

Getting Active Outdoors:

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



Outdoor Activity Market

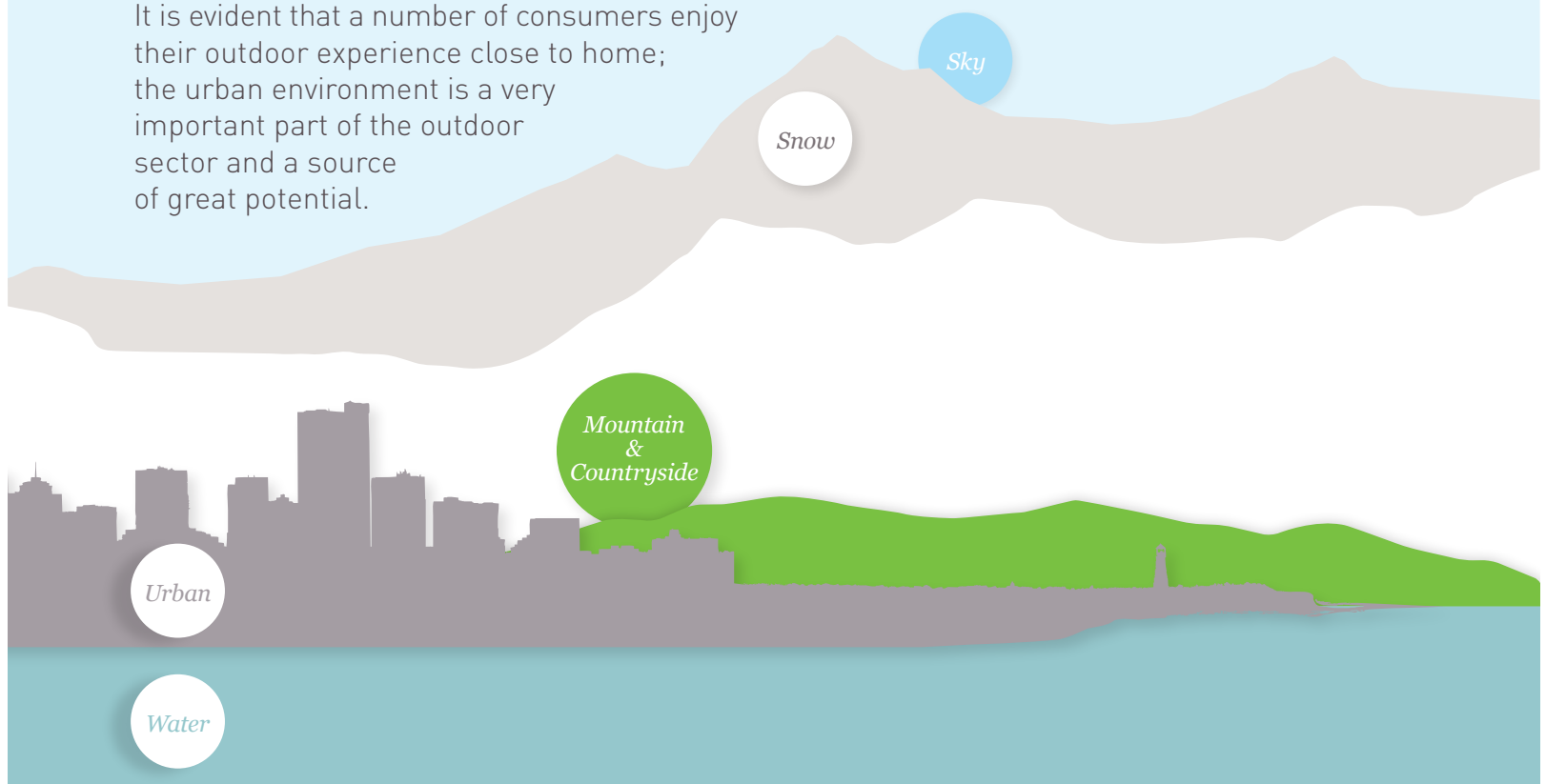
The research looks at the outdoors activity market, its scale, its stakeholders, the trends and opportunities and examines what motivates people to be active in the outdoors and how provision can be mapped against participation to identify gaps and opportunities.

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.

8.9m people are currently active outdoors

Of these 2.8m want to do more

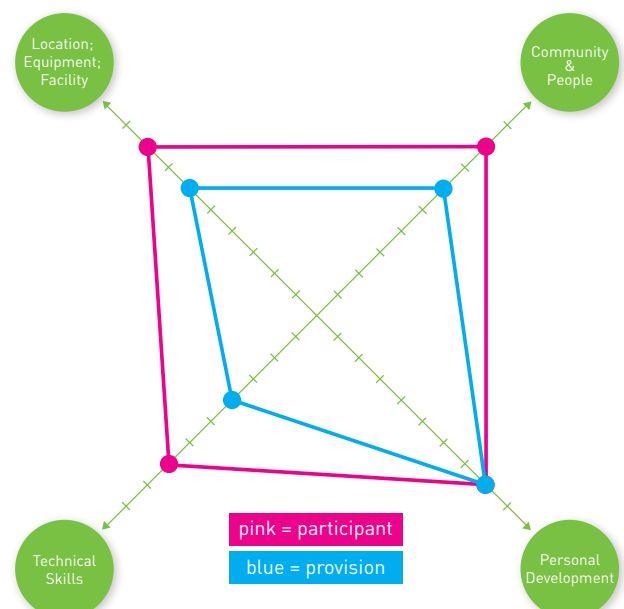
18.2m not currently active outdoors want to re engage and participate in the next 12 months



Knowing your participants is important and the experience they desire. Using insight to draw conclusions and help decision making is essential if it is to have value.

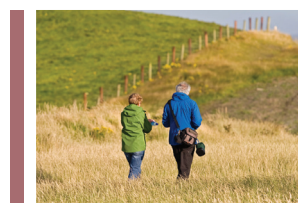
We have developed two tools to profile what is delivered and how it is delivered. These profiles can then be directly compared to the motivational requirements of the users to see how well the demand is supplied.

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.



The report covers the motivations for accessing outdoors activity, all of which vary across ages and life stages.

Understanding user personal preferences is a major element of the report. Our research found eight participant segment groups.



EXPLORER

Sense of being part of and exploring the natural world



CHALLENGER

Pushes self and focused on personal achievement/reaching a goal



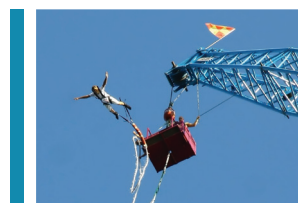
ADVENTURER

Enjoys the sense of adventure and pushing themselves physically



FREESTYLER

A way of life: self expression and self identity through association with activity



THRILL SEEKER

For an adrenaline kick



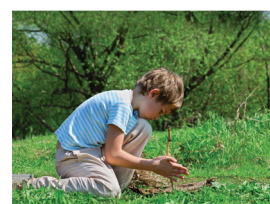
TRIBE MEMBER

Committed to their activity and take it very seriously



FITNESS IN NATURE

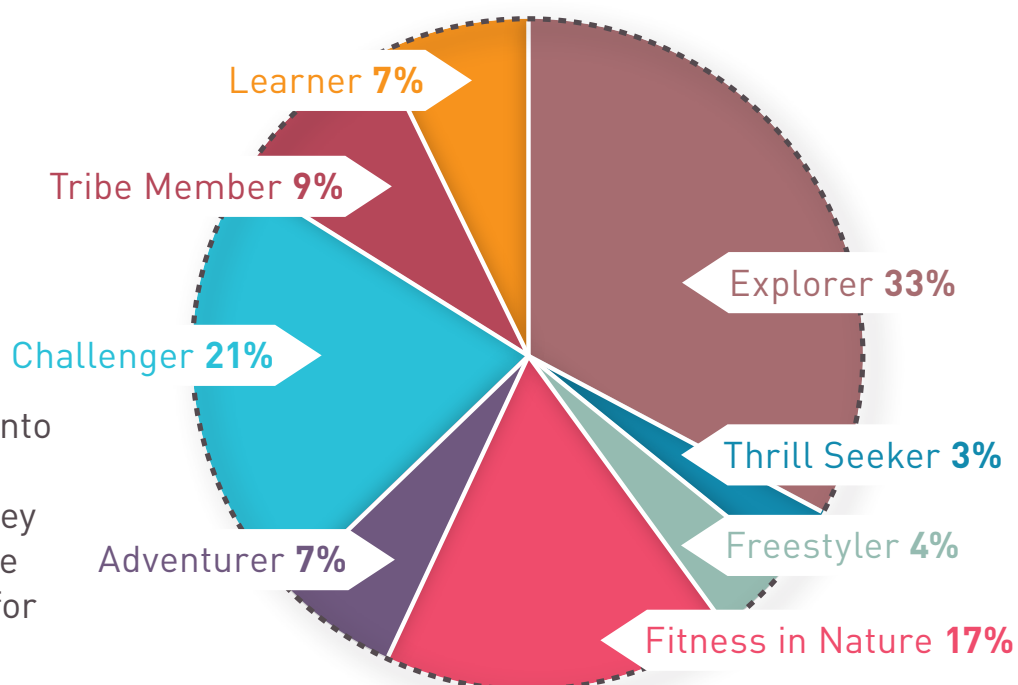
Chooses to keep fit outdoors for the fresh air and freedom



LEARNER

Physical activity is used as a means by which to learn/personally develop

Some people may fit into a different segment depending on what they are doing, or may have the same motivation for a range of activities.



*Monitor of Engagement with Natural Environment Survey MENE 2012-13

8.96m (20% of pop)
Active Outdoors (total)*

Did you know...

92% of people
take part in in the outdoors
to relax and de-stress

Thrill Seekers are
more likely to participate
in an **urban** outdoors
environment

Explorers
have the highest
proportion
of **female**
participants

There are over **9,000**
providers in the
outdoors sector



70 – 80%
of all outdoor users
feel participation
strengthens family
relationships

The report can be downloaded
www.sportengland.org/outdoors

We would like to extend an open invitation to one of our free workshops,
hosted by the Outdoor Industries Association and supported by Sport England,
to learn more about the information and tools in the report.

Please book via the website.



Footnote: The report was commissioned by Sport England and produced in partnership by the Outdoor Industries Association. We are excited by the opportunity to share this work with you so we can all use this valuable information to understand our customers better and grow the outdoor activity sector.