



Market Report

A Snapshot of your Market 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 **September 2021**. If you find the information contained in this document useful, tell us about it! Send us feedback [here](#); we will use your comments to help improve our service.

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:

- ◆ The leisure market continued to feel the impacts of the COVID-19 pandemic as restrictions remained in force for much of the first half of the year. However, as rules and restrictions ease, more events and activities can take place and Mintel expects the value of the out-of-home leisure market (excluding foodservice and gambling) to **increase by 9%** in 2021 and to **fully recover** to pre-COVID levels in 2024. (Mintel, *COVID-19 and Out-of-home Leisure: A Year On - UK - April 2021*).
- ◆ COVID-19 has had a big impact on consumer attitudes with **70%** saying it had made them more aware of the importance of their physical health and **38% of exercisers** taking up a new physical activity since the start of the pandemic. Outdoor exercise is also set to remain more popular than it was before the pandemic, with **57% of exercisers** expecting to take part in outdoor exercise when the threat of the virus has passed, compared to 52% before COVID-19 (Mintel, *Exercise Trends, May 2021*).
- ◆ Demand for sporting and exercise goods contracted as physical stores were forced to close during but a strong recovery is expected and over the five years through 2025-26, industry revenue is forecast to increase at a compound annual rate of **3.7%** to reach **£10.7 billion**. Demand is being driven by an increase in the popularity of **cycling** and those aged **over 55** taking part in more exercise and outdoor activities. (IBISWorld, *Sporting and Outdoor Equipment Retailers in the UK*, February 2021)
- ◆ Households with children continue to be the largest market for the industry, accounting for **48.1%** of industry revenue in **2019/20**. Parents encouraging children to be more active are likely to engage in activities as a family. According to the 2018 National Travel Survey, 83% of children aged between 5 and 10 years old had access to a bicycle, and 69% for those aged between 11 and 16. (IBISWorld, *Sporting and Outdoor Equipment Retailers in the UK*, February 2021).
- ◆ The national organisation for this industry is the [Outdoor Industries Association](http://www.thoia.co.uk) (www.thoia.co.uk). Other industry bodies include, [Scottish Outdoor Education Centres](http://www.soec.org.uk) (www.soec.org.uk); the [National Outdoor Events Association](http://www.noea.org.uk) (www.noea.org.uk); [Wild Scotland](http://www.wild-scotland.org.uk) (www.wild-scotland.org.uk); [Sports Scotland](http://www.sportscotland.org.uk) (www.sportscotland.org.uk) and [Institute for Outdoor Learning](http://www.outdoor-learning.org.uk) (www.outdoor-learning.org.uk).

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** – Exercise Trends (**May 2021**). Due to the government imposed restrictions indoor venues were closed for a long period in 2020 and early 2021, despite the removal of many of these restrictions there has been a reluctance among some consumers to return to previous habits. As a result, the number of exercisers who expect to continue with outdoor workouts has risen. The pandemic has also seen interest in physical wellbeing rise among consumers.
- ◆ **IBISWorld** – Sports Clubs in the UK (**March 2021**). Scotland is home to the second highest number of sports clubs, with an estimated 12.8% located in the region. Surveys of households around the United Kingdom indicate that sports participation is higher on average in Scotland than other areas of the United Kingdom.
- ◆ **IBISWorld** – Sports Facilities in the UK (**March 2021**). Scotland is the second largest region for the industry, with an estimated 11.7% of industry establishments. The weather has played a key part in the evolution of sport in Scotland, with all-weather sports like football, rugby union and golf dominating the national sporting consciousness. As Covid-19 restrictions ease fans are expected to return in large numbers to watch live sport. Additionally, rising health awareness and new government policies designed to increase sports participation are likely to lift demand for public and private sports facilities over the next few years.

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

- ◆ **Visit Scotland**, *Outdoor Activities* (tinyurl.com/vgaufbd). Recent reports on popular activities such as walking tourism, cycling and Astro-tourism, as well as useful links to other activity information and **COVID-19** updates on the sector.
- ◆ 'Horizons' (outdoor-learning.org) and The 'Journal of Adventure Education and Outdoor Learning' (www.outdoor-learning.org/Journal), which are published by the IOL and feature outdoor activity news and developments, good practice guidelines and case studies.
- ◆ Online registration with the **National Library of Scotland** offers access to COBRA business opportunity fact sheets (tinyurl.com/tfsc253) including one on 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 space and visits to the outdoors – 58.9% of adults were estimated to have visited the outdoors at least once a week in 2018, up from 52.4% in 2017. (tinyurl.com/tawgx6y).
- ◆ Government policy on outdoor play and learning, which is focused on expanding outdoor learning spaces for children, may suggest an opportunity for operators in the outdoor activity market. (tinyurl.com/t93qram).

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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 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.

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.

We hope you find this Market Report useful and we'd love to hear your feedback [here](#).

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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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