



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 January 2018. 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 sports market appears to have recovered from a sudden dip in participation rates seen between 2014 and 2016 as levels of past-year activity returned to around two thirds of the adult population, with the rebound especially strong within the **25-34-year-old** demographic. Consumer expenditure on sports participation is expected to reach around **£4 billion** in 2017 (Mintel, *Sports Participation, UK, September 2017*).
- ◆ Major one-off events including the World Athletics Championship and cricket's Champions Trophy helped boost spectator sports attendances in 2017 but growth in market value to an estimated **£1.38 billion** was driven primarily by the performance of the domestic football segment. Some **68% of online adults** watched live sport during the 12 months to August 2017. (Mintel, *Spectator Sports - UK, October 2017*)
- ◆ Households with children has been the largest market for industry operators and is estimated to account for **47.6% of £8.2 billion revenue for 2016**. As parents encourage their children to become more active, families are getting involved in sport together. The number of bicycles being bought is increasing and a significant proportion of those belong to children. (IBISWorld, *Sporting and Outdoor Equipment Retailers in the UK, November 2017*).
- ◆ Mintel estimates that, in 2015, festival ticket sales (excluding secondary spend on food, drink and merchandise and also excluding secondary ticketing sales) accounted for around **£272 million**, up **6.1%** on 2014. (Mintel, *Music Concerts and Festivals - UK, August 2016*)
- ◆ Over **800,000 trips** were made by GB residents to Scotland's National Parks, accounting for **7%** of all GB overnight trips in Scotland and visitor expenditure of **£187 million**. **24%** of day visits in Scotland by GB residents involved undertaking outdoor activities. (Visit Scotland, *Scotland – The Key Facts on Tourism in 2015* tinyurl.com/kujp539, June 2016)
- ◆ The national organisation for this industry is the [Outdoor Industries Association](#). Other industry bodies include [Wild Scotland](#), [Scottish Outdoor Education Centres](#), [Institute for Outdoor Learning](#), the [National Outdoor Events Association](#), the [Association of Heads of Outdoor Education Centres](#) and [Sports Scotland](#).



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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, *Sports Participation, UK, (September 2017)*** The most common motivation for taking part in sport is to improve or maintain fitness. Any activity with an overt fitness focus (from gym and aerobics to running and cycling) will therefore appeal to the majority of participants who are driven by this goal – to the extent that 56% of those taking part in individual/keep-fit sport are motivated by getting or staying fit, compared to 44% of team/competitive sport players.
- ◆ **Mintel – *Spectator Sports – UK (October 2017)*** Sports fans look set to remain one of the most dependable segments of the leisure market’s consumer base, with the appeal of event attendance showing few signs of weakening, more high-profile international events on the hosting horizon and a widening range of media options promoting ever more frequent engagement with favourite teams and athletes.
- ◆ **IBISWorld - *Sporting and Outdoor Equipment Retailers in the UK (November 2017)*** Participation in sport strongly influences the performance of the industry. This also relates to general interest in sport, with events such as the FIFA World Cup and the Olympics creating spikes in British sporting participation rates. Sport participation is expected to increase in 2016-17.
- ◆ **Mintel – *Activity and Adventure Travel – UK (October 2015)*** Some 15% of consumers would like to take a cycling holiday, 13% would like to take some kind of boating holiday, 12% an expedition-type adventure travel holiday and 11% an equestrian holiday. In each of these cases the level of potential future interest is more than double the level of experience over the past five years.
- ◆ **IBISWorld - *Sports Facilities in the UK (September 2016)*** Scotland is the second-largest region for the industry, with an estimated **11.2%** of industry establishments. The temperate, oceanic climate has played a key part in the evolution of sport in Scotland, with all-weather sports like association football, rugby union and golf dominating the national sporting consciousness.

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

- ◆ **National Careers Service, *Job Profiles: Outdoor Activities Instructor*** (tinyurl.com/pmegkmj). Self-employment is the most common working pattern for outdoor activities instructors, accounting for 49% of those employed in this industry.
- ◆ **Visit Scotland, *Outdoor Activities*** (tinyurl.com/of8cvtt). Overview information and useful links on a range of outdoor activities in Scotland.

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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 [Retaining and Grow Your Customer Base](#) (tinyurl.com/c2fw4o4) will help you to identify who your customers are, how to use this information to sell more effectively and how to actively compete in your marketplace.

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 website, 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 Account](#)" 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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Updated by: Carla Bennett

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