THE ECONOMIC VALUE
OF RECREATIONAL MOTORING ON UNSEALED ROADS

Version 1.0 June 2022

Green Lane Association
www.glass-uk.org

Note to the reader:

While every care has been taken to use the most recent information available to date, this of course will be superseded by any future research on the subject which may come to light before the document is reviewed twelve months from the original date of publication.

The information contained within the document is prepared and intended to be an informed discussion and does not profess to be an exhaustive text.

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First published: May 2022
Author: Lauren Eaton AIPROW
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Recreational motoring on unsealed roads: An economic discussion

Recreational motorised use of unsurfaced roads is not an area of interest that has been studied comprehensively enough to provide much hard economic data. But the Green Lane Association[1] as the largest and longest running user organisation to represent all unsurfaced road users, has collected what external data is available and used responses from the statistically significant number of its members, affiliates, and other user organisations to provide a platform to extrapolate from.

The purpose of this research is to estimate the economic value of the recreational activity of driving or riding green lanes using mechanically propelled vehicles, and to a lesser extent to identify who owns and uses these vehicles in a wider sense.

Percentage of 4x4 vehicles owned by occupation as of 30.03.2020[2]

1. *Farmers – 37.97%*
2. *Tree surgeon – 29.82%*
3. *Property developer – 24.86%*
4. *Company director – 24.10%*
5. *Merchant banker – 23.85%*
6. *Investment manager – 23.83%*
7. *Company secretary – 23.50%*
8. *Property landlord – 23.44%*
9. *Finance director – 22.53%*
10. *Chartered surveyor – 21.85%*

Top 10 postcodes for the percentage of 4x4s as of 30.03.2020[3]

1. *AB52 Insch, Aberdeenshire – 29.01%*
2. *AB33 Alford, Aberdeenshire – 28.53%*
3. *AB55 Keith, Aberdeenshire – 28.15%*

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[1] https://glass-uk.org/

[2] https://www.admiral.com/magazine/news/where-are-4x4s-most-popular-in-the-uk-and-whos-driving-them

[3] https://www.admiral.com/magazine/news/where-are-4x4s-most-popular-in-the-uk-and-whos-driving-them

4. *DL11 Richmond, Yorkshire – 27.95%*
5. *EX21 Beaworthy, Devon – 26.91%*
6. *AB53 Turriff, Aberdeenshire – 207% [sic, unsure of actual percentage]*
7. *AB34 Aboyne, Aberdeenshire – 24.61%*
8. *AB31 Banchory, Aberdeenshire – 24.51%*
9. *DY14 Kidderminster, Worcestershire – 24.35%*
10. *DL13 Bishop Auckland, County Durham – 23.30%*

Who is in the drivers' seat?

While it is not surprising that farmers and people who live in rural communities are the most likely owners and occupants of 4x4s, Admiral goes on to explain that the majority of the list consists of well-paid jobs in the financial sector. While the statistics show this clearly, comparison of this data to previous years identified that the trend of 4x4 ownership by those living in large cities has declined.

> ***Previously, post code areas in south and west London made our top 10 list, but it seems preferences have changed. Our data now shows the top cars in W8, SW7 and SW13 postcode areas (which previously made the top 10) are compact hatchbacks such as the Mini Cooper and Volkswagen Golf.***

Other demographic trends identified by Admiral are that 4x4 owners are more likely to be men and have children.

> ***This suggests there are two types of drivers for whom they're an essential drive: those who need them because the landscape they live in requires it and those who want to drive a 4x4 for its specifications, comfort and prestige. Many families choose a 4x4 for the space and comfort they offer, and they're often seen as a safer form of transport.***
> *Admiral's Head of Service, Alistair Hargreaves (2020).*

Off-Road Vehicle Manufacturing in the UK industry statistics as of 02.12.2021[4]

- Market Size: £15bn
- Number of Businesses: 135
- Industry Employment: 11,019

Other useful statistics

Land Rover Owner International Magazine, the most popular 4x4 magazine in the UK reports an average circulation of 19,874 per issue[5].

The Green Lane Association has 30,000 social media followers.

The Green Lane Association reports a current membership (June 2022) of 6000 individual members of which 70% are 4x4 drivers, and an additional 20,000 affiliate members of which 93% are 4x4 drivers, although not all drive unsealed roads in either case. This number who drive unsurfaced roads is estimated to be closer to 60% of both figures. Overall a figure of 14,500 active green laners who use their 4x4s as their preferred method of travel could be considered to be an educated and reasonable estimated figure.

[4] https://www.ibisworld.com/united-kingdom/market-research-reports/off-road-vehicle-manufacturing-industry/

[5] https://www.abc.org.uk/

Based on observations from within the community, around half of active green laners have chosen to join the Green Lane Association. This would suggest that the total number of active green laners who use 4x4s to drive unsurfaced roads within the UK stands at around 29,000.

The Trail Riders Fellowship[6] estimates that there are around 20,000 active trail riders in the UK[7]. Combined with the GLASS estimate, this amounts to an educated total estimate of 49,000 active UK recreational motorists who use the unsealed road network at least once per year. This would seem reasonable when compared to the statistics in the Faber Maunsell Report of 2007[8], taking into consideration the inevitable increase in users since that time.

Based on a survey of its membership, the Green Lane Association estimates that the average recreational motorised user spends around £5,500 per annum on the hobby. For clarity, we have not included those who also partake in overlanding or significantly lengthy UK based trips, their costs could easily be double this figure. Instead, we have focused on the average green lane motorist, that being a person who takes day, weekend or short duration trips, where part of those trips make use of the unsurfaced road network.

This figure takes into account fuel, maintenance, equipment, vehicle modifications, technology/maps and memberships, and tourism expenditure on food, hotels, and campsites. The average cost of the most popular vehicle models used by our membership stands at £35,000 to purchase new, the average cost of the most commonly used vehicles stands at £10,000.

What is the overall economic benefit?

- Market Size (manufacture alone): £15bn
- Number of Businesses (manufacture alone): 135
- Industry Employment (manufacture alone): 11,019
- Annual spend in ancillary businesses and tourism: £159,500,000
- Annual spend in vehicle purchases based on 20% of users buying new: £203,000,000

Research carried out by the TRF[9] states that there are 6000 miles of green lanes in the UK. If we consider annual spends alone against that length, this equates to £60,417 per mile of green lanes. If we discount the third of the network currently closed under traffic regulation orders, obstructed to users, or of no strategic value to the network, the number drops to 4000 miles and the cost-benefit figure rises to £90,625 per mile for 4x4 users alone. If we are to add the statistics from the TRF in order to include the economic value of trail riders, this figure rises to £116,625 per mile of usable green lanes per annum.

Important notes

Not only do motorised users contribute considerably to the tourist economy, they do so in some of the most rural areas of England and Wales. Green lanes exist outside large settlements and many lanes within well-known destinations such as National Parks have been closed during or since the Natural Environment and Rural Communities Act 2006[10].

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[6] https://www.trf.org.uk/

[7] https://assets.website-files.com/60364ce44148d168e4193d50/61f93eea3e141a9f443f0a69_TRF%20Economic%20Value%20of%20Trail%20Riding%202017.pdf

[8] https://laragb.org/pdf/DEFRA_200709_FaberMaunsellReport2.pdf

[9] https://assets.website-files.com/60364ce44148d168e4193d50/61f93eea3e141a9f443f0a69_TRF%20Economic%20Value%20of%20Trail%20Riding%202017.pdf

[10] https://www.legislation.gov.uk/ukpga/2006/16/contents

One of the main attractions of green laning and trail riding is to explore and experience the most rural and remote areas of the country and therefore, the need to buy provisions, stop to eat or drink, or to make camp for the night, will inevitably happen in these rural areas. Consequently, money spent is put back into regions that have the fewest job opportunities and income compared to more densely populated areas. 11% of the corporate affiliates to the Green Lane Association are owners of such businesses who approached us because our members are significant users of their services. Many others offer discounts to our membership on an unofficial basis for the same reasons.

This calculation does not include cost savings to local authorities made by using considerable voluntary resources made available through user groups, or cost benefits to emergency services through use of services such as the 4x4 Response service[11] or Blood Bikes[12]. More information on these schemes and cost savings can be found in the GLASS Inclusive Countryside Access paper[13] some of which have saved local authorities six figure sums.

Due to the nature of vehicles used for green laning, the higher cost of taxing, insuring, and fuelling these vehicles in comparison to the average car should also be considered.

Furthermore the total number of jobs outside of the manufacturing industry and the market size of 4x4 businesses outside the vehicle manufacturing sector is significant, but no current data is available for consideration. Figures also do not include those who use the unsealed road network on foot, cycle, horse, or carriage. Therefore, the economic benefit of green lane users over all will be substantially higher than calculated above.

[11] https://www.4x4response.info/

[12] https://www.bloodbikes.org.uk/

[13] https://glass-uk.org/files/InclusiveCountrysideAccess.pdf

In summary

Motorised use of green lanes is clearly of considerable economic benefit to England and Wales, particularly to rural areas where income and job opportunities are often less readily available than they are more densely populated areas of the countries.

While it is impossible to calculate the total figure, especially when we consider cost-benefits such as volunteer time given to local authorities, and while no data is available in regard to the non-manufacturing focused businesses in the field, we can reasonably estimate that £116,625 is spent per mile per annum of green lanes per annum just through basic expenses to users alone.

The total figure is likely to be £200,000 per mile per annum or above. More research is needed to calculate the actual value, but even without these figures it is quite clear that the economic benefits are considerable and should be seriously considered when public motorised access rights are under threat.

Further reading

Green Lane Association www.glass-uk.org
Trail Riders Fellowship www.trf.org.uk
Land Access and Recreation Association www.laragb.org
National Motorcyclists Council www.uknmc.org

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