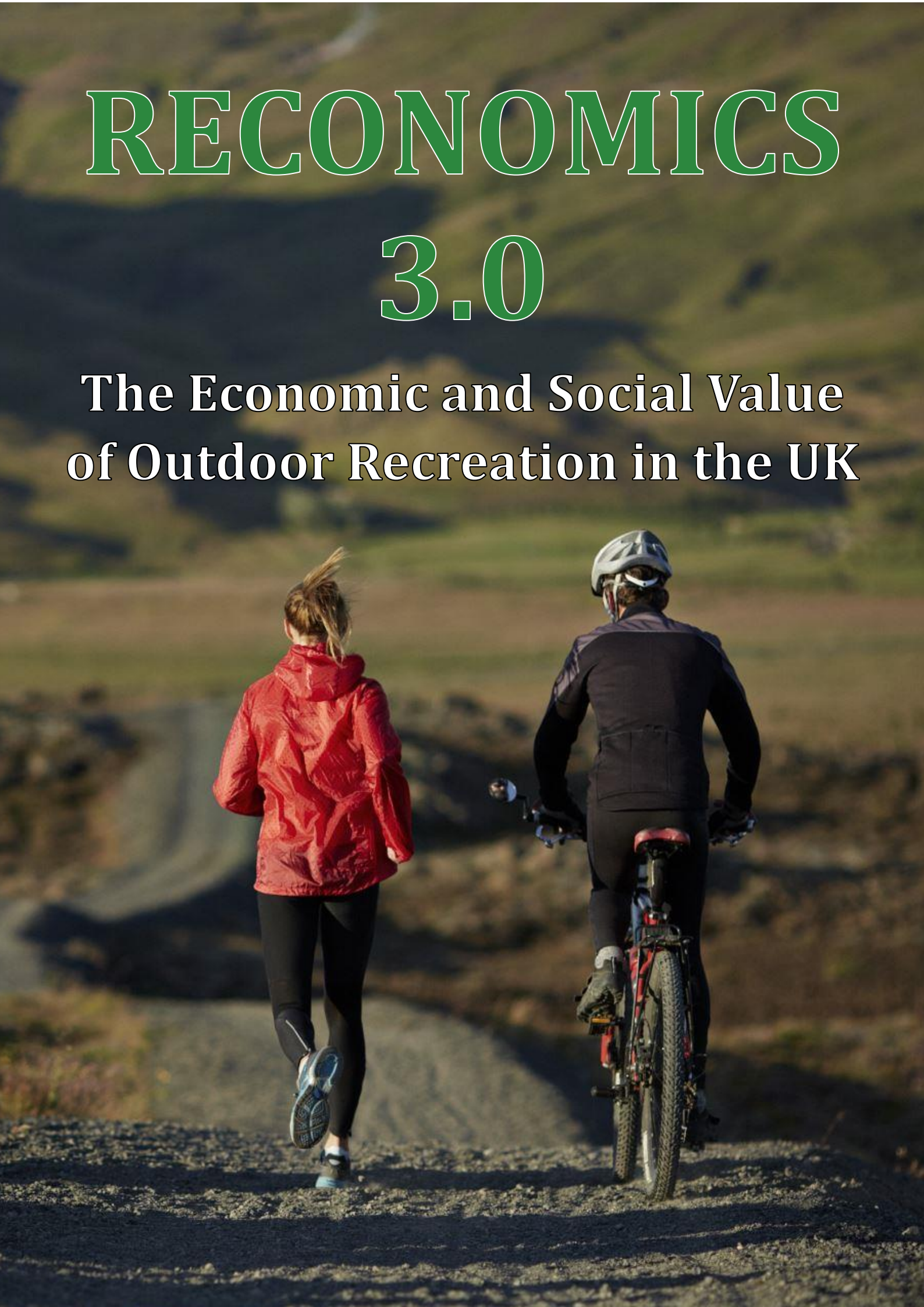
RECONOMICS 3.0

The Economic and Social Value of Outdoor Recreation in the UK



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Estimates, information and forecasts contained within this report are based on the data obtained at that time and the accuracy of resultant findings and recommendations is dependent on the quality of that data.

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1 Introduction

1.1.1 Reconomics 3.0 builds upon the Reconomics report (2014) and Reconomics Plus (2017) to give a timely update to the findings from previous reports. Thus, the Sport and Recreation Alliance (the Alliance), in partnership with members from the Outdoor Pursuits and Water Recreation divisions have worked with Leeds Beckett University towards the following aims:

- Producing an up-to-date evidence base that can be used by stakeholders in the outdoor recreation sector to articulate its overall impact to key audiences
- Benchmarking of progress from Reconomics 1.0 (2014) and Reconomics Plus (2017)
- Understanding the social and economic value of specific outdoor activities and participation trends

1.1.2 In the previous eight years numerous changes have impacted the outdoor recreation sector that necessitates an update from the previous reports. Brexit has now been (largely) implemented and has resulted in significant changes that have impacted the sector, including rising costs of equipment and materials imported from the EU, changes to the UK workforce, and challenges to regulations and directives to protect the environment. Many of these issues have been compounded by high inflation and the cost-of living crisis which may have impacted people's ability to engage in outdoor recreation.

1.1.3 The COVID-19 pandemic has had a complex effect on outdoor recreation. Lockdowns and fear of mixing indoors encouraged more people to turn to the outdoors for recreation opportunities, leading to a significant increase in public activity in natural spaces. Whilst some of this has dropped away, many people continue to value access to the outdoors for recreation and may have taken up new, or expanded existing, outdoor recreation activities. Since the COVID-19 pandemic, outdoor recreation has experienced sincere volatility, this period has been characterised by hard to predict demand for outdoor products and services as well as visitation numbers to outdoor recreation hotspots.

1.1.4 Wider political discourses and global challenges including climate change, rising obesity and physical inactivity, and increasing inequalities also shape attitudes and access to outdoor recreation. Changing working patterns and delayed retirement may affect volunteering, an essential aspect of the outdoor recreation sector, whilst increased awareness of well-being and nature's contribution to mental health is driving growth in interest in outdoor recreation activities.

1.1.5 Finally, activity across the sector to make natural environments more accessible to underrepresented audiences has led to increased interest and participation in outdoor activities from underrepresented groups: Black, Caribbean, Muslim, LGBTQ+, and disabled audiences. This is reflected in the recent 'Outdoors for All' manifesto which calls for getting 3.5 million people more active outdoors in the UK by 2030 and committing to 15-minute greenspace access for everyone. 'Gateway activities' for these audiences are particularly important. As the Outdoor Industry Association's 2015 report on Getting Active Outdoors, indicated gateway activities can be viewed as the accessibility pillars of outdoor recreation and the OIA outlines two in particular: 1) hillwalking and rambling 2) camping – 90% of respondents to the OIA's survey described both camping and hillwalking as linking to other forms of outdoor recreation.

1.1.6 This complex and changing environment provides many challenges and opportunities for the outdoor recreation sector. In order to advocate for the sector's importance and influence policy and decision making at local, regional and national levels, robust evidence is needed on the value of the outdoor recreation sector in both economic and social terms.

2 Strategic Context

2.1.1 In the UK, sport and physical activity is a 'devolved' matter, meaning three of the constituent nations of the UK, Northern Ireland, Scotland and Wales, each determine the levels and priorities for investment at their respective parliaments or assemblies. In England, such decisions are taken by the UK Government, based in Westminster.

2.1.2 Across all four of the UK's constituent countries, funding and strategic delivery is overseen by the 'home country sports councils'.

2.1.3 A summary of the strategic priorities for sport and physical activity for each of the four home countries is outlined below.

2.2 England

2.2.1 In England, 'System Partner' funding is from Sport England. 'System Partner' organisations are funded to deliver their own strategic objectives, which are aligned and complementary to the strategic objectives of Sport England. Sport England, in turn, is funded directly by HM Government, principally through the Department of Culture, Media and Sport (DCMS), to which Sport England must align its strategic objectives.

2.2.2 The objectives of Sport England and DCMS are outlined in two strategy documents: 'Uniting the Movement', and 'Get Active'.

Uniting the Movement – Sport England

2.2.3 Sport England outlined its 10 year vision and key priorities in Uniting the Movement[1]. The stated mission of Uniting the Movement is: *"We're here to invest in sport and physical activity to make it a normal part of life for everyone in England, regardless of who you are".* To support this Sport England aims to join forces on five 'big issues' with the greatest potential for preventing and tackling inequalities in sport and physical activity.

- **Recover and Reinvent:** Recovering from the biggest crisis in a generation and reinventing as a vibrant, relevant and sustainable network of organisations providing sport and physical activity opportunities that meet the needs of different people.
- **Connecting Communities:** Focusing on sport and physical activity's ability to make better places to live and bring people together.
- **Positive Experiences for Children and Young People:** An unrelenting focus on positive experiences for all children and young people as the foundations for a long and healthy life.
- **Connecting with Health and Wellbeing**. Strengthening the connections between sport, physical activity, health and wellbeing, so more people can feel the benefits of, and advocate for, an active life.
- **Active Environments:** Creating and protecting the places and spaces that make it easier for people to be active.

[1] https://www.sportengland.org/about-us/uniting-movement

Get Active – Department for Culture, Media, and Sport

2.2.4 DCMS outlined its strategy in 'Get Active'[2]. The strategy outlines three underpinning priorities for HM Government:

- Driving participation and addressing inactivity
- Strengthening the integrity of sport
- Making sport more sustainable

2.2.5 The priorities are measured against a number of critical targets:

- **Population-wide targets**
  a. Over 2.5 million more active adults
  b. Over 1 million more active children and young people
  c. Targets to reduce disparities in participation rates
    i. 1.4 million more active adults from those in NS-SEC 6-8
    ii. 0.7 million more active people experiencing one or more disabilities
    iii. 1.5 million more active adults aged 55+
    iv. 1.25 million more active women
    v. 0.19 million more active Asian adults
    vi. 0.09 million more active black adults
- **Local delivery**
  d. Increase activity rates in all parts of the country
  e. Decrease inactivity rates in all parts of the country
  f. Ensure at least 75% of Sport England place investment is committed to areas with the lowest levels of physical activity and social outcomes

2.3 Northern Ireland

2.3.1 Sports NI works in partnership with The Department for Communities to deliver Active Living, the sport and physical activity strategy for Northern Ireland[3]. The strategy has the stated vision of *"lifelong involvement in sport and physical activity will deliver an active, healthy, resilient and inclusive society which recognises and values both participation and excellence."*

2.3.2 The strategy identifies the following key themes:

- Recovering from the Impact of the Pandemic
- Promoting Participation, Inclusion and Community Engagement
- Promoting Excellence in Sport
- Promoting Partnership and Integration
- Providing Inclusive, Shared Spaces and Places
- Promoting the Benefits of Sport and Physical Activity

2.4 Scotland

2.4.1 To increase physical activity, the national strategy, Physical Activity for Health: Scotland's National Framework from the Population Health Directorate aims to create a more active Scotland[4].

2.4.2 The strategy outlines the Strategic Delivery Outcomes which are framed around eight evidence based sub-systems that constitute the physical activity system as a whole:

- **Active Systems**: Collaborative leadership and accountability strengthened and actively champions our vision of a more active Scotland through a whole systems approach.
- **Active Places of Learning**: Creating active environments, policies and opportunities across all places of learning.
- **Active Travel**: Sectors working collaboratively on action that prioritises active travel infrastructure and supports and encourages active travel behaviour.

[2] https://www.gov.uk/government/publications/get-active-a-strategy-for-the-future-of-sport-and-physical-activity/get-active-a-strategy-for-the-future-of-sport-and-physical-activity
[3] https://www.communities-ni.gov.uk/publications/active-living-sport-and-physical-activity-strategy-northern-ireland
[4] https://www.gov.scot/publications/physical-activity-health-framework/pages/13/

- **Active Places and Spaces**: Strengthening access and ensured sustainability of good quality public and green spaces, green networks, recreational spaces (including blue), play and sports amenities.
- **Active Health and Social Care:** Embedding the provision of appropriate physical activity opportunities and programmes between NHS Scotland, health practitioners and physical activity providers for different patient populations.
- **Active Communities:** Integrating communications and public education into both national and local strategies for physical activity ensuring collaboration and cross organisational messaging.
- **Active Sport and Recreation:** Sport and active recreation opportunities target people and communities where the need is greatest, and the participation rates are lower while also supporting those who are already active to remain so.
- **Active Workplaces:** Everyday physical activity is supported in workplaces in Scotland.

2.4.3 sportscotland also have a separate strategy, Sport for Life, with the vision of *"an active Scotland where everyone benefits from sport"*[5]. The strategy outlines the following outcomes for measuring performance:

- **Participate, Progress & Achieve:** Improve opportunities to participate, progress and achieve in sport.
- **Wellbeing and Resilience:** Support wellbeing and resilience in communities through physical activity and sport.
- **Stay Active:** Encourage and enable the active to stay active throughout life.
- **People and Places**: Improve our active infrastructure.
- **More Active:** Encourage and enable the inactive to be more active.
- **Physical Confidence and Competence:** Develop physical confidence and competence from the earliest age.
- **Inclusion:** Our commitment to inclusion underpins everything we do.

2.5 Wales

2.5.1 Enabling Sport in Wales to Thrive from Sport Wales sets out the vision of a Wales where everyone is active[6]. Within the strategy, six levels of strategic intent are outlined that shape the way Sport Wales works:

- **To be person centred:** The needs and motivations of the individual lead the delivery, whether just starting out, aiming to progress or striving for excellence on the world stage.
- **To give every young person a great start:** Every young person has the skills, confidence and motivation to enable them to enjoy and progress through sport; giving them foundations to lead an active, healthy and enriched life.
- **To ensure everyone has the opportunity to be active through sport**: Sport is inclusive and provides a great experience for all.
- **To bring people together for the long-term:** There is a collaborative, sustainable and successful sports sector, led by collective insight and learning.
- **To showcase the benefits of sport:** The impact of sport is evidenced, and sport's reach is fully understood, valued, showcased and celebrated throughout Wales.
- **To be a highly valued organisation:** Sport Wales is a respected organisation, striving to over achieve by delivering a first class service through our valued staff.

[5] https://sportscotland.org.uk/media/em0d3zo3/sport-for-life-full-document.pdf
[6] https://www.sport.wales/sport-wales-strategy/

3 Approach

3.1.1 To build a complete picture of the economic and social value of outdoor recreation, and the evolving landscape of engagement with this family of activities, the report is broken down into three distinct sections.

- **Engagement trends:** who is participating, in which activities, and how has this changed over the last decade.
- **Economic Value:** what is the value of this engagement in terms of economic activity, including jobs, the value of buying equipment to support activities, the value of accommodation and travel to outdoor recreation areas
- **Social Value:** what is the value of this engagement to the individual ('primary value', measured in wellbeing), and to society ('secondary value', measured in savings to the national health system).

3.2 Defining Outdoor Recreation

3.2.1 The term, 'Recreation', extends the word 'Recreate' which is to 'create something anew' (Hammit, 2004). Recreation is meant to re-create something anew in people lost during non-leisure time, the term implies the restoration of ability to function. Within its foundations, the concept suggests the restoration of wholeness of mind, spirit, and body (Hammit, 2004). Outdoor recreation includes activities that occur outdoors in both constructed, man-made, purpose-built environments (parks, canals, ski centres etc.) as well as in natural environments. However, it excludes traditional organised sports such as golf, football or rugby. Further, this report is concerned specifically with recreational and leisure activities and predominantly excludes the active travel phenomenon, although there is clearly overlap in these concepts.

3.2.2 Nonetheless, outdoor recreation encompasses all outdoor environments, including countryside; urban spaces; canals; rivers; and coastal areas. Previously, versions of Reconomics have defined outdoor recreation to align with the Active Lives Survey (see categories below).

Adults (aged 16+)

- Abseiling
- Angling
- BMX
- Canoeing
- Caving
- Climbing and bouldering
- Cycling for leisure
- Cyclocross
- Fell running
- Gliding, paragliding or hang gliding
- Hacking or pony trekking
- High ropes
- Hill and mountain walking, hiking, mountaineering
- Mountain biking
- Obstacle course
- Orienteering
- Other horse riding
- Parkour or free running
- Rollerskating, inline skating, rollerblading
- Rowing (on water)
- Running or jogging
- Sailing
- Scuba diving or snorkelling
- Skateboarding
- Snowboarding
- Surfing, board surfing, body boarding, kite surfing
- Swimming – open water
- Triathlon
- Walking for leisure
- Waterskiing

Children (aged 11-15)

- Adventure or outdoor sports
- Angling
- Climbing (inc indoors)
- Climbing (playground, garden / park)
- Cycling for fun/fitness
- Daily mile
- Horse riding
- Orienteering
- Running, jogging, cross-country
- Skateboarding, roller skating/ blading
- Snow sports
- Walking for leisure
- Water sports

3.2.3 Outdoor recreation occurs in a variety of landscapes and engages with environmental elements such as:

- Wind and air (gliding)
- Land both mountain and countryside (mountain sports or walking) occurring in 'green spaces' (woods, grasslands, etc.) in rural and peri-urban environments
- Water (surfing, canoeing, paddling) occurring in 'blue spaces' (canals, rivers, lakes, sea)
- Subterranean (caves, potholing)
- Urban (BMX, outdoor fitness, parkour)
- Snow (nordic skiing, snowboarding)

3.2.4 Outdoor recreational resources, although presumed to be natural, are often maintained and presided over by the private sector and public interest groups as well as trusts, and government bodies who advocate for have a statutory duty to maintain access and ensure safety. These 'recreational assets' can be considered below:

- Trails, paths, public rights of way, bridleways
- Climbing, bouldering, sport climbing and mountaineering routes (both winter and summer)
- Man-made attractions such as ski piste or high-ropes courses
- Access points to bodies of water such as river put-ins, beach areas or marinas
- National Parks, nature reserves

3.2.5 Without the above resources, and the public and private organisations or groups of stakeholders who maintain and oversee them, outdoor recreation would look very different than it does today. Thus, the outdoor recreation industry is characterised by thousands of disparate, yet interconnected industries, stakeholders, and small to medium enterprises which overlap (as captured by the OIA and Sport England in the Getting Active Outdoors report, 2015). These include:

- Education associations and networks for outdoor education
- Disability/access organisations
- Instruction and training providers + skills training
- Industry leadership and governance
- Retailers
- Professional trade associations
- Activity implementors
- Member organisations (consumer)
- Destination providers
- Tourism
- Social cohesion
- Industry specific campaigns
- Holiday outdoor activity providers

4 Outdoor Recreation Engagement Trends

4.1.1 Using data from Sport England's Active Lives Survey (ALS) and Active Lives Children and Young Persons Survey (ALS CYP), clear trends are evident in participation in outdoor recreation.

4.1.2 Walking for leisure consistently holds the highest participation rate among adults and those over 16 in England. The data shows a steady increase from 73.8% in 2015-16 to a peak of 82.1% during the 2020-21 pandemic period, when walking was one of the few accessible forms of exercise. Although there has been a slight decline since that peak, participation remains robust at 77.8% in 2022-23. This trend underscores walking's status as an accessible, low-barrier activity with broad appeal, making it a cornerstone of outdoor physical activity for the population.

4.1.3 Unlike walking, cycling for leisure has seen a marked decrease in participation over recent years. Initially stable at around 29.1% in 2015-16, cycling participation dropped sharply during the pandemic, falling to just 11.6% in 2020-21 and declining further to 11.1% in 2022-23. This downward trend is consistent across all age groups and highlights a potential long-term disengagement with cycling.

4.1.4 Looking at outdoor participation for children and young people (aged 5-16), some clear trends in who is most likely to participate in outdoor sporting activity are evident.

4.1.5 Socio-economic status remains a significant determinant of outdoor activity participation. Individuals from higher income households and those with higher educational attainment are consistently more likely to take part in outdoor activities, such as walking, cycling, and adventure sports. In contrast, participation rates among those from lower income brackets and less advantaged backgrounds are substantially lower. This persistent gap underscores the importance of addressing barriers such as access, affordability, and awareness to ensure equitable opportunities for all segments of the population.

4.1.6 This report finds that the gender gap in outdoor activity participation has narrowed over recent years, particularly in walking and some adventure sports. Women's participation rates have increased steadily, approaching those of men in several activities. However, disparities remain, especially in cycling and certain water sports, where men still participate at higher rates. This trend shows there has been progress in reducing gender-based barriers but also points to the need for continued efforts to foster inclusive environments and targeted initiatives to further close the gap.

4.1.7 Further analysis shows a shift in outdoor activity preferences, with notable growth in accessible and wellness-focused pursuits. Activities such as stand-up paddleboarding, outdoor yoga and fitness classes, trail running, wild swimming, and climbing have seen the most significant increases in participation. These activities appeal to a broad demographic, driven by trends in holistic health, social engagement, and a desire for adventure in natural settings.

4.1.8 In contrast, more traditional or resource-intensive activities have experienced marked declines. Road cycling, angling, horse riding, orienteering, and golf have all seen reduced participation, often due to barriers such as cost, access, safety concerns, and shifting leisure interests, particularly among younger generations. These trends underscore the importance of adapting outdoor activity offerings to evolving public preferences, ensuring that opportunities remain inclusive, affordable, and relevant to changing lifestyles.

5 Economic Value of Outdoor Recreation

5.1.1 In the Great Outdoor Opportunities: The Outdoor Industries Association (OIA)'s response to Sport England's 'Uniting the Movement' Strategy (2021), OIA indicates that **outdoor recreation is worth more than £22bn to the UK economy.**

5.1.2 In recent years there has been a growth in outdoor sports activities, with nearly **£13.7 billion spent on recreational and sporting services** within the UK in 2022 (Statista, 2023), with a **154% increase in spending on recreation and tourism seen between 2020 and 2022** (ONS, 2024). The benefits to people of natural area recreation are well known and embedded in policy initiatives such as Green Social Prescribing (de Bell et al., 2024) and Nature Connection.

5.1.3 Outdoor Recreation is a huge motivator for trips and visitor spend with the UK's tourism industry. In 2023, 117.4 million overnight trips were made in Great Britain, and 29.3 million trips (25% of the total) involved taking part in outdoor leisure activities. **£8.4 billion** (27% of the overall trip spend) was spent on trips involving outdoor recreation

5.1.4 In 2024, 26% of UK adults reported the opportunity to connect with nature as a key reason to visit green and natural spaces (Natural England, 2024). A survey by Aviva (2024) found 87% of the UK public believe that access to nature is important for health and wellbeing, strengthening the premise that opportunities to connect with nature can lower overall anxiety and cognitive anxiety (Martyn & Brymer, 2014).

5.1.5 Living near greener environments has been found to reduce mortality rates and improve mental wellbeing (Lovell, 2018). Even just spending just two hours outdoors per week increases the likelihood of people reporting good health and wellbeing (White et al., 2019). Potentially, this is due to living in close proximity to green spaces being associated with an increase in physical activity (Hillsdon et al., 2011) and thus people can derive a range of benefits from this such as reduced physical and mental illnesses and conditions such as heart disease and obesity. Notably, obesity alone is estimated to cost society £27 billion each year (Environment Agency, 2023).

5.1.6 It is because of this that the social and physical benefits of outdoor recreation and activity in green and blue spaces are seen as having the potential to positively impact public health expenditure in the range of billions (Environment Agency, 2023). For example, a Natural England study published in 2009 suggested that the NHS could save over £2 billion in treatment costs in England if equal access to quality green spaces was improved for all (Natural England, 2009).

5.1.7 What can be suggested from the above is that outdoor recreation, which is the present-day means of visiting, experiencing, accessing, and benefitting from natural environments is both a valuable and vital part of the UK economy and national health picture. The purposes of this report are to unpack this value and consider how natural environments and outdoor spaces accessed for the purposes of recreation adds economic value (e.g. through retail, the visitor domestic tourist economy, jobs, outdoor equipment manufacturing) but also how it adds social value through improved mental and physical wellbeing.

5.1.8 Independent visits to outdoor spaces have returned to growth in 2024, however, this remains below peak levels in 2020/2021. This could signal the end of a period of volatility and unpredictable demand for outdoor spaces which has been triggered by a multitude of factors such as the COVID-19 pandemic and cost-of-living crisis. Nonetheless, from Reconomics 1.0 in 2014, outdoor visits have reportedly increased by 32% over the past decade.

5.1.9 There is strong and healthy demand for overnight trips involving outdoor recreation within the UK, with 25% of all trips taking part in outdoor leisure activities. While overall bed nights declined across UK tourism, bed nights with outdoor recreation activities actually increased by 8%. This could be due to multiple factors such as: A) outdoor recreationalists being dedicated to their activities and having few replacements or don't consider alternatives B) typical outdoor recreationalists have above average income and are less affected by changes due to the cost-of-living crisis. This has resulted in £8.4 billion in expenditures by those having trips involving outdoor activities, 27% of the £31.3 billion total spent on overnight trips within Great Britain. Within just England, £6.7 billion of the overall trip spend (26% of total) was spent on trips involving outdoor recreation.

5.1.10 However, there is potential that the cost-of-living crisis seems to be impacting outdoor recreation demand when it comes to overnight trips with Great Britain and England both seeing a 12.0% and 15.2% decrease respectively. Despite this, across GB, the percentage of total nights with outdoor recreation increased by 8%.

5.1.11 In 2024, 64.4 million day visits with outdoor recreation as a main focus were taken across Great Britain (6.4% of total) and 56.3 million in England (6.2% of total) resulting in £2.57 billion in expenditure for all GB.

5.1.12 Despite day visits with outdoor recreation decreasing in Great Britain and England by 9.5% and 5.7% respectively between 2023 and 2024, total spend has significantly increased by 20% and 19.3% – fewer day trips are made, and visitors are spending more during their visits. This is likely the effect of the cost-of-living crisis.

5.1.13 National Parks within the UK typically welcome around 98 million visitors up from an estimated 90 million in 2017 (8% increase). However, only 7% of visitors to national parks come from outside the UK – this presents a policy opportunity for the tourism sector to support growth by working to displace tourism beyond the M25 and into the UK's areas of natural beauty and national parks. These visits generate £5.5 billion in economic value both within the national parks and surrounding areas, which is a 37% increase from figures reported in Reconomics 2.0 in 2017.

5.1.14 Further, visitation to national parks also supports a range of direct and indirect employment. The Yorkshire Dales NPA (National Park Authority) has estimated that visitors support over 5,000 jobs across the park's region, while the North York Moors NPA estimates a further 2,500 direct and indirect jobs. Locally, 10% of all employment is estimated to be related to recreation. Within Eyri, recent research has demonstrated an impact of £822.5 million generated by nearly five million day and overnight visitors. The report estimated that over half of these visitors come specifically for outdoor recreation, which clearly demonstrates how vital the sector is to Eyri and nearby communities such as Llanberis.

5.1.15 The total income associated with outdoor recreation within Wales is £1.6 billion and this supports over 31,000 jobs – 21% of all tourism jobs in Wales. This notes a significant contribution to rural economies within Wales.

5.1.16 Within Northern Ireland, outdoor recreation supports 4,800 full-time jobs and provides £131 million in gross value added annually. Consumer spending on outdoor goods totals £192 million annually within Northern Ireland, representing 26% of the total sporting goods market. Since 2011, the outdoor recreation sector in Northern Ireland has seen GVA (Gross Value Added) increase by 24% and employment rise by 36%.

5.1.17 Camping and Caravaning within the UK generates £12.2 billion annually in visitor expenditure. This represents a significant proportion of the UK's overall £214 billion tourism GDP, at roughly 5%, and supports a range of subsidiary industries. Further, this results in the creation of over 226,000 full time jobs across the UK.

5.1.18 National trails, such as the Coast-to-Coast trail, generate significant economic benefits to rural communities. It has been estimated that the Coast-to-Coast route generates £6.8 million in direct economic benefits to communities along the trail.

5.1.19 Boating and water sports contribute over £2.1 billion to the UK economy annually through tourism related expenditures with over 20.5 million people taking part annually across UK waterways. Furthermore, the British marine industry experienced 12.5% growth to £4.41 billion in 2022-2023.

5.1.20 It is estimated that shooting recreation contributes £3.3 billion in economic activity annually.

5.1.21 Angling is estimated to contribute £1.3 billion annually and supports between 13,600 and 16,300 jobs per year. While freshwater angling contributes an estimated £1.46 billion and supports 27,000 jobs.

5.1.22 Across Scotland's five ski resorts, the snow sports sector generates £3.4 million from overnight visits by nearly 90,000 visitors.

5.1.23 Spending on equipment for outdoor sport and recreation within the UK has been estimated to reach £10.13 billion, with 850€ million spent on more specialist outdoor equipment in 2022.

5.1.24 The estimated number of employees in adventure sports in the UK is 43,391 out of a total sport workforce estimated to be approximately 348,800. This represents 12.4% of the total sport workforce. It was estimated that a total of 5,044 people were recruited into this sector in 2022, which represents 9.6% of all recruitment in the sports sector in 2022.

5.1.25 Adventure sports within the UK generates £2.37 billion in GVA to the UK economy, representing over 13% of total GVA for the sport and physical activity sector. This represents a significant form of employment within the overall sector, with 9.6% of all sport and physical activity companies being labelled as adventure sport operators. Collectively, the turnover for these organisations is £2.38 billion annually, 4.2% of the total turnover for sport and physical activity. The most telling factor is that the sector is growing at 25%, nearly double the sector-wide average, which signals the potential for investment within the adventure sport niche sector.

5.1.26 Adventure sport organisations are highly distributed across the UK. Many are located within and around areas of natural beauty, nature reserves, and national parks at either inland or coastal cities. This distribution demonstrates how investment within adventure sport SMEs has the potential for nationwide impact, particularly in terms of employment.

5.1.27 In the future, further research into specific recreational sports activities could reveal interesting findings. For example, highlighted evidence on surfing revealed that surfing had an estimated £4.95 billion contribution to the UK economy by domestic surfers who averaged a direct spend of £2,980 on surfing related expenditures. As is often the case for communities who rely on domestic or international outdoor recreation visitation, these are vital contributions to rural areas and coastal communities across the UK.

6 Social Value of Outdoor Recreation

6.1 Who is Participating?

6.1.1 Altogether, a total of 34.3 million individuals, across all age groups, engage in outdoor recreation as part of their blend of activities. This includes over 1.9 million children and young people (aged 15 and under).

6.1.2 Importantly, the average 'share' of active minutes for adults who use one or more the outdoor recreation activities as part of their 'blend' is over 50% for adults. This means that, on average, adults engaging in at least one outdoor recreation activity spend around half their 'active time' engaged in outdoor recreation. For children and young people, this figure is closer to 25%.

6.1.3 Around two thirds of adult participants are male, and one third female. However, when looking exclusively at the 6.5 million people aged 65+ who engage in outdoor recreation, female participants narrowly out number males.

6.1.4 Further analysis of the adult population shows that outdoor recreation engages 2.76 million people from lower socioeconomic groups (NS SEC 6-8), and over 4.6 million people living with disability and long term health conditions. Over 700,000 adult participants are either pregnant women or parents of children under one year in age. Finally, over 1.35 million people from an Asian ethnic group participated in outdoor recreation.

6.1.5 Further, our study estimates a total of 1.4 million people volunteer their time in support of outdoor recreation.

6.2 How Much Social Value is Generated?

6.2.1 All this activity produces a total of **£46.8 billion** social value across both the primary (wellbeing) and secondary (health) measures.

6.2.2 Combined, the primary value elements represent a total value of **£41.8 billion.**

- Adult participation: £37.56 billion
- Children and young people participation: £1.8 billion
- Adult volunteering: £2.3 billion

6.2.3 In addition, participation and volunteering related to outdoor recreation produces savings to the health care system of valued at over **£5 billion**.

6.2.4 Areas of greatest impact include preventing:

- over 280,000 cases of Type II diabetes
- over 68,000 cases of coronary heart disease
- just under 50,000 strokes
- over 6,500 cases of cancer (across various forms)
- over half a million cases of clinical depression
- over 400,000 cases of backpain

6.2.5 Notably, outdoor recreation substantially over indexes on conditions that impact people aged 65+ including over 38,000 cases of dementia, and over 17,000 cases of hip fractures.

6.2.6 Further, the preventative dividend of outdoor recreation is estimated to prevent almost 15 million GP visits per year.

7 Conclusions and Next Steps

7.1.1 The paper evidences, in substantial detail, the impact and contribution of outdoor recreation to the UK.

7.1.2 At present, we estimate over 34 million people, including over 1.9 million children and young people engage in outdoor recreation as part of their activity blend. Notably, on average, outdoor recreation activities make up around 50% of the total active minutes for adults who engage with at least one of its constituent activities, and around 25% for children and young people. Further, an estimated 1.4 million people volunteer their time to support outdoor recreational activities each year.

7.1.3 Analysis of key participatory trends over the last decade show outdoor recreation represents a class of activities that are supporting growth in engagement with physical activity. This growth is experienced across age, gender, and social class segmentations. In 'hill walking', outdoor recreation has seen the largest growth in terms of participants of any activity post-Covid-19.

7.1.4 Further, as the UK represents an increasingly ageing society, outdoor recreation significantly over indexes for older people, meaning this group of activities represents a substantial opportunity as a means of maintaining the health of the population as average age increases.

7.1.5 In economic terms, these activities produce substantial dividends, with over £13.7 billion spent on recreational and sporting services within the UK, a 154% increase in spending on recreation and tourism seen between 2020 and 2022, and a total of £8.4 billion on trips associated with outdoor recreational activities (27% of the total spend on trips in the UK).

7.1.6 Further, the activity produces a substantial social value dividend of **£46.8 billion** social value across both the primary (wellbeing) and secondary (health) measures, including **£5 billion** in direct health savings derived from the benefits of participation and volunteering.

7.2 So what, what's next?

7.2.1 This paper set out to capture the scale and scope of the contribution of outdoor recreation to the nation. In so doing, this paper represents a substantial summation and collation of the available evidence pertaining to the significance of this contribution.

7.2.2 It is now for sector stakeholders, including the national governing sporting bodies, trade bodies, and others to use this evidence to make the case for outdoor recreation to be recognised and prioritised as a means of tackling societal challenges.

7.2.3 Inclusive of such challenges are the government's 'missions', a number of which are complemented by support and prioritisation for outdoor recreation.

- **Economic Growth:** outdoor recreation represents a huge a growing area of lifestyle for millions of people in the UK, which in turn facilitates the spending of money to support access and enjoyment of the various activities it encompasses.
- **Support for Environment / Net Zero:** Outdoor recreationists are proven to be keen environmentalists and typically support sustaining the quality and condition of the environment in which they practice their preferred activities.
- **Healthcare:** participation in outdoor recreation produces substantial savings to the UK health system. As society ages, outdoor recreation will support people to enjoy longer, healthier lives as they stay active through one of its component activities.

7.2.4 By playing into these and other priorities, the evidence presented within this document can serves as the platform from which to advocate for the UK's outdoor recreation sector, to ensure all people can access and enjoy the benefits of outdoor recreation.

Table 1: Social Value Outcomes of Outdoor Recreation in England – based on November 2022-2023 ALS/CYP data

PRIMARY VALUE OF OUTDOOR RECREATION

ADULTS (16+)

Wellbeing Values of Participation (Adults)

'ACTIVES'	Population	Activity Share	Multiplier	Impact (£ mil)
0 Characteristics	15,297,725	45.35%	£2,300	£15,957
1 Characteristic	10,252,696	52.71%	£2,500	£13,510
2+ Characteristics	2,362,597	56.85%	£3,800	£5,104
			'Actives' subtotal	**£34,571**

'FAIRLY ACTIVES'	Population	Activity Share	Multiplier	Impact (£ mil)
0 Characteristics	2,086,004	53.40%	£800	£891
1 Characteristic	1,830,081	57.43%	£1,100	£1,156
2+ Characteristics	583,918	57.93%	£2,800	£947
			'Fairly Active' subtotal	**£2,994**
			Wellbeing Values of Participation (Adults)	**£37,566**

Wellbeing Values of Volunteering (Adults)

FREQUENCY	Population		Multiplier	Impact (£ mil)
Weekly	860,530		£2,100	£1,807
Monthly	561,805		£1,000	£561
			Wellbeing Values of Volunteering (Adults)	**£2,368**

CHILDREN AND YOUNG PEOPLE (11-16 yr)

Wellbeing Values of Participation (CYP)

FREQUENCY	Population	Activity Share	Multiplier	Impact (£ mil)
'Actives'	1,440,329	23.98%	£4,100	£1,416
'Fairly Actives'	501,401	28.82%	£3,100	£447
			Wellbeing Values of Participation (CYP)	**£1,864**

SECONDARY VALUE OF OUTDOOR RECREATION

ADULTS (16+)

Condition / Area	Cases	Multiplier	Impact (£ mil)
Coronary Heart Disease (CHD)	68,656	£5,513	£406.78
Stroke	49,211	£7,234	£382.30
Type 2 Diabetes	281,289	£4,013	£1208.82
Breast Cancer	2,029	£19,634	£42.78
Colon Cancer	1,987	£16,317	£34.83
Bladder Cancer	502	£24,126	£13.01
Endometrium Cancer	619	£24,126	£16.02
Oesophagus Cancer	603	£24,126	£15.62
Gastric Cancer	388	£24,126	£10.07
Renal Cancer	422	£24,126	£10.94
Dementia	38,581	£11,939	£496.38
Clinical Depression	588,864	£2,002	£1267.04
Hip Fractures	17,294	£17,934	£333.09
Back Pain	417,767	£592	£265.55
Reduced GP Visits	14,937,615	£16	£256.68
Reduced Psychotherapy Services	15,524,821	£22	£366.80
Increased Risk of Injury	10,680	£5,488	-£62.95

Total Primary Value of Outdoor Recreation	**£41.79 billion**
Total Secondary Value of Outdoor Recreation	**£5.06 billion**
Total Social Value of Outdoor Recreation (England)	**£46.86 billion**

APPENDIX 1:

OUTDOOR RECREATION ENGAGEMENT TRENDS

1 Introduction

1.1.1 This section of the report investigates participation trends for outdoor sports and activities, drawing on Active Lives data, and using a consistent definition of outdoor sports with the other sections of the report.

1.1.2 The first section utilises graphs to show the trends in the number of adults and over 16's who participate once a week or more in outdoor sports and activities, followed by an analysis of outdoor sporting participation trends in children (between 5-16 years). A breakdown of trends in individual outdoor sporting activities is shown through tables in the appendix and an analysis of the growth/decline in participation in individual sports is also presented.

2 Participation in Outdoor Sporting Activities Among Adults and Over 16's

2.1.1 For simplicity, we have used groupings of activities for adults and over 16's that cover outdoor sporting activity. These are the following:

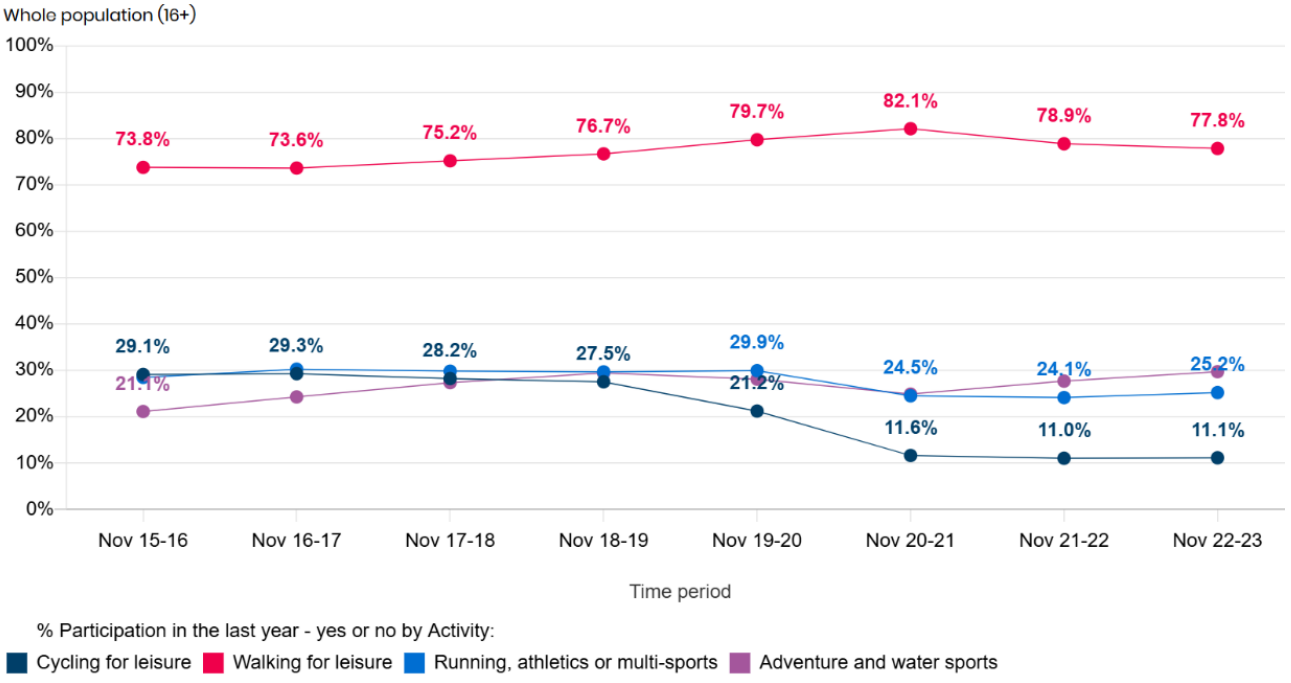
- Cycling for leisure
- Walking for leisure
- Running, Athletics or multi-sports[7]
- Adventure and water sports
- Angling
- Snowsport
- Equestrian

2.1.2 When displaying the data in graph format, these sporting activities have been split into two groups. One group being the sporting activities that attract typically high numbers of participants and the other group being those sporting activities which typically attract fewer participants. The latter is made up of Angling, Snowsport, and Equestrian.

2.2 Weekly Participation Across the Overall Population

2.2.1 The below graph shows the percentage of people in England aged 16 and over who reported taking part in typically higher participation outdoor sporting activities at least once a week over the past year, based on data from Sport England's Active Lives survey (November 2015 to November 2023).

Figure 1.01: Trends in higher participation Outdoor Sporting Activity (Ages 16+), 2015–2023 (Active Lives Data)



[7] Running, Athletics or multi-sports includes Track and field athletics, Running, Fell running, Triathlon, Modern Pentathlon and Obstacle course (e.g. Tough Mudder). It also includes the use of a Treadmill, an indoor sporting activity. However, we don't foresee this skewing the results, as participation levels for the use of a treadmill in the last 2 years has been an average of 15.5%.

2.2.2 Walking for leisure has consistently shown the highest participation rate among the activities analysed. From 73.8% in 2015-16, participation increased steadily over time, peaking at 82.1% in 2020-21, during the height of the pandemic when walking became one of the few accessible and permitted forms of exercise. While there has been a slight decline since then, participation remained high at 77.8% in 2022-23. This indicates that walking continues to be a vital, low-barrier form of physical activity with widespread appeal.

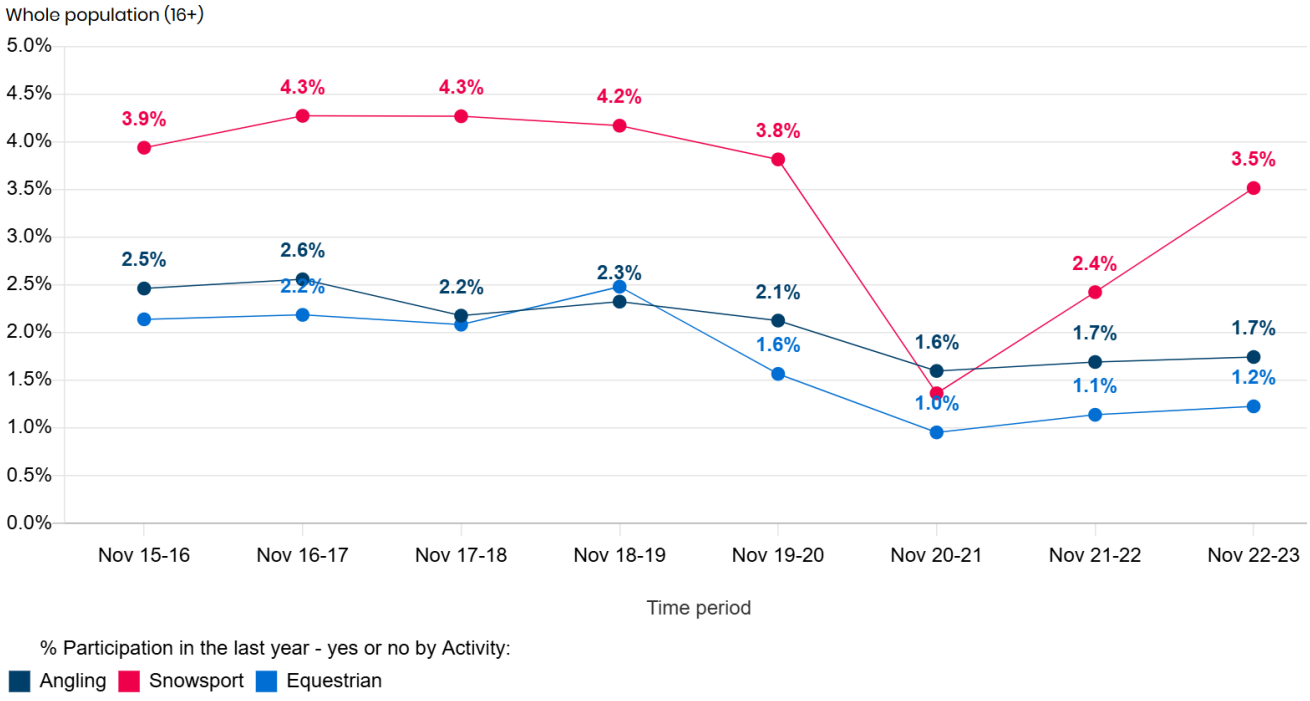
2.2.3 In contrast, cycling for leisure has followed a more complex trajectory. From 29.1% in 2015-16, participation remained stable until 2019-20, before seeing a significant drop during the COVID-19 period, falling to just 11.6% in 2020-21. This decline continued in the following years, reaching a low of 11.1% in 2022-23. This raises concerns about the long-term engagement with cycling and points to a need for targeted interventions to revitalise participation.

2.2.4 Participation in adventure and water sports has shown a generally upward trend over the eight-year period. In 2015-16, just over one in five adults (21.1%) reported engaging in these activities weekly. This figure steadily increased, peaking at 29.4% in 2018-19. Although there was a slight decline during the 2020-21 period (down to 24.9%), likely due to the impact of COVID-19 restrictions and limits to the number of participants, the data shows a clear rebound in the years following. By 2022-23, participation had reached its highest level yet at 29.7%. The overall upward trend, particularly the post-COVID recovery, indicates strong and growing public interest in adventure and water sports.

2.2.5 Running, athletics, and multi-sport activities show relatively stable participation, fluctuating within a narrow band between 24% and 29% across the period. There was a slight dip in 2020-21, consistent with pandemic impacts, but levels have largely recovered, reaching 25.2% in 2022-23. This steadiness suggests a resilient and loyal participant base, though growth has been modest.

2.2.6 These patterns underline both the resilience and the vulnerabilities within outdoor sport participation. While walking for leisure and adventure/water sports show robust and growing popularity, activities such as cycling have seen steep declines, signalling a need for renewed focus and promotion of the benefits of cycling. The data also highlights the importance of accessible, flexible, and inclusive opportunities that allow people to remain active across changing circumstances.

Figure 1.02: Participation in lower participation Outdoor Sporting Activity (Ages 16+), 2015–2023 (Active Lives Data)



2.2.7 The above graph shows the percentage of people in England aged 16 and over who reported taking part in typically lower participation outdoor sporting activities at least once a week over the past year, based on data from Sport England's Active Lives survey (November 2015 to November 2023).

2.2.8 Snowsport participation has remained relatively low but stable over the eight-year period. Rates peaked at 4.3% in both 2016-17 and 2017-18 before gradually declining to 3.8% by 2019-20. The most significant drop occurred in 2020-21, falling to just 1.4%, largely due to the pandemic's impact on international travel and access to alpine facilities. Since then, participation has begun to recover, reaching 3.5% in 2022-23. However, levels remain below their pre-pandemic peak. Factors such as seasonal limitations, high cost, and geographic accessibility appear to continue to restrict higher participation levels.

2.2.9 Equestrian participation followed a relatively consistent trend from 2015 to 2019. A notable decline occurred during 2020-21, with rates dropping to 1.0%, the lowest among the three activities during the pandemic. This likely reflects the disruption of in-person activities and facility closures during the pandemic. While participation has seen some recovery since, rising slightly to 1.2% in 2022–23, it remains well below levels in the earlier reported years. The data suggests that although there is a dedicated community for Equestrian, recovery has been slow, possibly due to cost or limited access to facilities.

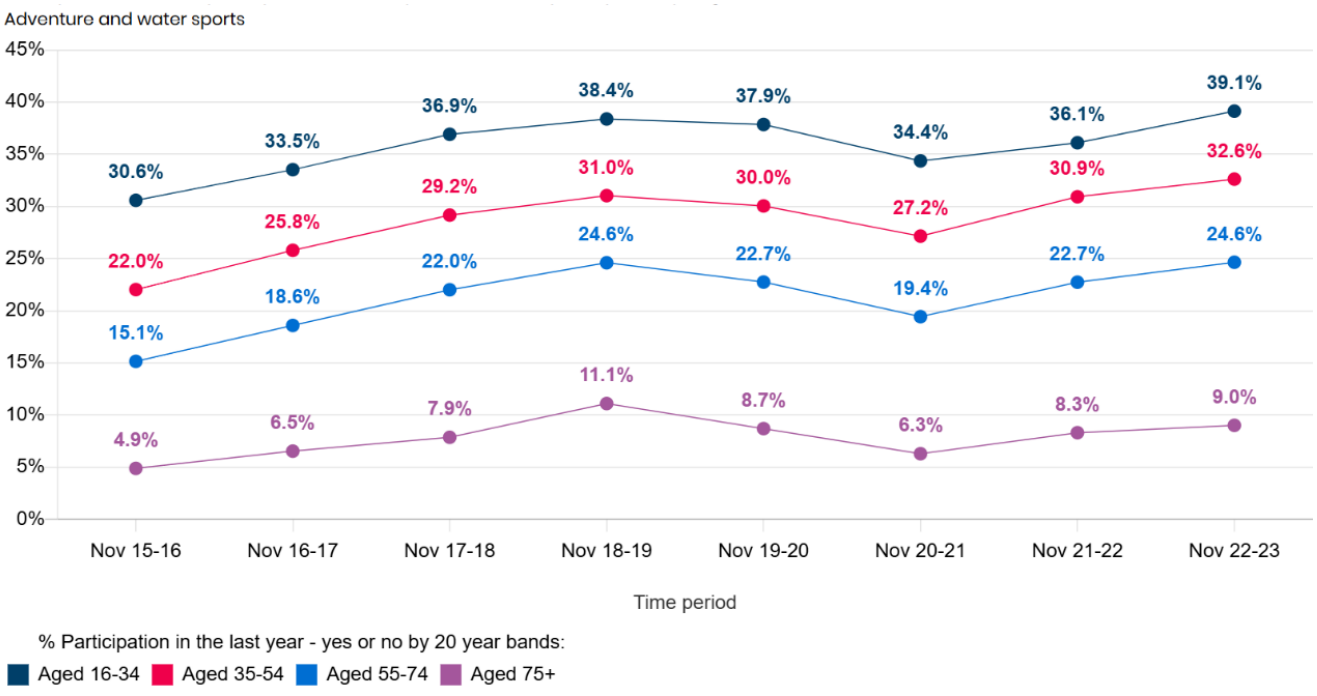
2.2.10 Angling has also seen modest but generally declining participation across the period. Starting at 2.5% in 2015-16, participation dipped slightly and fell more sharply in 2020-21 to 1.7%. While there has been a small recovery, Angling has not returned to pre-pandemic levels. This downward trend suggests a need to re-engage current and potential anglers, especially younger participants, and to tackle barriers such as licensing, equipment cost, and perception issues around the sport.

2.2.11 These trends highlight several key implications for the future of smaller outdoor sports. All three activities: Snowsport, Equestrian, and Angling face ongoing challenges around accessibility, affordability, and visibility, which limit wider public engagement. The slower post-COVID recovery compared to more mainstream sports suggests that these activities require targeted support to regain momentum. For Angling and Equestrian introducing more entry-level and community-led affordable opportunities could help rebuild participation. Additionally, addressing the perception of exclusivity and geographical or financial barriers in these activities could foster more inclusive growth.

2.3 Age

2.3.1 For this section, the sporting activities that show the most visible and notable trends have been focused on for the trend analysis.

Figure 1.03: Trends in Participation in Adventure and Water Sports by Age (Ages 16+), 2015-2023 (Active Lives Data)



2.3.2 This graph illustrates participation trends in adventure and water sports across four age groups from November 2015-16 to November 2022-23. The data reveals some clear patterns about which age groups are most likely to take part in these activities and how participation has shifted over time.

2.3.3 The 16-34 age group consistently leads in participation, starting at 30.6% in 2015-16 and rising to 39.1% by 2022-23 despite a slight dip during the 2020-21 period. This demonstates that younger adults are the most engaged in adventure and water sports, and their interest has grown over the years, bouncing back quickly after pandemic disruptions.

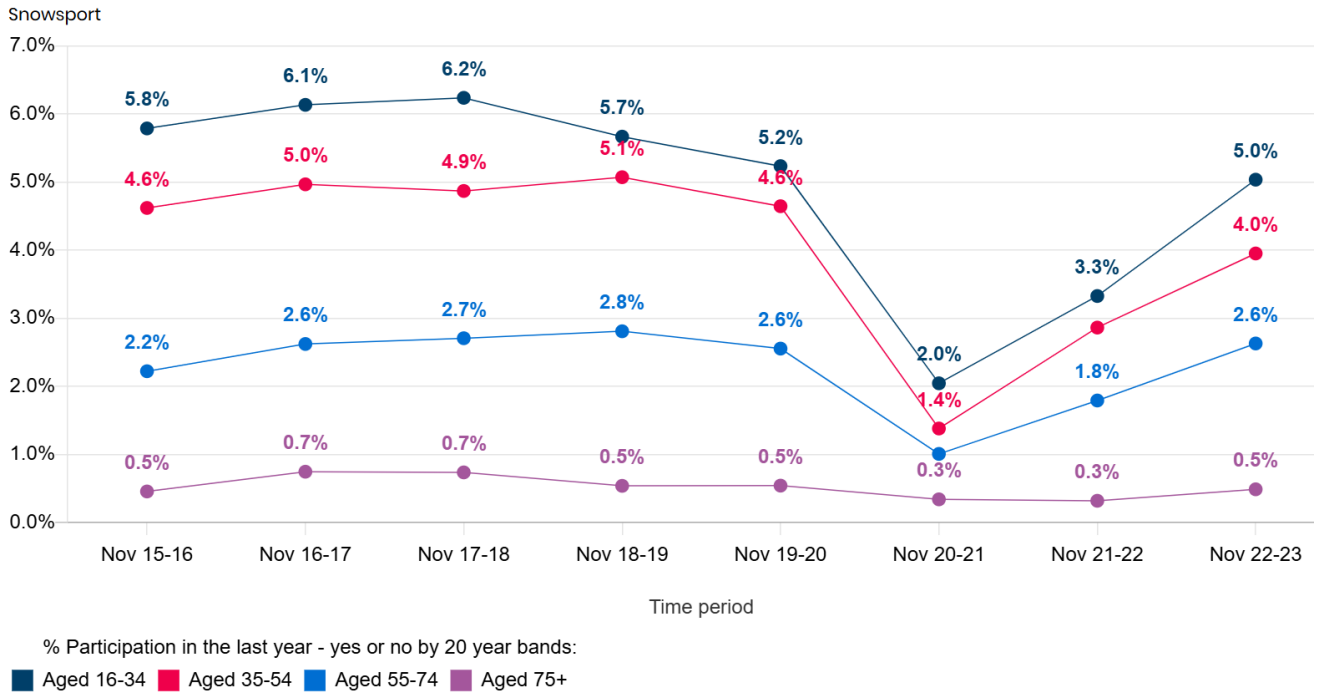
2.3.4 The 35-54 age group also shows steady involvement, increasing from 22.0% to 32.6% over the same period. Their participation mirrors the overall pattern: gradual growth, a pandemic-related dip, and a subsequent recovery. This indicates that middle-aged adults are also embracing these activities, with participation rates climbing significantly in recent years.

2.3.5 For the 55-74 age group, participation is lower but still shows a positive trend, moving from 15.1% to 24.6%. While their rates are behind the younger cohorts, the steady increase suggests that adventure and water sports are becoming more appealing to older adults, possibly reflecting changing attitudes toward active lifestyles later in life.

2.3.6 The 75+ age group has the lowest participation, ranging from 4.9% to 11.1%. There's a modest upward trend, but the numbers remain comparatively small. This could be due to physical limitations or less interest, but there is a gradual rise which hints at a slow but growing engagement among the oldest age group.

2.3.7 Overall, the graph highlights a broadening appeal of adventure and water sports, especially among younger and middle-aged adults. The data suggests that these activities are becoming more popular across all ages, with the strongest growth being among those under 55. This could have implications for how providers market and design adventure and water sports experiences, with opportunities to further engage older adults and capitalise on the sustained enthusiasm among younger people.

Figure 1.04: Trends in Participation in Snowsport by Age (Ages 16+), 2015–2023 (Active Lives Data)



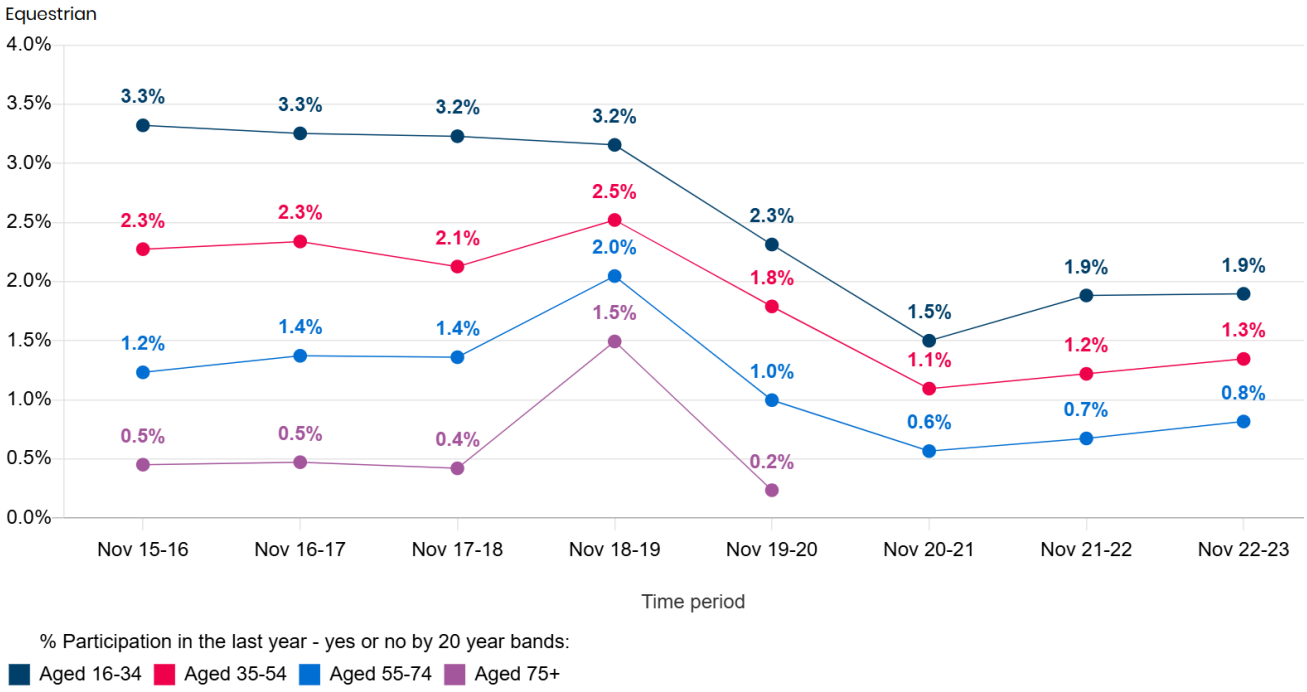
2.3.8 This graph shows how participation in Snowsport has changed over time across different age groups. The data spans from November 2015-16 to November 2022-23 and breaks down participation rates into four age bands: 16-34, 35-54, 55-74, and 75+.

2.3.9 The most noticeable trend is that the 16-34 age group consistently has the highest participation rates, peaking at 6.2% in 2017-18 before declining to 2.0% in 2020-21, likely due to the COVID-19 pandemic. After this decline, participation rebounded to 5.0% by 2022-23, although it hasn't fully returned to pre-pandemic levels. The 35-54 age group follows a similar pattern, with participation rates hovering around 4.6%-5.1% before the pandemic, falling sharply to 1.4% in 2020-21, and then recovering to 4.0% in 2022-23.

2.3.10 Older age groups show much lower participation overall. The 55-74 age group maintains rates between 2.2% and 2.8% before the pandemic, drops to 1.8% in 2021-22, and recovers slightly to 2.6% in 2022-23. The 75+ age group consistently has the lowest participation of all age groups, fluctuating between 0.3% and 0.7%. Participation in 2022-2023 has rebounded to the same levels as 2015-2016, however participation remains very low.

2.3.11 Overall, the data highlights that while Snowsport is most popular among younger adults, the pandemic had a significant impact on participation for everyone. The recovery is strongest among the youngest group, but there's still a slight gap compared to pre-pandemic years, especially for those aged over 55. This suggests that efforts to boost Snowsport participation may need to focus on addressing the barriers faced by older adults, while also capitalising on the renewed interest among younger people.

Figure 1.05: Trends in Participation in Equestrian by Age (Ages 16+), 2015–2023 (Active Lives Data)



2.3.12 The above graph presents the proportion of adults aged 16 and over in England who reported weekly participation in Equestrian, broken down by age group, using data from Sport England's Active Lives survey between 2015 and 2023.

2.3.13 Participation in Equestrian has been consistently highest among adults aged 16-34 throughout the eight-year period, starting at 3.3% in 2015-16 and maintaining similar levels until a sharp decline to 1.5% in 2020-21. Although participation has slightly recovered to 1.9% in 2022–23, it remains well below pre-pandemic levels. The 35-54 age group also followed a similar pattern, with a peak of 2.5% in 2018-19 and a drop to 1.1% in 2020-21. This group has since seen modest growth, reaching 1.3% in the most recent year. Adults aged 55-74 consistently recorded lower participation, peaking at just 2.0% in 2018-19 and falling to 0.8% by 2022-23. Participation among those aged 75+ was minimal across the period, never exceeding 0.5% and dropping to just 0.2% in 2020-21.

2.3.14 These trends suggest that Equestrian continues to appeal most strongly to younger adults, particularly those aged 16-34, but that engagement dropped significantly during the COVID-19 pandemic and has yet to fully recover. The data also reflects ongoing age-related disparities, with very low levels of participation among adults over 55, highlighting potential access, mobility, or a lack of interest for older age groups. To support recovery and growth in the Equestrian participation, especially among middle-aged and older adults, more inclusive, age-appropriate opportunities may be needed. Addressing financial barriers, enhancing local access to riding facilities, and promoting accessible Equestrianism opportunities could help broaden appeal across age groups.

2.4 Age Trends in Other Outdoor Sporting Activities

Angling

2.4.1 Looking at age trends for Angling, there are no particularly notable findings, as the percentages of participants across the different age groups remain relatively close throughout the period. While the 35-54 age group occasionally records slightly higher participation, the differences between age bands are minor and generally fall within a narrow range. All groups experience a gentle decline in participation over time, but no group stands out with a dramatic increase or decrease. The oldest group (75+) consistently has the lowest participation, yet even here, the gap compared to other age bands is modest.

Cycling for leisure

2.4.2 Cycling for leisure participation numbers showed an overall downward trend in participation across all age groups. The 16-34 and 35-54 age groups consistently have the highest participation rates, both starting above 30% and declining to around 13% by 2022-23. The 75+ age group has consistently maintained the lowest participation levels, remaining under 9% throughout the reported period. Although there is a clear decrease in leisure cycling participation over time, especially after 2019-20, the pattern is broadly similar across all age groups, and there are no major anomalies or dramatic shifts that set one group apart from the others.

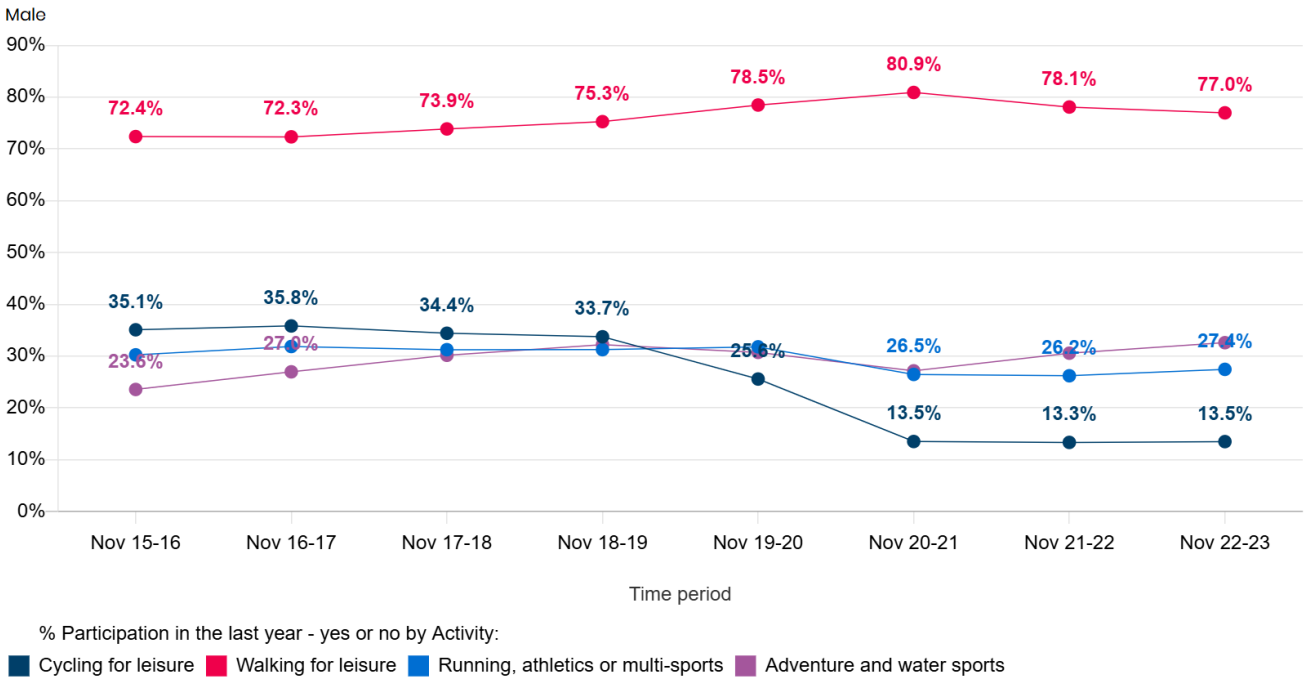
Walking for leisure

2.4.3 Unlike cycling for leisure, participation in walking for leisure has high participation rates that have increased from 2015-2016 across all age groups, with the 16-34, 35-54, and 55-74 groups all following a very similar trend, generally ranging from about 71% to 83% over the period. The 75+ group has lower participation but still sees a gradual increase, rising from 56% to around 66%. Most notably though, whilst most sporting activities saw a decline during the peak of COVID-19, walking for leisure increased for all age groups from 2018-2019 to 2019-2020, with the peak being in 2020-2021.

2.5 Gender

2.5.1 This graph tracks the percentage of males aged 16 and over in England who reported participating in four higher participation sporting activities at least once a week, as recorded by Sport England's Active Lives survey from November 2015 to November 2023.

Figure 1.06: Trends in Male Participation in higher participation sports (Ages 16+), 2015–2023 (Active Lives Data)



2.5.2 Walking for leisure stands out as the most popular activity among males throughout the period. Participation rates are consistently high, starting at 72.4% in 2015-16 and peaking at 80.9% in 2020-21, likely reflecting increased interest during the pandemic when other activities were restricted. Although there is a slight decline in the most recent years, walking remains the most popular outdoor sporting activity, with 77.0% of men participating in 2022–23.

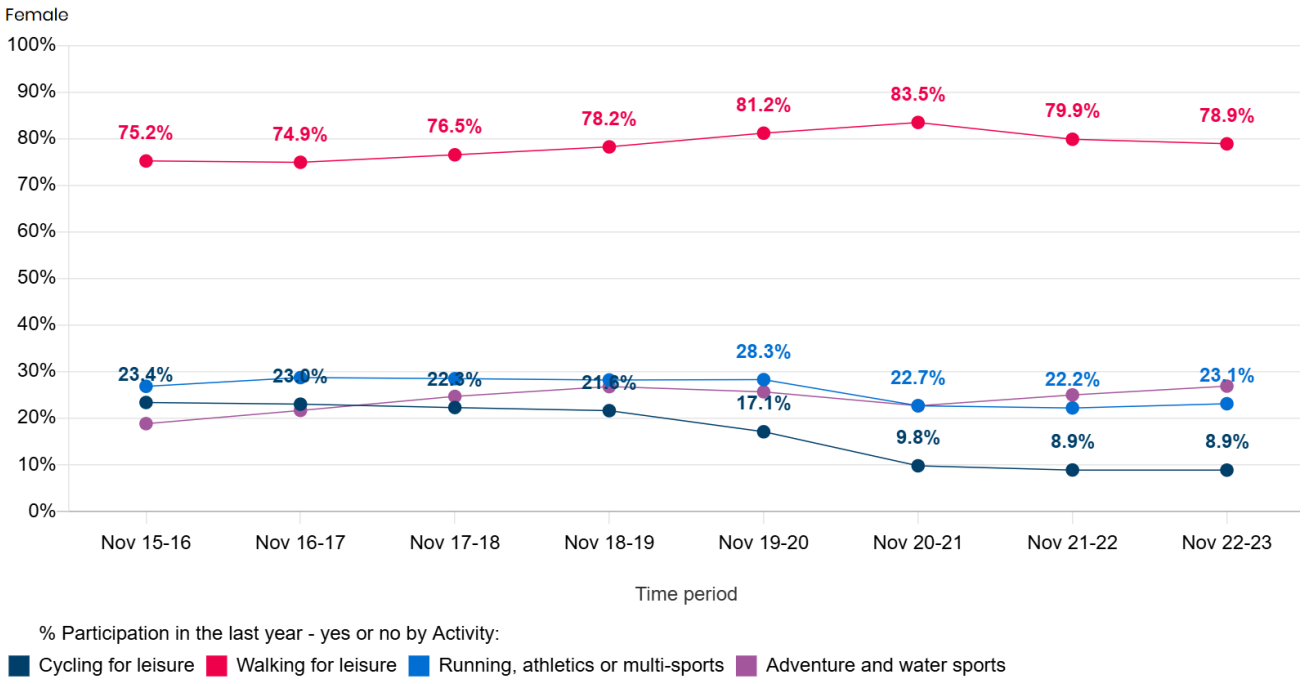
2.5.3 Cycling for leisure has seen a gradual decline over the years. Participation was at 35.1% in 2015-16, rising slightly to 35.8% the following year, but then sharply decreasing to 13.5% by 2021-22 and has remained around those levels. This downward trend has persisted, with only a slight increase to 13.5% in 2022-23. The data suggest that running and related activities have lost significant traction among men over this period.

2.5.4 Running, athletics, and multi-sports have experienced a relatively consistent trend. Starting at 27.9% in 2015-16, participation climbed to 29.9% in 2017-18 and only declined to just 27.4% by 2021-22.

2.5.5 Male engagement in adventure and water sports has shown a consistent upward trend overall. Starting at 23.6% in 2015-16, participation rose steadily to 32.2% in 2018-19. Although there was a dip during the COVID-affected year of 2020-21 (down to 27.2%), levels rebounded to 32.6% in 2022-23, the highest across the reported years.

2.5.6 In summary, walking for leisure remains by far the most popular activity among men. Cycling for leisure has decreased and appears to be stabilising at a level much lower than pre pandemic, and adventure and water sports have shown impressive growth, rebounding strongly after the pandemic. These trends highlight shifting patterns in male physical activity, with a strong preference for accessible outdoor activities and growing interest in adventure and water-based pursuits.

Figure 1.07: Trends in Female Participation in higher participation sports (Ages 16+), 2015–2023 (Active Lives Data)



2.5.7 Walking for leisure stands out as the most popular activity among women throughout the period, with participation rates consistently high and ranging from 74.9% to a peak of 83.5% in 2020-21. This spike during the pandemic likely reflects the increased appeal of accessible outdoor activities when other options were limited. Although participation has declined slightly since then, walking remains the most popular activity, with nearly four out of five women reporting they walked for leisure in 2022-23.

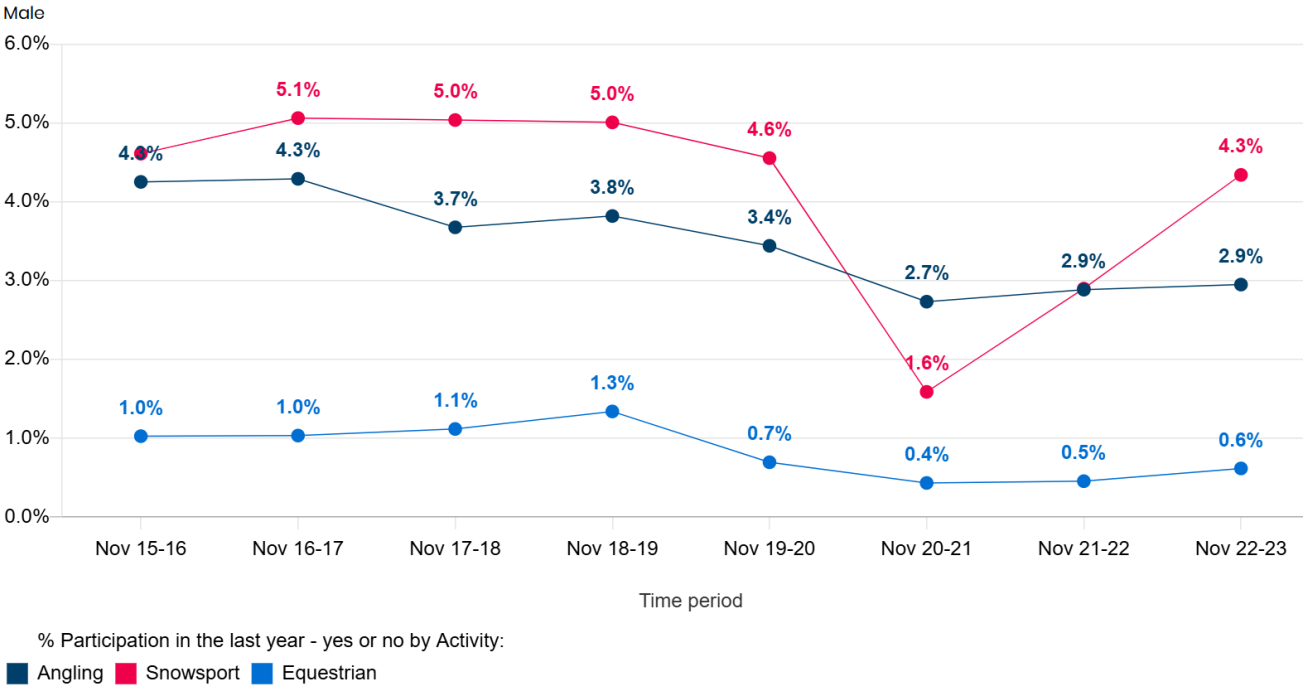
2.5.8 Cycling for leisure, on the other hand, has seen a steady decline among women. Starting at 23.4% in 2015-16, participation fell to just 8.9% by 2022-23. The most notable drop occurred after 2019-20, suggesting that the pandemic may have had a lasting impact on women's cycling habits.

2.5.9 Running, athletics, and multi-sports participation among women has fluctuated but remained relatively modest overall. Rates hovered just below 30% from 2015-16 through 2019-20. However, there was a decline during the pandemic (22.7%), and participation has since settled at 23.1% in 2022–23. While there has been some recovery, the data suggests that many women have not returned to pre-pandemic levels of engagement in these activities.

2.5.10 In adventure and water sports, female participation also increased over time, though at a slightly slower rate. It rose from 18.9% in 2015–16 to 26.8% by 2018–19, before dipping to 22.7% in 2020–21. In the same way as the male trend, female participation has since recovered, reaching 26.9% in 2022-23. Across the entire period, males consistently reported higher participation than females. The gap narrowed slightly between 2015 and 2019 but widened again following the pandemic. In 2022-23, the gender gap stood at around 5.7 percentage points, a wider gender gap than what was recorded in 2015-16 (4.7 percentage points). A widening gender gap in participation in adventure and water sports suggests there may be gender-specific barriers discouraging women from participating, and further investigation is needed to make an insightful conclusion.

2.5.11 In summary, walking for leisure remains the most popular and resilient activity among women, while cycling has experienced a marked decline. Participation in running, athletics, and multi-sports has not fully bounced back from the pandemic, and although adventure and water sports have recovered, a persistent and growing gender gap highlights the need to better understand and address the factors influencing women's participation in these activities.

Figure 1.08: Trends in Male Participation in lower participation sports (Ages 16+), 2015–2023 (Active Lives Data)



2.5.12 This graph illustrates the percentage of males aged 16 and over in England who reported participating in lower participation sports at least once in the last year, as recorded by Sport England's Active Lives survey from November 2015 to November 2023.

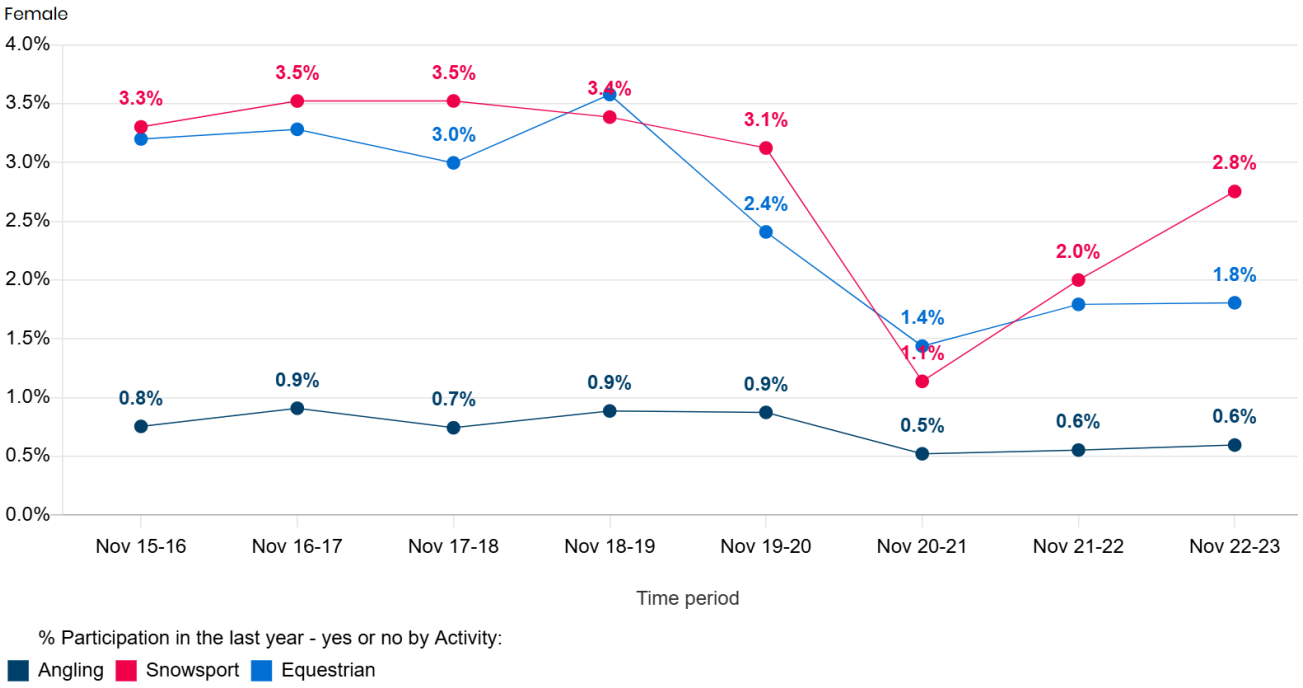
2.5.13 For Angling, participation among males has been relatively stable over the period, starting at 4.0% in 2015-16 and fluctuating only slightly, with a small dip to 3.4% in 2019-20 before rising again to 2.9% in 2022-23. There are no dramatic changes or trends, suggesting a consistent core of male participants in Angling throughout these years.

2.5.14 In Snowsport, male participation remained steady from 2015 to 2020, peaking at 5.1% in 2016-17. A sharp decline occurred in 2020-21, falling to 1.6%, likely due to the pandemic and related restrictions on travel and indoor activities. Notably, participation has since rebounded, reaching 4.3% in 2022–23, which is close to pre-pandemic levels. This suggests a strong recovery and renewed interest in Snowsport among men once restrictions eased.

2.5.15 Equestrian participation among males has consistently been the lowest of the three activities, hovering around 1% for the pre-pandemic period. There is a slight increase to 1.3% in 2018-19, but participation drops to 0.4% in 2020-21, again likely reflecting the impact of the pandemic. Since then, there has been a modest recovery, with participation reaching 0.6% in 2022-23. However, the overall trend for equestrian is one of low yet relatively stable engagement among men.

2.5.16 In summary, the data highlights the resilience of Angling and the strong recovery of Snowsport following the pandemic, while Equestrian participation remains consistently low among males. The sharp dips in 2020-21 across all activities underline the significant impact of COVID-19 restrictions, but the subsequent rebound, particularly in Snowsport, indicates that male interest in these activities has largely returned.

Figure 1.09: Trends in Female Participation in lower participation sports (Ages 16+), 2015–2023 (Active Lives Data)



2.5.17 This graph shows the percentage of females aged 16 and over in England who reported participating in Angling, Snowsport, and Equestrian at least once in the last year, based on Sport England's Active Lives survey from November 2015 to November 2023.

2.5.18 In Snowsport, female participation was consistently lower than that of males, peaking at 3.5% between 2016 and 2018. It then declined slightly before experiencing a sharp drop to 1.1% in 2020-21, due to the pandemic. Recovery has been slower for women than for men, with participation rising to 2.8% by 2022-23. Although both groups were impacted by COVID-19, male participation has rebounded more strongly, with the gender gap remaining evident across all years. As the gender gap in Snowsport participation has remained persistent, this suggests possible differences in access, interest, or barriers to entry that may warrant further exploration.

2.5.19 Turning to Equestrian, female participation rates are notably higher than those for males at between 3% and 3.5% in the pre-pandemic period. There is a clear dip during the pandemic, with participation falling to 1.4% in 2020-21. However, this is followed by a steady recovery, reaching 1.8% in 2022-23. While the pandemic had a significant impact, the overall trend shows that equestrian activities remain a more popular choice among women compared to men, and participation is gradually increasing.

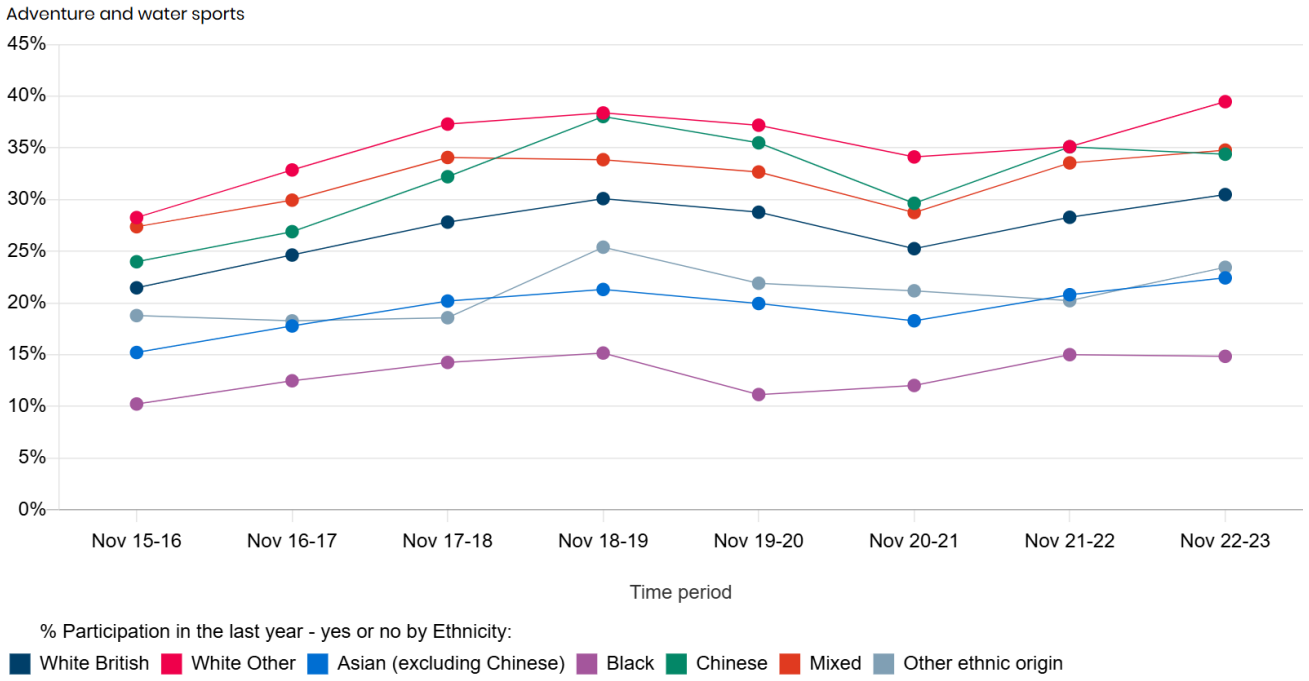
2.5.20 For Angling, participation among women is consistently the lowest of the three activities, remaining below 1% throughout the period. There is a slight increase to 0.9% in 2016-17 and 2018-19, but the rate drops to 0.5% in 2020-21 before inching back up to 0.6% in 2022-23. The data suggests that Angling continues to attract relatively few female participants, with little change over time.

2.5.21 In summary, the data highlights clear gender differences in participation across these activities. While all three activities saw declines during the pandemic, Equestrian remains considerably more popular among women than men, and Snowsport participation among women has not yet fully recovered to pre-pandemic levels. Angling, on the other hand, continues to have low engagement among women, with no significant upward trend.

2.6 Ethnicity

2.6.1 For this section, the sporting activities that show the most visible and notable trends have been focused on in the trend analysis.

Figure 1.10: Trends in Participation in Adventure and Water Sports by Ethnicity (Ages 16+), 2015–2023 (Active Lives Data)



2.6.2 The above graph shows the percentage of people who participated in adventure and water sports over the past year, broken down by ethnicity from November 2015-16 to November 2022-23

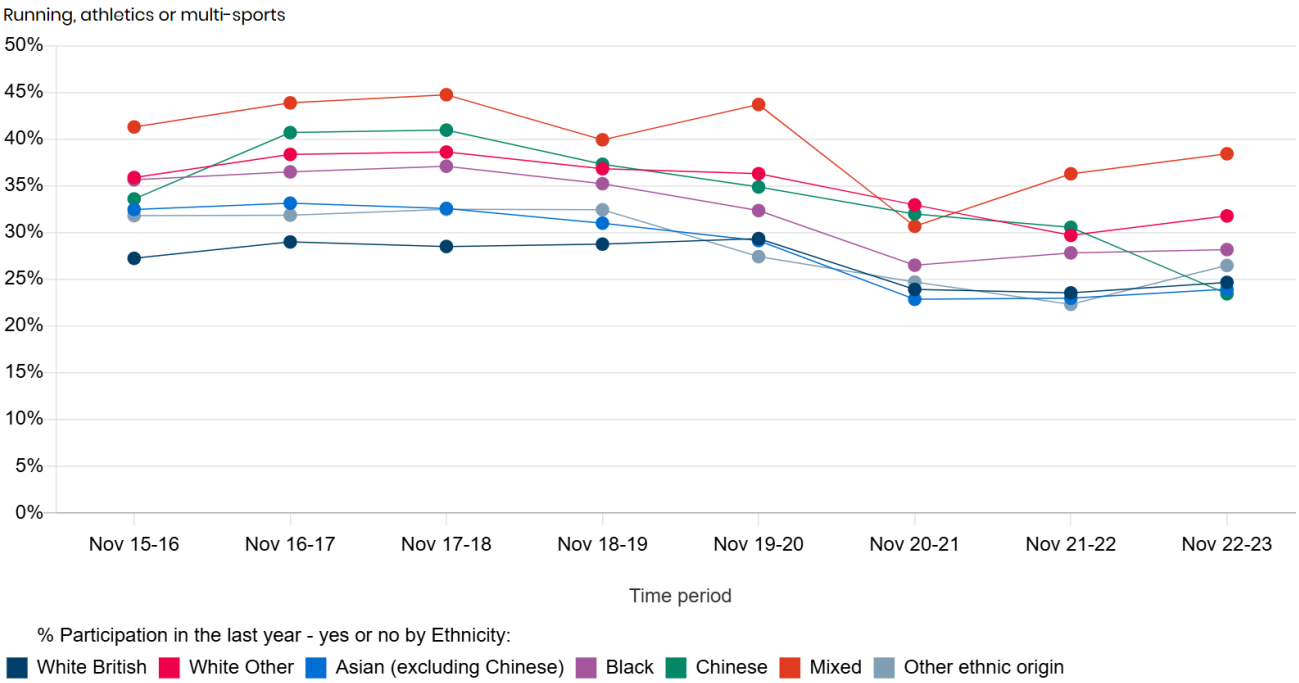
2.6.3 The "White Other" group stands out with consistently high participation rates, peaking at approximately 39% in 2018-19 and returning to a similar level by 2022-23. This suggests strong and sustained engagement within this demographic. The "Chinese" and "Mixed" groups also maintain relatively high levels of participation, with both rebounding after the pandemic dip to reach about 35% in the most recent year.

2.6.4 The "White British" group has shown steady growth over time, starting at just above 20% and rising to around 30% by 2022-23. This indicates increasing engagement with adventure and water sports in this group, possibly due to greater access, awareness, or shifting leisure preferences.

2.6.5 In contrast, the "Black" and "Asian (excluding Chinese)" groups have consistently lower participation rates, though there is some improvement over time. The “Black” group starts at around 10% in 2015-16 and ends at about 15% in 2022-23, with only modest increases and a noticeable dip during 2020-21. This persistent gap suggests that these communities may still face barriers to full participation, such as limited access, cost, or possible cultural disconnects with these types of sports.

2.6.6 The COVID-19 pandemic clearly impacted participation in 2020-21 across all groups, with most showing a decline that year. However, most groups have since recovered, and some, such as the “White Other”, “Mixed”, and “Chinese” groups have even surpassed their pre-pandemic levels. The "Other ethnic origin" group has also seen a meaningful rebound, though it has not yet reached its peak of 2018-19.

Figure 1.11: Participation in running, athletics or multi-sports by Ethnicity (Ages 16+), 2015–2023 (Active Lives Data)

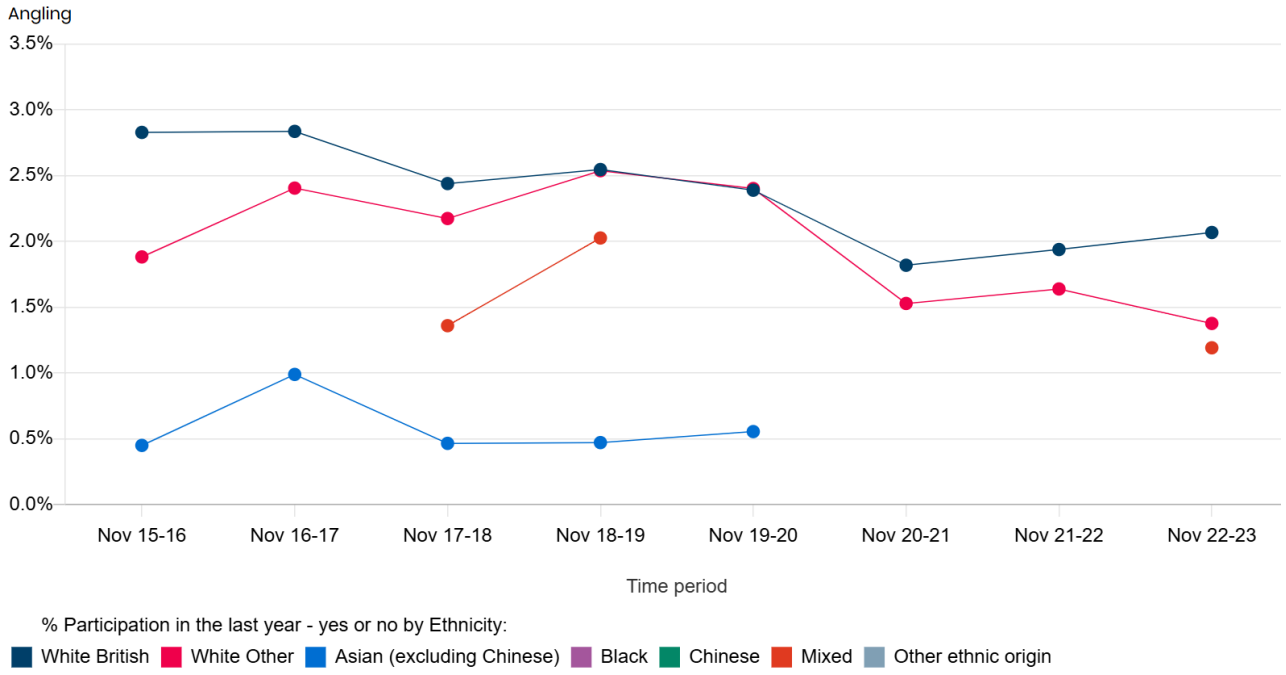


2.6.7 This graph shows participation in people aged 16+ across 2015-2023 in running, athletics or multi-sports by ethnicity. It shows some clear patterns in participation rates across different ethnic groups. The most noticeable finding is that the "Mixed" ethnic group consistently reports the highest participation rates, peaking at around 45% just before the pandemic and remaining above other groups throughout the period. "White Other" and "Chinese" groups also show relatively high participation, generally staying in the mid-to-high 30% range.

2.6.8 In contrast, "White British", "Asian (excluding Chinese)", "Black", and "Other ethnic origin" groups tend to have lower participation rates, mostly hovering between 28% and 35%. While some groups, like "Mixed" and "White Other", have seen slight recoveries in participation rates in the most recent years, all groups-have not returned to their pre-pandemic levels.

2.6.9 The implications here are twofold. First, there are persistent differences in participation across ethnic groups, with the "Mixed" group standing out as the most engaged in running, athletics, and multi-sports. Second, the pandemic had a clear negative impact on participation for everyone, but the recovery has been uneven, suggesting that some groups may face more barriers to returning to regular activity.

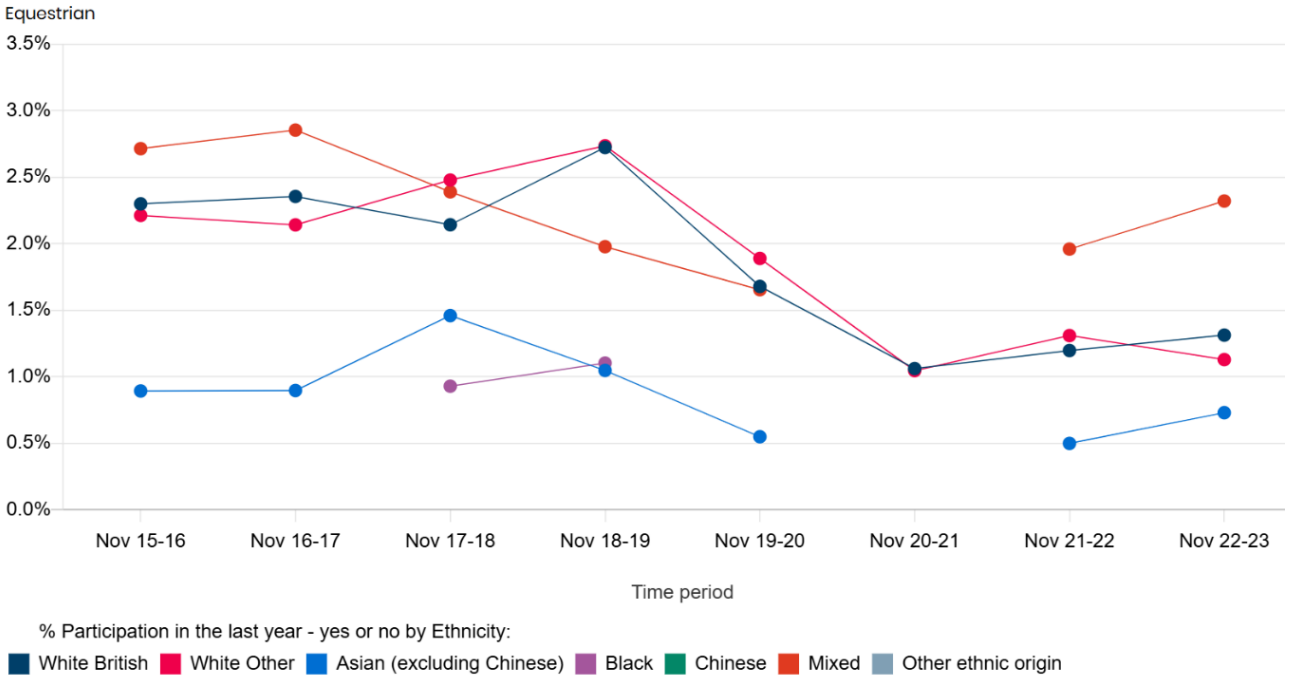
Figure 1.12: Trends in Participation in Angling by Ethnicity (Ages 16+), 2015–2023 (Active Lives Data)



2.6.10 The graph shows participation in Angling by ethnicity for adults in England from 2015 to 2023. The most noticeable pattern is that "White British" and "White Other" groups consistently have the highest participation rates, generally ranging between 2% and 3% throughout the period. Other ethnic groups, including "Asian (excluding Chinese)" report much lower rates, typically below 1%. Participation levels are not recorded for "Black", "Chinese" and "Other ethnic origin". The lack of data for these groups indicates these groups do not have any participation in Angling. Additionally, there are only two data points for people of "Mixed" ethnicity and there is a complete absence of participation data across the COVID-19 pandemic.

2.6.11 All groups saw a decline in participation during 2020-21, likely reflecting the impact of the pandemic, and rates have remained lower since then. Overall, the data highlights a persistent gap in Angling participation between groups of White ethnicity and other ethnic backgrounds, with little evidence of this gap narrowing over time. This demonstrates that Angling remains far more popular among people of "White British" and "White Other" ethnicities, while participation among other ethnic groups remains low.

Figure 1.13: Trends in Participation in Equestrian by Ethnicity (Ages 16+), 2015–2023 (Active Lives Data)

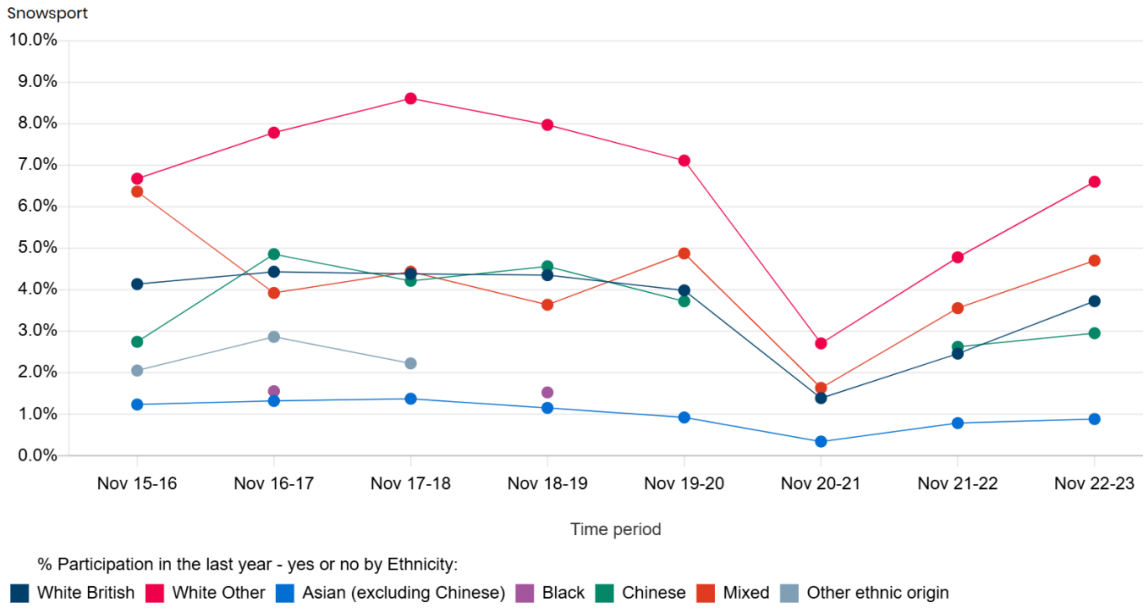


2.6.12 This graph showing Equestrian participation by ethnicity from 2015 to 2023 reveals some clear differences in engagement across groups. “White Other” and “Mixed” ethnic groups consistently show the highest participation rates, often reaching or exceeding 2.5% before the pandemic. “White British” participants also maintain steady involvement, generally between 2% and 3% before the pandemic. In contrast, people of “Asian (excluding Chinese)” and “Black” ethnicities have notably lower participation, rarely rising above 1.5% and in many years being below 1%.

2.6.13 People (aged 16 and over) of “Chinese” and “Other ethnic origin” have no recorded participation rates for Equestrian, which implies either extremely low levels of engagement in the sport within these groups meaning that participation is so minimal it falls below the threshold for reportable data.

2.6.14 There is a noticeable spread in the data, with the gap between the highest and lowest participating groups for some ethnic groups being double. All groups saw a sharp drop in 2020-21, but some recovery is evident in the following years, particularly among “White Other” and “Mixed” groups. Despite this, the overall trend shows that ethnic minority communities remain under-represented in equestrian activities.

Figure 1.14: Trends in Participation in Snowsport by Ethnicity (Ages 16+), 2015–2023 (Active Lives Data)



2.6.15 The above graph illustrates the percentage of people participating in Snowsport over the last year, segmented by ethnicity and spanning from November 2015-16 to November 2022-23.

2.6.16 One of the most prominent patterns is the consistently higher participation among the "White Other" group, which peaks at around 8.5% in 2017-18. This demonstrates that this demographic has had stronger engagement and access to Snowsports compared to others throughout the years. In contrast, participation among individuals from "Asian (excluding Chinese)" and "Black" ethnic groups remains consistently low, generally under 2%, with little change over the observed period. This persistent disparity indicates that these communities may face systemic or structural barriers to participation, such as cultural perceptions, limited access to facilities, or economic constraints.

2.6.17 There is also a noticeable dip in participation across all ethnic groups during the 2020-21 period. This coincides with the COVID-19 pandemic, which disrupted most recreational and travel-related activities, including Snowsports which typically involve a lot of travel. While most groups show a recovery trend in subsequent years, participation for “White Other”, “White British”, “Asian (excluding Chinese)”, and “Chinese” remains lower than levels pre-pandemic. Interestingly, the "Chinese" and "Mixed" ethnic groups exhibit more volatile participation rates over the years. This fluctuation could suggest varying levels of interest or access and may point to untapped potential that could be cultivated through more focused outreach.

2.6.18 Overall, the data underscores a need for more inclusive and targeted strategies to broaden participation in Snowsports. Addressing financial, cultural, and accessibility barriers is essential, especially for those ethnic groups that have been historically underrepresented.

2.7 Ethnicity Trends in Other Outdoor Sporting Activities

Walking for Leisure

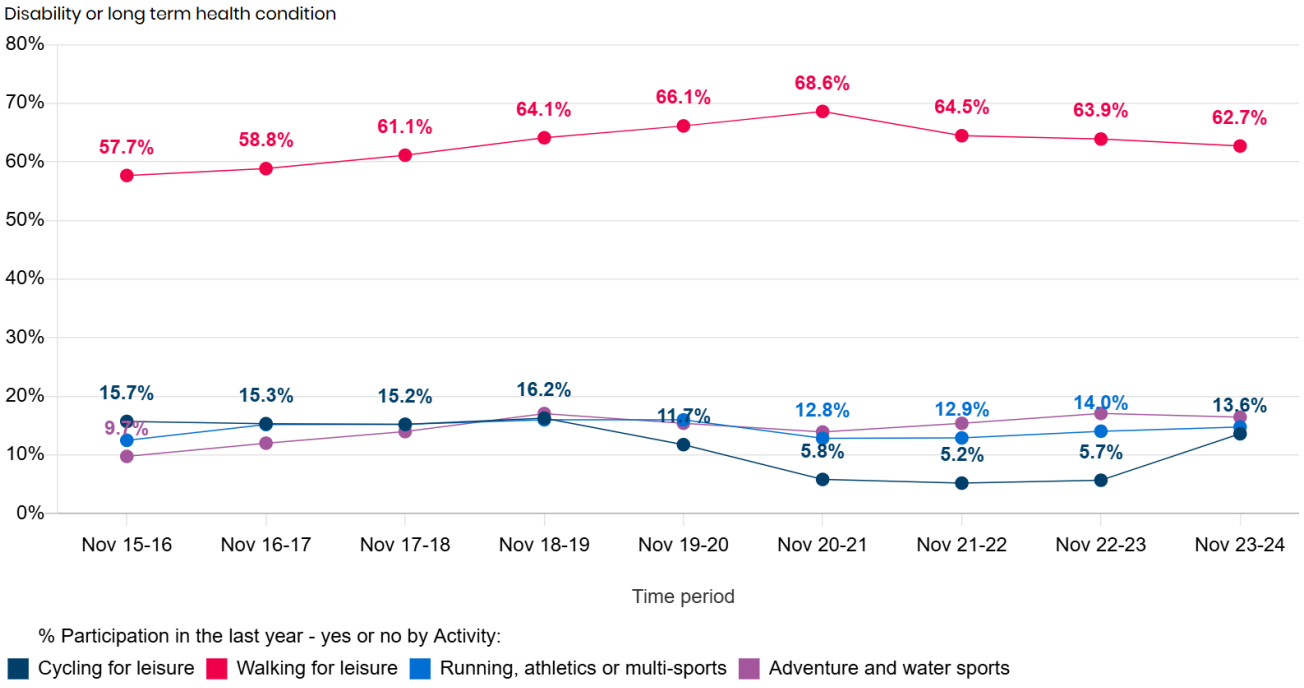
2.7.1 Looking into participant numbers in walking for leisure, "White British" and "White Other" groups consistently report the highest participation rates, generally around 70-80% throughout the period. Other ethnic groups, including "Asian (excluding Chinese)", "Black", "Chinese", "Mixed", and "Other ethnic origin", have slightly lower participation rates. Overall, there are no particularly striking findings or dramatic shifts in the data. The percentages for each ethnic group have remained relatively steady, and the gaps between groups have not significantly widened or narrowed over time. This suggests that walking for leisure is a popular and accessible activity across all ethnic backgrounds, with participation rates remaining broadly similar throughout the period.

Cycling for Leisure

2.7.2 While there are some small differences between groups, the overall pattern is quite consistent: all ethnic groups experienced a steady decline in participation over time, especially after 2019-20. By the end of the period, participation rates for all groups have converged, with most sitting between 12% and 17%. There are no dramatic shifts or standout trends for any group, and the percentages remain relatively close throughout. Overall, there aren't any particularly notable findings here-cycling for leisure appears to have declined at a similar rate across all ethnic backgrounds, resulting in broadly comparable participation rates by 2022-23.

2.8 Disability or Long-term Health Conditions

Figure 1.15: Trends in participation in people with a disability or long-term health condition in higher participation sports (Ages 16+), 2015–2023 (Active Lives Data)



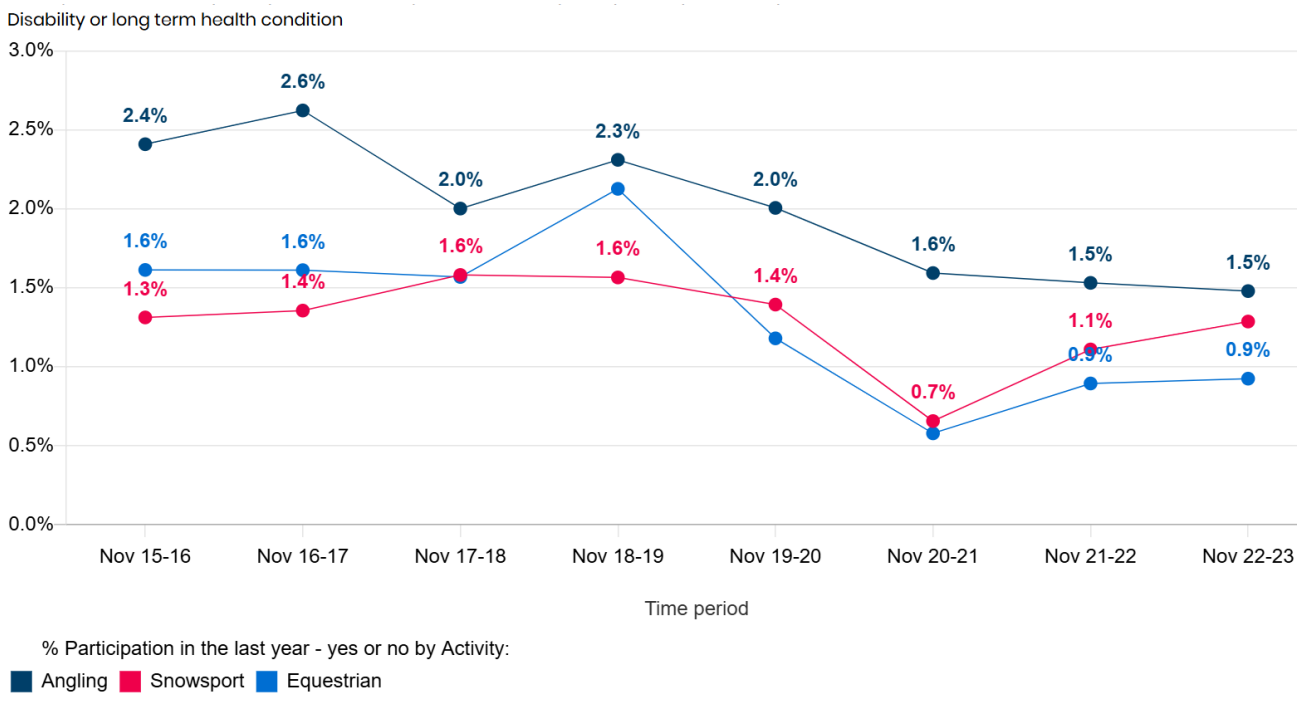
2.8.1 Over the past several years, participation in adventure and water sports among people with a disability or long-term health condition has grown noticeably. Starting at 9.7% in 2015-16, participation steadily increased to reach 17.1% by 2022-23. While there was a slight decline during the 2020–21 period, due to the impact of the COVID-19 pandemic, participation quickly rebounded and even surpassed pre-pandemic levels, indicating a strong and growing interest in these types of activities for people with a disability or long-term health condition.

2.8.2 Looking at other activities, walking for leisure stands out as by far the most popular choice, with participation rates rising from 57.7% in 2015-16 to a peak of 68.6% in 2020-21. This increase during the pandemic likely reflects the accessibility and appeal of walking when other options were limited. Although there has been a slight decline since the peak, walking remains the dominant activity, with over 60% of people with a disability or long-term health condition still taking part in 2023-24.

2.8.3 Cycling for leisure and running, athletics, or multi-sports have seen more modest levels of engagement. Running, athletics, and multi-sports participation has remained relatively steady, fluctuating between 11% and 14% over the years. Cycling for leisure saw a gradual increase from 15.7% in 2015-16 to 16.2% in 2018-19, but participation dropped sharply during the pandemic to just over 5%. However, levels have somewhat recovered to 13.6% in the most recent reporting year.

2.8.4 Overall, the data suggest that while walking for leisure remains the most accessible and widely chosen activity, there is a growing appetite for adventure and water sports among people with a disability or long-term health condition. Cycling and running-related activities have struggled to regain momentum after the pandemic, highlighting the need for continued support and inclusive programming to help these groups stay active. For organisations and policymakers, these trends point to the importance of maintaining and enhancing accessibility in walking and adventure sports, while also addressing barriers that may be limiting participation in other activities.

Figure 1.16: Trends in Participation in people with a disability or long-term health condition in lower participation sports (Ages 16+), 2015–2023 (Active Lives Data)



2.8.5 Participation in Angling among people with a disability or long-term health condition has remained the highest of the three activities across the period, though the numbers have fluctuated. Starting at 2.4% in 2015-16, participation peaked at 2.6% in 2016-17 and stayed above 2% until 2019-20. Like many activities, there was a notable drop during the pandemic, falling to 1.6% in 2020-21. Since then, participation has slightly decreased to 1.5% by 2022–23.

2.8.6 Participation in Snowsports within the same group has remained consistently low for people with a disability or long-term condition. Over the eight-year period, rates have fluctuated slightly between 0.7% and 1.6%, without any meaningful upward trend. Even as restrictions eased following the pandemic, Snowsport participation did not show a notable recovery for people with disabilities. This may be due to physical limitations of Snowsport causing barriers to those with physical disabilities.

2.8.7 Equestrian participation has followed a similar pattern to Angling, though at a slightly lower participation level. Rates hovered around 1.6% from 2015-16 to 2017-2018, saw an increase in 2018-2019 and then experienced sharp drop to just 0.5% during 2020-21, reflecting the impact of COVID-19 restrictions. While there has been some recovery since, with participation rising to 0.9% in 2022-23, levels remain well below those seen at the start of the period.

2.8.8 Overall, the data show that Angling remains the most popular of these three activities for people with a disability or long-term health condition, but all three sports experienced a significant dip during the pandemic and have yet to fully bounce back. Snowsport has struggled to gain traction in this group, suggesting there may be ongoing barriers to participation that need to be addressed. For organisations looking to promote inclusive sport, these trends highlight the importance of sustained support and targeted initiatives, especially for activities like Snowsport and Equestrian, where engagement remains low.

2.9 Social Status

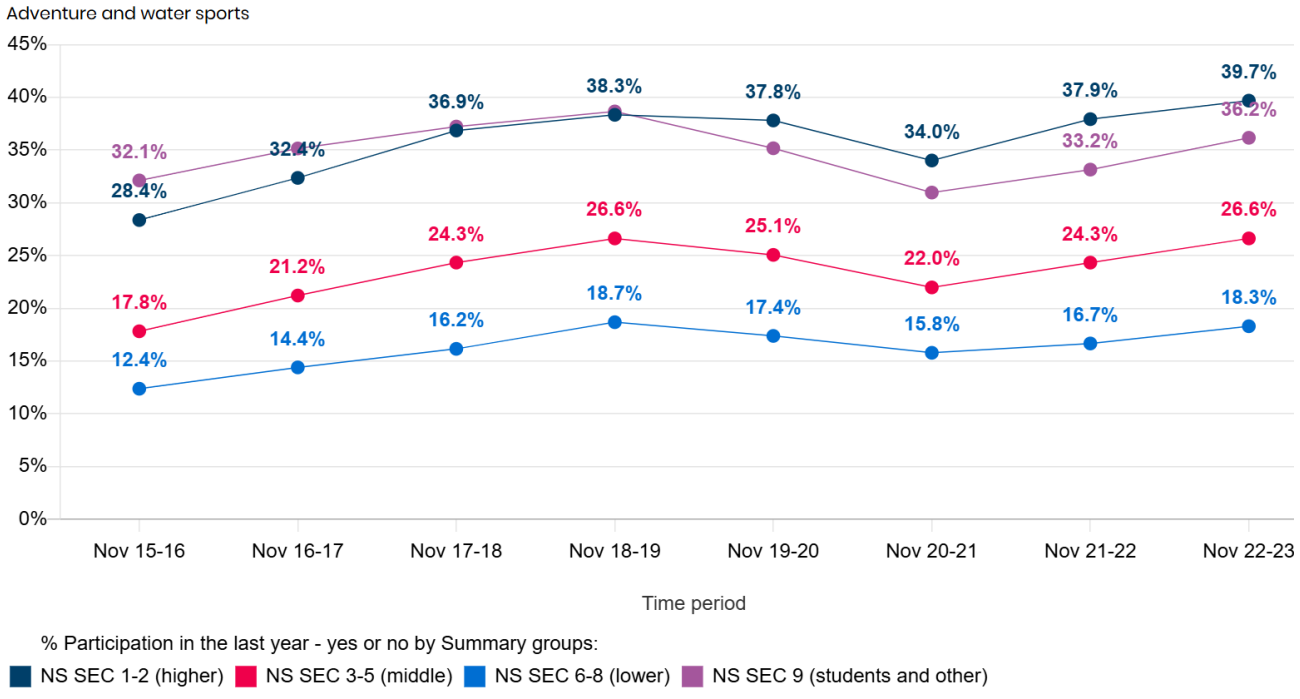
2.9.1 For this section, the sporting activities that show the most visible and notable trends have been focused on in the trend analysis.

2.9.2 The graphs below show yearly participation among people aged 16 and over in the UK, broken down by National Statistics Socio-economic Classification (NS-SEC) groups, from November 2015-16 to November 2022-23.

2.9.3 NS-SEC is the UK's official system for categorising socio-economic position, primarily based on occupation and employment status. The groups shown here are:

- NS SEC 1-2: Higher managerial, administrative, and professional occupations
- NS SEC 3-5: Middle/intermediate occupations
- NS SEC 6-8: Lower supervisory, semi-routine, and routine occupations
- NS SEC 9: Students and others (including those never worked or long-term unemployed)

Figure 1.17: Participation in Adventure and Water Sports by Social Status (Ages 16+), 2015–2023 (Active Lives Data)



2.9.4 The above graph tracks weekly participation in Adventure and Water Sports among people aged 16 and over in England, broken down by (NS-SEC) groups, from November 2015-16 to November 2022-23.

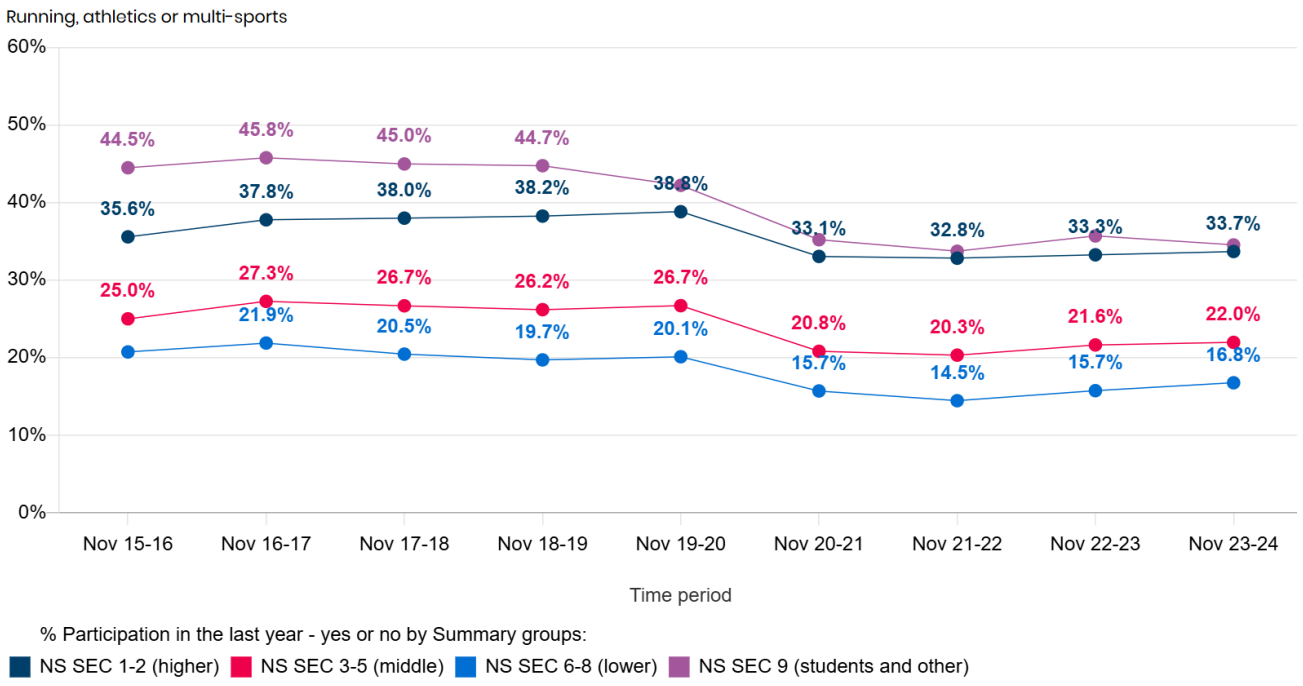
2.9.5 The graph makes it clear that participation is highest among students and others (NS SEC 9) and those in higher socio-economic groups (NS SEC 1-2). Students and others start at 32.1% in 2015-16 and climbs steadily to 36.2% by 2022-23, with a peak of 38.3% in 2018-19. The higher occupational group follows a similar upward trend, rising from 28.4% to 39.7% over the same period, and even surpassing the student group in the most recent year.

2.9.6 The middle socio-economic group (NS SEC 3-5) shows moderate but stable participation, increasing from 17.8% to 26.6%. There's a steady rise over the years, with a small dip to 22.0% during the pandemic in 2020-21, but the group quickly rebounds. The lower socio-economic group (NS SEC 6-8) consistently has the lowest participation, starting at 12.4% and reaching 18.3% by 2022-23. While their participation also grows over time, the gap between them and the higher groups remains significant.

2.9.7 These trends highlight that Adventure and Water Sports are most popular among students, young people, and those in higher socio-economic positions. The consistently lower participation among people in lower socio-economic groups suggests that barriers-such as cost, access, or awareness-are still in place. The strong growth among all groups, especially after the pandemic, shows that interest in these activities is rising, but the benefits are not being shared equally.

2.9.8 This suggests a need for targeted efforts to make adventure and water sports more accessible to those in lower socio-economic positions. Potential efforts may include subsidised/reduced price programs, community outreach, or partnerships with schools and local organisations in lower socio-economic areas. The data also points to a big opportunity for providers to engage students and young professionals, who are already highly active in these sports.

Figure 1.18: Participation in Running, athletics or multi-sports by Social Status (Ages 16+), 2015–2024 (Active Lives Data)



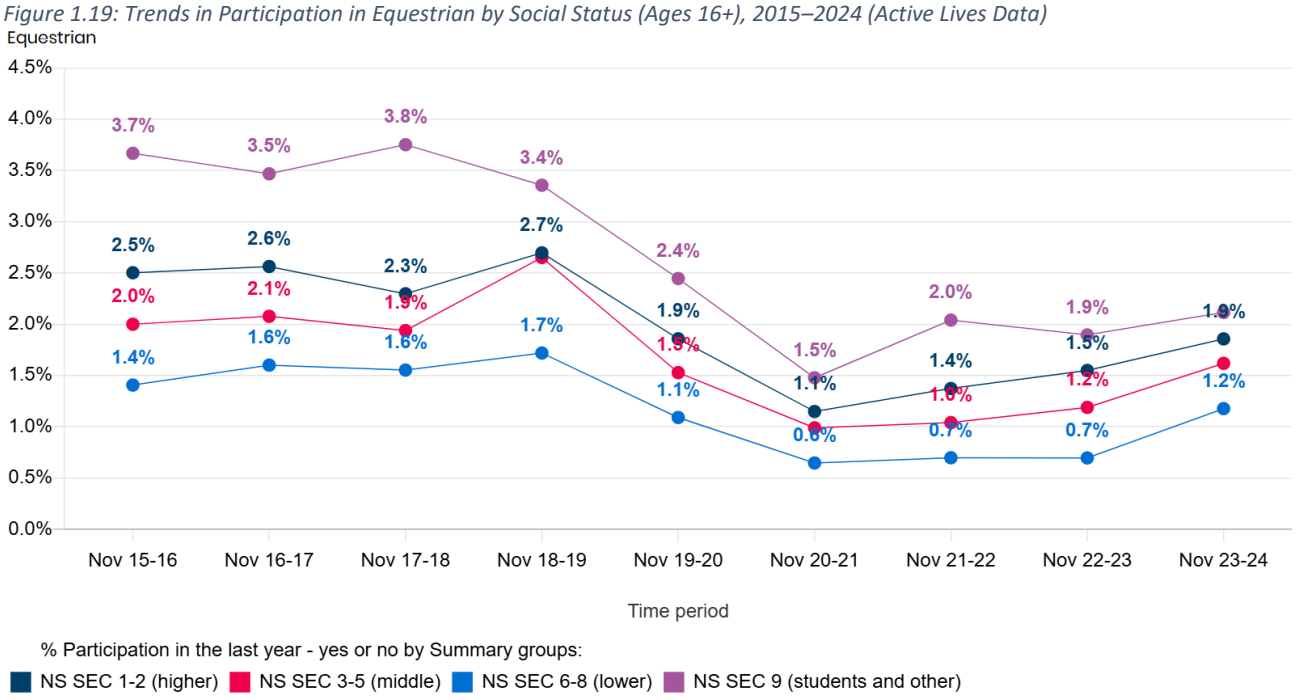
2.9.9 The graph shows trends in participation in running, athletics, or multi-sports by socio-economic group from 2015 to 2024. This outdoor sporting activity group has Active Lives data that has been published for 2023-2024.

2.9.10 Across this period, students and others (NS SEC 9) consistently report the highest participation rates, hovering around 45% before the pandemic and dipping slightly to 38.8% in 2019-20. Notably, this group experienced a small decrease in participation during the COVID-affected years but remained higher than other social status groups, which may be due to students having more flexible schedules and fewer competing commitments during lockdowns, making it easier for them to stay active or take up new activities. However, by 2023-2024, the higher (NS SEC 1-2) group reached the same participation rates as the students and other (NS SEC 9) group.

2.9.11 Over the period, the higher (NS SEC 1-2), middle (NS SEC 3-5), and lower (NS SEC 6-8) socioeconomic groups all show lower and more stable participation rates over time. The higher group consistently participates at a rate of around 35–38%, while the middle group stays in the mid-20% range, and the lower group lags behind at roughly 15–22%. All groups saw a noticeable drop in participation during the pandemic, but students and others were the least affected and have maintained relatively high engagement since.

2.9.12 Overall, the data highlights a clear gap between students and the rest of the population when it comes to running, athletics, and multi-sports. The resilience and even slight increase in activity among students during the pandemic suggest that this group may have unique opportunities or motivations to stay active, while other groups may face more barriers during periods of disruption.

Figure 1.19: Trends in Participation in Equestrian by Social Status (Ages 16+), 2015–2024 (Active Lives Data)



2.9.13 This outdoor sporting activity group has Active Lives data that has been published for 2023-2024.

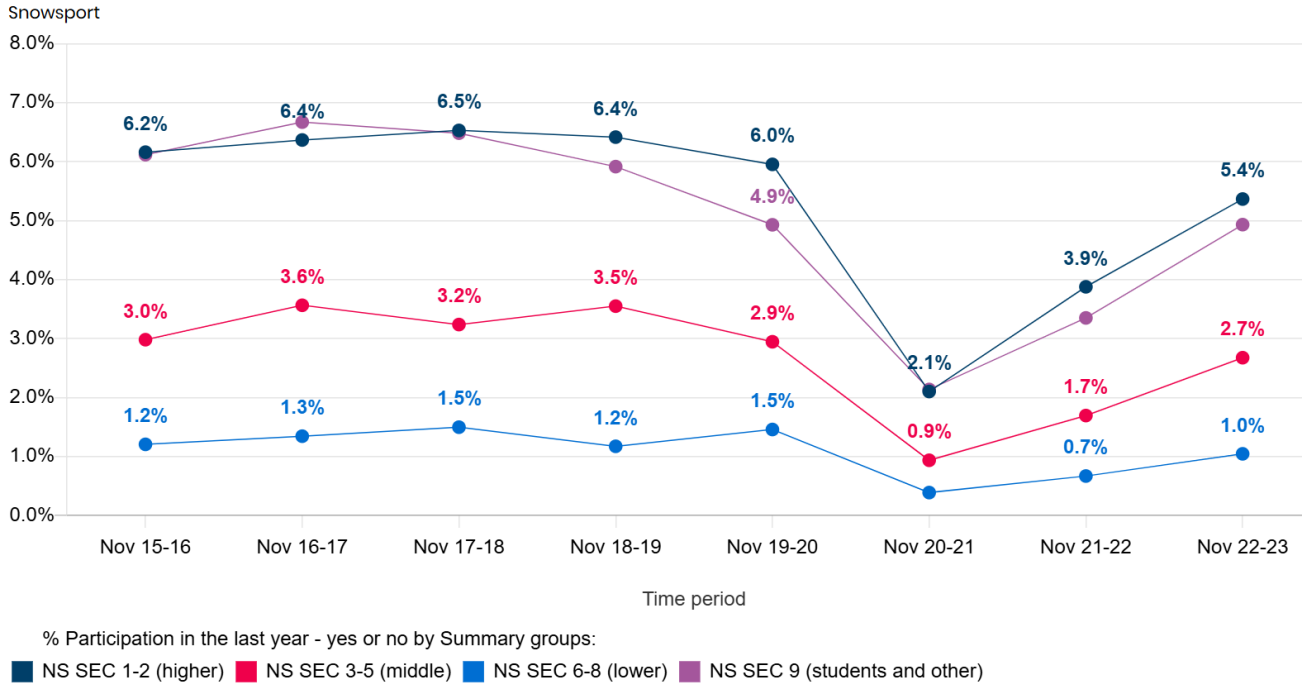
2.9.14 This graph on Equestrian participation by social status from 2015 to 2024 reveals some clear differences between groups and how these have shifted over time. Students and others (NS SEC 9) have consistently reported the highest participation rates, starting at 3.7% in 2015-16 and peaking at 3.8% in 2017-18. Although their participation dropped sharply during the pandemic to a low of 1.5% in 2020-21, this group has since shown a modest recovery, reaching 1.9% by the most recent year.

2.9.15 The higher (NS SEC 1-2) and middle (NS SEC 3-5) socioeconomic groups have followed similar patterns, with both starting around 2-2.5% and experiencing a noticeable dip during the pandemic. The higher group fell from 2.5% in 2018-19 to just 1.1% in 2020-21, while the middle group dropped from 2.7% to 1.1% over the same period. Both groups have seen a slow but steady recovery since, though neither has returned to their pre-pandemic highs.

2.9.16 The lower socioeconomic group (NS SEC 6-8) has consistently reported the lowest participation rates in equestrian activities, starting at 1.4% and dropping to just 0.6% during the pandemic. While there has been some improvement in recent years, this group remains the least engaged, with participation at only 1.2% in 2023-24.

2.9.17 Overall, the data highlights a persistent gap in equestrian participation between socioeconomic groups, with students and those in higher social classes more likely to take part. The pandemic had a significant impact across all groups, but the recovery has been uneven, and lower socioeconomic groups continue to have smaller participation numbers. This suggests that barriers to participation, such as cost, access, or awareness may be more pronounced for those in lower social classes, and targeted efforts may be needed to help close this gap.

Figure 1.20: Trends in Weekly Participation in Snowsport by Social Status (Ages 16+), 2015–2023 (Active Lives Data)



2.9.18 The above graph tracks participation in Snowsport among people aged 16 and over in the UK, broken down by (NS-SEC) groups, from November 2015-16 to November 2022-23.

2.9.19 Participation in Snowsport is consistently highest among those in the highest NS-SEC group (1-2), with rates ranging from 6.0% to 6.5% before the pandemic. After a sharp drop to 2.1% in 2020-21, due to COVID-19 restrictions, participation rebounded to 5.4% by 2022-23, though it has not fully returned to pre-pandemic levels. Students and others (NS SEC 9) generally have participation rates similar to the higher group, with a notable dip during the pandemic and a partial recovery afterward.

2.9.20 The middle group (NS SEC 3-5) shows moderate participation, peaking at 3.6% in 2016-17 and generally fluctuating between 2.7% and 3.6%.

2.9.21 Those in the lowest socio-economic group (NS SEC 6-8) have the lowest participation rates throughout the period, never exceeding 1.5%. Their rates also fell during the pandemic (0.7% in 2021-22) and have only slightly increased since.

2.9.22 The data highlights a clear social gradient in Snowsport participation: people in higher socio-economic positions are far more likely to take part in Snowsport than those in lower positions. This likely reflects the higher costs associated with Snowsports such as equipment, travel, and lift passes, which can be prohibitive for those in lower socio-economic groups. The pandemic had a significant impact across all groups, but the recovery has been strongest among the most advantaged.

2.9.23 These patterns suggest that Snowsport remains an exclusive activity in the UK, with barriers to entry closely tied to social status. If sporting bodies want to broaden participation, they may need to address these financial and structural barriers, perhaps through targeted subsidies, community programs, or initiatives aimed at making Snowsport more accessible to those in lower socio-economic groups.

2.10 Social Status Trends in Other Outdoor Sporting Activities

Walking for Leisure

2.10.1 Participation rates are fairly consistent within each group, with those in the higher socioeconomic category (NS SEC 1-2) reporting the highest levels, generally between 83% and 91%. The middle (NS SEC 3-5) and lower (NS SEC 6-8) groups have slightly lower rates, but the differences are not dramatic, and all groups follow a similar trend over the 2015-2023 period. Overall, there aren't many notable differences or standout findings here; walking for leisure appears to be a popular and accessible activity across all socioeconomic backgrounds, with participation rates remaining broadly similar throughout the period.

Cycling for Leisure

2.10.2 Across the 2015-2023 period, there are some differences between the groups, however the overall pattern is quite consistent: all groups experienced a steady decline in participation from 2015-16 through to 2022-23, with a particularly sharp drop around 2020-21, influenced by the pandemic. Although the higher socioeconomic group (NS SEC 1-2) consistently reports the highest participation rates, and the lower group (NS SEC 6-8) the lowest, the trends are broadly similar, and all groups show a noticeable rebound in the most recent year. Overall, there aren't many dramatic shifts between groups, cycling for leisure appears to have followed the same general trajectory across all socioeconomic backgrounds, with participation rates remaining relatively close throughout the period.

Angling

2.10.3 Across the 2015-2023 period, the differences between groups are quite modest, with all groups following a similar downward trend over time. The middle socioeconomic group (NS SEC 3-5) consistently reports the highest participation, but even here rates only range from 3% at the start of the period to just under 2% by 2023-24. The higher, lower, and student/other groups all cluster closely together, generally between 1.3% and 2.4%. There's a slight dip for all groups around 2020-21, likely due to the pandemic, but no group stands out dramatically from the others. In short, there aren't any major differences or standout findings. Angling participation appears relatively consistent across socioeconomic backgrounds, with only small variations between groups.

2.11 Index of Multiple Deprivation (IMD)

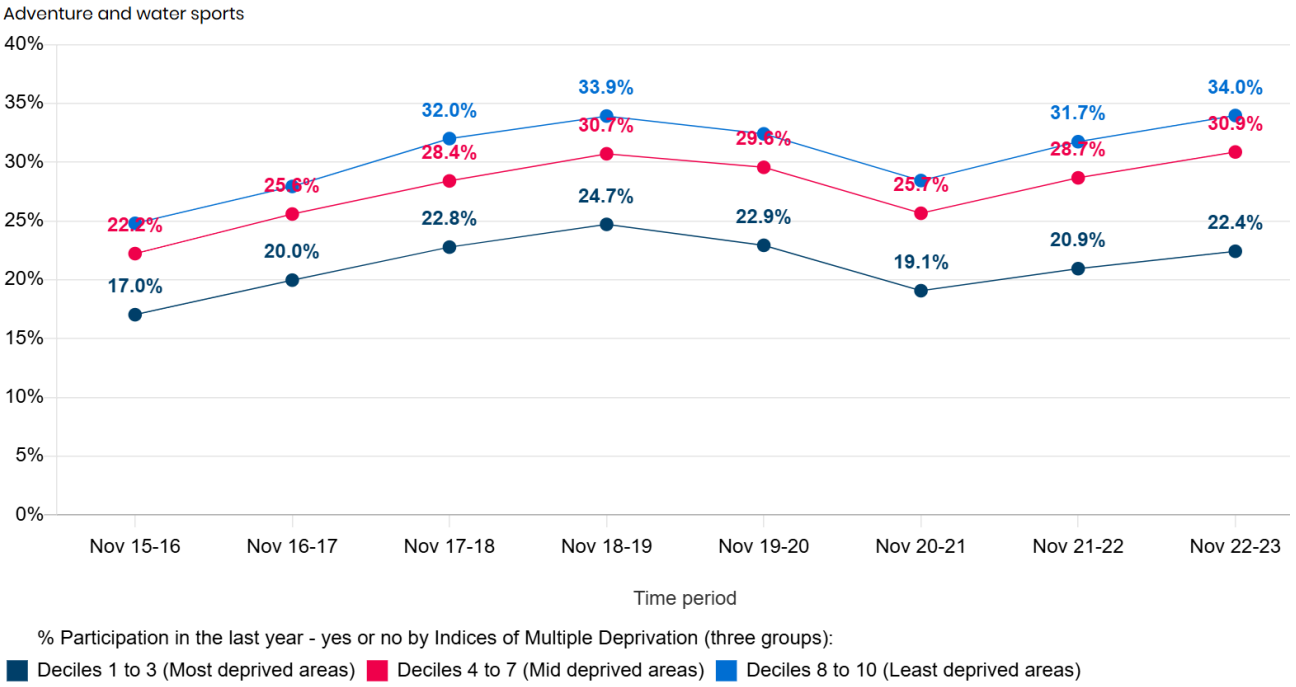
2.11.1 For this section, the sporting activities that show the most visible and notable trends have been focused on in the trend analysis.

2.11.2 The Index of Multiple Deprivation (IMD) is a widely used measure that ranks every small area in England from most to least deprived. It combines information from seven different domains, including income, employment, health, education, crime, housing, and environment, to provide an overall deprivation score. Areas are then split into ten groups called "deciles":

- Decile 1: The most deprived 10% of areas
- Decile 10: The least deprived 10% of areas

2.11.3 So, when looking at trends by IMD decile, we're comparing participation between people living in the most deprived areas and those in the most affluent.

Figure 1.21: Trends in Participation in Adventure and water sports by Index of Multiple Deprivation (IMD) (Ages 16+), 2015–2023 (Active Lives Data)



2.11.4 This graph provides a clear picture of how participation in adventure and water sports varies depending on levels of deprivation, as measured by the Index of Multiple Deprivation (IMD). In this graph, the data is grouped into three categories: deciles 1-3 (most deprived), deciles 4-7 (mid deprived), and deciles 8-10 (least deprived).

2.11.5 One of the most notable findings is the persistent gap in participation between the least and most deprived areas. People living in the least deprived areas (deciles 8 to 10) have the highest rates of participation throughout the period, starting at 28.2% in 2015-16 and rising to 34.0% by 2022-23. Their participation rises to 33.9% in 2018-19, dips during the pandemic to 31.7% in 2021-22, but quickly rebounds to above pre-pandemic levels.

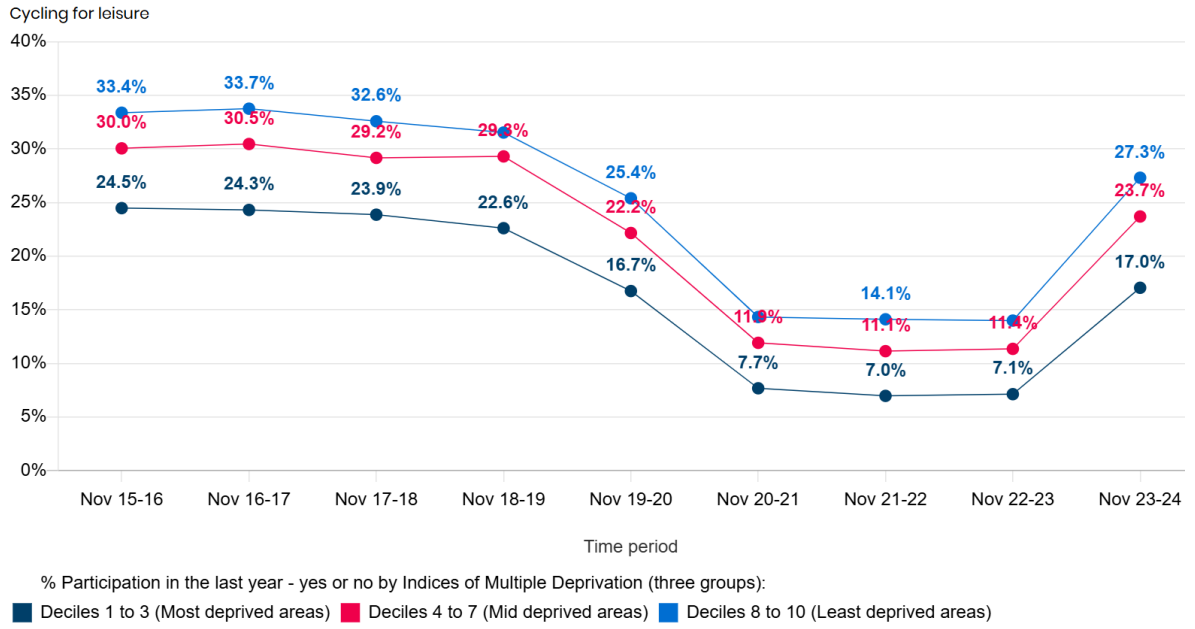
2.11.6 The mid-deprived areas (deciles 4 to 7) also show a steady increase, from 22.2% in 2015-16 to 30.7% in 2022-23. Their trend closely follows that of the least deprived group, with a peak before the pandemic, a noticeable dip in 2020-21, and a strong recovery afterward.

2.11.7 In contrast, the most deprived areas (deciles 1 to 3) consistently have the lowest participation rates. Starting at just 17.0% in 2015-16, the rate climbs to 24.7% in 2018-19, but the pandemic causes a significant drop to 19.1% in 2020-21. Even by 2022-23, participation only recovers to 22.4%, still well behind the other groups.

2.11.8 The overall pattern is clear: while participation in adventure and water sports has grown across all groups, those living in more affluent areas are much more likely to take part. The pandemic temporarily reduced participation for everyone, but the least deprived areas bounced back more quickly and strongly, widening the gap once again.

2.11.9 These trends highlight the ongoing challenge of making adventure and water sports accessible to all. Barriers such as cost, access to facilities, and awareness may be holding back participation in more deprived areas.

Figure 1.22: Trends in Participation in Cycling for leisure by Index of Multiple Deprivation (IMD) (Ages 16+), 2015–2023 (Active Lives Data)



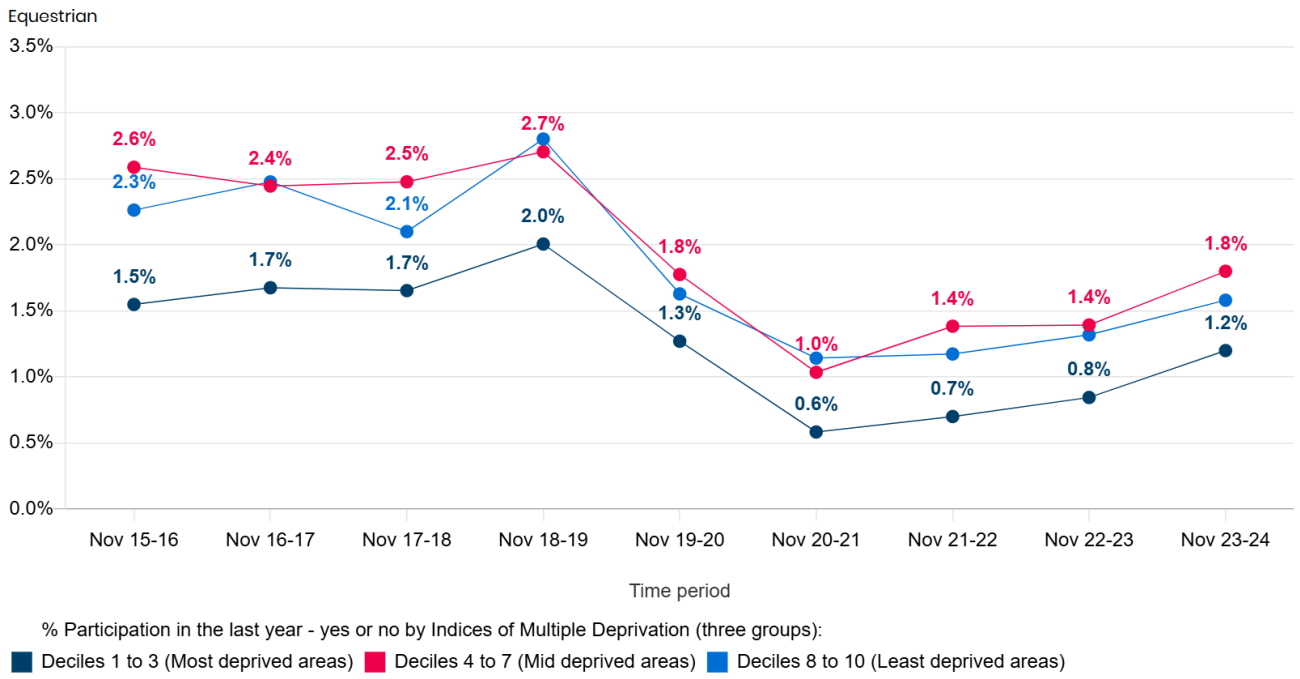
2.11.10 This graph clearly shows that people living in the least deprived areas have consistently higher rates of weekly leisure cycling compared to those in more deprived areas. For instance, in 2015-16, about a third (33.4%) of adults in the least deprived areas cycled weekly for leisure, while in the most deprived areas, the figure was closer to a quarter (24.5%). This gap in participation has remained fairly steady over the years, highlighting a persistent inequality in who participates in cycling as a leisure activity.

2.11.11 The pandemic had a noticeable impact on these trends. From 2019-20 to 2020-21, participation dropped sharply across all deprivation groups, but the decline was steepest in the most deprived areas. Cycling rates in these communities fell to less than a third of their pre-pandemic levels, while the least deprived areas also saw a drop but not as severe. This suggests that the pandemic and related restrictions hit deprived communities harder in terms of leisure cycling.

2.11.12 Since then, there has been a partial recovery. By 2023-24, cycling participation bounced back somewhat, especially in the least deprived areas, which saw rates climb back to over a quarter of adults cycling weekly. However, the most deprived areas recovered more slowly and are still showing much lower participation rates than pre-pandemic. This uneven recovery means the gap between the most and least deprived groups, which briefly narrowed during the pandemic, has started to widen again.

2.11.13 These patterns have important implications. The persistent participation gap points to ongoing barriers faced by people in deprived areas, whether that's a lack of safe cycling infrastructure, fewer affordable bike options, or less encouragement to cycle. The slower recovery after the pandemic underscores how inequalities can deepen when external events occur. To address this, policies and programs need to focus on making cycling more accessible and appealing in deprived communities. Investments in infrastructure, bike-sharing schemes, and community outreach could help close the gap, making cycling a more inclusive activity that benefits everyone's health and wellbeing.

Figure 1.23: Trends in Participation in Equestrian by Index of Multiple Deprivation (IMD) (Ages 16+), 2015–2023 (Active Lives Data)



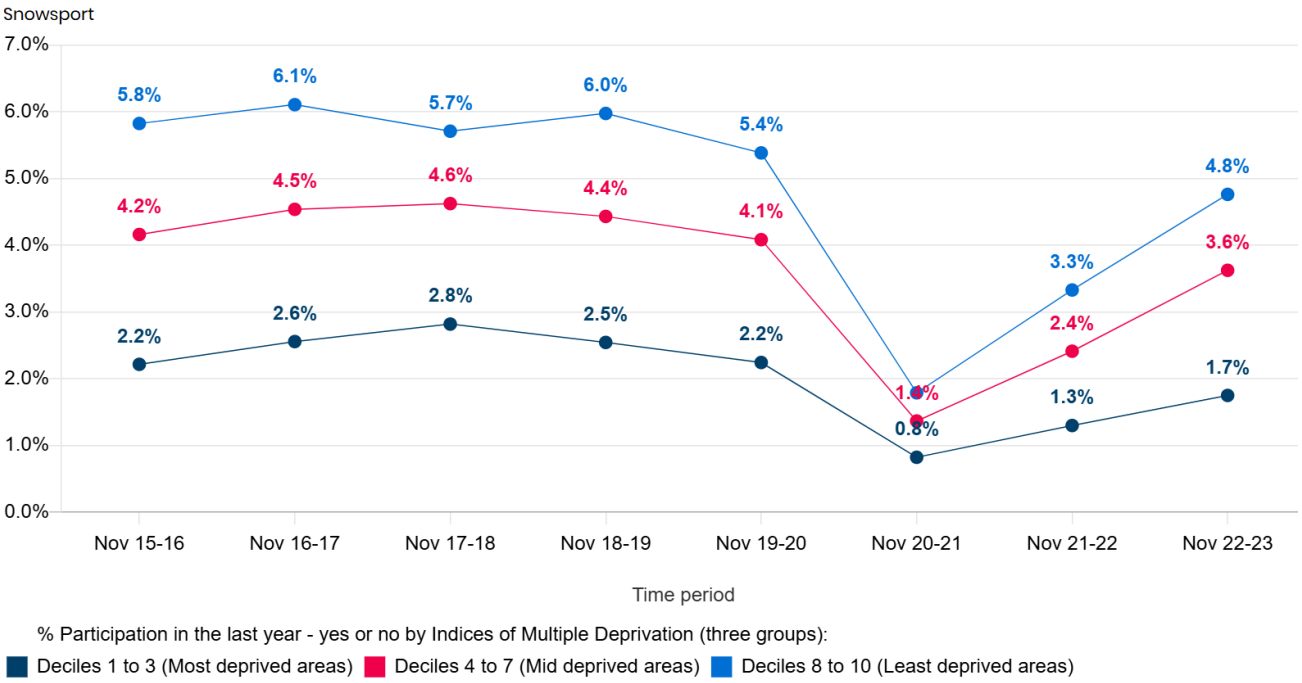
2.11.14 This graph highlights clear disparities in equestrian participation across different levels of deprivation in England over time. People living in mid-deprivation areas (deciles 4-7) often reported the highest participation rates throughout the period, peaking at 2.7% in 2018-19. Although there was a noticeable drop across all groups during the 2020-21 period, linked to pandemic-related restrictions, participation in mid-deprivation areas has recovered slightly, returning to 1.8% in 2023-24.

2.11.15 In contrast, those living in the most deprived areas (deciles 1-3) have consistently shown the lowest participation in equestrian activities. While there was a modest peak at 2.0% in 2018-19, participation in this group dropped sharply during the pandemic and has remained lower than other groups, ending at just 1.2% in 2023-24.

2.11.16 Interestingly, participation among those in the least deprived areas (deciles 8-10) tends to sit between the other two groups. This group's participation also hasn't returned to earlier levels.

2.11.17 These patterns suggest that while Equestrian has a broad appeal, socioeconomic factors, particularly levels of deprivation, play a notable role in determining who participates. Barriers such as cost, access to facilities, and cultural familiarity with the sport may disproportionately affect those in more deprived communities.

Figure 1.24: Participation in Snowsport by Index of Multiple Deprivation (IMD) (Ages 16+), 2015–2023 (Active Lives Data)



2.11.18 This graph highlights clear and persistent differences in Snowsport participation across areas with varying levels of deprivation, as measured by the IMD. In this graph, the data is grouped into three categories: deciles 1-3 (most deprived), deciles 4-7 (mid deprived), and deciles 8-10 (least deprived).

2.11.19 The most striking finding is the consistent gap between the least and most deprived areas. People living in the least deprived areas (deciles 8-10) have the highest participation rates in Snowsport throughout the period, ranging from 5.4% to 6.1% before the pandemic. Even after a sharp drop to 1.9% in 2020-21, participation in these areas rebounded to 4.8% by 2022-23, although it still hasn't fully recovered to pre-pandemic levels.

2.11.20 In contrast, those in the most deprived areas (deciles 1-3) have much lower participation rates, hovering around 2.2% to 2.8% before the pandemic, dropping to just 0.8% in 2020-21, and only recovering to 1.7% by 2022-23. The mid-deprived group (deciles 4-7) sits between the two, with participation rates generally around 4.1% to 4.6% pre-pandemic, dipping to 1.4% in 2020-21, and recovering to 3.6% in the most recent reporting year.

2.11.21 The pandemic clearly had a significant impact across all groups, with participation dropping sharply in 2020-21. While all groups have seen some recovery, the gap between the most and least deprived areas remains pronounced. This pattern suggests that Snowsport remains far more accessible to those living in more affluent areas, likely due to factors such as cost, access to facilities, and broader lifestyle differences.

2.12 IMD Trends in Other Outdoor Sporting Activities

Angling

2.12.1 Interestingly, the differences in participation between deprivation levels are relatively small. While mid-deprivation areas (deciles 4-7) consistently report the highest participation rates, most and least deprived areas follow closely behind. By 2023-24, all three groups converge around similar levels, with only a 0.4 percentage point gap separating the highest (1.7%) and lowest (1.3%) rates.

2.12.2 This lack of a pronounced gap suggests that deprivation status does not have as major of influence on angling participation compared to other sports. Angling may be perceived as more accessible across different socioeconomic groups, possibly due to lower participation costs or availability of natural spaces. While overall participation has dipped since pre-pandemic levels, the relatively even spread across deprivation levels highlights angling's potential as an inclusive outdoor activity.

Running, Athletics or Multi-Sports

2.12.3 Looking at the trends in running participation across different levels of deprivation, one of the most striking things is how similar the rates are between the groups. While the least deprived areas (Deciles 8 to 10) do tend to have slightly higher participation, the gap isn't huge. Typically, only a few percentage points separate the most deprived, mid, and least deprived groups throughout the period from 2015 to 2024.

2.12.4 Overall, this suggests that running is a relatively accessible activity, with participation not strongly divided by deprivation. The fact that all groups experienced similar ups and downs over the years points to broader factors, like the impact of the pandemic, impacting everyone in a similar way, rather than persistent inequalities shaping who goes running. This could be a indicative of running, compared to some other activities, being less dependent on access to facilities or expensive equipment, making it more evenly spread across communities.

Walking for Leisure

2.12.5 Across 2015-2016 to 2023-2024, participation rates are high across all groups, regardless of deprivation. Even in the most deprived areas, over 65% of people reported taking part in this activity each year, while in the least deprived areas, the figure is generally around 80% or higher. The mid deprived group sits in between these two values at approximately 70% across the period.

2.12.6 Interestingly, the differences between the groups are relatively modest. While the least deprived areas consistently have the highest participation, the gap between them and the most deprived areas is usually about 15 percentage points, not insignificant, but not a dramatic divide either, especially compared to some other activities. The overall trends are similar too: all three groups see a gradual rise in participation from 2015 up to around 2021, peaking during that period, and then a slight dip in the last couple of years. This suggests that factors influencing participation are having similar impacts across the board.

3 Participation in Outdoor Sporting Activities Among Children (5-16 years)

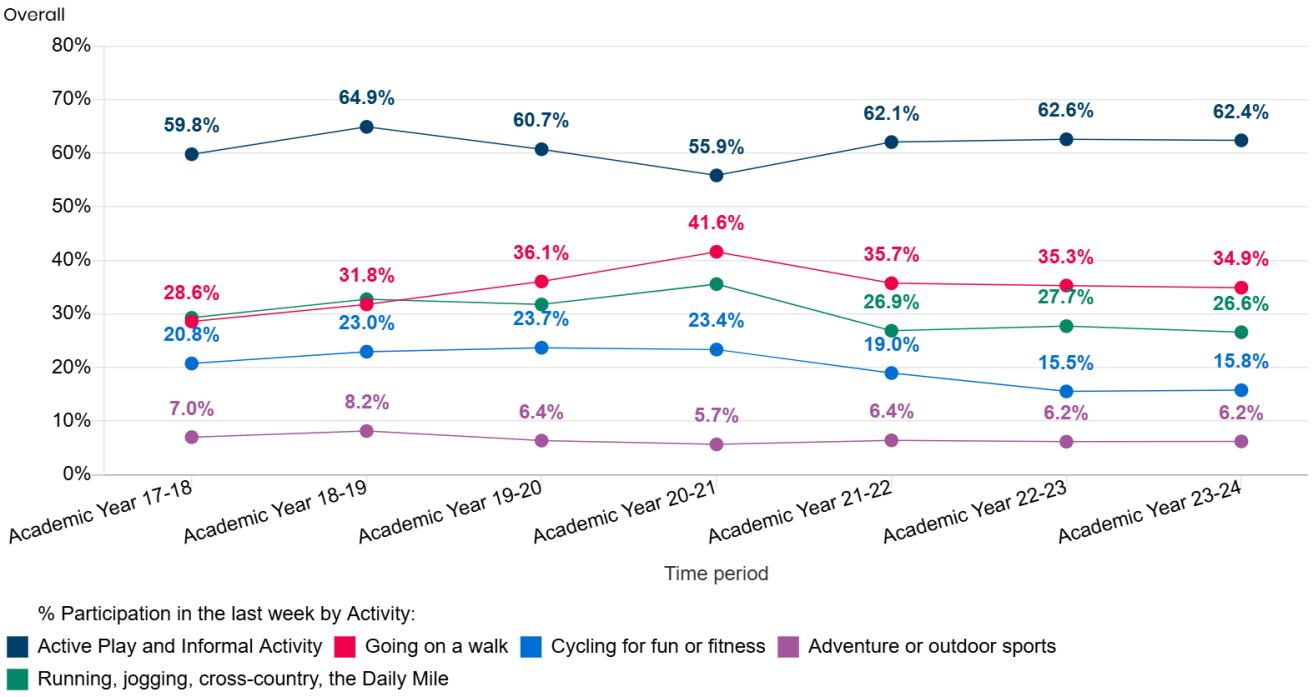
3.1.1 We have used the Active Lives groups for children (5-16 years) that cover outdoor sporting activity. These are the following:

- Active Play and Informal Activity
- Going on a walk
- Cycling for fun or fitness
- Running, Athletics or multi-sports
- Adventure or outdoor sports
- Water sports
- Horse Riding
- Running, jogging, cross-country, the Daily Mile
- Snow sports

3.1.2 When displaying the data in graph format, these sporting activities have been split into 2 groups. One group being the sporting activities that attract typically high numbers of participants and the other group being those sporting activities which typically attract fewer participants. The latter is made up of Horse Riding, Snow sports and Water sports.

3.2 Weekly Participation Across Overall Population

Figure 1.25 Participation in higher participation Outdoor Sporting Activity (Ages 5-16), 2015–2023 (Active Lives Data)



3.2.1 This graph shows weekly participation trends in higher participation outdoor sporting activities among children and young people aged 5 to 16, from the academic year 2017-18 through 2023-24.

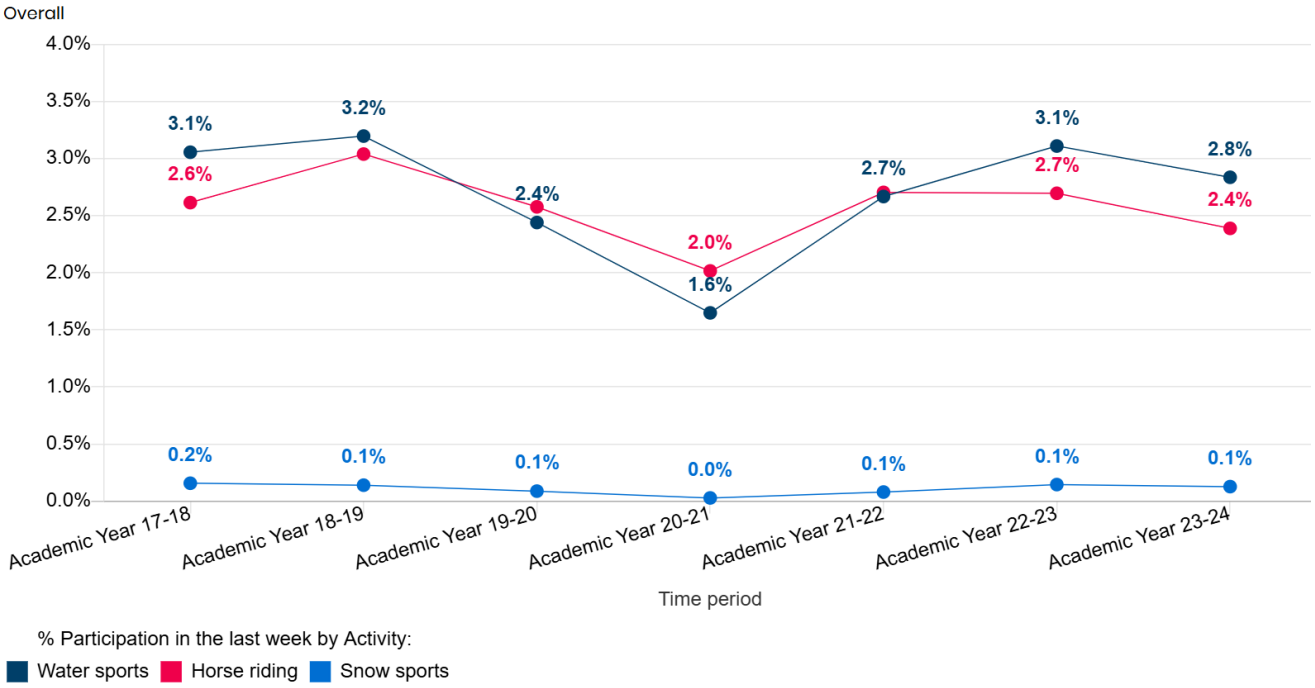
3.2.2 Looking at the graph, it is clear that participation in outdoor sporting activities varies by type, but there aren't any huge gaps between the main activities over the years. "Active Play and Informal Activity" consistently has the highest participation rates, hovering around 60% across all academic years, with only minor fluctuations. This shows that most children are regularly active in some informal way, and this trend has stayed stable.

3.2.3 "Going on a walk" is also a popular activity, with participation rising gradually from about 29% in 2017-18 to a peak of over 41% in 2020-21, likely reflecting the impact of the pandemic when walking became a popular way to get outside and be active. After that, it settles back to around 35%. The changes here are noticeable, but not dramatic, and walking remains a common activity for many.

3.2.4 "Cycling for fun or fitness" and "running, jogging, cross-country" has similar patterns, with participation rates generally between 15% and 23%. These activities see some ups and downs, but the differences from year to year are relatively small, and there's no big gap between them. Participation in "adventure or outdoor sports" is the lowest, staying around 6-8% throughout the period, but again, the numbers are quite steady.

3.2.5 Overall, most activities see steady participation, and even the less popular ones have relatively consistent participation. This suggests that outdoor activity is accessible and appealing to a wide range of children and young people.

Figure 1.26: Participation in lower participation Outdoor Sporting Activity (Ages 5-16), 2017–2024 (Active Lives Data)



3.2.6 Compared to the previous graph showing participation in outdoor activities with typical higher engagement such as "going for a walk" and "active play", this graph highlights sports with much lower weekly participation among young people aged 5-16 across 2017-2024. The difference is significant: while activities such as "going for a walk" attract over a third of children each week, water sports, horse riding, and snow sports each less than 4% participation.

3.2.7 Looking at the trends, water sports consistently have the highest participation out of these three sporting activities, ranging from approximately 1.6% to 3.2% over the years. There's a noticeable dip during the 2020-21 academic year, reflecting the impact of COVID-19 restrictions, but participation rebounds quickly to pre-pandemic levels.

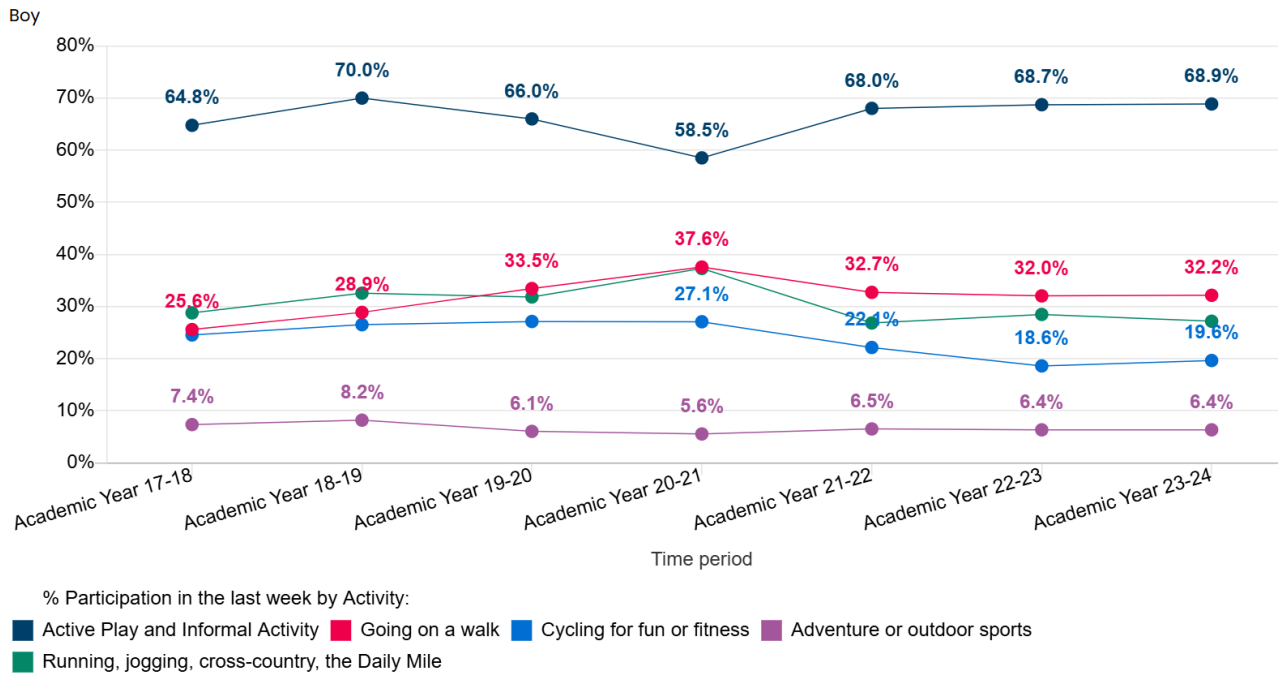
3.2.8 Horse riding follows a similar pattern, with rates generally between 2% and 2.7%, experiencing a dip during the pandemic before recovering. Interestingly, the gap between water sports and horse riding is quite small, and their trends closely mirror each other, suggesting that interest and access to these activities are fairly steady and not dramatically different.

3.2.9 Snow sports have the lowest participation by far, consistently around 0.1%, even dropping to 0% in 2020-21. This may be due to limited opportunities for snow sports in most parts of the country.

3.2.10 Overall, the key finding is that, unlike the higher participation activities, these lower participation sports have very modest yet stable engagement rates, with only minor fluctuations from year to year. There aren't any major gaps between water sports and horse riding, and both remain less participated activities.

3.3 Gender

Figure 1.27: Participation in higher participation Outdoor Sporting Activity for boys (Ages 5-16), 2015–2023 (Active Lives Data)

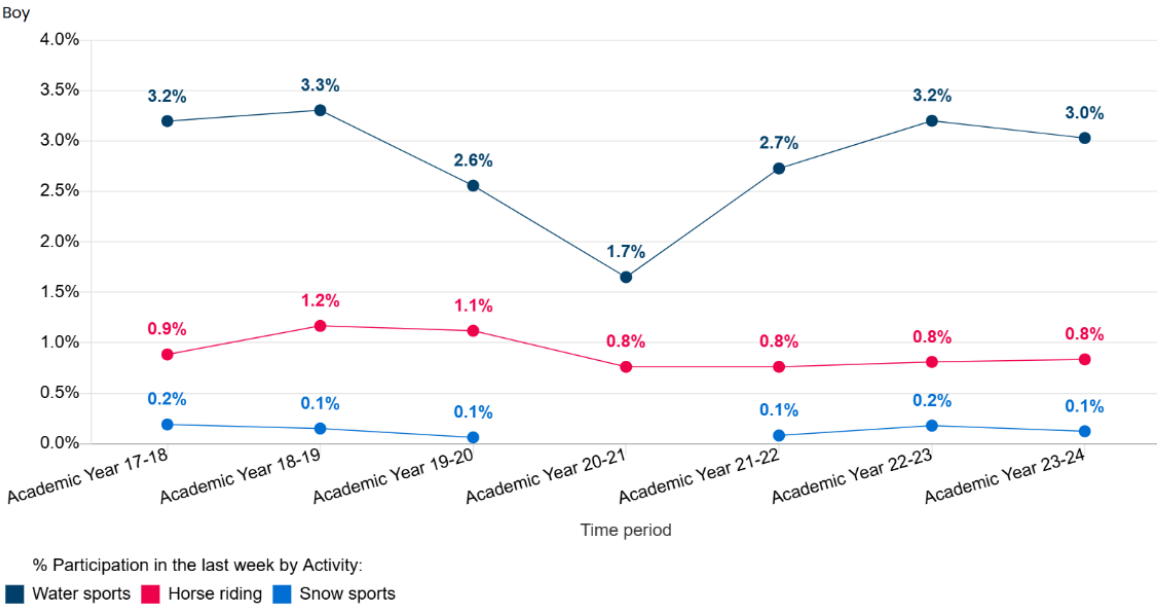


3.3.1 The graph illustrates the percentage of boys participating in typically high engaged outdoor physical activities over the academic years 2017-18 to 2023-24. "Active Play and Informal Activity" consistently had the highest participation rates, starting at 64.8% in 2017-18 and peaking at 70% in 2018-19, before experiencing a decline to 58.5% in the pandemic and then stabilizing at just below 70% in the most recent years. This suggests that informal and unstructured play remains the most popular form of physical activity among boys.

3.3.2 Activity rates for "going on a walk" and "running, jogging, cross-country, the Daily Mile" had similar trends, with both activities showing a gradual increase up to 2020-21, with "going on a walk" reaching a peak near to 40%. Following 2020-21, participation in both activities declined, stabilising at just above 30% for "going on a walk" and just below 30% for running-related activities by 2023-24. This pattern may reflect changing interests or external factors influencing outdoor activity levels during these years.

3.3.3 "Cycling for fun or fitness" saw a modest but steady participation rate, with a slight increase until 2020-21, followed by a gradual decline, ending at around 20% in 2023-24. In contrast, "adventure or outdoor sports" consistently had the lowest participation rates throughout the period at between 5% and 7%, which is consistently low compared to the other outdoor sporting activities presented in the graph.

Figure 1.28: Participation in lower participation Outdoor Sporting Activity for boys (Ages 5-16), 2017–2024 (Active Lives Data)



3.3.4 This graph shows weekly participation rates for boys aged 5–16 in three lower participation outdoor sports: water sports, horse riding, and snow sports, over the academic years 2017–18 to 2023–24.

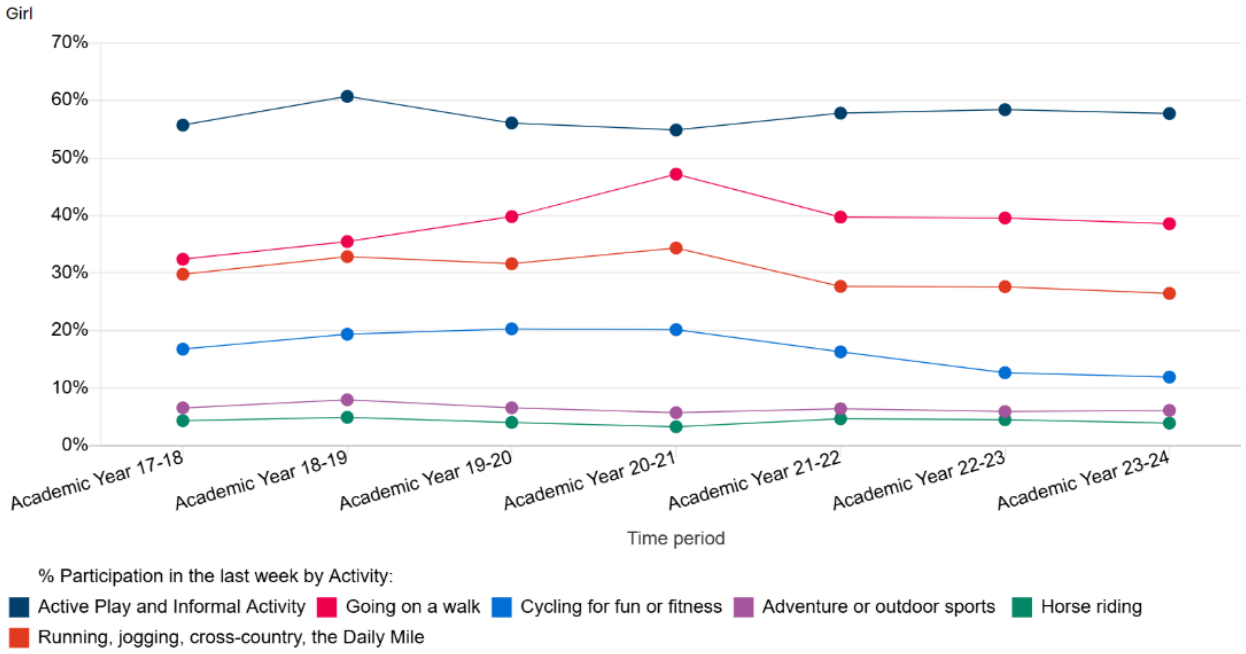
3.3.5 Focusing on horse riding, participation among boys has remained quite steady and low throughout the period. The highest rate was 1.2% in 2018–19, and for most years, it hovers just below or at 1%. There's a slight dip during the pandemic year (2020–21) down to 0.8%, and participation has stayed at that level ever since. Overall, the numbers show that horse riding is a niche activity for boys, with little change over time and no major spikes or drops outside of the pandemic impact.

3.3.6 Participation in water sports fell to 1.7% in 2020-21, and then gradually recovered to 3.0% by 2023-24. This indicates that while water sports are not frequently participated in, interest is returning as opportunities become more available post-pandemic.

3.3.7 Snow sports participation remains very low throughout the reported period, never exceeding 0.2%. There is a complete decline to zero in 2020-21, likely due to the closure of facilities and travel restrictions, and only a minimal recovery afterward. This highlights that snow sports are a low participation activity for boys in this age group, possibly due to factors like cost, accessibility, and the seasonal nature of the sport.

3.3.8 These findings indicate that traditional and informal activities are favoured, and more specialised or less accessible sports attract significantly fewer participants among boys.

Figure 1.29: Participation in higher participation Outdoor Sporting Activity for girls (Ages 5-16), 2017–2024 (Active Lives Data)

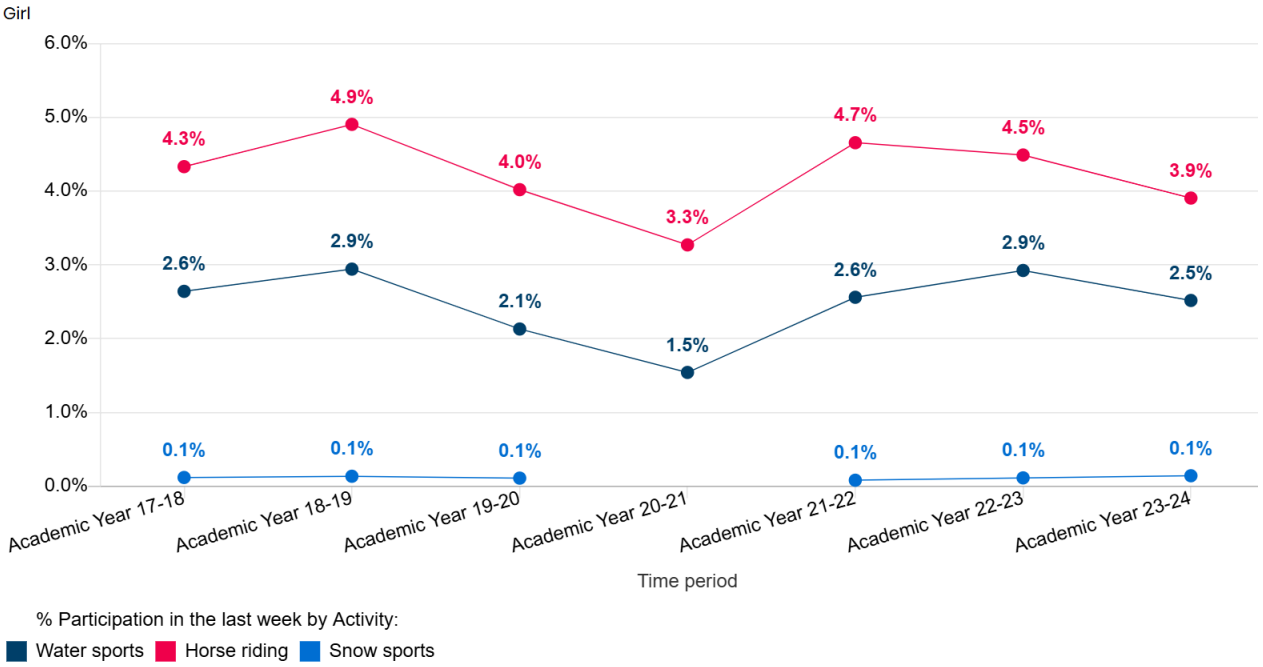


3.3.9 The graph illustrates the percentage of girls participating in typically high engaged outdoor physical activities over the academic years 2017-18 to 2023-24. "Active Play and Informal Activity" consistently had the highest participation rates, remaining consistently around 60%. This suggests that informal and unstructured play remains the most popular form of physical activity among girls.

3.3.10 "Going on a walk" and "running, jogging, cross-country, the Daily Mile" followed similar trends but with "going on a walk" consistently having higher rates of participation. Both activity groups have a peak in 2020-21, with "going on a walk" reaching nearly to 50%. Following 2020-21, participation in both activities declined, stabilising at just below 40% for "going on a walk" and just below 30% for running-related activities by 2023-24. This pattern may reflect changing interests or external factors influencing outdoor activity levels during these years.

3.3.11 "Cycling for fun or fitness" saw a modest but steady participation rate up to the pandemic, with a slight increase during 2020-21. But this was then followed by a decline, ending at around 12% in 2023-24. In contrast, "adventure or outdoor sports" and "horse riding" consistently had the lowest participation rates throughout the period at below 10%, which is consistently low compared to the other outdoor sporting activities presented in the graph.

Figure 1.30: Participation in lower participation Outdoor Sporting Activity for girls (Ages 5-16), 2017–2024 (Active Lives Data)



3.3.12 This graph tracks weekly participation in three lower-participation outdoor sports: water sports, horse riding, and snow sports among girls aged 5–16 from 2017–18 to 2023–24. What stands out immediately is that, compared to boys, girls are more likely to take part in both horse riding and water sports, with horse riding showing a much higher and more consistent following.

3.3.13 Horse riding is by far the most popular of these three activities for girls, with participation peaking at 4.9% in 2018–19 and staying above 3% every year. Even during the pandemic dip in 2020–21, participation only dropped to 3.3%, before bouncing back to 4.7% the following year. This is a much higher and more stable rate than we see for boys, where horse riding participation never rises above 1.2%. Clearly, horse riding holds a stronger appeal for girls.

3.3.14 Water sports also see higher participation among girls than boys, with rates ranging from 1.5% to 2.9% over the years. The trend is steady, with a dip during the pandemic, but overall, water sports maintain a small but consistent participation rates. Again, this is noticeably higher than the rates for boys, where participation in water sports is generally below 1.5%.

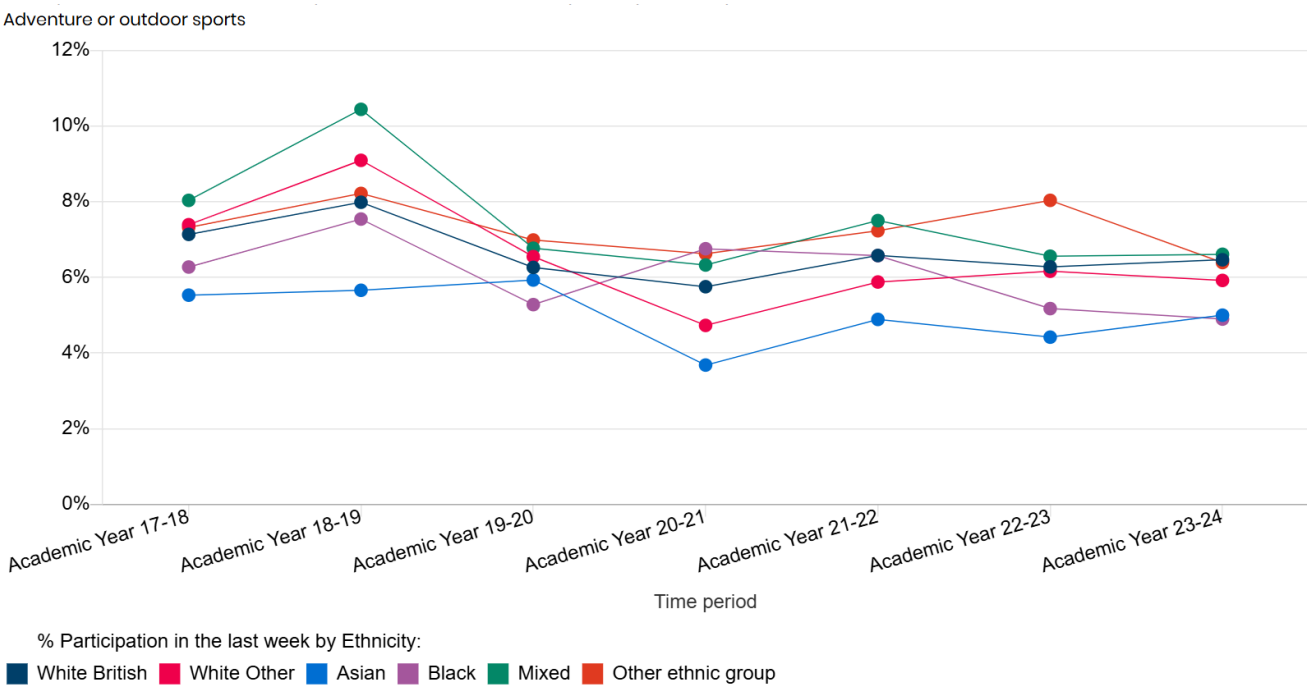
3.3.15 Snow sports, on the other hand, have very low participation for both girls and boys, with rates flatlining at 0.1% throughout the period. This suggests that snow sports remain a niche activity for young people in general, likely due to limited access and opportunities.

3.3.16 In summary, while participation in these outdoor sports is generally low, girls are much more likely than boys to take part in horse riding and water sports. Horse riding stands out as a distinctive activity for girls, maintaining a steady and relatively high level of engagement compared to the other lower-participation sports.

3.4 Ethnicity

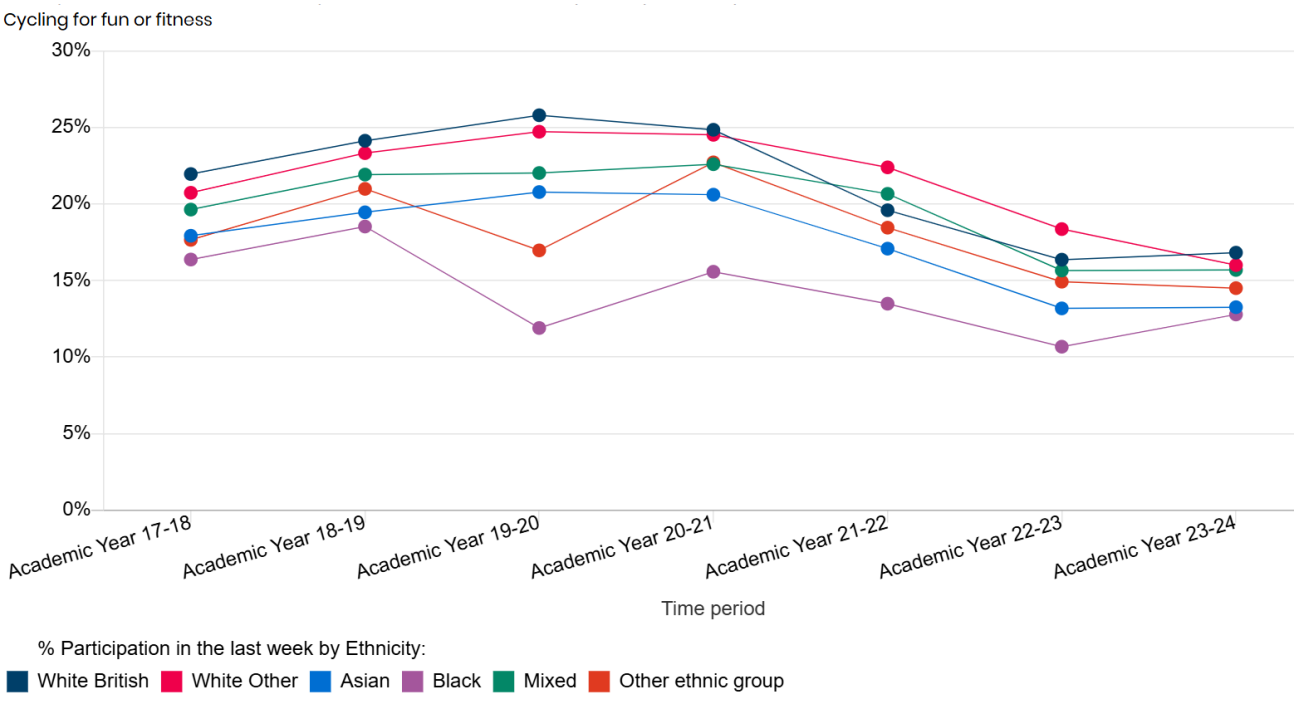
3.4.1 For this section, the sporting activities that show the most visible and notable trends have been focused on in the trend analysis.

Figure 1.31: Trends in Participation in Adventure or Outdoor Sports by Ethnicity (Ages 5-16), 2017–2024 (Active Lives Data)



3.4.2 Participation in adventure or outdoor sports is generally highest among "Mixed" and "White Other" ethnicity groups, especially in the earlier academic years. For example, in 2018-19, children of "Mixed" ethnicity had the highest participation rate, peaking above 10%. "Other ethnic group" and "White Other" groups also show relatively high engagement, while "Black" and "Asian" groups tend to have lower participation rates. All groups experienced a dip in 2020-21, but rates have since stabilised, with the gap between groups narrowing somewhat in recent years. Notably, children who are "Asian" consistently have the lowest participation in this category.

Figure 1.32: Trends in Participation in Cycling for fun or fitness by Ethnicity (Ages 5-16), 2017–2024 (Active Lives Data)



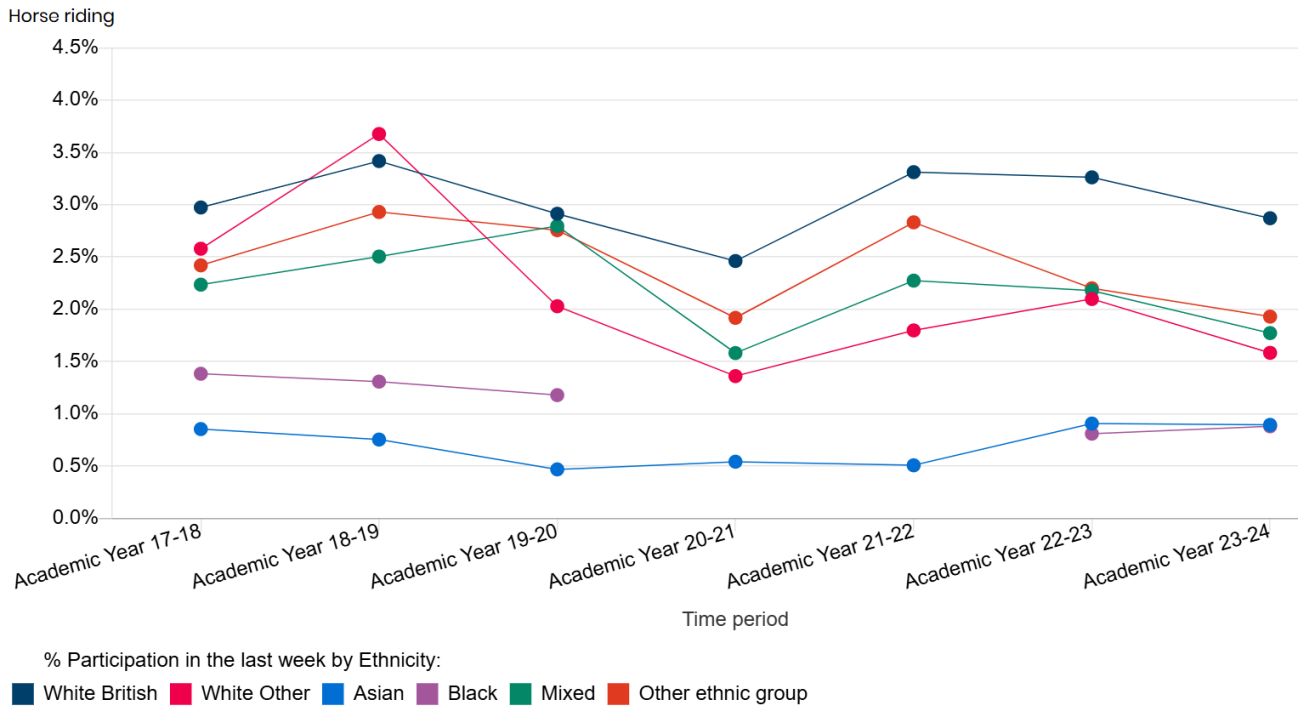
3.4.3 This graph presents a clear overview of weekly cycling participation for leisure or fitness across various ethnic groups from the academic years 2017–18 to 2023–24. A consistent downward trend is evident across all groups, suggesting a general decline in engagement with cycling over time. This pattern may reflect broader societal or environmental factors influencing physical activity levels.

3.4.4 "White British" and "White Other" groups consistently report the highest participation rates throughout the period. However, even these groups experience a notable decline beginning around 2021–22, indicating that the decline in participation is not isolated to any one ethnicity.

3.4.5 Participation among "Asian" groups starts at a lower baseline and follows a similar downward trajectory. The "Mixed" ethnic group maintains relatively stable engagement until around 2020–21, after which participation drops sharply and becomes more variable. The "Other ethnic group" faces a sharp decline in 2019-2020 but rapidly recovers in 2020-2021 to a higher participation level than pre-pandemic. The "Black" ethnic group show the lowest level of participation across the period, before and during 2018-2019, the participation levels were relatively similar to that of other ethnicity groups, however there is a sharp decrease in 2019-2020. Participation numbers have not fully recovered from pre-pandemic, however in the most recent two academic years (2022–23 and 2023–24), there is a small upwards trend.

3.4.6 In the most recent two academic years, participation rates across all groups begin to converge. This narrowing of the gap suggests a potential shift toward more uniform engagement levels, possibly due to shared external influences or targeted interventions aimed at promoting inclusivity in physical activity.

Figure 1.33: Trends in Participation in Horse Riding by Ethnicity (Ages 5-16), 2017–2024 (Active Lives Data)



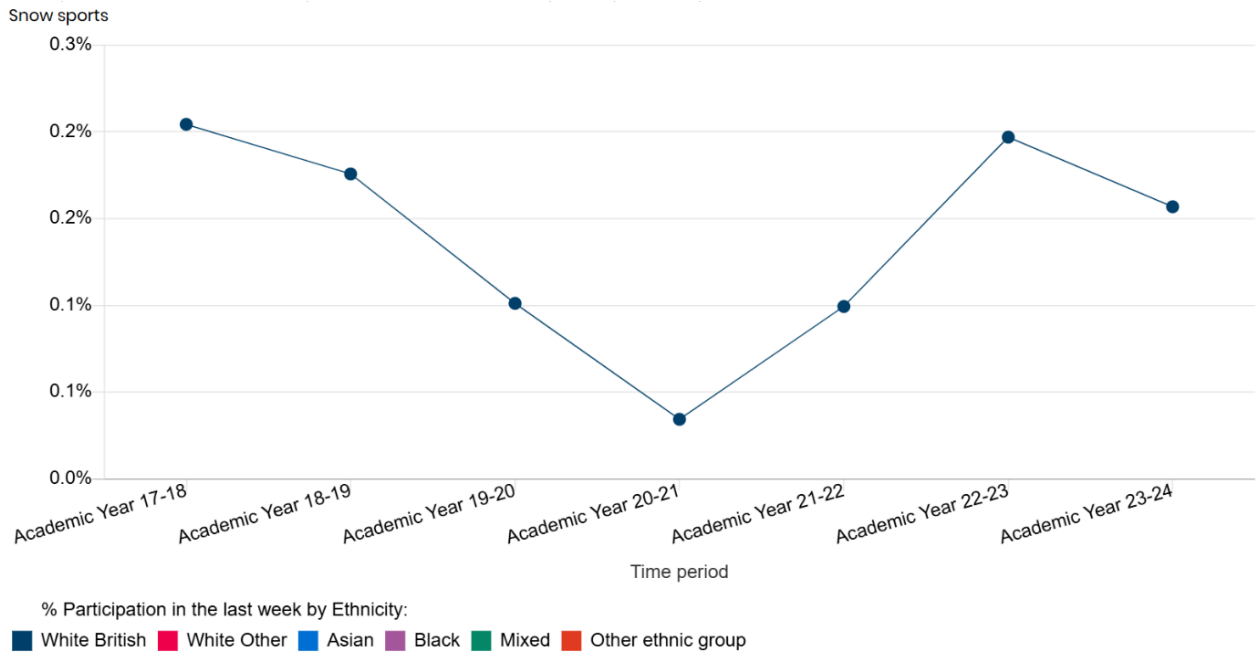
3.4.7 This graph shows the engagement in horse riding across the academic years 2017-2018 to 2023-2024. One of the most consistent patterns is the higher participation rate among "White British" children, who lead across all but one academic years. This group maintains a relatively strong presence in the activity, even as overall participation fluctuates.

3.4.8 A notable peak in horse riding participation occurs around the 2019–20 academic year, affecting nearly all ethnic groups. This spike is followed by a general decline, which may reflect broader societal disruptions during that period. After this drop, participation levels begin to stabilise, with some groups showing modest recovery in the final years of the dataset.

3.4.9 Children from "Asian" and "Black" backgrounds consistently report lower levels of engagement in weekly horse riding compared to their peers. Despite this, the gap between ethnic groups has narrowed in the most recent years (2022–23 and 2023–24), suggesting a trend toward more balanced access or interest. This convergence may point to the impact of outreach efforts or changing perceptions of the sport.

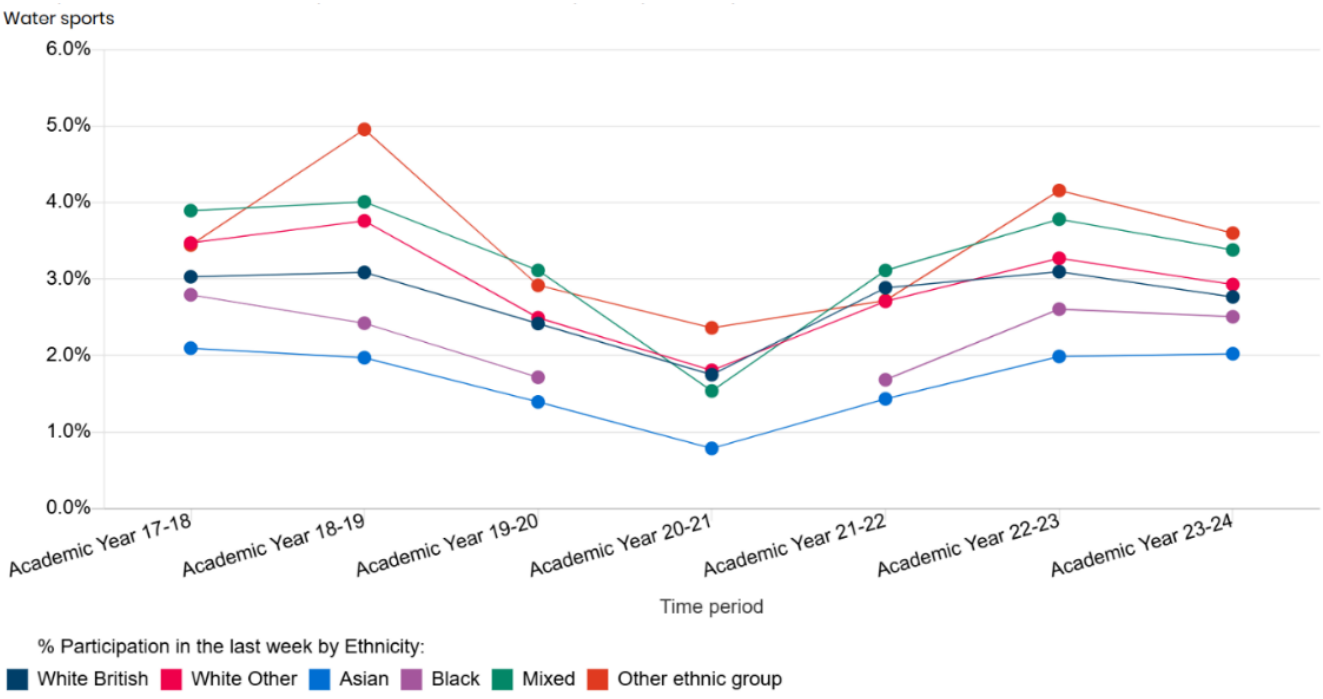
3.4.10 Active Lives data only records participation levels for "White British" children and therefore conclusions cannot be made around snow sports participation across different ethnicities. As shown by the below graph, participation for "White British" children starts at just above 0.2% in 2017-18, dips to nearly zero in 2020-21, and then recovers slightly but remains below 0.2%. The absence of data for other ethnic groups suggests that participation is either extremely low or not recorded.

Figure 1.34: Trends in Participation in Snow sports by Ethnicity (Ages 5-16), 2017–2024 (Active Lives Data)



3.4.11 The trends for water sports are similar across the different ethnicity groups, but with some differences in the rankings. Children from "Other ethnic groups" had the highest participation in most years, with a significant peak in 2018-19 (approximately 5%). "White British", "White Other", and "Mixed" also show strong engagement, while "Black" and "Asian" groups again have the lowest rates. The pandemic caused a sharp drop across all groups in 2020-21, but participation has since rebounded, though the differences between groups remain clear. Overall, "Asian" children are consistently at the bottom, while the "Mixed" group leads the way for participation in water sports.

Figure 1.35: Trends in Participation in Water Sports by Ethnicity (Ages 5-16), 2017–2024 (Active Lives Data)



3.5 Ethnicity Trends in Other Outdoor Sporting Activities

Active Play and Informal Activity

3.5.1 Across the academic years 2017-2018 to 2023-2024, there is a consistent pattern. “White British” participants maintain the highest levels of engagement compared to other ethnic groups, including “White Other”, “Asian”, “Black”, “Mixed”, and “Other ethnic group”.

3.5.2 What stands out most is the relatively small but persistent gap in participation rates between “White British” individuals and those from other ethnic backgrounds. This gap, while not large, is noticeable and consistent, particularly in years such as 2018–19 and 2020–21, where the disparity is slightly more pronounced. Despite these differences, the overall variation in participation across all groups remains small, suggesting a broadly similar level of engagement in active play and informal activities.

3.5.3 The narrowness of the gap indicates that while disparities exist, they are not showing a clear barrier to active play access for any ethnic group. This subtle but steady divide points to the need for further exploration into the factors that may influence participation among different ethnic groups.

Going on a Walk

3.5.4 Across the academic years 2017-2018 to 2023-2024, the data reveals a broadly consistent pattern in engagement, with all groups showing relatively similar levels of participation over time. While “White British” individuals generally report the highest rates, the differences between groups are modest and remain the same throughout the period.

3.5.5 What is particularly noteworthy is the narrow margin separating the ethnic groups. Although “White British” participants tend to lead slightly in walking participation, the gap between them and other groups such as “Asian”, “Black”, “Mixed”, and “White Other” is minimal. These subtle divergences suggests that walking is a relatively accessible and widely adopted activity across communities.

Running, Jogging, Cross-Country, The Daily Mile

3.5.6 Across the academic years 2017-2018 to 2023-2024, the weekly participation data in running-related outdoor activities including jogging, cross-country, and the Daily Mile shows different ethnicity groups report similar levels of engagement. There is a striking similarity in participation levels among all groups.

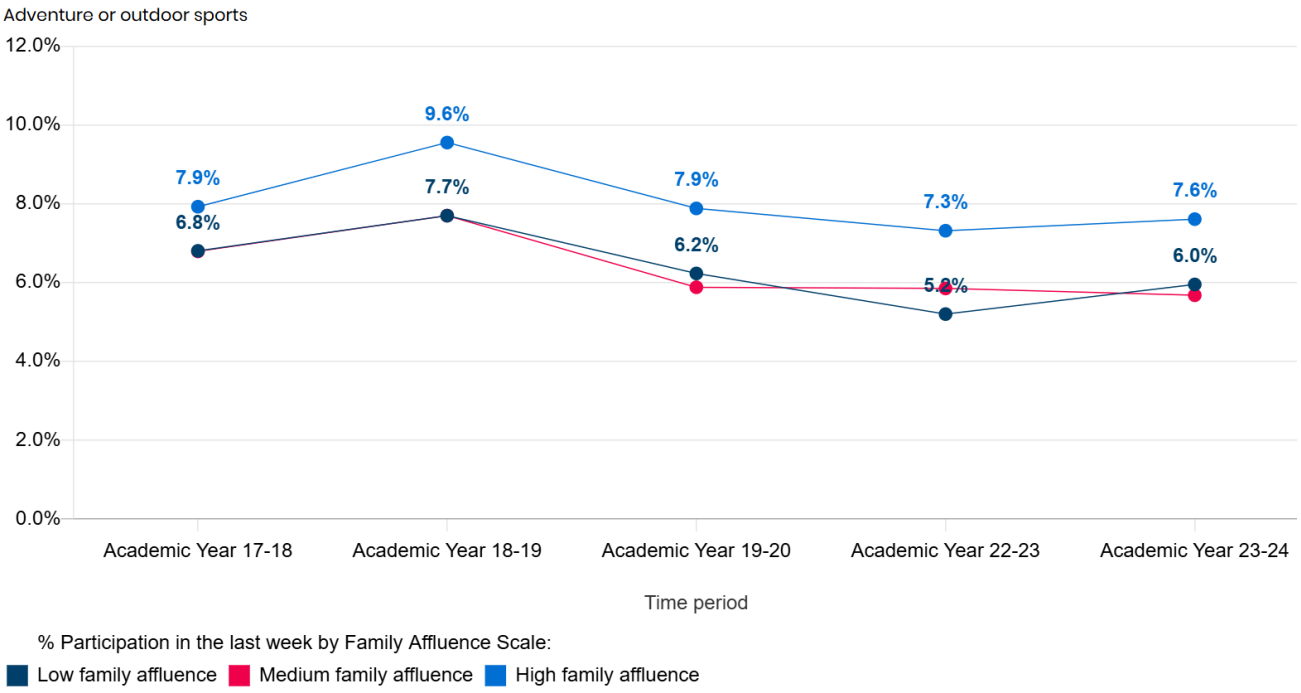
3.5.7 This uniformity mirrors the trends seen in walking participation, where the gap between ethnic groups was also narrow. Just as with walking, running appears to be a broadly inclusive activity, with no single group showing a significant lead or lag in participation numbers. The consistency across years further reinforces the idea that these forms of physical activity are relatively equitable in terms of access and uptake.

3.6 Family Affluence

3.6.1 For this section, the sporting activities that show the most visible and notable trends have been focused on in the trend analysis.

3.6.2 For this section, there is no Active Lives data recorded for the academic years 2020-2021 and 2021-2022. This is likely to be down to being unable to collect this data during COVID-19. What the graphs can tell us, however, is the participation levels by family affluence pre-COVID-19 and post-COVID-19 and the direction that participation levels are taking.

Figure 1.36: Participation in Adventure or Outdoor Sports by Family Affluence (Ages 5-16), 2017–2024 (Active Lives Data)



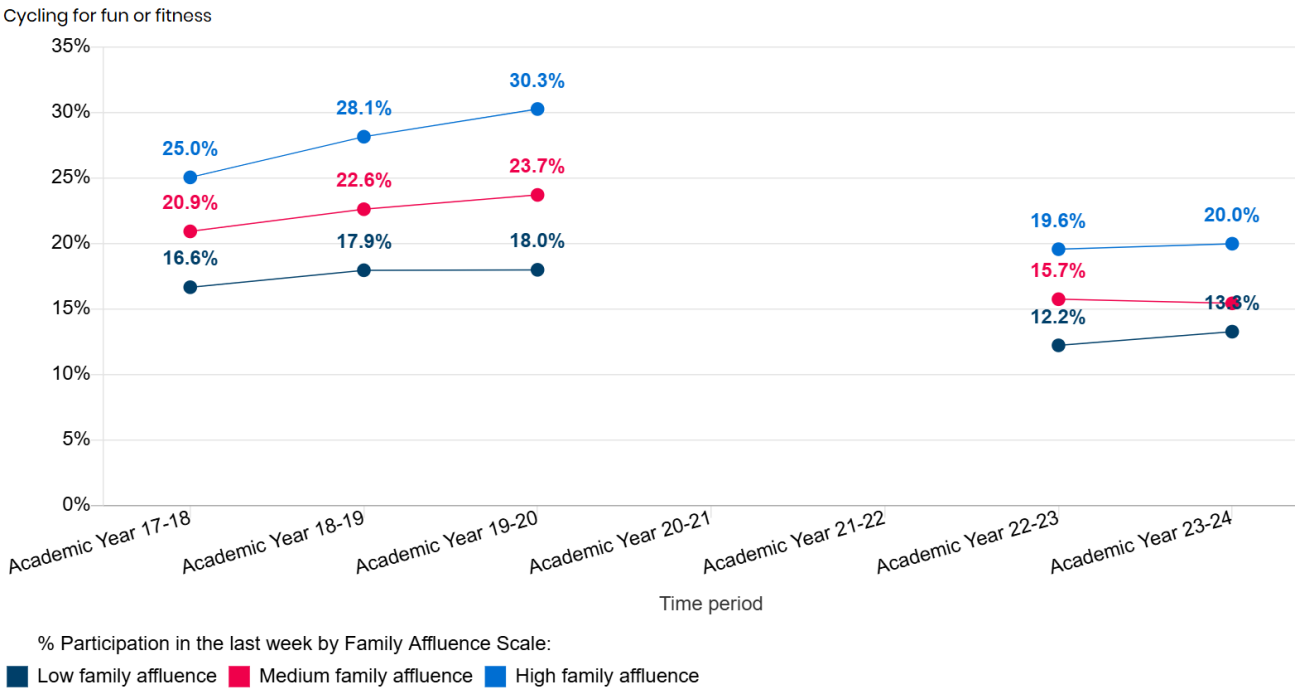
3.6.3 The above graph shows that children from high-affluence families consistently participated in adventure or outdoor sports at higher rates compared to their peers from medium or low-affluence backgrounds. This gap is most noticeable in the 2018–19 academic year, when 9.6% of high-affluence children took part in these activities weekly, compared to 7.7% of those from both medium and low-affluence families.

3.6.4 Across all groups, there's a clear drop in participation starting in the 2019–20 academic year, likely due to the impact of the COVID-19 pandemic. This downward trend continued into 2022–23, with participation reaching its lowest point, particularly for the medium and low-affluence groups, both falling to below 6.0%.

3.6.5 Interestingly, the medium and low-affluence groups followed almost identical trends throughout the years, with little to no differences in their participation rates. This suggests that access or barriers to outdoor sports may be similar for these two groups.

3.6.6 In the most recent year, 2023–24, participation began to recover slightly, especially for high-affluence children, who saw an increase to 7.6%. However, this recovery still hasn't reached the peak levels observed before the pandemic. The gap between high and lower affluence groups also appears to be growing again, pointing to the continued influence of socioeconomic factors on opportunities for outdoor and adventure sport participation.

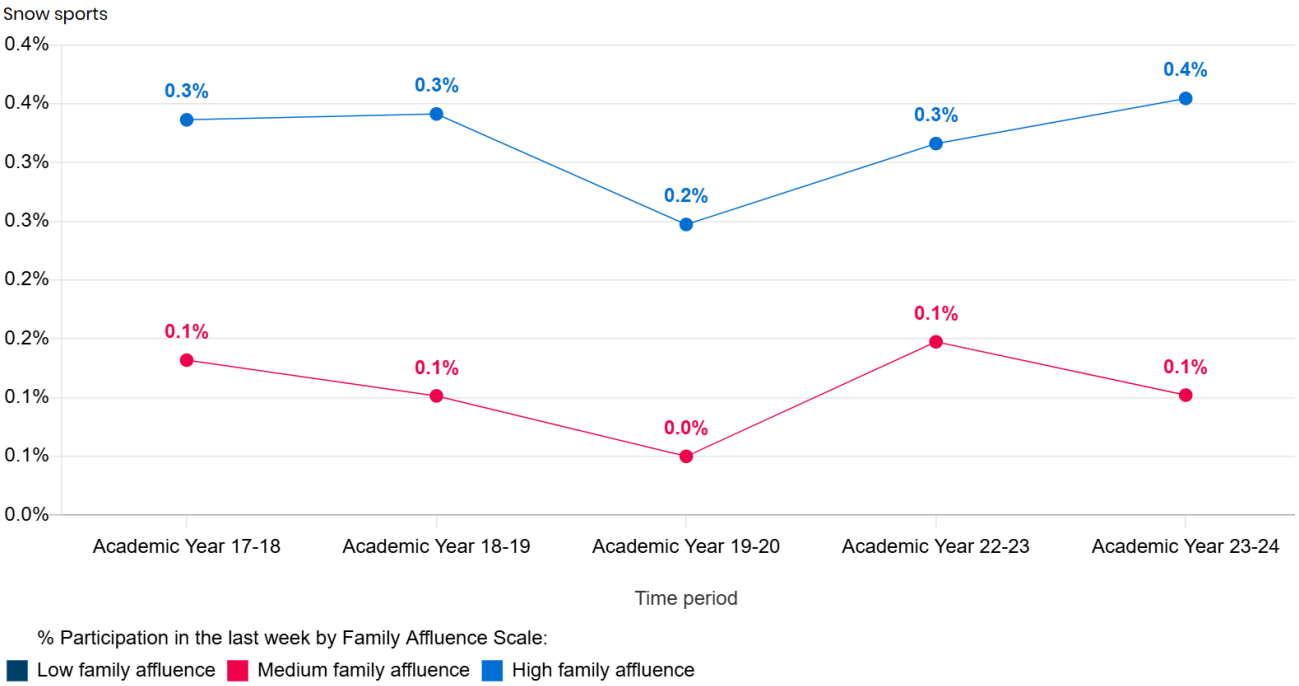
Figure 1.37: Participation in Cycling for fun or fitness by Family Affluence (Ages 5-16), (2017–2024) (Active Lives Data)



3.6.7 The graph presents weekly participation in cycling for fun or fitness among children, segmented by family affluence, from 2017–18 to 2023–24. Across the observed years, children from high-affluence families consistently report the highest participation rates, peaking at 30.3% before declining to 20% in the most recent data point. Medium-affluence children follow a similar trajectory, with participation rising to 23.7% before dropping to 15.7%. Those from low-affluence backgrounds show the lowest engagement throughout, with a modest peak at 18.0% in 2019–20, followed by a sharp decline to 12.2% by 2022–23.

3.6.8 While the overall trend shows a decline in participation across all groups in recent years, the gaps between them are relatively modest, typically within a 5–10 percentage point range. This suggests that although socioeconomic status influences access and engagement, cycling remains a somewhat accessible activity across different income levels. The narrowing differences in later years may reflect broader shifts in lifestyle, infrastructure, or public health messaging that have impacted all groups similarly.

Figure 1.38: Trends in Participation in Snowsport by Family Affluence (Ages 5-16), (2017–2024) (Active Lives Data)

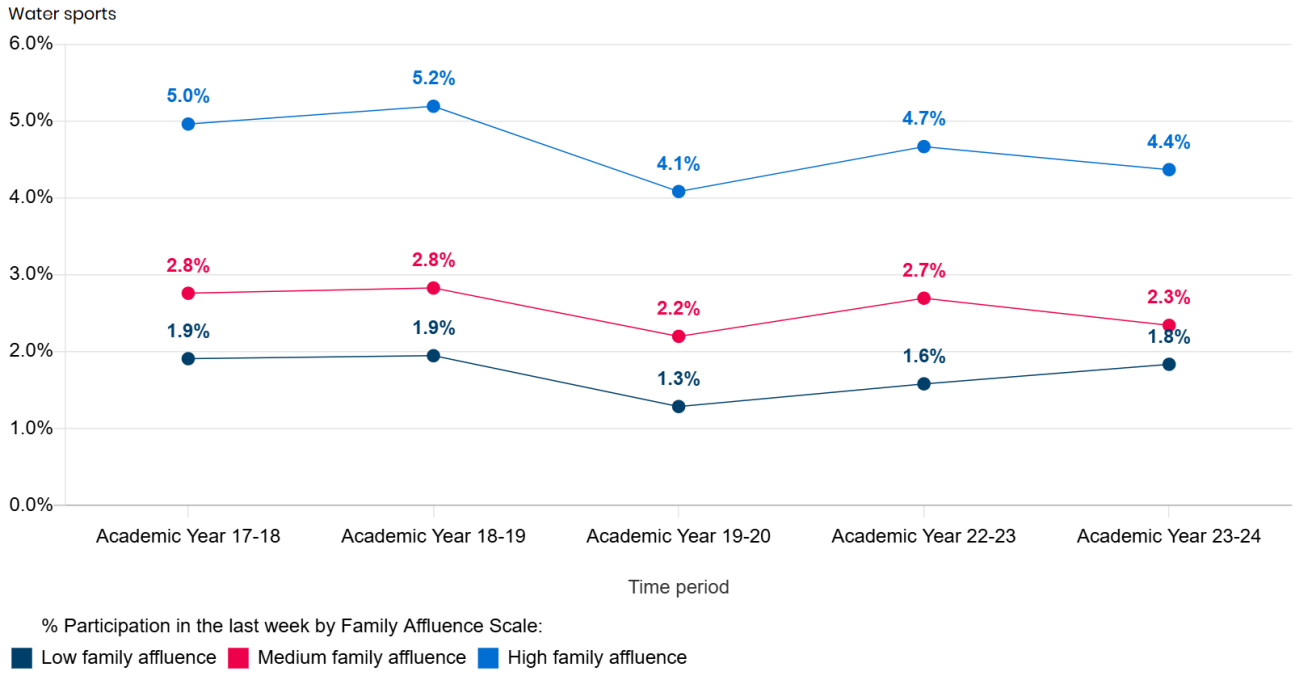


3.6.9 The above graph shows that participation in snow sports is very low across all family affluence groups, especially compared to other activities such as adventure/outdoor and water sports. Children from high-affluence families are the most likely to take part, with participation hovering around 0.3% in most years and reaching a peak of 0.4% in 2023–24. Although this is a slight increase, it's still a small fraction overall.

3.6.10 For medium-affluence children, participation has stayed flat at 0.1% in most years, dipping to 0.0% in 2019–20 before returning to previous levels. There is no recorded participation from low-affluence children in any year, highlighting a clear barrier to access for this group—likely due to the high costs and limited availability of snow sports.

3.6.11 While high-affluence children had participation rates as high as 9.6% for adventure sports and over 5% for water sports at their peaks, snow sports never climbed above 0.4%. This suggests that, even among the wealthiest families, snow sports remain a niche activity, possibly due to seasonal limitations, geographic access, and cost.

Figure 1.39: Trends in Participation in Water Sports by Family Affluence (Ages 5-16), 2017–2024 (Active Lives Data)



3.6.12 The above graph mirrors the trend shown for adventure/outdoor sports: children from high-affluence families have consistently participated in water sports at noticeably higher rates than those from medium or low-affluence backgrounds. Their participation peaked in the 2018–19 academic year at 5.2%, before dipping to 4.1% in 2019-20. Although the numbers have fluctuated since then, they've remained above 4%, ending at 4.4% in 2023-24. This steady trend contrasts with adventure or outdoor sports, where high-affluence participation peaked much higher - at 9.6% - and has shown a stronger rebound in recent years.

3.6.13 Medium-affluence children have maintained a more stable but lower level of participation in water sports, hovering around 2.8% in the earlier years and ending at 2.3% in 2023-24. Their levels haven't shifted dramatically, suggesting consistent but limited access or interest. Similarly, low-affluence children have had the lowest and most inconsistent participation in water sports, dipping to just 1.3% in 2019–20 and recovering slightly to 1.8% most recently.

3.6.14 Overall, the data suggests that family affluence plays a strong role in access to or participation in water sports. Compared to adventure or outdoor sports, participation in water sports is generally lower across all affluence levels, and the gap between high and low affluence remains wide, though more stable over time.

3.7 Family Affluence Trends in Other Outdoor Sporting Activities

Running, Jogging, Cross-country, the Daily Mile

3.7.1 Across the entire period, children from high-affluence families consistently report the highest levels of engagement, peaking at 40% in 2019–20 before declining to 32.2% by 2023–24. Medium-affluence participants follow a similar trend, with a high of 31.8% in 2019–20 and a drop to 27.4% in the final two years. Children from low-affluence backgrounds show more modest participation throughout, rising slightly early on but ultimately falling to 22.8% by the end of the period.

3.7.2 While the overall trend is downward across all groups, the differences between them remain relatively small, typically within a 5–10 percentage point range. This suggests that while affluence influences participation, running-based activities remain comparatively accessible across income levels.

Active Play and Informal Activity

3.7.3 The general trend across the academic years 2015-2016 to 2023-2024 is that children from medium and high-affluence families tend to engage more frequently in active play and informal play activities compared to their peers from low-affluence backgrounds. In 2017–18, for instance, participation among low-affluence children was 56.8%, compared to 62.8% for those from medium-affluence households, a modest but noticeable gap. In 2018–19, high-affluence children reached a participation rate of 68.3%, further highlighting the influence of socioeconomic status.

3.7.4 What is notable, however, is that the differences between groups, while present, are relatively narrow, typically within a 5–10 percentage point range. This suggests that although affluence plays a role, it may not be as dominant a factor in informal or unstructured physical activity as it is in more resource-intensive activities such as horse riding. The small gaps imply that active play remains a relatively accessible form of physical activity across socioeconomic backgrounds, though disparities still exist and warrant attention.

Going on a Walk

3.7.5 Across the observed academic years (2015-2016 to 2023-2024), children from high-affluence families consistently report the highest levels of participation, with figures ranging from 36.7% to 40.2%. Medium-affluence children follow closely behind, particularly in the later years, reaching 34.1% in 2022–23 and maintaining a similar level in 2023–24. Participation among children from low-affluence backgrounds is lower overall but shows a gradual increase, rising from 28.5% in 2017–18 to 31.9% in 2023–24.

3.7.6 By 2023–24, the difference between low and high-affluence groups is just over 2 percentage points, suggesting that walking is a more universally accessible activity compared to others such as horse riding. This convergence indicates that walking may serve as a more equitable form of physical activity, with fewer barriers related to socioeconomic status.

Horse Riding

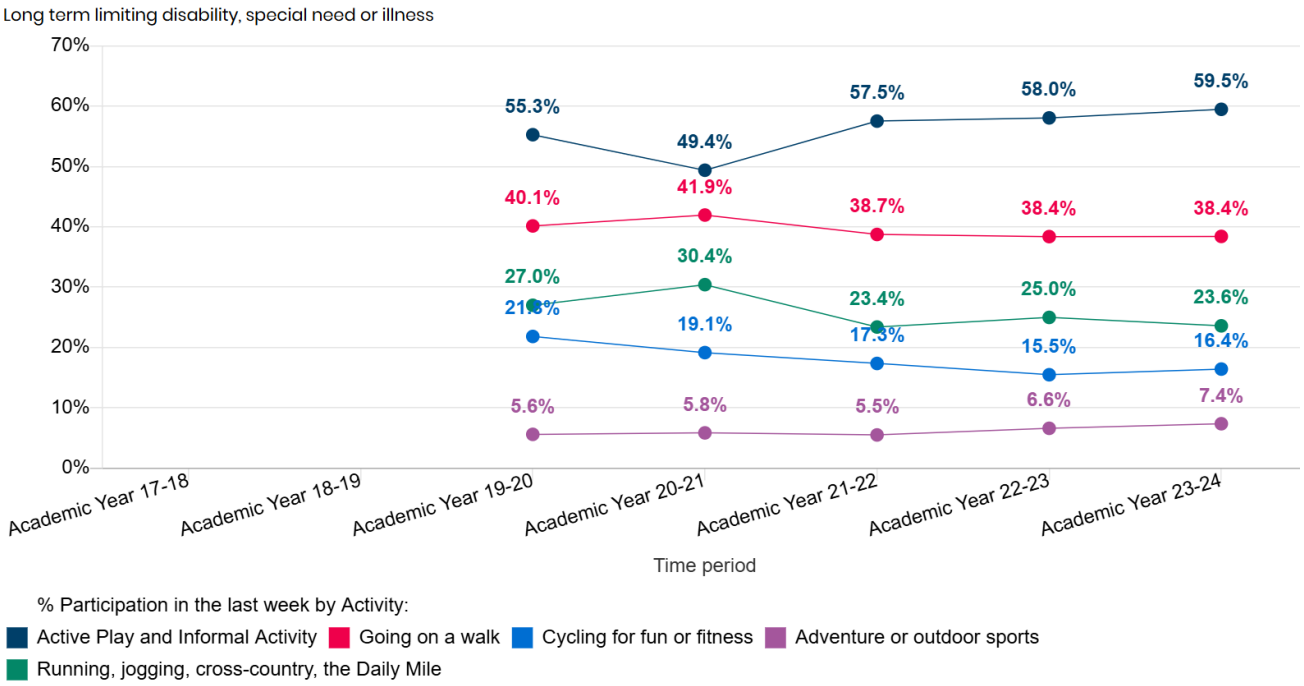
3.7.7 There is a clear correlation between family affluence and weekly participation in horse riding among children across the academic years 2017–18 to 2023–24. Children from high-affluence families consistently show the highest participation rates, peaking at 4.3% in both 2019–20 and 2022–23 before declining to 3.3% in the most recent year. In contrast, those from medium-affluence backgrounds exhibit relatively stable engagement, with a modest peak early on and minimal fluctuation thereafter. Participation among children from low-affluence families remains the lowest throughout the period, gradually declining from a peak of 2.2% in 2018–19 to just 1.5% by 2023–24.

3.7.8 Overall, the data underscores a persistent disparity in access to horse riding based on socioeconomic status, with a general trend of declining or stagnant participation across all groups in recent years.

3.8 Disability or Long-term Health Conditions

3.8.1 The Active Lives Data categorises this section as persons with a 'long-term limiting disability, special need or illness'.

Figure 1.40: Trends in Participation in higher participation sports in people with a disability or long-term health condition (Ages 5-16), (2017–2024) (Active Lives Data)



3.8.2 The above graph shows how participation in typically high engaged outdoor sporting activities has changed across the academic years 2019–20 to 2023–24 for children and young people aged 5 to 16 who have a disability, special educational need, or long-term health condition. No data was recorded prior to 2019–20.

3.8.3 A noticeable trend is the steady increase in participation in adventure or outdoor sports. Starting at 5.6% in 2019–20, the rate climbs gradually, with a slight dip in 2020–21, before rising to 7.4% by 2023–24. This suggests growing engagement in outdoor and adventure activities among young people with additional needs, particularly in the last two years. Despite this growth, this category of sports is considerably less participated in compared to the other activities as all figures for this time frame is below 10%.

3.8.4 Encouragingly, this 7.4% of 5–16-year-olds with a disability or long-term health condition taking part in adventure or outdoor sports weekly in 2023-24, compares to 6.2% of the general population. This reversal of the usual participation gap suggests real progress in making adventure and outdoor sports more accessible and appealing to disabled children.

3.8.5 The key takeaway here is that, at least in this area, children with a disability or long term health condition are not just catching up-they are leading the way. This is a positive sign for sport inclusion and suggests that the approaches being used in adventure and outdoor sports could offer valuable lessons for other types of activities, where disabled children's participation is still significantly lower than their peers without a disability.

3.8.6 Participation in active play and informal activity remains the most popular category throughout the period. Although it dipped to 49.4% during the 2020–21 academic year, likely due to pandemic-related restrictions, it rebounded strongly, reaching a peak of 59.5% by 2023–24. This recovery highlights the enduring appeal and accessibility of informal physical activity for this group.

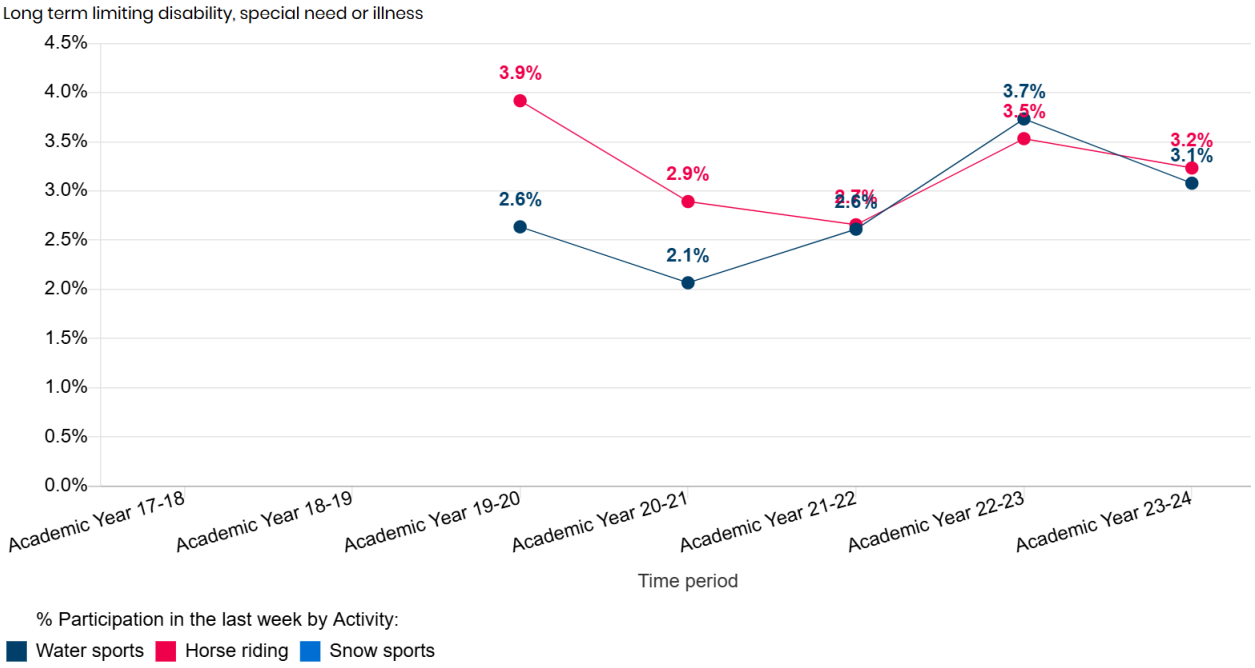
3.8.7 Going on a walk, while consistently popular, shows a slight downward trend. Participation declined from 40.1% in 2019–20 to around 38% in subsequent years, suggesting a modest reduction in engagement, though the activity remains widely practiced.

3.8.8 Cycling for fun or fitness experienced declines during this time period. Starting at 21.8% in 2019–20, it dropped to 17.3% in 2021–22 and dropped even more to 16.4% in 2023–24. This pattern may reflect varying access to equipment or safe spaces for cycling during and after the pandemic and suggests that the pandemic may have had persisting, negative impacts on cycling participation.

3.8.9 Running, jogging, cross-country, and The Daily Mile was consistently in the middle for participation figures, demonstrating these activities are relatively common but not the most popular for children. Engagement began at 27.0% in 2019–20 and, unlike most activities, increased during the pandemic to 30.4% in academic year 2020-2021.However, participation has been declining since then and is below pre pandemic levels with the most recent figure of 23.6%. This suggests that running-based activities may be increasingly less appealing to this demographic.

3.8.10 Overall, the data reflects a resilient and adaptive pattern of engagement in physical activity among children and young people with disabilities or long-term conditions. While some activities saw temporary declines, particularly during the pandemic, others, especially adventure sports and active and informal play, have gained momentum.

Figure 1.41: Trends in Participation in lower participation sports in people with a disability or long-term health condition (Ages 5-16), (2017–2024) (Active Lives Data)



3.8.11 This graph shows how participation in typically lower engaged outdoor sporting activities has changed across the academic years 2019–20 to 2023–24 for children and young people aged 5 to 16 who have a disability, special educational need, or long-term health condition. No data was recorded prior to 2019–20.

3.8.12 Horse riding consistently recorded the highest participation rates across the period, beginning at 3.9% in 2017–18. Although it dipped to 2.9% in 2018–19 and remained relatively stable in the following year, there was a resurgence to 3.5% in 2022–23 before a slight decline to 3.2% in 2023–24.

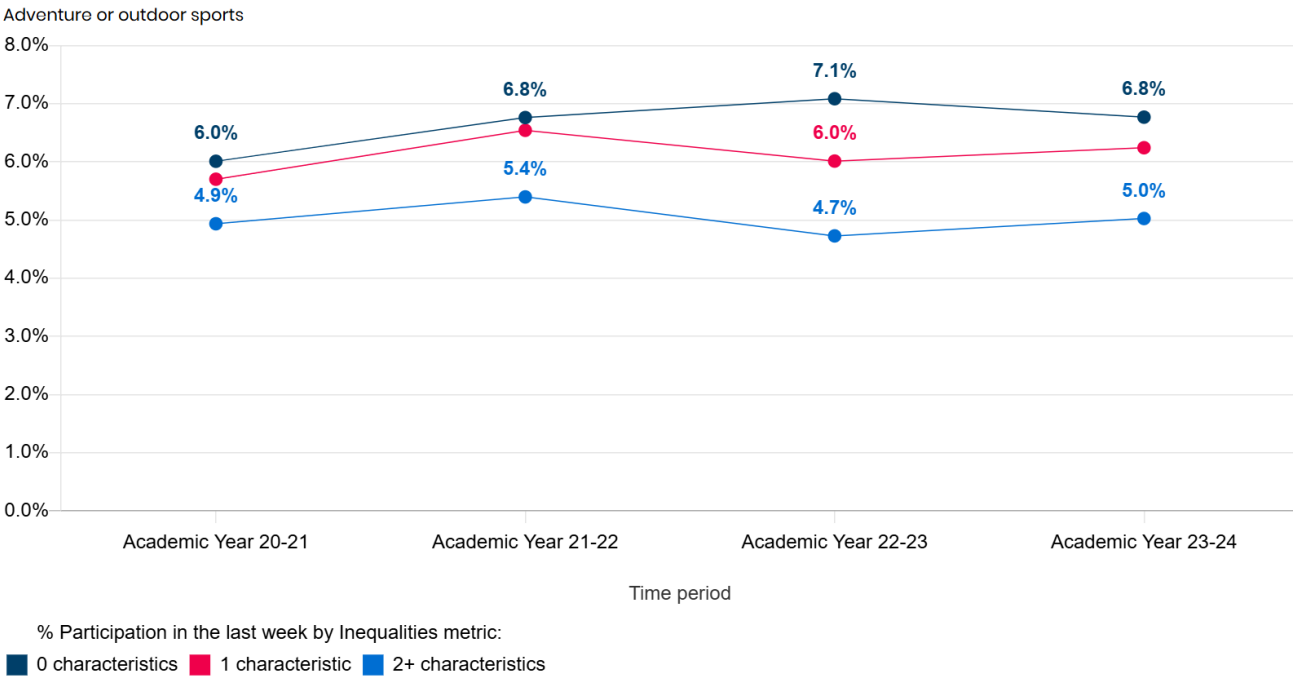
3.8.13 Water sports, while initially less popular at 2.6%, experienced a notable upward trend after reaching a low of 2.1% in 2020–21. By 2023–24, participation had climbed to 3.1%, nearly matching horse riding. No data is reported for snow sports, indicating either a low quality of data for this group or a lack of participation.

3.8.14 These findings suggest that horse riding has relatively low but somewhat consistent participation levels for young people with disabilities or long-term conditions, water sports are gaining traction and may represent an area of growing interest and opportunity. This increase in participation points to the potential benefits of expanding inclusive programming and access in these areas. Supporting a broader range of accessible outdoor and recreational options could help sustain and enhance physical activity levels among this demographic, contributing to improved health and wellbeing outcomes.

3.9 Inequalities Metric

3.9.1 For this section, the sporting activities that show the most visible and notable trends have been focused on in the trend analysis.

Figure 1.42: Trends in Participation in Adventure or outdoor sports by Inequalities metric (Academic years 3-11), (2020–2024) (Active Lives Data)

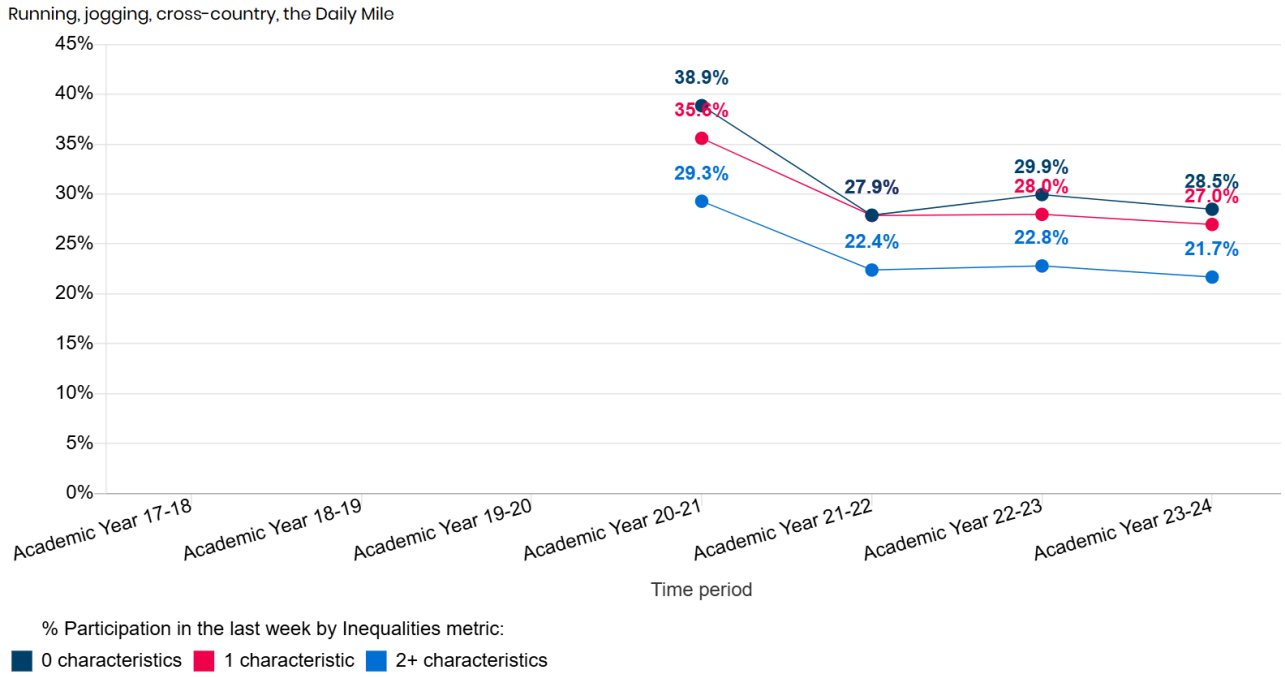


3.9.2 The above graph illustrates weekly participation trends in adventure or outdoor sports among children and young people in academic years 3 to 11, segmented by the number of characteristics of inequality they have. For children and young people, Sport England define a characteristic of inequality as: girls; other gender (secondary-aged children); low affluence; Asian and Black ethnicity; lack of access to a park, field, or outdoor sports space (secondary-aged children). This measure is important as it highlights the effects of intersectionality and how multiple forms of inequality intersect and influence one another, shaping people's experiences in complex ways.

3.9.3 Those with no characteristics of inequality consistently show the highest levels of participation, reaching a peak of 7.1% in 2022-23 before a slight decline to 6.8% in 2023-24. Participants with one inequality characteristic maintain moderate participation rates, generally around 6.0% throughout the period. In contrast, children with two or more protected demographic characteristics consistently record the lowest participation levels, fluctuating between 4.7% and 5.4%. Although there is a modest increase in participation for this group in 2021-22, the overall gap between them and their less disadvantaged peers remains evident.

3.9.4 These trends highlight a clear relationship between the number of characteristics of inequality a child has and their likelihood of engaging in adventure or outdoor sports on a weekly basis. Despite some overall growth in participation across all groups since 2020-21, the persistent disparity underscores the need for targeted interventions to address barriers faced by those with multiple disadvantage factors, ensuring more equitable access to these activities.

Figure 1.43: Trends in Participation in Running, jogging, cross-country, the Daily Mile by Inequalities metric (Academic years 3-11), (2020–2024) (Active Lives Data)

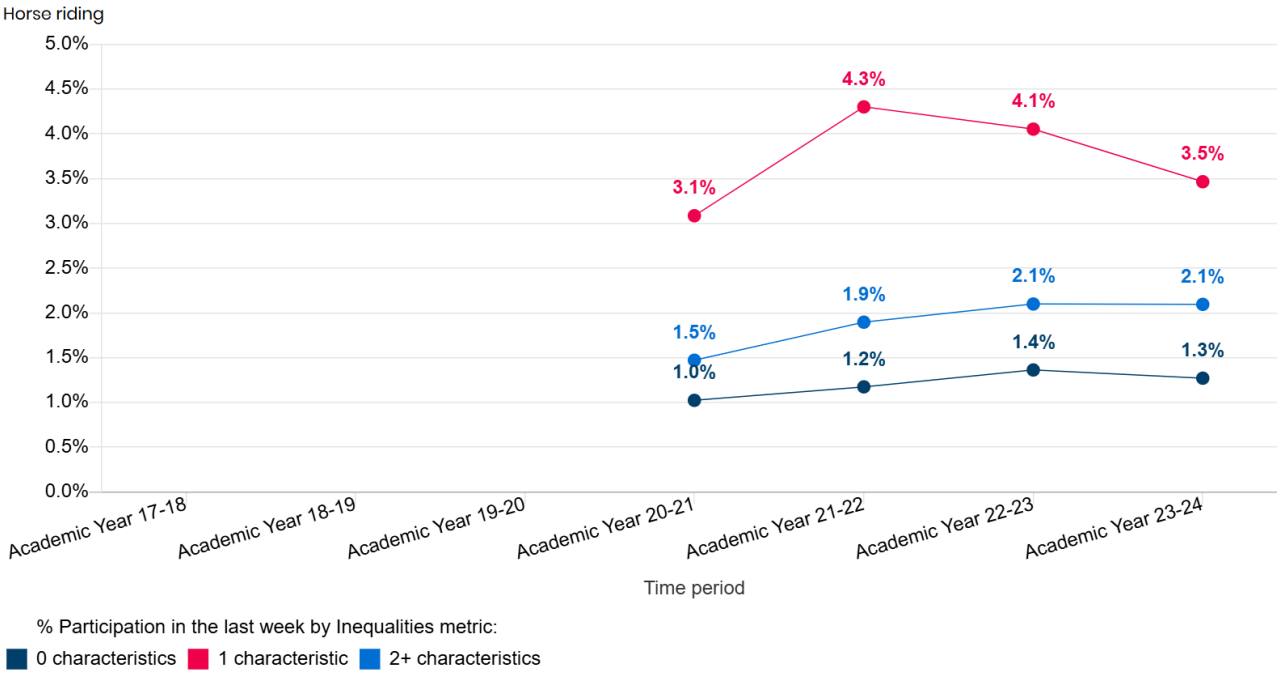


3.9.5 This graph illustrates weekly participation in running, jogging, cross-country, and The Daily Mile among children and young people in Years 3 to 11, segmented by their number of inequality characteristics. The data spans from the 2020-21 to 2023–24 academic years, with no data available for earlier years.

3.9.6 Children and young people with no characteristics of inequality consistently show the highest participation rates in the earlier years, starting at 38.9% in 2017–18 that declines to 27.9% by 2021–22. This reduction in engagement over time is likely influenced by factors such as the pandemic or reduced access to inclusive physical activity opportunities. In contrast, children and young people with two or more characteristics of inequality show a significant drop from 29.3% in 2020–21 to 22.4% in 2020-2021.

3.9.7 The findings highlight a concerning decline in participation in running-based activities, particularly among those with multiple characteristics of inequality. Ensuring inclusive, accessible, and appealing opportunities for all children and young people, especially those facing multiple barriers is needed to increase participation.

Figure 1.44: Trends in Participation in Horse Riding by Inequalities metric (Academic years 3-11), (2020–2024) (Active Lives Data)



3.9.8 This graph tracks weekly participation in horse riding among students in Years 3 to 11, segmented by the number of inequality characteristics they experience over the academic years 2020–21 to 2023–24. There is no data provided before the 2020-2021 academic year.

3.9.9 The data reveals a clear disparity in participation based on the number of inequality characteristics.

3.9.10 Students with one inequality characteristic consistently show the highest participation rates in horse riding, peaking at 4.3% in 2021–22 before declining slightly to 3.5% in 2023–24. This is likely because horse riding is typically more popular for girls than boys, and Sport England include girls as being a characteristic of inequality.

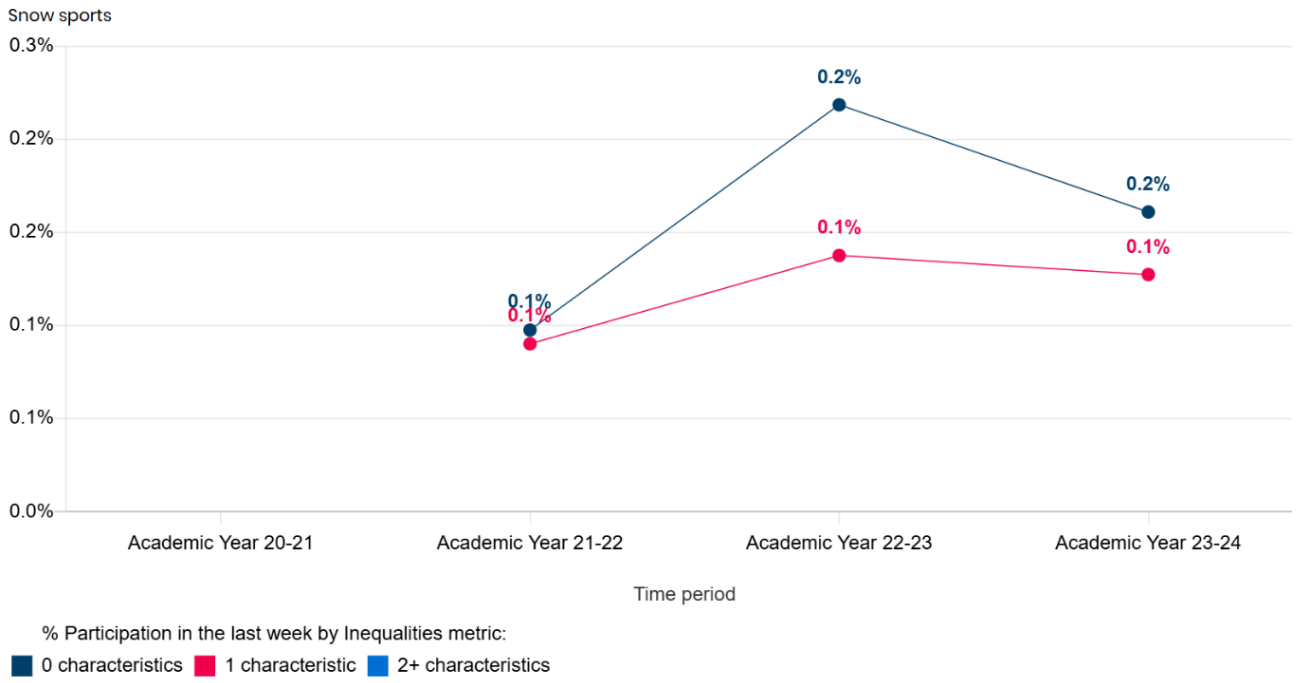
3.9.11 Those with two or more characteristics have much lower participation rates than those with one characteristic, however, is not the lowest. Their participation has increased from 1.5% in 2020–21 to 2.1% in the most recent years.

3.9.12 Those with no identified characteristics of inequality participate at the lowest rates, starting at 1.0% in 2020–21 and rising modestly to 1.4% in 2022–23 before dipping slightly again to 1.3%.

3.9.13 These findings indicate that horse riding is more effective in engaging those with characteristics of inequality than most activities. Despite this promising finding, participation across all groups is still much lower than many other outdoor sport and recreation opportunities. Therefore, further work is still required to increase levels of participation.

3.9.14 The gradual increase in participation among the most disadvantaged group is encouraging, but the persistent gap highlights the need for targeted interventions to ensure equitable access to equestrian activities. Expanding inclusive programs and addressing barriers such as cost, transport, and cultural relevance could help close this gap and support broader participation.

Figure 1.45: Participation in Snow sports by Inequalities metric (Academic years 3-11), (2020–2024) (Active Lives Data)

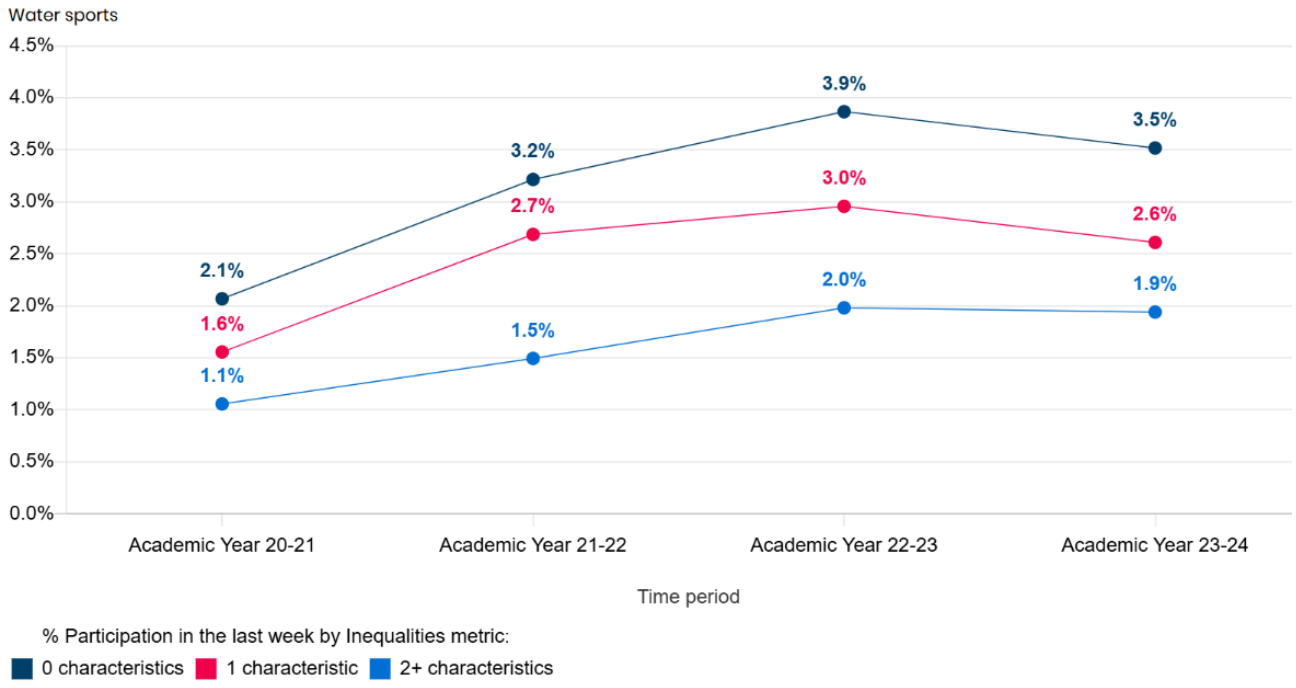


3.9.15 This graph shows a very low level of weekly participation in snow sports among children, regardless of how many characteristics of inequality they have. For all groups, participation remains at or below 0.2% throughout the period from academic years 2020-21 to 2023-24.

3.9.16 Children with no characteristics of inequality see a very marginal increase, rising from 0.1% in 2021-22 to 0.2% in both 2022-23 and 2023-24. Those with one characteristic of inequality maintain a steady level of 0.1% across all years. The standout finding is that there is no visible data for children with two or more characteristics, which likely reflects either extremely low or unrecorded participation in this group.

3.9.17 The consistently low rates across all groups highlight that snow sports remain a rare activity for children in these academic years, with minimal uptake regardless of background. Unlike adventure or water sports, there is little evidence of growth or closing gaps between groups. This suggests that barriers to participation in snow sports - such as cost, access, or limited opportunities - are affecting children across the board, and particularly those facing multiple disadvantages. The low participation levels in snow sports for children also reflects the findings found for over 16's and adults, showing that these activities have a low participation level across the UK population.

Figure 1.46: Participation in water sports by Inequalities metric (Academic years 3-11), (2020–2024) (Active Lives Data)



3.9.18 The above graph displays weekly participation rates in water sports among children in academic years 3 to 11, segmented by the number of characteristics of inequality they have. Across all four academic years, there is a clear and persistent gradient: children with no characteristics of inequality consistently report the highest participation rates, while those with two or more have the lowest.

3.9.19 Participation among those with no characteristics of inequality rises from 2.1% in 2020-21 to a peak of 3.9% in 2022-23, before a slight decline to 3.5% in 2023-24. Children with one characteristic also see an increase, from 1.6% in 2020-21 to 3.0% in 2022-23, though their participation drops to 2.6% in the most recent year. Meanwhile, those with two or more characteristics consistently have the lowest rates, starting at 1.1% in 2020-21 and reaching only 2.0% in 2022-23, followed by a slight decrease to 1.9% in 2023-24.

3.9.20 The data clearly demonstrates that the more inequality characteristics a child has, the less likely they are to participate in water sports on a weekly basis. While there has been some improvement in participation rates for all groups since 2020-21, the gap between the most and least advantaged remains significant. This ongoing disparity highlights the need to investigate further into the experiences of children in years 3-11 with inequality characteristics and the reasons why many are choosing not to engage in water sports.

3.10 Inequalities Metric Trends in Other Outdoor Sporting Activities

Going on a Walk

3.10.1 Across the academic years 2017–18 to 2023–24, participation has declined for all groups. A standout finding is that children and young people with one characteristic of inequality consistently reported the highest levels of engagement, though their participation dropped from 45.4% to 37.1% over the period. Those with two or more characteristics also saw a notable decrease, from 40.4% to 30.8%. This group consistently had the lowest participation rates, falling from 35.1% to 31.6% across the period. These findings suggest that while walking remains a relatively accessible activity, engagement is declining across the board, and those with one identified characteristic of inequality may be experiencing barriers but are participating more than their peers who don't have a characteristic of inequality.

Cycling for Fun or Fitness

3.10.2 Across the period (2020-2021 to 2023-2024 academic years), participation was highest among children and young people with no identified characteristic of inequality. In 2017-2018, this group had 28.4% participation, followed by those with one characteristic of inequality (22.2%) and two or more (16.5%). However, over time, participation among students with greater disadvantage declined more sharply. By 2020–21, students with two or more characteristics saw their participation drop to just 10.8%, while those with one characteristic fell to 14.1% by 2022–23, with only a marginal increase to 14.2% in 2023–24. Data for students with no characteristics is not available beyond 2017–18, limiting direct comparisons in later years.

3.10.3 The findings highlight a widening gap in access to or engagement with cycling among children and young people facing multiple barriers. The sharp decline among those with two or more inequality characteristics suggests that structural or environmental challenges may be limiting their ability to participate.

Active Play and Informal Activity

3.10.4 In 2017–18, participation was highest among children with no identified characteristics of inequality (60.5%), followed by those with one (55.5%) and two or more (47.8%). The most recent figures from 2022–23 and 2023–24 show a notable increase across all groups. By 2023–24, participation had risen to 68.5% for children with no characteristics, 61.7% for those with one, and 53.1% for those with two or more.

3.10.5 These findings suggest a positive trend in engagement with informal physical activity, particularly in the post-pandemic period. While disparities remain, children with multiple characteristics of inequality continue to participate at lower rates, the gap has narrowed slightly over time.

4 Trends in Types of Outdoor Sporting Activity

4.1.1 A full table of the types of outdoor sporting activities and their participation levels from 2015-2016 to 2022-2023 is presented in the Appendix. This is made up of 32 different sporting activities from the Active Lives data. See *Table 2.3* for participation levels as a percentage of the population, *Table 2.4* for the raw numbers of participants and *Table 2.5* for the trend (using 'r-value' calculations) in participation across 2015-2016 to 2022-2023.

4.1.2 To further assess trends in participation levels, the 'r value' has been calculated. The 'r value' is a number that tells us if participation in a sport has increased or decreased over time.

4.1.3 In our analysis, the 'r value' demonstrates which sports had the strongest growth or decline in participation between 2015-2016 and 2022-2023. This also gives us a comparison of participation levels pre and post COVID-19. See the tables below.

4.1.4 The Active Lives data shows participation rates from 2015-2016 to 2022-2023. This allows us to see and analyse comparisons between participation numbers pre-pandemic and post-pandemic where sports are in the recovery stages from the pandemic.

Table 2.1: Top 5 Sports with Largest Growth (by r value) in Participation from 2015-2016 to 2022-2023 (Active Lives Data)

Sport	Trend (r value)	% change	Number change	What does this mean?
Fell running	0.938	+60%	+404,800	Strong, consistent growth in participation
Skateboarding	0.936	+25%	+257,300	Strong, consistent increase in participation
Walking for leisure	0.890	+10.6%	+3,483,000	Strong, steady increase in participation
Hill or mountain walking/hiking	0.710	+617.2%	+10,123,200	Considerable growth over the years
Mountaineering and scrambling	0.667	-5.4%	-30,000	Steady growth in participation in recent years yet not recovered to pre-pandemic levels.

4.1.5 The latest Active Lives data from 2015-2016 to 2022-2023 highlights that fell running and skateboarding have seen the most consistent and strong growth in participation, with r values of 0.938 and 0.936 respectively. Fell running also has seen a 60% increase in participation, amounting to an additional 404,800 people taking part. This suggests these activities have become increasingly popular, likely because of the appeal of accessible, low-cost, and low-barrier activities.

4.1.6 Walking for leisure shows a strong positive trend with an r value of 0.89, a 10.6% increase, and 3.48 million more participants from 2015-2016 to 2022-2023. This steady growth highlights its popularity as an accessible and widely enjoyed outdoor activity, with the largest absolute increase in participants among the sports listed.

4.1.7 Hill or mountain walking and hiking also experienced considerable growth (r = 0.710), indicating that more people are seeking outdoor experiences, possibly driven by a desire for physical and mental wellbeing benefits and a greater appreciation for nature. Hill or mountain walking/hiking saw a staggering increase. This increase began in 2018-2019 where the participant numbers increased from 1,640,100 in 2017-2018 to 10,865,700 in 2018-2019. From 2015-2016 to 2022-2023, the activity surged by an extraordinary 617.2%. This equates to over 10 million more people participating, highlighting a massive boom in interest and engagement with this activity. Such a significant increase may reflect broader trends in outdoor recreation and a growing appreciation for accessible, nature-based activities.

4.1.8 As there is no data for 2015-2016 and 2016-2017 for Mountaineering and Scrambling the data from 2017-2018 to 2022-2023 was used to calculate the 'r' value, percentage change and change in the number of participants. The 'r value' reflects a strong upward trend after the dip in 2020-2021 indicating participation levels are increasing year by year, even though the overall change from the first to last year is a slight decrease as represented by the percentage and number decrease. This suggests that while there has been some recent growth, the sport has not yet fully recovered to its pre-pandemic levels.

Table 2.2: Top 5 Sports with Largest Decline in Participation from 2015-2016 to 2022-2023 (Active Lives)

Sport	Trend (r value)	% change	Number change	What does this mean?
Cycling for leisure	-0.930	-59.9%	-7,735,200	Strong, consistent decline in participation
BMX	-0.911	-30%	-68,700	Strong, consistent decline in participation
Angling	-0.876	-25.7%	-281,200	Strong, consistent decline in participation
Abseiling	-0.818	-39.3%	-107,500	Consistent decrease in participation
Equestrian	-0.780	-39.9%	-378,400	Consistent decrease in participation

4.1.9 The table highlights a clear and consistent decline in participation across five established outdoor and leisure sports between 2015-2016 and 2022-2023. Cycling for leisure experienced the most dramatic drop, with a 59.9% decrease in participation, equating to 7.7 million fewer participants. This decline is underscored by a very strong negative correlation (r = -0.93), indicating a steady downward trend over the period. Similarly, BMX, angling, abseiling, and equestrian activities all show strong negative trends, with r values ranging from -0.780 to -0.911. Each of these sports saw participation fall by between 25% and 40%, amounting to significant raw number losses: 68,700 fewer for BMX, 281,200 for angling, 107,500 for abseiling, and 378,400 for equestrian.

4.1.10 These findings suggest that, despite record overall physical activity levels in England and rising engagement in some outdoor pursuits, certain traditional or specialist activities are struggling to retain participants. The consistent nature of these declines' points to broader shifts in recreational preferences, possibly influenced by changing demographics, evolving interests, or greater competition from alternative forms of exercise and leisure. The implications are significant for sport providers and policymakers: reversing these trends may require targeted interventions, modernization of offerings, or new strategies to engage both lapsed and potential new participants in these sports.

5 Participation Trends Conclusions

5.1.1 The paper evidences, in substantial detail, the trends in outdoor recreation to the UK.

5.1.2 When looking at outdoor participation for adults aged 16 and over, some clear trends are evident.

5.1.3 Walking for leisure consistently holds the highest participation rate among adults and those over 16 in England. The data shows a steady increase from 73.8% in 2015-16 to a peak of 82.1% during the 2020-21 pandemic period, when walking was one of the few accessible forms of exercise. Although there has been a slight decline since that peak, participation remains robust at 77.8% in 2022-23. This trend underscores walking's status as an accessible, low-barrier activity with broad appeal, making it a cornerstone of outdoor physical activity for the population.

5.1.4 Unlike walking, cycling for leisure has seen a marked decrease in participation over recent years. Initially stable at around 29.1% in 2015-16, cycling participation dropped sharply during the pandemic, falling to just 11.6% in 2020-21 and declining further to 11.1% in 2022-23. This downward trend is consistent across all age groups and highlights a potential long-term disengagement with cycling.

5.1.5 Looking at outdoor participation for children and young people (ages 5-16), some clear trends in who is most likely to participate in outdoor sporting activity are evident.

5.1.6 Socio-economic status remains a significant determinant of outdoor activity participation. Individuals from higher income households and those with higher educational attainment are consistently more likely to take part in outdoor activities, such as walking, cycling, and adventure sports. In contrast, participation rates among those from lower income brackets and less advantaged backgrounds are substantially lower. This persistent gap underscores the importance of addressing barriers such as access, affordability, and awareness to ensure equitable opportunities for all segments of the population.

5.1.7 Promisingly, the gender gap in outdoor activity participation has narrowed over recent years, particularly in walking and some adventure sports. Women's participation rates have increased steadily, approaching those of men in several activities. However, disparities remain, especially in cycling and certain water sports, where men still participate at higher rates. This trend indicates progress in reducing gender-based barriers but also points to the need for continued efforts to foster inclusive environments and targeted initiatives to further close the gap.

5.1.8 Furthermore, there has been a dynamic shift in outdoor activity preferences, with notable growth in accessible and wellness-focused pursuits. Activities such as stand-up paddleboarding, outdoor yoga and fitness classes, trail running, wild swimming, and climbing have seen the most significant increases in participation. These activities appeal to a broad demographic, driven by trends in holistic health, social engagement, and a desire for adventure in natural settings.

5.1.9 More traditional or resource-intensive activities have experienced marked declines. Road cycling, angling, horse riding, orienteering, and golf have all seen reduced participation, often due to barriers such as cost, access, safety concerns, and shifting leisure interests, particularly among younger generations. These trends underscore the importance of adapting outdoor activity offerings to evolving public preferences, ensuring that opportunities remain inclusive, affordable, and relevant to changing lifestyles.

6 Appendix

Table 2.3: Weekly Participation by percentage of population in Outdoor sporting activities (2015-2023) (Active Lives Data)

Activity	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
Abseiling	0.6%	0.6%	0.5%	0.6%	0.4%	0.2%	0.3%	0.4%
Angling	2.5%	2.6%	2.2%	2.3%	2.1%	1.6%	1.7%	1.7%
BMX	0.5%	0.5%	0.4%	0.4%	0.4%	0.3%	0.3%	0.3%
Canoeing, Kayaking, Rafting	-	-	-	-	-	-	-	4.7%
Caving or pot holing	0.3%	0.3%	0.3%	0.3%	0.2%	0.1%	0.2%	0.3%
Cycling for leisure	29.1%	29.3%	28.2%	27.5%	21.2%	11.6%	11.0%	11.1%
Cyclo-cross	0.4%	0.4%	0.4%	0.4%	0.4%	0.3%	0.3%	0.3%
Equestrian	2.1%	2.2%	2.1%	2.5%	1.6%	1.0%	1.0%	1.1%
Fell running	1.0%	1.2%	1.4%	1.5%	1.8%	1.6%	1.7%	1.8%
Gliding, paragliding or hang gliding	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
High ropes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hill or mountain walking or hiking	-	-	3.6%	24.0%	23.4%	22.3%	24.0%	25.3%
Informal Activity and Active Play	-	-	-	-	-	13.0%	15.1%	16.8%
Mountain biking	5.3%	5.2%	4.9%	4.9%	5.2%	5.0%	4.8%	4.7%
Mountaineering and scrambling	-	-	1.2%	1.2%	1.1%	0.7%	0.9%	1.1%
Obstacle course (e.g. Tough Mudder)	0.5%	0.9%	0.9%	1.0%	0.7%	0.2%	0.4%	0.5%
Orienteering	0.8%	0.8%	0.8%	0.8%	0.7%	0.4%	0.5%	0.7%
Other horse riding	0.5%	0.5%	0.4%	0.4%	0.4%	0.3%	0.4%	0.4%
Paddleboarding	-	-	-	-	-	-	-	4.6%
Parkour or free running	0.5%	0.6%	0.6%	0.6%	0.6%	0.4%	0.5%	0.6%
Rock climbing or bouldering	1.3%	1.4%	1.4%	1.5%	1.3%	0.8%	1.0%	1.4%
Rowing (on water)	1.5%	2.1%	1.7%	2.3%	1.2%	0.8%	1.1%	1.1%
Running, athletics or multi-sports	28.5%	30.2%	29.8%	29.7%	29.9%	24.5%	24.1%	25.2%
Sailing	2.0%	2.1%	2.0%	2.1%	1.7%	1.1%	1.4%	1.5%
Scuba diving or snorkelling	1.6%	1.8%	2.2%	2.2%	1.7%	0.4%	0.8%	1.4%
Skateboarding	0.4%	0.5%	0.5%	0.5%	0.5%	0.8%	0.9%	0.9%
Snowsport	3.9%	4.3%	4.3%	4.2%	3.8%	1.4%	2.4%	3.5%
Surfing, board surfing, body boarding, kite surfing	1.5%	1.8%	2.2%	2.3%	2.4%	2.2%	3.2%	1.9%
Swimming - Open water	-	-	9.2%	9.1%	8.3%	5.9%	7.8%	9.4%
Triathlon	0.5%	0.5%	0.5%	0.5%	0.5%	0.3%	0.3%	0.5%
Walking for leisure	73.8%	73.6%	75.2%	76.7%	79.7%	82.1%	78.9%	77.8%
Waterskiing	0.4%	0.4%	0.4%	0.4%	0.4%	0.2%	0.3%	0.4%

Table 2.4: Weekly Participation by raw numbers in Outdoor sporting activities, (2015-2023) (Active Lives Data)

Activity	15-16	16-17	17-18	18-19	19-20	20-21	21-22	22-23
Abseiling	273,800	257,600	244,800	254,000	190,500	82,900	129,000	166,300
Angling	1,092,600	1,144,500	979,400	1,051,100	966,500	730,000	779,200	811,400
BMX	228,600	242,800	189,900	196,100	180,700	155,500	141,100	159,900
Canoeing, Kayaking, Rafting	-	-	-	-	-	-	-	2,169,900
Caving or pot holing	137,900	120,400	137,400	156,000	95,100	55,700	81,500	125,600
Cycling for leisure	12,918,900	13,102,200	12,701,500	12,451,800	9,646,100	5,318,000	5,085,900	5,183,700
Cyclo-cross	158,600	163,900	179,800	187,700	175,700	145,100	133,200	141,200
Equestrian	949,200	977,700	936,900	1,122,000	712,400	435,800	524,400	570,800
Fell running	450,500	535,300	643,800	673,600	802,300	714,400	789,500	855,300
Gliding, paragliding or hang gliding	71,300	74,800	55,700	58,100	54,400	26,900	61,000	62,900
High ropes	17,500	12,900	18,200	17,300	20,400	9,300	12,500	11,800
Hill or mountain walking or hiking	-	-	1,640,100	10,865,700	10,638,900	10,182,600	11,049,300	11,763,300
Informal Activity and Active Play	-	-	-	-	-	5,940,300	6,967,400	7,801,700
Mountain biking	2,352,900	2,304,700	2,222,700	2,208,000	2,372,500	2,271,100	2,228,500	2,209,300
Mountaineering and scrambling	-	-	551,300	548,800	484,700	306,500	411,400	521,300
Obstacle course (e.g. Tough Mudder)	239,400	400,700	423,000	440,800	313,100	108,200	199,000	237,500
Orienteering	360,500	350,200	358,300	340,200	311,900	174,200	246,500	306,900
Other horse riding	215,200	233,900	201,800	201,200	200,800	128,400	193,800	198,800
Paddleboarding	-	-	-	-	-	-	-	2,146,100
Parkour or free running	243,200	271,000	277,900	287,900	278,300	184,700	217,100	296,100
Rock climbing or bouldering	574,300	648,600	633,700	666,300	582,500	379,100	460,400	647,800
Rowing (on water)	661,500	957,000	752,400	1,051,700	560,500	367,800	485,400	512,300
Running, athletics or multi-sports	12,641,800	13,531,900	13,411,800	13,418,200	13,606,900	11,201,200	11,112,300	11,728,300
Sailing	894,900	950,600	892,800	939,800	766,400	480,200	640,700	712,300
Scuba diving or snorkelling	715,300	815,900	983,000	984,600	763,700	198,700	368,100	651,900
Skateboarding	171,000	205,100	224,400	220,800	247,600	381,600	436,000	428,300
Snowsport	1,747,300	1,910,900	1,919,400	1,885,200	1,734,600	623,100	1,116,400	1,635,300
Surfing, board surfing, body boarding, kite surfing	652,600	798,200	1,003,100	1,020,300	1,112,700	1,010,100	1,468,000	896,900
Swimming - Open water	-	-	4,123,700	4,120,800	3,766,500	2,677,000	3,587,000	4,374,400
Triathlon	201,700	214,600	245,000	224,500	206,600	121,100	160,100	213,000
Walking for leisure	32,738,800	32,935,500	33,817,100	34,682,600	36,252,200	37,520,600	36,329,500	36,221,800
Waterskiing	169,900	159,400	190,200	201,400	164,200	93,000	147,700	177,100

Table 2.5: Trend in Weekly Participation (by r value) in Outdoor sporting activities, (2015-2023) (Active Lives Data)

Sport	*r Value*	*Years used for data*
Abseiling	-0.818	2015-16 to 2022-23
Angling	-0.876	2015-16 to 2022-23
BMX	-0.917	2015-16 to 2022-23
Canoeing, Kayaking, Rafting	N/A	Only 2022-23 data
Caving or pot holing	-0.721	2015-16 to 2022-23
Cycling for leisure	-0.93	2015-16 to 2022-23
Cyclo-cross	-0.58	2015-16 to 2022-23
Equestrian	-0.78	2015-16 to 2022-23
Fell running	0.938	2015-16 to 2022-23
Gliding, paragliding or hang gliding	-0.617	2015-16 to 2022-23
High ropes	-0.562	2015-16 to 2022-23
Hill or mountain walking/hiking	0.710	2015-16 to 2022-23
Informal Activity and Active Play		
Mountain biking	-0.297	2015-16 to 2022-23
Mountaineering and scrambling	0.667	2017-18 to 2022-23
Obstacle course (e.g. Tough Mudder)	-0.598	2015-16 to 2022-23
Orienteering	-0.659	2015-16 to 2022-23
Other horse riding	-0.137	2015-16 to 2022-23
Paddleboarding	N/A	Only 2021-22, 2022-23 data
Parkour or free running	-0.238	2015-16 to 2022-23
Rock climbing or bouldering	-0.062	2015-16 to 2022-23
Rowing (on water)	-0.601	2015-16 to 2022-23
Running, athletics or multi-sports	N/A	Only 2021-22, 2022-23 data
Sailing	-0.742	2015-16 to 2022-23
Scuba diving or snorkelling	-0.502	2015-16 to 2022-23
Skateboarding	0.936	2015-16 to 2022-23
Snowsport	-0.173	2015-16 to 2022-23
Surfing, board surfing, body boarding	0.628	2015-16 to 2022-23
Swimming - Open water	0.292	2017-18 to 2022-23
Triathlon	-0.095	2015-16 to 2022-23
Walking for leisure	0.89	2015-16 to 2022-23
Waterskiing	-0.495	2015-16 to 2022-23

APPENDIX 2:

ECONOMIC VALUE OF OUTDOOR RECREATION

1 Stepping Out: Visits to the Natural Environment

1.1.1 The starting point for the economic research is to consider the number of people who actively participate in outdoor recreation across the country and the scale of these activities. It will also analyse the motivations for people to visit the outdoors and countryside.

1.1.2 Building this UK-wide picture is challenging as each nation defines outdoor recreation differently and records participation according to differing requirements and priorities. Participation data varies by country and there is no UK wide data available. The issue is complicated further by the fact that more than one survey is used to record participation in outdoor recreation in each of these nations. There are also varying margins of error within each survey and that the actual number of people participating in activities will vary from the estimates presented. Many of the overall statistics in these datasets are based on a grossing-up approach. This means that a representative sample is scaled up in line with population sizes.

1.1.3 The most significant headlines to emerge were:

- There were 4.12b estimated visits by English adults to the great outdoors
- Visits to the outdoors peaked in 2020/2021 and then fell for two consecutive years to 3.8% below 2019 levels in 2022/2023
- Although 2023/2024 has again seen outdoor visits increasing, this remains 9.4% below peak levels in 2020/2021
- This has increased by 32% from 2014/15 (3.12b)
- Walking is the main participatory activity with 70% of visitors reporting this activity
- In England, 3.6 million (7.7%) of adults participated in hill and mountain walking
- 68% of visitors to National Parks are families, most going in a group with under five people.
- Only 7% of visitors to National Parks come from outside the UK
- Walking (40%) is the most popular activity visitors do in National Parks

1.1.4 Natural England's *The People and Nature Surveys for England* (2024) found that between April 2023 and March 2024:

- There were 4.12b estimated visits by English adults to the great outdoors
- 67% of adults had visited a green and natural space at least once in the last 14 days
- 16% of adults visited daily, 54% weekly, 13% monthly
- 16% of children visited daily, 32% more than twice a week, 18% twice a week, 17% once a week, 10% once or twice a month
- 51% of adults visited urban green spaces (such as a park, field, or playground) in the last month. Fields / farmland /countryside and woodland or forest were the second most frequently visited green or natural spaces (both visited by 32% of people). Rivers, lakes, or canals were visited by 31% of people. The fifth most frequently visited green and natural space was the beach / other coastline / sea (visited by 29% of people). 21% adults visited nature/wildlife reserve, 20% grounds of a historic property or county park, 13% hill, mountain or moorland, and 8% for an allotment or community garden
- Getting fresh air (57%) and physical health and exercise (49%) were the main reasons for people taking a visit to a green and natural space, followed by mental health and wellbeing (40%). A total of 27% adults visited a green and natural space to walk a dog, 20% to connect to nature/watch wildlife
- 50% of people taking a visit to a green and natural space for physical health and exercise visited an urban green space, 53% fields/farmland/countryside, 54% woodland or forest, 52% river, lake or canal, 46% beach/other coastline/sea
- 92% agreed that spending time outdoors was good for their physical health and 89% agreed that it was good for their mental health

Specific Activities Made by Adults That Took a Visit in the Last 14 Days

- Walking (including taking a dog for a walk) 70%
- Playing with children 13%
- Running 10%
- Sports and games 7%
- Cycling 6%
- Fishing 4%
- Boating, water sports, or swimming outdoors 4%
- Horse-riding 3%
- Shooting / hunting 3%

1.2 Outdoor Visit Trends

1.2.1 Here we have relied upon the Monitoring of Engagement with the Natural Environment (MENE) survey carried out by Natural England. The final year of the report was 2019, whereby it was replaced with the People and Nature Survey. There are methodological differences between the reports, however, pairing the data across these discrepancies suggest that visits to the outdoors for health and exercise from April 2020-March 2021 (during the COVID-19 pandemic) peaked with 4.5 billion visits to outdoor spaces. This may have had an impact on the outdoor retail sector as many organisations did not foresee that outdoor visits would then decline for two consecutive years to below 2019 levels (11% in 2021, 4.5% in 2022). Although 2024 has seen outdoor visits again increasing year on year and over 2019 levels, this is still 9.4% below the levels seen in 2020/2021.

Last MENE report (March-February 2019): 3,988,000, 000

Year 1 (April 2020 – March 2021): 4,505,400,000 13% increase
Year 2 (April 2021 – March 2022): 4,016,438,000 0.7% increase (2019) 11% decrease (2021)
Year 3 (April 2022 – March 2023): 3,841,948,000 3.8% *decrease (2019) 4.5% decrease (2022)*
Year 4 (April 2023 – March 2024): 4,119,820,000 3.3% increase (2019) 7.2% increase (2023)

1.2.2 In 2022/2023, 92% of respondents agreed that spending time outdoors was good for their physical health while 91% agreed that spending time outdoors was good for their mental health. This has remained constant for the following period (2023/2024) for physical health, while those agreeing that spending time outdoors was good for their mental health declined slightly by 2% (89%).

1.2.3 **The Sport Scotland, Sport for Life 2024- Annual Review** reported that 1.08 million people took part in the programmes that Sport Scotland invested in, during 2023/2024. This has increased from 0.98 million in the previous year 2022/2023.

1.2.4 **Key findings from the Scottish Household Survey 2022** (SHS) are that 82% adults had taken part in physical activity and sport in the previous four weeks. This had increased slightly from 80% in 2019. Recreational walking (for at least 30 minutes) was the most common type of physical activity; 74% of adults reported taking part in recreational walking in the past 4 weeks. This has increased from 68% in 2019. Excluding walking, 51% of adults participated in sport and physical activity in the previous 4 weeks, which is a decrease from 54% in 2019. 17% used a method of active travel to get to work or further/higher education, which was similar to 2019. This included 14% who walked and 3% who cycled. Of school children travelling to school, 50% walked and 1% cycled; this is consistent with results from 2019 (52% and 2% respectively).

1.2.5 **The Northern Ireland Continuous Household Survey (2020-21)** highlighted a 3% rise in overall sports participation numbers (to 59%) over the previous year.

2 Economic Value

2.1.1 The outdoor recreation sector delivers substantial economic benefits at national, regional, and local economy levels. Destinations with robust outdoor activity options attract tourists who specifically seek these experiences. Consumer spending extends beyond activity and instruction fees to equipment purchases and local hospitality businesses. The significant levels of participation in outdoor recreation across the UK include many participants that undertake these activities away from home. These participants, alongside overseas tourists, are part of the 'visitor economy'.

- Additionally, the sector creates diverse employment opportunities further strengthening the importance of the sector to the economy.
- In rural areas and communities with economies that are dependent on tourism as a source of income and jobs, outdoor recreation can be identified as a significant driver of local economies and growth.

2.1.2 Here we will look at this contribution across the following areas:

- Spending money outdoors and the visitor economy
- Specific activity data
- The outdoor specialist market
- Creating jobs and skills

2.2 Spending Time and Money Outdoors and The Visitor Economy

2.2.1 The visitor economy in the UK is estimated by various sources. As a result of differing methodologies and time frames of information collection, there is variation in the figures assigned to the value of the visitor economy. A key highlight across the research is that tourism makes a significant financial contribution to the UK economy. In this section we will highlight the contribution of the Outdoor Recreation sector to the visitor economy.

2.2.2 Overall, between 2022 and 2023 financial years, we do see a decrease in overnight trips that involve outdoor activities, nights, and expenditures. This could be due, however, to visitors choosing to travel further abroad in the immediate aftermath of the COVID-19 lockdowns and travel restrictions. However, due to a limited data set (due to methodological changes in between periods) it is difficult to analyse the broader trend before 2022.

2.2.3 There are some caveats to this picture, for example, while 'nights' for all visits declined between periods, this rate of decline was less pronounced for nights with trips involving outdoor activities. Across GB as a whole, **while nights declined there was an 8% *increase* for nights with trips involving outdoor activities.**

Outdoor Staycations: overnight domestic tourism in Great Britain involving outdoor recreation in 2023

2.2.4 According to the Great Britain Tourism Survey (GBTS) *GB Tourist Annual Report* (2023):

- In 2023, in Great Britian:
  - 117.4 million overnight trips were made in Great Britain, and 29.3 million trips (25% of the total) involved taking part in outdoor leisure activities
  - There were 340.2 million total bed nights spent during the overnight trips
  - 104.4 million bed nights (31% of the total) were related to trips involving outdoor recreation
  - £31.3b was spent on overnight trips in Great Britain
  - £8.4b (27% of the overall trip spend) was spent on trips involving outdoor recreation
- Alternatively, across England:
  - 99.4 million overnight trips were made
  - 23.7 million trips (24% of the total) involved taking part in outdoor leisure activities
  - Total bed nights generated £280.3 million spend during the overnight trips
  - 81.7 million bed nights (29% of the total) were related to trips involving outdoor recreation
  - £26.1b was spent on overnight trips
  - £6.7b (26% of the overall trip spend) was spent on trips involving outdoor recreation.

Table 3.1: Overnight Trips in GB (2022-2023)

Year	Overnight Trips in GB (millions)	Overnight Trips Involving Outdoor Leisure Activities	% Total Trips	Nights (millions)	% Total Nights	Spend (£millions)	% Total Spend
2022	123.5	33.3	27%	122.3	23%	£9,117	29%
2023	117.4 -5.2%	29.3 -12%	25% -2%	104.4 -17%	31% +8%	£8,383 -8.8%	27% -2%

Table 3.2: Overnight Trips in England (2022-2023)

Year	Overnight Trips in England (millions)	Overnight Trips Involving Outdoor Leisure activities	% Total Trips	Nights (millions)	% Total Nights	Spend (£millions)	% Total Spend
2022	104.5	27.3	26%	98.0	32%	£7,465	28%
2023	99.4 -5.1%	23.7 -15.2%	24% -2%	81.7 -20%	29% -3%	£6,727 -11%	26% -2%

No data available before 2022 due to methodological change

2.3 Day visits – All GB & England

2.3.1 Looking at Visit Britian surveys and compared to reported 2015 figures in Reconomics 1.0, there has been an overall decline in the number of day visits, however, the total spend by visitors has remained constant. **This could be related to the cost-of-living crisis. For example, in 2024 total spend for day visits across Great Britian and England increased by 20% and 19.3% (respectively) compared to 2023, a marked year on year increase.**

2.3.2 According to Visit Britain's *Great Britain Day Visits Survey* (2024):

- In 2024, 1.0 billion day visits were made in Great Britain, generating £54.8 billion in overall spend (average £53 per visit), and 64.4 million day visits (6.4% of total) had outdoor leisure activities and sports as the main activity undertaken, spending £2.57 billion (4.7% of total day visitor spend)
- 906 million day visits were made in England, generating £48.44 billion in overall spend (average £53 per visit), and 56.3 million day visits (6.2% of total) had outdoor leisure activities and sports as the main activity undertaken, spending £2.14 billion (4.4% of total day visitor spend).

Table 3.3: Domestic Day Visits Taking Part in Outdoor Leisure Activities and Sports by Region of Place of Residence

Domestic Day Visits Taking Part in Outdoor Leisure Activities and Sports by Region of Place of Residence		
Region of Place of Residence	**Visits (million)**	**Spend (£m)**
East Midlands	7.61	269.02
East of England	6.97	196.82
East of Scotland	0.23	12.20
London	9.10	568.36
Mid Wales	0.00	0.00
North East	1.08	16.95
North of Scotland	0.76	48.27
North Wales	0.06	0.98
North West	3.60	169.92
South East	6.28	196.27
South East Wales	6.71	214.38

Domestic Day Visits Taking Part in Outdoor Leisure Activities and Sports by Region of Place of Residence		
Region of Place of Residence	**Visits (million)**	**Spend (£m)**
South West	0.56	57.76
South West Wales	2.49	124.11
West Midlands	3.11	78.33
West of Scotland	2.40	55.10
Yorkshire and The Humber	2.93	89.90

Table 3.4: Day Visits in GB (2022 – 2024)

Year	Day Visits in GB (millions)	Day Visits Involving Outdoor Leisure Activities	% Total Trips	Spend (£millions)	% Total Spend
2022	1,095	71.7	6.5%	£2,104	4.6%
2023	1,171 +6.9%	71.1 -0.9%	6.1% -0.4%	£2,142 +1.8%	4.1% -0.5%
2024	1,028 -14%	64.4 -9.5%	6.3% -0.2%	£2,572 +20%	4.7% +0.6%

Table 3.5: Day Visits in England (2022 – 2024)

Year	Day Visits in England (millions)	Day Visits Involving Outdoor Leisure Activities	% Total Trips	Spend (£millions)	% Total Spend
2022	951	63	6.6%	£1,860	4.7%
2023	1,030 +8.3%	59.7 -5.3%	5.8% -0.8%	£1,795 -3.6%	3.9% -0.8%
2024	906.3 -12%	56.3 -5.7%	6.2% +0.4%	£2,142 +19.3%	4.4% +0.5%

2.4 Visits to National Parks

2.4.1 Written evidence submitted by National Parks England (PEG0235) in September 2020 shows that, in a typical year, National Parks welcome over 98 million visitors who spend more than £5.5bn in the parks and immediate areas surrounding them.

2.4.2 According to the National Park Authority annual reports and statement of accounts (Statista, 2022), the gross expenditure of National Park Authorities in Great Britain (excluding Snowdonia) was £118.89 million between April 2020 and March 2021 and £144.27 million between April 2021 and March 2022, whereas the governmental grants allocated to National Park Authorities in Great Britain (excluding Snowdonia) were £70.26 million between April 2020 and March 2021 and £75.26 million between April 2021 and March 2022.

2.5 Scotland

- Specific activities undertaken by domestic visitors in Scotland, 2023
  - Hill walk, mountaineering, hike (36%)
  - Road cycling or touring (5%)
  - Water sports, wind sports – non motorised (4%)
  - Off road cycling (4%)
  - Golf (3%)
  - Paddle sports (3%)
  - Wellness activity (3%)
  - 27% indicated outdoor activities available as one of the reasons why they chose Scotland (3rd most important reason)

2.6 Wales

2.6.1 ***The Economic and Social Evaluation of the Outdoor Activity Sector in Wales Report (2023)*** highlighted the total number of trips, nights, and spend associated with domestic visits to Wales:

- In 2021, there were 9.97 million trips (8% of all trips in the UK)
- Generated 36.52 million nights (9% of all night generated in the UK)
- A total Spend of £1.98m (7% of total spend in the UK)

2.6.2 In Wales, 74% of trips included visits to the countryside, villages, small towns, and seaside/coastal towns (only 59% of trips in wider GB were to these types of locations) This demonstrates the value of tourism to rural Wales, where the economy can otherwise be fragile.

- The total income from trips associated with outdoor activities in Wales was £1.6bn in 2021
- Generates a total net impact of £1.619bn annually
- Supports 31,278 jobs (21% of all tourism jobs in Wales)
- A net economic impact of outdoor activity tourism businesses of £272.87m annually, of which £205m is retained in Wales
- The retention of 38% of income in local community represents a significant contribution to the foundational economy in many rural and coastal areas of Wales
- Estimates for the preventative health value for an estimated 20% of vulnerable participants, calculates the mental health value of the sector to be £26.54m to Wales and £47.5m to the UK
- A 10% increase in participation could bring about an increase in social value of £187m across physical and mental health, mental wellbeing, individual development, and social capital
- Additional investment in infrastructure to provide access for more vulnerable individuals would pay back through the health service under the prevention agenda
- The average spend of undertaking the outdoor activity itself was £29.00 per person
- There was a further average wider spend of £31.62 in the local area
- This implies an average trip accommodation spend across all durations and accommodation types of £146.36 per person

2.7 Northern Ireland

2.7.1 According to Sport Northern Ireland's Assessing the Economic Impact of Outdoor Recreation in Northern Ireland (2019):

- The sector generates a total Gross Value Added (GVA) of £131.3 million, supporting 4,804 full-time equivalent (FTE) jobs—a figure that rises to over 5,600 when unpaid voluntary contributions are considered
- Consumer spending on outdoor recreation by Northern Ireland residents amounts to just over £192 million, with major contributions coming from:
  - bicycles (£37 million)
  - boats (£31 million)
  - clothing (£25 million)
  - outdoor centres/parks/charities (£21 million)
  - other major durables (£21 million).
- This spending represents 26% of the overall sport-related market (excluding gambling)
- The commercial outdoor recreation sector, which includes retail and accommodation dedicated to outdoor activities, has a total income of £161.2 million, a surplus of £16.4 million, and employs 1,157 FTE staff, contributing £37.4 million in GVA
- Additionally, the commercial non-outdoor recreation sector, which provides essential supporting services, reports £51.3 million in total income, a £20.8 million surplus, and employs 1,327 FTE staff, generating £51.3 million in GVA
- The voluntary sector contributes £27.4 million in GVA, even without factoring in the economic value of unpaid volunteer work
- The public sector contributions come from both central and local government

    - Central government sector generates £76.2 million in income and spending £18.6 million, employing 220 FTE staff
    - Local government sector, despite a lower income of £6.7 million, spends £28.2 million and employs 450 FTE staff
- The overall public sector's GVA amounts to £15.2 million
- Since 2011, the outdoor recreation sector in Northern Ireland has seen significant growth, with GVA increasing by 24% (adjusted to 2017 prices) and employment rising by 36%.

2.8 Economic Value by Activity

UK Holiday Parks and Campsites Sector

2.8.1 According to the *Pitching the Value* report by the UK Caravan and Camping Alliance (UKCCA, 2024), the UK's caravan and camping sector significantly contributes to the national economy and tourism industry:

- The sector generates £12.2 billion in visitor expenditure, contributing £7.2 billion Gross Value Added (GVA) to the UK economy
- Touring visitors and holiday caravan owners spend an average of just over £100 per day both on-site and off-site
- Visitors staying at UK holiday parks and campsites stay 82% longer and spend 12% more than the national tourism average
- The sector's expenditure accounts for 5% of the UK tourism industry's overall GDP of £214 billion
- 44% of operators provide information on promoting health and wellbeing, while 68% offer access and details on walking and cycling routes, waterways, and beaches
- Walking is a key activity for visitors, with 95% undertaking short walks and 85% engaging in long walks, alongside other outdoor activities such as cycling and swimming (31% of respondents mentioned additional outdoor pursuits)

UK Adventure Sport Sector

2.8.2 Research was undertaken using The Data City platform (https://thedatacity.com/) to calculate the value of the Adventure Sport Sector of the UK Sports Economy. The Sector was defined using SIC (Standard Industrial Classification) Categories and Real-Time Industrial Classifications (RTICs) developed by The Data City and CIMPSA. Adventure Sport is included as a bespoke category. This is defined as activities, services, and venues both indoor and outdoor improving participation in sport perceived as having a high level of risk. It is important to highlight that these figures include indoor activities (e.g. climbing walls, indoor Snowsports centres) so are not totally representative of the outdoor adventure sector.

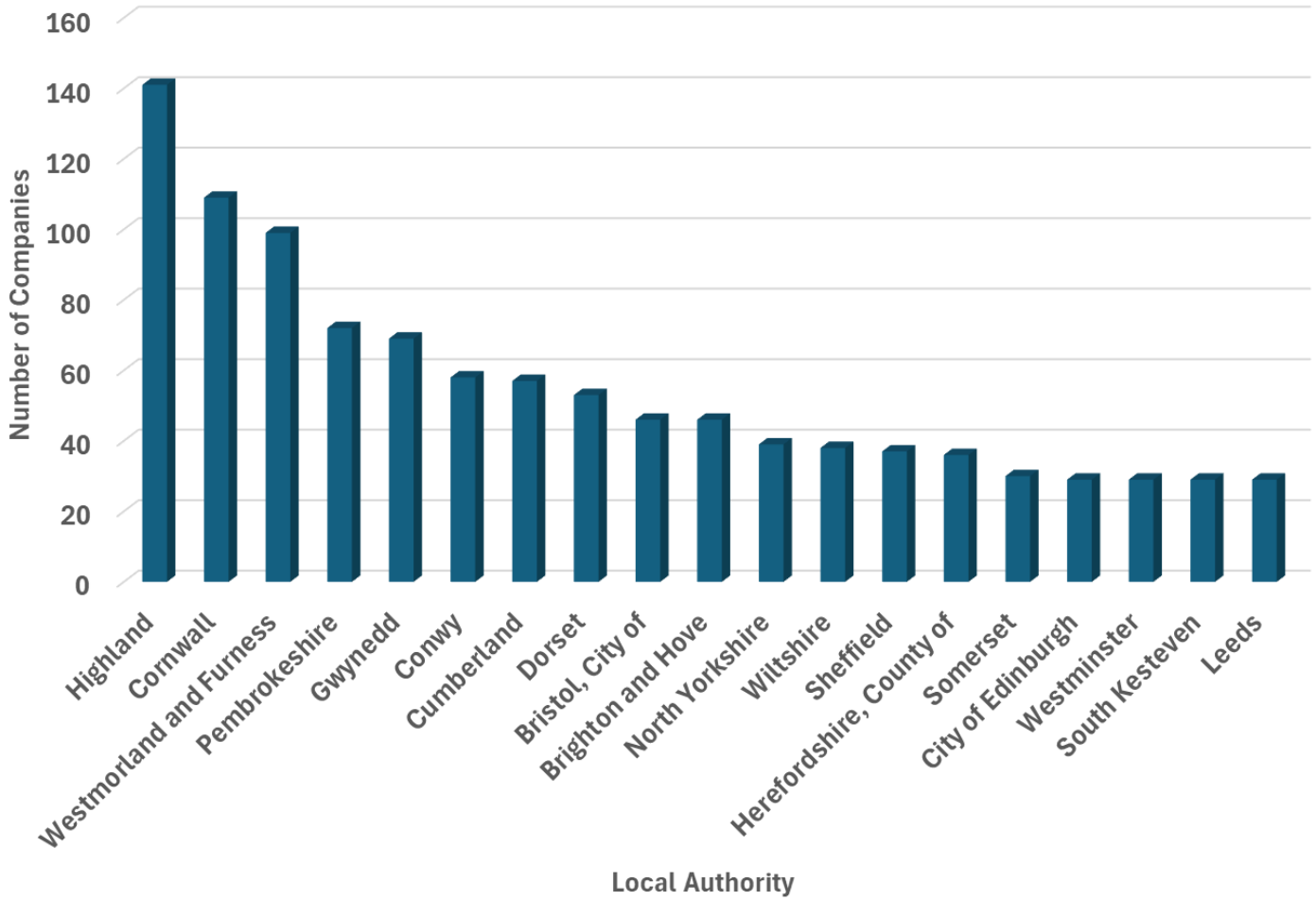
2.8.3 The key findings form this research are:

- Adventure Sport generates £2.37 Billion in GVA (Gross Value Added) to the UK Economy
- This represented 13.1% of the total GVA for the Sports and Physical Activities Sector (£57 Billion)
- This equates to £82,706 estimated GVA per employee
- This was significantly higher than the sport sector average of £43,334
- There are 1,900 companies operating in this sector
- This represents 9.6% of the total companies in the Sport and Physical Activities sector (19,817)
- They generate a total turnover of £2.38 Billion
- This represents 4.2% of the Total Turnover of the Sport and Physical Activities sector (£56 Billion)
- The Adventure Sport sector employs approximately 28,679 people.
- This represents 6.9% of all employment in the Sport and Physical Activities sector (416,513 employees)
- It is estimated that employment in the Adventure Sector is growing at 25%
- This is significantly above the average growth of Sport and Physical Activities sector (13.8%)

Figure 2.1: Map of Geographical Locations of Companies in the Adventure Sport Sector

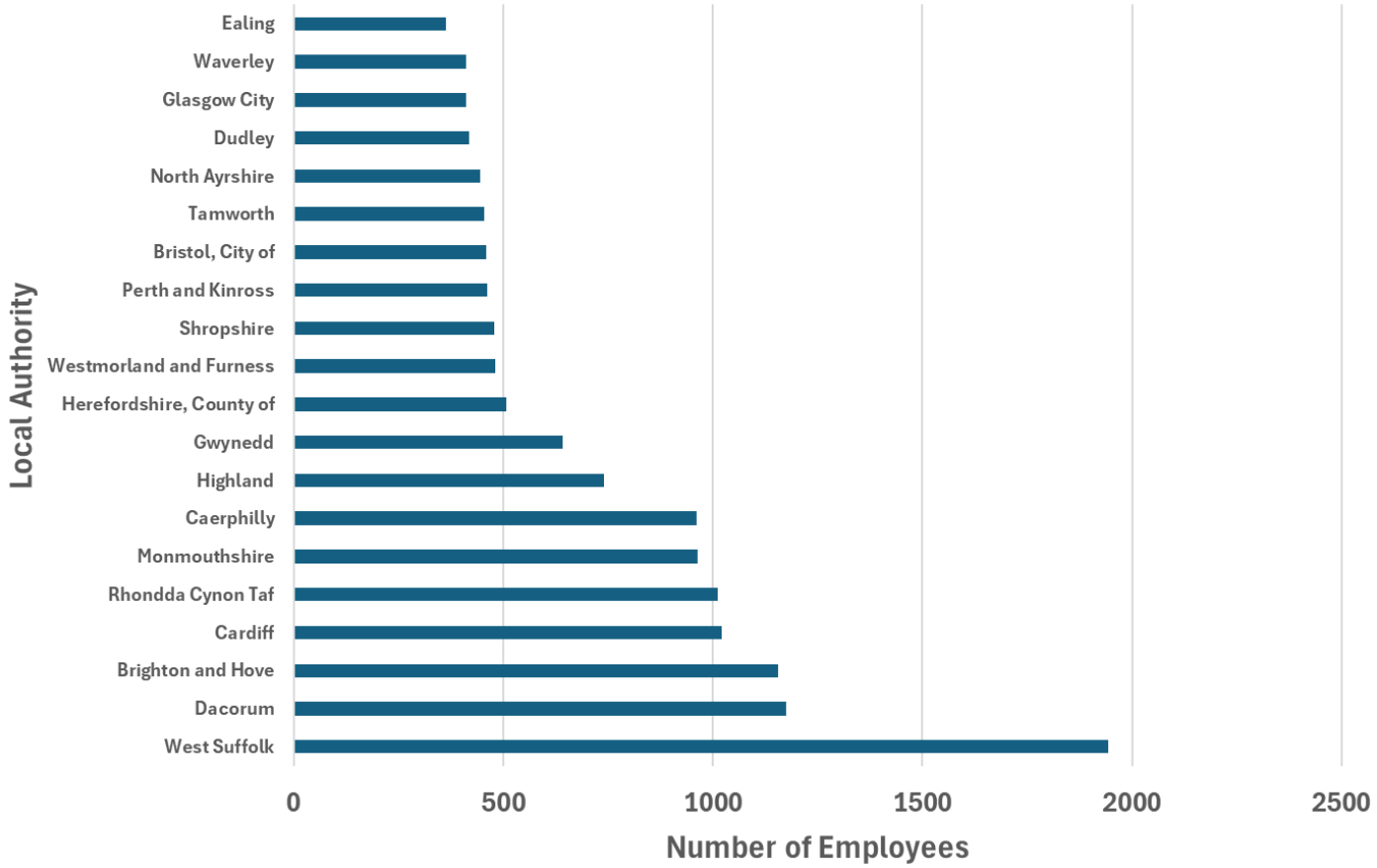
2.8.4 An examination at the level of local authorities by number of companies is illustrated in map above. This shows that of the top eight local authorities in terms of number of companies, all are rural areas encompassing areas that attract large number of tourists and have natural landscapes, including National Parks, that facilitate outdoor adventure activities.

Figure 2.2: Adventure Sport Companies by Local Authority



2.8.5 Utilising Location Quotients, which are a measure of relative concentration of an industry in an area, provides a more detailed analysis. This demonstrates the relative importance Adventure Sport in rural areas that attract large number of tourists and have natural landscapes and National Parks that facilitate outdoor adventure activities. The top seven local authorities all fit into this category such as the Highlands, Cornwall, Lake District (Westmorland and Furness, Cumberland) and areas of National Parks in Wales. Cities and urban areas in the list are also those located close to National Parks, greenspaces and blue spaces (e.g. costal areas).

Figure 2.3: Number of Employees in Adventure Sport sector by Local Authority



2.8.6 In terms of the number of employees by local authority is shown in the graph above. A more mixed picture emerges. With some urban area such as Brighton and Hove appearing in the top 10. There is a significant concentration in employment across local Authorities in South Wales. Utilising Location Quotients, which are a measure of relative concentration of an industry in an area provides a more detailed analysis, a more mixed picture emerges. Some urban areas such as Brighton and Hove appear in the top ten. There is a significant concentration in employment across local Authorities in South and Mid Wales.

Walking and Cycling

2.8.7 The *National Travel Survey* (2024) provides comprehensive insights into walking and cycling patterns across England during 2023.

- Total walking stages (segment of a trip where walking is the primary mode of transport) in England reached 18.76 billion, with 3.32 billion specifically for leisure purposes and 4.98 billion for other leisure reasons (including casual walks but excluding shopping)
- On average, each person in England completed 325 walking stages annually, including 58 stages for leisure and 86 stages for other leisure reasons
- England recorded 925 million cycling stages in total, with 361 million (39%) dedicated to leisure purposes
- On average, each person completed 16 cycling stages annually, including 6 stages specifically for leisure
- 67.8% of adults engaged in walking or cycling for leisure at least monthly, with 57.2% participating weekly, 29.1% at least three times weekly, and 20.5% at least five times weekly
- For leisure cycling specifically, 11.9% of adults participated at least monthly, 6.7% weekly, 1.7% at least three times weekly, and 0.8% at least five times weekly
- For leisure walking, 65.9% of adults participated at least monthly, 54.8% weekly, 26.8% at least three times weekly, and 19.4% at least five times weekly
- The distribution of leisure walking duration among adults was: 2.1% for 1-29 minutes, 12.1% for 30-59 minutes, 22.9% for 60-89 minutes, 7.1% for 90-119 minutes, and 21.2% for 120+ minutes

- The distribution of leisure cycling duration among adults was: 0.6% for 1-29 minutes, 1.7% for 30-59 minutes, 3.1% for 60-89 minutes, 0.9% for 90-119 minutes, and 5.5% for 120+ minutes.

2.8.8 The Yorkshire Dales National Park's *Visitor Honeypot Sites Survey* (2022) of visitors to Hawes, Reeth, Grassington, Aysgarth Falls, and Malham identified that 51% of visitors in 2022 used Rights of Way footpaths. A further 7% of visitors had been on guided walks. The respondents in the survey stated that their motivations for visiting were:

- 22% walking
- 4% recreational activity other than walking/cycling (15% in the village of Reeth)
- 2% cycling (5% in Hawes and Reeth).

2.8.9 According to the North York Moors National Park *North York Moors Visitor Survey* (2021), 48% of visitors participated in walks lasting more than an hour, 36% engaged in gentle walking, and 12% took part in cycling or mountain biking.

2.8.10 The *Realising the Wider Benefits of the Coast to Coast Route Designation as a National Trail* report (Yorkshire Dales National Park Authority with Fiona Southern, Carrock Landscapes Ltd, 2022) estimated that the 6,000 walkers who complete the Coast to Coast route generate £6.8 million in direct economic activity.

2.8.11 Cycling (28%) was the primary reason for using the Trans Pennine Trail (TPT) according to the 2024 *TPT Visitor Survey* (TPT National Team, 2024). This comprised standard bikes (76%), e-bikes (15%), and other varieties (9%) including mountain bikes, gravel bikes, children's bikes, bikes with trailers, tandems, and tricycles. The economic impact of walkers using the TPT was estimated to generate a daily average spend of £46.98, with cyclists having an even higher daily average spend of £68.73.

2.8.12 Moreover, the Sustrans *Walking and Cycling Index* (2023) reveals significant economic, health, and environmental benefits from active travel in Index cities across the UK:

Participation and Demand

- 49% of residents walk or wheel five or more days a week in Index cities, while only 5% cycle with similar frequency
- Half of residents (50%) would like to walk or wheel more, and 43% would like to cycle more
- Strong public support exists for increased investment, with 57% of residents wanting more government spending on walking/wheeling and 47% on cycling

2.8.13 One study found that over 700,000 walkers reported that they were unlikely to take other forms of exercise or even in different localities. The study estimated that the loss of these spaces could result in around £450 million per year in health costs to society (Rolls, 2016).

2.8.14 Mountain Training England (MTE) as described that 22.9 million people are now regularly "walking for leisure" in the UK (a 33% increase since 2018). Furthermore, walking for leisure is the fifth biggest sport by participation within the UK (MTE, 2023). During Covid, walking participation heightened and digital apps such as OS Maps noted an 85% increase in downloads which has helped to make the outdoors more accessible for new audiences (MTE, 2023).

Leisure Activity and Economic Impact

- 1.46 billion walking and wheeling trips (39% of all such journeys) were made specifically for enjoyment or fitness, highlighting the recreational importance of these activities
- For cycling, 70.3 million trips (19% of all cycling journeys) were made for leisure purposes
- The economic benefit from walking and wheeling in Index cities totals £4.8 billion annually
- The economic benefit from cycling reaches £1.3 billion annually
- When residents with cars choose active travel, they generate savings of £563.3 million annually from walking/wheeling and £867.7 million from cycling

Health Benefits and Cost Savings

- Together, walking and cycling prevent 21,426 serious long-term health conditions each year
- Walking alone prevents 17,228 serious long-term health conditions annually, saving the NHS £213.6 million (equivalent to 5.2 million GP appointments)
- Cycling prevents an additional 4,198 serious long-term health conditions yearly, saving £54.9 million (equivalent to 1.3 million GP appointments)
- The physical activity benefits prevent 4,915 early deaths annually (4,444 from walking, 471 from cycling), valued at £17.8 billion
- These activities collectively save 420,000 tonnes of greenhouse gas emissions and create £6.1 billion in total economic benefit.

Hiking, Climbing and Mountaineering

2.8.15 As discussed above, the *Active Lives Adult Survey* (2023) shows that 3.8 million adults are active in hill and mountain walking and 375,900 in climbing and bouldering in England.

2.8.16 Moreover, the Mountain Training England's *Impact Report Summary* (2023) highlights that:

- 22.9 million people regularly walk for leisure
- Walking for leisure is the nation's favourite pastime
- 3.58 million people regularly go hill and mountain walking. This has increased by 33% since 2018 and makes it a more popular pastime than football (approximately 2 million) and the 5th biggest participation sport in the country
- Climbing has grown significantly since 2018, with an estimated 1.5 million climbers in 2023 - of these 278,700 are deemed to be regular climbers.

Orienteering

- In 2023, 41,300 adults regularly participate in orienteering *(Active Lives Adult Survey, 2024)*

Running

2.8.17 The *Active Lives Adult Survey* found that during 2022/23 in England:

- 13. 5% of adults (6.2 million) participated in running
- 400,000 (1.36%) in Fell running

The *SportsShoes Running Report: Running Statistics 2025* (2025) highlighted that:

- 40% of the UK population run at least once a week
- 27% of the UK population say they run one to three times per week (up 5% year on year)
- Over a quarter (28%) want to start or are considering running more in 2025
- Men are more likely to run regularly (44%) than women (35%)
- Millennials (aged 28-43) run more than any other generation
- 1 in 10 (12%) run with their dogs
- Trail running through the countryside, forests, or woods accounts for 10% of all running activity

Outdoor Sporting Events - (SiEntries, 2023)

2.8.18 SiEntries is a UK based an online entry system for outdoor running, cycling, multi-sport, and water sport events. Since 2018, they have worked with 6,700 events and taken nearly 1 million entries with over 180,000 unique participants of which 66% are male and 34% are female.

2.8.19 While men participate more across most entries, cycling entries are particularly male dominant while entries in swimming and water sports are higher for women.

Table 3.5: Gender Split in SiEntries (2023)

Activity	Female	Male

Running/Walking	40%	60%
Cycling	13%	87%
Swimming	60%	40%
Multisport	32%	68%

Age and Demographics

2.8.20 "If we look at our own dataset of 1 million entries, we can see that 30% are in the 40-49 age group and this is 8% more than in the next most popular groups of 30-39 and 50-59. Over a period of 10 years, everyone participating in one of these 10 year cohorts shifts one cohort to the right. If we look at our own 20-29 age group, we see it languishing at 9.3%. On the face of it this is lower than even in the USA, and it would seem to be very bad news. What can be done to entice 20-29's to take part in events?" (SiEntries, 2023, p. 6)

Cost & Growth

2.8.21 80% of the entries taken by SiEntries since 2018 cost less than £50 (around 750,000 events). However, since 2018 the average yearly inflation of event prices was stable at 2.7%. In the immediate aftermath of Covid, inflation of event fees doubled in 2021 and this has since increased to 6.3% in October 2023, marking a significant inflation cost to participants.

2.8.22 The below table has been adapted from SiEntries presentation data to give a general sense of overall event expenditure in terms of event fees. SiEntires has broken the price into brackets and we took a median price for each bracket. It is important to keep in mind that this only represents entry fees paid to take part in events.

Table 3.6: Entrance data for SiEntries

Entry Fee (£)	Median Price (£)	Number of Entries	Total
0-24	£12.00	449,087	£5,389,044.00
25-49	£37.00	278,076	£10,288,812.00
50-74	£62.00	95,766	£5,937,492.00
75-99	£87.00	39,951	£3,475,737.00
100-124	£112.00	14,940	£1,673,280.00
125-149	£137.00	6,785	£929,545.00
150-174	£162.00	6,770	£1,096,740.00
175-199	£187.00	2,272	£424,864.00
200-224	£212.00	1,509	£319,908.00
225-249	£237.00	391	£92,667.00
250+	£250.00	5,366	£1,341,500.00
		TOTAL	**£30,969,589.00**

2.8.23 The above suggests that participants have paid over £30 million in event participation fees. However, this is not the full picture as SiEntries does not work with all events and in recent years (with the digital revolution) it has become easier for organisations to create their own online payment systems. Further, for the £250 and above category, we only used the indicated price, this category is likely to be considerably underestimated. For example, events such as the Cape Wrath Ultra charges participants over £2,000 for a week-long event.

- Although 2021 and 2022 saw the lowest attendance rates at events (due to lingering fears of event cancellations after the Covid-19 pandemic) 2023 marked the highest attendance rates, although likely due to deferred attendances. Interestingly, events tend to chart double digit participation growth in their second to fourth years (between 21-25%) while in the fifth and sixth years, events stagnate and chart almost no growth at all.

- The average participant travels 57 miles each way to attend a typical SiEntries event with ultra running and mountain marathon participants travelling the furthest with an average of 102 and 122 miles respectively.

2.8.24 Considering these factors, such as outdated inflation considerations, low estimates for higher price categories, potential growth in the sector since Covid, and an extremely limited dataset which only captures a segment of the outdoor events industry overall, it is very likely that the outdoor events industry generates far higher ticket revenue than is presented here.

2.8.25 Using other sources such as the International Trail Running Association, we see that within the UK, in 2024, there were 28,785 active runners registered in the 'UK National League' on the International Trail Running Association's (ITRA) website. This was a 37% increase from 2023. ITRA registers participant finishing times for specific sanctioned events all over the world and previously has played a central role in 'ranking' the difficulty of events (a score of 1-6) which helped recreational athletes qualify for more complex events such as 100 mile races.

2.8.26 The number of runners active in the National League only represents the number of runners who ran an ITRA sanctioned event in the UK in 2024. In 2025, there are currently 267 ITRA registered events happening across the UK ranging from 10km trail races to multi-day ultra marathons such as the globally significant Montane Spine Race, which runs the entire 431km Pennine Way over 6 days, non-stop.

2.8.27 What is clear about trail running in particular is that it has experienced a period of generous, sustained growth. This is specifically expressed through running event participation. Although not a UK-centric study, Andersen (2022) found that trail running event participation has grown 231% in the last 10 years. Further, races are becoming much longer, as in 1984 75% of events were at the 5km distance, now this only represents 45%. Both small and large events have grown, the number of small events (with fewer than 500 entries) grew by 629% from 2012 to 2022 while the larger events have grown their participation by 5252%.

2.8.28 Again, this is not UK specific data, however, it does describe a tremendous period of growth of which UK running events are included. A further recent international study conducted by a UK runner and academic (see Morris, 2023) found that 35% of respondents had a household income of over £68,000 per annum. Further, 82% of respondents had obtained at least a bachelor's degree from a higher education institution. Of the runners most dedicated to their training (running the highest average weekly miles), 50.3% of them earn in excess of £75,000pa and 55% have a post graduate degree. Almost all trail runners reported participating in multiple outdoor sports such as road cycling (45%), mountain biking (32%), downhill skiing (25%), canoeing/kayaking (25%), rock climbing (23%), or mountaineering (19%).

2.8.29 Interestingly, respondents also noted remarkably high participation in trail running events, with 14% reporting once or twice per month, 19% every two months, 35% three to five times per year, and 25% one to two times per year. Only 3.6% of respondents reported never entering events. Further, in terms of purchasing habits, Morris (2023) reports that of the 1000+ respondents, 32% had two to three pairs of trail running trainers, while 37% had four to six and 27% had more than six pairs. This marks a significant expenditure on both retail goods (shoes) and services (events).

Blue Space Activities: On Water-Sailing/Boating/Watersports/Swimming

2.8.30 According to the *Watersports Participation Survey 2021* (British Marine / The Nursery, 2022):

- Boating and water sports contributed £2.1 billion to the UK economy in 2021, accounting for 45% of the £4.7 billion economic contribution generated by wider tourism expenditures associated with the boating and water sports sector
- Paddle sports have emerged as exceptionally popular water-based activities, with over 20.5 million people annually participating in these activities across UK waterways.

2.8.31 Moreover, according to the British Marine's The Economic Benefits of the Leisure, Superyacht & Small Commercial Marine Industry (2023):

- The British marine industry experienced 12.5% growth in revenue, reaching an estimated £4.41 billion for the 2022-23 period.
- When accounting for the wider indirect economic contribution to other sectors, total revenue rose to £19.96 billion – including £15.54 billion revenue for hospitality and tourism generated while consumers participated in boating activities
- This growth was partly driven by inflation, with prices rising approximately 4.7% above average inflation levels
- The industry's direct Gross Value Added (GVA) contribution to the UK's Gross Domestic Product (GDP) increased by 6.7% to £1.68 billion, while total GVA reached £3.76 billion
- The products and services provided by the British Marine's members have helped drive up participation in boating and other watersports on the UK's inland and coastal waters to an estimated 13 million people a year
- The marine industry's total GVA, when combined with the tourism and hospitality spend of its consumers whilst participating in boating and other watersports, exceeded £17 billion in 2022-23, as GVA for hospitality and tourism whilst consumers participate in boating activities was £13.61 billion.

2.8.32 In the *Outdoor Swimmer Trends Report*, published by Outdoor Swimming in February 2021, it was highlighted that:

- outdoor swimmers estimated they spent £200 each, on average, on swim-related kit in 2020
- 45% of swimmers increased how much they swim outside in 2020
- The pandemic was a key driver in people taking up open water swimming. 20% of respondents said they started outdoor swimming in 2020, and 23% of those said their local pool was closed and they were desperate to swim anywhere they could
- 20% of outdoor swimmers started the activity to support their mental health and general wellbeing

2.8.33 Academic research demonstrates the significant economic and health value of blue spaces for recreation:

- Börger et al. (2021) found that the average recreational value of a blue-space visit across 14 European member states was €41.32, with the UK showing an even higher value of €50.55 per visit. Their study also revealed that water quality directly influences visitation rates, with lower quality environments limiting psychological wellbeing benefits
- Lynch et al. (2020) documented public willingness to pay between £5.72 and £15.64 (2019 values) to preserve outdoor experiences and improve local environments to gain health benefits from leisure activities
- The practical impact of blue-space improvements was demonstrated by Vert et al. (2019), who recorded a 25% increase in users following renovation of a riverside area, confirming that environmental enhancements drive increased recreational engagement.

2.8.34 According to ***The Value of Swimming*** report by Swim England and Sheffield Hallam University (2023), swimming contributed significantly to social value in England. Key findings include:

- In 2022, swimming generated an estimated £2.4 billion in social value, equating to £228.19 per person
- More than 3.5 million people participate in open-water swimming in England each year
- Of these, over 600,000 individuals are regular open-water swimmers.

Surfing

2.8.35 In a 2015 academic research paper, Mills and Cummins estimated that surfing had a total contribution to the UK economy by domestic surfers of £4.95 billion with an average direct spend of £2,980 per year on surfing-related expenditure. This makes surfing an important contributor to UK tourism and the UK economy. The surfing industry in Cornwall is alone estimated to be worth more than £153 million every year (ITV News, 2023).

2.8.36 In the **UK Surfing & Health 2024 Report (2024)** produced by the University of Bristol and The Wave highlighted that the average surfer spends an estimated £2,101 each year on surfing activities. Most of this is spent on fuel/transport (22.1%), accommodation (20.6%), and board purchases (18.5%). Significantly 96.2% of respondents make their surf-related purchases within the UK, either locally, regionally, or nationwide.

2.8.37 Surfing also has a significant economic impact through the growth of surfing festivals. For example, the annual Boardmasters Festival in Newquay generated £40 million for the local economy in 2022 (South West Research Company) and is identified as a major economic driver for Cornwall. The festival spends £2.1m on local suppliers to stage the event, equating to approximately 321 jobs being supported in Cornwall by this investment. The suppliers and traders at the festival increased their staffing levels for the event, with 67% of those being employed being from Cornwall.

Shooting

2.8.38 According to *The Value of Shooting* by Cognisense (2024), shooting plays a significant role in the UK economy, contributing:

- £3.3 billion annually in Gross Value Added (GVA)
- £9.3 billion in wider economic activity
- £4.4 billion in spending on the UK-based supply chain each year

2.8.39 Additionally, shooting-related activities engage a substantial number of participants, with 293,000 people involved in game shooting and 620,000 individuals actively taking part in shooting-related activities across the UK.

Equestrian

2.8.40 According to the British Equestrian *Annual Report* (2023), the UK equestrian industry is a significant sector with:

- £4.7 billion in industry value
- 19 million equestrian consumers
- 74% female participation, making it the 4th most popular female sport (and it is also the 7th most popular disability sport)

2.8.41 Insights from the *Profile of Urban Equestrian Centres* (British Equestrian & Sport and Recreation Alliance, 2023) highlight the role of urban equestrian centres, where:

- Annual income per horse is £12,369 in private centres and £25,626 in charity-run centres
- Weekly rider numbers average 268 in private centres and 158 in charity centres, generating £25 per rider in private centres and £19 per rider in charity centres
- Income per person within the catchment area is £0.55 for private centres and £0.44 for charity centres
- Moreover, the economic impact of horse riders using the Trans Pennine Trail identified in the 2024 TPT Visitor Survey was estimated to generate a daily average spend of £31.28

Angling

2.8.42 According to various pre-pandemic reports from the Centre for Environment, Fisheries and Aquaculture Science:

- Around 800,000 UK adults (1.6% of the population) participated in sea angling at least once a year, collectively fishing for approximately 7 million days annually
- This popular recreational activity also had a significant economic impact, with sea anglers spending up to £1.3 billion each year, generating a direct impact of up to £847 million
- In 2016-17, this expenditure contributed to a total economic impact of £1.6-£1.9 billion, supporting between 13,600 and 16,300 jobs and creating between £696 million and £847 million in Gross Value Added (GVA)

2.8.43 An Environment Agency case study on angling estimated that, in 2015, 22.5 million days were spent freshwater angling, which in that year contributed £1.46 billion and supported over 27,000 jobs (Environment Agency, 2023).

2.8.44 The *Economic Value of Wetlands: Insights from the Broads* (2024) Report by the Broads Society, highlighted that for angling in the Norfolk Broads National Park:

- 18% of all visitors to the Broads engage in fishing, generating an economic impact over £150 million
- Generates 1.4 million angler days per year

Snow Sports

2.8.45 The Scottish Government's *Snowsports Sector 2022 - Economic, Social, and Cultural Impact* report (2023) highlighted the economic contributions of the snow sports sector in Scotland in 2022 as:

- The total expenditure by day visitors was £3.4 million, while overnight visitors contributed £8.8 million
- Scotland's five ski resorts attracted a total of 89,473 visitors
- Of these, 20% (17,716) were overnight visitors, with the Cairngorm ski area reporting that 40% of its visitors stayed overnight
- The sector generated £15.3 million in net wages
- It contributed £20.1 million in net Gross Value Added (GVA)
- Generated 510 net full-time equivalent (FTE) jobs.

2.9 Outdoor Specialist Market and Retail

2.9.1 According to Statista (2023), consumer spending on equipment for sport, camping, and open-air recreation in the UK reached £10.13 billion, reflecting a strong demand for outdoor and recreational gear.

2.9.2 Additionally, the *European Outdoor Group State of Trade* report (2022) estimated the retail value of the outdoor specialist market in the UK and Ireland at €850.6 million. This represented a 9.8% increase from 2021, which suggests a recovery from the impact of the pandemic and lockdowns. Notable breakdowns across the following categories:

- €518.3 million in apparel - 6.8% increase from 2021
- €152.7 million in footwear - 20% increase from 2021
- €39.8 million in accessories - 19% increase from 2021
- €46.4 million in backpacks - 14.8% increase from 2021
- €53.2 million in tents -5.3% increase from 2021
- €18.5 million in sleeping bags and mats - 6% increase from 2021
- €21.8 million in climbing equipment - 4% increase from 2021

3 Creating Jobs and Skills

3.1.1 Outdoor recreation generates employment across the UK. In particular, it is an important source of employment in rural areas. However, it is important to note that some of the jobs created in the outdoor sector are, like other tourists related jobs, seasonal (summer or winter season e.g. skiing), short term, temporary, and/or part time. Many employees are self-employed (e.g. outdoor activity instructors) or in small to medium enterprises (SMEs).

3.2 National/Regional/Local Economies

Adventure Sport

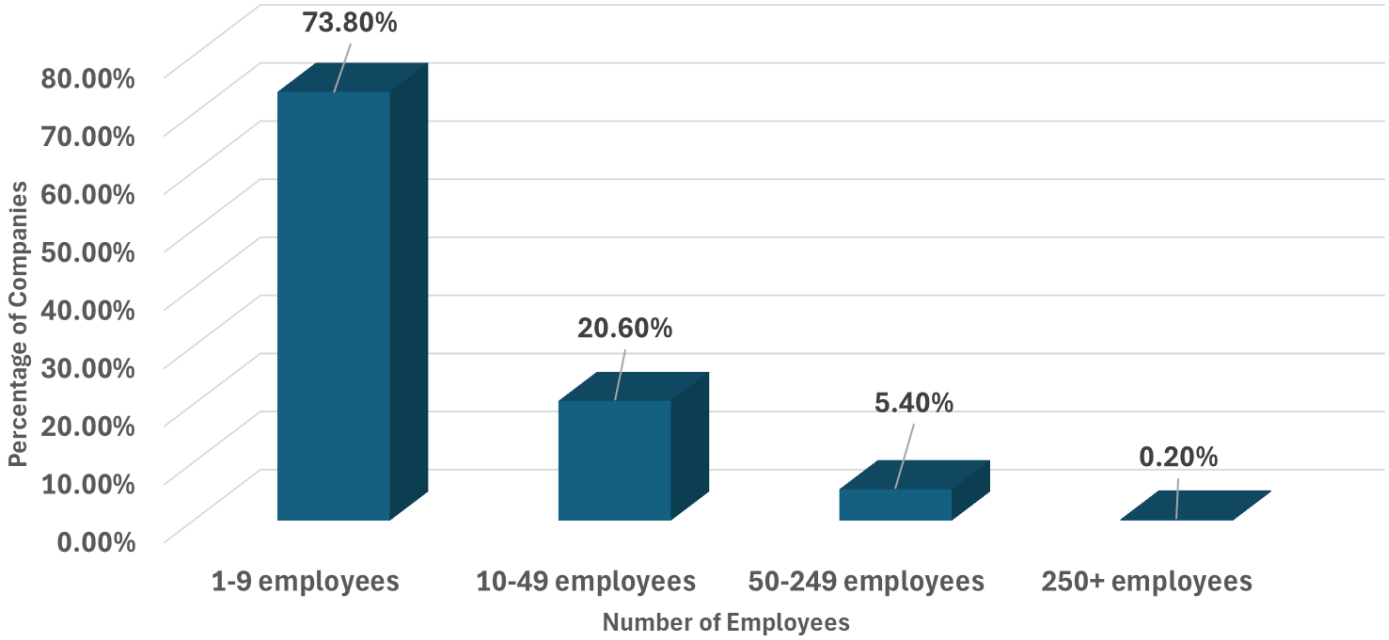
3.2.1 In the *CIMSPA 2023 Workforce Insights Report* (2023) in the definition of core industry, under Sport, adventure sport is included as a bespoke category. This is defined as activities, services, and venues both indoors and outdoors improving participation in sport perceived as having a high level of risk. It is important to highlight that these figures include indoor activities (e.g. climbing walls, indoor Snowsports centres) so are not totally representative of the outdoor adventure sector.

- **Estimated number of employees in Adventure Sport in the UK is 43,391 out of a total sport workforce estimated to be approximately 348,800**
- This represents 12.4% of the total sport workforce
- It was estimated that a total of 5,044 people were recruited into this sector in 2022. This represents 9.6% of all recruitment in the sports sector in 2022

3.2.2 Research was undertaken using The Data City platform (https://thedatacity.com/) to calculate the most up to date employment figures for the Adventure Sport sector. It is estimated that:

- **In 2004 the Adventure Sport sector employed approximately 28,679 people**
- **It is estimated that employment in the Adventure Sector is growing at 25%**
- **The average salary was estimated as £27,250 per annum**

Figure 2.4: Adventure Sport Companies by number of employees



3.2.3 An analysis of the number of employees per Adventure Sport company in Figure 2.4, above, shows that the vast majority are very small SME's, with 73.8% having less than nine employees.

Table 3.7: Geographic Breakdown of Adventure Sport Sector

Geographic Location	GVA	Total Turnover Generated	Employees	Employee Growth
UK	£2.37b	£2.38b	28,679	25%
Scotland	£215.9m	£173.8m	2,842	49.5%
Wales	£1.12b	£1.04b	5,689	38.7%
Northern Ireland	£18.4m	£17.8m	478	10.9%
North East England	£34.5m	£22.1m	655	14.8%
North West England	£171.1m	£157.4m	2,212	23.4%
Yorkshire & Humber	£61.7m	£44.0m	1,013	26.5%
East Midlands	£105.7m	£86.0m	1,092	21.8%
West Midlands	£191.8m	£109.5m	2,499	26.2%
The East of England	£167.9m	£129.9m	3,918	54.4%
London	£224.1m	£193.1m	1,671	16.2%
South of England	£400.8m	£230.9m	3,295	18.1%
South West England	£216.3m	£179.8m	2,728	22.8%

Wales

3.2.4 ***The Economic and Social Evaluation of the Outdoor Activity Sector in Wales Report (2023)*** estimates that the sector in 2021 supported 31,278 jobs. This represented 21% of all tourism jobs in Wales.

Northern Ireland

3.2.5 According to Sport Northern Ireland's Assessing the Economic Impact of Outdoor Recreation in Northern Ireland (2019):

- The sector generates a total Gross Value Added (GVA) of £131.3 million, **supporting 4,804 full-time equivalent (FTE) jobs**—a figure that rises to over 5,600 when unpaid voluntary contributions are considered
- The **commercial outdoor recreation secto**r, which includes retail and accommodation dedicated to outdoor activities **employs 1,157 FTE staff**
- The commercial non-outdoor recreation sector, which provides essential supporting services, employs 1,327 FTE staff
- Public sector contributions come from both central and local government
  - Central government employs 220 FTE staff
  - Local government employs 450 FTE staff

National Parks

3.2.6 The **Yorkshire Dales National Park** Authority's *Within the Park 2012-2023* report (2023) claimed that all **visitors' expenditures generated a total employment impact of 5,371 jobs** in the park

- This was a 5% increase from 2022 (5,114)
- Direct employment was calculated at 4,377 jobs
- Recreation activities generated 424 direct jobs
- An 8.4% increase from 2022 (391)

3.2.7 According to the North York Moors National Park *STEAM Tourism Economic Impacts* (2023), the visitor activity and expenditures support more than 11,682 full-time equivalent jobs locally.

- The recreation sector generates £0.071 million and supports 929 jobs
- This includes spending on a wide range of leisure activities, such as museums, events, concerts, theatre, attractions, and sports participation/spectating
- According to the Exmoor National Park STEAM Tourism Economic Impacts (2023), the visitor economy supported 2,005 jobs directly and a total of 2,529 jobs in total
- The recreation sector supported 181 jobs directly, representing 10.7% of total employment in the national park

3.3 Industry Cases

3.3.1 Standard measures used by ONS (Office for National Statistics) and other government departments to measure employment by industry sectors using Standard Industrial Classification (SIC) are not feasible to use to calculate the employment of the outdoor sectors. Therefore, the following evidence has been collated from available reports and data from specific activities and case studies at national, regional, and local level.

Mountain Leaders - Employment in the Outdoors Case: Mountain Training England Impact Summary (2023)

3.3.2 Mountain Training was established in 1964 and has registered over 195,000 candidates over its time. In the 2021-2022 financial year, 5,635 people registered for Mountain Training England (MTE) schemes and MTE has noted a 20% increase as opposed to their previous reporting in 2018. Of the members registered with MTE and the Mountain Training Association (walking and climbing leaders), these members lead over 2.4 million guided walks and climbing activities each year.

3.3.3 Most members work as freelance/self-employed walking/climbing guides (36%) while for 25% of members, leading outdoor activities is a side job. A further 33% of members report regularly volunteering and of 915 members surveyed, a total of 29,000 volunteer days were reported (MTE, 2023). These volunteer hours are hugely beneficial to the outdoor sector as members educate around the Countryside Code and provide outdoor education to youths.

Marine Industry

3.3.4 According to *British Marine's The Economic Benefits of the Leisure, Superyacht & Small Commercial Marine Industry* (British Marine, 2023), the marine industry's direct workforce grew by 6.6% in 2022-23, reaching 38,336 full-time equivalent (FTE) jobs. When considering indirect contributions, this figure rises significantly to 753,838 FTE jobs, including 43,043 indirect jobs and 672,468 jobs linked to hospitality and tourism as consumers engage in boating activities.

Shooting

3.3.5 The *Value of Shooting* report (Cognisense, 2024) highlights that shooting activities generate 67,000 FTE jobs. Additionally, shooting providers and volunteers contribute to conservation efforts valued at £500 million, equivalent to 26,000 FTE jobs and 14 million workdays annually.

Horse Riding

3.3.6 Data from the *Profile of Urban Equestrian Centres* (British Equestrian & Sport and Recreation Alliance, 2023) reveals that 13 urban equestrian centres support 112 paid staff and 660 volunteers, underscoring their role in both employment and community engagement.

Camping and Caravaning

3.3.7 The *Pitching the Value* report (UK Caravan and Camping Alliance, 2024) states that the caravan and camping sector plays a crucial role in the UK economy, supporting 226,745 full-time jobs across the country.

Snowsports

3.3.8 According to the Scottish Government's *Snowsports Sector 2022 - Economic, Social, and Cultural Impact* report (2023), the snowsports industry supported 510 net full-time equivalent (FTE) jobs.

4 Case Studies of Access to the Natural Environment

4.1.1 The extent of the contribution of outdoor recreation to the visitor economy is closely linked to the level of ease with which individuals can engage with the natural environment. As such the UK's access network plays an important role in maximising the associated economic benefits.

4.2 National Parks

Yorkshire Dales National Park

4.2.1 According to the Yorkshire Dales National Park Authority's *Within the Park 2012-2023* report (2023):

- In 2023, the Yorkshire Dales National Park received a total of 6.67 million visitor days. Based on the Scarborough Tourism Economic Activity Monitor (STEAM) model, these visitors contributed £485 million to the local economy
- This economic activity generated £484.79 million for the Yorkshire Dales National Park economy in 2023, representing a 13.6% increase from 2022 (£426.8 million)
- Day visitors contributed £221.88 million, a 13.3% increase from 2022 (£195.87 million)
- Recreational activities generated an economic impact of £102.45 million in 2023, reflecting a 14% increase from 2022 (£89.88 million)

4.2.2 The Yorkshire Dales National Park's *Visitor Honeypot Sites Survey* (2022), which surveyed visitors to Hawes, Reeth, Grassington, Aysgarth Falls, and Malham, found that 51% of visitors used rights of way (footpaths), while a further 7% participated in guided walks.

4.2.3 The survey also identified the primary motivations for visiting:

- 22% cited walking as their main reason for visiting
- 4% engaged in recreational activities other than walking or cycling (with this figure rising to 15% in Reeth)
- 2% visited for cycling (rising to 5% in Hawes and Reeth)
- 1% cited the Coast to Coast Walk as their primary motivation (rising to 5% in Reeth).

North Yorkshire Moors National Park

4.2.4 According to the North York Moors National Park *STEAM Tourism Economic Impacts* (2023), tourism plays a significant role in the local economy. Key findings include:

- Approximately 8.97 million visitors came to the North York Moors National Park in 2023
- £1.04 billion was generated both directly and indirectly within the local economy through visitor and tourism business expenditure
- Visitors contributed to a total of 14.5 million visitor days and nights spent in the region
- 7.1 million of these were day visits, generating £351 million for the local economy
- 1.9 million visits were made by overnight visitors, resulting in 7.4 million nights spent in local accommodations
- Overnight visitors contributed a total economic impact of £689 million, supporting local businesses and communities
- On average, visitors staying in the North York Moors spend 3.9 nights in the area, with £198 million spent on local accommodation
- Visitor activity and expenditure support more than 11,682 full-time equivalent jobs locally

Economic Contribution of the Recreation Sector

- The recreation sector generates £0.071 million and supports 929 jobs
- This includes spending on a wide range of leisure activities, such as museums, events, concerts, theatre, attractions, and sports participation/spectating

Visitor Activities (North York Moors Visitor Survey 2021)

- 48% of visitors participated in walks lasting more than an hour
- 36% engaged in gentle walking
- 12% took part in cycling or mountain biking
- 9% participated in other outdoor activities

Exmoor National Park

4.2.5 According to the Exmoor National Park STEAM Tourism Economic Impacts (2023), tourism plays a significant role in the local economy. Key findings include:

- £232.41 million was generated directly within the local economy through visitor and tourism business expenditure in 2023
- Recreational activities generated an economic impact of £39.7 million in 2023, representing a 21.2% increase from 2022
- The visitor economy supported 2,005 jobs directly and a total of 2,529 jobs
- The recreation sector supported 181 jobs directly, representing 10.7% of total employment in the national park
- The 2021 Exmoor Visitor survey, undertaken by the Exmoor National Park Authority, outlined that 76% of visitors stated that outdoor activities was one of their prime motives for visiting the national park. A further 5% highlighted country/field sports.
- In the activities undertaken:
  - 60% reported undertaking a short walk of under two hours duration
  - 65% reported undertaking a long walk of over two hours duration
  - 12% participated in watersports
  - 7% in cycling and mountain biking
  - 5% running
  - 3% horse riding
  - 3% country sports including fishing

4.2.6 **Eryri National Park**

4.2.7 In the 2025 State of the Park Report, it was reported that the most recent 2023 STEAM figures showed an estimated total of 4.89m visitors to Eryri in 2023 (an increase of 3.4% compared to 2019 4.73m). This was made up of 3.20m day visitors (4.7% increase compared to 3.06m in 2019) and 1.69m staying visitors (1.67m in 2019).

4.2.8 The total economic impact of the 4.89m visitors to Eyri was £822.49 million. The 3.21m day visitors generated £198.96m and the 1.69m staying visitors generated £523.53m.

Of the visitors surveyed in the report:

- 53% said that they had wanted to participate in outdoor or sporting activities
- The main activities mentioned were walking, hiking, climbing, mountaineering and water sports
- Walking is the single most popular recreational activity in Eryri
- One of the main attractions mentioned was Zip World

4.2.9 The six major paths that were monitored saw an overall –7.83% decrease in usage between pre pandemic figures in 2019 and 2022 figures. All but the Watkin path reported a decrease.

4.3 National Trails

Coast to Coast Walking Trail

4.3.1 The *Realising the Wider Benefits of the Coast to Coast Route Designation as a National Trail* report (Yorkshire Dales National Park Authority with Fiona Southern, Carrock Landscapes Ltd, 2022) estimates that the 6,000 walkers who complete the Coast to Coast route generate £6.8 million in direct economic activity.

- End-to-end Coast to Coast walkers spend, on average, just over £80 per day directly within the local economy on services and accommodation
- The average spend on accommodation is £87 per night
- The total indirect economic impact of Coast to Coast walkers is estimated at £8.7 million, equating to £104 per person per day when factoring in indirect expenditures such as transport (luggage and transfers), shopping, and other miscellaneous expenses
- Coast to Coast walkers account for 3.8% of all visitor days and 5% of total visitor spending within the 5km corridor surrounding the trail
- In some settlements, such as Shap and Kirkby Stephen, the Coast to Coast route plays a crucial role in the local economy

Factors Influencing the Economic Contribution of Walkers

4.3.2 The value added to the visitor economy by an individual Coast to Coast walker depends on three key factors:

- The amount of money available for spending
- The availability of services along the route that align with walkers' spending preferences
- The variety of service options available at any given location

4.3.3 The average total expenditure varies significantly between walkers. A single walker staying in mid-range accommodation (e.g., bed and breakfast), purchasing an evening meal and packed lunch, and using baggage transfer services is estimated to spend approximately £1,200 along the route. However, spending can range from minimal (e.g., wild camping for the entire route) to over £2,000, depending on accommodation choices and support packages.

Challenges and Opportunities

- A key constraint on economic growth and the ability to increase the number of end-to-end walkers is the availability of serviced accommodation along certain sections of the route. This issue is exacerbated by some establishments' reluctance to accept one-night bookings, as well as the impact of COVID-19, which led to the closure of some businesses.
- Despite these challenges, the route remains popular even without official designation and promotion. As the Coast-to-Coast gains National Trail status, there is significant potential to expand business opportunities. Targeted support for businesses can help address accommodation shortages, enhance marketing efforts, and diversify available services—ensuring that the full economic potential of the route is realised.

Trans Pennine Trail

4.3.4 The Trans Pennine Trail (TPT) is a 370+ mile national sustainable transport route that facilitates both recreation and transport. It provides a coast-to-coast connection across the North of England, linking major towns and cities such as Southport, Hornsea, Leeds, Chesterfield, York, and Kirkburton. The entire trail is accessible to walkers and cyclists, with many sections designed for families and individuals with disabilities. Additionally, many miles of the trail are open to horse riders.

4.3.5 According to the *2024 TPT Visitor Survey* (TPT National Team, 2024), trail users engaged in various activities, with the following distribution:

- Walking – 35%
- Cycling – 28%
- Dog Walking – 13%
- Running – 12%
- Horse Riding – 6%
- Wheelchair/Mobility Scooter Use – 1%
- Pushchair Use – 1%

Economic Contribution

4.3.6 The survey identified that walkers, cyclists, and horse riders contribute positively to the local economy, with spending on various services and activities during their visits. The average daily spend per person on the trail in 2024 was reported as £54.04, reflecting an increase from £44.29 in 2023 and £29.10 in 2022.

4.3.7 Breakdown of average daily spending by user type:

- Cyclists – £68.73
- Walkers – £46.98
- Horse Riders – £31.28

Bluespaces – Beaches

4.3.8 A report by the Scottish Government in 2018 on the *value of bathing waters and influence of bathing water quality: final research report* highlighted the importance of and the value of Scottish bathing waters and the influence of bathing water quality to bathers, beach users, and to the national and local economies. Previous literature on bathing water sites identified them as an important asset for the local, regional, and national economy (Tudor and Williams, 2006; Vaz *et al.*, 2009; Gillespie *et al.*, 2016; Reed and Buckmaster, 2015; Phillips and House, 2009; Morrissey and Moran, 2011; Hynes *et al.*, 2013; Ballance *et al.*, 2000).

- A survey of beach visitors in five areas (Ayr, Gullane, Nairn, Portobello, Troon) highlighted walking (49%), dog walking' (29%) swimming (8%) as the most popular activities
- Across the five sites, beach visitors support nearly £20 million in local business turnover, nearly 300 full time equivalent (FTE) jobs, and nearly £9 million in gross value added (GVA).

Bluespaces – Canals and Rivers

4.3.9 The Canal & River Trust Waterways and Wellbeing Valuing Our Waterways Aggregate Benefits to Society & the Economy highlighted the annual economic value boating and wider water-based tourism expenditure generates as over £1.5 billion worth of Gross Value Added (GVA). Furthermore, over 80,000 jobs are directly or indirectly dependent upon our waterways, supporting the visitor economy and marine sector. It also estimated the social value is £4.6bn, which includes £1.1bn cost-saving to the NHS from active use of the waterways and the towpaths.

APPENDIX 3:

SOCIAL VALUE OF OUTDOOR RECREATION

1 Introduction

1.1 What is 'Social Value'?

1.1.1 The UK government defines social or public value as "all significant costs and benefits that affect the welfare and wellbeing of the population" (H.M. Treasury 'Green Book', 2022).

1.1.2 In the context of sport and physical activity, social value has been defined by two reports from Sport England, issued in 2018 and 2024. Such reports have defined the entirety of the social value of participation and volunteering in sport and physical activity in England.

1.1.3 The report uses a peer-reviewed methodological approach to assesses the unique market share of the social value contribution of Outdoor Recreation across two overarching outcome areas. These outcomes are based on those cited in Sport England's latest social value modelling (2024) produced through a partnership between State of Life, the Sport Industry Research Group at Sheffield Hallam University, and Manchester Metropolitan University.

1.1.4 The two overarching areas of measurement are:

- **Primary value**: improved wellbeing for participants and volunteers.
- **Secondary value**: of sport and physical activity to the wider society, including the state.

1.2 Calculating the Social Value of Outdoor Recreation

1.2.1 In 2024 Sport England released the newest version of their social value modelling produced by State of Life in partnership with the SIRC at Sheffield Hallam University and Manchester Metropolitan University

1.2.2 The report identified the total social value of participation and volunteering in sport and physical activity at **£107.2 billion per year**, across primary and secondary value (Sport England, 2024).

1.2.3 This section of the report summarises the approach and key assumptions when calculating the 'unique market share' of the contribution of Outdoor Recreation toward the total value.

1.3 Overview of the 'General Model 2024'

1.3.1 The UK Government defines social value as "all significant costs and benefits that affect the welfare and wellbeing of the population, not just market effects" (HM Treasury, 2020).

1.3.2 The new guidance specifically outlines robust methods to estimate benefits directly felt by individuals (HM Treasury, 2021). This is referred to as 'primary value'. Additionally, physical activity can lead to wider value to society, including to the state. In the updated model, this is referred to as 'secondary value' and is measured across 17 health outcome areas. The total 'secondary value' of sport and physical activity per year in England has been calculated as £10.5 billion (Sport England, 2024).

1.3.3 The General Model 2024 is comprised of numerous evidence-based assumptions connecting social outcomes with participation and volunteering in sport and physical activity. The assumptions can be summarised by expressing that:

"Being 'active' (aka an adult doing 150+ minutes of 'moderate equivalent intensity' physical activity (*or 75+ minutes of 'vigorous' (being out of breath or sweating) activity per week*) *or a child/young person doing 60+ minutes of physical activity per day) has the following impacts…*

Primary Value (Sport England, 2024):

- Participation is associated with improved subjective wellbeing
- Volunteering in sport and physical activity is associated with improved subjective wellbeing

Secondary Value (adult (16+) only data) (Sport England, 2024):

- Reduces risk of coronary heart disease by 14%
- Reduces risk of stroke by 16%
- Reduces risk of type 2 diabetes by 26%
- Reduces risk of breast cancer in females by 12%
- Reduces risk of colon cancer 19%
- Reduces risk of bladder cancer by 15%
- Reduces risk of endometrium cancer in females by 20%
- Reduces risk of oesophagus cancer by 21%
- Reduces risk of gastric cancer by 19%
- Reduces risk of renal cancer by 12%
- Reduces risk of dementia in people aged 65+ by 20%
- Reduces risk of depression by 25%
- Reduces risk of hip fractures in people aged 65+ by 52%
- Reduces risk of back pain by 25%
- Reduced frequency of GP visits by 25%
- Reduced usage of mental health services by 8%
- Participation in sport increases the risk of getting a sports-related injury

1.3.4 There is a 'linear dose-response relationship' between fairly active participation (30-149 minutes) in sport and physical activity, and a reduced likelihood of developing the outcomes identified above.

1.3.5 Notably, the social value calculation for all health-related secondary social value outcomes includes both 'active' and 'fairly active' adults, and the participation definition includes all physical activities considered to be active recreation, such as fitness activities, dance, recreational walking, and moderate-equivalent intensity active travel but exclude household activities not related to formal sport and exercise, such as gardening.

1.3.6 No updates were made to the above assumptions for the purposes of this study.

Calculating Primary Value

1.3.7 The total 'primary value' of sport and physical activity per year in England has been calculated as £96.7 billion (Sport England, 2024).

1.3.8 The 'General Model 2024' used the following process to calculate the 'primary social value':

1. The WELLBY (wellbeing adjusted life-year) model is used to estimate changes in life satisfaction associated with different levels of physical activity and frequencies of sport volunteering. These are converted to monetary value using the approach outlined by (H.M. Treasury 'Green Book', 2022) and more specifically the supplementary guidance on wellbeing valuation (HM Treasury, 2021)
2. Changes in life satisfaction are based on the question "overall, how satisfied are you with your life nowadays?" Respondents answer on a 0-10 scale. A one-point change over 12 months is defined as a WELLBY, which is valued at £15,300 in 2023 prices per HM Treasury guidelines (Sport England, 2024)
3. Using Sport England's Active Lives Survey data, State of Life estimates differences in life satisfaction associated with varying activity levels and volunteering to support sport and physical activity. The survey contains detailed information on each respondent's characteristics, so that a regression analysis can be performed to identify the impact of physical activity and volunteering, other things being equal.

1.3.9 For 2022/23, it is estimated that the total annual primary value of sport and physical activity in England is £96.7 billion. This includes £79.9 billion from the adult participation, £8.6 billion from physical activity in children and young people, and £8.2 billion from adult volunteering to support sport and physical activity (Sport England, 2024).

1.3.10 For an adult, being 'active' is worth £2,500 a year in wellbeing value, while being 'fairly active' is worth £1,200. The average wellbeing value of participation is greater for young people aged 11-16, with being 'active' valued at £4,100 a year, and 'fairly active' at £3,100 a year (Sport England, 2024).

1.3.11 The average per adult values masks differences by subgroup. There are certain key groups who derive significantly more social value from being physically active. These groups include:

- People with disabilities or long-term health conditions (£5,100 per active adult)
- People who exhibit two or more characteristics of inequality (£3,800 per active adult)
- Women (£3,100 per active adult)
- People aged 75+ (£2,800 per active adult)
- People from Asian backgrounds (excluding Chinese) (£2,800 per active adult)

Calculating Secondary Value

1.3.12 The 'General Model 2024' used the following process to calculate the value of each of the 17 measures captured by the 'secondary social value':

1. Sufficient robust evidence demonstrates that a subject population's likelihood to 'do something' (i.e. develop a medical condition) is either increased or decreased by their being 'physically active' (a causal change).
2. This causal change is then applied to the number of people within the subject population known to be 'active' (minimum of 150 minutes of 'moderate equivalent activity' per week for adults or an average of 60+ minutes of physical activity per day for children and young people) or 'fairly active' (doing 30-149 minutes of 'moderate equivalent intensity' physical activity a week for adults or averaging between 30-59 minutes of physical activity per day for children) to produce a 'quantity' (aka the number of people that would be expected to 'do something' if there were zero physical activity being undertaken within the subject population). The 'quantity' can be thought of essentially as the number of units saved or produced by a portion of the subject population being physically active.
3. Sufficiently robust evidence is available to calculate the financial 'unit-value' (the monetary cost or gain per unit) of the causal change.
4. The unit-value is then applied to the 'quantity' to produce a financial expression of the value of the subject group being physically active.

1.3.13 This process is then applied wherever there is sufficiently robust evidence to demonstrate physical activity changes the likelihood of a subject population to 'do something', and where the units saved or produced by that physical activity can be expressed financially.

1.3.14 The above can be more easily understood by way of a practical example. For adults (people aged 16+) who are 'active' (the subject population) there is a reduced risk of developing Type 2 Diabetes (the 'do something') of 26% (the causal change). Using Sport England's Active Lives Data, the 'general model' calculates 619,000 cases of Type 2 Diabetes (the quantity) are averted due to adults aged 16+ being physically active. A single case of Type 2 Diabetes costs £4,297 (the unit value). By applying the quantity to the unit value, physical activity in England is understood to reduce the cost of Type 2 Diabetes in England by £2.66 billion per year.

1.3.15 The study undertaken by the SIRC at Sheffield Hallam University and Manchester Metropolitan University identified 17 'secondary social value' health outcome measures for which sufficiently robust evidence is available to calculate a social value health outcome. The study evidenced a total of £10.5 billion worth of value to wider society per year as a result of adults meeting government guidelines around activity.

General Model Results

1.3.16 The social value derived from the two overall outcome areas is summarised below.

Table 4.01: Primary Value' and 'Secondary Value' Outcomes of Community Sport and Physical Activity – 2022/23

Outcome Area	Cases Prevented	Value
Primary value (improved wellbeing)		
Adults (people aged 16+)		£79,900,000,000
Adults Volunteering (people aged 16+)		£8,200,000,000
Children and young people (ages 11-16)		£8,600,000,000
	Total	**£96,700,000,000**
Secondary value of sport and physical activity		
Coronary heart disease	149,000	£880,000,000
Stroke	107,000	£830,000,000
Type 2 diabetes	619,000	£2,660,000,000
Cancer (7 types)	14,000	£310,000,000
Dementia (65+ years)	57,000	£730,000,000
Depression	1,293,000	£2,780,000,000
Hip fractures (65+ years)	26,000	£500,000,000
Back pain	917,000	£580,000,000
Reduced GP visits	31,630,125 (estimated)	£540,000,000
Reduced mental health service usage	32,873,523 (estimated)	£780,000,000
Sports injuries	-22,615	-£130,000,000
	Total	**£10,460,000,000**
	Outcomes Total	**£107,160,000,000**

2 Calculating the Social Value of Unique Market Share of Outdoor Recreation

2.1.1 Having outlined the approach and principles of the 'General Model 2024', it is now possible to explain the approach to determine the proportion of the total value uniquely attributable to a subject activity (or group of activities), in this case 'Outdoor Recreation'.

2.1.2 This approach is summarised below in the following structure:

- Defining 'Outdoor Recreation'
- Calculating Populations and Unique Market Share
- Calculating the Primary Value of Outdoor Recreation
- Calculating the Secondary Value of Outdoor Recreation
- Results – Social Value of the Unique Market Share of Outdoor Recreation

Generic Data Limitations, Further Assumptions, and Key Decisions

2.1.3 When applying the principles of the approach outlined in this section, a number of limitations were encountered. These limitations required the applications of further assumptions and key decisions which are outlined below.

2.1.4 It should be noted that at every point a limitation was encountered, and a decision was required or an assumption applied, the more '*conservative*' route was followed. This approach was taken with the view to creating the most defensible appraisal of the social value contribution of Outdoor Recreation as possible.

2.2 Defining 'Outdoor Recreation'

2.2.1 The intention for the study is to appraise the social value of the activities within the auspices Outdoor Recreation. Immediately this raised a potential hurdle as 'Outdoor Recreation' can have different classifications.

- Outdoor recreation refers to any physical activity taking place in the natural environment.
- It does not include outdoor pitches (e.g., football, rugby, or golf).
- It does include purpose-built settings—such as canoeing, skiing, and climbing—that have their origins in the outdoors and are predominantly reliant on the natural environment.
- It encompasses all outdoor environments, including countryside, urban spaces, canals, rivers, and coastal areas.

2.2.2 Defining what is meant by 'Outdoor Recreation' does not immediately resolve the issue. In order to calculate the social value of a sport or activity, Active Lives and ALS/CYP data must be used. Following guidance published by Sport England (who administer the Active Lives and ALS/CYP data) it was determined that segmenting the data in such a way to accurately reflect the participation in the activities, and then to calculate the combined unique market share for this group of activities would not be feasible. Instead, a pre-coded 'Activity' grouping of 'Outdoor Recreation' was suggested.

2.2.3 This captures the following 30 metrics for adult data:

1. Abseiling
2. Angling
3. BMX
4. Canoeing
5. Caving
6. Climbing and bouldering
7. Cycling for leisure
8. Cyclocross
9. Fell running
10. Gliding, paragliding or hang gliding
11. Hacking or pony trekking
12. High Ropes
13. Hill and mountain walking, hiking, mountaineering
14. Mountain Biking
15. Obstacle Course
16. Orienteering
17. Other horse riding
18. Parkour/free running
19. Roller skating, inline skating, rollerblading
20. Rowing (on water)
21. Running or jogging
22. Sailing
23. Scuba diving or snorkelling
24. Skateboarding
25. Snowboarding
26. Surfing, board surfing, body boarding, kite surfing
27. Swimming - Open Water
28. Triathlon
29. Walking for leisure
30. Waterskiing

2.2.4 For Children and Young People, 13 activities are considered the to fall within the definition of Outdoor Recreation activities:

1. Adventure or outdoor sports
2. Angling
3. Climbing (including indoors)
4. Climbing or swinging in the playground, garden, or park
5. Cycling for fun/fitness
6. Daily Mile
7. Horse riding
8. Orienteering
9. Running, jogging, cross-country
10. Skateboarding, roller skating/blading
11. Snow sports
12. Walking for leisure
13. Water sport

2.2.5 The approach undertaken means that the vast majority of Outdoor Recreation activities are covered as the 'other' categories allow for unspecified classes to be captured.

2.3 Calculating Populations and Unique Market Share

2.3.1 The general model contains a number of 'subject populations'. Each of these feed into the various 19 social value outcomes:

Table 4.02: Subject Populations and Social Value Outcomes

	Subject Population	Social Value Outcome
Primary value	All participants aged 11-16 (children and young people) and 16+ (adults)	Enhanced mental wellbeing of participants
		Enhanced mental wellbeing of volunteers
Secondary value	All participants aged 16+ (adults)	Coronary heart disease
		Stroke
		Type 2 diabetes
		Colon cancer
		Bladder cancer
		Oesophagus cancer
		Gastric cancer
		Renal cancer
		Depression
		Back pain
		Sports injuries
		GP visits
		Mental health service usage
	Female participants aged 16+	Breast cancer
		Endometrium cancer
	Male participants aged 16+	Dementia
	Female participants aged 65+	Hip fractures
	Male participants aged 65+	
	All participants aged 65+	

2.3.2 To determine participation levels, data from Active Lives Survey (ALS) 2022/23 was used, which was then scaled up to national-level equivalents using ONS (Office for National Statistics) data for England available from UK data service. This ensures a comprehensive representation of engagement across different demographic groups and Actives and Fairly Actives.

2.3.3 Since the impact of participation varies across age and gender, population groups were broken down into multiple groups based on gender and age for instance 'male 16+', 'female 16+', 'male 65+', and 'female 65+' etc. This segmentation is necessary as certain health outcomes are specific to particular cohorts—hip fractures, for example, are only relevant to those aged 65+, while breast cancer risk reduction applies only to females.

2.3.4 The analysis further categorises individuals based on their activity levels. Actives are adults undertaking a minimum of 150+ minutes of 'moderate equivalent intensity' physical activity per week or children and young people undertaking an average of 60+ minutes of physical activity per day), while Fairly Actives are adults doing 30-149 minutes of 'moderate equivalent intensity' physical activity per week or children and young people undertaking an average of 30-59 minutes of physical activity per day. These distinctions are critical, as they directly influence the social value generated by participation. For instance, from an economic and social value perspective, a fairly active adult with 2+ inequality characteristics contributes £2,800, whereas an active adult contributes £3,800. These figures highlight the difference these categories present, reinforcing the importance of Outdoor Recreation.

2.3.5 To understand the role of Outdoor Recreation within overall physical activity, a **unique market share** (UMS) was calculated. This was done by determining the average proportion of time an individual spends on Outdoor Recreation relative to the total weekly physical activity of a 'Outdoor Recreation' participant.

2.3.6 For example, if an individual in ALS reported to have undertaken 200 minutes of moderate intensity physical activity over a given week, comprised of 100 minutes of Outdoor Recreation, and 100 minutes of other activities, then Outdoor Recreation would constitute 50% of the activity 'share' for that individual.

2.3.7 By taking the average UMS of Outdoor Recreation by each population cohort, the '**net population**' attributable to Outdoor Recreation for each outcome area can be calculated.

2.3.8 The results of the exercises outlined above are provided in the tables below.

Table 4.03: Population of participants by category

Primary Value of Participation	'Actives'				'Fairly Actives'				Total Population	
	ALS	Scaled	UMS	Net	ALS	Scaled	UMS	Net	Gross	Net
0 characteristics	56,248	15,297,725	45.35%	6,938,194	7,670	2,086,004,	53.40.%	1,114,019	17,383,129	8,052,213
1 characteristic	37,698	10,252,696	52.71%	5,404,045	6,729	1,830,081	57.43%	1,051,065	12,082,777	6,455,110
2+ characteristics	8,687	2,362,597	56.85%	1,343,184	2,147	583,918	57.93%	338,285	2,946,515	1,681,469
Adult Participants	**102,633**	**27,913,018**	**51.64%**	**13,685,423**	**16,546**	**4,500,003**	**56.26%**	**2,503,369**	**32,413,021**	**16,188,792**
CYP Participants	**46,835**	**1,440,329**	**23.98%**	**345,391**	**16,204**	**501,401**	**28.82%**	**144,504**	**1,941,730**	**489,895**
ALL PARTICIPANTS	**149,468**	**29,353,347**	-	**14,030,814**	**32,850**	**5,001,404**	-	**2,647,873**	**34,354,751**	**16,678,687**
Secondary Value of Participation										
All 16+	105,395	27,621,038	49.57%	13,692,970	17,367	4,551,398	57.91%	2,635,714	32,172,436	16,328,684
Females 16+	57,775	5,342,608	49.22%	2,629,877	10,441	2,543,975	57.33%	1,458,447	7,886,582	4,088,325
Males 16+	47,135	13,619,415	49.73%	6,773,098	6,850	1,979,272	58.87%	1,165,230	15,598,687	7,938,328
Female 65+	12,866	5,342,608	56.61%	3,024,365	2,912	626,604	65.54%	410,661	5,969,212	3,435,027
Male 65+	13,648	2,768,506	56.95%	1,576,537	2,391	449,395	69.35%	311,656	3,217,901	1,888,192
All 65+	26,545	5,342,608	56.77%	3,032,833	5,305	1,067,716	67.30%	718,596	6,410,324	3,751,429

2.3.9 For adult volunteers, ALS data does not enable the share of volunteer time to be calculated across each of the activities that respondents reported supporting. Thus, it is not possible to estimate a UMS of volunteer time by activity. To enable some uplift to be reflected in this report, the lowest UMS reported across a general population has been applied (0 characteristics of inequality = 45.35%). This means a total net population of volunteers can be calculated at just under 150,000. To avoid overstating the value of volunteering in Outdoor Recreation, this figure will be taken forward for use in this report.

Table 4.04: Population of volunteers by category

Primary Value of Volunteering	'Weekly'				'Monthly'				Total Population	
	ALS	Scaled	UMS	Net	ALS	Scaled	UMS	Net	Gross	Net
Adult Volunteers	6,977	1,897,529	45.35%*	860,529	4,555	1,238,820	45.35%*	561,804	3,136,349	1,422,334

2.3.10 For completeness, the table below shows the total number of people with characteristics of inequality participating in activity by Outdoor Recreation.

Table 4.05: Population of Outdoor Recreation participants by characteristic of inequality

Primary Value (ALS 22/23)	Actives		Fairly Actives		Total Scaled
Adult Participants	ALS	Scaled	ALS	Scaled	
Those from lower socioeconomic groups (NS SEC 6-8)	8,521	2,317,450	1,637	445,214	2,762,663
Pregnant women and parents of children under one year	2,152	585,278	491	133,537	718,815
Disabled people & those with a long-term health condition	14,047	3,820,352	3,117	847,728	4,668,080
People from an Asian ethnic group	4,167	1,133,296	865	235,253	1,368,549
People aged 65 or over	26,733	5,467,109	5,067	1,036,241	6,503,351

3 Calculating the Primary Value of Outdoor Recreation

3.1 Calculating Primary Value for Adult Participants

3.1.1 Using the monetary valuation approach highlighted in the primary value report published by **Sport England**, the estimated associated changes (the regression co-efficient) depicting the impact on life satisfaction are multiplied by £15,300 and rounded to the nearest £100 to get the impact of the change in that cohort.

- Using Active Lives data, the total number of 'active' adults who engage in Outdoor Recreation as part of the mix of activities in which they regularly engage, is identified based on 0, 1, 2/2+ characteristics of inequality classification for calculating the **Wellbeing Values of Participation for Adults.**
- On the other hand, for calculating the **Wellbeing Values of Participation for Children and Young People,** there are no splits of characteristics of inequality and has only been split into Actives and Fairly Actives.
- For **Wellbeing Values of Volunteering (Adults)**, the total number of people are split into adults who do volunteering once a week and those who volunteer at least once a month but not once a week, due to the financial impacts these different groups create.
- These values from the ALS 22/23 data are then scaled up to national level equivalents using ONS (Office for National Statistics) data for England for relevant cohorts respectively for both Actives and Fairly Actives.
- Using ALS/CYP, the total number in each category is multiplied by the relevant multiplier (£15,300 equivalent of a particular category e.g. £2500 for Active adults and £1200 for Fairly Active adults).
- The average proportion of this cohorts' 'active time' that is spent on **"heavy" and "moderate" intensity and not "low" intensity** engagement in Outdoor Recreation is then calculated (aka the percentage of the total time the cohort spends being physically active that is spent doing Outdoor Recreation, averaged across the cohort in all activities excluding active travel).
- This average percentage is applied to the original total national equivalent population of physically active people who participate in Outdoor Recreation, to produce a figure representing the 'unique market share' for the subject population

3.1.2 For **Primary Value**, the fairly actives are treated in the same manner as Actives for both Adults and CYP. The way they differ from Actives is based on the multiplier for each individual and the UMS of Outdoor Recreation from their overall mix of activities (aka the percentage of the total time the cohort spends being physically active that is spent doing Outdoor Recreation, averaged across the cohort in all activities excluding active travel).

3.1.3 A regression model estimates the relationship between different 'explanatory variables'. The 'explanatory variables' include the intervention of interest and a set of 'control variables' or factors that can influence the outcome measure in question. Ethnicity, gender, or age could be an example of a 'control variable'. A regression model in essence isolates and estimates the relationship between the intervention in question (e.g. physical activity or sport volunteering) and the chosen outcome measure (e.g. life satisfaction or back pain), once controlling for other important factors.

3.1.4 Therefore, for 'Fairly Active' people (30-149 minutes of 'moderate equivalent intensity' activity per week for adults or an average of 30-59 minutes of activity per day for children), the difference in one 'variable' or factor influencing another 'variable' or outcome, while taking into account influences from elsewhere is directly proportionate to the amount of activity that they undertake (i.e. a linear relationship). This is a cautious assumption given that the CMO guidelines indicate there is curvilinear dose-response relationship between physical activity and health outcomes which suggests that proportionately the greatest benefits come from achieving moderate levels of activity which are below the threshold of the guidelines.

Limitations and Assumptions

3.1.5 For the calculation of duration of Outdoor Recreation, to ensure accuracy and exclude outliers, the duration of Outdoor Recreation was capped at 1,680 minutes per week in the calculation for adults. Additionally, active travel minutes were excluded to maintain precision.

Results of Primary Value of Outdoor Recreation Calculations for Adult Participants

3.1.6 The results of the exercise outlined above are summarised in the table below.

Table 4.06: Primary Value Calculation: Adult Participant Calculations

Active Adults	Population		Multipliers		Value
	ALS	Scaled	Value	UMS	
0 Characteristics	56,248	15,297,725	£2,300	45.35%	£15,957,846,242
1 Characteristics	37,698	10,252,696	£2,500	52.71%	£13,510,113,498
2+ Characteristics	8,687	2,362,597	£3,800	56.85%	£5,104,098,793
Actives Total	**102,633**	**27,913,018**			**£34,572,058,533**
Fairly Active Adults					
0 Characteristics	7,670	2,086,004	£800	53.40%	£891,215,394
1 Characteristics	6,729	1,830,081	£1,100	57.43%	£1,156,171,618
2+ Characteristics	2,147	583,918	£2,800	57.93%	£947,197,597
Fairly Active Adults Total	**16,546**	**4,500,003**			**£2,994,584,609**
Primary Value of Adult Participants	**119,179**	**32,413,020**			**£37,566,643,142**

3.2 Calculating the Primary value of Participation for Children and Young People

3.2.1 Like the adult calculation, the impact was calculated for children and young People.

- Outdoor Recreation participants were segmented into Actives (an average of 60+ minutes of activity per day) and Fairly Actives (an average of 30-59 minutes of activity per day)
- The population in each category was multiplied by the relevant per-person multiplier, and then with their average share of Outdoor Recreation minutes as a share of their average total active minutes factored in to determine their contribution (aka the percentage of the total time the cohort spends being physically active that is spent doing Outdoor Recreation, averaged across the cohort).
- Total Economic Impact: this approach quantified the total social value of Outdoor Recreation at **£1.86 billion for this category**.

Limitations and Assumptions

3.2.2 ALS/CYP metrics are different to the metrics for the Active Lives adult survey data. The same grouping of 'Outdoor Recreation' is not available for ALS/CYP.

3.2.3 For calculation of the activity share of Outdoor Recreation, duration of Outdoor Recreation for CYP was capped at 12 hours on a weekday and at 9 hours on a weekend, to avoid outliers.

Primary Value of Outdoor Recreation Calculations for Children and Young People Participants

3.2.4 The results of the exercise outlined above are summarised in the table below.

Table 4.07: Calculation of Primary Value (III) - Children and Young People participating in Outdoor Recreation.

CYP (11-16)	Actives	Fairly Actives
ALS/CYP Responses	46,835	16,304
Scaled to National Population	1,440,329	501,401
Value Multiplier	£4,100	£3,100
Unique Market Share	23.98%	28.82%
Net Value	£1,416,102,348.08	£447,961,736.84
Children and Young People Participation Total		**£1,864,064,084**

3.3 Calculating the Primary Values of Adult Volunteering

3.3.1 A very similar approach was applied to the volunteers:

- The volunteers were segmented into two categories: adults who do volunteering once a week and those who volunteer at least once a month but not once a week.
- The population in each category was multiplied by the relevant per-person multiplier, and then with their average share of Outdoor Recreation minutes as a share of their average total active minutes factored in to determine their contribution (aka the percentage of the total time the cohort spends being physically active that is spent doing Outdoor Recreation, averaged across the cohort).
- Total Economic Impact**:** this approach quantified the total social value of Outdoor Recreation at **£2.36 billion for this category**.

Limitations and Assumptions:

3.3.2 The financial impact of volunteering was only noticeable for volunteers who did weekly or monthly volunteering and hence only these two categories are included as a part of calculation for this model.

3.3.3 For the calculation of the activity share of wellbeing of adult volunteers impact, in the absence of specific data on volunteering minutes in different activities, an assumption was made at a minimum level of 45.35%, aligning with the activity share of active individuals with 0 characteristics.

Results of Primary Value of Outdoor Recreation Calculations for Adult Volunteering

3.3.4 The results of the exercise outlined above are summarised in the table below.

Table 4.08: Calculation of Primary Value (II) - Volunteers participating in Outdoor Recreation

Volunteering	Weekly	Monthly
ALS Responses	6,977	4,555
Scaled to National Population	1,897,529	1,238,820
Value Multiplier	£2,100	£1,000
Unique Market Share (Estimate)	45.35%	45.35%
Net Value	£1,807,112,015.96	£561,804,789.39
Adult Volunteering Total		**£2,368,916,805**

3.4 Summary of Primary Value

3.4.1 Combined, the elements outlined above represent a total primary value of **£41.8 billion.**

- Adult participation: £37.56 billion
- Children and young people participation: £1.8 billion
- Adult volunteering: £2.3 billion

4 Calculating the Secondary Value of Outdoor Recreation

4.1.1 The unique market share of a specific activity delivered under the umbrella term of 'Outdoor Recreation' for each of the above subject populations is required to develop an activity specific estimation of social value. This is calculated through the following process for secondary value:

- Using ALS/CYP data, the total number of 'active' people (aka adults undertaking a minimum of 150+ minutes of 'moderate equivalent intensity' physical activity per week or children and young people undertaking an average of 60+ minutes of physical activity per day) who engage in Outdoor Recreation as part of the mix of activities in which they regularly engage, is identified. For each of the 17 outcomes, using the differences in prevalence rates stated in the General Model 2024 (Secondary Value report published by Sport England), cases averted are calculated.
- These values from the ALS 21/22 data are then scaled up to national level equivalents using ONS (Office of National Statistics mid-June 22) data for England for relevant cohorts respectively for both Actives and Fairly Actives.

Calculating Secondary Value of 'Fairly Actives' – Linear Dose Response

4.1.2 The above section outlined the approach for calculating the 'unique market share' for active people (aka adults undertaking a minimum of 150+ minutes of 'moderate equivalent intensity' physical activity per week or children and young people undertaking an average of 60+ minutes of physical activity per day). For health outcomes at these thresholds, the risk reduction assumptions included in the General Model 2024 are largely guided by the CMO Guidelines for Physical Activity (Department of Health and Social Care, 2019) and the underpinning evidence.

4.1.3 This leaves the question how to consider the benefits derived from the cohort of people who regularly participate in Outdoor Recreation, but do not do enough exercise to be considered 'active'. This group are defined as 'fairly active' (aka adults doing 30-149 minutes of 'moderate equivalent intensity' physical activity per week or children and young people undertaking an average of 30-59 minutes of physical activity per day).

4.1.4 The assumptions for applying causal changes for 'fairly active' people in the General Model 2024 was derived from a targeted search and review of evidence, and consultation with experts working in physical activity and health. The inclusion of this assumption in the General Model 2024 reflects the consensus of experts working in academia and policy, and the CMO guidelines that lower volumes (less than 150 minutes per week), lower intensities, and lower frequencies of physical activity may also create causal changes, including health benefits (Department of Health and Social Care, 2019).

4.1.5 The research underpinning the General Model found that risk reductions associated with lower volumes of activity are rarely quantified in the literature and where they are, the evidence is wide ranging covering different outcomes, populations, ages, intensities and so on, with the precise effect difficult to establish.

4.1.6 Researchers must endeavour to make sure any change in an outcome measure is, as strongly as possible, caused by the intervention and not by other influencing factors. Applying a 'multiple linear regression' model to existing national data enables the researcher to obtain the closest estimates of causation. This method identifies how a difference in one 'variable' (i.e. the intervention) influences another 'variable' or outcome (i.e. life satisfaction), while considering influences from elsewhere.

4.1.7 For example, under the **secondary value** element of 'depression', someone participating in 150+ minutes of physical activity per week derives a reduction in their risk of developing depression of 25% (the model does not factor in an increased benefit for participating in more than 150 minutes). For someone who is undertaking 75 minutes of activity per week (aka half the amount needed to derive the full benefit), they are considered to receive a reduction in risk of 12.5% (aka half of the causal change benefit) under a linear dose-response relationship valuation.

4.1.8 Using ALS data, the average weekly minutes of physical activity for the cohort were calculated and applied to the unique market share population. The **only difference for fairly actives** arises in the calculation of cases averted, using prevalence rates for each outcome were used, with adjustments made based on **the proportion of active minutes to derive active equivalents.**

4.1.9 This average percentage is applied to the original amount calculated from the multiplication of the associated costs and the total subject population of physically active people who participate in Outdoor Recreation, to produce a figure representing the 'unique market share' for the subject population.

4.1.10 Finally, the total impact values were calculated by multiplying these cases by the respective cost estimates for all 17 outcomes and adjusting to 2023 values using the GDP deflator equivalent to per participant cost of £302 in 2023 from £282 in 2022.

4.1.11 This process is then repeated to produce the **'unique market share'** of Outdoor Recreation for each subject population and then added up to find the total **'unique market share'** of Outdoor Recreation as a part of total social value generated from Secondary Value. The results are summarised below.

Table 4.09: Secondary Value Calculation for Unique Market Share

	Quantity	Value Per Case	Impact (£M)
Coronary heart disease (CHD)	68,656	£5,513	£406.78
Stroke	49,211	£7,234	£382.30
Type 2 Diabetes	281,289	£4,013	£1,208.82
Breast Cancer	2,029	£19,634	£42.78
Colon Cancer	1,987	£16,317	£34.83
Bladder Cancer	502	£24,126	£13.01
Endometrium Cancer	619	£24,126	£16.02
Oesophagus Cancer	603	£24,126	£15.62
Gastric Cancer	388	£24,126	£10.07
Renal Cancer	422	£24,126	£10.94
Dementia	38,581	£11,939	£496.38
Clinical depression	588,864	£2,002	£1,267.04
Hip Fractures	17,294	£17,934	£333.09
Back Pain	417,767	£592	£265.55
Reduced GP Visits	14,937,615	£16	£256.68
Reduced Psychotherapy Services	15,524,821	£22	£366.80
Increased Risk of Injury	10,680	-£5,488	-£62.95
Totals	**31,941,328**		**£5,063.74**

Assumptions and Limitations of Secondary Value

4.1.12 For the Secondary Value calculation, the population has been segmented have into males and females, giving an opportunity to be as accurate as possible from cases averted to costs of each case and further segmenting it into Actives and Fairly Actives. The calculation for Fairly Actives' cases averted followed the same methodology as Actives but included an additional step, adjusting for their proportion of active minutes to derive active equivalents. Similar to primary value, for the calculation of duration of Outdoor Recreation, to ensure accuracy and exclude outliers, the duration of Outdoor Recreation was capped at 1,680 minutes per week for adults and active travel minutes were excluded to maintain precision.

4.1.13 Reduced GP visits and reduced mental health service usage was derived from the Secondary Value Report (Sport England, General Model 2024) by estimating the number of cases through a cost-based approach. The total stated value was divided by costs to determine rough case estimates, which were then converted into a percentage of the total population for application to the Outdoor Recreation impact calculation.

4.1.14 For sport injuries, total number stated by the secondary value report was used to produce a rough percentage, calculated as a percentage of the total population, which was then applied to calculation of Outdoor Recreation impact. All the health outcomes were then further extrapolated to 2023 prices to adjust for inflation as per the Generic Model 2024.

5 Total Social Value of Outdoor Recreation

5.1.1 The total social value generated by participation and volunteering in outdoor recreation is outlined above.

5.2 Who is Participating?

5.2.1 Altogether, a total of 34.3 million individuals, across all age groups, engage in outdoor recreation as part of their blend of activities. This includes over 1.9 million children and young people (aged 15 and under).

5.2.2 Importantly, the average 'share' of active minutes for adults who take part in one or more of the outdoor recreation activities as part of their 'blend' is over 50% for adults. This means that, on average, adults engaging in at least one outdoor recreation activity spend around half their 'active time' engaged in outdoor recreation. For children and young people, this figure is closer to 25%.

5.2.3 Around two thirds of adult participants are male, and one third female. However, when looking exclusively at the 6.5 million people aged 65+ who engage in outdoor recreation, female participants narrowly out number males.

5.2.4 Further analysis of the adult population shows that outdoor recreation engages 2.76 million people from lower socioeconomic groups (NS SEC 6-8), and over 4.6 million people living with disability and long term health conditions. Over 700,000 adult participants are either pregnant women or parents of children under one year in age. Finally, over 1.35 million people from an Asian ethnic group participate in outdoor recreation.

5.2.5 Finally, our study estimates a total of 1.4 million people volunteer their time in support of outdoor recreation.

5.3 How Much Social Value is Generated?

5.3.1 All of this activity produces a total of **£46.8 billion** social value across both the primary (wellbeing) and secondary (health) measures.

5.3.2 Combined, the primary value elements represent a total value of **£41.8 billion.**

- Adult participation: £37.56 billion
- Children and young people participation: £1.8 billion
- Adult volunteering: £2.3 billion

5.3.3 In addition, participation and volunteering related to outdoor recreation produces savings to the health care system of valued at over **£5 billion**.

5.3.4 Areas of greatest impact include preventing:

- over 280,000 cases of type 2 diabetes,
- over 68,000 cases of coronary heart disease,
- just under 50,000 strokes,
- over 6,500 cases of cancer (across various forms)
- over half a million cases of clinical depression, and
- over 400,000 cases of backpain.

5.3.5 Notably, outdoor recreation substantially over indexes on conditions that impact people aged 65+, including over 38,000 cases of dementia, and over 17,000 cases of hip fracture.

5.3.6 Further, the preventative dividend of outdoor recreation is estimated to prevent almost 15 million GP visits per year.

Table 4.10: Social Value Outcomes of Outdoor Recreation in England – based on November 2022-2023 ALS/CYP data

PRIMARY VALUE OF OUTDOOR RECREATION

ADULTS (16+)

Wellbeing Values of Participation (Adults)

'ACTIVES'	Population	Activity Share	Multiplier	Impact (£ mil)
0 Characteristics	15,297,725	45.35%	£2,300	£15,957
1 Characteristics	10,252,696	52.71%	£2,500	£13,510
2+ Characteristics	2,362,597	56.85%	£3,800	£5,104
			'Actives' subtotal	**£34,571**

'FAIRLY ACTIVES'	Population	Activity Share	Multiplier	Impact (£ mil)
0 Characteristics	2,086,004	53.40%	£800	£891
1 Characteristics	1,830,081	57.43%	£1,100	£1,156
2+ Characteristics	583,918	57.93%	£2,800	£947
			'Fairly Active' subtotal	**£2,994**
			Wellbeing Values of Participation (Adults)	**£37,566**

Wellbeing Values of Volunteering (Adults)

FREQUENCY	Population		Multiplier	Impact (£ mil)
Weekly	860,530		£2,100	£1,807
Monthly	561,805		£1,000	£561
			Wellbeing Values of Volunteering (Adults)	**£2,368**

CHILDREN AND YOUNG PEOPLE (11-16 yr)

Wellbeing Values of Participation (CYP)

FREQUENCY	Population	Activity Share	Multiplier	Impact (£ mil)
'Actives'	1,440,329	23.98%	£4,100	£1,416
'Fairly Actives'	501,401	28.82%	£3,100	£447
			Wellbeing Values of Participation (CYP)	**£1,864**

SECONDARY VALUE OF OUTDOOR RECREATION

ADULTS (16+)

Condition / Area	Cases	Multiplier	Impact (£ mil)
Coronary Heart Disease (CHD)	68,656	£5,513	£406.78
Stroke	49,211	£7,234	£382.30
Type 2 Diabetes	281,289	£4,013	£1208.82
Breast Cancer	2,029	£19,634	£42.78
Colon Cancer	1,987	£16,317	£34.83
Bladder Cancer	502	£24,126	£13.01
Endometrium Cancer	619	£24,126	£16.02
Oesophagus Cancer	603	£24,126	£15.62
Gastric Cancer	388	£24,126	£10.07
Renal Cancer	422	£24,126	£10.94
Dementia	38,581	£11,939	£496.38
Clinical Depression	588,864	£2,002	£1267.04
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Reduced GP Visits	14,937,615	£16	£256.68
Reduced Psychotherapy Services	15,524,821	£22	£366.80
Increased Risk of Injury	10,680	£5,488	-£62.95

Total Primary Value of Outdoor Recreation	**£41.79 billion**
Total Secondary Value of Outdoor Recreation	**£5.06 billion**
Total Social Value of Outdoor Recreation (England)	**£46.86 billion**

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