		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*

Immediate	**3 – 5 years**	**5 -10 years**

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Delivering the Strategy – Action Plan for Outdoor Sport, Education and Recreation

O 3.7	English National Centre for the Outdoors	Estabish feasibility of centre to rival Wales and Scotland centres	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 4.1	Cumbria Sports Village	Feasibility and site identifications – Lead body NWDA	***No Location identified yet***					
O 4.2	Barrow Waterfront – Marina and Watersports	Implement watersports / marina component of Masterplan	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 4.4	Derwent Forest	Establish uses for site	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 4.6	West Coast Marina Developments	Whitehaven; Maryport; Derwent Howe.	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 4.13	West Coast Rugby	Options appraisal into potential activity.	*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*
O 4.14	Kendal Ski Centre		*Allerdale*	*Carlisle*	*Copeland*	*Eden*	*Furness*	*South Lakeland*

Immediate	**3 – 5 years**	**5 -10 years**