

# ECONOMIC AND SOCIAL EVALUATION OF THE OUTDOOR ACTIVITY SECTOR IN WALES

2023

## KEY FINDINGS:

Outdoor activity providers & participants surveyed

**606** responses.



## WHAT NEXT?

↑↑↑  
**10%**

A **10% 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.

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.



There has been significant growth and change in the outdoor activity sector in **Wales** since the last report in 2014.

31,278 jobs supported  
**21%** of all tourism jobs in **Wales**.

Net economic impact of outdoor activity providers = £272.87m annually, of which **£205m** is retained in **Wales**.



The total net impact of outdoor activity tourism on the **Welsh** economy was measured at **£1.619 BILLION** annually.

The mental health value of the outdoor activities sector = **£26.54m** to **Wales** & £47.5m to the **UK**.

**99%**

of participants ranked 'seeking support for mental health and a sense of well-being' as important factors, with 94% ranking them as 'extremely' or 'very' important.

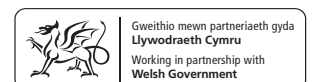


Individuals who engage with outdoor activity providers tend to stay longer and have a significantly higher spend per day. Participants who go with qualified guides are also more likely to follow agreed codes of conduct and good practice and behave appropriately in the outdoors.

Engagement through organised access to land and water are to be encouraged if **Wales** is to maximise the health, wellbeing, and financial benefits of outdoor activities, whilst maximising best practice in nature.

Visitors expressed a high level of satisfaction with **Wales** as a destination **94%** would come to **Wales**

again to undertake outdoor activities and would recommend **Wales** as an outdoor activity destination to a friend or relative.



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Ariennir y prosiect hwn gan Gronfa Her Meithrin Gallu Arfordirol Llywodraeth Cymru, a weinyddir gan WCVA.