Economic and Social Evaluation of the Outdoor Activity Sector in Wales

Final Report

Pembrokeshire Coastal Forum

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Executive Summary

Context

i. Pembrokeshire Coastal Forum commissioned Miller Research in February 2023 to undertake an Economic and Social Evaluation of the Outdoor Activity Sector in Wales. The work builds on an earlier study[1] which estimated a total economic contribution of £481m annually to Wales from the sector. This work was funded by Welsh Government and administered through Wales Council for Voluntary Action (WCVA) and the Local Nature Partnership (LNP).

ii. The scope of the study covered outdoor adventure activities which fall within the outdoor sector definition outlined by the Wales Adventure Tourism Organisation (WATO). This included the following categories: climbing, water sports, combined water, and rock activities, trekking and land-based activities, caving, and air sports.

iii. This report presents the findings of the research, which was based on interviews with industry stakeholders and on two surveys; for outdoor adventure activity participants and businesses in Wales respectively. The surveys were produced bilingually and were open for responses for two weeks in Spring 2023, attracting a total of 606 responses.

Key Findings

Overview

iv. There has been significant growth and change in profile in the outdoor activity tourism in Wales since the previous study in 2014, predominately around the post-Covid boom in staying visitors to Wales' along with an increase in use of self-catered accommodation (possibly reflecting the rise of Air BnB and other platforms). The motivation for participation has also changed dramatically – to become dominated by those seeking support for mental health and a

[1] The Economic Impact of Outdoor Activity Tourism in Wales: Miller Research 2014 Report

sense of well-being. Almost all survey respondents (99 per cent) ranked these as important factors, with 94 per cent ranking them as extremely or very important.

v. Wales attracts a disproportionately high level of tourism (Nine per cent of GB visitor nights vs less than five per cent of the population). Critically, this has a focus on rural and coastal areas, which traditionally offer fewer employment opportunities in other sectors.

vi. Visitors expressed a high level of satisfaction with Wales as a destination. A total of 94 per cent of respondents said that they would come to Wales again to undertake outdoor activities and the same proportion would recommend Wales as an outdoor activity destination to a friend or relative. Less than half of those responding to the survey (46 per cent) would have visited Wales if they were not taking part in outdoor activities.

vii. The quality of landscape was identified as the most outstanding quality of Wales, with the scenery described as 'unique,' 'peaceful,' 'beautiful' and conveying 'freedom.' In terms of the tourism offer, visitors were highly complementary about:

- the amount of choice available
- the friendliness of the Welsh people
- knowledge of instructors, and
- quality of the hospitality available.

viii. In terms of improvements which could be made to improve the visitor experience, the main factors related to access and infrastructure – including public transport, parking, and toilets. The weather was also seen as a negative.

ix. Outdoor activity tourism businesses were most likely to rate Wales in the top ten activity destinations worldwide (48 per cent of respondents), although 45 per cent placed Wales in mid table. This reflected the view of visitors, that Wales offers very good quality landscapes, but needs more support in terms of infrastructure and access to green and blue spaces. However, almost two thirds of businesses felt that Wales' reputation as an outdoor destination had improved over the last three years – possibly as a result of Covid-19 driven staycations leading people to experience what Wales has to offer.

x. Wales experienced a significant increase in domestic tourism as a result of the Covid-19 pandemic, with many visitors from England taking their main holiday in Wales in light of limited options for travelling abroad. At the same time, there was a recorded decrease of 88 per cent in overseas visitors and a 90 per cent fall in income generated from overseas visitors in 2021 compared with 2019.[2]

xi. The Outdoor Education (Wales) Bill could provide a significant boost for the sector, both in terms of a projected £9.9m-£13.6m additional annual spend with providers, but also, critically, by introducing all children in Wales to the benefits of experiencing outdoor activities.

Economic Contribution of the Sector to Wales

xii. Participant survey data was triangulated against official data from the Great Britain Visitor Survey 2021 to model the number of outdoor activity visitors staying for three or more hours, a full day or for at least one overnight.

xiii. The results were linked to spending estimates drawn from our survey to calculate the overall annual sum spent by those taking part in outdoor activities (the gross benefit of spending in the sector). This suggests that the total income from trips associated with outdoor activities in Wales was £1.6bn in 2021.

Table 1 - Outdoor Activity Tourism Overall Spend by Participants

	3+ Hrs	Day Trips	Staying
Spend/day (Survey data), £	31.45	64.23	160.13
Numbers (OAT from GBVS)	14.50	4.00	5.56

[2] Written evidence submitted by the Office of the Secretary of State for Wales and the Department for Digital, Culture, Media and Sport on the current position of the tourism sector in Wales, 2021.

Total spend by trip length (£m)	456.03	256.92	890.96
Total spend (All trips) (£m)			1,603.91

Source: GBVS 2021, Participant Survey

xiv. In terms of economic impact to Wales – two components were considered:

- The impact of outdoor activity tourism on the Welsh economy in terms of additional spending in Wales that would not occur otherwise. This is based on spending from people resident outside of Wales on activity in Wales, and the recycling of that money by businesses receiving the spend. It therefore includes multipliers to account for money recycled in the Welsh economy through investment in inputs and salaries. This gives a total net impact of £1.619bn annually and 31,278 jobs supported (21 per cent of all tourism jobs in Wales[3])

Table 2 – Economic Impacts of the Outdoor Activity Tourism sector

	2023	2014
Total expenditure, £m	1,604	601
Additional expenditure to Wales	1,148	304
Direct Impact		
Output £m	1,619	429
Employment (FTEs Full Time Equivalent)	29,428	7,551
Total Net Economic Impact		
Output (£)	1,825	481
Employment (FTEs)	31,278	8,243

- The economic impact of outdoor activity tourism *businesses* in Wales. This is based on the proportion of visitor survey

[3] Based on £3.4bn GVA and 151,000 total jobs taken from Wales Visitor Economy Profile 2021, although a 2013 estimate from Visit Britain estimated the tourism economy in Wales to be larger, worth £6.9bn and supporting 206,000 jobs.

respondents who reported using an activity provider and their average spend to model the income to providers.

- This suggests an overall income to provider businesses of £114.98m annually, of which 38 per cent is spent in local communities and a further 37 per cent across Wales as a whole. Using the same multipliers as above, this suggests a net economic impact of outdoor activity tourism businesses of £272.87m annually, of which £205m is retained in Wales.
- The retention of 38 per cent of income in local community represents a significant contribution to foundational economy in many rural and coastal areas of Wales.
- It is interesting to note that individuals who engage with an outdoor activity provider tend to stay longer and have a significantly higher spend per day. This suggests that engagement through organised access to land and water are to be encouraged if Wales is to maximise the return on its natural assets, whilst limiting environmental damage through overuse.

xv. Both the participant and business surveys demonstrated the importance of mental health and wellbeing as motivating factors for participating in outdoor activity tourism. Using the proportion of respondents who focused on mental health benefits (63 per cent) and an estimate for the preventative health value of that for an estimated 20 per cent of vulnerable participants, we calculate the mental health value of the sector to be £26.54m to Wales and £47.5m to the UK.

xvi. Further, sensitivity analysis using figures based on a model prepared for Sport England suggest that a 10 per cent increase in participation could bring about an increase in social value of £187m spread across physical and mental health, mental wellbeing, individual development, and social capital.

xvii. This suggests that additional investment in infrastructure to provide access for more vulnerable individuals would pay back through the health service under the prevention agenda.

1. Introduction

Background

1.1. Pembrokeshire Coastal Forum commissioned Miller Research in February 2023 to undertake an Outdoor Activity Tourism Impact Study for Wales. This study serves to update the understanding of the economic impact of the adventure activity sector and consider the social value of these activities in Wales. This is with the view of setting a baseline of current social and economic value to enable a strategic plan for adventure tourism.

1.2. This study builds upon work undertaken by Miller Research in 2014 on the economic impact of outdoor activity tourism in Wales and provides survey analysis, an impact assessment and visitor profiling of the sector.

1.3. The scope of the report, and activity classifications within it were aligned to Wales Adventure Tourism Organisation (WATO) definitions of adventure and associated activities. These are as follows:

> "Adventure is where the focus is on engaging with the natural environment in a physically challenging manner where skill and an element of risk are central to the experience and the participant seeks to appreciate the aesthetic qualities of the natural environment in a peaceful manner."

1.4. The core 'guided activities' that fall within the outdoor sector definition, as defined by inspection/accreditation schemes for adventure activities in the UK, are listed under the following categories:

- Climbing: abseiling, bouldering, ice climbing, rock climbing, ropes courses (inc. zip wires)
- Water sports: board surfing, canoeing, diving, improvised rafting, kayaking (inc. river, sea, surf kayaking and sit-on-top kayaking), sailing, kite surfing, stand up paddleboarding, white water rafting, wild swimming, windsurfing

- Combined water and rock activities: canyoning, coasteering, gorge walking, sea level traversing
- Trekking and land-based activities: bushcraft, coastal walking* (excluding urban areas), fell running, hill walking, horse trekking, lowland & moorland walking, mountaineering, mountain biking, off road cycling, orienteering, road cycling (excluding urban areas), scrambling, skiing, snow boarding
- Caving: caving, potholing, mine exploration
- Air sports: paragliding.[4]

Relevant Past Research and Policy

The Economic Impact of Outdoor Activity Tourism in Wales, Miller Research 2014

1.5. In 2014 Miller Research was commissioned to undertake an economic impact study of outdoor activity tourism in Wales. The study utilised both primary and secondary research to understand the experiences of visitors and businesses and to determine the contribution of the sector to the wider economy.

1.6. Findings from this research indicated that Wales is a top-rated destination for outdoor tourism and adventure experiences, and it was apparent that the demand for outdoor activity tourism was increasing. The demand for and availability of outdoor tourism activities had precipitated business expansion by service providers in the industry. However, barriers to productive, collaborative, and sustainable growth in the industry that emerged from the research included high levels of competition and over-saturation of services and offerings.

1.7. The lack of collaboration between players in the industry was said to run the risk of a disjointed activity tourism experience in Wales. Those within the sector also noted that government support through policy

[4] WATO Definition of Adventure and associated activities May 2023

would be necessary if the sector were to effectively contribute economic benefits to Wales to the fullest extent.

1.8. The industry, however, still contributed a significant amount to Welsh GDP. The total estimated annual contribution of outdoor activity tourism to the economy of Wales was approximately £481m or 6 per cent of the total economic contribution of all tourism in Wales.[5]

Domestic GB Tourism Statistics (overnight trips) 2021

1.9. This report provides data on overnight trips by British residents to destinations throughout Britain for April to December 2021.[6] During the reporting period, a total of £1,979 million was spent on over 9.97 million overnight trips to Wales - representing seven per cent of GB visitor spend.[7]

1.10. Wales experienced eight per cent of all trips by GB residents, despite itself accounting for less than five per cent of the GB population. Roughly 51 per cent of these trips taken to Wales were leisure visits. This implies Wales is a significant leisure travel destination, in addition to travelling for business purposes or visits to friends and relatives, which together made up 33 per cent of trips.

1.11. Table 3 outlines the number of trips, nights, and spend associated with domestic visits to the nations of Great Britain.

Table 3 - UK Visitor spend 2021

	England	Scotland	Wales
Trips (millions)	100.20	13.61	9.97
% GB trips	84%	11%	8%
Nights (millions)	337.34	47.06	36.52
% GB trips	80%	11%	9%

[5] The Economic Impact of Outdoor Activity Tourism in Wales: Miller Research 2014 Report
[6] January to March 2021 data is unavailable due to Covid-19 travel restrictions during this time.
[7] Domestic GB Tourism Statistics (Overnight Trips): 2021

Spend	£22,233m	£2,991m	£1,979m
% GB trips	82%	11%	7%

Source: GBTS

1.12. An interesting finding from the report is around the types of locations visited in Wales compared to locations visited in GB as whole. In Wales, 74 per cent of trips included visits to the countryside, villages, small towns, and seaside / coastal towns, while only 59 per cent 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.

Development of the Outdoor Education (Wales) Bill

1.13. A significant step that has been taken in support of the tourism industry in Wales is the proposal of the Development of the Outdoor Education (Wales) Bill. The proposed bill outlines an obligation for Local Authorities to provide funding for young people to have the opportunity to participate in outdoor and environmental education.[8]

1.14. Local Authorities would be responsible for ensuring that these activities and statutory obligations are undertaken. The bill requires that for at least one week at some point in a child's schooling, they will participate in a residential outdoor education programme.

1.15. This is an important and beneficial national objective, with the proposed Bill indicating a move from an enrichment activity to an entitlement component of the Curriculum for Wales. Research has shown that exposure to nature and fostering an understanding of the natural world has direct links with encouraging its protecting and pro-environmental behaviour.[9] Furthermore, there are widely referenced pieces of research demonstrating the benefits it has on mental health.[10]

[8] Development of the Outdoor Education (Wales) Bill
[9] The Importance of Pro-Environmental Behaviour in Adolescent
[10] Nature and mental health

Welcome to Wales: Priorities for the visitor economy 2020 – 2025

1.16. The strategic document for the tourism industry in Wales[11] identifies that the sector has enjoyed strong growth from the domestic market in recent years, including a 14 per cent expansion in 2019 alone. The report states that “tourism in Wales has been transformed; our outstanding natural landscapes are now alive with high-quality, inspiring experiences,” and cites innovative adventures at the top of the list of what Wales has to offer. “Epic adventure” forms one of three pillars of the core offer to visitors.

1.17. However, it is noted that growth in the sector needs to be sustainable, delivering on social, environmental, cultural and well-being goals as well as economic performance.

[11] Welcome to Wales: Priorities for the visitor economy 2020 - 2025

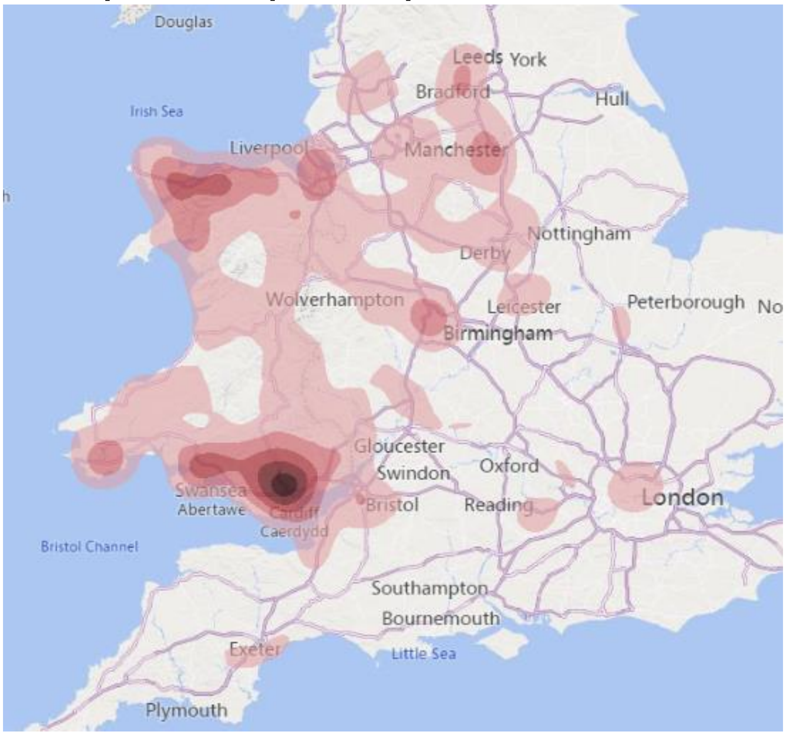
2. Research Findings

Research Approach

2.1. Two surveys were developed, for outdoor adventure activity participants and businesses in Wales respectively. The surveys were produced bilingually and were open for responses between 27 February and 12 March 2023. An extensive marketing campaign was led by Pembrokeshire Coastal Forum to promote the survey.

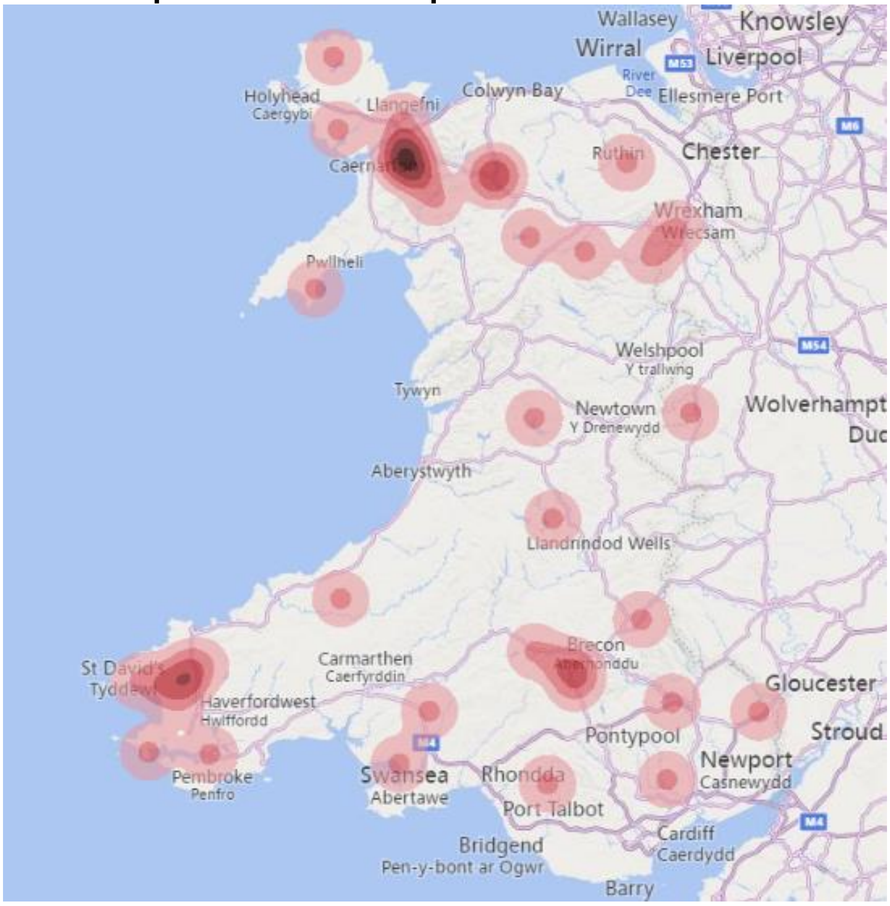
- The participant survey received 563 complete responses, with 36 responses received in Welsh. Figure 1 indicates that the highest number of respondents were centred around Cardiff and South East Wales, with higher numbers of responses also received from participants in West Wales and North West Wales.
- The business survey received 43 complete responses, and none were submitted in Welsh. The location of businesses responding reflects the “hotspots” of the Eryri, Bannau Brycheiniog and Pembrokeshire National Parks, as indicated in Figure 2.

Figure 1 - Heat Map of Participant Respondent Locations



Source: Participant Survey

Figure 2 - Heat Map of Business Respondent Locations



Source: Business Survey

2.2. In addition, four in depth, qualitative interviews were conducted with outdoor activity providers from across Wales to gain a greater understanding of the strengths and challenges of outdoor activity tourism in Wales and how the sector can be developed in a way which sustainably meets the needs of visitors, providers and local communities.

Approach to analysis

2.3. Survey responses were analysed question by question using a combination of SmartSurvey, Microsoft Excel, PowerBI and manual qualitative coding.

2.4. Further analysis was undertaken through triangulating responses and utilising existing sources, including proxy indicators developed from a wide range of research sources such as the GB Visitor Survey and a range of research on mental health costs.

2.5. Microsoft PowerBI was used to generate word clouds identifying frequently mentioned themes and phrases.

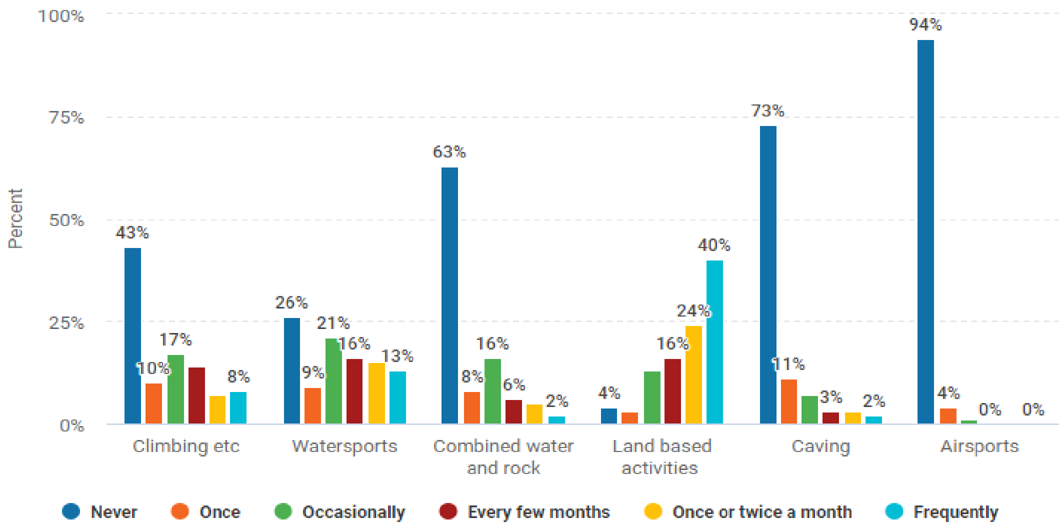
Findings

Activity Information

2.6. Firstly, respondents were asked whether they had participated in an outdoor activity within the past year. Of the 563 respondents, 87 per cent indicated that had undertaken an outdoor activity in Wales in the last year. Those who had not were screened out of the remainder of the survey.

2.7. The activities undertaken most frequently by participants were land-based activities, in which 96 per cent of respondents had participated in Wales in the past year, as indicated in Figure 3.

Figure 3 - Which of the following outdoor adventure activities have you undertaken in Wales in the last year and how frequently?



Source : Participant Survey Q2, n=487

2.8. Land-based activities in this study include bushcraft, coastal walking (excluding urban areas), fell running, hill walking, horse trekking, lowland and moorland walking, mountaineering, mountain biking, off road cycling, orienteering, road cycling (excluding urban areas), scrambling, skiing, and snowboarding. The variety of activities included in this activity and the ability to undertake many of the activities in this category without the need for specialist equipment shows that this category offers accessible activities with mass appeal.

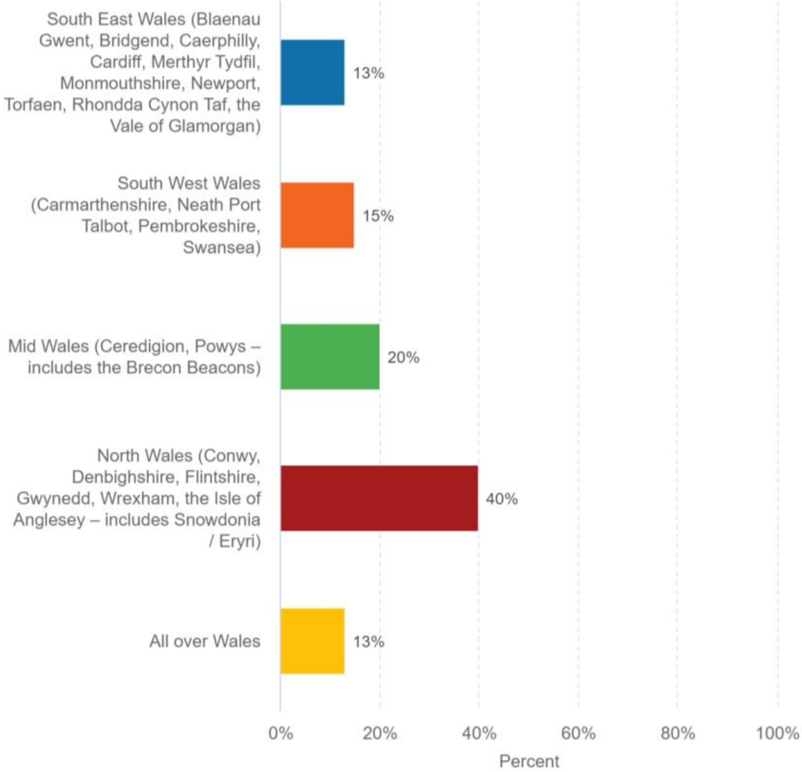
2.9. The variety of outdoor activities available in Wales was noted by several providers during interviews, with a skew towards the sector promoting low cost, accessible activities which are beginner friendly and offer broader social benefits, alongside large flagship activity centres such as ZipWorld and Adventure Parc Snowdonia which have a predetermined outcome and appeal to a wider market. Conversely, more niche activities, such as motor or blood sports were felt to be less well promoted and not recognised by industry bodies such as Wales Adventure Tourism Organisation (WATO) and others.

2.10. In contrast, only six per cent of survey respondents had undertaken an air sports activity in the past year, and 27 per cent had undertaken a caving activity.

2.11. The most popular location for participants to undertake their most regular activity was North Wales (40 per cent), followed by Mid Wales (20 per cent), as indicated in Figure 4. It can be seen that 13 per cent of participants undertook activities in more than one region regularly.

2.12. Outdoor Activity providers noted that North and Mid Wales, had a more developed Outdoor Activity sector than in South Wales, with VisitWales investing a lot of money in promoting key attraction activities such as Zipline and Adventure Parc Snowdonia. By comparison, it was felt that Outdoor Activity providers in the South of Wales tended to be smaller, less developed, and less well promoted.

Figure 4 - Thinking about the activity that you have undertaken most frequently in the last year, where do you typically undertake this outdoor activity in Wales?

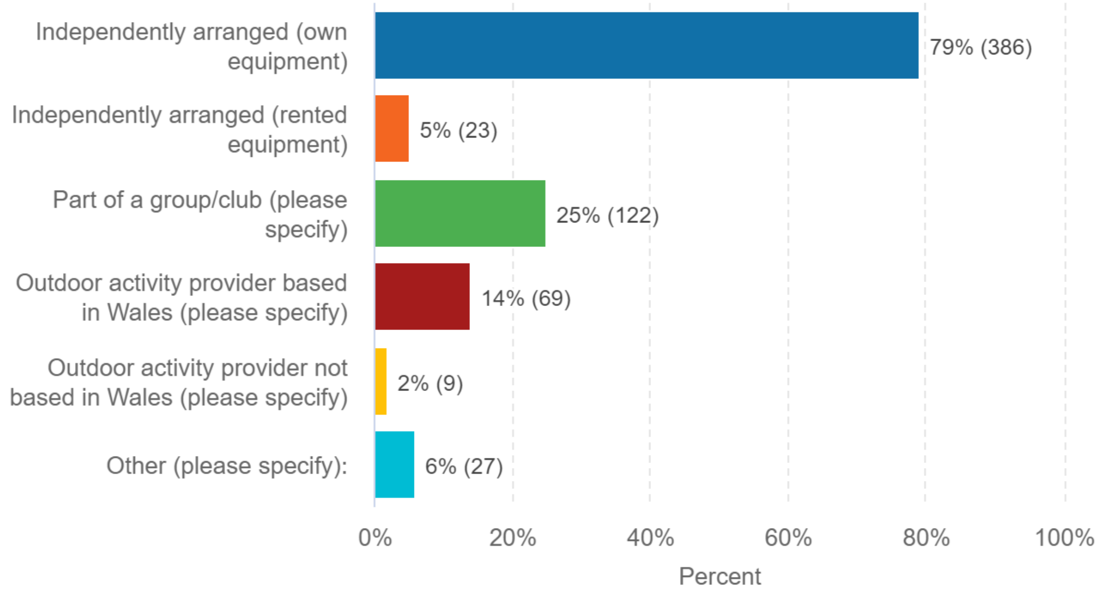


Source : Participant Survey Q3, n=488

2.13. Most participants (79 per cent) independently arranged the activity they undertook most frequently, as seen in Figure 5.

2.14. Outdoor activity providers highlighted the shift towards greater emphasis on independently arranged activities and equipment hire since the pandemic, which was linked to the rise of social media in reaching new audiences of people with less experience of conducting outdoor activities. Providers raised concerns that through this trend there would be greater risks to the safety of visitors through conducting activities without a guide or the necessary experience and qualification to conduct activities safely. Anecdotally, one provider had noted an uplift in the number of mountain rescues conducted since the pandemic. In addition, there were concerns that independently arranged activities would be less coordinated and were more likely to lead to large influxes of visitors into smaller areas with insufficient facilities to service visitor demand alongside local demand.

Figure 5 – Which of the following would you say best reflects the activity you have carried out most frequently in the past year?



Source : Participant Survey Q4, n=489

2.15. The participants who specified 'other' comprised responses from participants who felt they felt they did not fit into the categories listed – for example those undertaking horse-trekking despite this being included in the Wales Adventure Tourism activity list which was in scope of this survey.

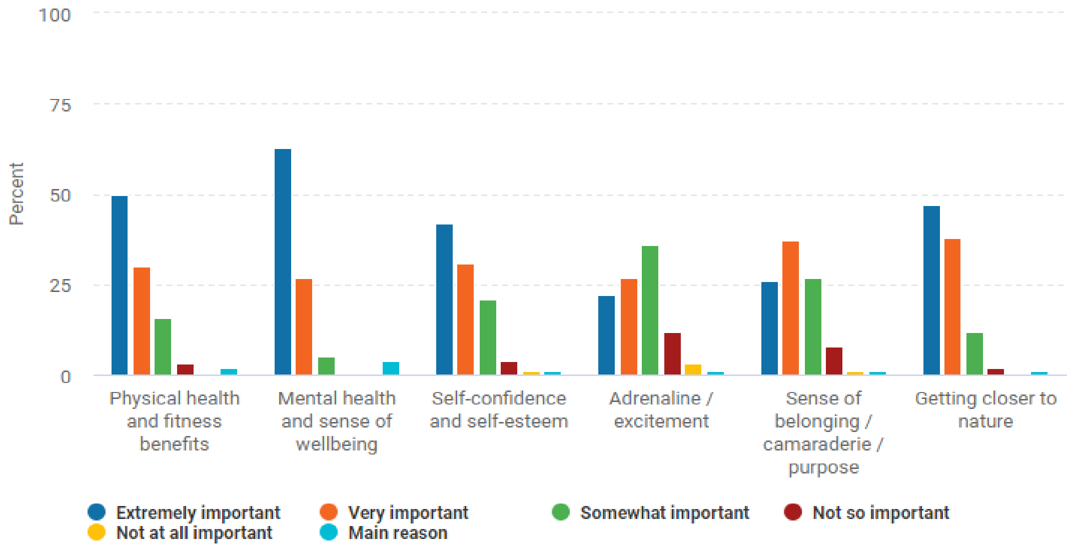
2.16. Those who independently arranged to rent equipment were most likely to do so via dedicated facilities such as boating, canoeing, mountaineering, hiking, riding, cycling, or running clubs.

2.17. The majority of activity and equipment providers listed by survey respondents were evenly spread throughout Wales depending on the nature and where the preferred activity was taking place. A number of activities were facilitated and organised through education providers such as universities, membership groups (notably kayaking, mountaineering, caving, and cycling) and commercial stables, amongst others.

Reasons for participating in outdoor activity tourism

2.18. When participants were asked to rate the specified reasons for taking part in outdoor adventure activities, as indicated in Figure 6, mental health and a sense of wellbeing ranked most highly, with 99 per cent of respondents ranking this as important.

Figure 6 - Reasons for taking part in outdoor adventure sports - individuals

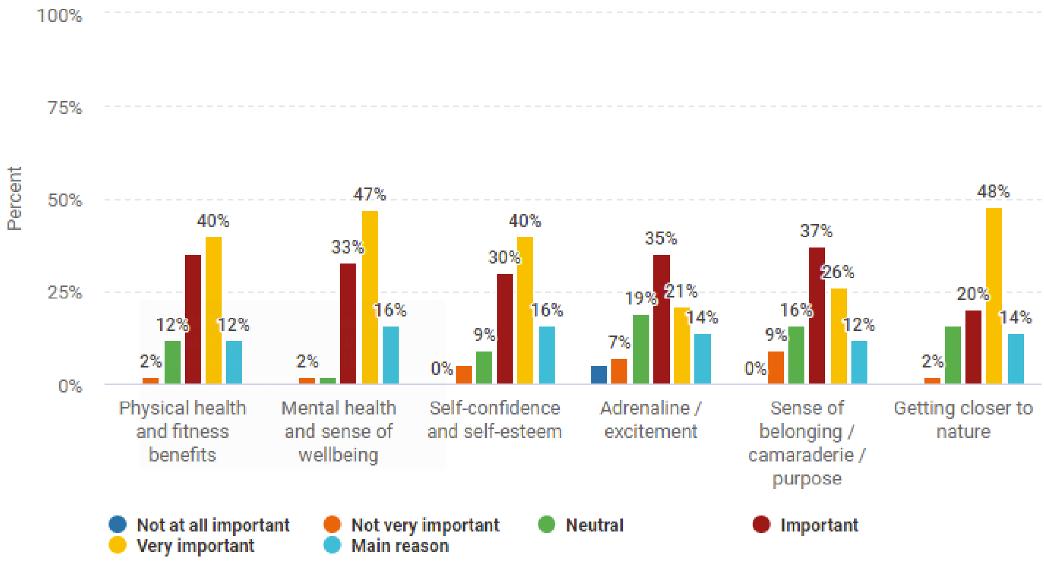


Source : Participant Survey Q5, n=489

2.19. Businesses were similarly asked to rate various benefits of outdoor activities and to identify which one is most important to them and their business.

2.20. Outdoor activity providers noted several potential reasons that their customers would be attracted to taking part in outdoor activities in Wales including a sense of adventure, being exposed to 'rugged and wild' natural landscapes, socialising, learning new skills and improving their sense of wellbeing.

Figure 7 – Business perceptions of benefits to visitors of outdoor activities



Source: Business Survey Q12, n=43

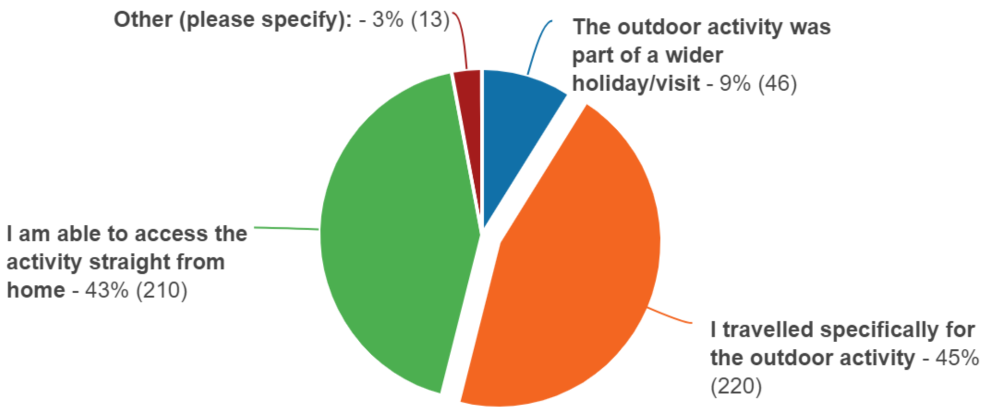
2.21. Getting closer to nature and mental health and well-being were rated as “very important” by the largest proportion of business respondents. It was also most likely to be rated as the main reason that visitors take part in certain outdoor activities, alongside building self-esteem and self-confidence. As per the graph, Figure 7, the lowest-rated benefit was that of adrenaline/excitement.

2.22. Business respondents outlined other benefits that they thought their visitors gained from taking part in the outdoor activities that their business offers. These included:

- Life- and personal-skills development
- Education around Welsh culture, value, history, and uniqueness
- Leadership and teamwork development
- Controlled exposure to risk or survival situations
- Some respondents stated that all options were of equal importance.

2.23. Forty-five per cent of individual respondents, as shown in Figure 8, indicated that they travelled specifically to undertake the outdoor activity, followed by 43 per cent who indicated they can access the activity straight from home.

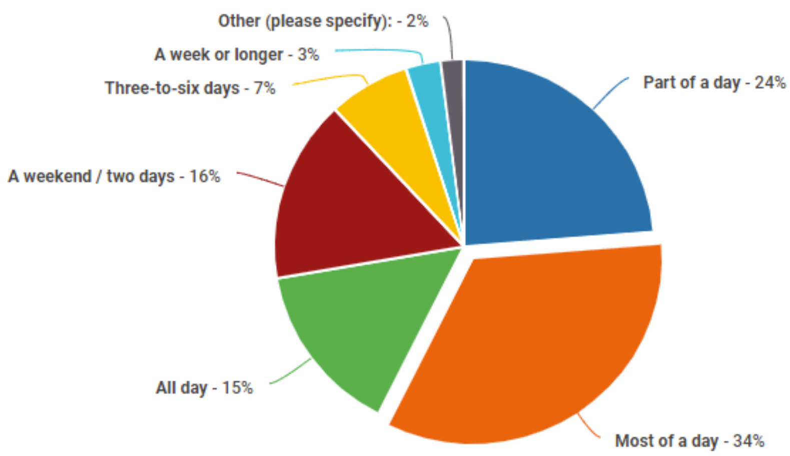
Figure 8 - Thinking about the last time you took part in the activity in Wales, which of the following best describes your visit?



Source : Participant Survey Q6, n=489

2.24. Participants were most likely to stay for part or most of a day (57 per cent) undertaking the activity, as shown in Figure 9.

Figure 9 - Continuing to think about the last time you took part in the activity in Wales, how long did you spend undertaking the activity?

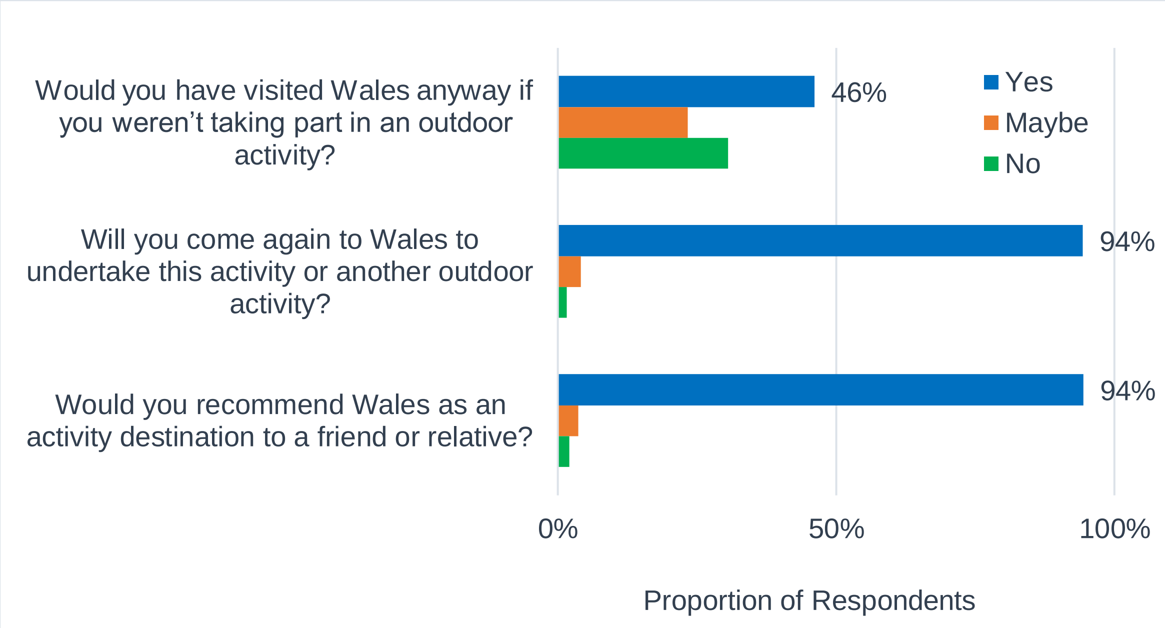


Source : Participant Survey Q6, n=488

Visitor Satisfaction

2.25. Ninety-four per cent of participants indicated that they would come again to Wales to undertake outdoor activity, as shown in Figure 10.

Figure 10 – Visitor Satisfaction Survey Questions



Source : Participant Survey Q12, Q13, Q14. N=193, 193, 196

2.26. Similarly, 94 per cent of participants would recommend Wales as an activity destination to a friend or relative. Less than half of respondents would have visited Wales if they were not taking part in an outdoor activity.

2.27. Survey respondents were then asked to describe the best part of their experience of outdoor activities in Wales.

2.28. Of the 147 responses to this question, over half mentioned the quality of the landscapes in Wales, describing the scenery as 'unique', 'peaceful', 'beautiful' and conveying 'freedom'.

2.29. Also mentioned by several respondents were:

- the amount of choice available
- the friendliness of the Welsh people
- knowledge of instructors, and
- quality of the hospitality available.

2.30. The following word cloud, Figure 11, indicates words mentioned most frequently.

Figure 11 - Please describe the best part of your experience of outdoor activities in Wales.

Source : Participant Survey Q15, n=147

2.31. The following quotes from the participant survey demonstrate the sentiment mentioned by participants:

- “It’s unique, and it’s beautiful, and it’s relatively close and accessible”
- “We saw some seals and dolphins in the ocean, we saw some insects in the vegetation and some sea birds flying around. Watching the wildlife whilst listening to the sounds of the ocean was brilliant. It was very relaxing, and I felt really happy and content.”
- “The beautiful views around every corner and the dramatic landscapes that are good for the soul!”
- “The landscape and the cultural heritage of outdoor pursuits that I feel like I can connect with.”
- “The environment is so diverse it’s an area that has everything. From climbing In Pembrokeshire to walking in Brecon. And paddling on the Conwy.”

2.32. Respondents were then asked whether there was anything about their experience of outdoor activities in Wales that could have been improved. Responses to this question are summarised in the word cloud in Figure 12 below.

Figure 12 – Is there anything about your experience of outdoor activities in Wales that could have been improved?

Source : Participant Survey Q16, n=111

2.33. The four key recurring themes mentioned by participants were ‘parking,’ ‘access,’ ‘public transport’ and ‘weather.’

2.34. A lack of provision for large numbers of cars was listed by fifteen respondents, which directly linked to poor public transport provision to popular areas.

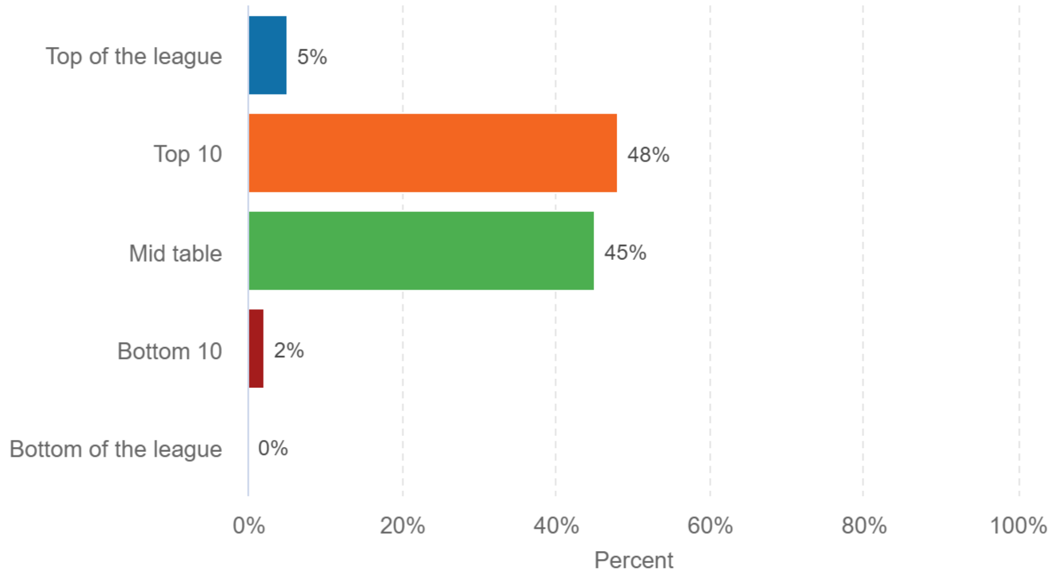
2.35. Some participants felt that there is a disconnect between undertaking an activity outdoors and the carbon impacts of accessing it by car, with isolated locations in Snowdonia provided as examples. Similarly, transport was listed as a barrier to access for disadvantaged groups accessing outdoor activities.

2.36. Some participants mentioned they would like to have the ability to bring outdoor activity equipment on public transport, and that provision for this could be improved. Examples were mentioned of mountain biking in the Alps, where this is commonplace.

2.37. The availability of facilities such as public toilets was listed as lacking in more popular areas, as well as poorly maintained visitor facilities which could be improved. The recently refurbished Ogwen Visitor Centre / Canolfan Cwm Idwal in the Snowdonia National Park was listed as an example of good practice.

2.38. To further explore the reputation of Wales as an outdoor activity destination, businesses were asked to rank Wales in an international league table of outdoor activity destinations. The most popular choice, illustrated in Figure 13, was Wales in the top 10 of destinations, rated by 48 per cent of businesses, followed by 45 per cent of businesses who ranked Wales in the middle of the league table. These ratings were slightly lower overall than in the 2014 survey.

Figure 13 - If there was an international league table of outdoor activity destinations, where would Wales come?



Source: Business Survey Q24, n=42

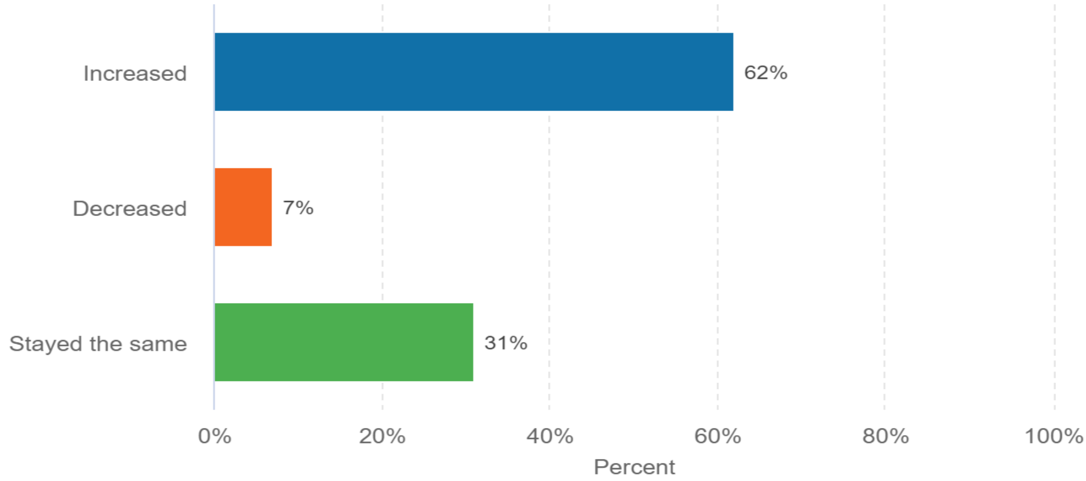
2.39. Several reasons were given why businesses felt that Wales ranked middle of the table, and why they ranked Wales above or below other outdoor activity destinations. These included statements such as:

- "Wales has access to some of the best outdoor venues across the board from cliff Climbing in Pembrokeshire to the best surf at Whitesands and Rhossilli."

- “It is generally a good place, but the rainy reputation puts some people off, especially from November to April. In America and Australia, Wales is not seen as separate to England.”
- “Wales has an amazing natural environment which supports a huge range of outdoor activities; is very welcoming to visitors; and has a great support network within the industry BUT Welsh Government could do more to support e.g., access to green and blue spaces and development of the outdoor activity workforce.”
- “I am erring towards mid table, due to accessibility, transport links and over-popular areas. We don't protect and respect our outdoor activity destinations as well as we could.”
- “We have everything in terms of activity locations but are restrained by the constant use of certain locations by the same people/providers/customers. Engagement with event organisers would improve matters.”
- “Top 10 might be a bit high, but certainly not 'Mid Table'. Only really the scale of the natural features that suffers in comparison - Wales has much to offer but the Alps, Andes, Himalayas, Rockies, Scotland etc are massive wild areas by comparison.”

2.40. Businesses primarily felt that the reputation that Wales has for being an outdoor activity destination has increased, shared by 62 per cent of businesses and indicated in Figure 14. Some respondents felt that “staycations” in light of Covid-19 related travel restrictions in 2020 and 2021 meant that more people were discovering areas closer to home.

Figure 14 - Over the past three years has Wales' reputation for being an outdoor activity destination increased, decreased, or stayed the same?



Source: Business Survey Q25, n=42

2.41. In addition, the influence of social media was mentioned, with "influencers" sharing images of outdoor activity destinations in Wales, resulting in exposure to a wider audience of places to go in Wales.

2.42. The impact of marketing was seen as both a positive and a negative. The negative connotations of "Wales is closed" messaging which was shared in relation to the (often differing) restrictions between England and Wales during the Covid-19 lockdowns was mentioned. This was in addition to the "tourism tax;" a reference to the proposed visitor levy[12] which is currently being consulted upon by Welsh Government.

2.43. Additional comments included the observation that local education authority provision is shrinking, whilst the private sector is increasing. Adrenalin fuelled experiences like Zip World and Adventure Parc Snowdonia add to the perception of Wales as an adventure activity destination.

[12] [Proposals to introduce a Visitor Levy for Wales]

Economic effects of outdoor activity tourism

Approach

2.44. The approach taken to estimating the economic effects of the outdoor activity sector is based on the UK Treasury Green Book Methodology. This follows the following approach;

Economic Impact of Outdoor Activity Tourism (Net Benefit) = Number of visits X Ave. spend per visit (Gross Benefit) - Adjustments made for deadweight and displacement + Direct and indirect multiplier effects

2.45. In this study data sources used are as follows:

- Number of day visits drawn from Great Britain Day Visits Survey 2021. This divides visitor data into short trips of three hours plus and day trips and provides data for those visiting who “took part in sports or outdoor leisure activities.” Data was not available for the period January to March 2021 and so these figures are an under-estimate based on nine month’s data.
- Number of staying visitors taken from GB Domestic Overnight Tourism[13]. This provides data on the proportion of visitors coming to Wales for a holiday but does not break down visitors by choice of main activity.
- Data for overseas visitors from the International Passenger Survey for 2021. This saw a fall of 88 per cent in overseas visitors and the total visits were recorded at 28,000.
- Data for average spend per visit has been drawn from the participant survey.

Visitor spending

2.46. Respondents to the participant survey were asked to think about how much they spent per person per day, the last time they took part in

13

outdoor activities in Wales. Results show that overall, the average spend on the activity itself was £29.00 per person, with an associated wider spend of £31.62 (Table 4). The data was then broken down to estimate the spend by three categories of visitor aligned to the GB Visitor Survey categories of those staying three hours or more, those staying a full day and those staying for at least one overnight. The estimate was conducted using “I live within travelling distance in Wales” as a proxy for three hours or more, “I live within travelling distance within England” as a proxy for a full day and those listing forms of accommodation for the overnight stayer group. Results were sense checked by cross tabulating spend figures against the length of time that each respondent said they had spent last time they undertook an outdoor activity, and the outcomes were broadly comparable.

Table 4 - Average spend per day for undertaking outdoor activity tourism activities

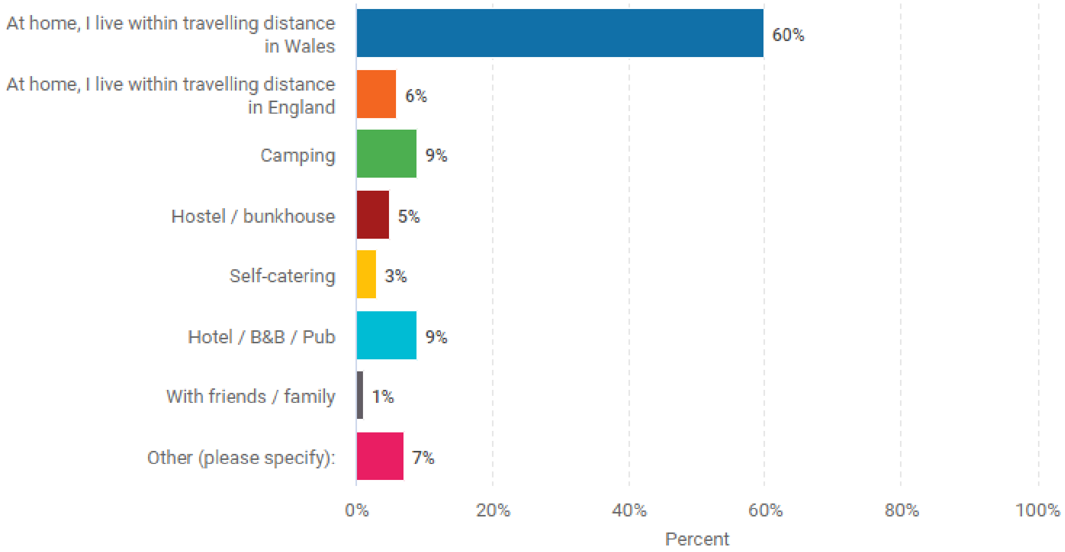
Category	Short Trip £	Day Trip £	Staying £	Average spend £
Undertaking the activity	18.70	26.55	51.15	29.00
Other spend excluding accommodation	12.76	37.68	69.47	31.62
Accommodation			39.51	60.62
Total daily spend, £	31.46	64.23	160.13	

Source : Participant Survey Q8, n=486

Staying in Wales

2.47. Those responding to the survey, who stayed at least one night in Wales were most likely to be staying in catered accommodation or camping (nine per cent each), although the “other” category (primarily campervans or mountain centres / club huts) was also significant at seven per cent.

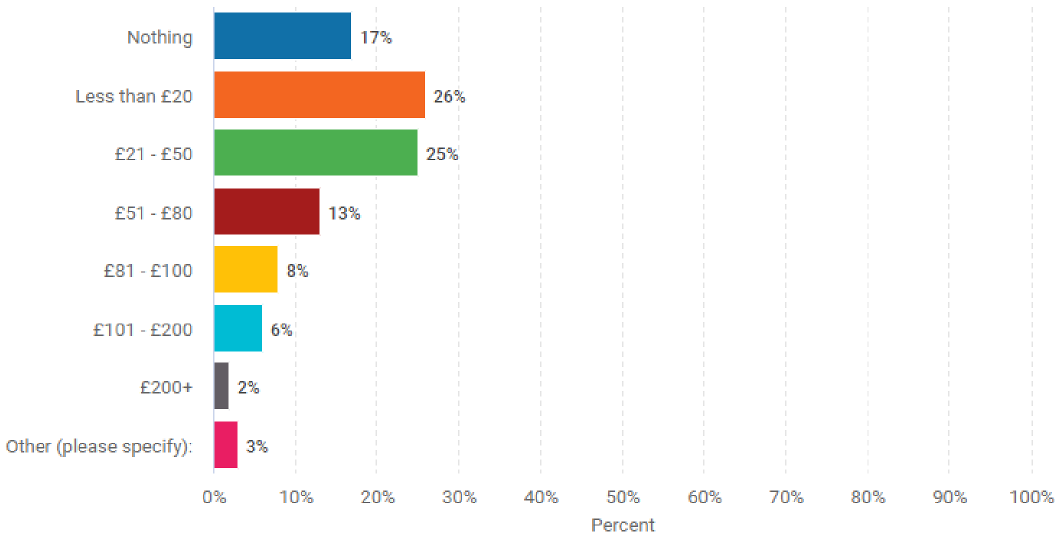
Figure 15 - As part of your trip to undertake the outdoor activity, where did you stay?



Source : Participant Survey Q9, n=489

2.48. The average nightly spends amongst those who said that they stayed in Wales was £39.51, although the largest group of people spent less than £20 per night on average.

Figure 16 - How much did you spend on your accommodation only, in Wales, per person, per night?

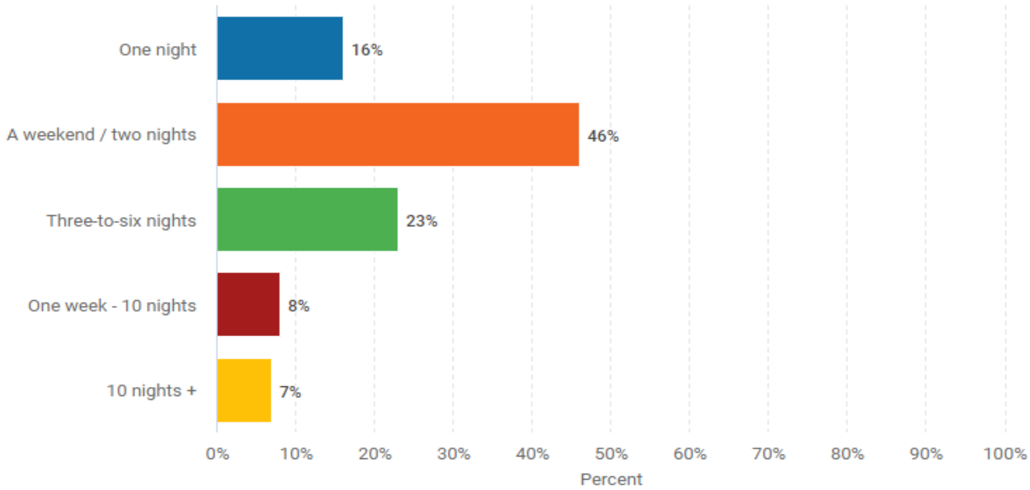


Source : Participant Survey Q10, n=194

2.49. Those respondents to the participant survey who stayed in Wales were most likely to stay for a weekend / two nights (46 per cent), followed by three to six nights (23 per cent), as indicated in Figure 17.

2.50. The average length of stay for visitors overall was 3.7 nights, which compares directly with the results of the latest Great Britain Tourism Survey (2021)[14].

Figure 17 - How many nights did you stay in Wales?



Source : Participant Survey Q11, n=185

2.51. In terms of how long visitors were likely to stay in different forms of accommodation, the longest average stay was in self-catering accommodation at 4.8 nights, followed by friends/family and "other." This is summarised in Table 5.

Table 5 – Duration of participant stay in Wales vs type of accommodation?

	One night	A weekend / two nights	Three-to-six nights	One week - 10 nights	10 nights +	Average stay (nights)
Camping	14 %	45 %	19 %	2 %	19 %	4.0
Hostel / bunkhouse	4 %	75 %	17 %	4 %	0 %	2.6
Self-catering	7 %	20 %	47 %	27 %	0 %	4.8
Hotel / B&B / Pub	20 %	44 %	22 %	13 %	0 %	3.2
With friends / family	0 %	43 %	43 %	0 %	14 %	4.2
Other (please specify):	3 %	48 %	29 %	6 %	13 %	4.1
Column Total	11 %	48 %	25 %	9 %	8 %	3.7

[14] Domestic GB Tourism Statistics (overnight trips)

Source : Participant Survey Q9 vs Q11, n=164

2.52. As might be expected, the average spend per survey respondent on accommodation was highest in serviced accommodation, as indicated in Table 6, at £85.44 per night, followed by self-catering at £70.33.

Table 6 – Accommodation spend per night vs type of accommodation

Accommodation	Ave spend (£)
Camping	21.55
Hostel / bunkhouse	30.42
Self-catering	70.33
Hotel / B&B / Pub	85.44
With friends / family	0.00
Other	19.24
Column Total	39.51

Source : Participant Survey Q9 vs Q10, n=194

2.53. Taking the length of stay and accommodation type into account, the largest average trip spend per person was in self-catering accommodation, at £339.94, followed by catered accommodation, at £275.32.

2.54. This implies an average trip accommodation spend across all durations and accommodation types of £146.36, as indicated in Table 7. This is lower than the average for tourists to Wales overall, which is reported in the Great Britain Tourism Survey as £198 per trip. This might be expected, given the extent of camping and bunkhouse use in the sector.

Table 7 – Average spends on overall trip, by type of accommodation

	Ave £ / night	Ave stay	Ave spend £
Camping	21.55	4.0	86.45
Hostel / bunkhouse	30.42	2.6	80.48
Self-catering	70.33	4.8	339.94
Hotel / B&B / Pub	85.44	3.2	275.32
With friends / family	0.00	4.2	0.00

Other (please specify):	19.24	4.1	79.76
Column Average	39.51	3.7	146.36

Source : Participant Survey Q8 vs Q9 vs Q10, n=164

2.55. As discussed earlier, the participant study demonstrated that of those visitors staying overnight, the most common stay options were hotels, B&B, and pubs, closely followed by camping. As can be seen in Figure 14 (above), the average spend per night, per person, is considerably larger for those staying in hotels and B&Bs (£51-£200) than camping (£20-£50), but little more than self-catering accommodation, where longer stays produced the largest average spend.

2.56. Although exploring the driver for choosing one type of accommodation over another is beyond the scope of this study, the prevalence of higher-cost accommodation choices could be linked with the most dominant average age of the visitor profile, which is between 49-65 years. It could be argued that this age group seeks higher levels of comfort and accessibility and are thus more inclined to pay higher prices to obtain those benefits.

2.57. Outdoor activity providers who were interviewed noted a particular challenge in securing higher quality accommodation options at scale, particularly in smaller communities, to accommodate a higher value and high spend clientele. As a result, providers often resort to collaborating with low-cost providers such as hostels and farm bunk houses which may limit the appeal of outdoor activities to clients who are less budget sensitive and may also limit the spend per visitor in the area.

Visitor Statistics from Businesses

2.58. Businesses were asked to indicate the number of visitors that they have received in the last 12 months, for which the median number was 400. However, as discussed below, there was a wide range of answers which reflects the diversity and breadth of tourism businesses in Wales.

2.59. Providers were most likely to cater for visitors from within the United Kingdom, outside Wales (63 per cent on average), followed by 25 per cent from Wales and seven per cent from Europe. Table 8 outlines where most visitors to the participating businesses came from.

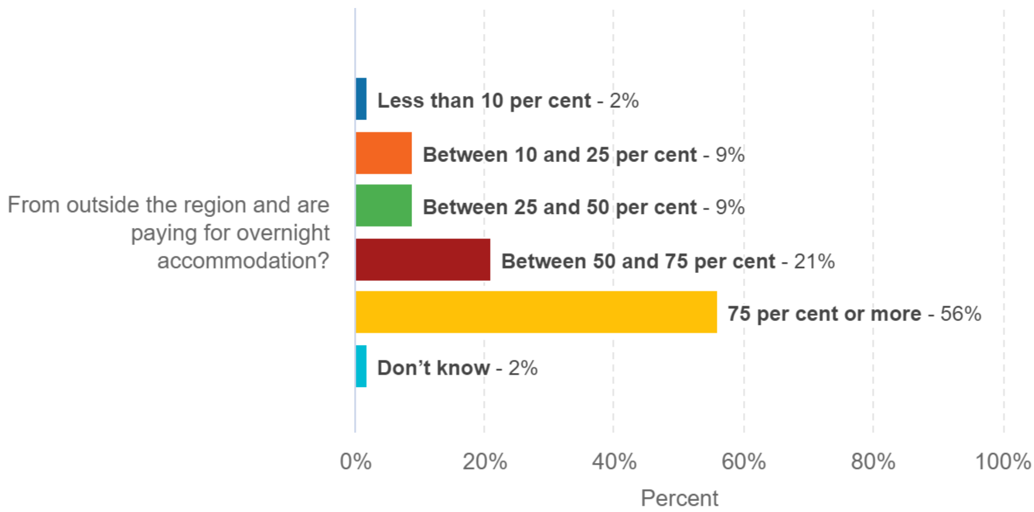
Table 8 – Visitor origins to Wales

Visiting from	<10%	10-25%	25-50%	50-75%	75%+
Wales	28%	38%	21%	3%	10%
UK (excl. Wales)	0	17%	10%	29%	45%
Europe (excl. UK)	88%	9%	0	3%	0
Outside Europe	97%	3%	0	0	0

Source: Business Survey Q7, N=42

2.60. Survey respondents were asked to indicate what proportion of their visitors are day-trippers or staying overnight. This information is outlined in Figure 28 below.

Figure 18 – From your experience, what proportion of your visitors are day-trippers, and from outside the region and paying for overnight accommodation?



Source: Business Survey Q10, n=43

2.61. The largest proportion of visitors to responding businesses elect to stay in overnight accommodation.

Number of visits

2.62. According to the Great Britain Visitor Survey, there were:

- 14.46m leisure day trips to Wales of more than three hours' duration, with a main activity of taking part in sports or outdoor leisure activities (11.6 per cent of the total).
- 4.0m full-day trips focused on sports and outdoor leisure (10.4 per cent of the total).

2.63. The survey also shows a total of 21.38m domestic visitor nights from holiday tourism, as shown in Table 9, although it does not distinguish the main activities of staying visitors. In addition, the UK Passenger Transport Survey suggests at total of 28,000 overseas visitors for holiday purposes, giving a total of 21.41m overnight visitor nights. Taking an average for the proportion of outdoor activity tourists from the short stay and day trip visitors gives us 11 per cent as a reasonable estimate for the proportion of staying visitors undertaking outdoor activities.

Table 9 – Great Britain Visitor Survey Number of Visits

GB Visitor Survey	All	OAT	OAT %
3+ Hours People (m)	125.1	14.5	11.6%
Day trips: People (m)	38.4	4.0	10.4%
Staying Nights (m)	21.4	2.35	11.0%
All	184.9	20.8	

Source: GBVS 2021/Miller Research

2.64. Multiplying daily spend from Table 9 by the visitor numbers above for each category gives the following figures, shown in Table 10, for overall value of the outdoor activity economy in terms of consumer spend. This comes to £1.6bn annually, representing the gross economic benefit to Wales.

Table 10 – Outdoor Activity Tourism Overall Spend (Gross Impact)

	3+ Hrs	Day Trips	Staying
Spend / day (Participant survey), £	31.45	64.23	160.13

Numbers (OAT from GBVS/ survey estimate)	14.50	4.00	5.56
Total spend (£m)	456.03	256.92	890.96
Grand total (£m)			1,603.91

Source: GBVS 2021, Participant Survey

Allowing for deadweight and displacement effects

2.65. To calculate the net benefits to Wales, Green Book guidance suggests that domestic contribution should be ignored as a displacement effect. That is, the money spent by Welsh visitors would likely be spent on other goods and services in Wales if they chose not to take part in outdoor activities.

2.66. Hence calculations of economic impact have been based on estimated numbers of visitors from outside Wales, using the day trips proxy added to those staying in Wales. This suggests a net investment from outdoor activity tourism of (£256.92m + £890.96m) = £1,147.88m.

2.67. Deadweight occurs when individuals would have visited Wales anyway, even if not undertaking outdoor activities. This has already been accounted for in the calculation of visitor numbers and so can be disregarded.

Applying multipliers

2.68. Using indicators developed for the 2014 study from primary data, the Welsh Input Output model and the Tourism Satellite Accounts, an overall output multiplier for the direct impact of OAT spend is 1.41, giving a total of £1,619m. Employment supported is calculated at one additional job per £55,000 of income – giving a direct employment impact of 29,428 jobs supported in the economy.

2.69. The direct spend by tourists has additional impact as the recipients of that spend recycle money in community, giving an overall multiplier of 1.59. This implies a total net economic impact of (1.59 x £1,148m) = £1,1825m. The total number of jobs supported (using the multiplier above) is 31,278, or 21 per cent of the total employment in tourism in Wales.

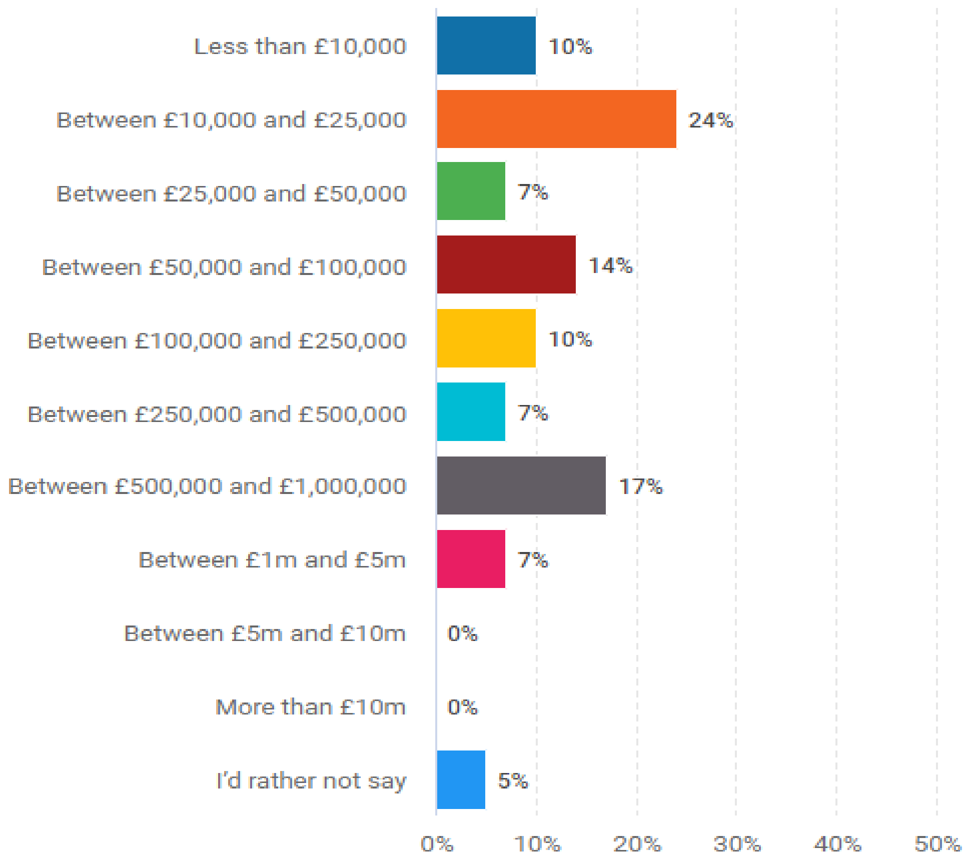
2.70. This should then be moderated for optimism bias – that is respondents over-estimating their spend when filling in the survey. We have estimated for this at five per cent, which is in line with UK Treasury guidance. This optimism figure will be adequately offset by the absence of a full 12-month dataset for visitor numbers and so can be safely ignored.

Economic impact of outdoor activity tourism businesses in Wales

Business Spend

2.71. Businesses were asked to estimate their annual turnover and there was a wide range of responses, as may be expected, from less than £10,000 per annum to between £1m and £5m per annum, as indicated in Figure 19.

Figure 19 – What is your annual turnover?

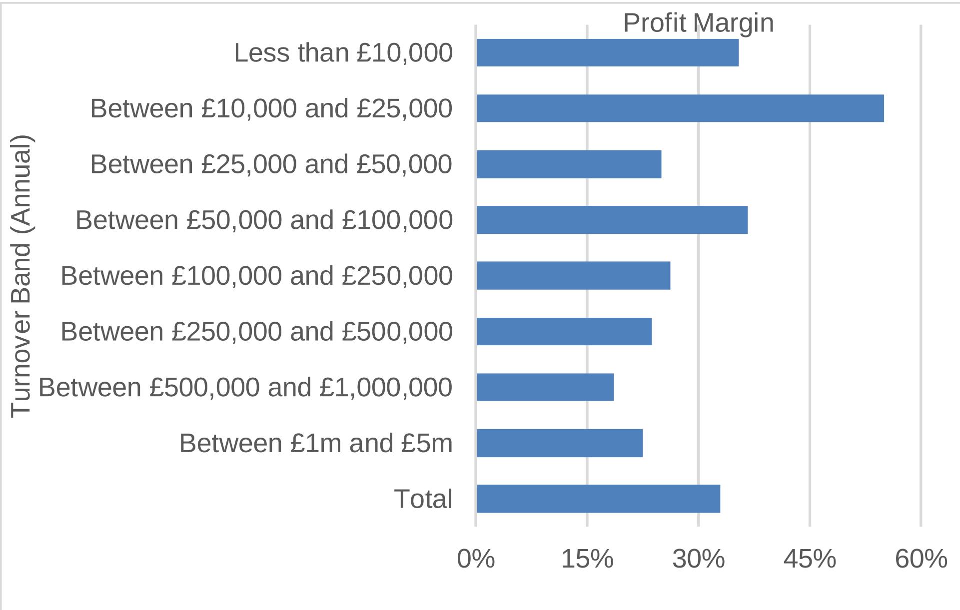


Source: Business Survey Q19, n=42

2.72. This might reflect the dichotomy between small, lifestyle businesses at one end of the scale, and large commercial or public sector organisations at the other. Overall, the average turnover was £420,813, although this would not represent the average business in Wales.

2.73. The average profit margin reported was 33 per cent across all respondents, as shown in Figure 20, although those turning over between £10,000 and £25,000 claimed to have the greatest margins – possibly because of low overheads/input costs.

Figure 20 – What would you say is your average profit margin? (Per cent)



Source: Business Survey Q19, n=42

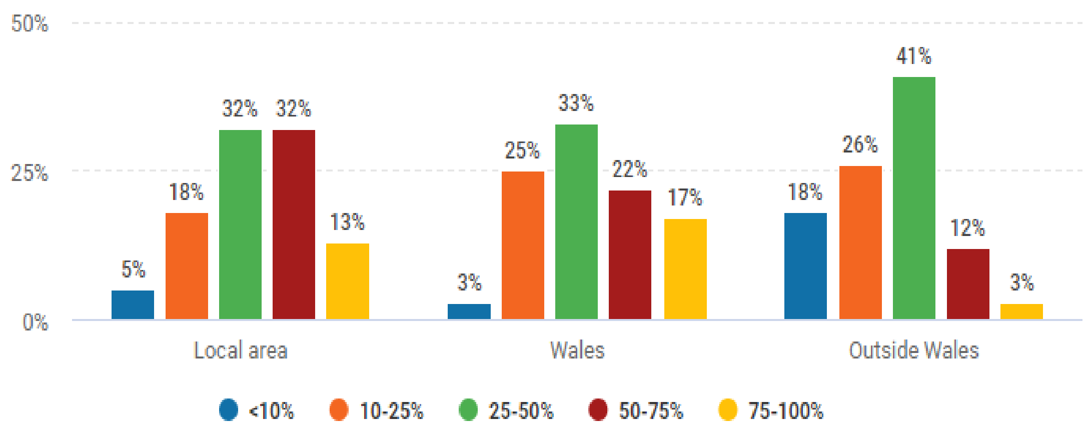
2.74. Data from the respondent survey shows that 10.7 per cent of visitors utilised activity provider organisations. This implies a total of 2.08m visitor days with providers.

2.75. On this basis an average spend of £70.22 (taken from the respondent survey) provides an income of £146m to the sector annually, summarised in Table 11.

2.76. This would generate an overall profit to the sector in the region of £48m, with input costs of £98m.

2.77. Businesses were asked to estimate the proportion of their annual business spend which goes to suppliers in the local area, within and outside of Wales. The average spend in the local area was 38 per cent, as shown in Figure 21. This would contribute direct investment of £37m to local communities where providers are based (often in marginal rural and coastal communities). 36.2m) giving a total of £73.4m spend in Wales on business costs. A further 25 per cent, or £24.5m was spent outside of Wales.

Figure 21 – What proportion of your annual business spend do you estimate is with suppliers in the local area, Wales, and outside Wales?



Source: Business Survey Q18, n=41

Table 11 – Overall income generated by businesses

Variable	Total
No. of visitor days using providers (m)	2.08
Annual spend on activities generates £m	146.06
Profit generated on activities (average margin of 33%) £m	48.2
Hence inputs costs £m (£146.06 -£48.2)	97.86
Spend in local area @38% £m	37.2
Spend elsewhere in Wales @37% £m	36.2
Total spend in Wales £m	73.4
Spend in UK outside Wales @25% £m	24.5

Source: Miller Research / Various

2.78. This implies that there is a high level of claimed retention of spend in Wales (75 per cent), providing a substantial contribution to the foundational economy.

2.79. From this spend, there will be a consequential further investment in local communities and across Wales, as that money is spent by suppliers. In addition, businesses had retained profits of £48.2m, which are likely to be spent in similar proportions in local communities, Wales and elsewhere.

Table 12 – Overall business impacts

Variable	In Community £m	Elsewhere In Wales £m	Elsewhere In UK £m	Total £m
Direct supplier impacts	37.19	36.21	24.46	97.86
Secondary supplier impacts	59.13	57.57	38.90	155.60
Retained profit	18.32	17.83	18.32	64.3
Secondary impact of profit spend	38.8	37.8	12.05	49.85
Total business impact	97.93	95.37	50.95	244.25

Source: Miller Research / Various

2.80. Using the 1.57 multiplier as before gives an overall economic impact figure generated by the outdoor activity tourism businesses of £244.25m annually, of which £98m accrues to local communities and £193m accrues to Wales. Economic impact in this case is additional money circulating in Welsh communities which would not be present in the absence of the outdoor activity sector.

Social Value of Outdoor Activities

2.81. Another way to measure the benefits of outdoor activity tourism is to consider social value. Social value refers to the positive impact that an activity, programme, or policy has on society and the wider community. It can include a range of non-financial benefits that contribute to the well-being of individuals and society, including social and environmental benefits, improved wellbeing, and social justice.

2.82. The social value of outdoor activity tourism was estimated through a range of different approaches, to reflect available approaches to social value measurement as cited in UK Treasury Green Book guidance[15]. These included:

- Contingent valuation (CV) approaches. These take two forms; willingness to pay and willingness to accept. In this case, three alternatives were used in the participant questionnaire:
  - Firstly, respondents were asked how much they would be prepared to pay for an annual licence fee to take part in their preferred outdoor activity.
  - Secondly, respondents were asked how much they would need to be paid to accept not taking part in their preferred outdoor activity for 12 months.
  - Thirdly, respondents were asked to value a day's activity against a range of alternatives such as a pair of trainers, a meal at the local pub or an overseas holiday. These were then assigned cash equivalent values to arrive at an overall social value.

2.83. It is recognised, however, that these CV approaches pose some challenges, and more emphasis has been placed recently on wellbeing valuation (using before and after surveys to model improvements in self-perception of wellbeing), or social return on investment-based models which look at the economic value of non-market products in terms of cost savings to society through improved

15 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/191522/Economic_valuation_with_stated_preference_techniques.pdf

physical or mental health, reduced crime or environmental improvements.

2.84. Hence the three CV-approach calculations have been appended to the report (Annex B), whilst the next section focuses on mental health benefits arising from outdoor activity, reflecting the pre-eminence of mental health and well-being as motivating factors for taking part in outdoor activity tourism.

Mental health impacts

2.85. An interesting characteristic of the survey results was the importance cited by respondents of mental health and sense of wellbeing as the prime motivation for taking part in outdoor activities.

2.86. Research shows that physical activity can be used both in the prevention and the treatment of depression and can also be deployed as a combination therapy with medication and/or psychological therapy[16]. In terms of prevention, strong evidence exists showing a 20-30 per cent reduction in depression in adults who participate in physical activity daily[17]. Exercise has potential advantages over antidepressants with fewer side effects, and perhaps less stigma attached to it as treatment modality in comparison to counselling or psychotherapy.

2.87. Limited evidence exists proving physical activity can reduce levels of anxiety and distress in people with mild symptoms by 20-30 per cent[18] and may also be helpful for treating or preventing clinical anxiety. Physical activity is available to all, has few costs attached, and is an empowering approach that can support self-management.

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[16] London School of Economics – Mental Health Problems cost UK economy at least £118 billion a year London School of Economics – Mental Health Problems cost UK economy at least £118 billion a year
[17] As above
[18] As above

2.88. The Welsh Government strategy from 2012[19] cites research which suggested that as long ago as 2007-8 the annual cost of mental ill health to Wales was £7.2bn, with an overall population per head spend of £238.79 on mental health clinical programmes in 2017-18[20].

2.89. Mental health and sense of wellbeing were extremely important reasons for taking part in outdoor activities to 63 per cent of survey respondents.

Table 13 – Value of outdoor tourism to mental health in Wales

Variable	Total	Wales-Based
Estimated unique visitors (m)	1.26	0.88
Proportion focused on mental health benefits (63%)	0.79	0.55
Assume 20% are kept out of the health service as a result	0.20	0.11
Total annual health value @£239 per head	£47.5m	£26.5m

Source: Miller Research / Various

2.90. Hence, if we assume that 20 per cent of those taking part in outdoor activities for mental health reasons are kept out of clinical intervention, then a conservative estimate (taking the overall population level spend, rather than cost per head of those *receiving* an intervention) of the potential saving to the NHS is £47.5m at UK level and £26.5m to Wales, as shown in Table 13 above.

Sensitivity Analysis

2.91. A social impact forecast model was devised by Sheffield Hallam University for Sport England[21]. This took a broad view of social impact

[19] Together for Mental Health Summary 2012
[20] NHS Expenditure Programme Budgets 2017-18
[21] https://sportengland-production-files.s3.eu-west-2.amazonaws.com/s3fs-public/2020-09/Social%20return%20on%20investment.pdf?5BgvLn09jwpTesBJ4BXhVfRhV4TYgm9E

and included estimates for the marginal impact of an increase in participation in sport and physical activity on a range of variables. These included physical and mental health, mental wellbeing, individual development, and social and community development (including social capital).

2.92. Taking the figures for the impacts of a 500K increase in the number of people participating in outdoor sport and applying the same multipliers to project the effects of a 10 per cent, 20 per cent and 30 per cent increase in participation in outdoor activity sport in Wales produces the results shown in Table 14.

Table 14 – Value of outdoor tourism to mental health in Wales

Projected Increase in Participation	10%	20%	30%
Participation Increase (m)	0.09	0.18	0.26
Physical and Mental Health (£m)	23.0	45.9	68.9
Mental Wellbeing (£m)	112.1	224.1	336.2
Individual Development (£m)	0.9	1.8	2.7
Social and Community Development (£m)	51.2	102.5	153.7
Total Impact (£m)	187.1	374.3	561.4

Source: Miller Research, based on Sheffield Hallam

2.93. This suggests that a 10 per cent increase in participation amongst Welsh residents would create a social impact of £187.1m, whilst a 30 per cent increase could deliver £561.4m across all areas of health, individual development, and social capital.

Effects on confidence

2.94. Respondents were then asked whether there are any ways that their adventure experience(s) in Wales have changed their confidence, adventurous spirit, or connection to nature, and if so, if they have noticed themselves doing anything differently as a result. Of the 273 respondents to this question, the vast majority of participants value outdoor activities as an integral part of their life, which has helped with mental health and work-life balance. This builds upon the findings highlighted in Question 5. Other changes mentioned included participants learning more about their local area and history, having gained confidence and resilience through adventurous activities such as climbing and caving.

2.95. In addition, participants shared that they feel a greater appreciation for nature and the environment and are more environmentally conscious in their daily life. Some participants also made new friends and developed skills such as navigation and first aid.

2.96. However, some participants shared that they get irritated with the increased tourism in their area due to outdoor activities.

2.97. The following word cloud, Figure 22, demonstrates the frequency of specific terms mentioned in response to this question.

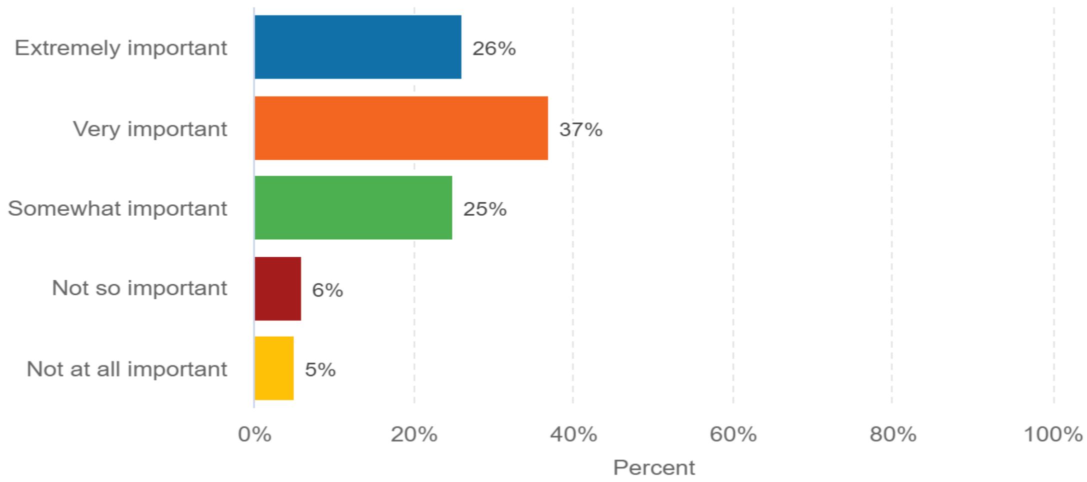
Figure 22 – Are there any ways that your adventure experience(s) in Wales have changed your confidence, adventurous spirit, or connection to nature, and if so, what have you noticed yourself doing differently as a result?

Source : Participant Survey Q20, n=273

2.98. In terms of how important it is considered for providers to have a strong sense of mission and social purpose, 63 per cent of respondents believed this was extremely or very important, as shown in Figure 23. Reasons listed for this included having respect for the environment, links to community, and personal values embedded in a company.

2.99. However, cost and capability came first for many individuals when considering which adventure business, they would book.

Figure 23 – If you are booking adventures through a provider, how important is it to you that they have a strong sense of mission and social purpose?



Source : Participant Survey Q21, n= 432

External Business Influences

2.100. Businesses were asked about the impact that the Covid-19 pandemic had on their business over the past three years (or as long as the company has been established for, if less than 3 years).

2.101. Several negative factors were listed, with the most popular response outlining that the effects of the Covid-19 pandemic were devastating as there was no business at all, and many businesses almost folded during this time. Other respondents were unable to operate at all during this time and this will take a few years to recover from.

2.102. Six respondents mentioned how business had been unpredictable during this time, with sporadic tourism, reduced activity, a general loss of customers and a big loss of revenue.

2.103. Three respondents highlighted high staff turnover, with lots of staff moving into other sectors, as well as concerns about their staff's mental health. Three further respondents mentioned that there was considerable impact in terms of new regulations, cleaning, PPE gear, and generally how businesses had to adapt during Covid-19.

2.104. However, some positive outcomes were highlighted for the sector because of the Covid-19 pandemic. Six respondents said that their businesses quickly “bounced back” and resulted in their best trading years to date in 2021 and 2022. Four respondents linked business success with participants having found a new appreciation for the outdoors (linking to demands in the years following Covid19).

2.105. Furthermore, two respondents utilised their time during the quieter period during the Covid-19 lockdowns to streamline their business, think about business direction, and embrace new technology and ways of working. As a result, they feel that their businesses have developed into something “new and fresh.”

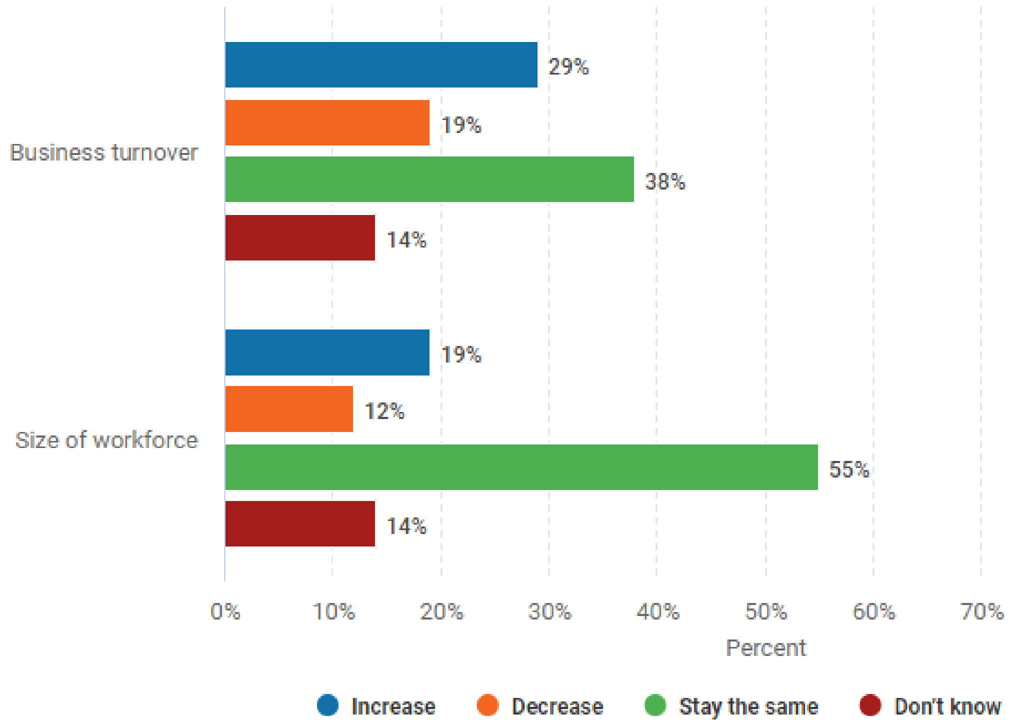
2.106. Another external factor asked in the business survey related to the impact of the current ‘Cost of Living Crisis' on businesses, with 83 per cent of businesses indicating that there is an impact.

2.107. Factors those businesses listed in relation to the impact that the Cost-of-Living crisis is having on their business included reduced bookings and cancellations, including bookings from school groups due to a reduction in available school resources. In addition, increased transport and accommodation costs for visitors is noticeable on the number of visitors to outdoor activities. The rising costs of fuel, staff and equipment were also listed, with Brexit also listed as a factor in the increased costs of purchasing equipment.

2.108. Outdoor activity providers who were interviewed noted several of the same issues with regards to the Covid-19 pandemic including an initial shutdown which affected the demand for activities which led to the closure of some providers with longstanding financial issues. However, the sector had seen a strong rebound growth more recently which whilst welcomed, was found by providers to be challenging to manage given issues with shortages of suitably qualified staff and large influxes of visitors into small areas which struggled to cope with the excess demand, with particular regard to food and accommodation venues. Whilst managing the fluctuating demand for outdoor adventure activity in Wales has been a challenge for businesses, it is hoped that demand will normalise in 2023 and businesses will be able to better plan for expected demand and manage the influx of visitors more sustainably, with a number of businesses already seeking out new sites and greater collaboration with local stakeholders in order to manage the peaks and troughs of demand across the year.

2.109. Businesses were then asked how they anticipate their business turnover, and the size of their workforce will change in the next three years. As indicated in Figure 24, 29 per cent of businesses thought their turnover would increase, and 19 per cent thought the size of their workforce would increase, but the majority of businesses believed that their turnover and size of workforce would stay the same.

Figure 24 – In the next three years how do you anticipate your business turnover and workforce to change?



Source: Business Survey Q22, n=43

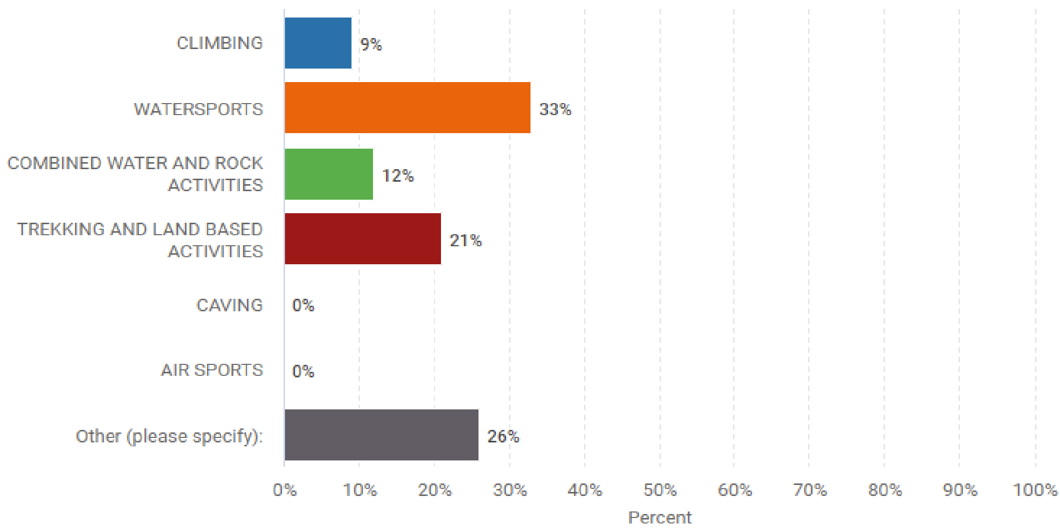
2.110. Eight-five per cent of businesses responding felt there were currently barriers to potential growth within the outdoor activity sector. The reasons for this included staffing and costs in the face of reduced customer demand, maintaining business through the off-season, increased competition, the need for investment and funding, the lack of access to water and land in places, lack of facilities, shortage of reasonable cost accommodation and possible visitor levy.

2.111. Outdoor adventure activity providers highlighted a number of barriers to growth during interviews, with a particular emphasis on the challenge of hiring sufficient, suitably qualified staff alongside, managing business costs and rates with the current inflationary pressures and cost of living ‘crisis’, managing demand sustainably across the calendar year and engaging with local stakeholders such as schools and other repeat clients in order to do so.

Business Activities

2.112. Businesses that participated in the survey outlined which outdoor activities contribute most towards their business activities and revenue. The activities were categorised into climbing, water sports, water, and rock activities, trekking and land-based activities, caving, and air sports. Figure 25 illustrates the extent to which the categorised activities contribute to the businesses.

Figure 25 – What outdoor activities does your organisation / business provide?



Source: Business Survey Q2, n=43

2.113. From the graph it is apparent that caving-related activities and air sports are the least common activities provided by businesses in Wales that participated in the survey. The activities with the most traction, on the other hand, are trekking and land-based activities, and water sports activities. The activities were also selected as being the most commercially important for businesses.

Business in Wales

2.114. Participating businesses were asked to share their opinions on the advantages and disadvantages of having a tourism-related business in Wales. These are displayed in Table 15 and can be used as starting points for recommendations around tourism-industry developments and improvements.

Table 15 – Advantages and disadvantages businesses listed for having their business in Wales

Advantages	Disadvantages
Variety of landscapes, scenery, geography, and climates	Not enough support and encouragement to work in the sector
Fantastic and accessible location	Accessibility issues for vehicles
Language, culture, and history	Political boundaries – competition in England and Brexit difficulties
Range of rivers, dams, and lakes	Saturated market offering similar services
Wonderful and remote views and terrain	Lack of collaborative thinking
Abundance of wildlife and nature	Poor customer service, unfriendliness
Close to large population centres	Distance from large populations or places with high population density
Good national and regional networks	Poor travel networks, bad state of infrastructure and logical issues
Good to access activities, resources, nature, and open spaces	Lack of understanding of tourism industry needs in Wales

Outstanding natural beauty	Seasonality, poor and unpredictable weather

Source: Business Survey Q4, n=40

3. Conclusions and Recommendations

Conclusions

3.1. This study shows that there has been strong growth in the outdoor activity tourism sector since the previous study in 2014. The GBVS estimates a 75 per cent growth in the number of people participating in adventure sports and water sports activities between 2011 and 2019 and this is reflected in the results of the study.

3.2. More recently, the Tourism sector has bounced back from a steep decline in demand during the Covid-19 pandemic, although has still yet to return to its pre-pandemic peak.[22] This represented a strong, but welcomed, challenge to outdoor activity providers who have had to flex their offer to meet this unexpectedly quick rebound of pent up demand, whilst working within ongoing constraints of shortages of suitably qualified staff and limited local facilities to accommodate large influxes of visitors in popular hotspots across Wales.

3.3. Strategies for managing this large fluctuation in demand have included working more closely with local accommodation and facilities providers to scale up their offer, seeking out alternative less attended sites to run outdoor activities and working more closely with other outdoor activity providers. Whilst providers felt that they were able to manage this fluctuation they welcome a more normalised pattern of demand in 2023 and would like to see greater data available on the nature and level of demand to support with business planning and wider strategic support and coordination for the sector as a whole.

[22] Tourism Barometer: February wave 2023 | GOV.WALES

3.4. Further, this study has shown that visitors engaging in outdoor activities spend more on average per person than other visitors to Wales, especially when engaging with outdoor activity providers.

3.5. Critically, the motivations for engaging in outdoor activities appear to have shifted dramatically from a focus on predominately male, adrenalin-driven sports to a more gender-balanced sector with a primary focus on health and wellbeing, and mental health in particular.

3.6. In addition, this study demonstrates the ability of social media channels to engage a wider demographic of people into pursuing outdoor activities in Wales, including younger people, people with less experience in outdoor activities and people from Black and Minority Ethnic backgrounds. Whilst outdoor activity providers welcomed the ability for social media to reach new markets it was felt that any promotion would need to be conducted strategically to ensure that it does not induce excess demand in areas ill equipped to cope with such demand and that there is a strong health and safety message for beginners to outdoor activity.

Recommendations

3.7. The value of outdoor activity providers to supporting mental and physical health should be more widely recognised, with scope for more engagement in social prescribing funded through health budgets.

3.8. Outdoor activity providers would welcome improved data gathering to improve their understanding of the level and nature of current and projected demand to support with business planning and wider sectoral coordination. In addition, businesses would like to see greater research on the economic and social value of outdoor activity tourism in Wales to build the case for greater investment and support.

3.9. Given the strong growth in popularity of outdoor activity tourism in Wales and the consequent pressure on key sites, there is a role to encourage visitors to engage with outdoor activity providers to both leverage value and spend. Providers would also welcome more strategic coordination of outdoor activity promotion and delivery, both locally and nationally. It was felt that Visit Wales could promote a more diverse range of activity sites across Wales to avoid certain locations becoming ‘honey traps’ and overrun with visitors that local facilities cannot accommodate.

3.10. Where locations are experiencing excess demand, there would be an opportunity for greater coordination of local outdoor activity providers to explore new sites which may be less busy and greater collaboration with local facilities and stakeholders to manage current and projected demand.

3.11. Providers felt that there was currently a gap in the availability of high-quality accommodation which could be scaled up at short notice to attract high value customers. Through leveraging greater per visitor local spend it was felt that the value of outdoor activity tourism to the local economy could be maximised whilst still managing demand in a way which is more sustainable.

3.12. Through this research, social media has emerged as a key tool to engage new markets in outdoor activity tourism including younger people, people with less experience and people from Black and Ethnic Minority Backgrounds. However, it was felt that the social media messaging needs to be tailored to ensure that beginners understand the level of risk associated with outdoor adventure activities and the importance of experts and guides to support activities being conducted safely.

3.13. Providers recognised the opportunity to expand current activity with schools to promote outdoor learning as part of the new Curriculum for Wales[23] to provide wider social and community benefits, whilst managing demand in a way which could be more consistent and evenly dispersed throughout the year.

[23] Curriculum for Wales: overview | GOV.WALES

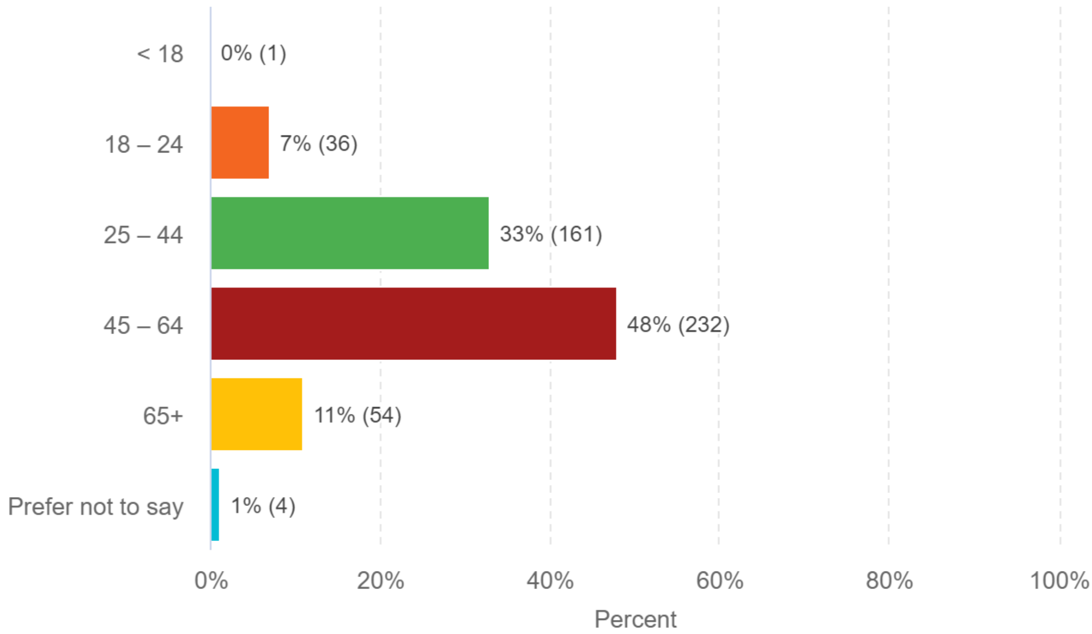
3.14. Providers were keenly aware of the need to address staff shortages, following the negative impact of the Covid-19 pandemic on qualified staff supply in the sector. Providers would welcome the provision of new routes for young people into pursuing careers in outdoor activity tourism as well as strengthening existing channels through for example paying Apprentices a Living Wage. One provider offered subsidised training courses to local people to build interest in the outdoor environment and build new routes for people to be engaged into working in the sector.

4. Annexes

Annex A – Participant Profiling

4.1. The most popular age category was the 45-64 category, which represented 48 per cent of respondents, as indicated in Figure 28.

Figure 26 – Please specify your age range



Source : Participant Survey Q22, n=488

4.2. Of the respondents who specified their gender, 55 per cent of respondents defined themselves as female, and 40 per cent defined themselves as male.

4.3. Table 16 shows the proportion of visitors who fall within different age ranges as indicated by businesses who completed the business survey. This indicates that provision for those aged 25-44 was most popular within the sample, followed by the 45-65 age band.

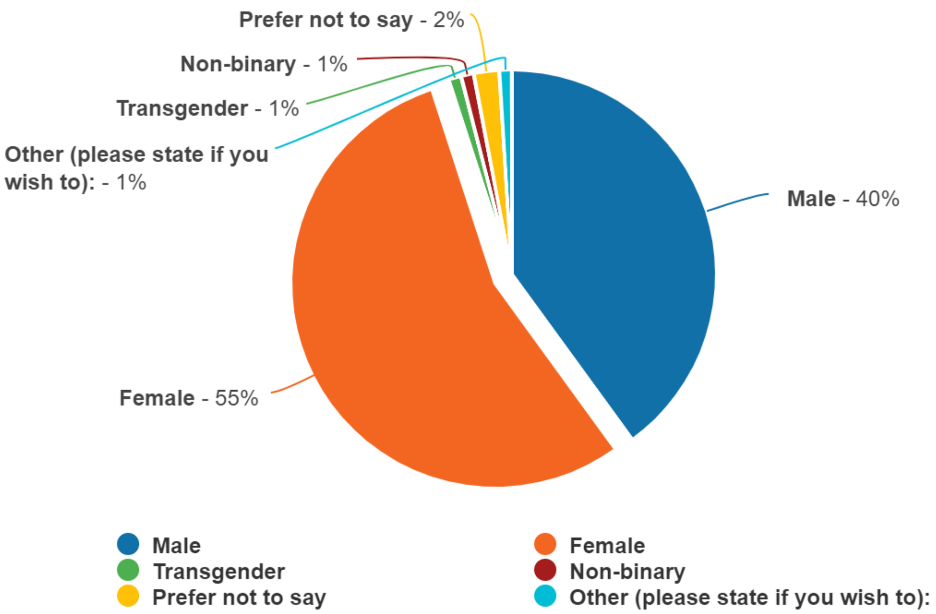
Table 16 – Rough proportion of visitors split by age ranges

Age Band	<10	10-25	25-50	50-75	75+	Average %
Pre-school age (<4yrs)	95%	5%	0%	0%	0 per cent	6
Primary school age (between 4 and 11)	56	23	3	9	9	21
Secondary school age (between 11 and 16)	30	49	18	3	0	19
16-25	33	36	25	0	6	23
26-44	20	31	33	13	3	30
45-65	31	26	31	13	0	26
65+	70	22	8	0	0	10

Source: Business Survey Q8, n=43

4.4. The majority of survey respondents were female (55 per cent), with 40 per cent male.

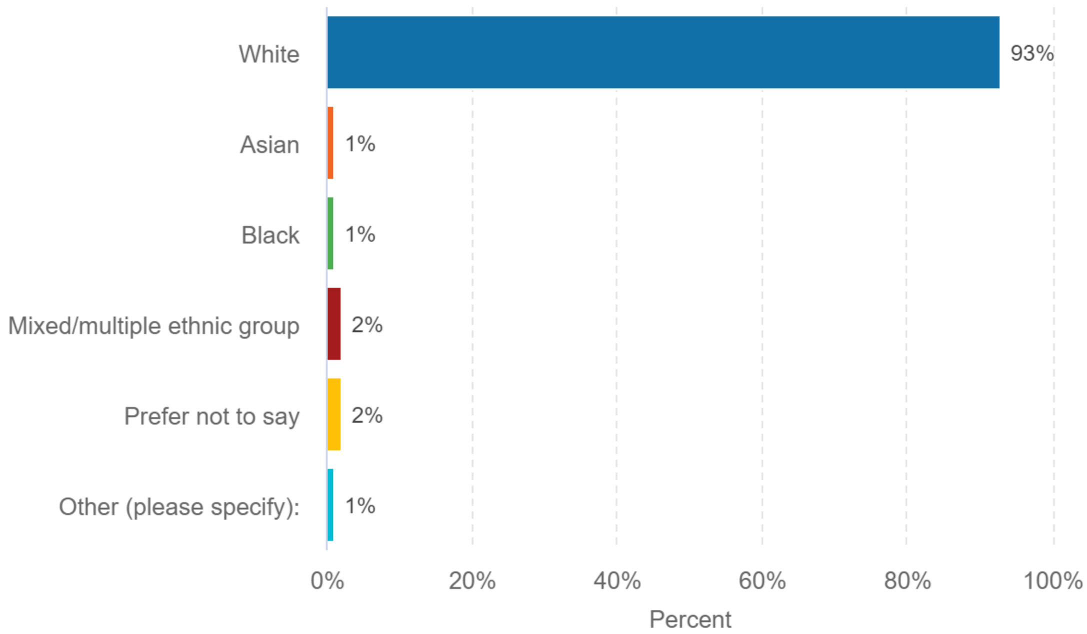
Figure 27 – How do you define your gender?



Source : Participant Survey Q23, n=489

4.5. Figure 28 below indicates that when asked to specify their ethnicity, 93 per cent of participants indicated that their ethnic group was White.

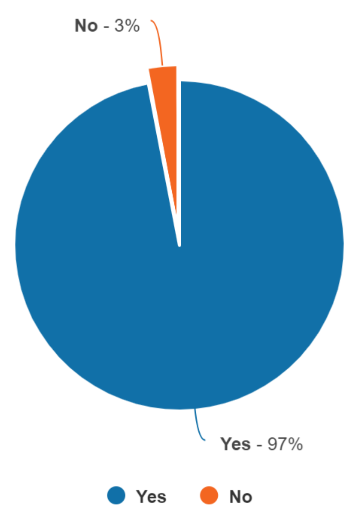
Figure 28 – Please specify your ethnicity



Source: Participant Survey Q24, n=489

4.6. Out of the scope of the study were any follow up questions about other countries of residence, however 93 per cent of participants indicated that they were a UK resident, as shown in Figure 29.

Figure 29 – Are you a UK resident?



Source : Participant Survey Q25, n=488

Annex B – Alternative Approaches to Social Value Measurement

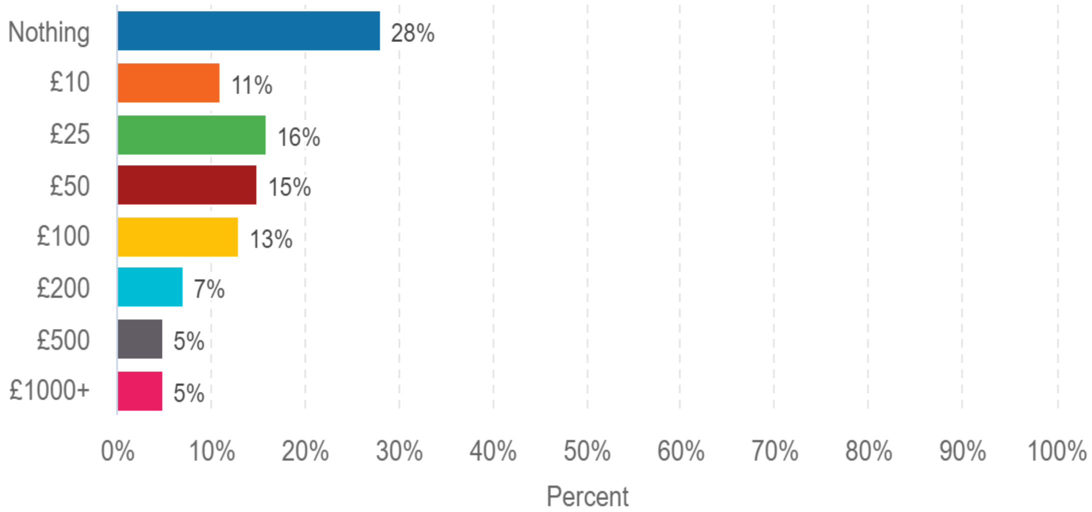
4.7. Three research approaches were tried to assess social value from different perspectives and the results of these are laid out below.

Option 1

4.8. Half of respondents were asked how much they would be prepared to pay in the form of a license fee to take part in their favoured activity.

4.9. Of these participants, Figure 30 demonstrates that 28 per cent were not prepared to pay to take part in their activity, whilst 5 per cent said that they would pay more than £1,000. On average, the hypothetical "fee" that participants would be prepared to pay was £115.31.

Figure 30 – Imagine you had to pay an annual licence fee for taking part in the activity you undertake most frequently, how much would you be prepared to pay?



Source : Participant Survey Q17, n=223

4.10. Hence, to calculate the overall social value, shown in Table 17, we need to understand the estimated number of unique visitors to Wales and multiply this by the average "fee" figure above.

Table 17 – Social value calculated from Option 1 approach

Variable	Total	Wales-Based
Total OAT Visits / year (m)	20.8	14.5
Average visit frequency	16.5	16.5

Estimated unique visitors (m)	1.26	0.88
Average social value per person	£115.31	115.31
Total annual social value	£145m	£101m

Source: GBVS / Miller Research

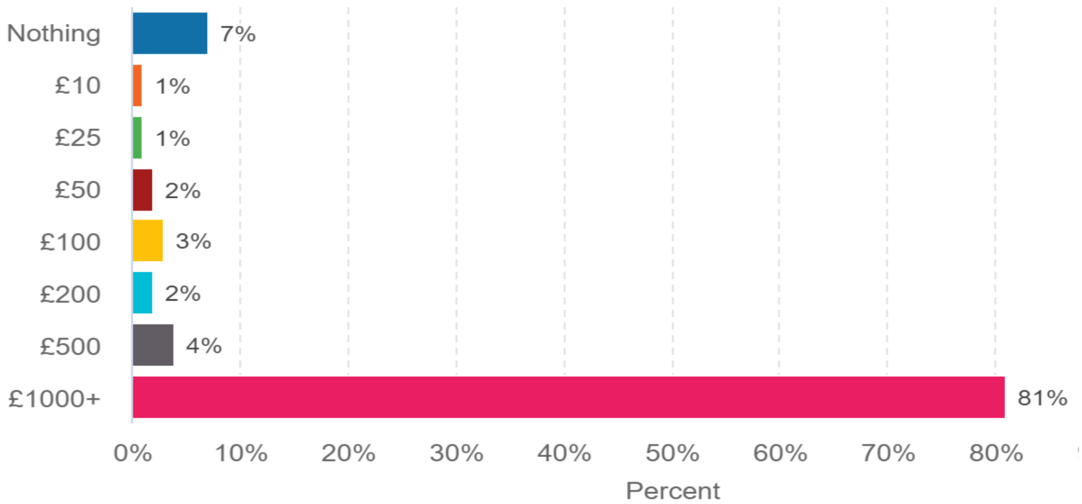
4.11. This gives an initial estimate for social value of £145m per annum across all visitors, and £101m for Welsh residents.

Option 2

4.12. The other half of respondents were asked how much they would have to be paid to not participate in their preferred activity for a year.

4.13. Whilst 7 per cent said that they would not have to be paid to give up taking part in their chosen activity, shown in Figure 31, 81 per cent of participants indicated they would have to be paid more than £1000.

Figure 31 – Imagine we asked you to not take part in your preferred activity for a year. How much would you need to be paid to not take part?



Source : Participant Survey Q18, n=258

4.14. The average value assigned came to £838.35 per person[24], as shown in Table 18. This provides an excellent illustration of the so called

[24] Treating “£1000+” as £1000 – hence maintaining prudence.

"endowment effect," where people value what they have much higher than what they would be prepared to pay to replace it.

Table 18 – Social value calculated from Option 2 approach

Variable	Total	Wales-Based
Total OAT Visits / year (m)	33.3	14.5
Average visit frequency	16.5	16.5
Estimated unique visitors (m)	2.02	0.88
Average social value per person	£838.35	838.35
Total annual social value	£1,693m	£738m

Source: GBVS / Miller Research

4.15. This would not be considered a reliable measure, but it is instructive in terms of the value placed by individuals on their right to access outdoor activities.

4.16. When asked what they valued in accessing outdoor activities, there was a wide range of comments, of which some of the keywords are captured in Figure 32 below:

Figure 32 – What factors do you value with regard to outdoor activity tourism?

Source : Participant Survey Q18, n=258.

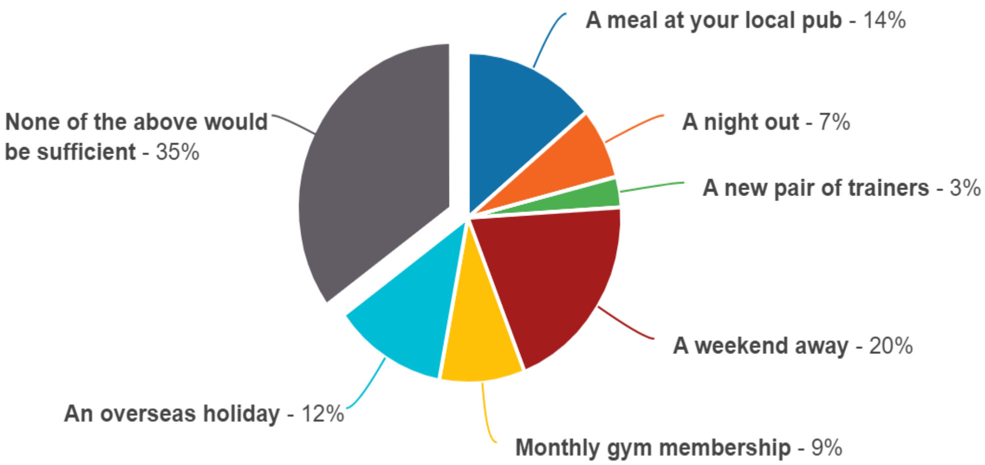
Option 3

4.17. The question was then rephrased to ask respondents how they would value a day's activity in terms of an exchange for one of the following options:

- A meal at your local pub
- A night out
- A new pair of trainers
- A weekend away
- Monthly gym membership
- An overseas holiday

4.59. Respondents were most likely to place a higher value on their activity than any of the proposed alternatives (35 per cent of respondents), as shown in Figure 33. However, there was a wide spread of alternatives, with "a weekend away" attracting the largest group of respondents who chose a non-cash value (20 per cent).

Figure 33 – To put the question another way, how would you value a day's activity in terms of an exchange for one of the following:



Source : Participant Survey Q19, n=477

4.60. Respondents voiced a range of opinions including the following quotes:

- “Those options I would say don’t offer the benefits time spent outdoors in North Wales brings.”
- “They’re too tangible; getting out in the mountains for example, offers so much more than just a summit.”
- “The mental and physical benefits go beyond this and to do it locally is an extra bonus.”

4.61. To use this information to estimate social value, monetary values were assigned to each alternative, and demonstrated in Table 19. The answer of “none of the above” was excluded from this calculation.

Table 19 – Proxy values assigned to non-cash alternatives offered to participants

Alternatives	Proportion of respondents %	Proxy Value £
A meal at your local pub	13.6	25
A night out	7.1	50
A new pair of trainers	3.1	100
A weekend away	20.1	250
Monthly gym membership	9.2	40
An overseas holiday	12.0	500
None of the above sufficient	34.8	500
Average Social Value		297.87

Source: Participant Survey Q19, n=477 / Miller Research

4.62. The average monetary value assigned was used as a multiplier, as before. This gives a total social value of £602m or £262m to Wales and is summarised in Table 20.

Table 20 – Social value calculated from proxy values assigned to non-cash alternatives

Variable	Total	Wales-Based
Total OAT Visits / year (m)	33.3	14.5

Average visit frequency	16.5	16.5
Estimated unique visitors (m)	2.02	0.88
Average social value per person, £	297.87	297.87
Total annual social value, £m	602	262

Source: Miller Research

4.63. Clearly there is a significant variation in social value attributable to outdoor activity tourism, depending on the method used to estimate it. All three approaches are valid but vary in their philosophical standpoint.

4.64. The overall average social impact value for Wales was £367m annually, rising to £843m at UK level, shown in Table 21 below.

Table 21 – Social value comparison across three options

Variable	Social value / person, £	Total £m	Wales-Based £m
Option 1	115.31	233	101
Option 2	838.35	1693	738
Option 3	297.87	602	262
Average annual social value	417.18	843	367

Source: Miller Research

Annex C – Outdoor Activity Tourism Impact Study – Participants

Introduction	
By completing this short survey, you will be entered into our prize draw for the chance to win a £100 voucher to be spent on outdoor activities or goods in Wales. Miller Research has been commissioned to undertake an Outdoor Activity Tourism Impact Study. This project is funded by Welsh Government's Coastal Capacity Building Challenge Fund, administered by WCVA. The purpose of the study is to understand the economic impact of the adventure activity sector and consider the social value of these activities in Wales. The following survey will ask for details about an outdoor activity you undertook in Wales over the past year, the nature of your visit and any money you spent directly or indirectly because of undertaking the activity. Please note that the data we collect will not be used for any other purpose than for the economic and social impact of the outdoor activity tourism in Wales. We will not pass the data on to any third parties, and we will destroy your details once the research is complete. We conduct all our research in accordance with GDPR and in line with the Market Research Society guidelines. If you would like more information about how we will use the data you provide, please email hannah@miller-research.co.uk. If you would like to view and complete the survey in Welsh, then please use the following link: Thank you.	
1.	* Have you undertaken an outdoor adventure activity in Wales in the last year? An outdoor adventure activity includes anything from climbing, mountaineering, water sports and airsports to a ropes course or zipwire. *The survey does not cover activities such as angling, shooting, or other blood sports. The activity could have been organised as part of a group or undertaken independently.
• Yes • No	
2.	Which of the following outdoor adventure activities have you undertaken in Wales in the last year and how frequently? (Matrix: Never, Once, occasionally (once or twice a year), Once every few months, regularly (once or twice a month), Frequently (more than twice a month)

•	Climbing – abseiling, bouldering, rock climbing, ropes courses
•	Watersports – board surfing, canoeing, diving, improvised rafting, kayaking (including river, sea, surf kayaking and sit-on-top kayaking), sailing, kite surfing, stand up paddleboarding, white water rafting, wild swimming, windsurfing
•	Combined water and rock activities – canyoning, coasteering, gorge walking, sea level traversing
•	Trekking and land-based activities bushcraft, coastal walking* (excluding urban areas), fell running, hill walking, horse trekking, lowland and moorland walking, mountaineering, mountain biking, off road cycling, orienteering, road cycling (excluding urban areas), scrambling, skiing, snow boarding
•	Caving – caving, potholing, mine exploration
•	Airsports – paragliding
•	Other (please specify)
3.	Thinking about the activity that you have undertaken most frequently in the last year, where do you typically undertake this outdoor activity in Wales?
	• South East Wales (Blaenau Gwent, Bridgend, Caerphilly, Cardiff, Merthyr Tydfil, Monmouthshire, Newport, Torfaen, Rhondda Cynon Taf, the Vale of Glamorgan) • South West Wales (Carmarthenshire, Neath Port Talbot, Pembrokeshire, Swansea) • Mid Wales (Ceredigion, Powys – includes the Brecon Beacons) • North Wales (Conwy, Denbighshire, Flintshire, Gwynedd, Wrexham, the Isle of Anglesey – includes Snowdonia) • All over Wales
4.	Which of the following would you say best reflects the activity you have carried out most frequently in the past year?
	• Independently arranged (own equipment) • Independently arranged (rented equipment) • Part of group/club (please specify) • Outdoor activity provider based in Wales (please specify) • Outdoor activity provider outside Wales (please specify) • Other (please specify) • Please specify the group / club, or activity provider.

5.	We would you like you to rate the following in terms of your reasons for taking part in outdoor adventure sports, and to tell us what you think is your main reason is for taking part:

Not at all important Not very important Neutral Important Very important Main reason

- Physical health and fitness benefits
- Mental health and sense of wellbeing
- Self-confidence and self-esteem
- Adrenaline / excitement
- Sense of belonging / camaraderie / purpose
- Getting closer to nature

6.	Are there any other benefits of taking part in outdoor adventure sports that are not mentioned above?

Free text box

Continuing to think of the outdoor activity you undertake most frequently in Wales.

7.	Thinking about the last time you took part in the activity in Wales, which of the following best describes your visit?

- The outdoor activity was part of a wider holiday/visit
- I travelled specifically for the outdoor activity
- I can access the activity straight from home
- Other, please specify

8.	Continuing to think about the last time you took part in the activity in Wales, how long did you spend undertaking the activity?

- Part of a day
- Most of a day
- All day
- A weekend/two days
- Three-to-six days
- A week or longer

9.	Approximately how much did you spend per person, per day, undertaking the activity itself? Approximately how much did you spend per person, per day, on other things during your visit? (i.e.: souvenirs, food and drink, travel) excluding accommodation.
• Nothing • £1-10 • £11-20 • £21-50 • £51-100 • £101-250 • £251-500 • £501+	
10.	As part of your trip to undertake the outdoor activity, where did you stay?
• At home, I live within travelling distance in Wales • At home, I live within travelling distance in England • Camping • Self-catering • B&B • Hotel/hostel/pub • With friends/family • Other (please specify)	
Staying in Wales	
11.	How much did you spend on your accommodation only in Wales, per person, per night?
• Nothing • Less than £20 • £21-50 • £51-80 • £81-100 • £101-£200 • £200+	
12.	How many nights did you stay in Wales?

• One night • A weekend / two nights • Three to six nights • One week – 10 nights • 10 nights +
13. Would you have visited Wales anyway if you weren't taking part in an outdoor activity?
• Yes • No • Don't know
14. Will you come again to Wales to undertake this activity or a similar outdoor activity?
• Yes • Maybe • No • If not, why not?
15. Would you recommend Wales as an activity destination to a friend or relative?
• Yes • Maybe • No • If not, why not?
16. Please describe the best part of your experience of outdoor activities in Wales.
Free text box
17. Is there anything about your experience of outdoor activities in Wales that could have been improved?
Free text box
Social Value of Outdoor Activities
We are interested in understanding the social value of outdoor activity sports and the questions below are intended to understand your attitudes towards outdoor adventure sport.

18.	(A) We would like to understand the value to individuals of taking part in outdoor activities. Imagine you had to pay an annual licence fee in addition to existing costs for taking part in the activity mentioned above, how much would you be prepared to pay? (There is no suggestion of bringing in fees, the question is purely to understand the value to you).
• Nothing • £10 • £25 • £50 • £100 • £200 • £500 • £1000+	
19.	(18B) We would like to understand the value to individuals of taking part in outdoor activities. Imagine we asked you to not take part in your preferred activity for a year. How much would you need to be paid to not take part?
• Nothing • £10 • £25 • £50 • £100 • £200 • £500 • £1000+	
20.	To put the question another way, how would you value a day's activity in terms of an exchange for the following:
• A meal at your local pub • A night out • A new pair of trainers • A weekend away • Monthly gym membership • An overseas holiday • None of the above would be sufficient	

21. Are there any ways that your adventure experience(s) in Wales have changed your confidence, adventurous spirit, or connection to nature and if so, what have you noticed yourself doing differently as a result

Free text box

22. If you are booking adventures through a provider, how important is it to you that they have a strong sense of mission and social purpose?

- Extremely important
- Very important
- Somewhat important
- Not so important
- Not at all important

Why do you say that?

About you

Would you mind telling us a little about yourself? This information will not be passed onto any other organisation and will be used by Miller Research specifically for this research project.

23. Please specify your age range

- < 18
- 18 – 24
- 25 – 44
- 45 – 64
- 65+
- Prefer not to say

24. How do you define your gender?

- Male
- Female
- Transgender
- Non-binary
- Prefer not to say
- Other (please state if you wish to)

25. Please specify your ethnicity

• White • Asian • Black • Mixed/multiple ethnic group • Prefer not to say • Other (please specify)	
26.	Are you a UK resident?
• Yes • No	
27.	Please let us know the first half of your postcode (for mapping purposes).
Free text box	
28.	If you would like to be entered into the prize draw for a £100 voucher to be spent on outdoor activities or goods, please provide your email address. The voucher can be redeemed at any listed adventure provider supplied by Pembrokeshire Outdoor Charter, South Wales Activities Providers or Snowdonia Active. Pembrokeshire Coastal Forum will cover the cost of goods or activities up to £100 spent with any listed adventure provider.
Free text box	

Annex D – Outdoor Activity Tourism Impact Study – Tourism Providers

Miller Research has been commissioned to undertake a detailed economic analysis of the impact and value of the outdoor activity tourism sector within Wales (in terms of financial value and employment as well as social value, such as skills development, volunteering, environmental benefit etc). This project is funded by Welsh Government's Coastal Capacity Building Challenge Fund, administered by WCVA, and supported by WATO. With the help and support of the sector, we believe this research will offer a robust evidence base that demonstrates the economic and social importance and impact of the sector to Welsh Government and other stakeholders. This has the potential to justify and influence future support for outdoor activity tourism and help your sector in achieving its potential. Of course, the quality of our research will be heavily dependent on the level of sector engagement we achieve. We would therefore really appreciate your help in contributing to the evidence base through completing the following survey. We would also really appreciate your help in sharing our participant survey with your customers and others who may have participated in outdoor activity tourism through any means possible (email, website, social media platforms). The links to the English and Welsh medium versions of the survey are provided below: Please note that the data we collect will not be used for any other purpose than for the economic and social impact of the outdoor activity tourism in Wales. We will not pass the data on to any third parties, and we will destroy your details once the research is complete. Your business will not be identified personally in any reporting. We conduct all our research in accordance with GDPR and in line with the Market Research Society guidelines. If you would like more information about how we will use the data you provide, please email Hannah Sterritt: hannah@miller-research.co.uk. Thank you.
1. *What outdoor activities does your organisation / business provide and what activities contribute most to your business? *The survey does not target activities such as angling, shooting, or other blood sports. (Matrix of degree of contribution / all – none)

- CLIMBING: Abseiling, Bouldering, Ice Climbing, Rock Climbing, Ropes Courses (inc. Zip Wires)
- WATERSPORTS: Board Surfing, Canoeing, Diving, Improvised Rafting, Kayaking (inc. River, Sea, Surf Kayaking and Sit-on-Top Kayaking), Sailing, Kite Surfing, Stand Up Paddleboarding, White Water Rafting, Wild Swimming, Windsurfing
- COMBINED WATER AND ROCK ACTIVITIES: Canyoning, Coasteering, Gorge Walking, Sea Level Traversing
- TREKKING AND LAND BASED ACTIVITIES: Bushcraft, Coastal Walking (excluding urban areas), Fell Running, Hill Walking, Horse Trekking, Lowland & Moorland Walking, Mountaineering, Mountain Biking, Off Road Cycling, Orienteering, Road Cycling (excluding urban areas), Scrambling, Skiing, Snow Boarding
- CAVING: Caving, Potholing, Mine Exploration
- AIR SPORTS: Paragliding
- Other (please specify)

2. In addition to the activities, you selected for the previous question, which would you say is the most commercially important activity for your business / organisation?

- CLIMBING: Abseiling, Bouldering, Ice Climbing, Rock Climbing, Ropes Courses (inc. Zip Wires)
- WATERSPORTS: Board Surfing, Canoeing, Diving, Improvised Rafting, Kayaking (inc. River, Sea, Surf Kayaking and Sit-on-Top Kayaking), Sailing, Kite Surfing, Stand Up Paddleboarding, White Water Rafting, Wild Swimming, Windsurfing
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- CAVING: Caving, Potholing, Mine Exploration
- AIR SPORTS: Paragliding
- Other (please specify)

3. Could you tell me when your business started?

• Less than a year ago • 1-2 years ago • 3-5 years ago • 6-10 years ago • 10+ years ago
4. What do you see as the advantages / disadvantages of having this business in Wales?
Free text box
5. Roughly how many FTE (Full Time Equivalent) equivalent staff do you currently employ? (Permanent / temporary)
• Full time, year-round (i.e.: Spring, Summer, Autumn Winter) • Part time, year-round (i.e.: Spring, Summer, Autumn Winter) • Temporary / seasonal / freelance (e.g.: Spring and Summer only)
About your visitors
6. In the last 12 months, how many visitors has your business received?
Free text box
7. Roughly what proportion of your visitors would you estimate come from the following areas? (Leave blank if you cannot estimate)
• Wales • UK (excluding Wales) • Europe (excluding UK) • Outside Europe
8. Roughly what proportion of your visitors fall within the following age ranges? (Per centage)
• Pre-school age (<4 years) • Primary school age (between 4 and 11) • Secondary school age (between 11 and 16) • 16-25 • 26-44 • 45-65 • 65+
9. On average, how much would you say visitors spend per head, per visit, with your business?

• £1-10 • £11-20 • £21-50 • £51-100 • £101-250 • £250-500 • £501+ • Don't know
10. From your experience, what proportion of your visitors are day-trippers (i.e.: living within travelling distance of your business). From your experience, what proportion of your visitors come from outside the region and are paying for overnight accommodation?
• Less than 10 per cent • Between 10 and 25 per cent • Between 25 and 50 per cent • Between 50 and 75 per cent • 75 per cent or more • Don't know
11. Of those visitors who come from outside the region and are paying for overnight accommodation, which of the following best describes how long they stay?
• Most stay for just one night • Most stay for a short break/weekend • Most stay for a week • Most stay for more than a week • It varies how long different visitors stay • Don't know
Social Impact
12. We would you like you to rate the following in terms of the benefits of outdoor adventure sports, and to tell us what you think is your main reason for people taking part: (Not at all important, not very important, Neutral, Important, very important, Main reason)

• Physical health and fitness benefits • Mental health and sense of wellbeing • Self-confidence and self-esteem • Adrenaline / excitement • Sense of belonging / camaraderie / purpose • Getting closer to nature Other (please specify)
13. Please share your social impact mission, if you have one, and paste a link to it on your website.
Free text box
14. What are the main factors that drive your social mission?
Free text box
15. To what extent does having social mission influence how you do business?
• Extremely • Moderately • Neutral • Slightly • Not at all
16. What changes in support, information or resources would enable you to make more impact?
Free text box
17. Who are the businesses or organisations that you look up to when it comes to making a difference?
Free text box
Business spend
The following questions relate to your business activity (income, business related spend and future expectations). Please note that the data we collect will not be used for any other purpose than for this study of the economic impact of the outdoor activity tourism in Wales. We will not pass the data on to any third parties, and we will destroy your details once the research is complete. It will not be possible to identify your business individually when we report on the research as all data will be anonymised.

18. What proportion of your annual business spend do you estimate is with suppliers in: (per centage)
• Local area • Wales • Outside Wales
19. What is your annual turnover?
• Less than £10,000 • Between £10,000 and £25,000 • Between £25,000 and £50,000 • Between £50,000 and £100,000 • Between £100,000 and £250,000 • Between £250,000 and £500,000 • Between £500,000 and £1,000,000 • Between £1m and £5m • Between £5m and £10m • More than £10m • I'd rather not say What would you say is your average profit margin? (Per cent)
20. Over the past three years (or as long as the company has been established for, if less than 3 years), what impact has the Covid-19 pandemic had on your business?
Free text box
21. Is the cost-of-Living crisis having an impact on your business?
• No • Yes If yes, please describe
22. In the next three years how do you anticipate your business turnover and workforce to change?

• Increase • Decrease • Stay the same • Don't know Why do you think this will happen? Given the increasing cost pressures businesses are facing in energy and staffing, are you able to make a profit and / or have surplus to invest in the business? Do you face any recruitment issues at present?
Other business information
23. Thinking about current business performance, are there any barriers to potential growth within the outdoor activity sector?
• No • Yes (please describe)
24. If there was an international league table of outdoor activity destinations, where would Wales come?
• Top of the league • Top 10 • Mid table • Bottom 10 • Bottom of the league Why do you say that?
25. Over the past three years has Wales' reputation for being an outdoor activity destination increased, decreased, or stayed the same?
• Increased • Decreased • Stayed the same Why do you say that?
26. Do you have any additional comments about the outdoor activity tourism sector in Wales?
Free text box
27. About your business
Name of Business
Postcode

Thank you
Thank you for completing the survey. Your views are greatly appreciated and will help to inform the research into the economic impact, in terms of value and employment, of the outdoor activity tourism sector in Wales. As we mentioned at the beginning of the survey, we would also really appreciate your help in sharing our visitor survey with your customers and others who may have undertaken an outdoor activity in Wales. The link to the survey is below: The survey asks for details about the activity undertaken, the nature of the visit and any money spent as a result. To encourage participation in the visitor survey, we are offering entry into a prize draw for the chance to win a £100 voucher to be spent on outdoor activities or goods. If you would like to know more about the project, please contact hannah@millerresearch.co.uk. Please click 'Done' to complete the survey.

Annex E - Economic Data Tables

Table 22 – Participant spend on activity vs other spend, excluding accommodation

Category	£0	£1-10	£11-20	£21-50	£51-100	£101-250	£251-500	£501+	Ave. £	Exc. Non Spend £
Undertaking the activity	42.1 %	16.1 %	12.6 %	13.8 %	9.2 %	4.2 %	1.5 %	0.6 %	29.00	50.04
Other spend excluding accommodation	17.9 %	28.1 %	23.4 %	18.1 %	6.4 %	3.4 %	1.9 %	0.9 %	31.62	38.50
Total									60.62	88.54

Source : Participant Survey Q8, n=486

Table 23 – Proportion of spend on accommodation, per night vs type of accommodation

	One night	A weekend / two nights	Three-to-six nights	One week - 10 nights	10 nights +	Average stay (nights)
Camping	14 %	45 %	19 %	2 %	19 %	4.0
Hostel / bunkhouse	4 %	75 %	17 %	4 %	0 %	2.6
Self-catering	7 %	20 %	47 %	27 %	0 %	4.8
Hotel / B&B / Pub	20 %	44 %	22 %	13 %	0 %	3.2
With friends / family	0 %	43 %	43 %	0 %	14 %	4.2
Other (please specify):	3 %	48 %	29 %	6 %	13 %	4.1
Column Total	11 %	48 %	25 %	9 %	8 %	3.7

Source: Participant Survey

Table 24 – Proportion of spend on accommodation per accommodation type

	£0	Less than £20	£21-£-£50	£5151-£80	£8181-£100	£101 - £200	£200+	Other	Ave spend (£)
Camping	7 %	55 %	31 %	5 %	2 %	0 %	0 %	0 %	21.55
Hostel / bunkhouse	4 %	42 %	42 %	8 %	0 %	4 %	0 %	0 %	30.42
Self-catering	7 %	0 %	33 %	27 %	20 %	7 %	7 %	0 %	70.33

Hotel / B&B / Pub	2 %	4 %	16 %	27 %	22 %	22 %	4 %	2 %	85.44
With friends / family	100 %	0 %	0 %	0 %	0 %	0 %	0 %	0 %	0.00
Other	15 %	36 %	33 %	6 %	0 %	0 %	0 %	9 %	19.24
Column Total	17 %	26 %	25 %	13 %	8 %	6 %	2 %	3 %	39.51

Source : Participant Survey Q9 vs Q10, n=194