

# Getting Active Outdoors



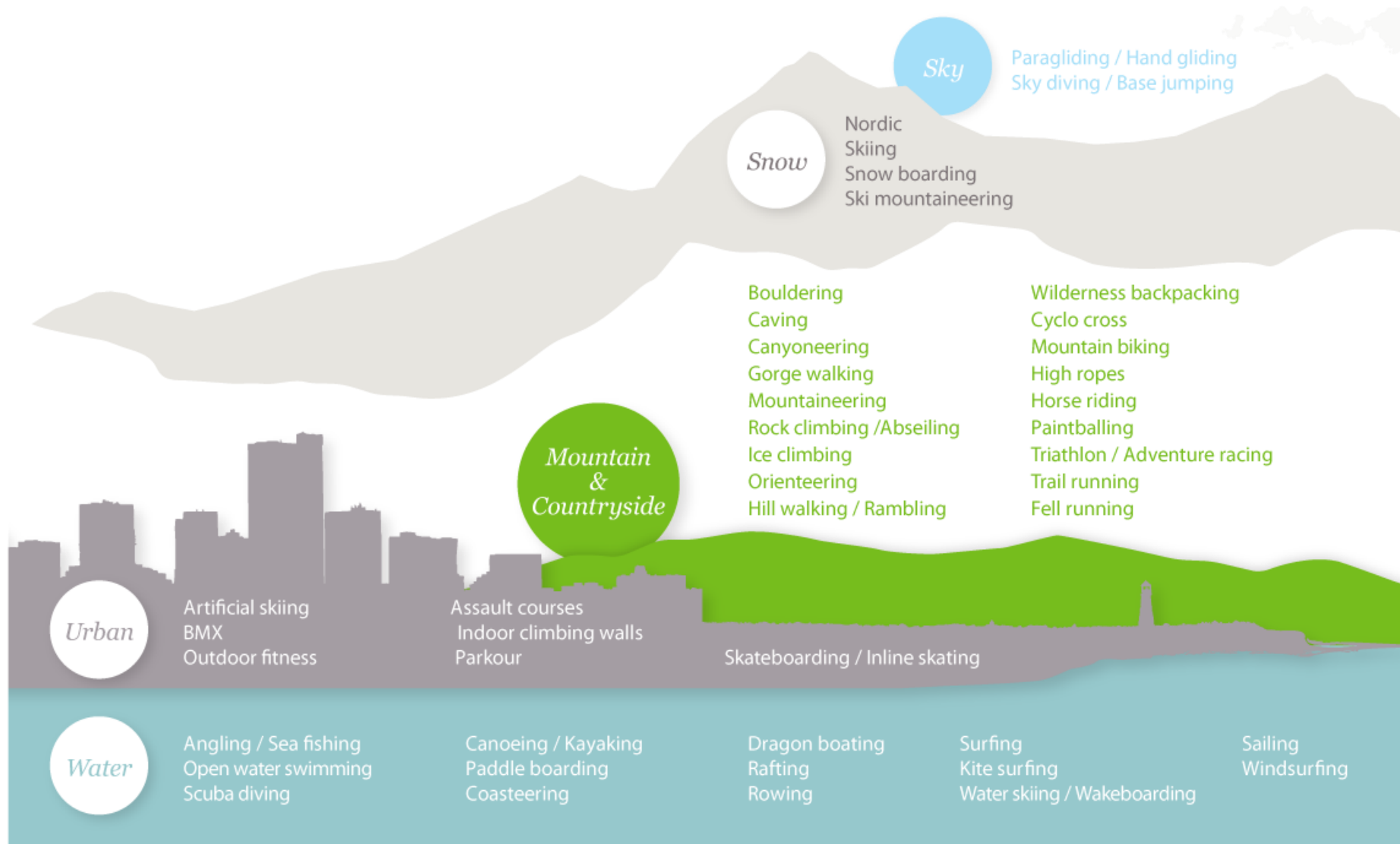
- Slide pack for dissemination of the outdoors insight by workshop delegates
- Getting Active Outdoors report page numbers are referenced in the bottom left corner of each slide.

# Getting Active Outdoors: Insight



- Delivering to customer wants and needs
- Consumer led, engaging key stakeholders
- Understand the market
- Customer motivations
- Outdoors provision
- Mapping tools

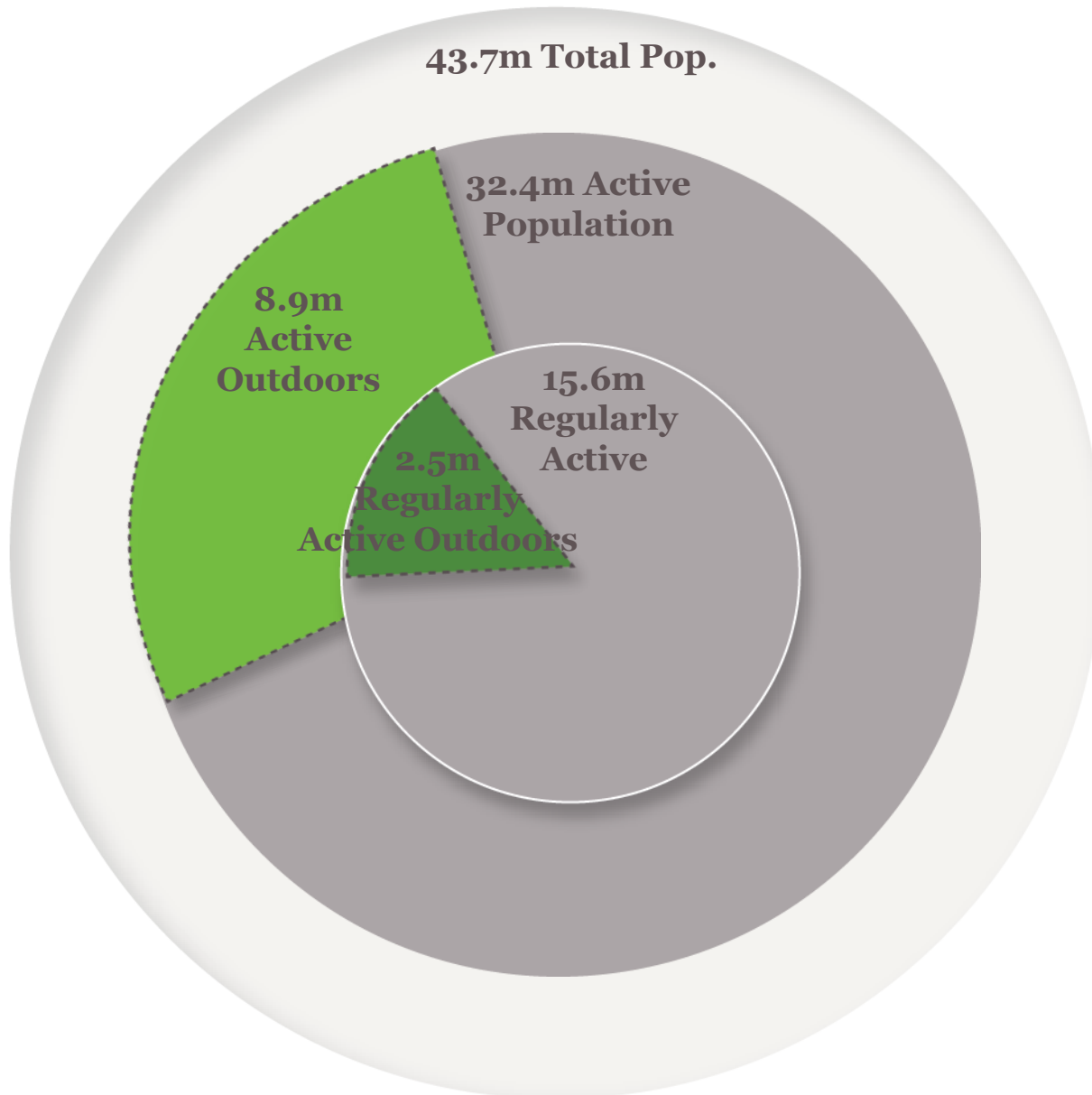
# Definition of Outdoors Participation



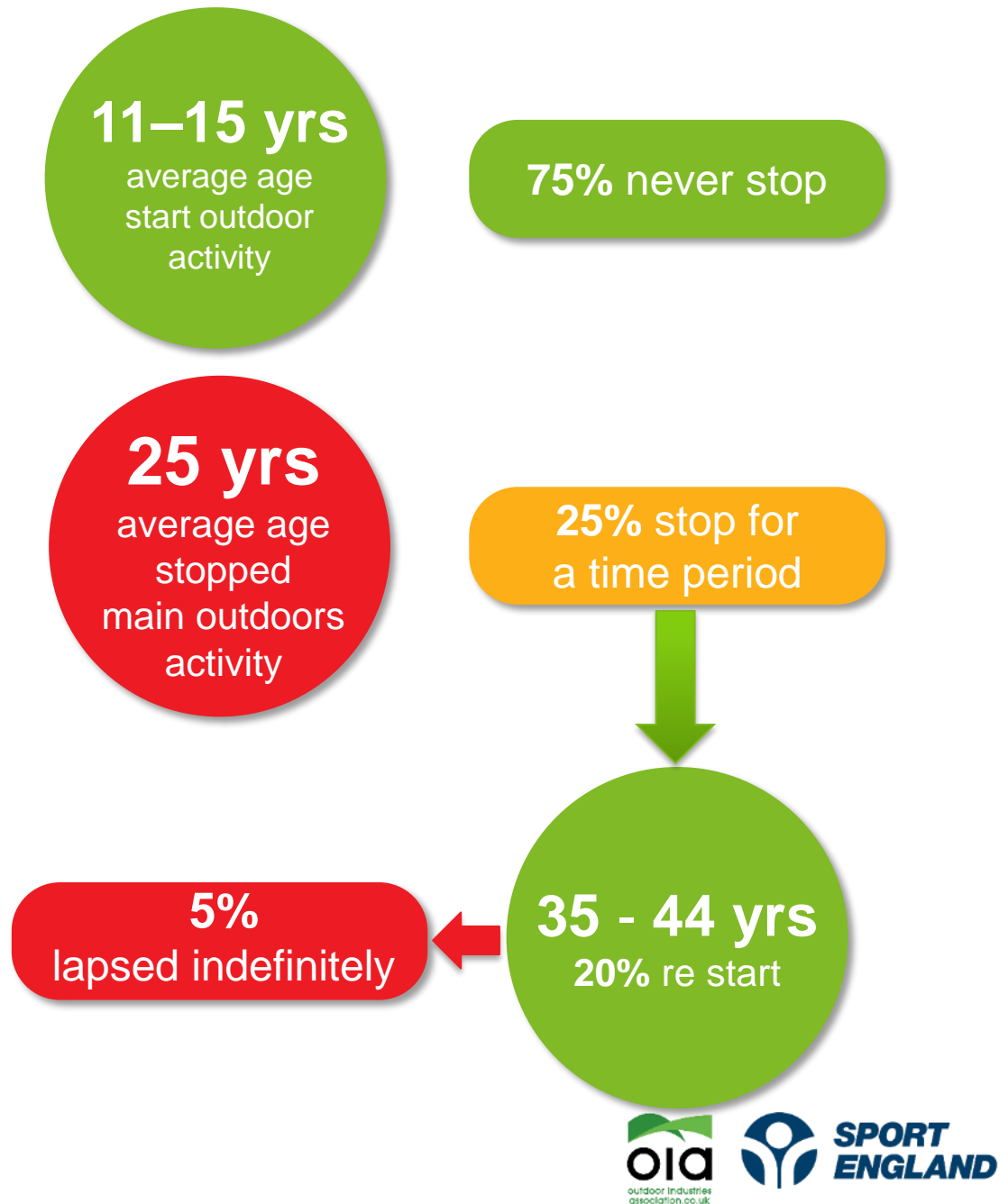
*Participation:*

*Market, Lifecycle & Preferences*

# *Outdoors Participation Market*

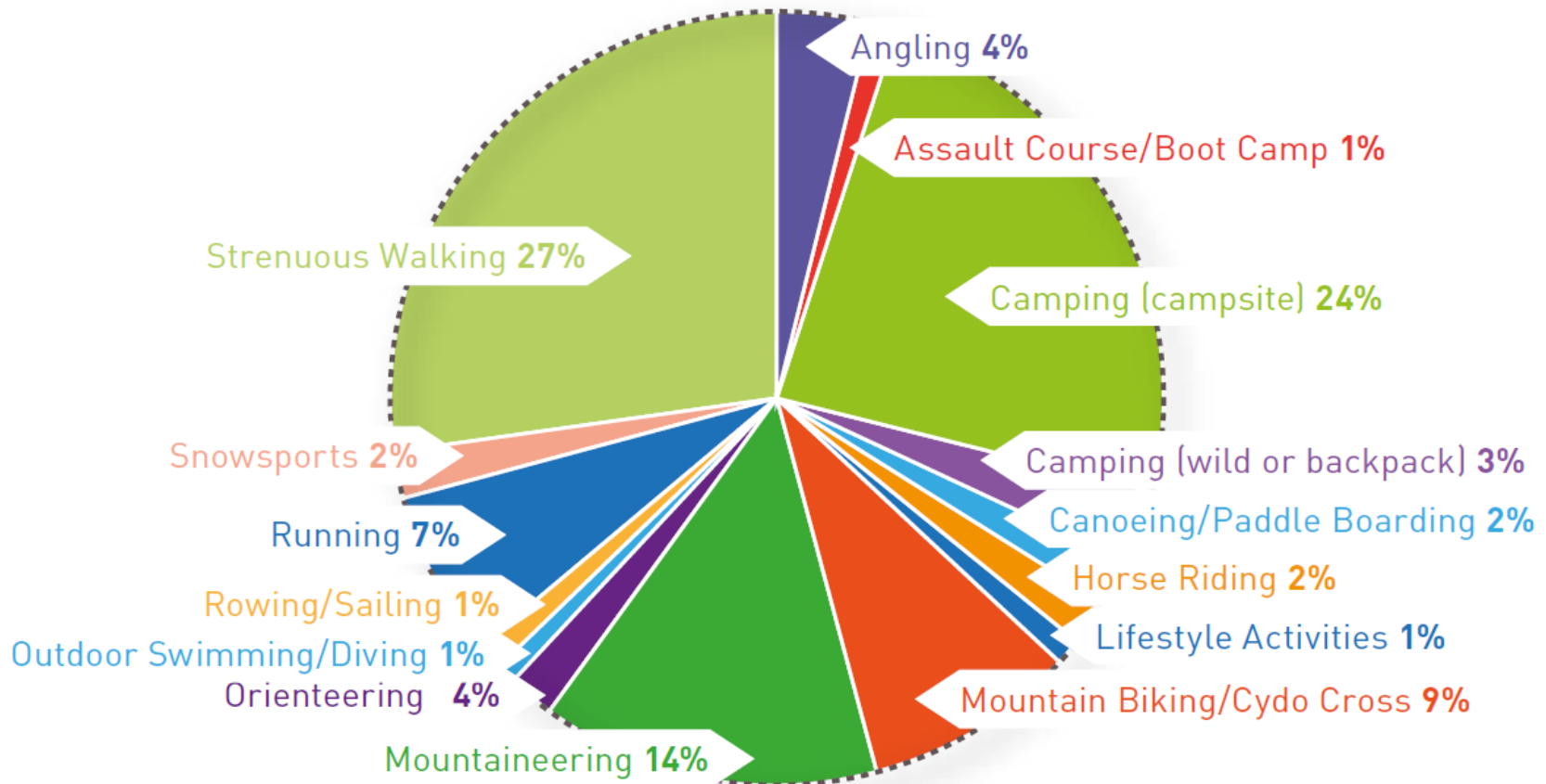


# *Lifecycle of Participation*



# *Sport and Activities*

## Outdoor Participation Survey – Main Activity





# *Time of Year: 61% participate throughout the year*





*Participation:*

*Motivations & Opportunity*

# *Trends Impacting on Outdoor Activities*

*Modern  
lifestyle*

*Rise in  
lifestyle  
sports*

*People do not  
separate online  
and offline  
activities*

*Shifting  
Demographics*

*Growing  
urban  
population*

*The word  
'Sport' is a  
turn off*

*Nervousness of  
outdoor space*

# *Key Reasons to Participate Outdoors*

**No 1.**



To Spend Time  
with Family

**U18 yrs**



To Have Fun  
with Friends

**10%**



Alternative to  
Traditional Sport

# *Key Reasons to Participate Outdoors*

**55yrs plus**



To Enjoy the Scenery/  
be Close to Nature

**40%**



For Fresh Air and to  
Enjoy the Weather

**18-24yrs**



To Relax and  
De-Stress/Get Away  
from Modern Life

# Participant Segments



EXPLORER



CHALLENGER



ADVENTURER



FREESTYLER



THRILL SEEKER



TRIBE MEMBER



FITNESS IN NATURE



LEARNER



# 33%

## 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.



*Largest Segment*

*Females & Older*

*Family*

*Monthly/ Occasional*

*Countryside*

*‘Softer’ activities*

# 21%

## THE CHALLENGER

**Profile:** put their body on the line and controls the battle against nature. Push 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.



*2<sup>nd</sup> Largest Segment*

*Social*

*Male*

*All ages*

*Fitness in Nature*

*Frequent & Consistent*

# 17%

## 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.



*Equal male/ female*  
*Frequent & Consistent*  
*From doorstep*  
*35yrs plus*

# 9%

## 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.



*Male*  
*Frequent & Consistent*  
*Instructors/ Leaders*  
*Countryside*

# 7%

## 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.



***24-44yrs***

***Started young***

***Summer***

***'Harder' activities***



# 7%

## 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 an outdoors sport/ activity along the way.



*Countryside & Water  
Monthly/Occasional  
Friends*

# 4%

## 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.



*Male*

*Youth*

*Urban*

*Frequent & Consistent*

# 3%

## 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.



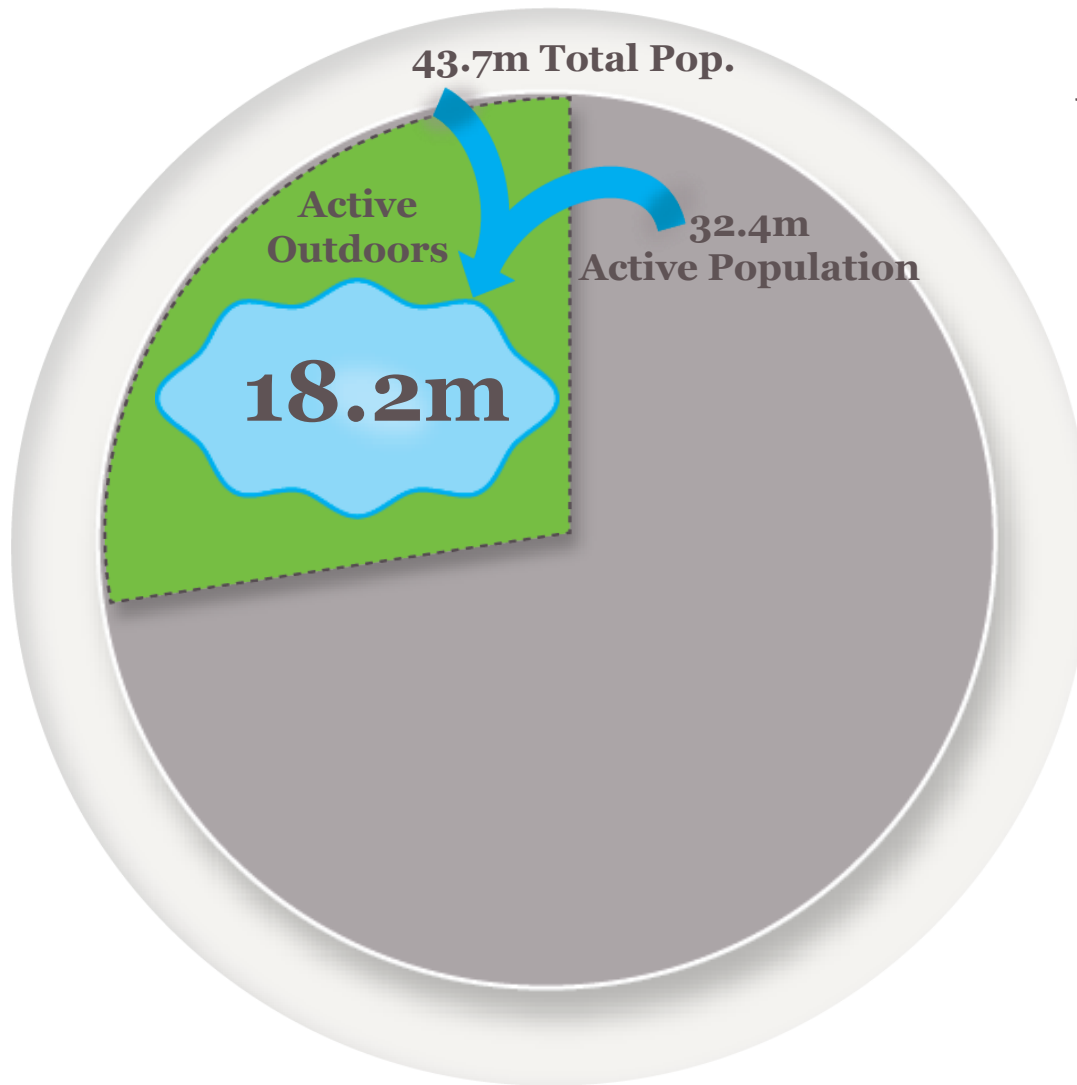
***Smallest Segment***

***80% male***

***20's/ early 30s***

# *Opportunity: Growth Markets*

# *New Participants*



18.2m not active, or not active outdoors,  
**want to take part**



**FREESTYLER**



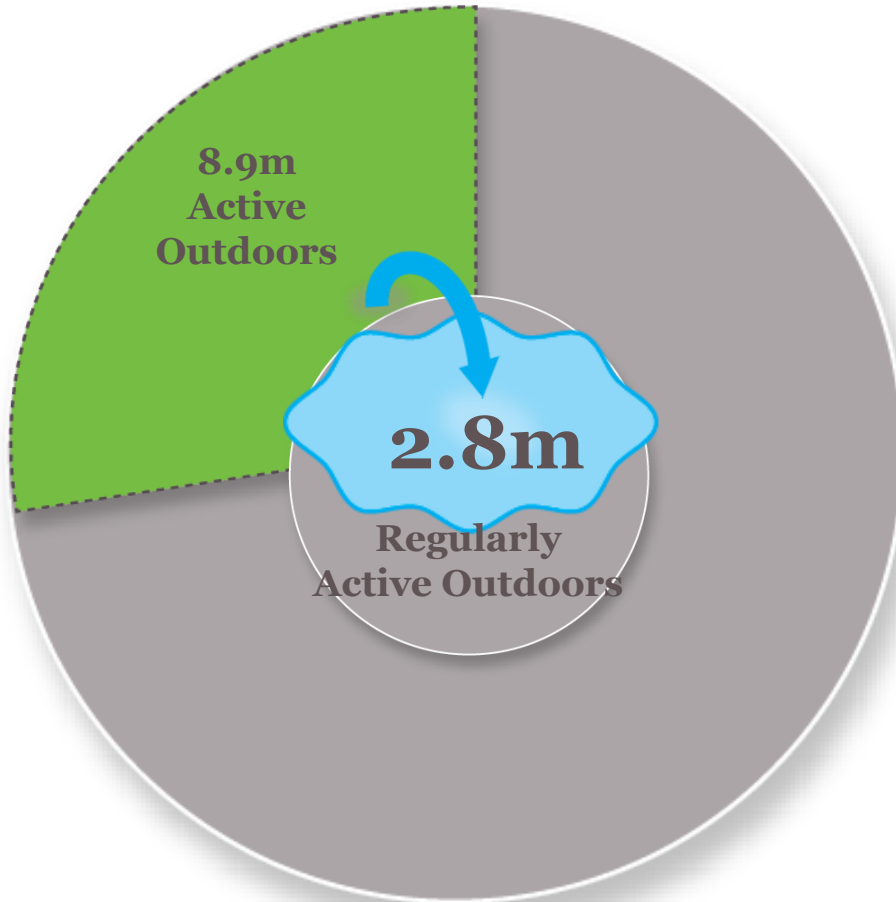
**CHALLENGER**



**FITNESS IN NATURE**



# *Existing Participants*



31% active outdoors want to  
**do more**



**LEARNER**



**CHALLENGER**



**ADVENTURER**



**THRILL SEEKER**

*Provision:*

*Landscape, Scale & Opportunity*

# *The Modern Outdoors Landscape*



Water sports  
shop selling  
trips and  
expeditions

Climbing Wall  
and surf shop  
round corner



Stand Up  
Paddle boarding



Huge community  
footfall and  
events

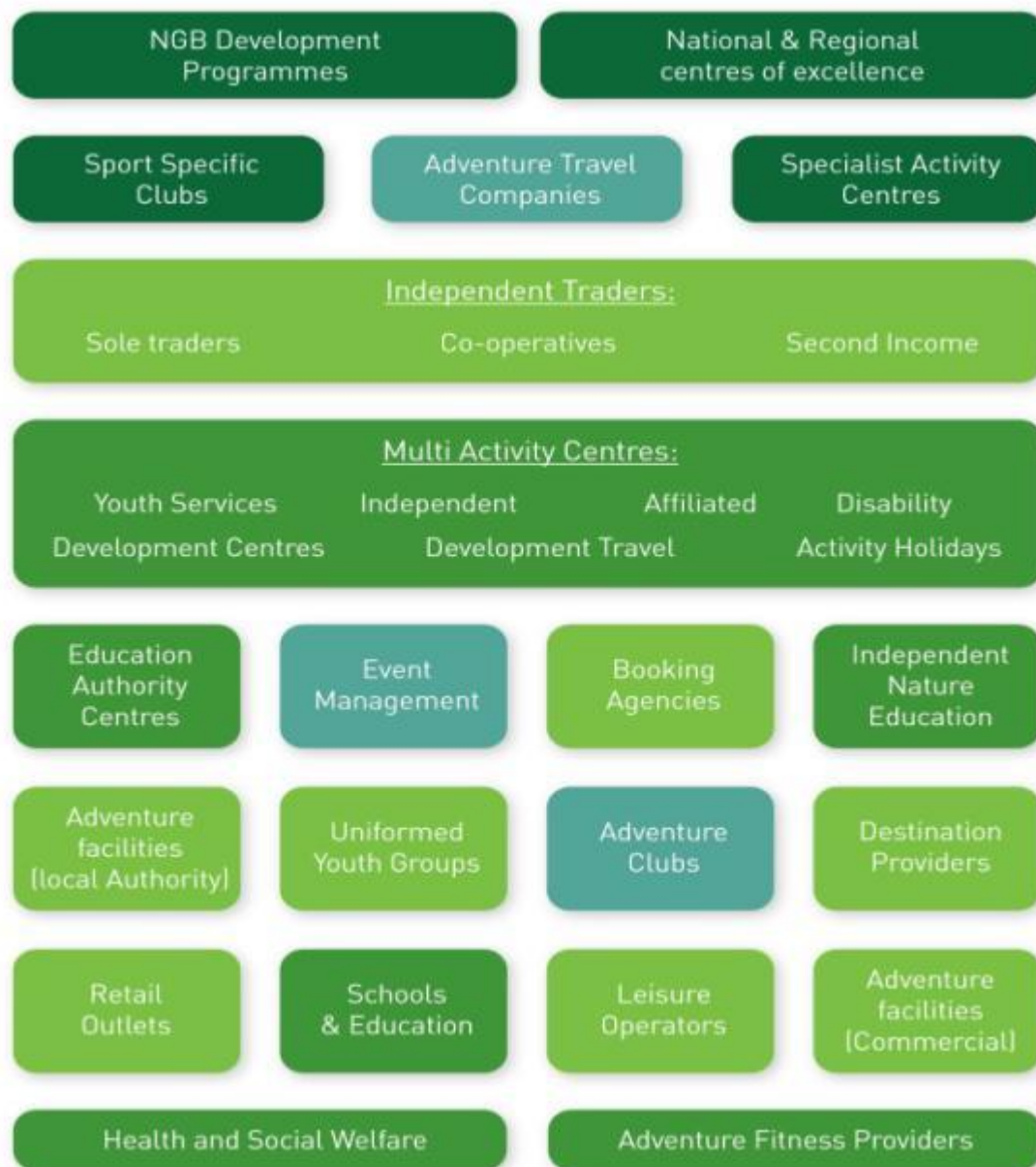


Innovative  
climbing  
competition



Bike and Canoe  
hire companies

# Scale of the Market - Providers



- Complex market
- No single register
- 9,600 activity providers

# *Same Activity: Different Products*



Vehicle for  
Development



Commercial  
Activity



Mountaineering  
Skill



# *Why go to an Activity Provider?*



# *Provision: What a participant wants*

Facility Focussed  
Accessibility  
Quality of features  
Key details  
Specialist equipment

Location;  
Equipment;  
Facility

Community  
& People

Role Models  
Marketing and Imagery  
Sense of Belonging  
Signposting  
Social Media

Challenger workforce  
Sport Specific focus  
Skills coaching  
Technique led syllabus

Sport  
Skills

Personal  
Development

Motivational progress  
Body image / physique  
Spiritual well-being  
Personal Competence  
Physical and Mental Health

**Greatest Demand  
and Potential**

# *Provision: What is provided*

Facility Focussed  
Accessibility  
Quality of features  
Key details  
Specialist equipment

Location;  
Equipment;  
Facility

Community  
& People

Role Models  
Marketing and Imagery  
Sense of Belonging  
Signposting  
Social Media

**Majority Sport/Facility  
Specific Offering**

Challenger workforce  
Sport Specific focus  
Skills coaching  
Technique led syllabus

Sport  
Skills

Personal  
Development

Motivational progress  
Body image / physique  
Spiritual well-being  
Personal Competence  
Physical and Mental Health

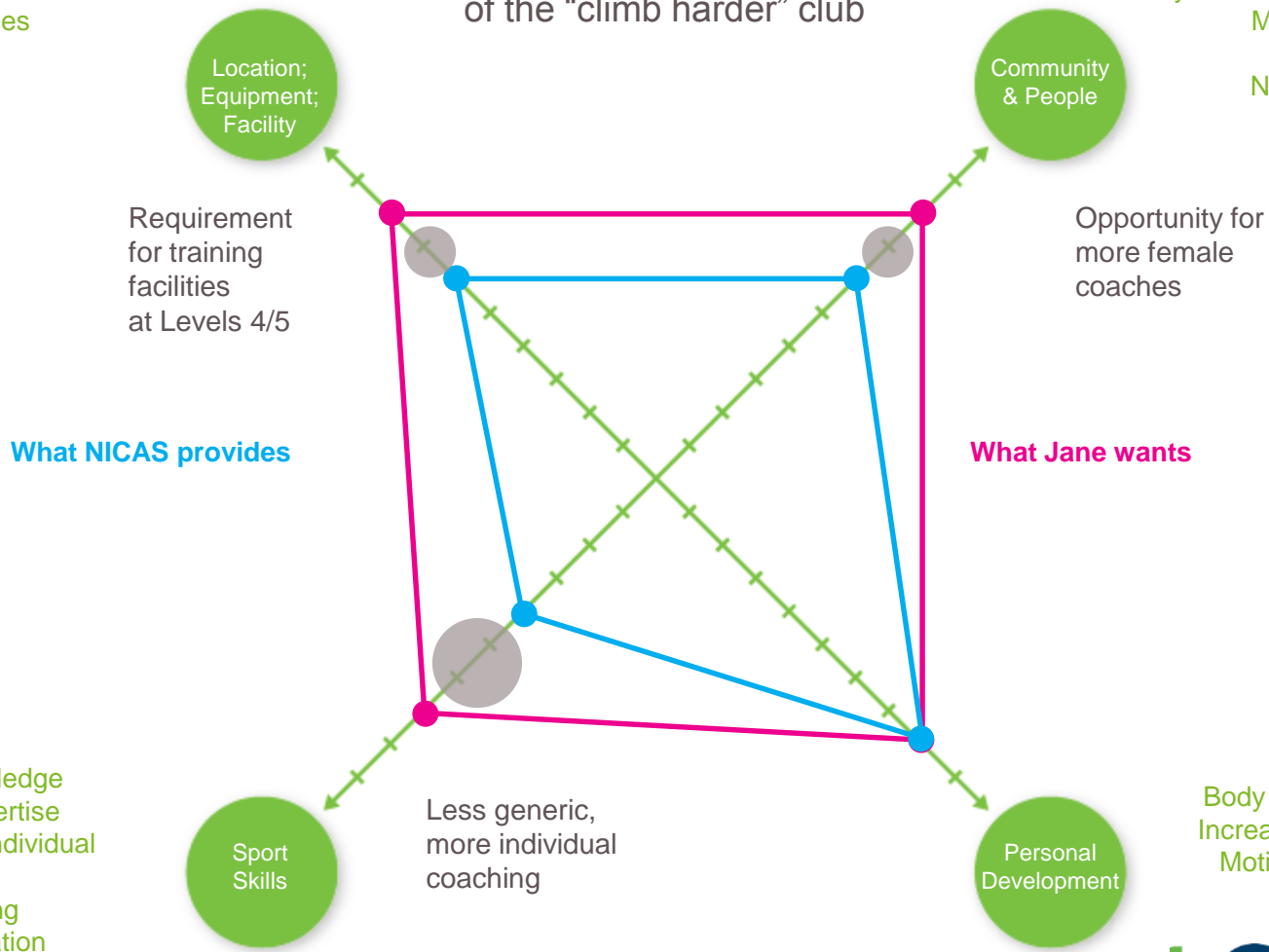
# Provision: Supply v Demand

## Provision Profile

Jane is a 23yr old member of the “climb harder” club

Quality route settings  
Modern panels  
Training facilities  
Variety

Like minded people  
Psyched & keen community  
Motivated coaches  
Role models  
Network of support



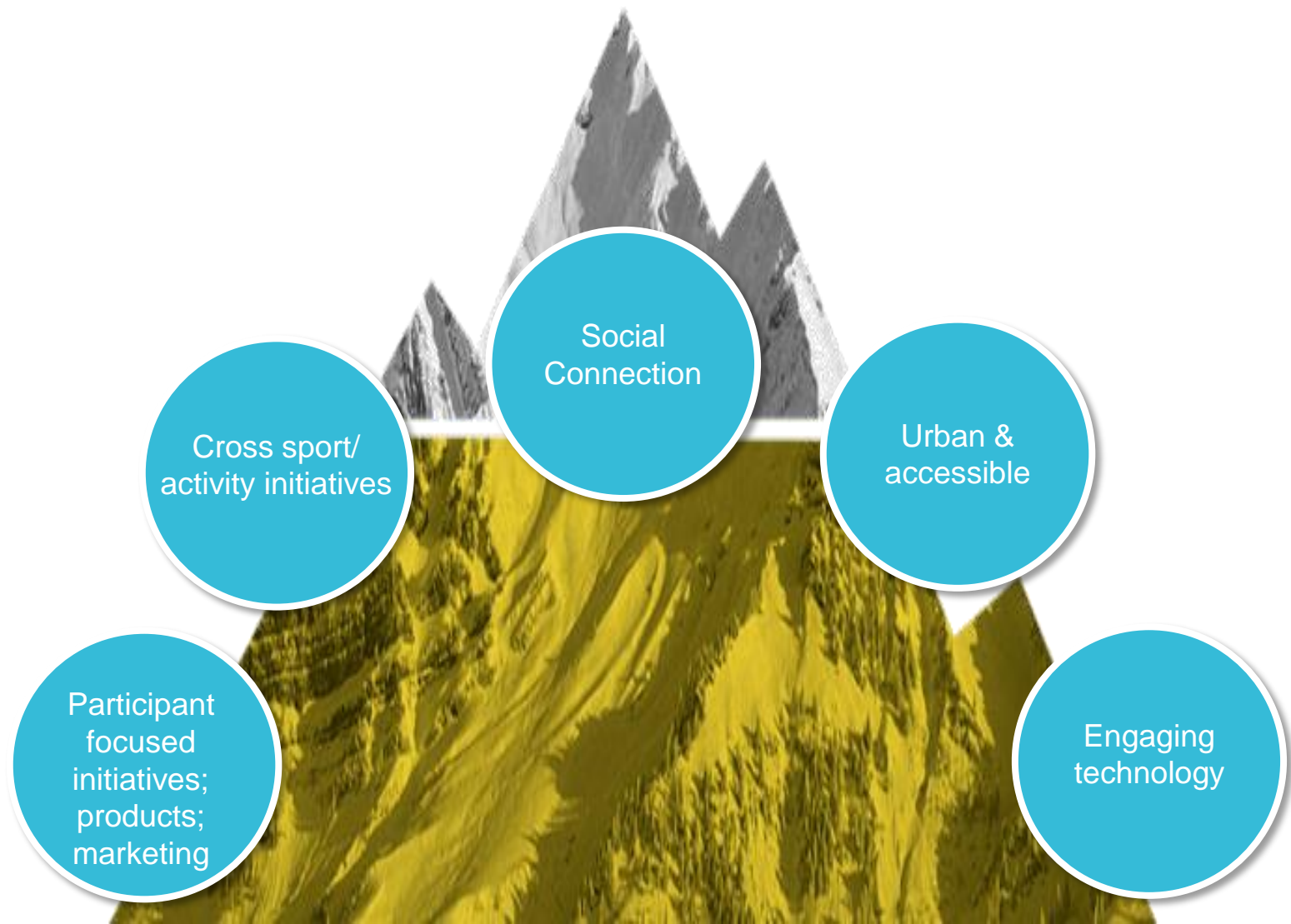
Training knowledge  
Coaching expertise  
Advanced & Individual technique  
Self challenging & experimentation

# *Summary*

*We're here*







***The opportunity is here***