



Market Report

A Snapshot of your Marketing Sector

Outdoor Activities

This pack has been designed to provide information on setting up a business in the **Outdoor Activities** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **August 2025**.

What do I need to know about the Outdoor Activities market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ Sports facilities revenue is anticipated to climb at a compound annual **rate of 2.3% to £7.4 billion over the five years through 2024-25**. Industry revenue is expected to **grow further** at a compound annual rate of 3.2% over the five years **through 2029-30 to reach £8.6 billion**. Efforts made by the government to encourage sports participation, like Sporting Future and Towards an Active Nation, have improved attitudes towards sport, lifting demand for sports facilities. Investment in women's sports will also drive activity levels amongst women, benefitting the industry. (IBISWorld, *Sports Facilities in the UK*, September 2024).
- ◆ Over the five years through 2024-25, revenue is forecast to climb at a compound annual rate of 1.9% to £12.9 billion. Government schemes to tackle childhood obesity and investments of £300 million to enhance cycling tracks and footpaths are all estimated to accelerate sports participation rates, growing the industry's consumer base. **Over the five years through 2029-30, revenue is forecast to expand at a compound annual rate of 4.5% to reach £16.1 billion**. (IBISWorld, *Sporting and Outdoor Equipment Retailers in the UK*, March 2025).
- ◆ Industry revenue in Recreational & Sports Goods Renting & Leasing was projected to reach £1.1 billion in 2024, with annual revenue growth of 4.0% that year. From 2019 to 2024, the industry recorded a compound annual growth rate (CAGR) of 6.0%, and it's **expected to grow at a CAGR of 6.4% from 2024 to 2029**. Looking ahead, annual revenue will continue rising steadily, **reaching £1.5 billion by 2029**. (IBISWorld, *Recreational & Sports Goods Renting & Leasing in the UK*, August 2024).
- ◆ According to a Statista Consumer Insights survey Sports & Fitness, conducted in the United Kingdom in 2024, **24% of respondents who do outdoor sports stated that they participate in organized cycling clubs, leagues, or competitions**. 13% participated in Hiking, and 7% participated in Climbing, Horse riding or Mountain biking. 6% participated in Motor Sports or Shooting & Archery. (Statista, *Consumer Insights Sports & Fitness*, 2024).
- ◆ The national organisation for this industry is the [Outdoor Industries Association](#). Other industry bodies include [Scottish Outdoor Education Centres](#), the [National Outdoor Events Association](#), [Wild Scotland](#), [Sport Scotland](#), [Association of Play Industries\(API\)](#) and [Institute for Outdoor Learning](#).



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Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **Mintel – Sport and Gen Z, UK (June 2025).** Gen Z's interest in sport is highly social, with most participants (84%) playing regularly with family and/or friends. Three quarters of Gen Zs take part in sport, with almost two in five running. Football, tennis, badminton and basketball are the most popular competitive sports they play. Sport plays an important role in supporting Gen Z's health: more Gen Zs play sport than go to the gym and 91% of participants take part to maintain or improve their health/fitness. This preference for purposeful activity is reflected in the rise of competitive fitness events like Hyrox and the popularity of marathon running on social media.
- ◆ **IBISWorld – Sporting and Outdoor Equipment Retailers in the UK (March 2025).** Cycling's popularity surged during the pandemic due to its convenience and health benefits. The government's recent announcement of a substantial funding investment to enhance cycling infrastructure will likely sustain the growth of bike sales in the years to come. The growing popularity of festivals has led to a rise in sales of camping and hiking equipment, including sleeping bags, outdoor cooking gear, and walking boots. While revenue from fishing equipment remains stable, it holds a small share in the overall sporting goods market. The popularity of fishing among kids and urban fishing enthusiasts presents new commercial opportunities, with retailers introducing specialized equipment for this demographic.
- ◆ **Mintel – Leisure Centres & Swimming Pools, UK (August 2025).** Consumer spending at public leisure centres and swimming pools will continue to grow in 2025. This is despite facility numbers having fallen by approaching 10% over the last decade and is being driven by increased footfall as growing interest in health and exercise draws more people to leisure centre gyms and fitness-focused activities. Mintel's consumer research identifies increased participation in gym exercise, fitness classes, solo swimming and personal training during the year.

There are also a number of online resources you may find helpful:

- ◆ **Visit Scotland, [Outdoor Activities](#).** Recent reports on popular activities such as walking tourism, cycling and Astro-tourism, as well as useful links to other activity information.
- ◆ Online registration with the **National Library of Scotland** offers access to [COBRA](#) business opportunity fact sheets including *Outdoor Activity Centre*, and *Outdoor and Extreme Sports Instructor* which contain useful information on licensing and good practice, as well as industry updates.
- ◆ Government [statistics](#) on **Scotland's National Performance**, including indicators such as access to [green and blue space](#) and visits to the [outdoors](#) and Government [policy](#) on children's outdoor play and learning.

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How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#) , [Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**



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What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please contact us on info@bgateway.com or by calling **0300 013 4753**.

Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.



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How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) ["Find a Chartered Accountant"](#) tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk ["Licence Finder"](#) tool

Law Society of Scotland's ["Find a Solicitor"](#) tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

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You must not rely on the information in the report as an alternative to advice from an appropriately qualified professional. If you have any specific questions speak to your Business Gateway Advisor or consult an appropriately qualified professional.

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