

Getting Active Outdoors



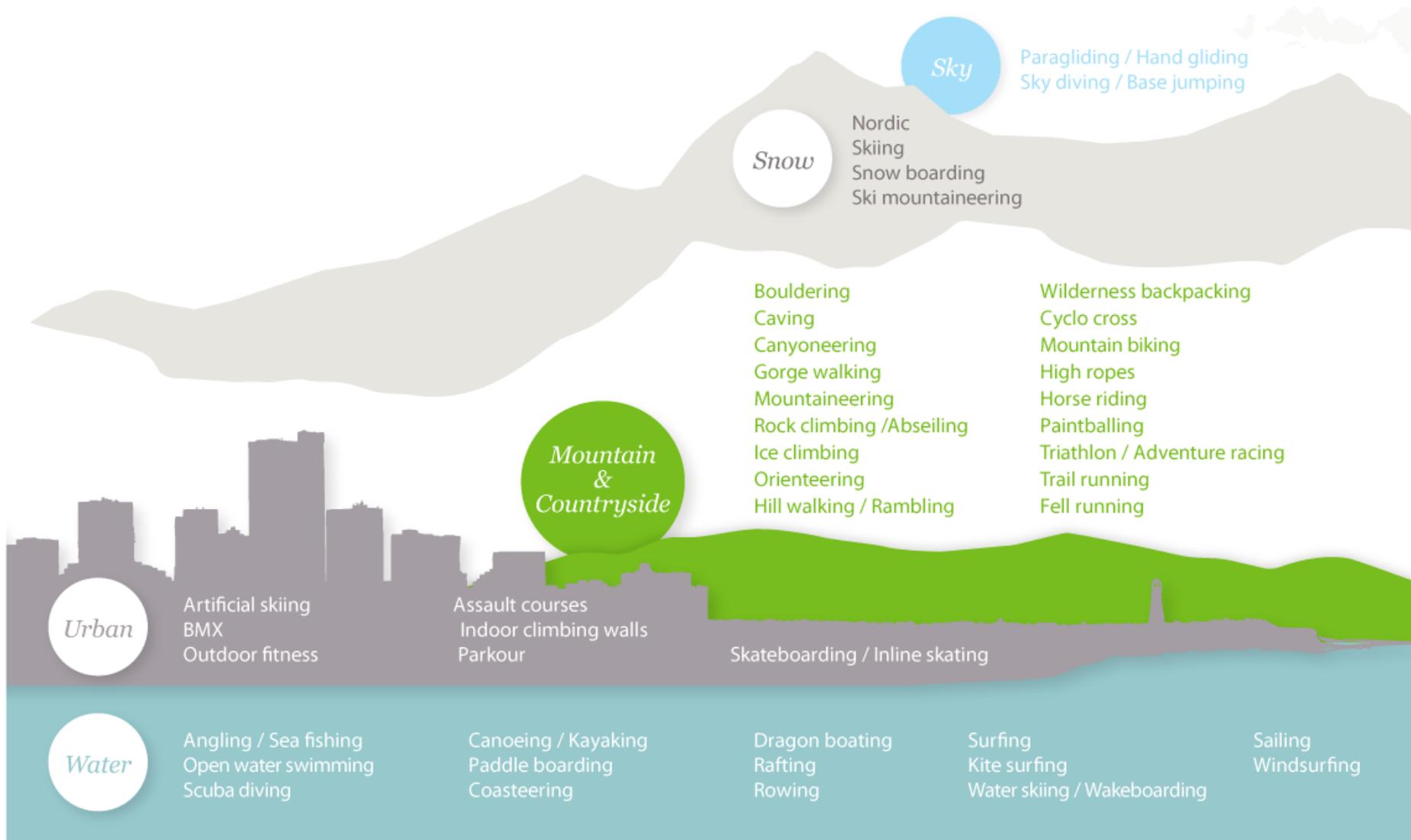
- Slide pack for dissemination of the outdoors insight by workshop delegates
- Getting Active Outdoors report page numbers are referenced in the bottom left corner of each slide.

Getting Active Outdoors: Insight



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

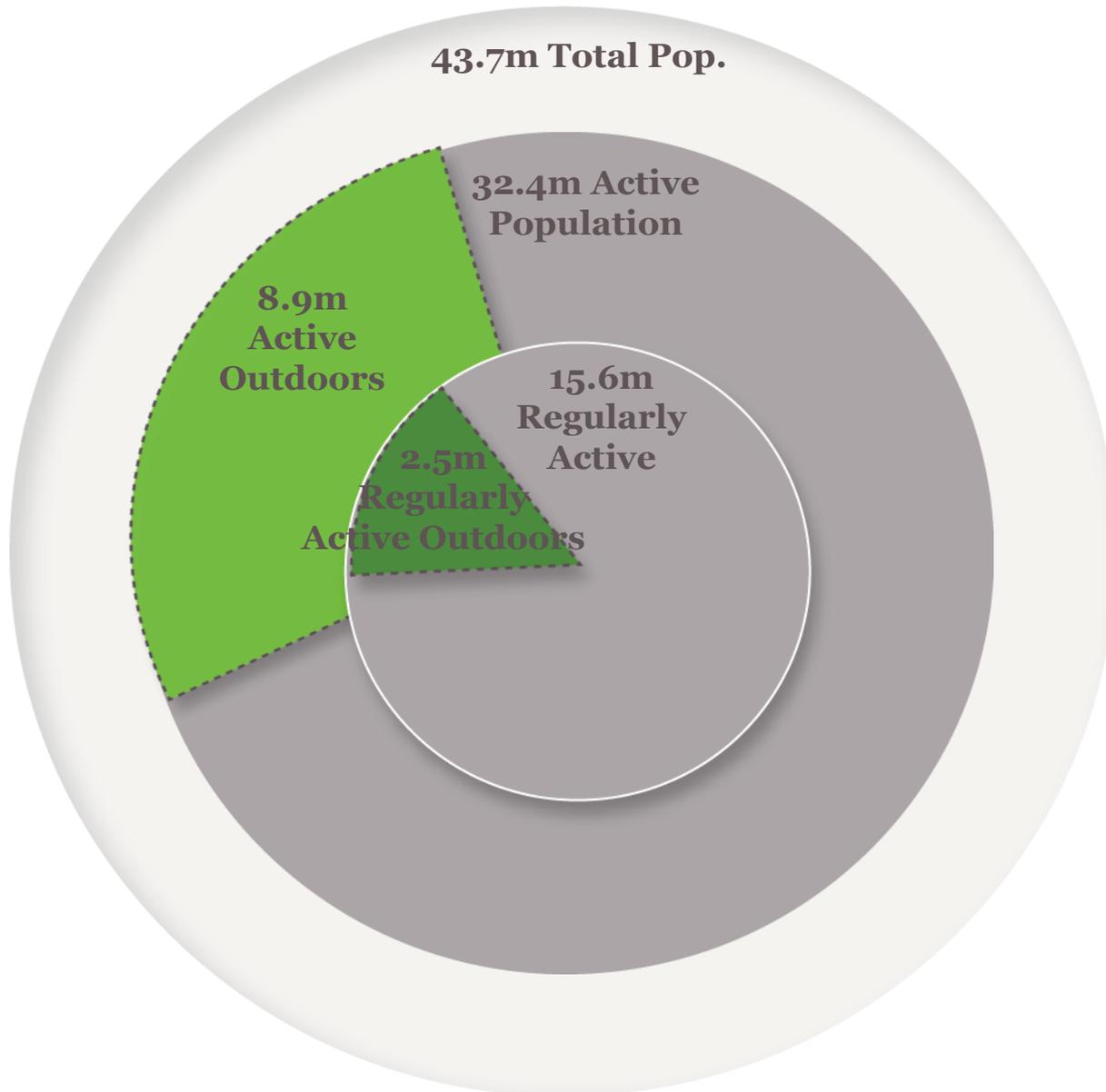
Definition of Outdoors Participation



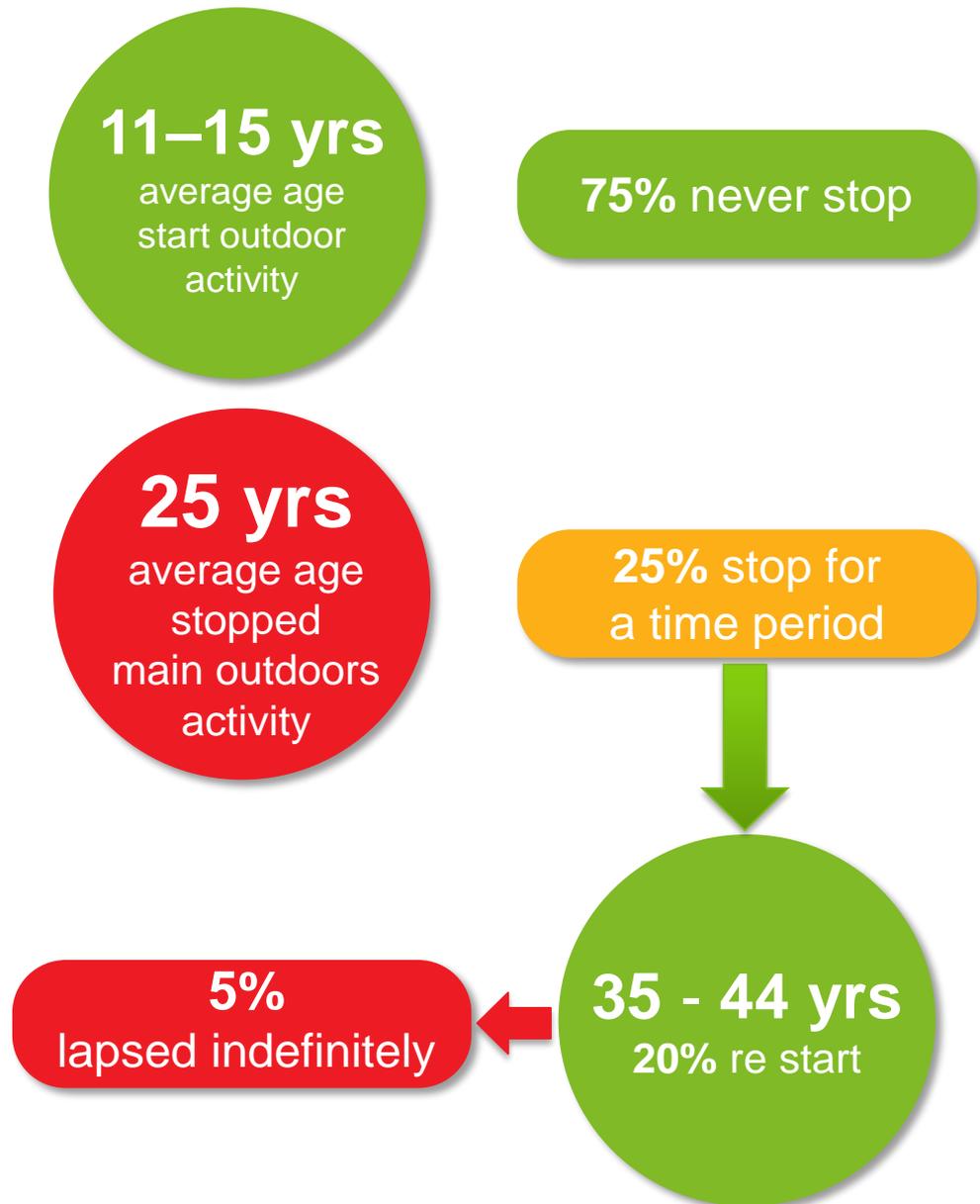
Participation:

Market, Lifecycle & Preferences

Outdoors Participation Market

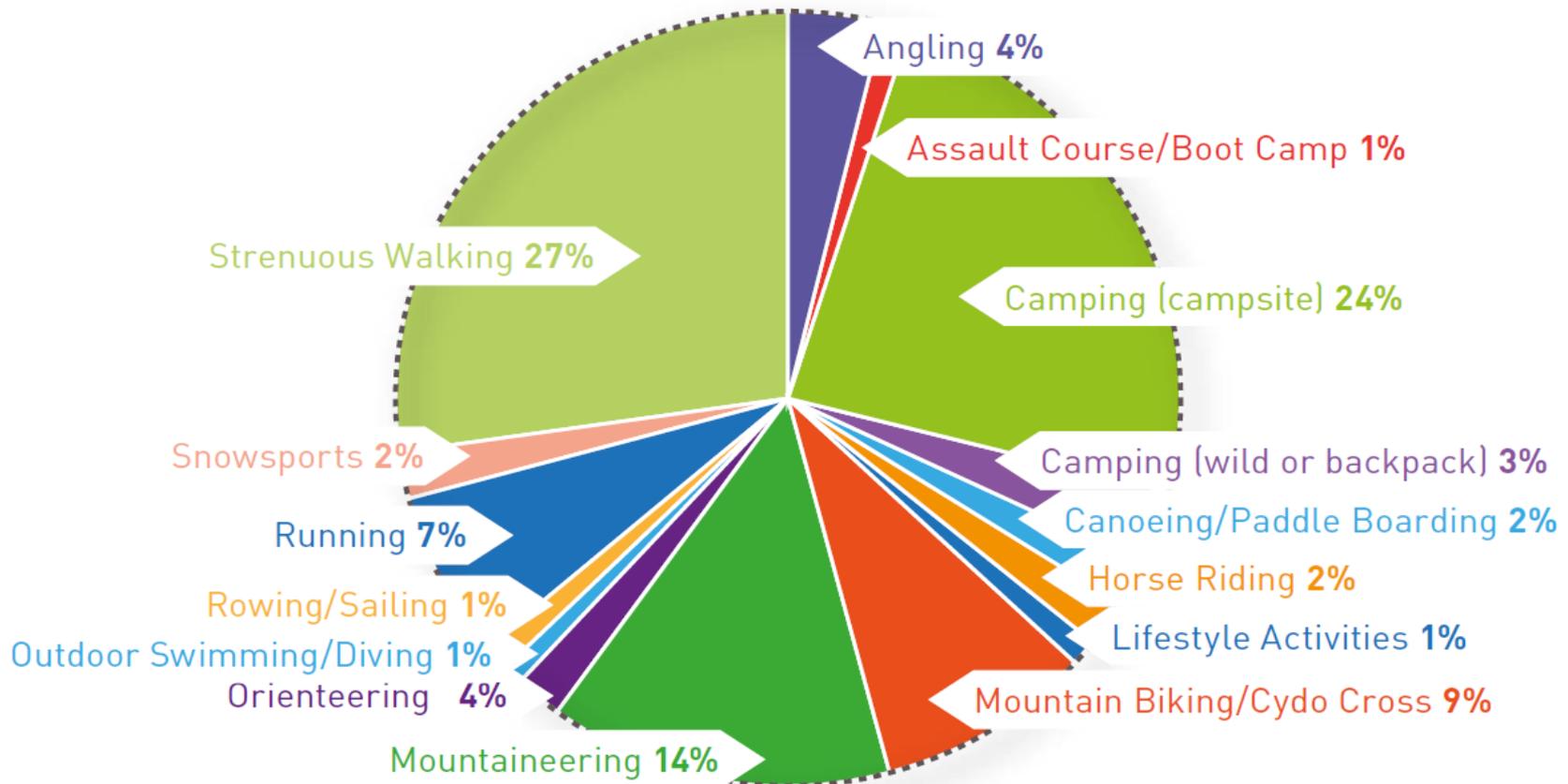


Lifecycle of Participation



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.



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

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

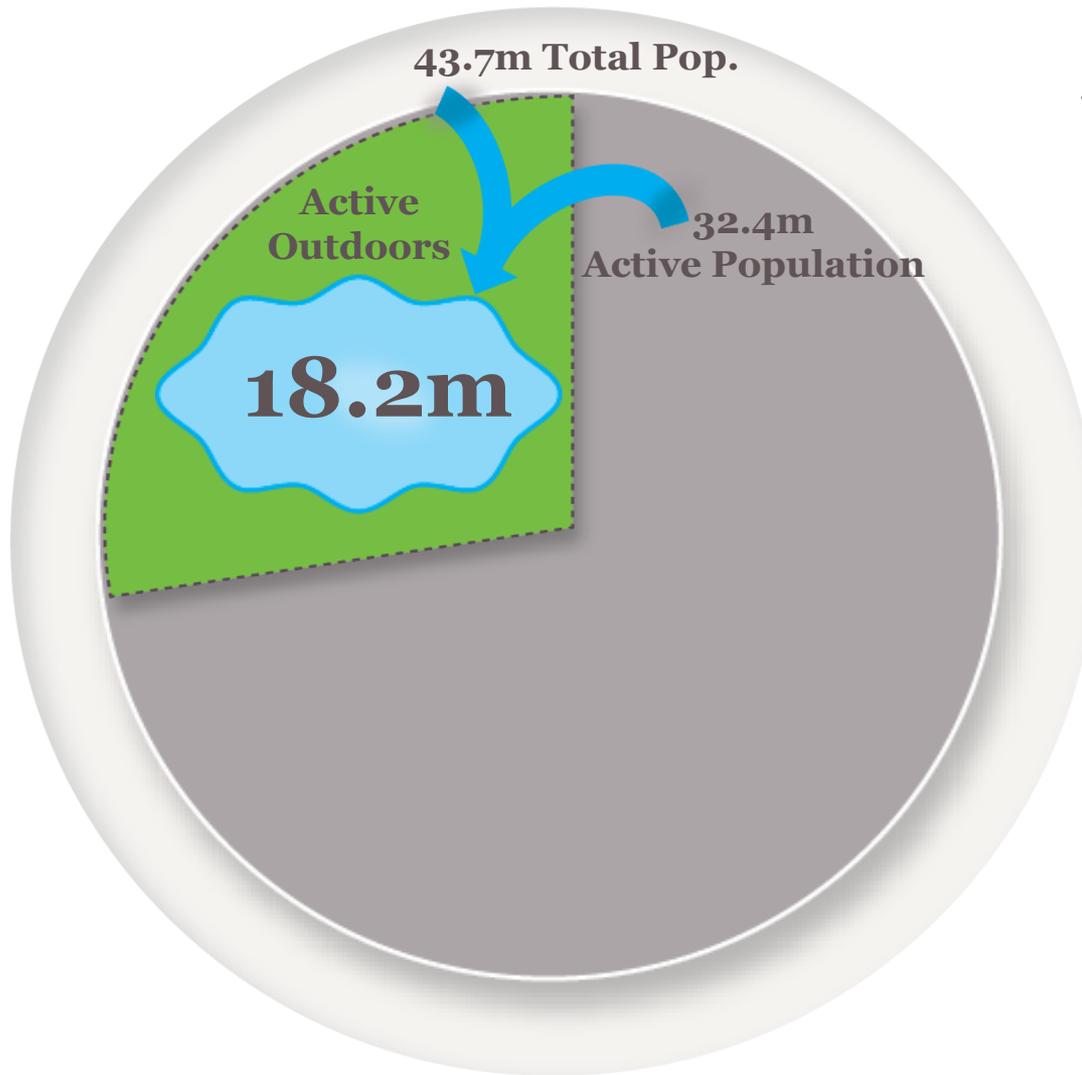
80% male

20's/ early 30s

Opportunity:

Growth Markets

New Participants



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



FREESTYLER

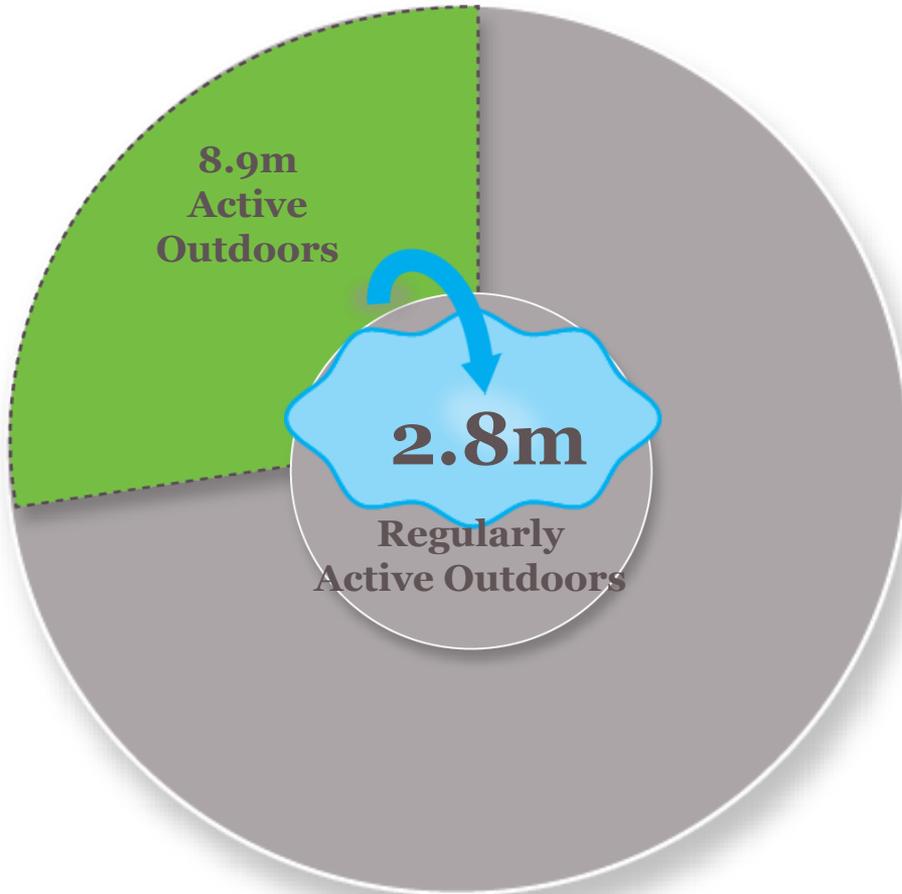


CHALLENGER



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

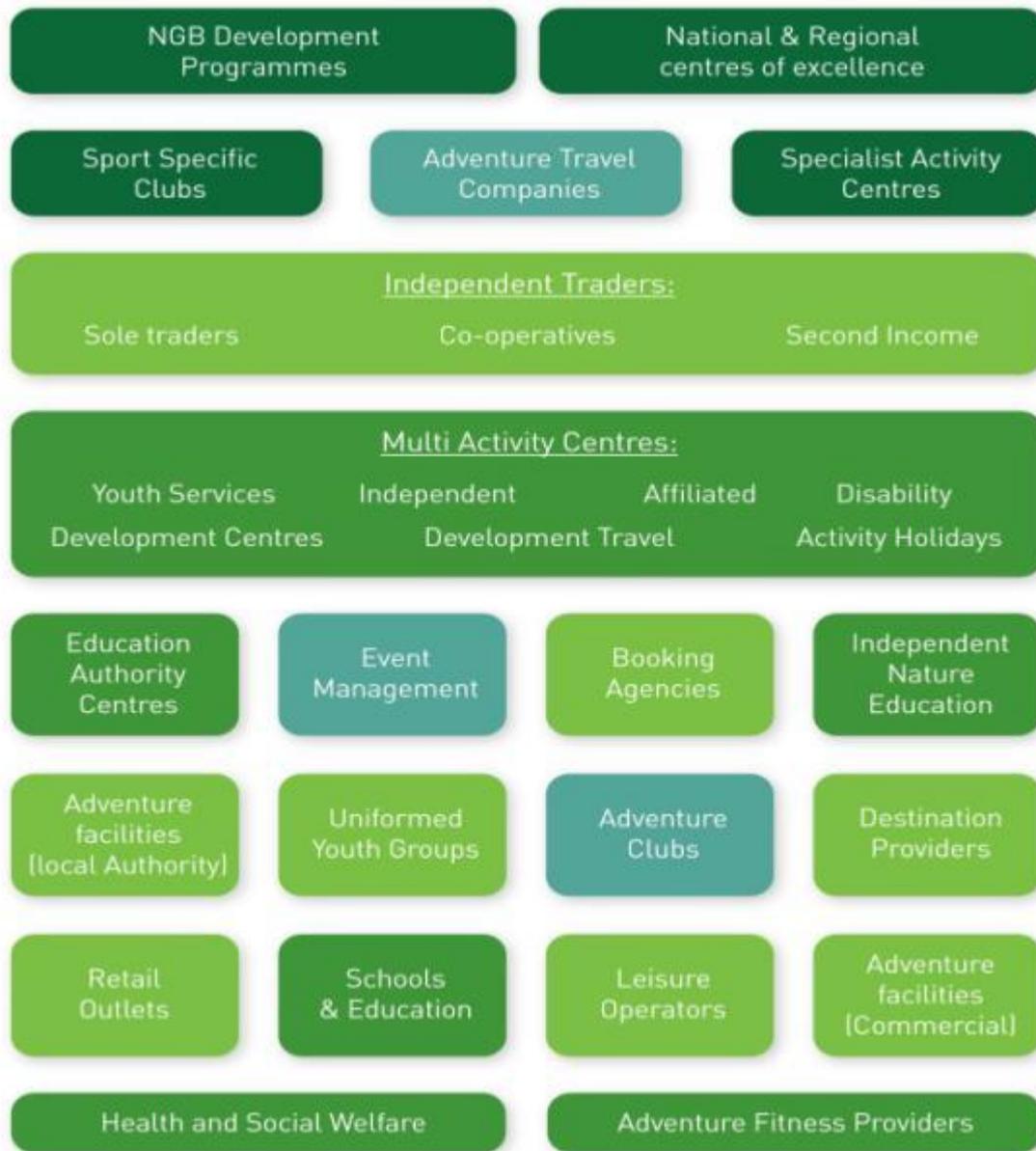
Stand Up Paddle boarding

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

Location;
Equipment;
Facility

Community
& People

Requirement for training facilities at Levels 4/5

Opportunity for more female coaches

What NICAS provides

What Jane wants

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

Sport Skills

Less generic, more individual coaching

Personal Development

Health
Body image / physique
Increased performance
Motivational progress
Team working

Summary

We're here





The opportunity is here