



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 2024**. 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:

- ◆ Sports facilities' revenue has increased at a compound annual rate of 2.3% over the five years through 2023-24 to £7.4 billion, with growth of 2.2% in 2024-25. Revenue will grow at a compound annual rate of 3.2% over the five years through 2030-31 to £8,898.3 billion. The profit margin declined 12.7pp over the five years 2020 to 2025. Incentives relating to Government and major sporting events and economic easing will increase sports participation with revenue forecast to increase 2.2% in 2024-25. (IBISWorld, Sports Facilities in the UK, May 2024).
- ◆ Following a dip during the pandemic, the proportion of consumers attending live sporting and music events has now recovered to above the levels seen to prior to the outbreak. Despite 36% saying they plan to reduce spending on socialising/entertainment as a result of cost of living crisis and rising prices, the live events sector is holding up well. Original concept or premium leisure events may encourage some consumers to part with disposable income. Consumer concern over economic constraints and preference for less expensive venues remains, though demand is forecast to improve in years 2027-8. The majority of consumers (64%) foresee their leisure patterns to continue, with 23% planning for additional leisure time. (Mintel, Leisure Trends Dec 2023).
- ◆ Over the five years through 2029-30, industry revenue is expected to increase at a compound annual rate of 4.5% to reach £16.1 billion despite the effect of cost of living and pressures on disposable income. Government investment and initiatives are estimated to grow sport participation rates, and so increase the sector's consumer base. AI technologies and check-out automation is estimated to elevate footfall. Modern online experience is expected to improve revenue particularly for online-only retailers, reducing market share for physical retailers. In this mature market, the total of businesses is anticipated to increase at a compound annual rate of 1.3% over the five years through 2029-30. (IBISWorld, Sporting and Outdoor Equipment Retailers in the UK, May 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](#) and [Institute for Outdoor Learning](#).*

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.

- ◆ **IBISWorld - Sports Facilities in the UK (May 2024)**. Some of the main factors influencing industry demand are health consciousness, Government investment in sports facilities, increased venue use for concerts, consistent football ticket earnings, and a wider activity offering appealing to the growing elderly population. Competition stems from cheaper exercise alternatives such as budget gyms, running and home fitness.
- ◆ **IBISWorld – Sporting and Outdoor Equipment Retailers in the UK (May 2024)**. In general, rising levels of health consciousness have supported industry demand over the past five years. The success of significant sporting events such as men’s Euros in 2021-22 and FIFA World Cup 2022-23 sparked demand for sporting goods and equipment. Following Fraser Group’s acquisition of WIT Fitness, further market consolidation is forecast.
- ◆ **Mintel – Leisure Trends UK (December 2023)**. Social leisure activities were a priority for most demographics in 2023, with 47% of older people motivated to spend time with friends and family and 40% of 25-34 year olds. People’s leisure priorities indicate that 43% include spending time with family/friends with a strengthened focus on wellbeing with 53% want leisure activities for relaxation, 48% for fun, and 44% for keeping fit. With ONS projections that 40% of the adult population will be aged over 55 by 2028, the boost of this group’s spending power should benefit the leisure market. The challenge remains to persuade this demographic to expand into new leisure activities. Leisure operators may need to diversify their offering to provide all-in technology experiences though also disconnected options.

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 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 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 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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