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

- Urban: Artificial skiing, BMX, Outdoor fitness
- Water: Angling / Sea fishing, Open water swimming, Scuba diving
- Mountain & Countryside: Assault courses, Indoor climbing walls, Parkour, Skateboarding / Inline skating
- Snow: Nordic skiing, Snowboarding, Ski mountaineering
- Sky: Paragliding / Hand gliding, Sky diving / Base jumping
- Bouldering, Caving, Canyoneering, Gorge walking, Mountaineering, Rock climbing / Abseiling, Ice climbing, Orienteering, Hill walking / Rambling
- Wilderness backpacking, Cyclo cross, Mountain biking, High ropes, Horse riding, Paintballing, Triathlon / Adventure racing, Trail running, Fell running
Participation:

Market, Lifecycle & Preferences
Outdoors Participation Market

- 43.7m Total Pop.
- 32.4m Active Population
- 8.9m Active Outdoors
- 2.5m Regularly Active Outdoors
- 15.6m Regularly Active

Outdoors Participation Market Report p14
Lifecycle of Participation

11–15 yrs
average age
start outdoor
activity

25 yrs
average age
stopped
main outdoors
activity

35 - 44 yrs
5% lapsed indefinitely
20% re start

75% never stop
25% stop for
a time period

Report p30
**Sport and Activities**

Outdoor Participation Survey – Main Activity

- **Camping (campsite)**: 24%
- **Mountaineering**: 14%
- **Mountain Biking/Cyco Cross**: 9%
- **Running**: 7%
- **Orienteering**: 4%
- **Snowsports**: 2%
- **Rowing/Sailing**: 1%
- **Outdoor Swimming/Diving**: 1%
- **Angling**: 4%
- **Lifestyle Activities**: 1%
- **Assault Course/Boot Camp**: 1%
- **Horse Riding**: 2%
- **Canoeing/Paddle Boarding**: 2%
- **Camping (wild or backpack)**: 3%
- **Strenuous Walking**: 27%
Time of Year: 61% participate throughout the year
Participation:

Motivations & Opportunity
Trends Impacting on Outdoor Activities

- Modern lifestyle
- Rise in lifestyle sports
- Shifting demographics
- The word ‘Sport’ is a turn off
- Growing urban population
- People do not separate online and offline activities
- Nervousness of outdoor space

Report p16-17
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

ADVENTURER

THRILL SEEKER

FITNESS IN NATURE

CHALLENGER

FREESTYLER

TRIBE MEMBER

LEARNER
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.

*2nd 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

Report p46-49
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
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.
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
18.2m not active, or not active outdoors, want to take part

New Participants

43.7m Total Pop.

32.4m Active Population

Active Outdoors

18.2m

FREESTYLER

CHALLENGER

FITNESS IN NATURE
Existing Participants

8.9m Active Outdoors

2.8m Regularly Active Outdoors

31% active outdoors want to do more

LEARNER

CHALLENGER

ADVENTURER

THRILL SEEKER
Provision:

Landscape, Scale & Opportunity
The Modern Outdoors Landscape

Climbing Wall and surf shop round corner

Water sports shop selling trips and expeditions

Huge community footfall and events

Stand Up Paddle boarding

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?

- Location; Equipment; Facility
- Community & People
- Technical Skills
- Personal Development
Provision: What a participant wants

- Facility Focussed
  - Accessibility
  - Quality of features
  - Key details
  - Specialist equipment

- Location; Equipment; Facility

- Sport Skills
  - Challenger workforce
  - Sport Specific focus
  - Skills coaching
  - Technique led syllabus

- Community & People
  - Role Models
  - Marketing and Imagery
  - Sense of Belonging
  - Signposting
  - Social Media

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

- Greatest Demand and Potential

- Key details
  - Specialist equipment

- Social Media
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

- Sport Skills
  - Challenger workforce
  - Sport Specific focus
  - Skills coaching
  - Technique led syllabus

- 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

Location; Equipment; Facility

Requirement for training facilities at Levels 4/5

What NICAS provides

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

Sport Skills

Less generic, more individual coaching

What Jane wants

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

Opportunity for more female coaches

Community & People

Opportunity for training facilities at Levels 4/5

Opportunity for more female coaches

Health
Body image / physique
Increased performance
Motivational progress
Team working

Personal Development

Report p117
Summary
We’re here

- Sport specific initiatives
- Adventure & Wilderness
- Commercial facilities
- Outdoor learning
- Sport specific skills
Cross sport/activity initiatives

Social Connection

Urban & accessible

Participant focused initiatives; products; marketing

Engaging technology

The opportunity is here