

Getting Active Outdoors:

A study of Demography, Motivation, Participation and Provision in Outdoor Sport and Recreation in England



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Foreword and Overview

Sport England insight produced in partnership with the Outdoor Industries Association.

“Knowing what people want from their sporting experiences is essential if we’re going to make the opportunities absolutely right for them. That’s why I’m really excited about this research and the potential it has to help get more people active in the outdoors more often.”



This report will help us to understand further the outdoors market and the opportunities it presents. It has great potential for the whole sector and I am keen to share it.”

Jennie Price CEO, Sport England

“This is a fundamental piece of research and will drive Sport England’s insight into the outdoor sector, as well as inform and engage with the entire outdoor recreation community, highlighting some of the opportunities for increasing outdoor activity and understanding participants. I would urge any organisation that has an interest in the outdoor sector to engage with its findings.”



Andrew Denton CEO, Outdoor Industries Association

The report was commissioned by Sport England and produced in partnership with the Outdoor Industries Association; we believe it is the broadest research ever taken in the sector to date. It examines the demand and supply of outdoor provision and takes an in-depth look at the profile of the outdoor consumer, taking account of demography, motivation, participation and provision in outdoor sport and recreation in England.

The potential to grow the market is huge. This insight will help us to appreciate the size of the market and the opportunities to increase the number of people who get active outdoors. Customer behaviour and motivation as well as the scale and reach of supply side provision are considered.

We are excited by the opportunity to share this work with you so we can all use this valuable information to better understand our customers and grow the outdoor activity sector.

The outdoor activity market is large and has huge potential

8.9m people are currently active outdoors

Of these 2.8m want to do more

18.2m not currently active outdoors want to re engage and participate in the next 12 months

High quality insight is essential to understand markets and to ensure organisations make informed decisions about where to apply and focus resources so that their outcomes can be achieved. Stakeholders in the outdoor sector will have a wide range of outcomes including commercial, education, charitable and sporting, but one thing common to all is the need for information about what our customers want and need. We hope this work will enhance all of our understanding of a vast and varied market.

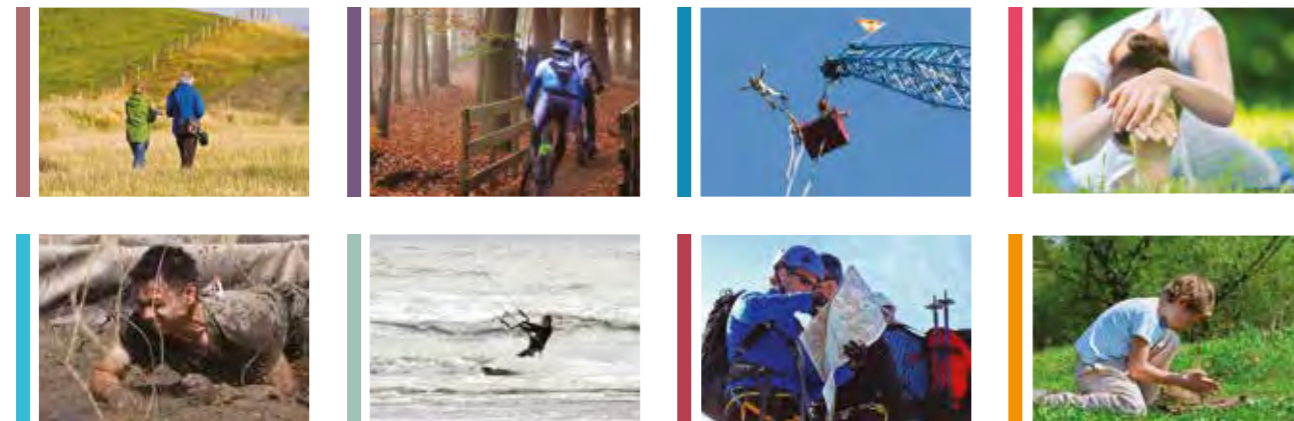
The research looks at the outdoors activity market, its scale, its stakeholders, the trends and opportunities and examines what motivates people to be active in the outdoors and how provision can be mapped against participation to identify gaps and opportunities.

The outdoors means different things to different people and the report covers activity in all environments: sky, snow, water, mountain, parks and urban space. It is evident that a number of consumers enjoy their outdoor experience close to home, the urban environment is a very important part of the outdoor sector and a source of great potential.

Participant Motivations

Understanding consumer's personal preference is a major element of the report. The market segmentation is an in-depth look at the characteristics and motivations of the cross-section of outdoor consumers.

The report identifies eight market segments: Explorer, Thrill Seeker, Learner, Adventurer, Freestyler, Fitness in Nature, Challenger and Tribe Member.



We examine what motivates different people including the activities to meet their needs, what ancillary facilities are important, what combination and number of activities are demanded, what different groups want from providers, where participants source information from and what risk profile people want from activities. We also look at the potential demand and consider what activities could appeal to those not currently participating but suggest they would like to.

Outdoor Activity Provision

The insight also considers the delivery organisations in the sector and groups providers into four broad categories

Sport & Active Recreation

Commercial Facilitation

Development & Learning

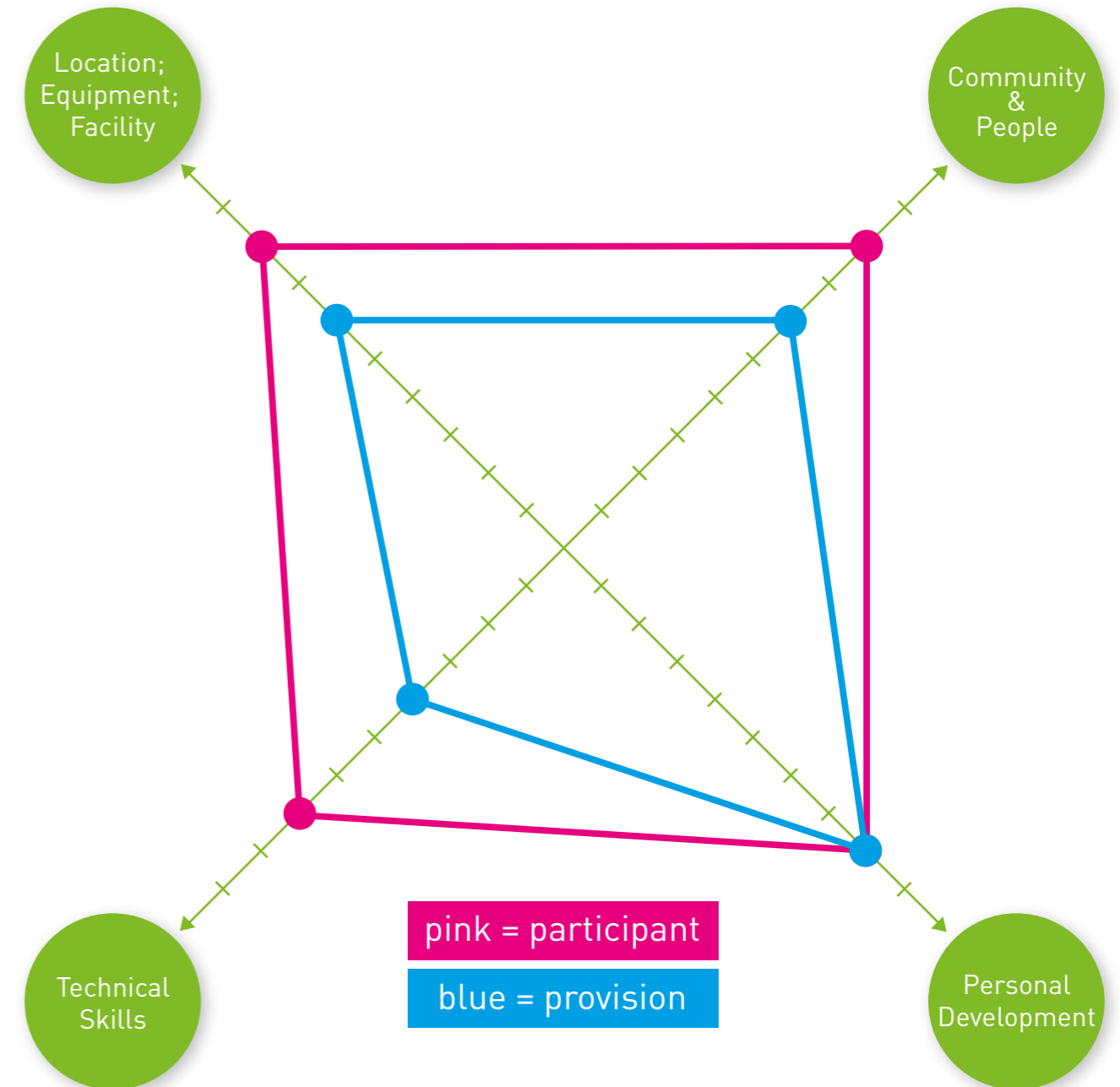
Social Connection

The provision is wide ranging with over 9000 providers. As customer needs change then so too does the provision with a vast array of traditional and informal providers populating the market.

Mapping Provision with Participation

Using insight to draw conclusions and help decision making is essential if it is to have value. We have developed two tools to profile what is delivered and how it is delivered. These profiles can then be directly compared to the motivational requirements of the eight participant segments to see how well the demand is supplied.

At a macro level these tools will enable trends to be assessed but will also be able to be used by individual organisations at a micro level to look at individual products and interventions.



Summary

All good insight stimulates thinking and discussion and leaves you wanting more. We hope this research into the outdoor sector does that but also assists you and your organisation in decisions you make about what you provide, either confirming that you are meeting your customer needs or helping you to consider what to change.

A larger more active sector is in everyone's interest and if this insight helps us to stimulate more activity in the outdoors then it will be playing a very valuable role.



INTRODUCTION

This report aims to build an understanding of the outdoor activities market: who does what, where, when and why, what might encourage them to continue that activity, what stops them participating more, where the latent demands for more outdoor consumers lie and what might motivate latent consumers to consider outdoor activities in the future.

There are a wide variety of demographic, social, urbanisation, political and trend related reasons why outdoor recreation and activities have enjoyed an increase in interest recently. Equally there are significant trends that are constraining and challenging the development of outdoor activities.

Outdoor activities have enjoyed a 3% rise in the last year, while the Active People Survey* indicates that many traditional or formal team sports are showing a decline. The outdoor recreation sector could prove a valuable resource in additional physical activity.

Opportunities to participate as an individual or an informal group, at any time of the day or week, frequently or infrequently, have all contributed to the interest. Environmental and educational trends support families getting active outdoors and the 'Stay-cation' phenomena enjoyed by the UK since the 2008 financial crisis began has helped boost tourism numbers to rural outdoor locations.

Broader social trends toward online communities, informal 'sports', 'flash-fitness' and 'natural fitness' have all helped the sector - military fitness, parkrun, barefoot running, trail running, indoor climbing are all growth sports that encourage an 'outdoor lifestyle'.

This report has pushed the boundaries of our understanding of the outdoor sector, and has revealed many new questions as well as insight. Hence there is great potential for further research and evolution in the future.



*Active People Survey (APS) measures the number of adults (14+) taking part in sport across England. APS is the largest survey of its kind ever undertaken - 165,000 adults (14+) are interviewed each year.

Stakeholder Map

The Outdoors sector is comprised of thousands of small and medium-sized enterprises, charities and government agencies. This map gives examples of the key stakeholders across the Outdoors sector, it is not an exhaustive list.



OUTDOOR ACTIVITY MARKET



This section seeks to define the 'outdoor activity market' in its entirety across the diverse activity environments it provides such as Snow, Mountains and Countryside, Urban and Water. Comparisons between the overall active market in sport and the share of this market that undertake their activity through the outdoors are drawn. The section moves on to explore the growing appeal of the outdoors and the drivers and trends behind this growth.



Outdoors Sports and Activities

Definition of Outdoors Participation

To ensure industry consistency this report's definition of outdoors participation follows the Sports and Recreation Alliance's (ref Reconomics Report) definition:

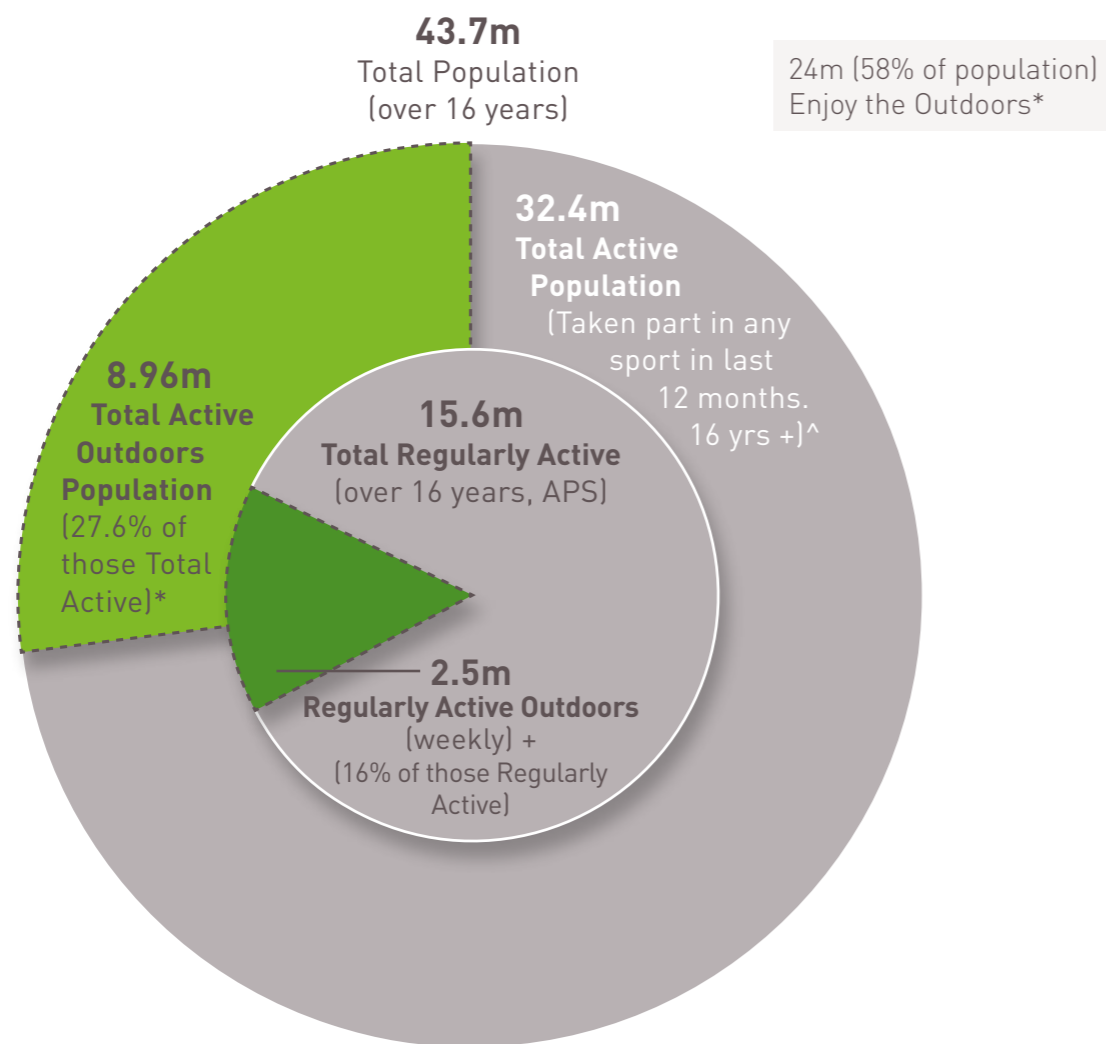
- Outdoor recreation refers to any physical activity taking place in the natural environment
- Does not include outdoor pitches (such as football, rugby or golf)
- Does include purpose-built settings, for example canoeing, skiing and climbing which have their roots in the great outdoors and are predominantly reliant on the natural environment
- Covers all outdoors environments including countryside; space within town/city; canals; rivers; coastal. Not just green space – can be concrete.

Those who participate outdoors do so across a range of sports and activities. The following sports and activities have been included in our aforementioned definition of 'outdoors participation'. However this list is not exhaustive, for example, there are many nuances of the more traditional sports/activities that have not been listed here but would be considered as outdoors sport/activity (for example Adventure racing).



Outdoors Participation in the Overall Sports and Physical Activity Market

The diagram below illustrates the position of the active outdoor population in England in relation to the Total Active Population. 27.6% of the total active population are active outdoors. 16% of the total regularly active population are regularly active outdoors.



^APS 8 Data and Taking Part Survey Data

*Monitor of Engagement with the Natural Environment (MENE), 2012-13 survey. Proportions of the English adult population reporting taking a visit to the natural environment 'for health or exercise'.

+APS Adventure Sports: This group involves the sports of sea fishing, running (cross country/beach, ultra marathon), canoeing/kayaking, canoe polo, rafting, bmx, cyclo-cross, mountain biking, rock climbing, bouldering, mountaineering, mountaineering - high altitude, orienteering, ski-ing (barefoot snow, parachute, extreme, free), swimming (deep water, open water, outdoor swimming/diving), diving - deep water/free, kite surfing, paragliding, sub aqua/scuba diving, surfing, abseiling, caving/pot holing, ice climbing, parachuting, fell running, sky diving, gorge walking. Other APS: rowing (outdoor); sailing; equestrian; triathlon; frisbee; archery; windsurfing; snowboarding; angling; hill walking; skiing (traditional); snowboarding (traditional); Other: parkour; British Military Fitness; Paddle Boarding.

Scale of Current Outdoors Participation

- Combined APS, MENE and external data suggest there is a total of 8.96m people active outdoors, 2.5million (28%) of these are regularly active (once per week or more). Approximately 70% (1.7m) of regular participants are participating in APS measured 'Adventure Sports'.
- APS data suggests participation in 'adventure sports' across sport type and age has been fairly flat over time, however, other industry data sources are showing a growth in participation:
 - MENE (2013/14) reports an overall upward trend in visits taken for health or exercise, with this motivation cited for around two-fifths of visits taken in 2013/14.
 - British Mountaineering Council reported an overall 2% increase in membership (although club membership declined) in 2013; increase in climbing competitions (18% increase from 2012 to 2013); increase in social media and online traffic.
 - Snowsport England recently reported a 12% increase at domestic slopes for the period February to April 2013 to 2014 and a 11% increase for the period May to August 2013 to 2014.
- Market research suggests the outdoors activity market is growing, demonstrated in recent years by:
 - Growth in outdoor activity tourism.
 - Increase in number of outdoors mass participation events: Great North Run; cycling challenges; open water swimming challenges etc.
 - Increase in the number of climbing walls (30% increase from 2010 to 2014) and total number of climbing wall visitors.
 - Overall growth in revenue sales across outdoors commercial sector in recent years: indicators from commercial sales of equipment suggest outdoor sports enjoyed a 3% rise last year. Furthermore, over the last two years there has been a 39% increase in canoe/kayak boat sales.
 - The Mountain Training Association has grown 15% in the last 12 months, demonstrating an example of the growth in independent niche providers.
 - Plas y Brenin and other centres have seen an increase in non-residential participants.

Outdoors Participation

Traditional outdoors participation is perceived as predominantly occurring in rural settings, accessed by white, middle class, car-owning individuals/families doing traditional 'outdoors' activities. To a certain extent, current participation in the outdoors is reflective of this stereotype. However, the landscape is changing and there are several key trends that need to be considered in order to drive growth in outdoors participation.

Shifting demographics:

As the population rises, and life expectancy increases, we're seeing a demographic shift never experienced before in history.

- **The Active Third Age:** those over the age of 60 is set to rise over 40% in the next 20 years (6 times that of those aged under 60). Referred to as the Active Third Age, they are staying active longer; they want to keep the body and mind stimulated.
- **Millennials:** will be 22% of the total population by 2030. They expect personal and tailored experiences.
- **Extended families:** families are extending both horizontally (increase in the number of step-family relationships) and vertically (ageing population). They expect experiences to be flexible, catering for their varied wants and needs.
- **Growing ethnic mix:** in an increasingly multi-cultural population thought needs to be given to catering for the changing cultural make-up. Different cultures have different sporting preferences and recreation habits, activities need to capture the interest and involvement of diverse cultures.



Life expectancy has increased



80% of the population live in cities

Urban living:

80% of population live in cities. The urban citizen values walkability, proximity, comfort and convenience.



Perceived increased nervousness towards using open space

The Fear Factor:

Perceived increased nervousness some people feel towards using open space (fear of dogs, traffic safety, cultural barriers, stranger danger etc.) for themselves or their children. Research shows that 39% of women feel unsafe in the Capital's green spaces. Over 80% of parents state that children get less exercise today because parents are afraid to let them go outside alone.



Supply and demand of lifestyle sports have risen dramatically

Rise of 'lifestyle sports':

In the twenty-first century there are claims that lifestyle sports such as surfing and skateboarding, parkour, wake boarding, paddleboarding, base, jumping and kite surfing are attracting an ever-increasing number of participants (Gilchrist, Paul and Wheaton, Belinda, 2011). Mintel and Key Note statistics indicate that around 10% of the adult population is interested in participating in lifestyle sports, but that the majority of this 10% is drawn from a narrow age and socio-demographic grouping (15-24 year olds, mainly men, from the higher socio-economic classifications).

Technology engrained lifestyles:

Technology is an integral part of people's (particularly young people's) lives. People expect to have access to technology in all environments - being 'connected' and being able to share experiences are important aspects of modern life.

Young people do not separate online and offline activities



The word 'Sport' is a reason to not participate

Participation for functional and lifestyle reasons, not 'Sport':

For many, there is a shift in teenage years towards taking part in activities for more functional or lifestyle reasons. The word 'sport' is a reason to not participate - 60% of adults indicate that they are not more active because they 'just don't like sports', they find the structures a 'turn off'.

OUTDOOR ACTIVITY PARTICIPATION



This section explores the overall why, who, where, when and what of the outdoors market using a vast array of data sources such as the Outdoors Participation Survey (2014); Annual Reports from the Monitor of Engagement with the Natural Environment surveys (2012/13 and 2013/14); national organisation market understanding (National Trust; Forestry Commission; Canal and River Trust; Duke of Edinburgh; among others); commercial consumer data sources; reports; and comparative studies from New Zealand; USA; Northern Ireland and Europe. This section details the eight individualised outdoor participant segments.



Outdoors Participant Profile

Why and Why Not

This section covers the motivations for accessing outdoors activity, all of which vary across ages and life stages. For some participation is about health, fitness and looking good. However for others, participation extends beyond these functional benefits to include having fun; connecting with nature; enjoying the feeling of accomplishment; escaping the pressures of everyday life; keeping them feeling young; allowing them to connect with themselves and those close to them; allowing them to physically challenge themselves. These varying motivations have been used to create eight individualised outdoor participant segments; groups of current and potential participants who desire slightly different experiences from their involvement with the outdoors. The segments are built around the motivations of each participant group, as well as the factors that restrict involvement and present barriers. They are then further individualised by overlaying their unique demographic characteristics (the who), their locational preferences (the where), their participation patterns (the when) and their type of activity preferences (the what).

This section also explains the overall barriers to participation as well as specific barriers facing participant groups (families; BME; deprived communities; disabled; elderly). In addition we draw together the top influencing factors that result in participants starting, stopping and restarting across their life stages.



Sustained participation motivators

Although there are a number of influencing factors that differentiate participants into segment groups (these will be explored in the following pages) there are several key motivating factors that are commonly cited by outdoor participants, these include:

To spend time with family

- 43% of participants first participated in their main outdoor activity with parents/guardian/family - biggest influences in attracting new participants to outdoor activity.
- Spending time with parents and family are the main reasons for participating among youth outdoor participants. As youths get older, the influence of parents, brothers, sisters and relatives is slowly overshadowed by the influence of friends and their own interests.
- 70-80% of all participants feel participation strengthens family relationships.
- Parents of children who are active outdoors are twice as likely to become active themselves. Similarly, the children of parents who are active outdoors are twice as likely to become active themselves.
- Family participation is more likely amongst BME populations and 25 to 44 year olds.
- Those with a long-term illness or disability and those aged 55 are least likely to participate as a family.



To have fun with friends

- 90% of all participants take part to have fun and enjoy themselves.
- Simply having fun with friends is the top motivator for those under 18 years old.
- 31% of participants first took part in their main activity with friends who are already active in the activity or wanted to try the activity - second biggest influence in attracting new participants to outdoor activity after family.



Alternative to traditional sport

- A growing proportion of young people are choosing 'lifestyle sports' as an alternative to more traditional school based sports either as a means of identifying themselves through recognisable styles, expressions and attitudes that develop in and around the activity, or because they have been alienated from more traditional/ institutionalised sports. B.Wheaton, 2005



To enjoy the scenery/ be close to nature

- Research shows that developing a 'connection' with nature, such as enjoyment of scenery and wildlife at favourite places, becomes the more important factor in maintaining levels of physical activity.
- Visits taken by 55 years plus are more likely than those taken by the rest of the population to involve walking without a dog and to be motivated by enjoyment of scenery and wildlife.



For fresh air and to enjoy the weather

- 40% of the population would prefer to take their exercise outdoors, primarily for the fresh air.



To relax and de-stress/get away from modern life

- 92% of people participate outdoors to relax and de-stress. Being active outdoors provides a return to nature and the natural environment - this works as the perfect antidote to the stresses of modern day living.
- For 18 to 24 years, relaxation and exercise become the top motivations. The outdoors provides a breathing space, away from family or peer pressures; a place where they can do what they want; where they can relax and feel free; a comfortable place, without adults, where they won't be told to go away; a place to have a good time with friends.
- Extensive research by Natural England shows strong correlations between outdoor exercise and preventing obesity, diabetes and depression.



Outdoors Participant Profile

Why Not

Research has identified the following key factors affecting people's overall participation in outdoors activities, which may contribute to exclusion and result in under – representation.



Common reasons for not participating outdoors or stopping

Reasons commonly cited for not participating in outdoors activities

- Too busy with family responsibilities (32%)
- Can't commit regularly (30%)
- Don't have the time (30%)
- Prefer to spend spare time doing other things (29%)
- It's too expensive (24%).



Reasons commonly cited for stopping participation in outdoors activities

- Too busy/time constraints (41%)
- Job/studies/school got in the way (35%)
- Family commitments/too busy at home (34%)
- Injury/health reasons (30%)
- No opportunity (20%).



Common barriers facing specific groups

Barriers facing under-represented groups

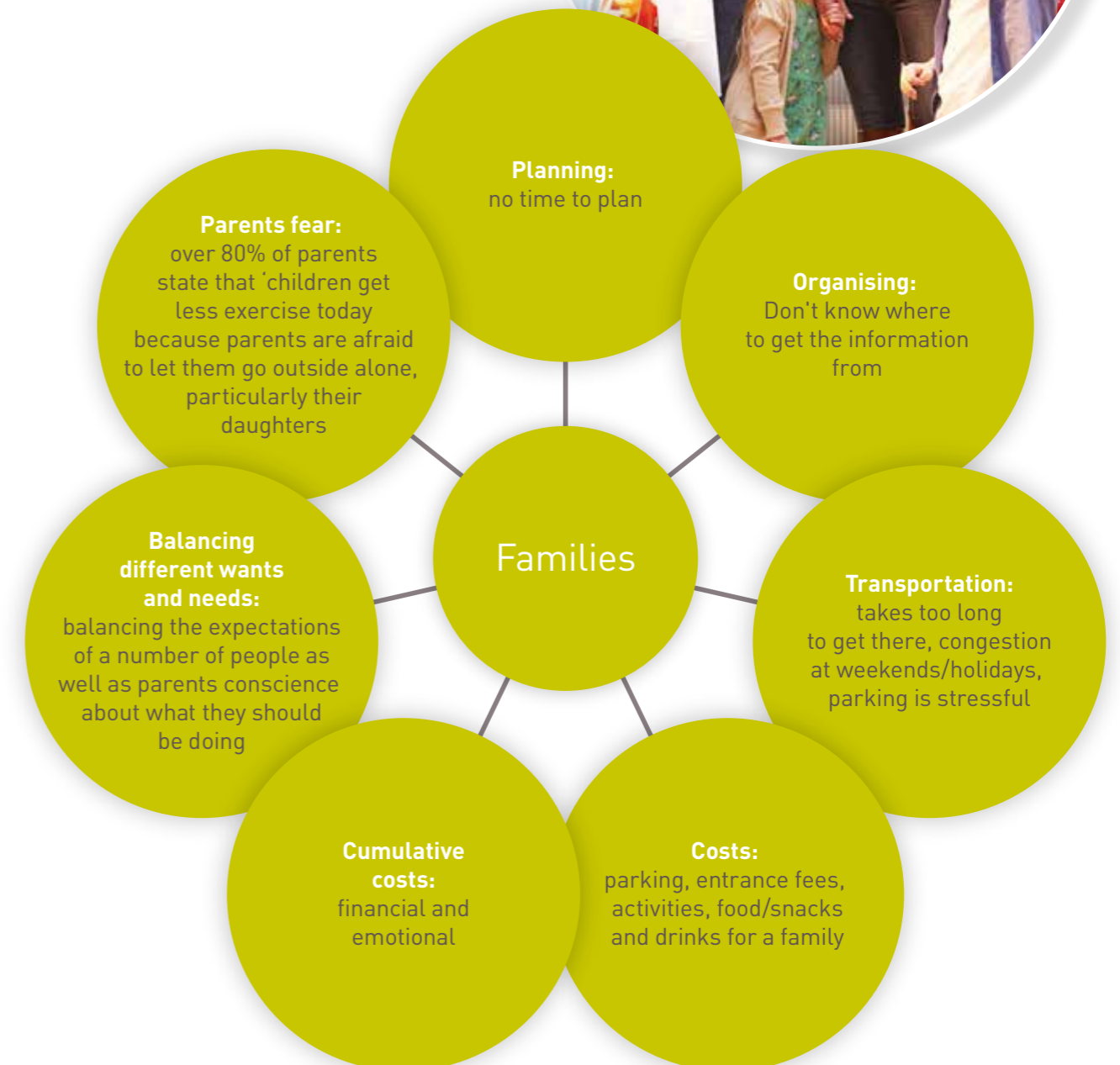
Research has identified the following key factors affecting under-represented groups participation in outdoors activities, which may contribute to exclusion and result in under-representation.



'Why Not' continued...

Barriers facing families

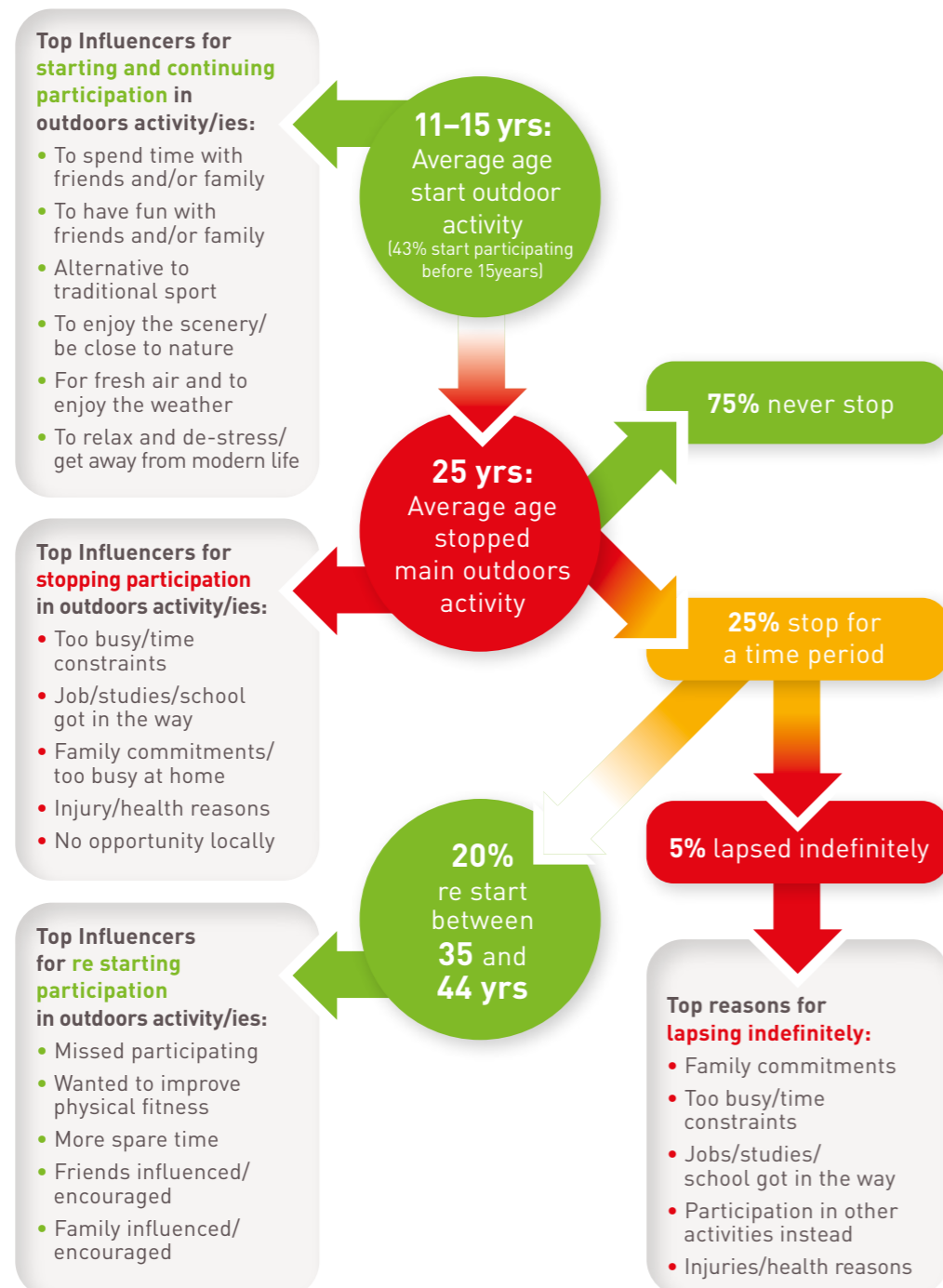
Research has identified the following key factors affecting families participation in outdoors activities, which may contribute to exclusion and result in under-representation.



With multiple and conflicting expectations, time schedules and desires, and cumulative costs, 'outdoor' trips often represent a riskier and more daunting investment of family resource.

Lifecycle of participation

Even though participation in outdoor activities tends to be a way of life, there appears to be a lifecycle of outdoors participation with a lull in participation in mid-twenties, whether marriage and children are involved or not and a re-engagements in late thirties/early forties. During these phases the participant's preference for activities are also likely to change, for example when they are younger they may participate in more lifestyle orientated activities and as they get older they may choose more leisure based activities such as hill walking/rambling.



'Why Not' continued...

Introducing the outdoor participant segments

The next section of the report details the eight participant segment groups, differentiated by the motivations of current and potential outdoor participants.

THE EXPLORER

Profile: Sense of being part of and exploring the natural world. Physical activity is driven by emotional purposes and revolves around exploring and learning. May be secondary to other hobbies such as bird watching or photography.



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THE CHALLENGER

Profile: Put their body on the line and controls the battle against nature. Pushes self and focused on personal achievement/reaching a goal. They probably don't enjoy the majority of the experience, enjoyment comes from gaining a sense of control and learning about themselves. Learnings from the experience are applied to life.



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FITNESS IN NATURE

Profile: Chooses to keep fit outdoors for the fresh air and freedom. Prefers to be exercising outdoors and generally doesn't like the gym or indoor sports. Sense of physical and mental wellbeing and challenging self is important. Competing is not important.



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THE TRIBE MEMBER

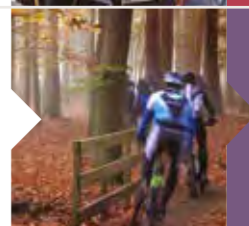
Profile: Committed to their sport or activity and take it very seriously. Training and skill improvement is important to them, as is competing and winning. Likely to be part of a specific club.



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THE ADVENTURER

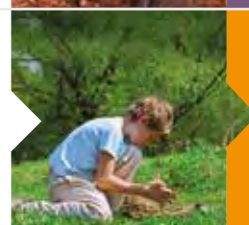
Profile: Lives life to the full. Enjoys the sense of adventure and pushing themselves physically. Personal achievement as well as 'having a good time with their mates' is important to them. The countryside is a giant playground for Adventurers.



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THE LEARNER

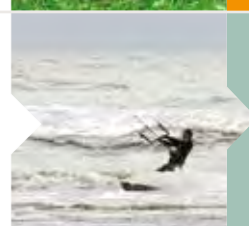
Profile: Primary purpose of visit to outdoors is for learning/personal development, physical activity is used as a means by which to learn/personally develop. These people may discover a love of a sport along the way.



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THE FREESTYLER

Profile: Predominantly young people who are motivated to take part in alternative freestyle sports for the lifestyle and culture that's associated with it. Activities are perceived as 'cool' and play a role in defining who they are and their lifestyle. Music and fashion are fundamental elements of this lifestyle choice.



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THE THRILL SEEKER

Profile: Enjoys taking part in extreme sports and other activities involving physical risk. The experience is all about the adrenaline rush. They enjoy being out of control but are willing for someone/ thing else to manage the risk.

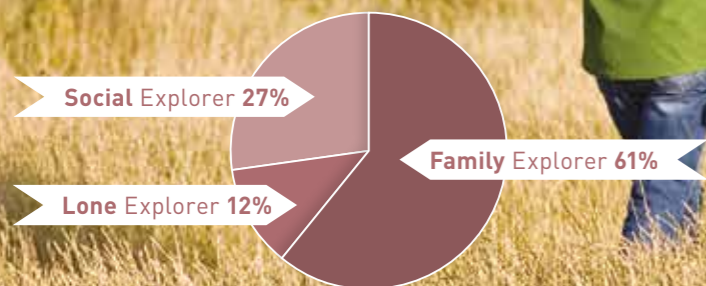


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Sense of being part of and exploring the natural world. Physical activity is driven by emotional purposes and revolves around exploring and learning. May be secondary to other hobbies such as bird watching or photography.

EXPLORER

33%
of Active
Outdoors
Market



Who:

- Highest proportion of female participants in this segment compared to the other segments
- Predominantly aged 35-54 years
- Along with Fitness in Nature, segment with the smallest proportion of individuals under 24 years
- Relatively even split of those with and without children under 18.

Why:

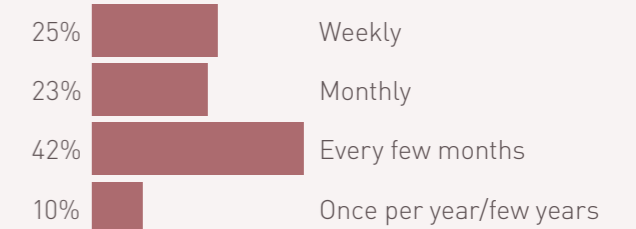
- Segment most likely to have first participated with family (39%) and 22% first participated with friends
- To explore scenery where they like spending time with friends and family; relaxing and unwinding are more important factors than health and exercise
- To make new friends, to develop sport specific skills; to compete/win, for an adrenaline kick are of little importance to them.

Where:

- Segment most likely to participate in the countryside (89%) and seaside (43%)
- Segment least likely to participate in town/city (21%)
- More likely than other segments to participate on a self-organised UK holiday (54%).

When:

- 49% participate throughout the year with a further 38% participating across 2/3 seasons.



What:

- 31% hill walk/ramble, significantly higher proportion than other segments
- 30% also likely to swim
- Participate in an average of three activities
- Most likely activities include camping, hill walking and mountaineering
- 43% Duke Of Edinburgh Awards
- 60% National Trust Members
- Likely to involve another hobby such as bird watching, painting or photography.

Barriers and Transitions:

- More likely than other segments to cite family commitments as barrier to participation
- More likely than other segments to cite 'no opportunity' (perceived and actual) as barrier to participation
- Having more spare time cited as the most likely reason for returning than other segments.

FAMILY EXPLORER



Who:

- Higher than average proportion of females
- Greater proportion are housewives/househusbands and a smaller proportion are retired
- Predominantly 25-44 years
- More likely to have children under the age of 18
- More likely to be higher socio economic group.

Where:

- More likely to have first participated with family and high percentage first participated with family on holiday
- More likely to participate at the seaside and less likely to participate in town - 15% of days out market
- More likely to participate on self organised holiday in the UK.

Why:

- More likely to participate to spend quality time with family and to entertain the children
- Enjoy exploring together with some accidental learning.

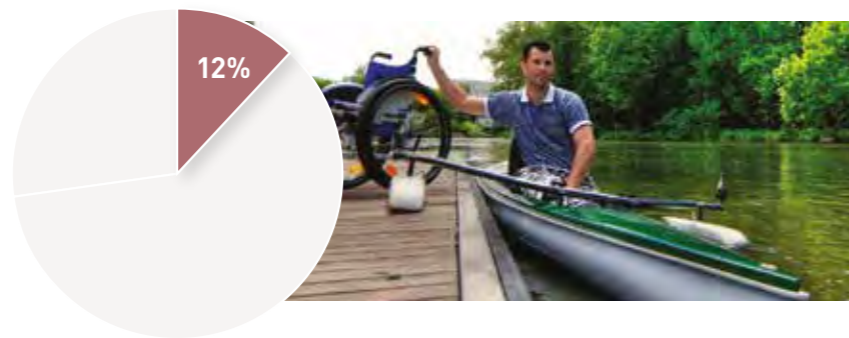
When:

- Participate less frequently, more likely to participate monthly or every few months at weekends and during school holidays
- Less likely to participate throughout the year, more likely to just participate in summer or half the year.

What:

- More likely to consider camping (campsite), canoeing/kayaking, hill walking/rambling and mountain biking as their main activities.

LONE EXPLORER



Who:

- Predominantly 35-64 years – older average age than other sub-groups
- More likely not have children under the age of 18
- More likely to have lower skilled jobs and to be retired.

Where:

- More likely to have first participated on their own
- Less likely to participate in countryside, more likely to participate in town and on river
- More likely to participate within one mile of home
- Less likely to participate on self organized holiday in the UK or abroad.

Why:

- Spending time with friends and family less important.

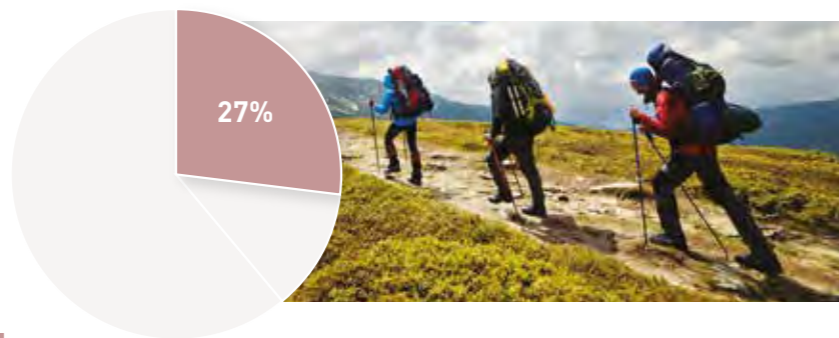
When:

- Participate more frequently than average Explorer, with higher proportion participating monthly
- More likely to participate for three seasons.

What:

- More likely to consider running and angling as their main activities
- Less likely sub-segment to consider camping as their main activity.

SOCIAL EXPLORER



Who:

- Predominantly 24-54yrs
- More likely not have children under the age of 18
- Higher proportion of students.

Where:

- More likely to have first participated with friends
- High percentage participate in countryside but more likely of all sub segments to participate in town
- More likely to travel more than 10 miles to participate and participate on self organised holiday outside the UK.

Why:

- More likely to participate to spend time with friends and colleagues
- Older people are looking for a peaceful experience with like minded people.

When:

- Participate more frequently than average Explorer, with higher proportion participating monthly
- More likely to participate throughout the year.

What:

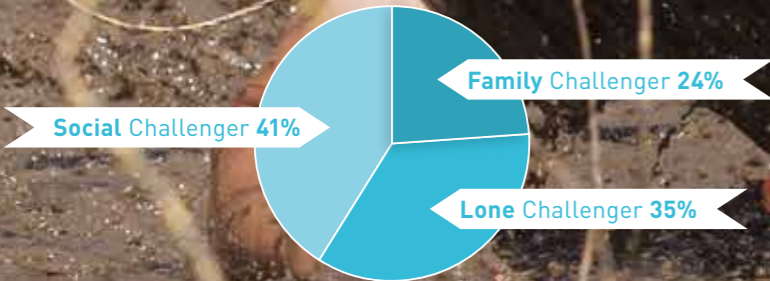
- More likely to consider climbing and mountain biking as their main activities
- Less likely to consider camping and rambling as their main activity.

Put their body on the line and control the battle against nature. Pushes self and focused on personal achievement/reaching a goal. They probably don't enjoy the majority of the experience, enjoyment comes from gaining a sense of control and learning about themselves. Learnings from the experience are applied to life.



21%
of Active
Outdoors
Market

CHALLENGER



Who:

- Higher than average male participation (74%)
- Mainly 24-54 years. Age more evenly split across this age category than many other segments
- High proportion of participants working at management level
- Segment most likely to have started participating at an older age
- Less likely to have children under 18.

Why:

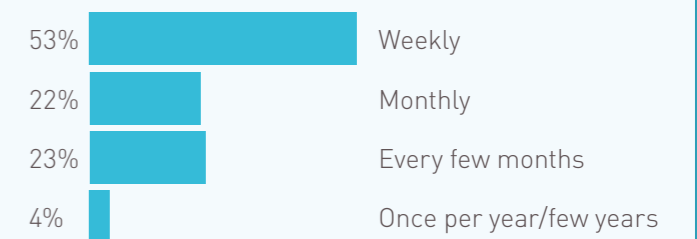
- Segment most likely to have first participated on their own (21%)
- To challenge self or achieve something is of high importance along with health benefits. These are more important than fun, enjoyment and spending time with friends and family
- Although challenge is an important motivating factor, competing does not motivate this segment. Pushes self to best previous physical performance/reach a goal
- Quality of experience more important than quality of company
- The challenge may be risky but, unlike the Thrill Seeker, they are in control of the risk.

Where:

- 45% participate in countryside and 31% participate in town/city
- Segment most likely to travel over 10 miles to participate (72%).

When:

- Segment most likely to participate throughout the year (75%).



What:

- Participate in an average of four or five activities. Most likely combination of activities include mountaineering; hill walking; running; mountain biking
- Other activities include canoeing/kayaking; angling; boot camps; snowsports; orienteering; sailing; horse riding
- Use specialist equipment and books to help them make the most of their activities
- Participate in a range of challenge orientated events, including running (e.g. 10k, marathons); walking (e.g. 3 Peaks); cycling (e.g. Coast to Coast); swimming (Great North swim); adrenaline junky (e.g. abseiling, zip sliding, skydiving); multi activity (e.g. Castles triathlon).

Barriers and Transitions:

- Along with Fitness is Nature, more likely to cite injury/health reasons as barrier to participation
- Along with Fitness is Nature, to improve physical fitness cited as the most likely reason for returning than other segments.

FAMILY CHALLENGER



Who:

- Slightly higher than average proportion of females
- Predominantly 35-54 years. Larger proportion started at under 15 years
- More likely to have children under the age of 18.

Where:

- More likely to have first participated with family
- More likely to participate in countryside
- Less likely to participate in town
- Less likely to travel to participate.

Why:

- More likely to participate to spend time with family and to entertain the children.

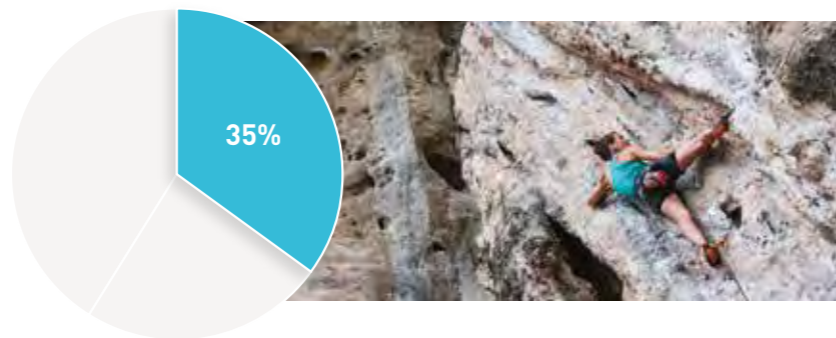
When:

- Participate less frequently, more likely to participate monthly or every few months
- Less likely to participate throughout the year, more likely to just participate in summer or half the year.

What:

- More likely to consider camping (campsite) and hill walking/rambling as their main activities.

LONE CHALLENGER



Who:

- Predominantly 35-54 years
- More likely not to have children under the age of 18.

Where:

- More likely to have first participated on their own
- Less likely to participate in countryside, more likely to participate in town
- More likely to participate within 1 mile of home
- Less likely to participate on self organised holiday in the UK or abroad.

Why:

- Goal orientated, driven by a need to personally achieve something/learn about self
- Is self reliant and wants to make self reliant choices
- Spending time with friends and family less important.

When:

- Participate weekly and throughout the year.

What:

- More likely to consider running as their main activity.
- Less likely to consider hill walking and mountain biking as their main activity.

SOCIAL CHALLENGER



Who:

- Higher proportion of males
- Predominantly 24-54 years – lower average age than other sub-segments
- More likely not to have children under 18.

Where:

- More likely to have first participated with friends
- More likely to participate in countryside
- More likely to travel more than 10 miles to participate.

Why:

- More likely to participate to spend time with friends and colleagues.

When:

- Participate weekly and throughout the year.

What:

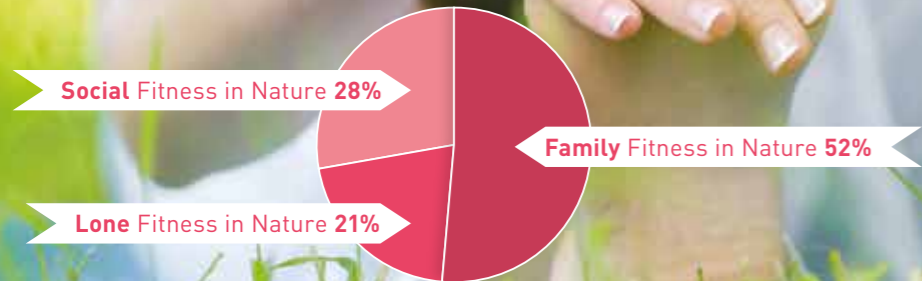
- More likely to consider climbing, running and mountain biking as their main activity.

FITNESS IN NATURE



Chooses to keep fit outdoors for the fresh air and freedom. Prefers to be exercising outdoors and generally doesn't like the gym or indoor sports. Sense of physical and mental wellbeing and challenging self is important. Competing is not important.

17%
of Active
Outdoors
Market



Who:

- Equal proportion of male and female participants
- Majority are over 35 years. Higher than average age across segments
- High proportion of participants working at management level and retired
- Less likely to have children under 18.

Why:

- 33% first participated with family; 30% with friends; 18% on their own
- Health and exercise is most important for this segment compared to other segments. 44% of gym users prefer to exercise outdoors
- To challenge self/achieve something is also of high importance however competing is not important
- Use outdoor gyms to keep fit and healthy at low cost and to spare the awkwardness and embarrassment of working out in front of 'gym bunnies'.

Where:

- 42% participate in countryside and 29% participate in town/city
- Most likely segment to participate close to home (within five miles) and least likely to travel more than 10 miles or participate on holiday
- 20% of outdoor fitness classes are in urban areas
- Segment most likely to participate in, on or by a river or canal.

When:

- Likely to participate throughout the year (71%) or across three seasons (15%).



What:

- Participate in an average of three or four activities
- Most likely activities include hill walking; mountain biking; outdoor fitness classes; running
- Other activities include climbing; orienteering; canoeing/kayaking; angling; horse riding; outdoor swimming
- 50% of outdoor classes are circuit classes and 10% are fitness walking
- 30% of participation is equipment based (outdoors gyms).

Barriers and Transitions:

- Along with Challenger, more likely than other segments to cite injury/health reasons as barrier to participation
- Along with Challenger, to improve physical fitness cited as the most likely reason for returning than other segments.

FAMILY FITNESS IN NATURE



Who:

- Slightly higher than average proportion of females
- Greater proportion are housewives/househusbands and a smaller proportion are retired
- Predominantly 35-54
- More likely to have children under the age of 18
- Larger proportion started under 15 years.

Why:

- More likely to participate to spend time with family and to entertain the children
- Fitness is important to the whole family and prefer to exercise outdoors together than indoors.

When:

- Participate less frequently, more likely to participate monthly or every few months
- Less likely to participate throughout the year, more likely to just participate in summer or half the year.

What:

- More likely to consider camping (campsite), hill walking/rambling and mountain biking as their main activities.

LONE FITNESS IN NATURE



Who:

- Predominantly 35-54
- More likely not to have children under the age of 18.

Why:

- Easy and accessible way to exercise. More likely to be built into daily/weekly routine
- Sense of physical and mental wellbeing is most important to this sub segment
- Spending time with friends and family less important.

Where:

- More likely to have first participated on their own
- Less likely to participate in countryside, more likely to participate in town
- More likely to participate within one mile of home.

When:

- More likely to participate weekly and throughout the year.

What:

- More likely to consider climbing and running as their main activities
- Less likely to consider camping; hill walking; mountain biking as their main activities.

SOCIAL FITNESS IN NATURE



Who:

- Predominantly 24-54 years – lower average age than other sub-segments
- More likely not to have children under the age of 18.
- Higher proportion of students.

Why:

- More likely to participate to spend time with friends and colleagues
- To keep fit but also be sociable.

Where:

- More likely to have first participated with friends
- More likely to travel more than 10 miles to participate.

When:

- More likely to participate weekly and throughout the year.

What:

- More likely to consider running; hill walking; mountain biking; outdoors classes as their main activities
- Women are more likely to participate in walking groups; mums and babies classes; outdoor yoga. Men are more likely to participate in boot camp classes.



Committed to their sport or activity and take it very seriously. Training and skill improvement is important to them as is competing and winning. Likely to be part of a specific club.

9%
of Active
Outdoors
Market

TRIBE MEMBER



Who:

- Predominantly male participants
- Predominantly 24-44 years
- This segment also includes those that are qualified to lead others (the rescue team member; the Duke of Edinburgh leader; the qualified club coach)
- Less likely to have children under 18.

Why:

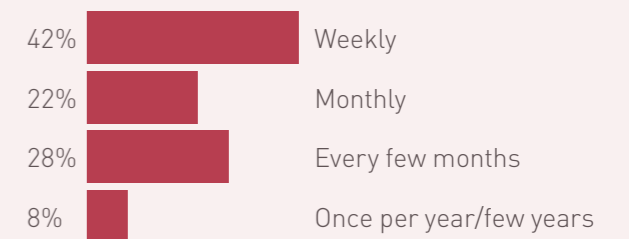
- One of the least likely segments to first participate on their own
- Like being part of a team but have chosen the particular sport as they love being outdoors
- Developing sport specific skills is a more important factor for Tribe Members than other segments
- Experiencing an adventure, exploring, challenging oneself, health and exercise and having fun as part of a social group are also important motivational factors
- Spending time with friends is important but spending time with family is significantly less important
- They are more likely to compete than any other segment
- Leaders get a tremendous sense of purpose out of facilitating others.

Where:

- Segment most likely to have first participated at a club (25%)
- 83% participate in countryside
- 30% travel more than 10 miles to participate.

When:

- 64% participate throughout the year, a further 25% participate for 2/3 seasons
- The more frequently people participate in a watersport, the more likely they are to be a member of a club or association.



What:

- Participate in an average of four activities
- Most likely activities include camping; hill walking; mountain biking
- Other activities include angling; canoeing/kayaking; rowing; mountaineering.

Barriers and Transitions:

- More likely than other segments to cite being too busy/time constraints and job/studies/school as barriers to participation
- Missing participating in the outdoor activity and having more money to invest cited as the most likely reason for returning than other segments.

Lives life to the full. Enjoys the sense of adventure and pushing themselves physically. Personal achievement as well as 'having a good time with their mates' is important to them. The countryside is a giant playground for Adventurers.

ADVENTURER

7%
of Active
Outdoors
Market



Why:

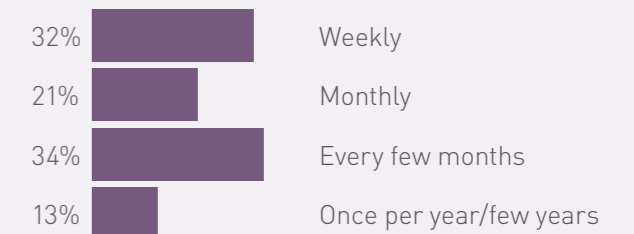
- 37% first participated with family and 25% first participated with friends
- Similar motivations as Explorers however participating for health and exercise; fun; adrenaline kick; challenging self is more important for Adventurers than for Explorers
- To compete and develop sport specific skills are not important to Adventurers
- Impressed by the spectacular, they're 'collecting' experiences which will feature in the anecdotes of their life
- For teenagers 'wild adventure' provides outlets for energy otherwise liable to be expressed as anti-social behaviour.

Where:

- 47% participate in countryside. 23% participate in town/city
- 22% participate on self organised UK holidays than other segments (41% are aged 25-34 years)
- Like to try new experiences and places – thrive on diversity.

When:

- More likely than other segments to participate in summer only or just two seasons.



What:

- Activities need to be exciting, high energy. Participants have a certain level of competence in order to manage the risks that are inherent in adventure activities
- Participate in an average of four activities. Most likely activities include camping; climbing; hill walking; mountain biking
- Other activities include angling; outdoors swimming and diving; horse riding; running; sailing; snowsports
- Own specialist equipment and are keen on exhibiting their love of outdoors adventure with the day-to-day clothes that they wear.

Barriers and Transitions:

- More likely than other segments to cite location not convenient as barrier to participation
- Child(ren) being interested in participating cited as the most likely reason for returning than other segments.

FAMILY ADVENTURER



Who:

- Predominantly 35-54 years
- Highest proportion of those that started under 15 years; are housewives/househusbands; have children under 18 years.

Where:

- More likely to have first participated with family and/or family on holiday
- More likely to participate in countryside; on a river; on self organised holiday in the UK
- Less likely to participate in town; travel over 10 miles from home.

Why:

- More likely to participate to spend time with family and to entertain the children
- Love action-packed days out that give instant gratification.

When:

- Participate less frequently and more likely to just participate in summer/half the year.

What:

- More likely to consider camping (campsite) and hill walking/rambling as their main activity. Fewer consider climbing as their main activity
- Activities/communications that are non-prescriptive, want to make their own adventure
- More likely to use technology to help them make the most of their time.

LONE ADVENTURER



Who:

- Predominantly 24-64 years
- More likely not to have children under the age of 18 years
- More likely to have lower skilled jobs.

Where:

- More likely to participate on their own within 1 mile of home than other sub-segments
- Less likely to participate on self organised holiday in the UK.

Why:

- More likely to participate to spend time on their own.

When:

- With Social Adventurer, more likely to participate frequently and throughout the year.

What:

- More likely to consider climbing; hill walking; mountaineering; running as their main activities
- Less likely to consider camping as their main activity.

SOCIAL ADVENTURER



Who:

- Predominantly 24-44 – lower average age than other sub-segments
- Highest proportion of male participants and students.

Where:

- More likely to have first participated with friends
- More likely to participate in town or town fringe
- More likely to travel more than 10 miles to participate
- More likely to go on a specific adventure holiday.

Why:

- More likely to participate to spend time with friends and colleagues.

When:

- With Lone Adventurer, more likely to participate frequently and throughout the year.

What:

- More likely to consider climbing and mountain biking as their main activity
- More likely to participate in watersports - surfing; sailing; canoeing/kayaking.



Primary purpose of visit to outdoors is for learning/personal development, physical activity is used as a means by which to learn/personally develop. These people may discover a love of a sport along the way.

LEARNER

7%
of Active
Outdoors
Market



Who:

- Relatively more males compared to the average but not the highest segment in terms of proportion
- Predominantly 24-54 years
- Less likely to have children under 18.

Why:

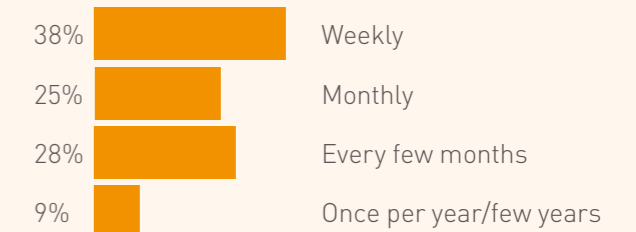
- Segment most likely to have first participated with friends (30%). Also likely to have first participated with family (34%)
- The motivation of developing a sense of self worth is highest in this segment compared to other segments
- To have fun, be close to nature, learning something and challenging oneself are important motivational factors for learners
- They are not motivated by making new friends or competing.

Where:

- 84% participate in countryside and 60% participate on/in water
- 24% participate in towns/cities
- Majority travel more than 10 miles to participate (68%).

When:

- 64% participate throughout the year (64%), a further 27% participate 2/3 seasons.



What:

- Participate in an average of four activities
- Most likely activities include camping; hill walking; mountain biking
- Other activities include angling; canoeing/kayaking; horse riding; orienteering; mountaineering; running.

Barriers and Transitions:

- More likely than other segments to cite participating in other activities and not having any opportunity as barriers to participation
- Having more spare time cited as the most likely reason for returning than other segments.

FREESTYLER

Predominantly young people who are motivated to take part in alternative freestyle sports for the lifestyle and culture that's associated with it. Activities are perceived as 'cool' and play a role in defining who they are and their lifestyle. Music and fashion are fundamental elements of this lifestyle choice.

(This segment has been informed by desk based research only)*

4%
of Active
Outdoors
Market

Source: 'Lifestyle sports and national sport policy: an agenda for research', Alan Tomlinson, Neil Ravenscroft, Belinda Wheaton, Paul Gilchrist. Report to Sport England, 2005

"Lifestyle sport, public policy and youth engagement: examining the emergence of parkour", Paul Gilchrist and Belinda Wheaton. 2011



Who:

- Predominantly male participants 16-24 years
- In recent years there has been a growth in participation amongst older aged men, women and girls
- Participation is more likely than other section to be across socio-economic groups, including the most socially disadvantaged
- More likely to include those who have turned their back on traditional school-based and institutional sport practices.

Why:

- Social engagement and spending time with friends is important to this segment
- Participation is a way of life: self-expression and self – identity through association with the activity is as important as participation in the activity. The clothing, music, brands etc. define who they are
- Motivated by the culture and ethos of 'freestyle activities' that allow for freedom of expression and are more inclusive, anticompetitive and less rule-bound than most traditional sports
- Attracted to managed risk-taking.

Where:

- More likely than other segments to participate in urban environments and in spaces outside of the traditional forms of provision such as schools, clubs and leisure centres
- Likely to compete at lifestyle events such as Wakestock.

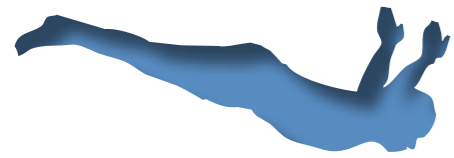
When:

- Likely to participate throughout the year
- As participation is part of their day to day lifestyle they are likely to participate on a regular basis.

What:

- Wide range of mostly individualised activities, ranging from established sports such as climbing, surfing and skateboarding, to new activities such as parkour, wakeboarding and kite surfing
- Likely to participate in a range of activities across seasons that underpin the culture of 'freestyle activities', for example, likely to surf and snowboard
- Greater awareness via online content (e.g. YouTube, Facebook, Twitter).

Enjoys taking part in extreme sports and other activities involving physical risk. The experience is all about the adrenaline rush. They enjoy being out of control but are willing for someone/thing else to manage the risk.



THRILL SEEKER

3%
of Active
Outdoors
Market



Who:

- Higher than average male participation (80%)
- Predominantly 24-34 years
- Less likely to have children under 18.

Why:

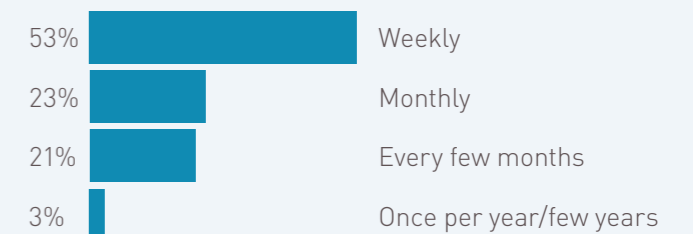
- Segment most likely to have started with friends during teenage years
- Experiencing an adrenaline kick is of high importance to them, more so than any other segment. They are looking for a buzz - either physical or emotional
- As with Challenger and Adventurer, having an adventure and challenging self/achieving something and having fun are important to them but in the context of experiencing an 'adrenaline kick'
- Achieving the personal 'buzz' is more important than spending time with friends
- Participating for health and exercise; to entertain the children; to compete are not important to Thrill Seekers
- They thrive off the perceived risk of the activity, but, unlike the Challenger, they want someone/thing else to control the risk.

Where:

- Equally likely to participate in rural and urban environments.

When:

- When participating more likely to participate regularly and throughout the year. However more likely than other segments to stop and start participation throughout life stages.



What:

- Participate in an average of six activities – segment to participate in widest range of activities
- Most likely activities include mountaineering; mountain biking; snowsports; canoeing/kayaking
- Other activities include rafting; cycle cross; sailing; surfing; base jumping.

Barriers and Transitions:

- More likely than other segments to cite not being able to afford to participate and unable to commit as barriers to participation
- Along with Tribe Member, friends encouraging to return and having more money to invest cited as the most likely reason for returning than other segments.

Outdoors Participant Profile

Who

This section covers the demographic characteristics of those that are most likely to be active outdoors as well as those that are least likely to be active outdoors.

Characteristics of those most likely to be active outdoors

Majority are white, working, middle class:

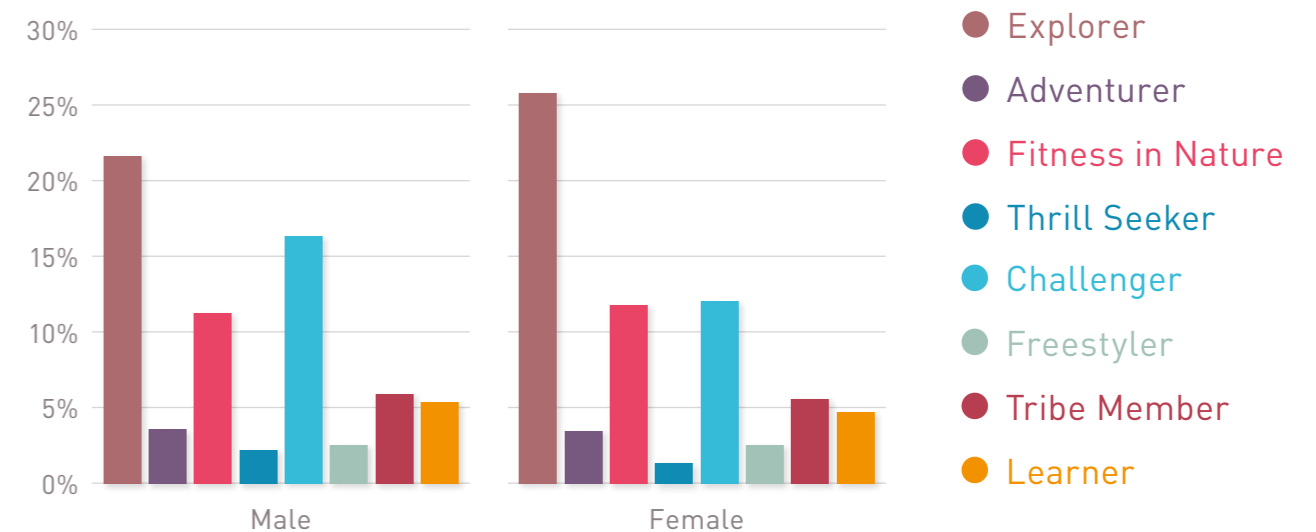
- More likely to live in affluent areas (AB and C1 socio-economic groups) with access to a car.
- 78% are self-employed or work full time or part time.
- Over 80% of outdoors participants are White British.



**OUTDOOR
ACTIVITY
PARTICIPATION**

Men are more likely to be active outdoors

- Whilst both male and female participation shows an overall upward trend, males tend to be more active outdoors than females.
- However MENE (2013/14) showed male participation suffered a dip between 2012/13-2013/14.
- The Explorers are the only segment with a higher proportion of female participants (45% male and 55% female).
- Mountain biking, running, mountaineering, climbing and harder adventure activities all have a slight male bias. Keeping fit outdoors, particularly walking and classes have a slight female bias. Women are more likely than men to short hike (Commercial Consumer Data Source, '14).



"What is your gender?" Outdoor Participation Survey 2014

Age

Upward trend across all ages

- MENE (2013/14) reported all age groups currently show an overall upward trend.
- The fastest growing demographics in the outdoor market are older people, with people aged 55 and over being the group most motivated by health and exercise (50%).

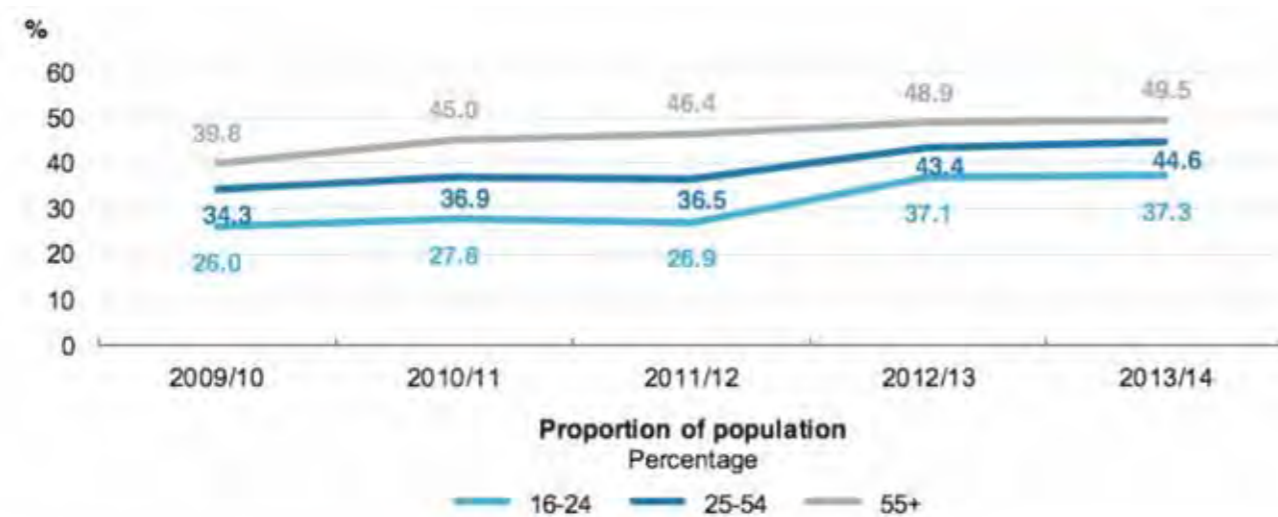


Figure 8.3 – Proportion of respondents reporting health and exercise motivations

Q12_05 Which of the following, if any, best describe your reasons for this visit? For health or exercise (Base: 2009/10 N=4,755, 2010/11 N=3,973, 2011/12 N=4,421, 2012/13 N=16,429, 2013/14 N=18,808)

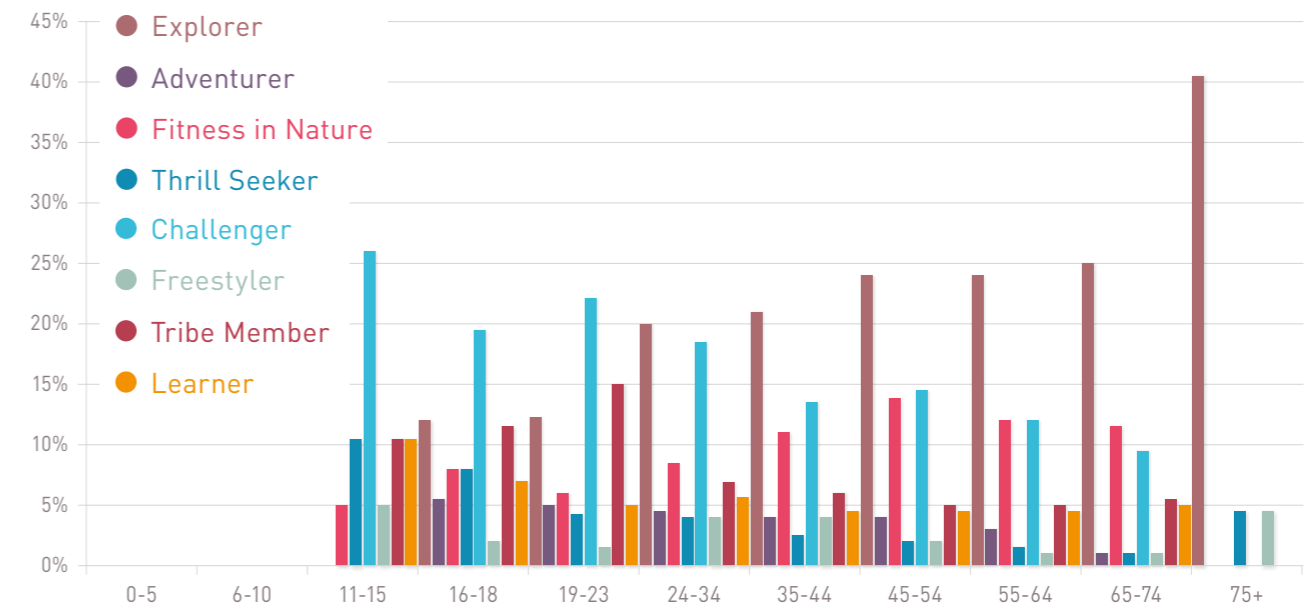
Source: Annual Report from the Monitor of Engagement with the Natural Environment 2013-14 survey, Natural England.



'Who' continued...

Motivations, activities and environments vary by age

- Younger age groups are more likely to be Challengers, Tribe Members and Learners.
- Older age groups are more likely to be Explorers and Fitness in Nature.



"What is your age?" Outdoor Participation Survey 2014



Active families

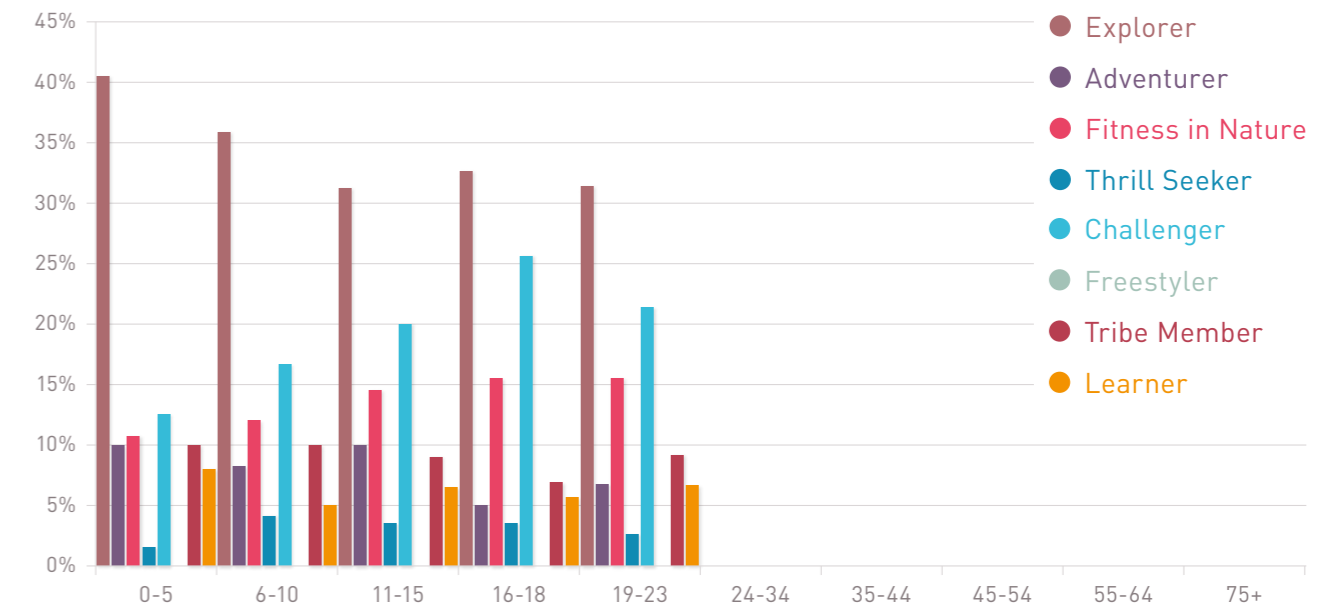
- Slightly more people participate who do not have children U18 years (55%). However, those that do have children U18 years participate more frequently.
- Fitness and Nature and Adventurer are more likely to have Children U18 years.
- Taking part in day visits for active pursuits/sports were more likely to involve those with children (GB Day Visits 2012, Visit England).
- Approximately 70% of all children who participate outdoors do so with an adult from their household. 15% of all children took visits with their grandparents (MENE, '13).



'Who' continued...

Once connected to nature, committed for life

- 43% start participating before 15 years and 100% started before 23 years [a similar pattern was reported in the recent Snowsports and Watersports Participation surveys, 2013].
- Early exposure to outdoor activities can make a lasting impression. More who are introduced to outdoors activities as children and adolescents grow up to choose an active outdoors lifestyle. Explorers start at an early age whilst other segments are more likely to start in early teens.
- 15% more people in the UK aged over 55 had enjoyed outdoor experiences in their childhood compared to people between 15 and 34 years old. 92% of the British public agree that these experiences are still important to children today, and 82% agree that schools should play a role in providing them to all children (RSPB, Every Child Outdoors, 2010).



"What age did you start participating?" Outdoor Participation Survey 2014



Characteristics of those less frequently active outdoors

Black and Minority Ethnic community groups

- On average 24% of people in the BME population regularly visit the natural environment, compared to 38% of the rest of the population (MENE, '13)
- BME & urban population groups tend to have low car access and are constrained by a lack of time. Their visits tend to be near to home (69% of visits), more urban locations and taken for more functional purposes.
- 54% of visits taken by the BME population included an urban park, more than double the proportion for the rest of the population (21%). 32% state visit is for health and exercise reasons and/or playing with children, 22% for entertaining the children.
- Outdoor participants from BME population are more likely to have children at home (MENE, '13)
- For barriers facing BME communities see page 60.



'Who' continued...

Those living in deprived communities

- People's level of physical activity outdoors is related to affluence, or lack of it. In the most deprived wards, where quality of green space provision is lower, only 40% of adults engage in moderate physical activity, compared to nearly 60% in the most affluent wards.
- People living in a deprived community are six times more likely to have had no previous experience of outdoors activity.
- Those in DE Socio economic groups are more likely than the rest of the population to live in urban areas and less likely to have access to a car. Similar to the rest of population in terms of age profile, presence of children in home and dog ownership.
- For barriers facing those living in deprived communities see page 60.



Outdoors Participant Profile

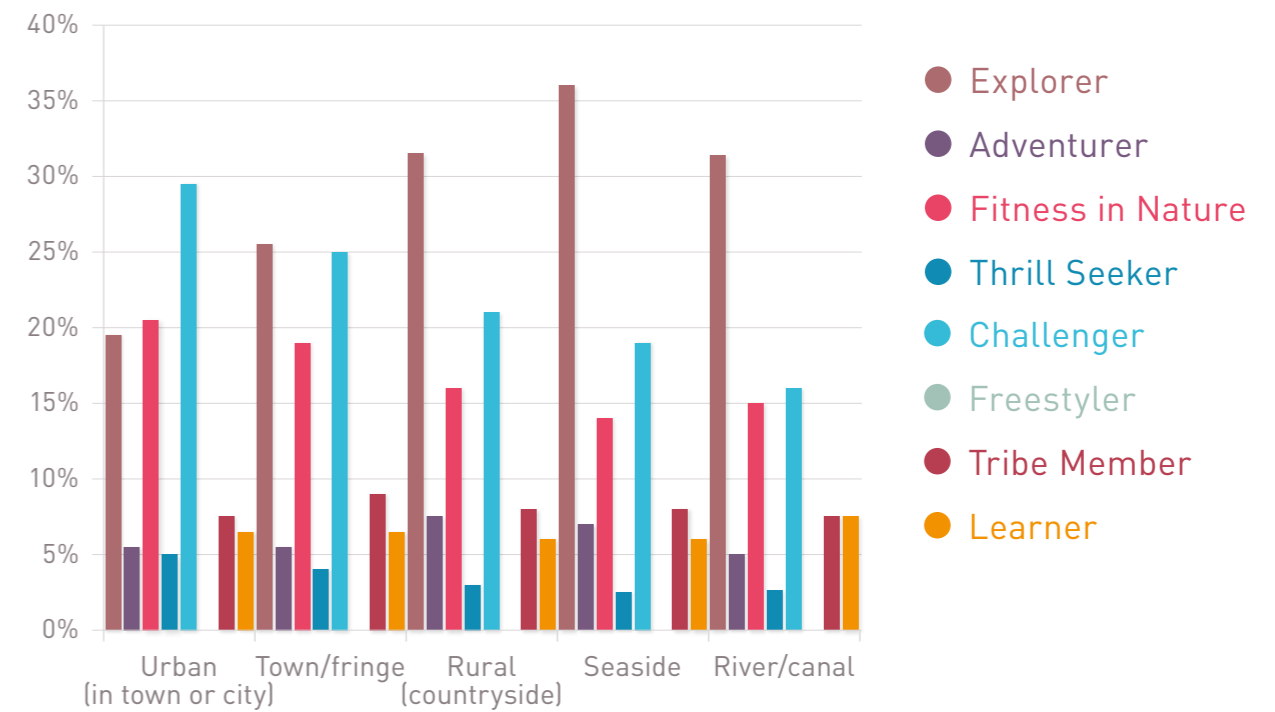
Where

This section covers the type of environment participants access (such as countryside, urban, seaside and river/canal) as well as travelling preferences and geographical spread.

Middle aged, white middle class, visit the countryside.

Young people and under represented groups visit towns/cities

- 44% participate in the countryside. These participants are more likely to be white; higher social grade; over 45 years.
- 25% participate in town/city. These participants are more likely to be from BME communities; lower social grades; 16-24 years.
- However, MENE (2013/14) data suggests a possible trend for decreased visits to countryside destinations and increase visit levels to destinations in towns and cities.
- 'Informal leisure' visits are the main driver of canal visits, in particular walking, running and cycling. (Canal and River Trust, 2014).
- Highest user of canals and rivers are 35-44 years and 65 years plus (Canal and River Trust, 2014).
- An estimated 7% of urban park-users in England go there for sporting activities (approx. 7.5m visitors per year).
- Explorers, particularly old age group are more likely to participate in the countryside and at the seaside.
- Challengers are more likely to participate in towns/cities.
- Participants who BMX; parkour; go to outdoors fitness classes/boot camps are also more likely to participate in town/city.
- Participants who hill walk/ramble; mountaineer; orienteer and do assault courses are more likely to participate in the countryside.



"In which of the following places have you undertaken your main outdoor activity during the last 12 months?"
Outdoor Participation Survey 2014

Local, good quality infrastructure is an important influencing factor

- MENE results (2013/14) show that the number of visits made to the natural environment for health and exercise in the last week is connected to the relationship between the amount of local greenspace and levels of physical activity, irrespective of where the physical activity takes place.
- When people have good access to greenspace (perceived and/or actual) they are 24% more likely to be physically active (Natural England, 2012).
- BME & urban population group participants tend to participate nearer to home, in more urban locations. However people from BME and deprived communities tend to have less local green space and it is of a poorer quality.
- Fitness in Nature are most likely to participate from their doorstep.
- 65% of current participants do activities over 10 miles from home. Thrill Seekers and Challengers are most likely to travel. Explorers and Adventurers are most likely to participate whilst on holiday.
- However 65% of those who are interested in participating outdoors or just starting out are more likely to participate less than 2 miles from home.

Location

Activities close to home

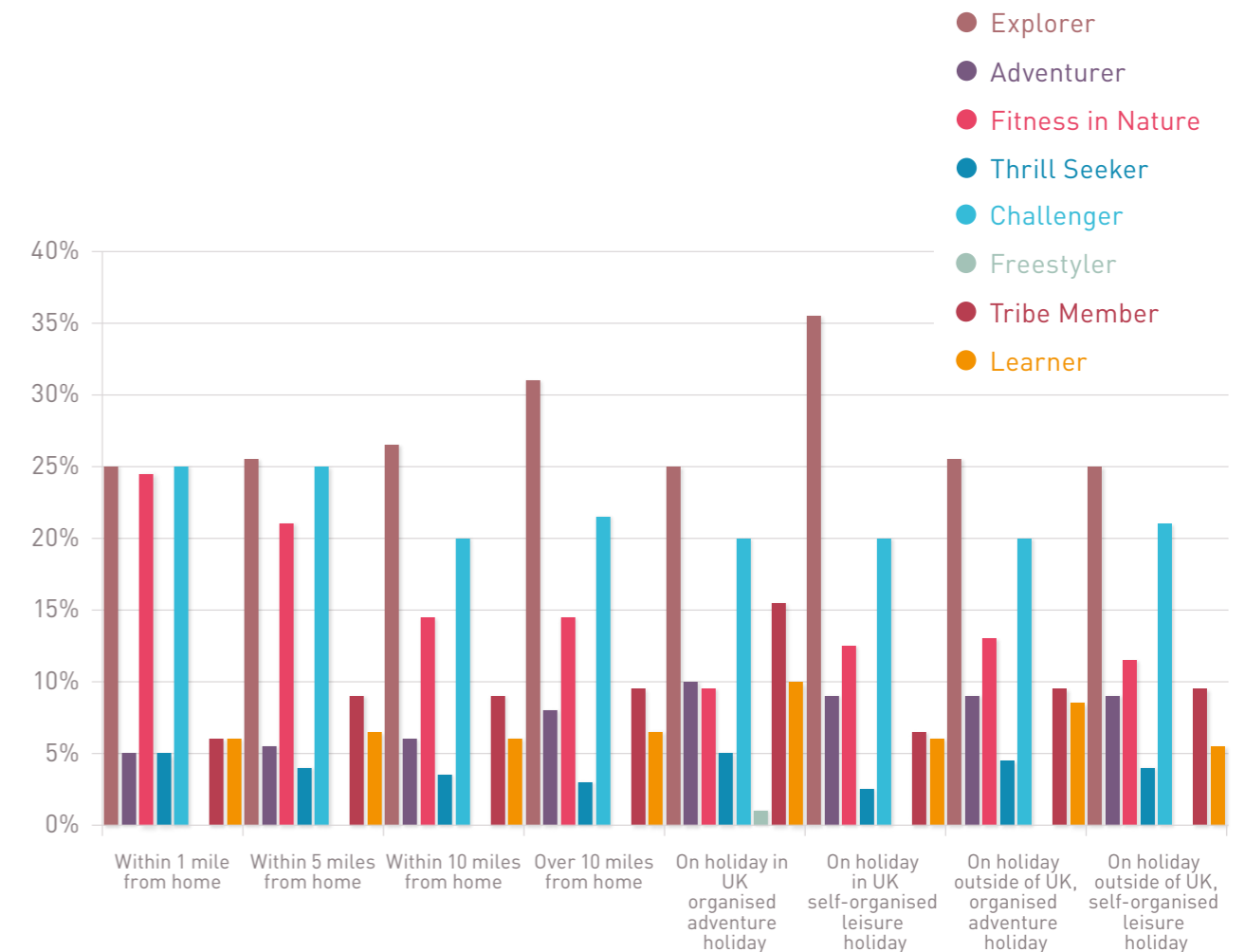
- Activities participants are most likely to do within 5 miles of home include parkour; outdoor fitness classes/bootcamps; BMX; running.

Activities people travel for

- Participants are most likely to mountaineer; hill walk; canoe/kayak; kite surf 10 miles or more from home.
- Participants are most likely to windsurf; canoe kayak; climb; gorge walk whilst on holiday in the UK.



'Where' continued...



"Where have you taken part in your main outdoor activity in the last 12 months?" Outdoor Participation Survey 2014

Geographical Spread

- Respondents to the Outdoor Participation Survey, '14 were from a wide geographical spread that broadly follows population density. Slight relative bias towards northern towns over London.
- The South Coast (16%) and South West (12%) remain the residential areas with the highest levels of participation in watersports activities (Watersport Survey, 2012/13).
- MENE data suggests:
 - Those living in the North East and South West take more regular visits to the outdoors. Those living in London and regions of high population tend to visit least frequently.
 - Frequent participants from BME, urban deprived, lower social economic groups, are more likely to participate in areas outside of London and West Midlands, particularly South West of England. This is likely to be due to them having access to higher quality of local infrastructure.

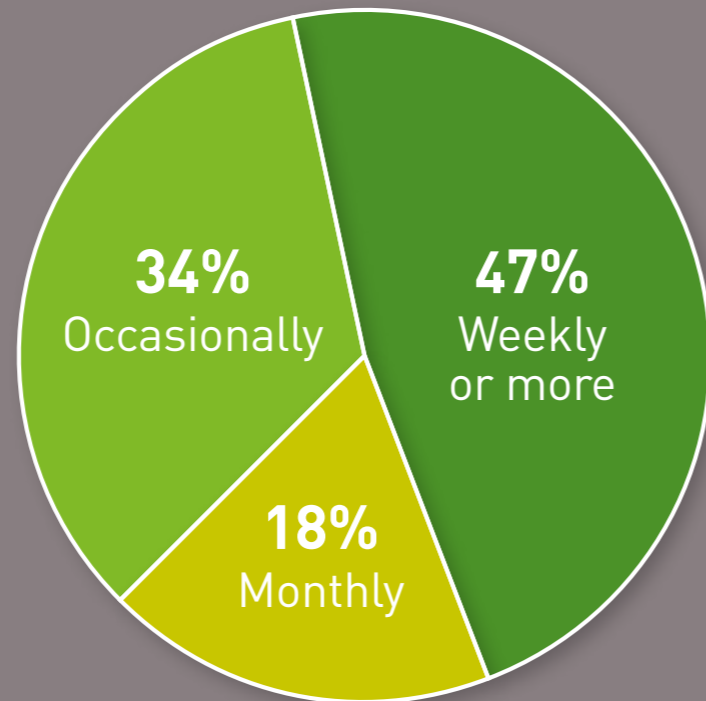
Outdoors Participant Profile

When

This section covers how often participants take part in outdoors activities and time of year.

Frequency

“At face value, evidence of correlations between life satisfaction, self-worth, happiness and lower levels of anxiety with the regularity with which a person visits the natural environment seem to be apparent. However, as the relationship is merely associative, whether frequency of visiting natural environments influences well-being or having higher well-being causes more natural environment visits, is unclear” (MENE, 2013/14).



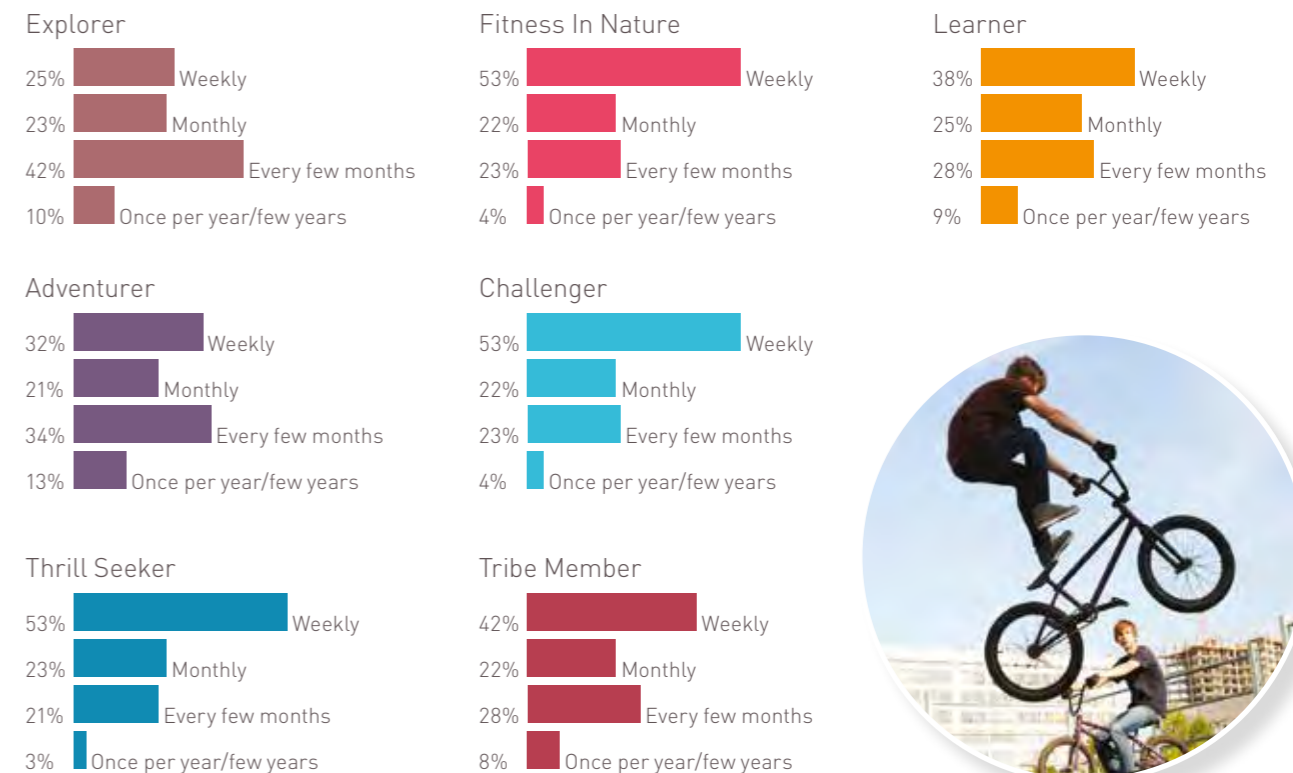
OUTDOOR
ACTIVITY
PARTICIPATION

When hooked, outdoors participants are committed

- 47% participate once per week or more; for approximately two hours and at vigorous intensity.
- According to MENE, of the 26.2m people who enjoy the outdoors, 50% took part in at least 30 minutes of physical activity at least three times a week, compared to just 20% of those who did not take visits.
- Challengers, Fitness in Nature and Freestylers are most likely to participate weekly. However, across all participant segments, Challengers make up the biggest proportion of weekly participants and Fitness in Nature and Explorers make up the biggest proportion of monthly and occasional participants.
- Highest number of 2x and 3x weekly participants are hill walkers and runners. 44% of all frequent walkers go for short hikes (Commercial Consumer Data Source, '14).
- Evidence suggests that participants in health referral exercise programmes based in outdoor green environments are more likely to continue with their programme than if it is based within a gym or leisure centre.



Frequency varies by motivation

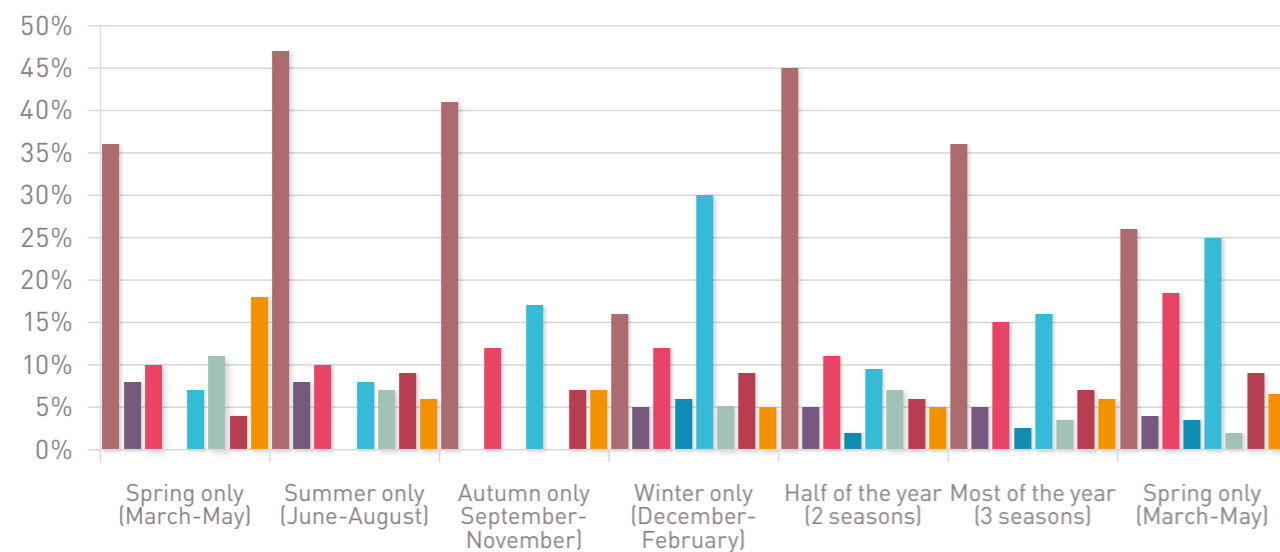


'How often do you participate' (Outdoor Participation Survey 2014)

Seasonal Participation

Participation in outdoors activities vary across the seasons

- Of all outdoors participants, 61% participate throughout the year and a further 16% participate most of the year (three seasons).
- Fitness in Nature are most likely to participate all year around/most of the year.
- 90% of those that hill walk/ramble/Nordic walk; 58% of those who do outdoor fitness classes; 58% of those who mountaineer do so throughout the year.
- 70% of those who do watersports; 46% of those who mountain bike; 46% of those who swim outdoors participate in the summer only.
- Of all watersports, angling is the activity that is most likely to be undertaken in the winter months and throughout the year (Watersports Participation Survey 2013).
- Participants are likely to swap their activity dependent on the season – skiing in the winter months and mountain biking across the other seasons.



"What time of year do you participate?" Outdoor Participation Survey 2014

- Explorer
- Adventurer
- Fitness in Nature
- Thrill Seeker
- Challenger
- Freestyler
- Tribe Member
- Learner

'When' continued...



Outdoors Participant Profile

What

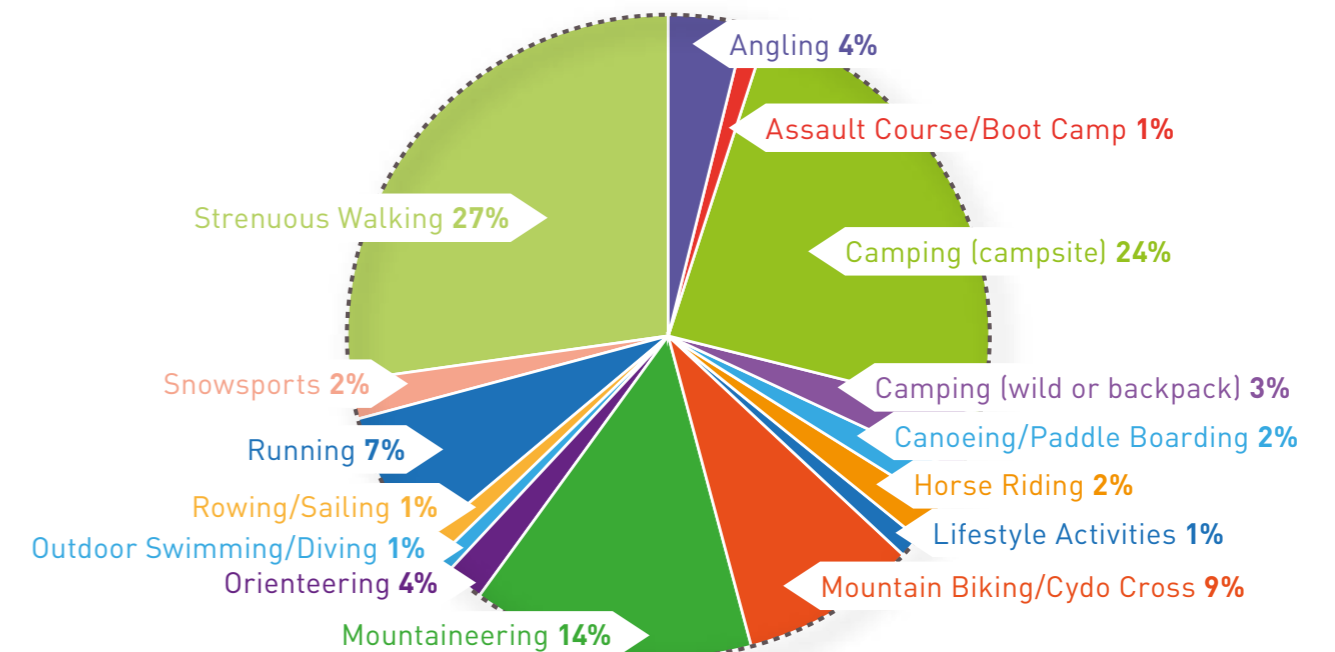
This section covers the range of outdoors activities participants access; looking at the common combinations of activities, trends and preferences. What the different participant segments want in terms of provision is also explored here.



The outdoors offers something for everyone

- On average outdoors participants participate in four outdoor activities.
- Of the 26.2 million people who enjoy the outdoors, walking is the most popular activity - 76% of all visits. 49% of all visits involved walking with a dog. 27% of all visits involved walking without a dog (MENE, 2013).
- 55% of dog walkers also hike (Commercial Consumer Data Source, '14).
- Outdoors participants are most likely to hill walk/ramble (27%). 66% of walkers have a preference towards short hikes. 79% of multi-day hikers also participate in day-long hikes (Commercial Consumer Data Source, '14).
- Swimming, road cycling and going to the gym are the main other activities enjoyed by all outdoors participants (Commercial Consumer Data Source, '14).
- The Watersports Participation Survey 2013 reports a 2.2% point decline in overall watersports activities. Only canoeing has increased participation.
- Out of the 93 million dayvisits for active pursuits/sports in 2012: 75 million were for long walks/hikes/rambles; nine million were for running and orienteering; nine million were for 'outdoor sports' (GB Day Visits 2012, Visit England).
- Walking/trekking holiday market is robust, but cycling, sailing and niche activity (gorge scrambling, paragliding etc.) holidays are seeing the greatest growth (Cumbria Tourism, Adventure Capital Strategy 2009-18).

Active Outdoors: 8.96m



Lifestyle Activities: Dragon Boating, Kite Surfing, Parkour, Skateboarding, Surfing, Windsurfing, Rafting, High Ropes, BMX
Mountaineering: Abseiling, Climbing, Mountaineering
Strenuous Walking: Gorge Walking, Strenuous Walking, Nordic Walking, Rambling

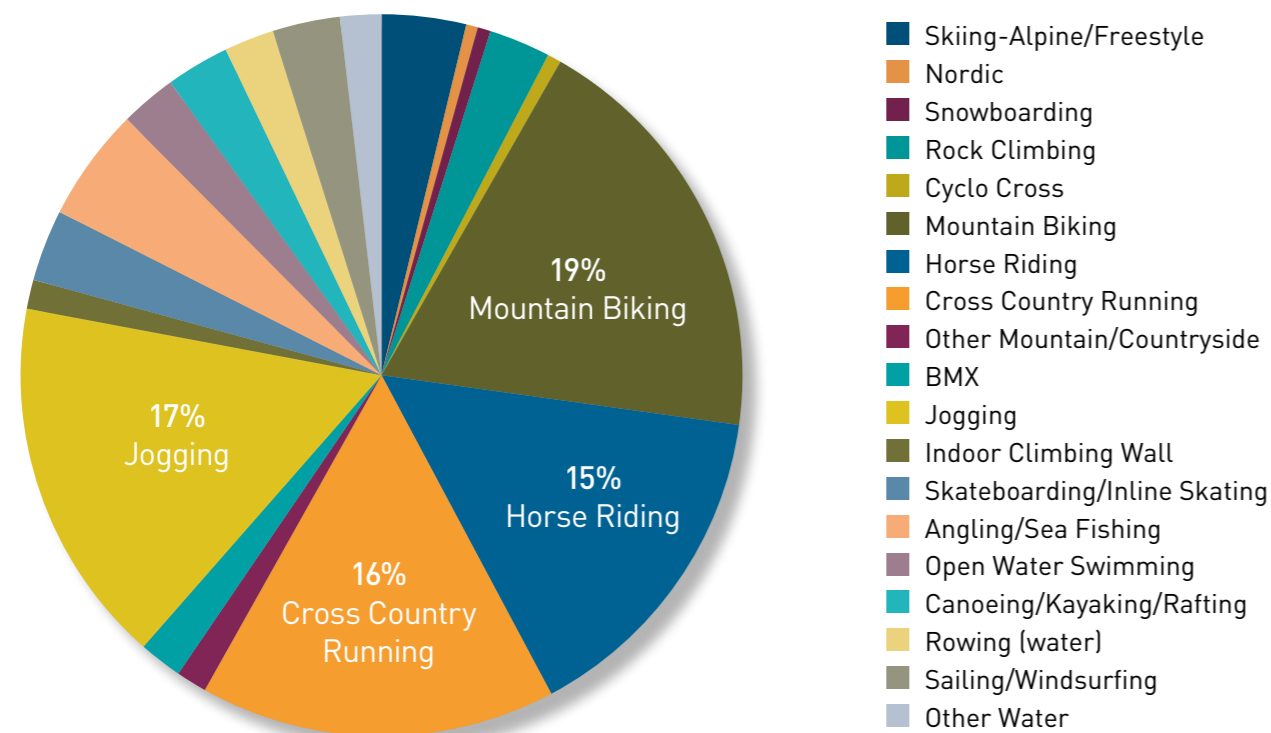
"Highlight the one activity that is the main outdoor activity you participate in?" Outdoor Participation Survey 2014

Regularly Active Outdoors

According to APS regular outdoors participation is broken down as follows:

Once a week participation in sport (30 minutes at moderate intensity), 14 years+. APS 8 - Oct 2013/14

Outdoors Activity	Number	Outdoors Activity	Number
Skiing-Alpine/Freestyle	84,100	Jogging	367,100
Nordic	11,600	Indoor Climbing Wall	28,900
Snowboarding	13,000	Skateboarding/Inline Skating	71,500
Rock Climbing	61,300	Angling/Sea Fishing	113,100
Cyclo Cross	13,700	Open Water Swimming	55,900
Mountain Biking	421,700	Canoeing/Kayaking/Rafting	63,100
Horse Riding	333,800	Rowing (water)	49,800
Cross Country Running	354,700	Sailing/Windsurfing	67,300
Other Mountain/Countryside	30,600	Other Water	41,000
BMX	43,200		



'What' continued...

Preference for outdoor fitness classes and challenge events

- Tough Mudder is rapidly growing, having engaged over 500,000 participants since its first event on 2 May 2010. The Tough Mudder philosophy on the company website is about overcoming challenges and helping team mates, rather than winning. The popularity of these events reveals a significant niche consumer segment and social demographic, seeking physically demanding endurance sports. Endurance events and obstacle courses of this nature may provide an alternative to conventional triathlon and marathon events.

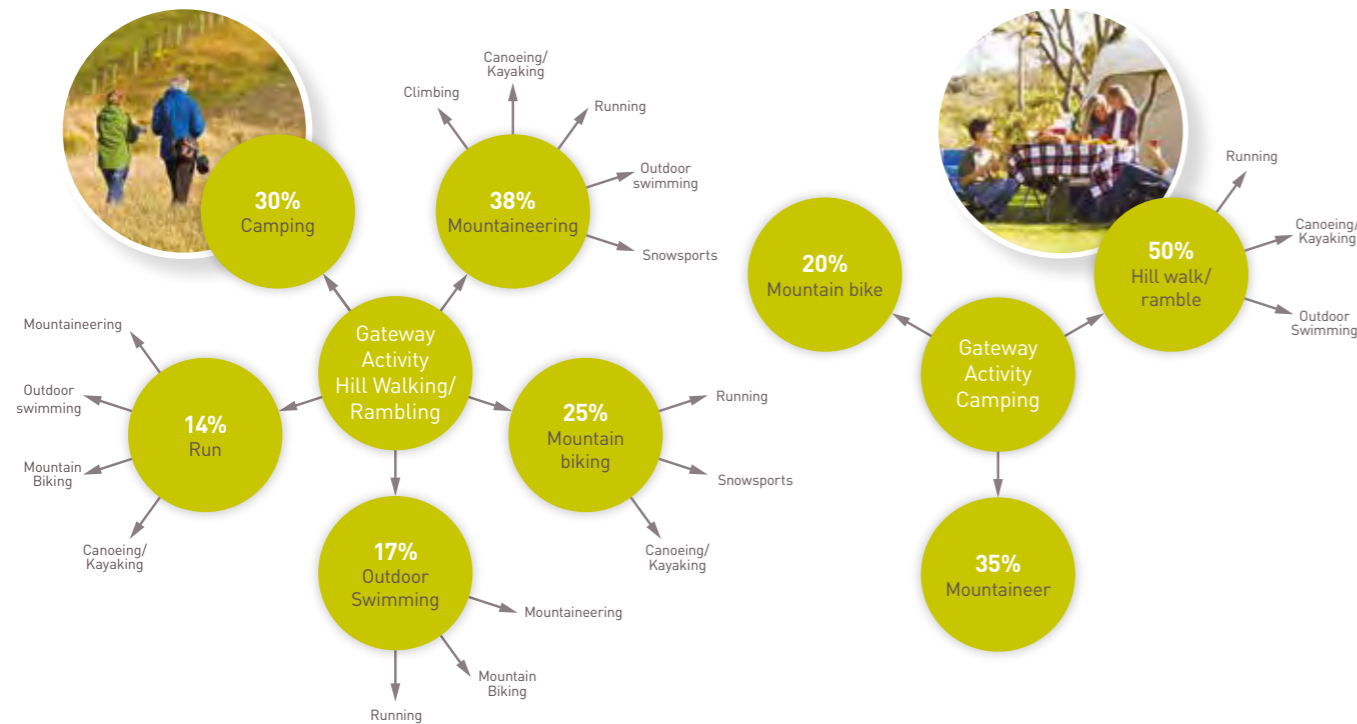
Activities most attractive to future participants include 'lifestyle sports', mountaineering and hill/strenuous walking

- 'Lifestyle Sports' (dragon boating; kite surfing; parkour; skateboarding; surfing; windsurfing; rafting; high ropes; bmx); mountaineering; hill/strenuous walking and canoeing are the most attractive activities to those that have not participated in the last 12 months but would like to participate in the future.
- Although participation figures are hard to establish for lifestyle sports due to the informal and counter-cultural context of the participation, the growth in nuance activities (e.g. paddle boarding; surfboarding, bodyboarding) is a positive indicator. Paddle Boarding participation is at its highest level, as is canoeing (Watersports Participation Survey 2013). Paddleboarding is the fastest growing activity in the USA (OIA USA, 2013).
- Mintel and Key Note statistics indicate that around 10% of the adult population is interested in participating in lifestyle sports, but this 10% is drawn from a narrow grouping (15-34 years; mainly men; single without children; living in affluent urban and suburbanites).
- Of the 6.5m people who go to the gym, 44% of them would prefer to exercise outdoors. This preference for 'outdoors fitness' has been reflected in the growth of leisure providers providing outdoors activity programmes and number of independent 'outdoor fitness' providers; in recent years there has been a proliferation of group exercise classes and personal training sessions being conducted within public spaces and most notably urban parks.



Combination of outdoor activities

- Walking, mountaineering and camping are the most popular, easily accessible, affordable and are entrance activities to other, less accessible activities.
- Hill walking/rambling is the most consistent activity across all ages.
- Of those that participate in a combination of outdoors activities, over 90% hill walk/ramble (Commercial Consumer Data Source, '14) and 90% go camping. These are known as gateway activities.
- Common combinations of activities with hill walking/rambling include:
 - 30% Camping
 - 38% Mountaineering
 - 14% Run
 - 17% Outdoor Swimming
 - 25% Mountain biking
- Common combinations of activities with camping include:
 - 20% Mountain bike
 - 50% Hill walk/ramble
 - 35% Mountaineer



For example: an outdoor participant who hill walks/rambles is also likely to mountaineer and do a combination of other activities such as climbing/running etc. The combination of activities is dependent on their motivations, see individual segments pages 120 to 127,

For example: an outdoor participant who camps is also likely to run and do a combination of other activities such as canoeing/outdoor swimming. The combination of activities is dependent on their motivations, see individual segments pages 120 to 127.

- Those doing a watersport do not participate in other watersports.
- Swimming is the most consistent 'other' activity across ages. Other common activities participated in frequently alongside outdoor activities include:
 - walking the dog
 - going to the gym
 - road cycling
 - playing cricket
 - photography.

'What' continued...

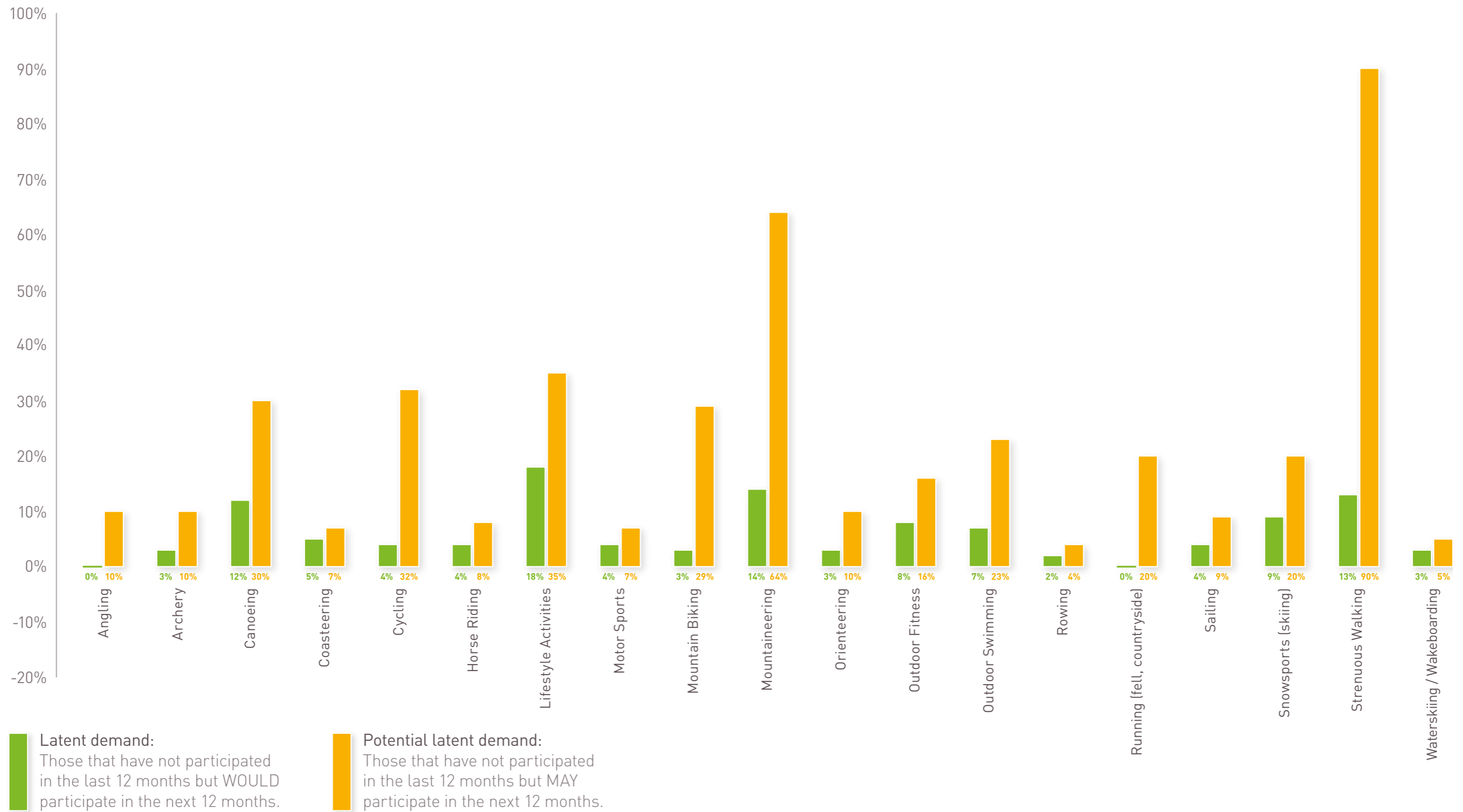
Take-up of activities varies considerably across segments

- Explorers are more likely to hill walk/ramble and participate in lower energy, 'softer' activities. 30% also combine swimming with outdoors participation (Commercial Consumer Data Source, '14). They are the group to participate in fewer activities, average combination of three activities.
- Adventurers are more likely to participate in higher energy, 'harder' activities such as mountaineering/climbing and mountain biking. 47% also combine their outdoors activities with the gym (Commercial Consumer Data Source, '14).
- Fitness in Nature are more likely to participate in easy access activities such as hill walking, trail/fell running and mountain biking.
- Thrill Seekers are more likely to participate in high energy adrenaline activities such as canoeing/kayaking (white water); mountain biking (red bull trail) and snow sports. Those looking for an 'adrenaline kick' participate in up to six activities.
- 43% of Explorers participate in Duke of Edinburgh (Commercial Consumer Data Source, '14).
- 60% of Explorers are members of National Trust (Commercial Consumer Data Source, '14).



Activities most attractive to potential future participants

This graph illustrates the future appeal of a range of activities as identified by those that are not currently participating outdoors but would/may in the next 12 months.



'What' continued...

"Thinking of the next 12 months would you like to participate in any of these outdoor activities?" Outdoor Participation Survey 2014

Type of activities vary considerably across age and life stages

High percentage of young people participate for functional and lifestyle reasons, not 'Sport'

Regardless of their motivations for participating outdoors, young people are attracted to activities that provide the following:

- Allow them to interact and spend quality time with friends - social occasion/ shared experience, creating memories. Activities are often spontaneous; simple to organise; appealing; accessible; in interesting settings.
- Activities such as lifestyle and extreme sports (e.g. roller-blading; skateboarding; windsurfing; surfing; sky diving; climbing; surfing, BMX; mountain biking; freestyle kayaking; extreme skiing and snowboarding) that offer a buzz or a tangible reward for their investment. These are activities that either ideologically or practically provide alternatives to mainstream sports and mainstream sport values.
- Connect to an established part of current repertoire e.g. shopping, drinking.



'What' continued...

More and more young people are looking for opportunities to personally develop

- Initiatives such as Duke of Edinburgh (DofE) and National Citizenship Scheme have experienced year on year growth.
- The main personal development benefits for DofE participants are in: realising their own capabilities; overcoming challenge; building resilience; developing perseverance; having fun; the chance to do something new; gaining independence; achieving what seems impossible.
- As a result of DofE:
 - 81% of young people feel that doing their DofE has made them more adventurous
 - 64% of young people said it allowed them to feel that they are better at sport or physical activity
 - 74% tried activities they would never have tried before
 - 69% of young people have new interests/hobbies
 - On average over 95% of those doing Duke of Edinburgh Bronze, Silver and Gold Expedition Awards participate in walking.



Expedition Awards 2013/14	Bronze %	Silver %	Gold %
Walking	98.9	96.5	91.4
Canoe/Kayak	0.51	6.31	2.49
Cycling	0.25	0.76	0.88
Wheelchair	0.05	0.05	0.03
Sailing	0.05	0.1	0.48
Rowing	0.04	0	0.07
Horse riding	0.03	0.07	0.18
Other	0.14	0.04	0.62

Quality family time

- Regardless of their motivations for participating outdoors (to explore; for an adventure; for fitness; for a challenge) families are attracted to activities that provide the following:
 - Easy to find out about and easily accessible (within 2 mile of home for regularity)
 - A place for a picnic ('squashed lunch')
 - Great facilities: clean; child friendly; good choice of food and drink (for lunch or tea and cakes as a treat at the end); easy access parking; good services
 - Value for money with family promotions or money back guarantees
 - Range of modern varied activities for all ages
 - Photo opportunities
 - Fits with parental working patterns and schedules
 - Short time enjoyed together is often more rewarding than a long day out.



'What' continued...

Older people choose more leisure-based activities

- A higher percentage of older people (55-65 years) hill walk/ramble.
- In general terms older people are attracted to activities that provide the following:
 - 'Keep fit' element but don't want to be pushed beyond their limits
 - Great facilities: clean, good choice of food and drink for lunch or tea and cakes as a treat at the end); easy access parking; good customer service
 - Easy to find out about
 - Well signposted routes and safe
 - Opportunities to 'stretch the mind'
 - Opportunities to meet like minded people.



Use of technology to enter, engage and experience the outdoors

- Over 70% of outdoors participants source information on their sport/ activity from the internet but relatively few visit outdoor websites. 35% access information through Facebook, friends and family only (Commercial Consumer Data Source, '14).
- Outdoor participants aged 18-24 years use technology to engage in outdoor recreation the most. 43% of these participants use Smart phones, accessing a wide range of information: maps/directions; opening times; ticket prices; places to eat; reviews/recommendations.
- Older people's access to and use of the internet is increasing (recent research from Ofcom shows that the proportion of 55-64 year olds using the internet on a mobile has increased from 5% to 27% since 2009) but is currently still likely to be dominated by practical activities rather than social ones.
- Google is usually the first port of call either a very general search or to find very specific type of activity, holiday or location.
- Engagement in specialist publications have limited reach, the National Trust magazine has the largest readership at 8% of all participants. 67% don't read any specialist publications (Commercial Consumer Data Source, '14).

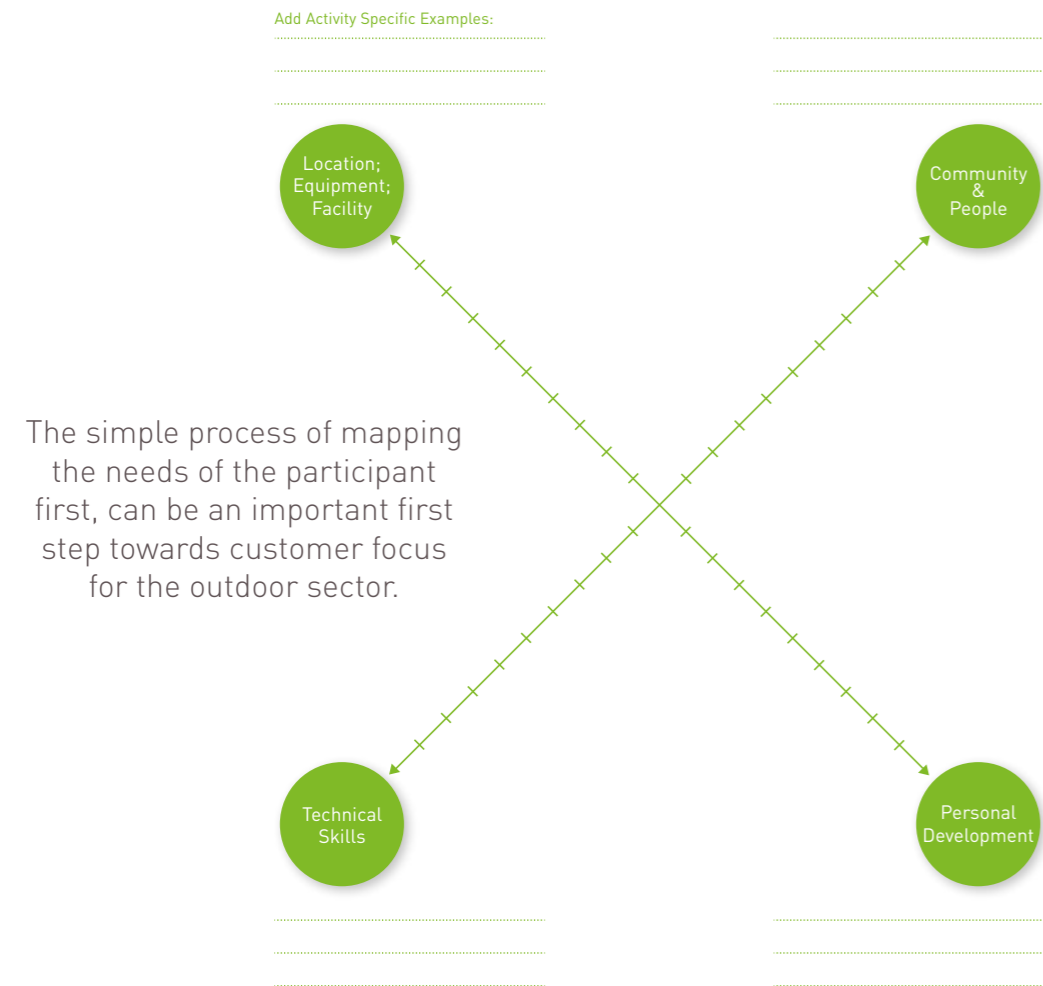


'What' continued...



What do participants want from providers?

Much of the participation in the sector is informal, yet people will regularly seek the services of an activity provider at many stages in their outdoor pathway. Hence, we can profile a balance of the following key ingredients, based on the priorities for each segment or individual participant:



How it works

The model can be adapted to the specific situation by outlining the key factors under each heading (see example above). This allows the user to adapt the model to profile target segments or individuals against provision.

Weight or prioritise key aspects of delivery as more important or significant than others, by using a simple (and relative) scoring system then map the provision.

It is then possible to overlay the understood requirements of the participant and see how closely they match.

The relative scale will not produce any objective results, but is likely to expose gaps or mismatch between supply and demand, and hence generate questions into why these gaps exist, and how they might be addressed.

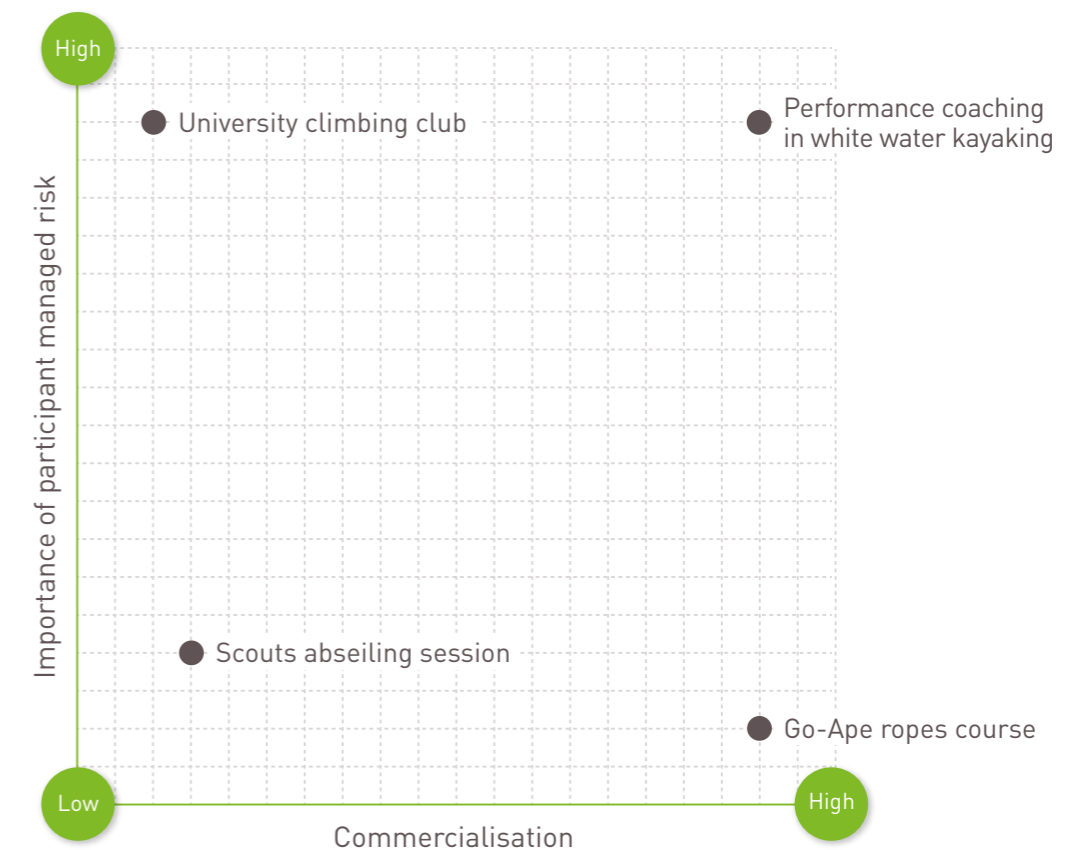
'What' continued...

Who wants to be in control

The risk paradox is a modern conundrum for the activity provider: participants wish to buy an essentially adventurous activity; yet they don't want it to go wrong.

Research (Dr Matt Barlow of Bangor University) profiling the differences between thrill seekers and outdoor learners shows that: for some participants risk is a barrier to participation; whilst for others it is the very raison d'être.

This explains the fundamental differences between climbing walls and ropes courses for example. Who manages the risk, and how, is mapped against the commercialisation to profile how the activity is delivered:



How it works

One axis shows how the risk is managed. This is not just a simple scale of how risky the activity might be, but who manages the risk and how.

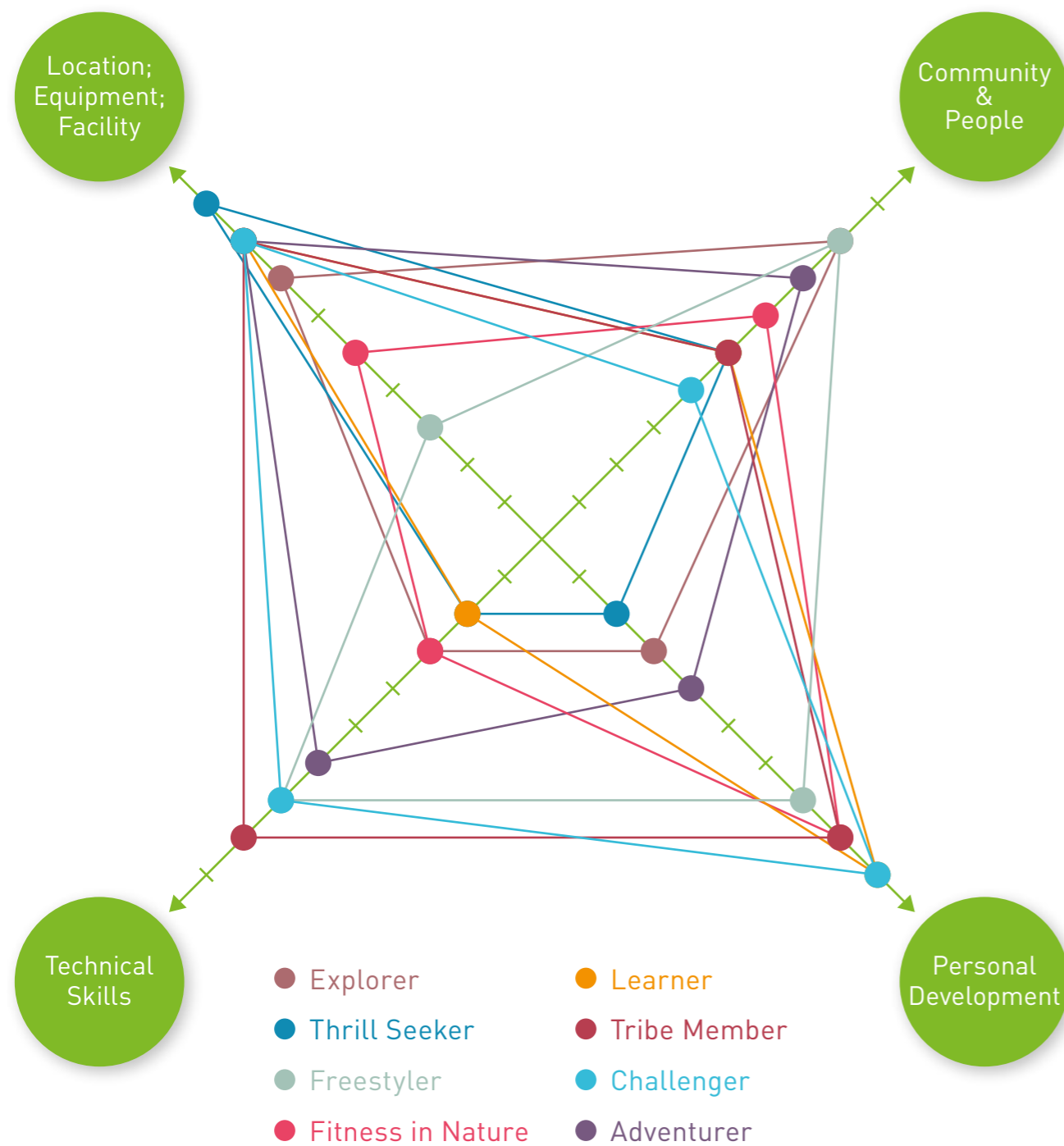
The second axis plots the level of commercialisation of the activity.

The examples illustrate how activities may vary dramatically: getting this right is essential for the motivation of participants.

How the profile varies across the segments

What different participant groups want from provision can vary dependent on their motivations. For the Freestyler for example the physical facility is of little importance to them whereas developing their skills and spending time with their friends is of high importance to them. Whereas for the Thrill Seeker the specific facility, location or equipment may be of high importance to them and developing their skills is of little importance to them.

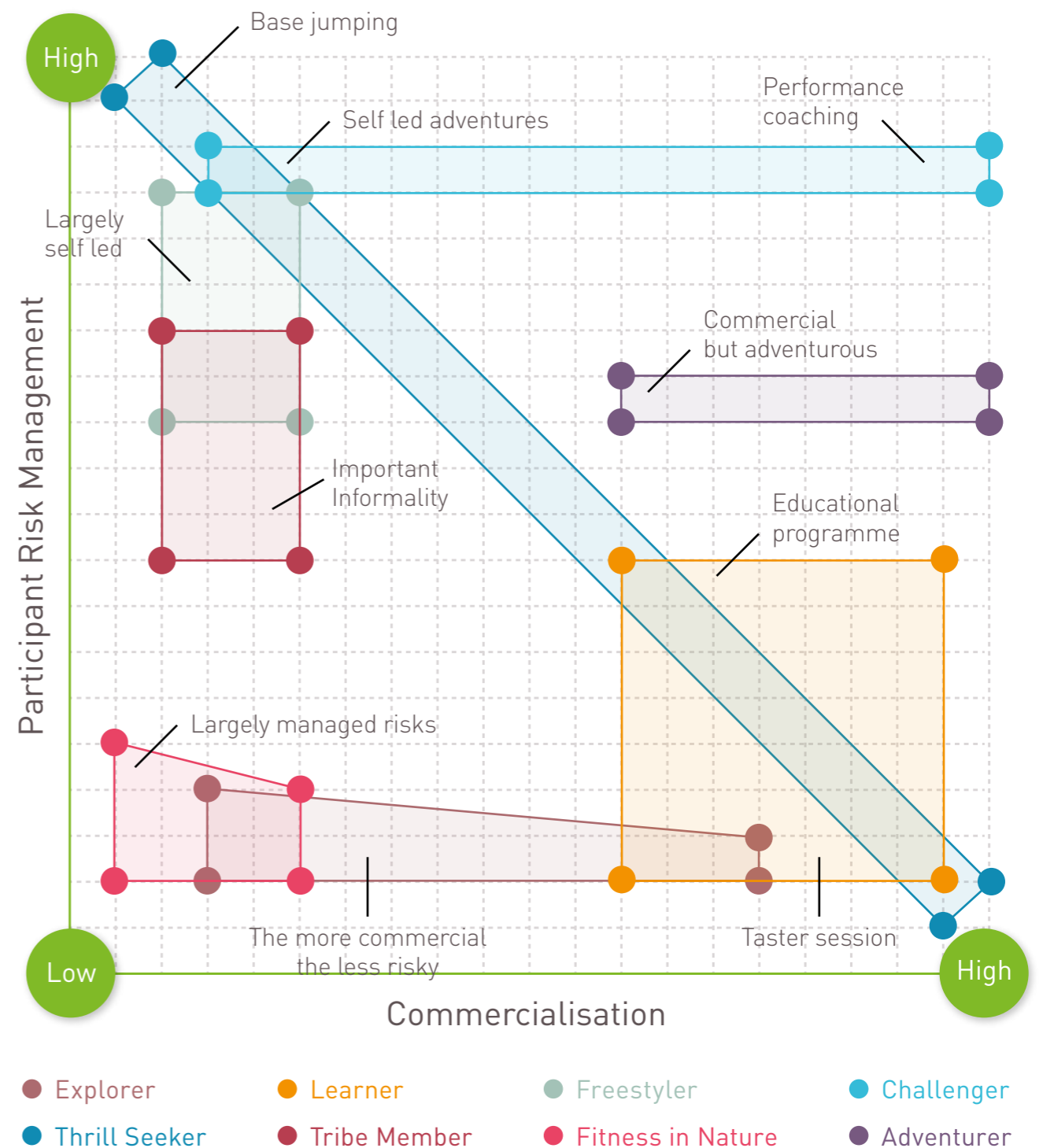
Whilst the specific requirements may vary for each situation, a general example for each segment may look like this:



'What' continued...

The level of risk management and commercial ratio varies by segment type influences

How much participants are looking to manage their risk and how much they want to pay for their participation/access commercialised provision varies. This can be mapped using the same 'activity profiling' tool as previously introduced.



OUTDOOR ACTIVITY PROVISION



This section provides insight into the breadth of organised provision of outdoors activities, but it must be acknowledged that much of the participation outdoors is unstructured and informal. This means that providing good information, easy access, promoting and sign-posting outdoor activities and opportunities is increasingly important. For example, on any given day on the summit of Snowdon, or walking in Dove Dale – only a tiny percentage of the enthusiastic and active participants will either be formally led, or be members of any club, organisation, or National Governing Body.

For those who do seek the services of an activity provider there is a baffling array of qualifications, registrations, associations and accreditations to navigate. In this section we aim to make sense of this variety by being respectful of the tradition; whilst understanding recent trends and evolution. In this manner we have been careful to portray the full spectrum of provision in the current climate, without regional, commercial or sporting bias.



Providing Outdoor Adventures in the Current Climate

The Outdoor Industry is steeped in tradition and nostalgia

Since the Golden Age of Alpinism in the 1850's, people have been employing the professional services of Mountain Guides: there is nothing new about outdoor activity providers.

Many people have misguided pre-conceptions of an industry based on ascents of Everest to their own residential school trips as a teenager; with very little in between.

Technology and marketing have brought access to adventures that used to happen 'over the hills and far away' into our own sitting rooms.

Increased leisure time, increasingly accessible travel, and the internet have brought access to the Outdoors closer and quicker than ever before.

Hence, alongside the traditional provision, the modern view of the outdoor sector is very different to the traditional stereotypes, e.g. Exeter – a city centre adventure hub:



Climbing Wall and surf shop round corner

Huge community footfall and events

Innovative climbing competition

Watersports shop selling trips and expeditions

Stand Up Paddleboarding

Bike and Canoe hire companies

The rate of growth, and therefore development has never been so fast. The outdoor sector is now a self contained industry with all the accreditation, regulation, professional standards and continued professional development one might expect in the modern era.

Yet the outdoor industry is currently in a state of flux, and traditional delivery models struggle to keep up with growth and change. Traditional sports have broken down into niche and nuance: mountain biking becomes downhill; single track; cross country; and enduro. Every discipline comes with its own products, philosophy, coaches, leaders and awards.

Hence the outdoor sector has not escaped the familiar long-chain model of increasingly niche providers marketing increasingly niche products via the internet. Now set against a backdrop of cuts to public funding, these complementary factors threaten the previous status quo, and have changed the balance of the outdoor sector food-chain forever.

Growing risk aversion in society has led to increased requirements for regulation and professionalism of the industry. Yet for many participants, the chance to manage that risk is the very appeal of outdoor sports. Balancing risk-management against adventure is a very modern paradox for the outdoor provider.

These developments all add up to paint a picture of a rapidly evolving industry, and this part of the report attempts to portray the current issues and diversity for all the various types of providers.

Numerous recent reports outline the scale and economic value of the outdoor sector. Due to the complexity, diversity and rate of change, few reports have included an accurate and current assessment of the outdoor provider landscape. Given the variation by region, environment, sport and objective, most views of outdoor providers are either incomplete or historical.

In order to give a comprehensive and up to date account of the current provision of outdoor activities, this section of the report is split into four key stages:

1. **Who delivers outdoor activity?** Desk based research listed almost four times the expected number of activity providers, compared to previous industry estimations. Whilst still incomplete, this is the most comprehensive record to date, and highlights the potential for completing this project in the future.
2. **Understanding the complex provider landscape.** It is important to understand the key families of provider types segmented by purpose. Four families of provider types rely on a symbiotic relationship. The report gives a sense of relative scale and proportion to these key segments.
3. **Profiling Activity Provision.** Understanding the activity provider relationship. Whilst there are several families of provider, they both rely on each other, and impact on each other in equal measure.
4. **Provider Families.** To fully understand the market place, this section of the report concludes with a profile of each provider family, outlining the delivery patterns, key trends and current issues with each type of provider.

Who Delivers Outdoor Activity

Desk based research has identified a complex provider landscape of nearly 9,600 activity providers, ranging from sole traders to large organisations; informal clubs to regulated commercial facilities.

The industry is therefore significantly larger and more complex than previously reported.

Despite numerous attempts to register and accredit these providers, there remains no definitive list, and no single register contains more than one third of the providers identified here.

Before attempting to make sense of this baffling cloud of provision, it is important to recognise the challenges this represents to the consumer, and all who try to engage with the sector from outside.

The Adventurous Activities Licensing Authority registers only the commercial provision of a limited number of outdoor activities for minors. Whilst this register was an ideal starting point for the research, this criteria potentially excludes activity that is non-commercial or for consenting adults.

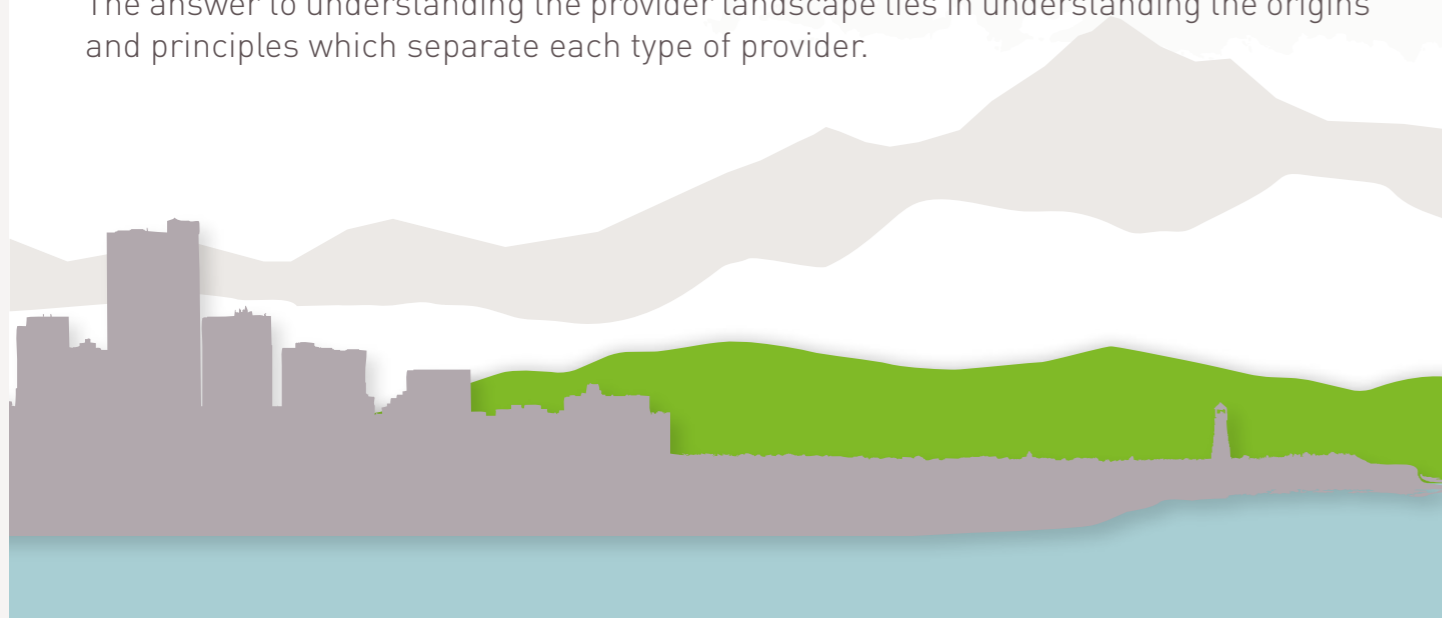
There are numerous accreditations like the AdventureMark and Learning Outside the Classroom quality badge for different purposes. The baffling array of accreditation schemes and awards does nothing to help the consumer understand the market.

Attempts (mostly by trade associations) to classify activity by delivery model or activity type are futile as the vast majority of providers rely on a mixed economy of both residential and non-residential activities.

Furthermore, reliant on a seasonal and multi skilled workforce to deliver a variety of sports and activities there is wide spread duplication in reporting providers.

It is not possible to make generalisations or segment activity by region or location. A single sport like canoeing, for example, might take place in a local pool, an urban canal, off the coast, or on the higher rivers and lakes of the National Parks.

The answer to understanding the provider landscape lies in understanding the origins and principles which separate each type of provider.



NGB Development Programmes

National & Regional centres of excellence

Sport Specific Clubs

Adventure Travel Companies

Specialist Activity Centres

Independent Traders:

Sole traders Co-operatives Second Income

Multi Activity Centres:

Youth Services Independent Affiliated Disability
Development Centres Development Travel Activity Holidays

Education Authority Centres

Event Management

Booking Agencies

Independent Nature Education

Adventure facilities (Local Authority)

Uniformed Youth Groups

Adventure Clubs

Destination Providers

Retail Outlets

Schools & Education

Leisure Operators

Adventure facilities (Commercial)

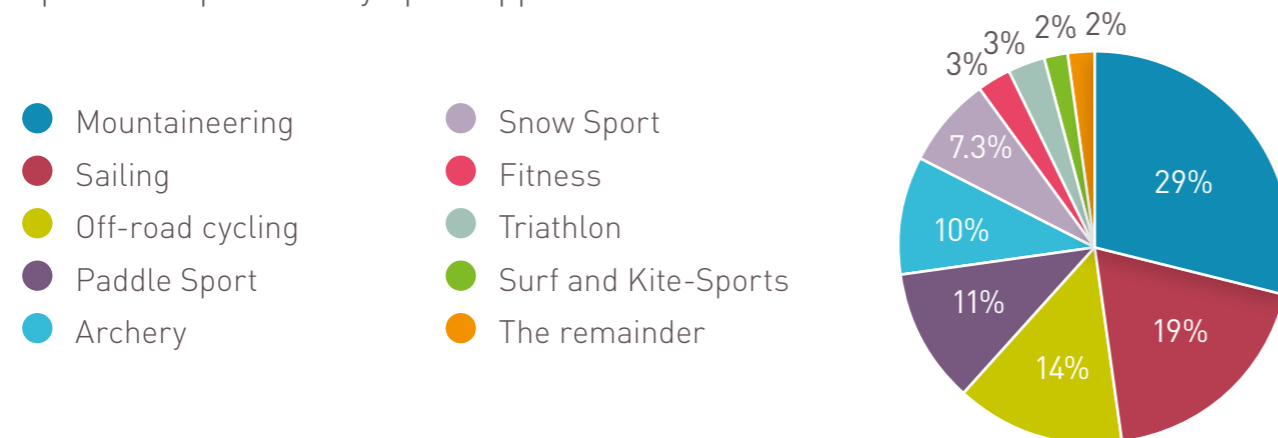
Health and Social Welfare

Adventure Fitness Providers



Understanding the Complex Provider Landscape

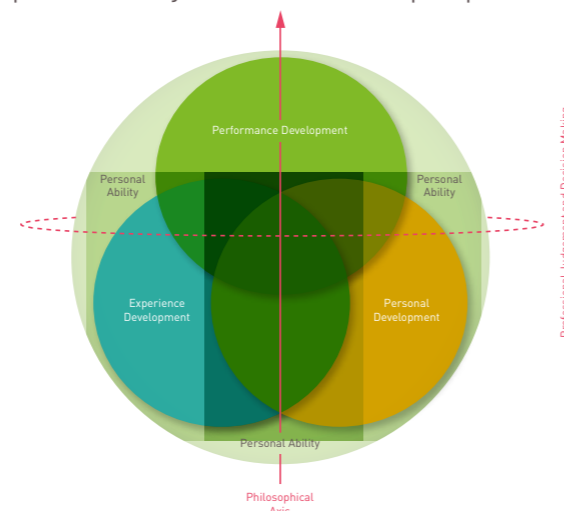
In order to understand the provider landscape, it is important to consider 'what' they provide, and for what purpose. National Governing Body registers, where available, record over 104,000 qualified coaches, instructors and leaders in their sports. Proportions by sport appear thus:



Many provider organisations employ numerous staff (from one to hundreds) hence there are many less providers than individuals. Seasonality and a mixed economy of activity ensures that most individuals will be qualified in numerous activities. Many freelance staff will work for a number of provider organisations. Voluntary leaders and club coaches may not feature on professional registers, or equate to full time personnel in terms of delivery hours.

These 104,000 individual qualifications are delivered through 9,600 activity providers. Hence, segmenting and measuring the sector by sport is of interest (in terms of scale and proportion) but largely irrelevant. Considering the role of these individuals is essential in helping us to understand how the delivery varies from one provider to another:

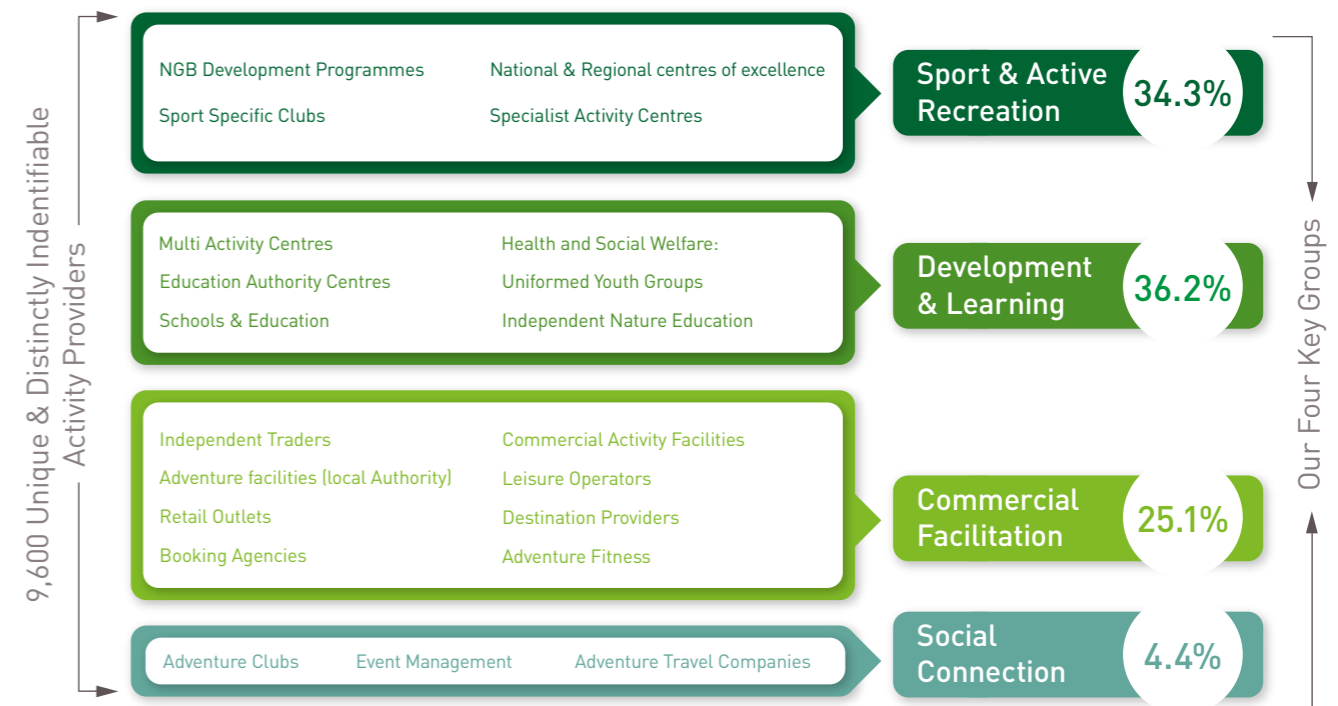
Recent research in Adventure Sports Coaching (Dr Loel Collins and the University of Central Lancashire) demonstrates how each provider operates across a range of delivery styles. This University of Central Lancashire (UCLan) model demonstrates the relationship between coaching, instructing and guiding – and how a provider may deliver a blend of all three. The model works equally well for segmenting the adventure sports provider by fundamental purpose.



The four key families of providers

By adding social connection to the UCLan model (p96) we can identify four key areas of delivery: developing the individual; developing sport specific skills; facilitation of outdoor experience; and connecting like minded participants.

Whilst most providers will deliver a mixed offering of the above; their origins and heritage will often reveal their fundamental ethos or governance model. The providers can then be more easily divided by primary philosophy into four key families:



A breakdown of providers by type gives us the following proportions:

Percentage of providers	Ratio of participants to providers
34.3%	LOW
36.2%	HIGH
25.1%	MEDIUM
4.4%	MEDIUM

Understanding the Activity Provider Relationship

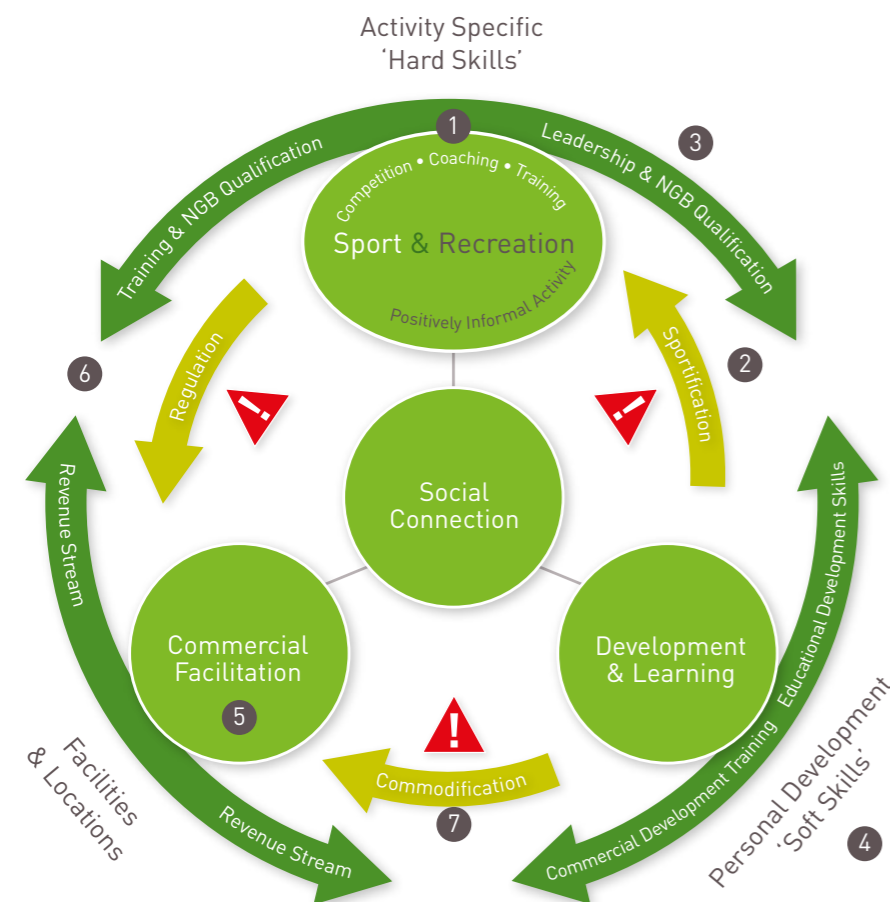
Having identified that there are four key families of provider, it is important to understand their relationship in order to fully understand what is delivered, how it is delivered (and why) and where the opportunities might exist in the future.

Many providers base their view of the industry on their own personal view as a long term participant.

Whilst many knowledgeable industry experts can be found throughout the sector, the more deeply experienced or specialised they are in their specific domain, the less likely they are to understand or relate to providers from a different family.

In addition, they are less likely to understand the motivations of participants who differ from their own. For these reasons, the outdoor sector struggles to be customer focussed.

The provider relationship:



But these four families of providers are more complementary than separate, and reply on a symbiotic relationship in order to function:

- 1 Sport and recreation are two sides of the same coin. Recreation provides an opportunity for informal, club-led apprenticeship in the outdoors. There is no court or pitch; no team or referee. These apparently un-regulated sports have strong self-regulating ethical codes. Competitive sport and recreation co-exist in many outdoor sports (cycling and canoeing).
- 2 Whilst 'sportification' is often seen as a threat to traditional recreation, the healthy transfer of coaching and training expertise into recreational sport in order to further push the boundaries of frontier adventure is nothing new.
- 3 The National Governing Bodies 'Train the Trainer', administer and develop the outdoor industry qualifications. Qualifications, based on military leadership models, include high domain specific skills and experience; yet contain little facilitation and development skills.
- 4 Educational organisations, such as the Institute for Outdoor Learning and the Council for Learning outside the Classroom, enhance the educational and developmental value of outdoor activity, beyond sporting skill and leadership. When combined with the English Outdoor Council and numerous forest schools initiatives, there has been a trend to re-engagement with nature.
- 5 Whilst the commercial providers are often seen as a threat to the traditional and recreational pursuits, many providers now rely on a mixed economy of commercial activity to financially support their sporting or developmental programmes.
- 6 Many commercial providers deploy less experienced (and cheaper) staff. Risk is often seen as a barrier (rather than an essential essence) and is likely to be engineered out of the equation in an industrial model.
- 7 These providers may see the activity as a commodity, and may not have been passionate participants themselves. As a consequence it is now possible to make a career of the outdoor sector, and we have seen a growth of professional trade associations and a culture of continuing professional development.

To understand how these different provider types co-exist, consider an activity like abseiling. This can be sold as a commercial or group activity; taught as a mountaineering skill; and used as a vehicle for personal development. With one activity having numerous forms, this represents a challenge for consumer, provider and governance alike.

Provider Family: Sport and Active Recreation

The primary reason for the provision is participation in, and development of, the specific sport or activity for the good of the sport as well as the individual's performance.

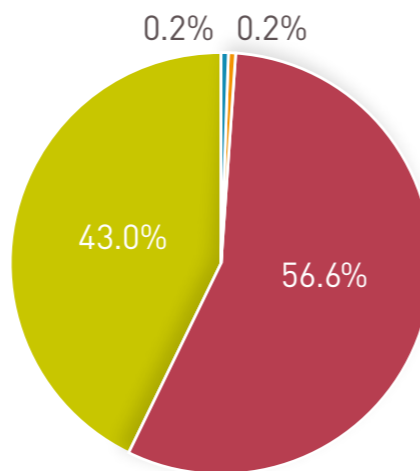
Providers may deliver more than one sport at a centre or through the year, but participants demand high sport specific expertise from them.

Many of these providers see themselves as the custodians of the sporting code and ethics.

These providers are built on a sporting model or doctrine, with performance coaching (by any other name) at their core.

The responsibility for the management of risk lies with the skilled participant, and this is an essential factor of participation.

- National/Regional Sports Centres
- National Governing Body (or County Sports Partnership) Development programme
- Specialist Activity Centres
- Sport Specific Clubs



• National/Regional Sports Centres

Usually public sector centres that primarily focus on supporting the strategic aims of key National Governing Bodies, in one or more sport. These centres usually receive funding from their National Sports Council (often via NGB Whole Sport Plans) to develop sport/activity in their home nation or region.

• National Governing Body (or County Sports Partnership) Development programmes.

Targeted activity development programmes and initiatives, when delivered specifically by the NGB or CSP development officers.

• Sport Specific Clubs

Includes NGB affiliated clubs with a particular sporting aim. Especially likely to contain the competitive aspect of otherwise recreational sports (sprint or slalom kayak clubs; ski racing clubs).

• Specialist Activity Centres

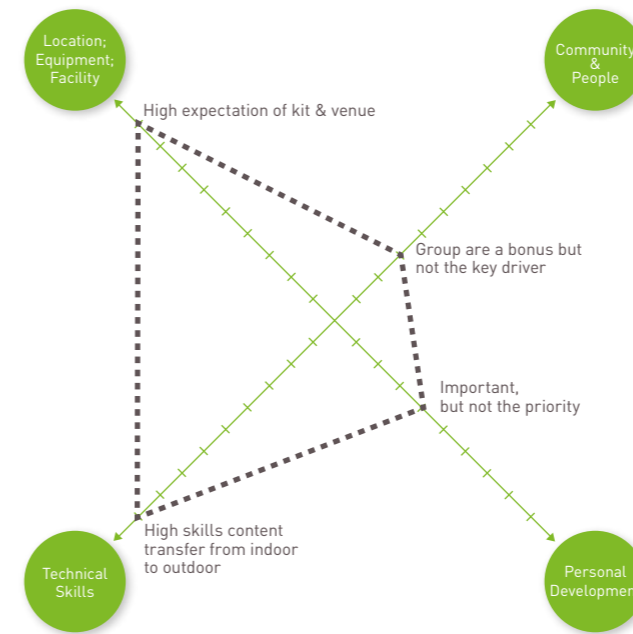
These are providers who deliver skills training in specific sports and activities. They range from individual coaches to large centres and include sport specific schools, academies and training centres.

Provider Workforce

Most of the instructors, coaches and leaders in this segment are driven by their own particular passion for sport. It is rare to be able to make a career from a single sport, so they are usually multi-skilled and qualified in a number of activities (but may have a strong preference or specialisation).

Issues and Challenges

In general, providers assume that participants will be motivated in the same way, and hence deliver products and services that would appeal to themselves. This segment struggles more than most to be truly customer focussed, and are largely unaware



BMC Ready To Rock Course at Plas y Brenin

that this is an issue.

The more highly specialised and high risk the activity, the more expensive the provider and the lower the ratio.

Many highly skilled sports people are coming under increasing pressure to be qualified and regulated as coaches.

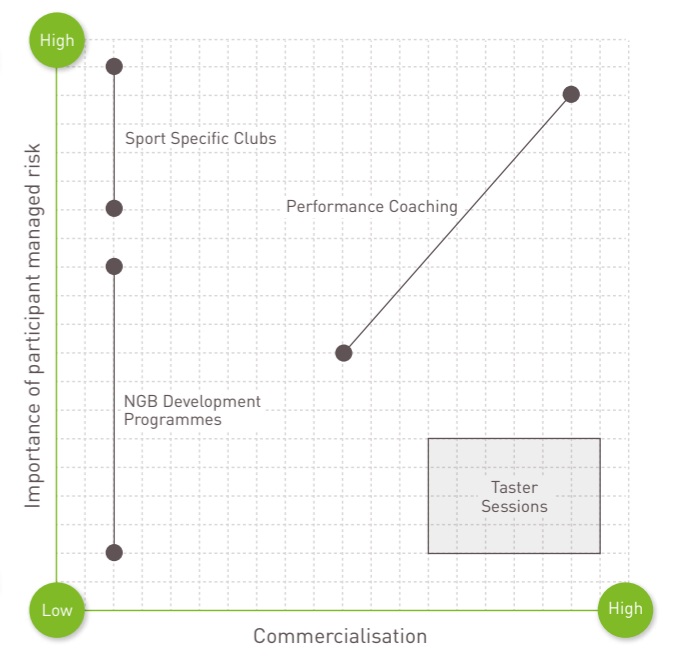
Trends

There is a growth in demand for tailored sports coaching.

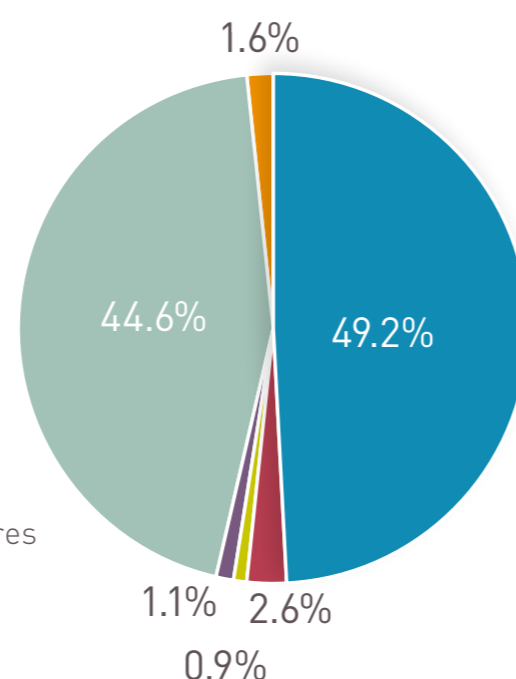
There is a divided economy (the rich are still rich, the middle class are now less likely to afford such high quality provision).

Prime Example

The British Mountaineering Council has teamed up with Plas y Brenin, the National Mountain Centre, to deliver 'ready to rock' climbing courses. These are specifically designed to help climbers progress from indoor walls to climbing outside on real rock.



Provider Family: Personal Development & Learning



- Multi Activity Centres (including sub-sets)
- Local Education Authority Outdoor Education Centres
- Health and Social Welfare Provider
- Nature Education
- Educational Establishments
- Uniformed Youth Groups

The primary reason for the activity is the development and learning for the individual participant.

The specific choice of activity is secondary, being the vehicle for achieving the primary developmental aims.

The majority of providers deliver a variety of sports or activities as a consequence. Most of these providers are built on an educational model or doctrine, with activity leadership at the core.

Realistic management of the risk is often an essential learning ingredient of the activity.

Much of the provision in this segment is sold B2B (youth development schemes, management training, educational visits, etc). Many individuals will still engage in developmental trips and schemes (Raleigh International and DofE awards, etc) on an individual basis.

• Multi Activity Centres

- Activity Holiday Companies with residential centres offering a multi activity holiday as part of a larger organisation or chain
- Independent Activity Centres are usually smaller, offering a range of activities on both a residential or non-residential basis
- Development Centres: these are a sub-set of multi activity centres that use the activities primarily for personal development. This may be rehabilitative, remedial, or proactive in the case of development and management training
- Disability Specific Centres: these could be a separate category, but given that many disabled guests come with carers, families and friends, it is perhaps better seen as a sub-set of development centres
- Youth Services and Not in Employment Education or Training (NEET) schemes for personal development
- Affiliated Centres: These are the centres that are connected to a larger organisation – such as YHA activity centres
- Development Travel Companies like Raleigh International will have centres overseas, others even operate on boats as a centre.

• Local Education Authority Outdoor Education Centres

Whilst many centres originated as local authority provisions, there are now many providers who are committed to the values of outdoor education but who are independent. A significant percentage are still owned and run by LEAs, primarily for the provision of outdoor education to young people from that Local Authority. Many of these are now traded services, charitable trusts or outsourced to third parties.

• Health and Social Welfare Providers

From GP referrals to Slimming World – these are organised activities that are only available through an agenda for health.

• Nature Education

From Field Studies Council to conservation groups like the National Trust, and Guided RSPB walks to small providers of Bushcraft and natural engagement courses. Primarily to enable people to experience, explore and understand the environment.

- **Educational Establishments**

From the single driven teacher in a state school, to schools that employ dedicated heads of outdoor education, through to university courses.

- **Uniformed Youth Groups**

Includes all the classics like Scouts and Guides, as well as smaller organisations like the sea-cadets and surf life-saving clubs. Separated from clubs by being a chain or part of a larger organisation.

- **Provider Workforce**

Traditionally, education centres would have been staffed by experienced teachers, with NGB qualifications in a range of outdoor activities. Funding cuts have reduced their use of 'expensive' teachers and more qualified staff, preferring less qualified and hence 'cheaper' staff. This drive for efficiency has led to greater reliance on the seasonal and freelance market. Seasonal outdoor centres rely heavily on the gap year employee, often trained and assessed in-house.

Issues and Challenges

Driven by cuts in public funding, the commercialisation and professionalism of the industry has had significant impact on the quality and long term impact of provision.

- Commercial providers have moved to less adventurous activities that operate at more favourable ratios and deliver greater returns
- The industry demands NGB qualifications, yet these command more pay and can lead to poor staff retention, so employers are reluctant to invest
- New coaching awards fail to address the needs of development and learning providers
- Research suggests that a drop in quality will result in a drop in sustained participation.

Current reliance on quantitative rather than qualitative measures do not reflect the true impact of 'The Cinderella Sector'.

There are numerous reports and anecdotal records of the life changing benefits and impact of outdoor participation, yet the sector is largely un-recognised as a driver for a healthy habit for life.

It is difficult for a sector to prove value within current (e.g. 'single sport') measures, when sport for sport's sake is rarely the primary motivation.

Genuine success in sustaining life-long participation in outdoor activity would not look like success under the existing measurement system.

Trends

There is a resurgence in corporate development training, with customers prepared to pay for high quality and good value.

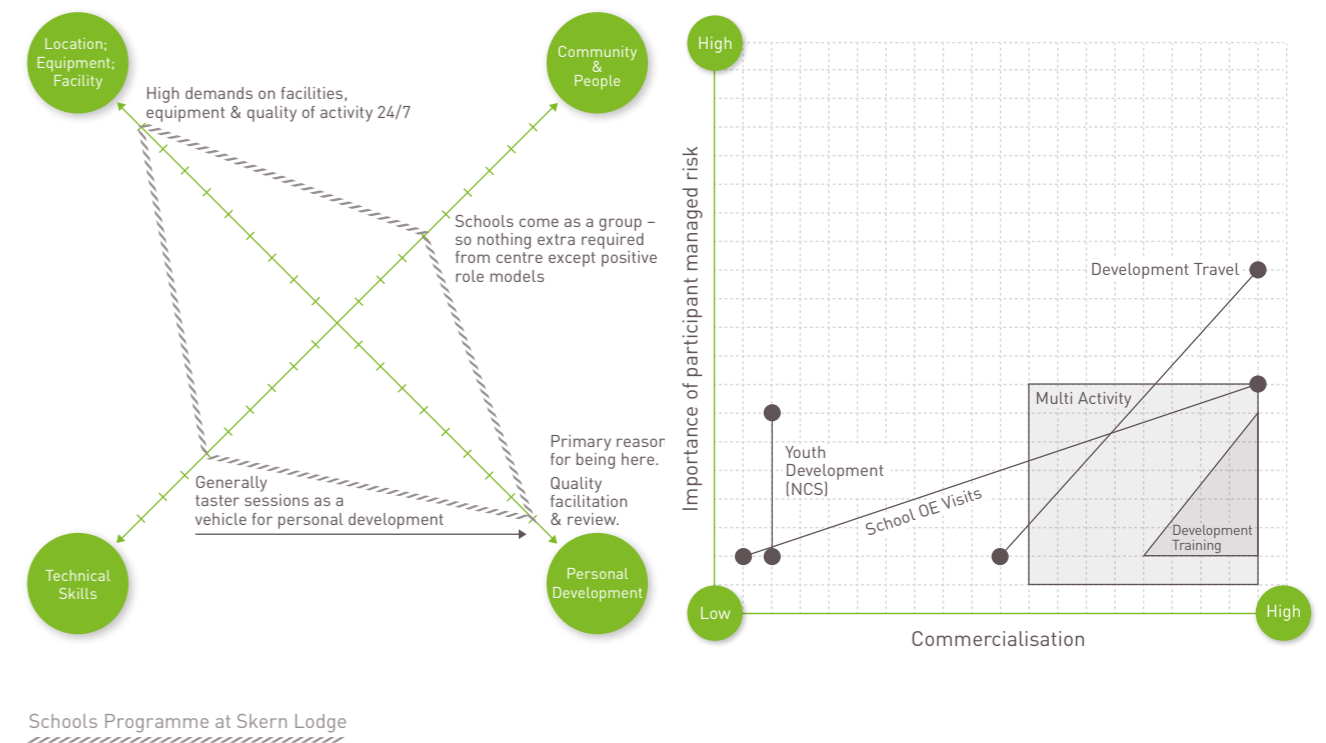
Funding cuts in education (and younger students) result in less adventurous educational visits.

A recent survey by the English Outdoor Council revealed that, of 152 Local Authority centres, 26% faced closure; 39% were at risk, and only 35% were currently secure.

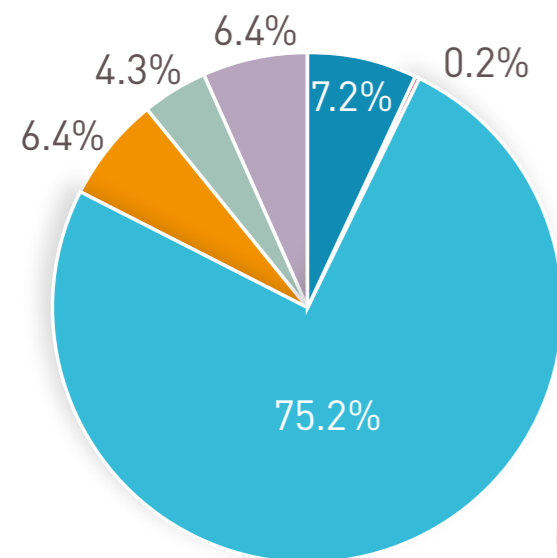
Measuring outputs in terms of quantitative data, rather than outcomes in terms of qualitative impact, may result in consumers who want a developmental experience, receiving a cheaper commodity. See previous abseiling example.

Prime Example:

Skern Lodge has managed to grow and repeatedly re-invest in the business throughout the recession. John Watson says the secret was in training the Customer Service team "All we had to do was to realise that the customer could come when they wanted, but they would have to pay a premium. They were prepared to do that".



Provider Family: Commercial Facilitation



- Leisure Operators
- Adventure Fitness Providers
- Retail Outlets
- Booking Agencies/Activity Bureau
- Independent Traders
- Commercial Activity Facilities
- Destination Providers
- Adventure Facilities



The primary reason for the provision is commercial delivery of facilities and equipment; often the opportunity to try a new experience or activity.

The sporting or personal development of the participant is secondary, and these activities are often categorised by the use of purpose built facilities, where the barriers of risk are managed or removed by the activity provider, not by the skills and/or learning of the participant.

These providers are often founded on a commercial or industrial model.

• Leisure Operators

Private and public sector leisure centres offering a gateway to adventure sports. For example: kayaking in swimming pools, and/or indoor climbing and traverse walls etc.

• Adventure Fitness

Independent providers of adventure fitness and boot-camp style exercise and health classes.

• Retail Outlets

Outdoor shops with 'come and try it' or product testing facilities.

• Booking agencies/activity bureaux

Shop fronts by location or web. Very common on the continent, but rare (yet growing) sector in the UK.

• Independent traders

- Sole traders: the independent guides, coaches and leaders. AKA the 'man and a van and a website'
- Secondary Income: a growing sub-set of the above, who have an alternative income and do a bit of outdoor work 'on the side' often as valuable skilled volunteers
- Co-operatives: groups or consortiums of the above, who team together to share the cost of marketing and administration.

• Commercial Activity Facilities

Pay to enter, purpose built facilities. Typically privately funded and offering non-residential participation in a particular activity. These centres may be focussed on marketing a narrow band of skills development in that activity: from beginner to expert.

• Destination Providers

Locations containing natural facilities. Simple provision of the venue in which the activity takes place – often free and unregulated.

• Adventure Facilities

Free to access, purpose built yet simple non-commercial facility provision, usually unregulated. A hint of outdoor sport provision amongst other activities, and often in an urban setting, including: Local Authority owned and purpose built facilities for parkour/bike tracks/fitness courses etc.

Provider Workforce

This is a commercial job of work, and these activators and facilitators are the least likely to have a deep involvement with the activity as a participant.

The exception is single sport or activity providers: driven by an individual's desire to fund their own participation or lifestyle.

Due to the repetitive and entry level nature of the work, there is a high turnover of relatively unskilled labour.

Issues and Challenges

This is an increasingly competitive and maturing market. Margins are quite low, so there is pressure to deliver high participation.

These providers may have the greatest potential to influence new comers to activity and sign-post accordingly.

Ever increasing insurance costs and pressure to be qualified (and regulated) are a challenge to this segment.

Trends

There is a growth in micro and local urban adventure activities.

Climbing walls are becoming more mainstream and seen as an attractive alternative to gyms. A recent Leisure-net report on Outdoor Fitness reports that over 50% of providers have seen growth of over 50% in the previous 12 months, and 44% of survey respondents would prefer to exercise outdoors.

Purpose built facilities can be less threatening to the risk averse e.g. white water rafting at Lee Valley slalom course.

The public have ever increasing expectations of high professional standards from leisure facilities and accommodation.

Prime Example

Kayaking London have combined innovative marketing strategies for themed events; with purpose built equipment; in order to facilitate novice kayakers safely enjoying an adventurous journey on the tidal Thames.

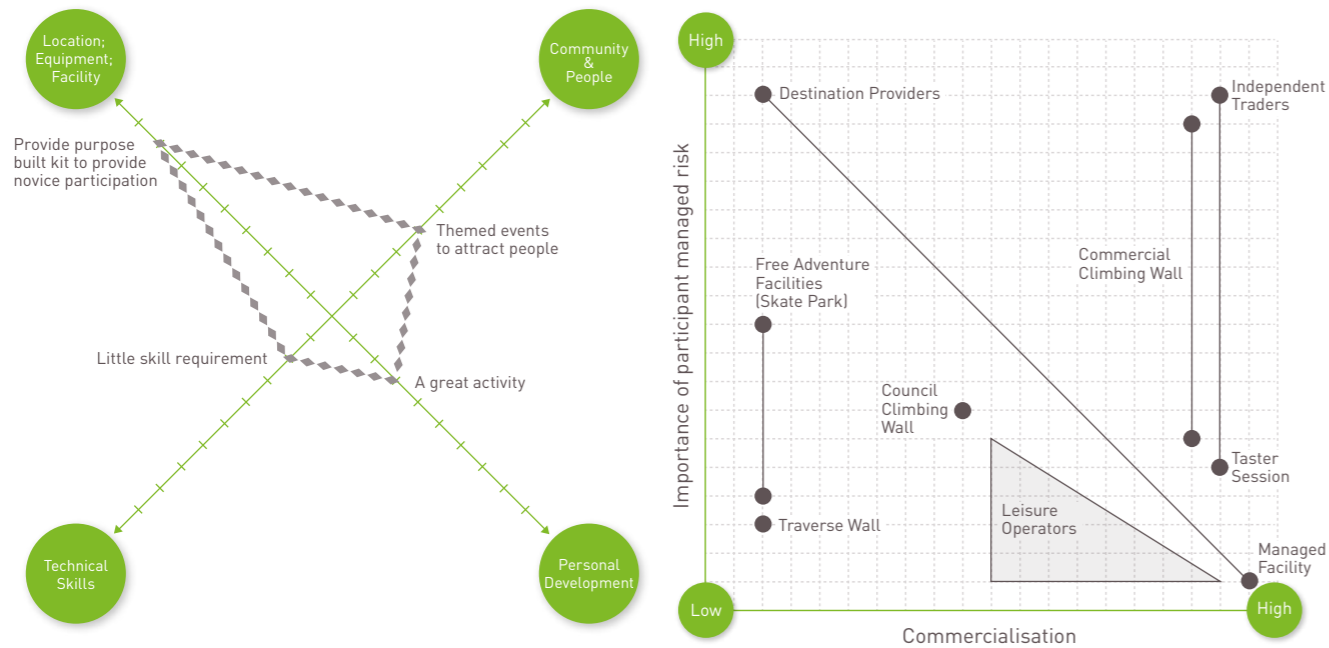
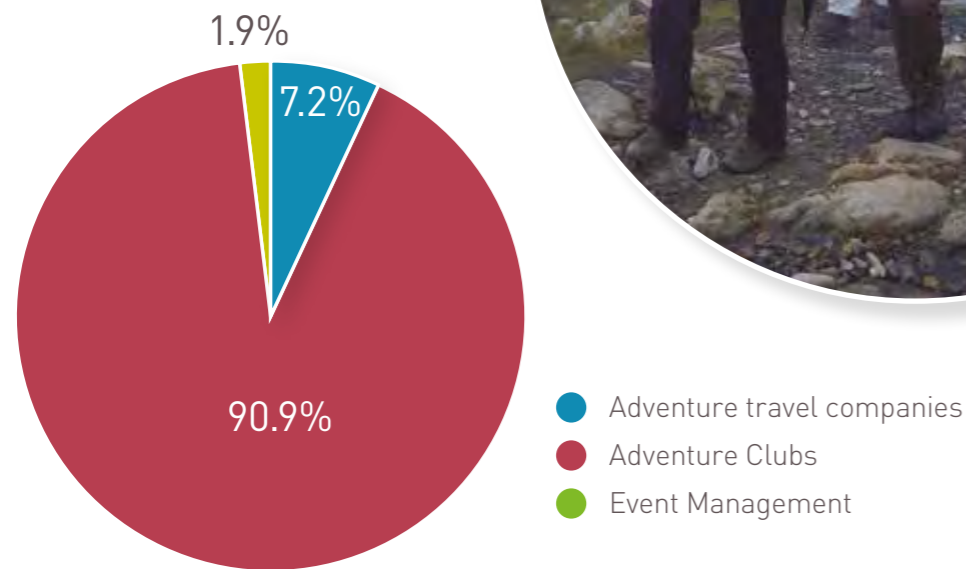


Image courtesy of GoApe

Provider Family: Social Connection



The primary reason for the provision is to help participants find other people to participate with. This is a big barrier to many people, especially those with busy lives in urban areas.

For some, the specific sport or activity is important, for others the shared enjoyment of the Outdoors is the focus.

Many of these providers are driven to defend the informal nature of participation, and are resistant to seeing their activity as sport. These providers are built on a recreational model or doctrine, with leadership at their core.

The responsibility for the management of risk is often ambiguous, and is a real issue for many volunteers and club based activities, especially when looking after minors.

- Adventure travel companies

Adventure travel holiday companies will tend to have an office (rather than a centre) and activity is booked through a combination of brochure and web based inspiration.

- Adventure Clubs

Includes all independent outdoor clubs on any scale, capacity or discipline. Also includes university clubs as key gateways to outdoor sport. Includes clubs as a physical or web location to find fellow participants.

- Event Management

A growing number of providers (both social enterprise and private sector) organising specific events, races, competitions and charity fund raising trips in the outdoors. Often large scale events, hence relatively few providers can serve a large number of participants.

Provider Workforce

Most of the leaders in this segment are driven by their own particular passion for sport. This is often not really a workforce at all, with such a heavy reliance on the voluntary sector.

Issues and Challenges

Modern adventure clubs are a success where traditional sport specific clubs are often struggling with an ageing membership.

Taking responsibility for minors is an increasing concern for volunteer club leaders.

There is an increasing expectation and pressure for qualified leaders. This is threatening the volunteer workforce.

Trends

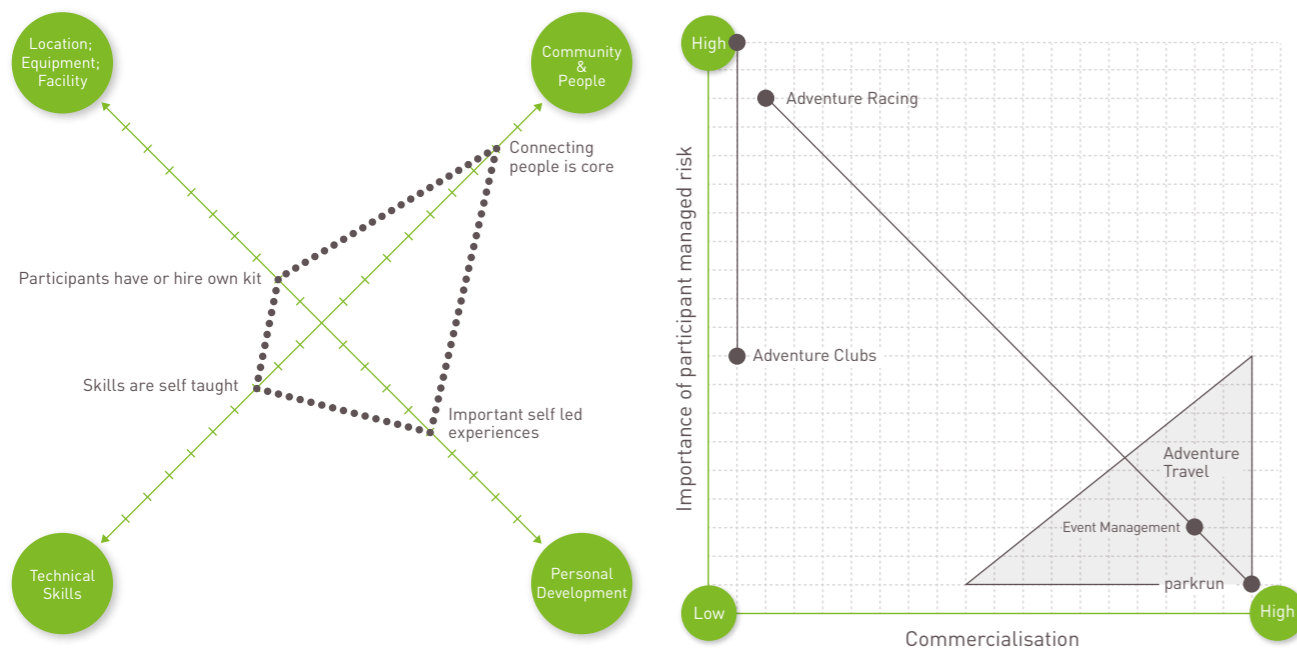
There has been success in user-group targeted products (e.g. The Big Acoustic Walk at Plas y Brenin) in bringing together like-minded people. This results in broadening traditional appeal to new markets or a different demographic.

This is another segment that benefits from the growth in micro adventures.

The adventure travel industry is booming as people become less likely to travel alone.

Prime Example

The Eagle Ski Club is a long standing traditional club. It now offers guided trips alongside the self-led club trips; and a variety of social events out of the ski season. Helping ski-tourers to find companions is as important now as it ever was, and the club is flourishing.



Eagle Ski Club Member led Tour



MAPPING PROVISION WITH PARTICIPATION

Plas-y-Brenin
National Mountain Centre



By developing two tools: to profile what is delivered, and how it is delivered; we have developed a method to profile all types of outdoor activity provision.

These profiles can then be directly compared to the motivational requirements of the eight participant segments, to see how well the demand is supplied.

Not only does this allow us to reach general conclusions about emerging trends and current gaps in provision; it allows us to expose and explore further specific opportunities to develop new and different products and interventions to better suit the segment types.

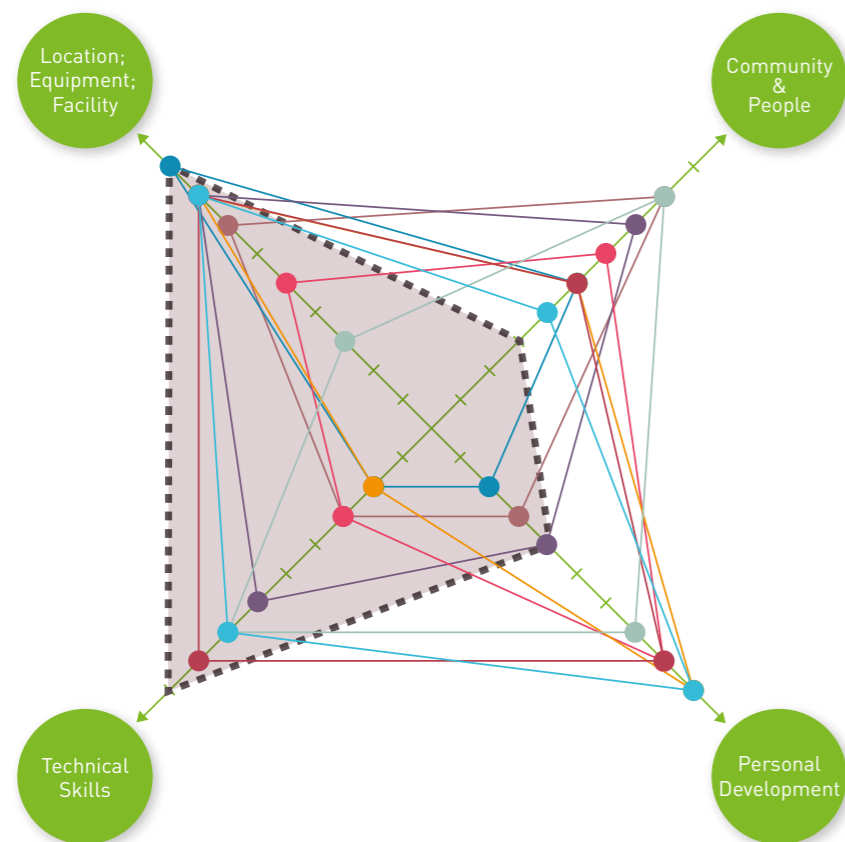
These tools are easy to understand and will readily benefit all types of provider: from sole traders to large organisations and NGBs alike.



Mapping Participation with Provision

The Provision Profiling Tool gives us a simple way to compare the key factors of provision against the motivational demands or requirements of participants. At a general level, it is possible to profile the delivery of a specific product, and to see how it may match the demands of different participant segments.

BMC Ready To Rock Course at Plas y Brenin



- Explorer
- Learner
- Freestyler
- Challenger
- Thrill Seeker
- Tribe Member
- Fitness in Nature
- Adventurer

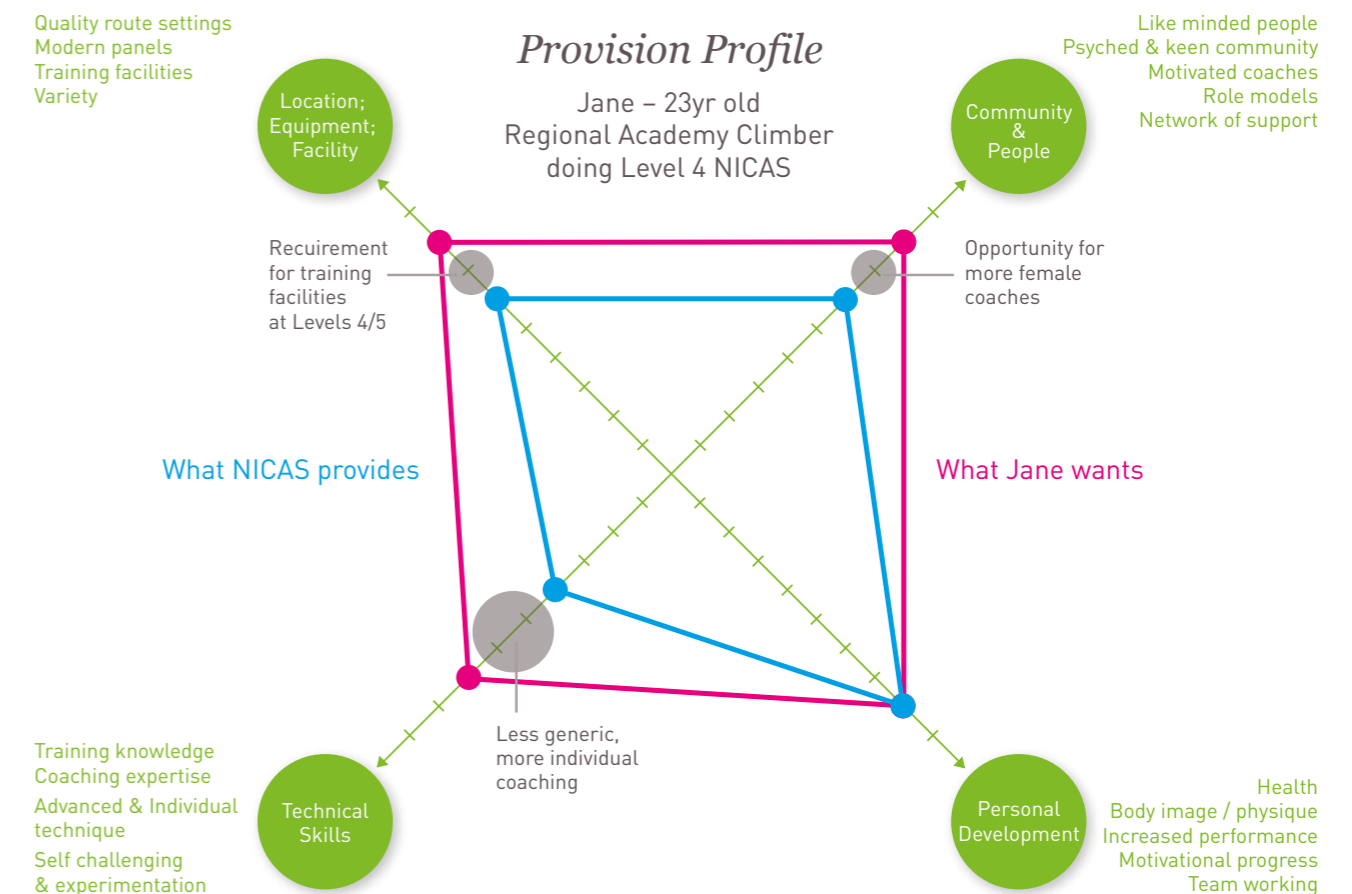
In this example, a BMC 'Ready to Rock' course (designed to specifically target sustained participation) can be plotted on the profiling tool. It is then easy to see how well it matches the needs of the different participant groups.

Furthermore, the tool generates important creative debate to question where and why gaps exist between the needs of participants and the current provision. In this way it is possible to identify changes to the product in order to make it more appealing to alternative segments.

Specific Example

A more specific use of the tool is made possible by adapting or identifying the priorities of delivery in order to take into account the key factors as required by the participant.

The specific details of delivery can be identified and prioritised: resulting in a weighted and fully informed scale in the profiling. The tool is even more powerful if the specific needs of the participant are profiled first. It is then possible for a provider, NGB or organisation to profile their delivery and reflect on how 'fit for purpose' the provision may be.



In this example, the board of the ABC Training Trust used the tool in a strategic review of the National Indoor Climbing Award Schemes. By focusing on the needs of various individual user groups it was possible to demonstrate how well the existing scheme meets their needs.

Furthermore, whilst the outcomes are subjective measures, it is possible to identify gaps between provision and participant needs. This generates discussion into how the provision may be improved; or how further products or interventions may be developed to fill the gaps.

Mapping Provision with Participation - Emerging Themes

When looking at the volume of all provision against the range of participant's needs there are some emerging themes:

- Limited provision of high risk 'physical facilities': there is a cultural reluctance to provide equipment or physical facilities to Challengers and Thrill Seekers due to the perceived high level of risk. The notable exceptions here are mountain bike and ski hire where provision of such equipment is plentiful.
- A high proportion of provision is focused on sports skills and personal development (70%) suggesting that the Tribe Member, Challenger and Learners are well catered for. This is largely attributable to the fact that many outdoor activity providers and members of the workforce are, in fact, Tribe Members and Challengers themselves. The design and delivery of products that would appeal to the provider (rather than focusing on the needs of key target segments) is a regular feature in the sector.
- Limited providers offer an opportunity to bring together communities and people despite this being a highly ranked need, particularly for the Freestylers; Explorers (family and social); Adventurers (family and social); Fitness in Nature (social). This may be due to the fact that these participants are not paying/using providers to do something with others. However where providers have offered an opportunity in bringing like minded people together the uptake has been positive, examples of this are the Big Acoustic Walk (Plas Y Brenin), Scott Contessa Women's only events and the big challenge events such as Great North Swim; Tough Mudder etc.



- The outdoor industry has seen growth in niche and nuance of existing sports. The outcome of this is that many participants are more discerning when it comes to the quality or specific type of rental equipment. Where once it was possible to rent out simple mountain bikes, the needs of a participant at a high level skills course are for high specification top of the range bikes and equipment. There is a regular trap for providers when the key factors of delivery contradict rather than complement one another.
- There has been a traditional assumption that the outdoors market was price sensitive. This led many providers to compete on cost rather than quality. The economic challenges of the past few years have proven that the outdoor participant is prepared to pay for quality – leading to greater success and growth for customer focused providers.
- There is a relatively high return on investment to be gained from the development of informal outdoor facilities. Whereas a building or physical facility requires management and ongoing costs, a bike trail, for example, will impact on very many more participants over a greater time span, with very little further expense. Evidence from Sport Northern Ireland on trail building suggests an investment of £5 per annual active user with an almost zero ongoing cost was possible. For example Bunkers Hill Trail costs £102k with annual usage of 20,000 visits.
- There is tremendous potential for NGBs to realise the potential of educating and engaging with providers in order to drive participation. With a vested interest in more customers, the outdoor providers represent a 9,000 strong sport development team. There is a great opportunity to land the findings of this report (and educate the use of the profiling tools) through the continuous professional development (CPD) programmes of coach and leader re-validation schemes.



APPENDIX

This section provides detail on the research methodology and project approach. Blank versions of the Profiling tools have also been included as practical resources for the reader.



Methodology

The project began with extensive desk based research and interviews with a wide range of Stakeholders including National Governing Bodies; National Trust; Forestry Commission; Brands; Retailers; Outdoor Education bodies; Natural England; Sport England. The Outdoor Participation Survey was then designed to illicit the Why, Who, Where, When and What of outdoor participation. The 8,493 survey responses from participants and non participants were cross matched with several other in-depth Stakeholder surveys to ensure the trends were in line with the broader market understanding. These responses, along with the desk based research, were then analysed to form an in-depth understanding of the outdoor participant. With the survey distributed through main-stream and multi-sport outdoor organisations, the authors acknowledge the possibility that it did not reach a representative population for equestrian sport. Active People survey data has been included on p78 for comparative purposes.

Running alongside this participant understanding, the project team sought to understand the scale of Outdoor Recreation provision through desk based research and interviews with providers and Stakeholders. Provision data from several sources was captured and cleansed resulting in a list of over 9,000 unique and identifiable providers. This list was then analysed and segmented. Participation and provision understanding were then mapped together, identifying gaps and opportunities between the current provider and the consumer motivations. Finally these opportunities are explored with first thoughts on where they may be exploited moving forward.

Beginning of July 2014

Understanding Outdoor Participation

Understanding Outdoor Provision

Desk Based Research

Interviews carried out across full spectrum of Outdoor Activity Providers and analysed

Compilation of Outdoor Provision List

Numerous sector-wide lists gathered and de-duplicated to create a master list of over 9,000 providers

Analysis of Provision Data

Emerging trends from the data were followed up by interview with key stakeholders and organisations

Creation of Provision Insight and Segments

Desk Based Research

Analysis of over 400 pieces of data and research, including academic research, major data sources; stakeholder market insight (UK and International); commercial consumer insight

Interviews with key stakeholders

Development of Outdoor Participant Survey

Circulation of Outdoor Participation Survey to Participants and Non Participants

In partnership with GoOutdoors and supported by Sport England, National Trust, Forestry Commission and YHA
8,493 responses

Analysis of Survey Data and Stakeholder Consumer data

Analysis of over 11,000 participant and non-participant voices

Creation of Participant Insight and Segments (with Sub Segments)

Input from a range of stakeholders from across the following categories:

- Education & Training
- Education Associations & Networks
- Accreditation, Licenses & Schemes
- Communication
- Retailers
- Sport and Recreation Leadership and Governance
- Industry Specific Leadership and Governance
- Industry Specific Networks
- Industry Specific Campaign Organisations
- Tourism
- Social Cohesion
- Destination Providers
- Industry Specific Disability Organisations
- Industry Specific Activity Implementors
- Professional Trade Associations
- Member Organisations – consumer / professional
- Instruction, Education, Training, Licensing & Professional
- Holiday / Outdoor Activity Providers
- Skills Training Providers (centres)

Mapping of Provision with Participation

Report Development

Beginning of June 2015

Final Report to Sport England

Project team:
Kelly Gordon; Martin Chester; Andrew Denton;
Naomi Corp; Kate Edhouse; Gina Hayes.



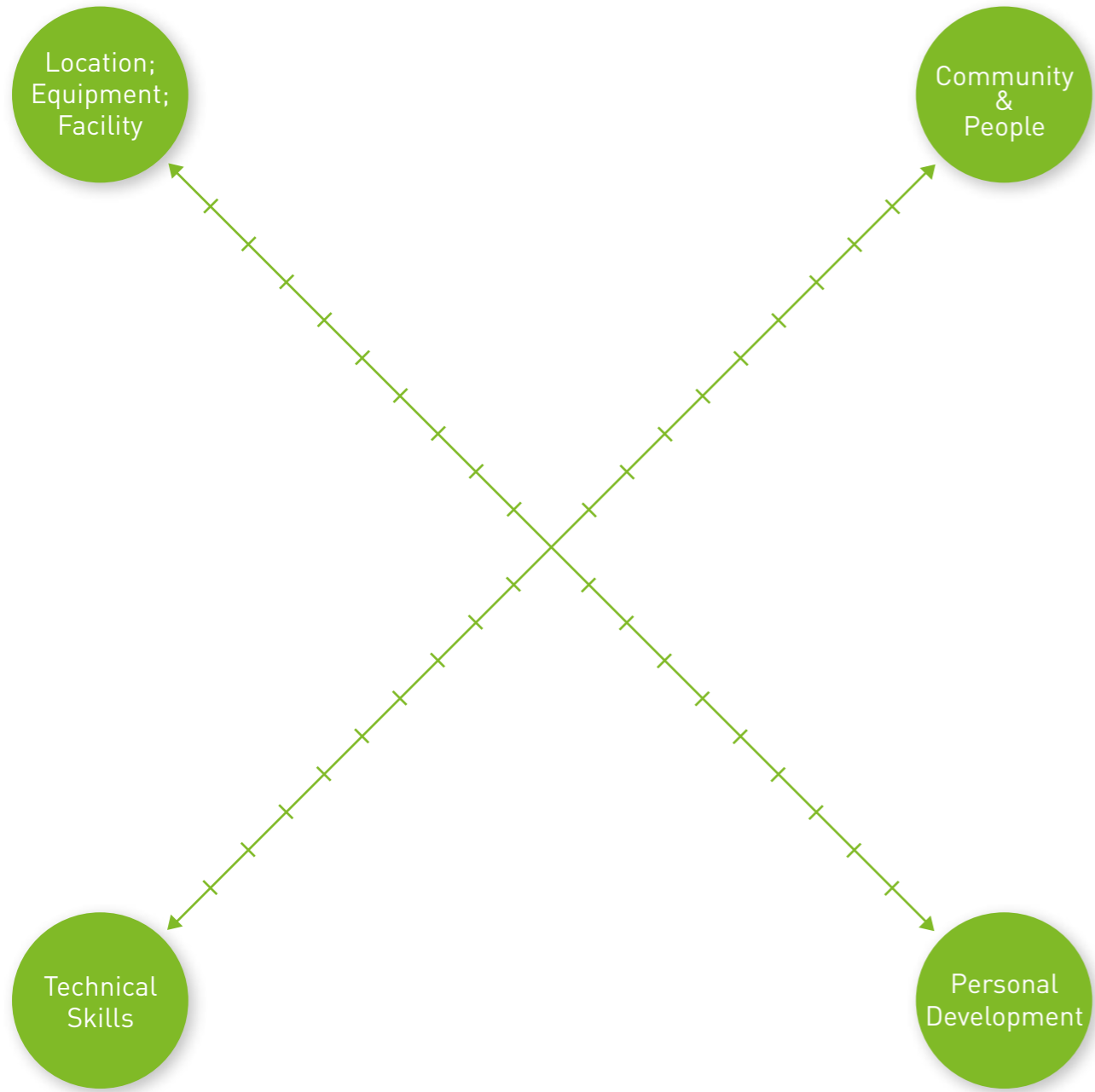
Provision Profiling Tool

Add Activity Specific Examples:

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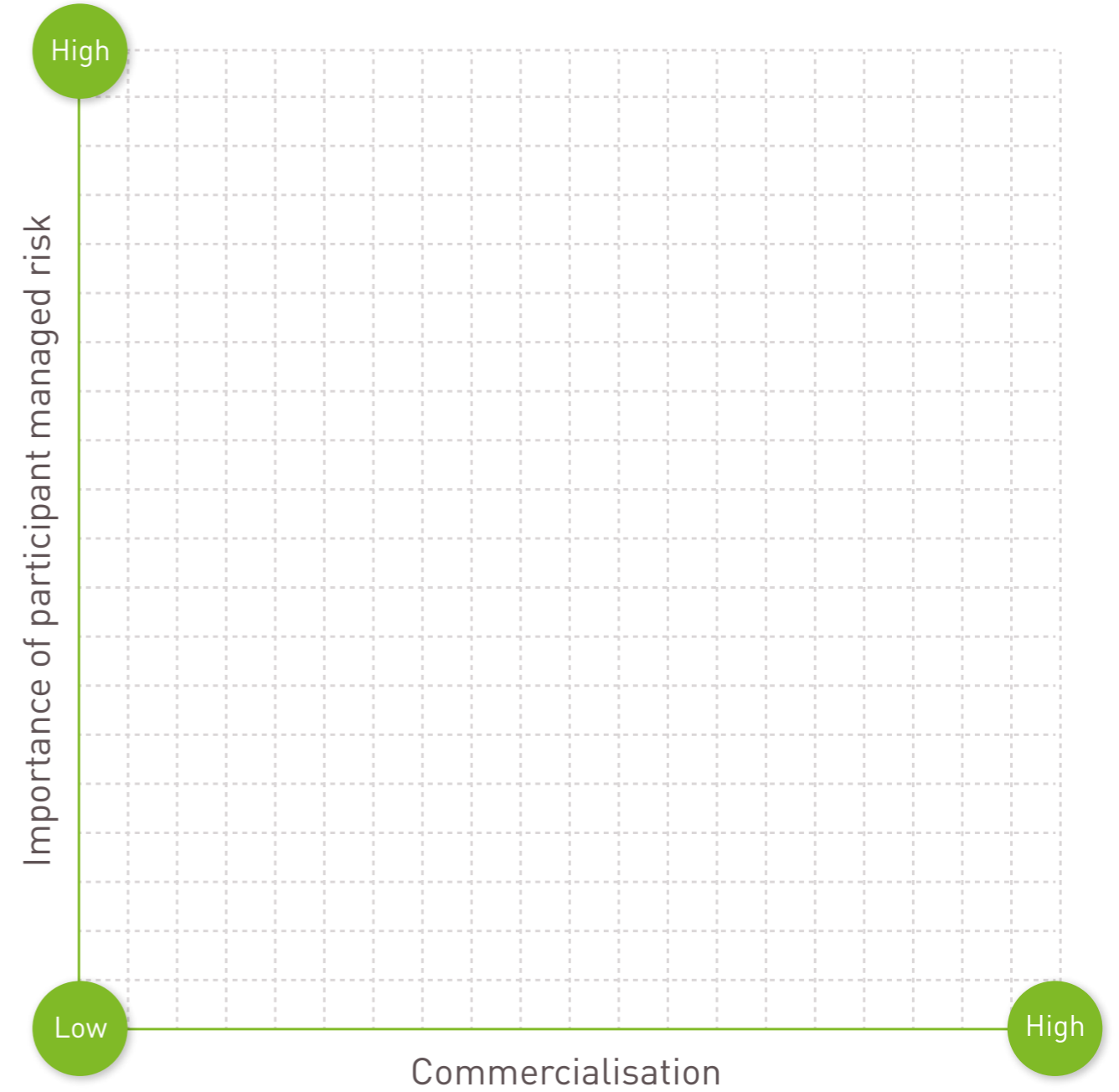


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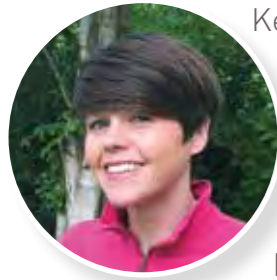
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Activity Profiling Tool



Biographies



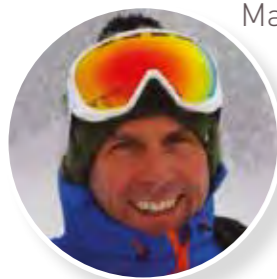
Kelly Gordon has been working in the sports development sector for over 15 years. Starting her career as a sports development officer and coach, she progressed through regional and national roles to become Development Director of England Netball in 2009.

Kelly was the first Development Director to embed a participant centred approach, resulting in whole sport change and development of England Netball's four year strategy - Your Game, Your Way.

She took this philosophy to her role as Strategic Lead for Clubs at Sport England where she was responsible for managing all Sport England's club programmes including the StreetGames Doorstep Club project, Club Leaders and Clubmark. During her time at Sport England she instigated the 'one stop shop' support for clubs (Club Matters).

In more recent years she has established herself as an independent consultant specialising in participant understanding, market insight and supporting organisations to be participant centred. She has worked across a range of NGBs and other organisations including the Outdoor Industries Association; Rugby Football League; British Canoeing; FA; StreetGames; PwC.

She enjoys nothing more than spending time with her husband and four year old son playing on their bikes in Delamere - a true Family Explorer!



Martin Chester is one of the most highly qualified and experienced practitioners in the UK outdoor industry, having worked at three National Centres. Martin has been the Director of Training and now Development, at Plas y Brenin, Sport England's National Mountain Centre. He is the Coaching Development Officer for Mountain Training UK having led on the development of a new coaching award scheme in climbing; as well as the climbing expert on the Hidden Talent programme for Channel 4. He has been a strategic lead for talent profiling

in developing the talent pathway for the British Mountaineering Council. He is also the Executive Officer for the ABC Training Trust and oversees the development of the National Indoor Climbing Award Schemes. He now works as a freelance coach, guide and adventure sports consultant to the outdoor sector. He would rather be skiing.



Andrew Denton has been working in outdoor recreation since 1984, starting his career in outdoor education and then moving on to a series of senior management and ownership roles in businesses such as Rohan, Mountain Equipment, Sprayway, Peaco Group, Outdoor Sports Company and now climbing walls.

He is best known as the founder and co-owner of the modern Mountain Equipment brand where he worked for over 15 years.

Today he works as the CEO of the Outdoor Industries Association, the body that promotes and represents the UK Outdoor Recreation Industries to government and across the world.

A keen outdoor activist, Andrew is an accomplished mountaineer, mountain biker, ski mountaineer and triathlete with first ascents in Patagonia and Antarctica and a broad background of outdoor adventures across the world.

The Outdoor Industries Association

A Community Interest, not-for-profit Company, with over 200 members that represent the biggest single group of Outdoor recreation stakeholders in the UK.

Founded over thirty years ago as a trade organisation for Outdoor shops and brands, the OIA has grown and changed significantly in the last three years. Members now include Outdoor governing bodies such as the BMC, BCU, BOF and Parkour; Charities such as the YHA, Ramblers and Project Wild Thing, NGO's like the National Trust and the Camping & Caravan Club. Equally the commercial bodies such as brands like Berghaus and shops like Blacks remain at the heart of the organisation funding it with significant annual donations, sitting on the board and offering company resources to drive forward projects.

The mission statement of the OIA is;

'To Engage, Represent and Promote the Outdoor Recreation Industries in the UK', with a long term goal to 'Get More People Active Outdoors.'

The authors wish to thank the wide range of bodies from the Outdoor Recreation Community who have contributed to this report, including but not limited to the following: national governing bodies (British Cycling, British Mountaineering Council, British Canoeing, British Orienteering, Parkour UK, Snowsport England, Triathlon England, British Kitesports, The RYA, British Rowing); Ramblers; Calvert Trust; BASI; SnowCamp; EOC; DofE; National Trust; Forestry Commission; Canal and River Trust; YHA; Sport & Recreation Alliance and it's membership; All Party Parliamentary Group for Mountaineering; Tourism Alliance; UKC website; Plas Y Brenin National Mountain Centre. Belinda Wheaton and the University of Brighton. As well as many many more.

We especially want to thank GoOutdoors for the help they gave enabling the Outdoor Participation Survey.



Andrew Denton
CEO
Outdoor Industries Association



Stephen Newlands
Chairman, OIA & Managing Director
AMG Group



Anthony Greenby
Owner
Countryside Ski & Climb



Richard Leadham
Brand President,
Berghaus



Robert Louder M.B.E.
Director General,
The Camping & Caravanning Club



Frank Bennett
Sales & Marketing Director,
Lyon Equipment



Hamish Dunn
Brand Director,
Mountain Equipment



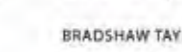
Hans Falkenberg
CEO
Cotswold Outdoor



Ken Reece
Managing Director,
Blacks Outdoor Retail



Corry Taylor
Managing Director,
Bradshaw Taylor



Caroline White
Chief Executive
YHA



Sport England is focused on helping people and communities across the country create a sporting habit for life.

To achieve this we invest National Lottery and Exchequer funding in organisations and projects that will:

- Create more opportunities for young people to play sport
- Nurture and develop talent
- Provide the right facilities in the right places
- Support local authorities and unlock local funding
- Ensure real opportunities for communities.

