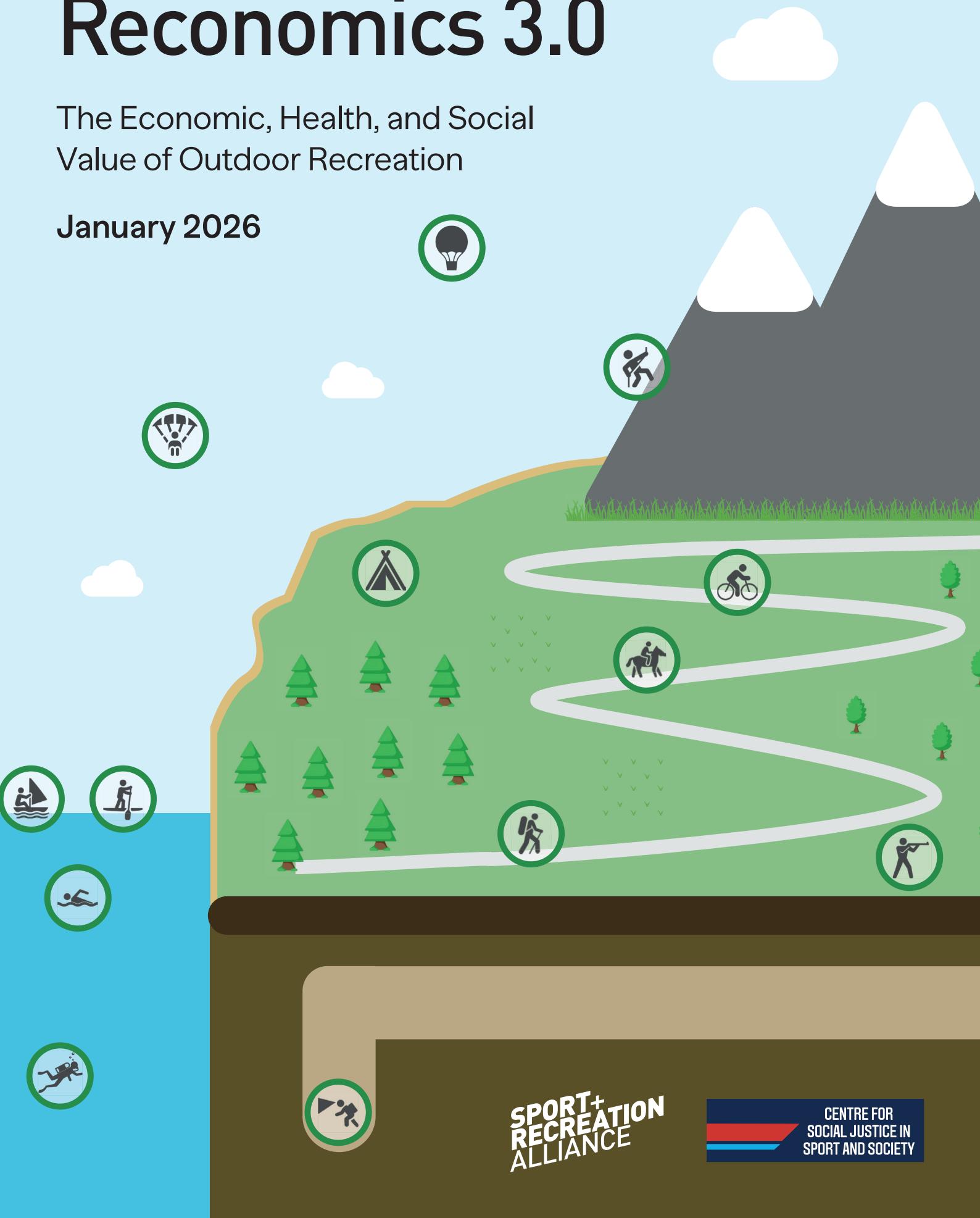


Reconomics 3.0

The Economic, Health, and Social Value of Outdoor Recreation

January 2026



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Foreword

Outdoor recreation is one of the UK's greatest assets, an enduring source of joy, wellbeing, and connection for millions of people. Whether it's walking through a local woodland, paddling on a river, or climbing in the hills, these experiences enrich our lives in ways that go far beyond the physical activity itself.

The updated Economics 3.0 research, commissioned by the Sport and Recreation Alliance's Water Outdoor Recreation Division, provides compelling evidence of the immense economic and social value that outdoor recreation delivers to the UK. It builds on a decade of work to quantify the contribution of outdoor activity to our economy, our communities, and our national wellbeing.

This report arrives at a critical time. As we face growing challenges around public health, environmental sustainability, and social cohesion, outdoor recreation offers a powerful, accessible solution. The findings show that outdoor recreation is not only a major economic driver, especially in rural areas but also a vital contributor to mental and physical health, community connection, and environmental awareness.

I am proud of the collaborative effort that has gone into this research, and grateful to our members, partners, and colleagues at Leeds Beckett University for their expertise and commitment. The insights presented here will help shape policy, inform investment, and inspire action across government, civil society, and the recreation sector.



Let this report be more than a document, it should be a call to action. A call to protect and promote outdoor recreation as a cornerstone of a healthier, happier, and more resilient nation.

L.T.

Lisa Wainwright MBE
CEO of the Sport and Recreation Alliance

Introduction

Background and Context

Reconomics 3.0 builds upon the Reconomics report (2014) and Reconomics Plus (2017) to give a timely update to the findings from previous reports. In the previous eight years numerous changes have impacted the outdoor recreation sector that necessitates an update from the previous reports:

- Demand for the outdoors is increasing, with a greater diversity of people wanting to access the same places and spaces for growing range of pastimes
- At the same time, inflation, increasing costs of materials, changes to accessing technical training/qualifications has made providing opportunities more expensive and more difficult
- Wider political discourses and global challenges including climate change, rising obesity and physical inactivity, and increasing inequalities also shape attitudes and access to outdoor recreation
- Challenges to public sector finances and investment available to the sector is also a key matter

A more complete summary of the research supporting this document is available at:

www.sportandrecreation.org.uk

Purpose of this Research

The Sport and Recreation Alliance (the Alliance), in partnership with members from the Outdoor Pursuits and Water Recreation divisions have worked with Leeds Beckett University towards the following aims:

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

Summary of Approach

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

Engagement Trends: Who is participating, in which activities, and how has this changed over the last decade.

Economic Value: What is the value of this engagement in terms of economic activity, including jobs, the value of buying equipment to support activities, the value of accommodation and travel to outdoor recreation areas.

Social Value: What is the value of this engagement to the individual ('primary value', measured in wellbeing), and to society ('secondary value', measured in savings to the national health system).

Reconomics In Numbers



Participation and Trends

Lots of people

34m

people including
1.9m children

Good Growth

3.1m

more people than
10 years ago

More Diverse

22%

avg. growth for ethnic
minority groups



Economic Value

Lots of jobs

1m

jobs generated

Big value

£22bn

value to UK
economy

Big share

29.3m

of all UK overnight
stays (25%)



Social Value

Big value

£46.8bn

in total social value

Huge savings

£5bn

in savings to
the NHS

Big share

43%

of sport & physical
activity value

Finding 1

Outdoor Recreation is a growing and increasingly diverse national pastime

Scale and Growth of Participation

Our study has identified over 34 million people use outdoor recreation as part of their blend of activities. This includes over 1.9 million children and young people.

Overall, 3.1 million more people are engaging in outdoor recreation compared to 10 years ago. This growth has been driven by the emergence of adventure activities such as paddle boarding (SUPing), open water swimming, bouldering, and fell running. The largest growth is the 'less extreme' activity of 'hill and mountain walking' with...

over 1 million more people taking part than 10 years ago.

Economic Background

There is a 11% point difference in engagement between those living in the third of the country of greater deprivation (21%) to those living in the third of the country with the lowest deprivation (32%). Growth in engagement for the middle third of deprivation and the lowest third is near identical at 23% over the last 10 years. Growth for the third of greatest deprivation is narrowly lower, at 21%.

Increasingly Diverse

Alongside this considerable growth, the people engaging with outdoor recreation has become increasingly diverse.

Age

The 75+ age category has seen **45%** growth in engagement over the last 10 years. Those aged 55-74 have grown by **35%**, compared to an average growth of **25%** across all age groups. Those aged 16-34 are most likely to engage at **37%**.

Gender

Female engagement (**26%**) has grown faster than male (**23%**) over the last 10 years. Men are **5%** points more likely to engage than female (**30% & 25%**).

Ethnicity

'White Other' (**35%**), 'Mixed' (**32%**), and Chinese (**30%**), are more likely than 'White British' (**29%**) ethnicities. Despite the lowest engagement (**16%**), 'Black' ethnic groups have seen the greatest growth, increasing participation by **38%**.

Growing Participation

About

The National Indoor Climbing Awards Scheme (NICAS) is an educational charity delivering structured award schemes that guide climbers from indoor walls to lifelong participation in climbing and mountaineering.

Reconomics 3.0 highlights the wellbeing and tourism value of outdoor participation, with 29.3 million UK trips involving outdoor activity each year. Indoor centres like Brookes Climb play a vital role in seeding that participation, using NICAS to support the next generation of climbers. NICAS has seen a 17% increase in new climbers over the past five years, with over 20,000 people starting their journey annually.

Nadia's Story

University life can be both exhilarating and overwhelming. Nadia, a first-year student facing academic pressure and loneliness away from home, joined a NICAS session at Brookes Climb after spotting a campus poster: "Learn to climb. No experience needed." By the end of her induction, she had six new friends. The structure of NICAS offered something many students lack: a welcoming, judgement-free routine. As the group progressed through Levels 2 and 3, climbing became their anchor during exams.



More Diverse and Inclusive

About

The British Mountaineering Council (BMC) is the national representative body that champions climbers, hill walkers, mountaineers and ski mountaineers.

The BMC's Story

We are committed to making our activity more inclusive and accessible to people of all backgrounds, ages and abilities. BMC research identified barriers to outdoor participation, including cost, long working hours, limited transport, expensive equipment and cultural perceptions, which often favour wealthier demographics and limit diversity.

In response, the BMC delivers a national hill walking programme offering free guided walks across ten regions, with more than 50 walks each year.

The programme removes practical barriers while linking physical activity with learning. Volunteers are trained to become local champions running independent activities. Participants report improved confidence and social connection, as shown by Fatima from Bradford, who described her first hill walk as "meeting nice people and being in harmony with nature, with a lovely leader... definitely I will do it again."



Finding 2

Outdoor Recreation is a significant contributor to the economy, especially in rural areas

Scale of Economic Contribution

Around **1 million full time jobs** (or equivalent) are associated with outdoor recreation, including:

670,000

jobs supporting boating activities;

67,000

jobs supporting shooting activities; and,

226,000

jobs supporting camping and caravanning.

Rural Economy

In terms of the density of businesses related to outdoor recreation, the top seven are all 'rural' local authorities (including the Highlands, Cornwall, Lake District, Westmorland and Furness, Cumberland) and areas of National Parks in Wales.

Cities and urban areas with high densities of related businesses are also located close to National Parks, greenspaces and blue spaces (e.g. coastal areas).

Jobs related to the equestrian industry are the second greatest employer in rural areas, after farming.

Combined, the outdoor recreation 'sector' is worth **£22bn to the UK economy** annually. Key contributors to this figure include:

£12.2bn

is generated by camping and caravanning in visitor expenditure;

£5bn

generated by the equestrian industry;

£2.1bn

generated by boating and watersports;

£3.3bn

generated by shooting; and,

£1.3bn

generated by angling.

Further, outdoor recreation is a huge motivator for trips and visitor spend with the UK's tourism industry. **29.3 million trips (25% of all trips)** involved taking part in outdoor leisure activities. **£8.4 billion (27% of the overall trip spend)** was spent on trips involving outdoor recreation.

Thriving Enterprises

About

Alpkit was founded on friendship and a shared love of the mountains, with a simple idea: sell well-designed outdoor gear directly online and build a brand rooted in the belief that time outside benefits everyone.

Over the past decade, Alpkit has grown twenty-fold from a small start-up into a leading British direct-to-consumer outdoor brand, with stores from Inverness to Kingston upon Thames.

This journey has created more than 190 jobs across design, UK manufacturing, repairs, retail, customer service and logistics, guided by strong commitments to environmental responsibility and social justice.

Durability and repair are central to its impact, with products designed to last and the UK's largest in-store outdoor repair service extending the life of equipment.

Through the independent Alpkit Foundation, over £1 million has supported 3,000 grassroots projects widening access to the outdoors. With UK Export Finance support, Alpkit is expanding internationally, demonstrating how a purpose-led SME can grow sustainably while increasing access to wild places.



Rural Employment

About

British Equestrian is the national federation for horse sports in Great Britain, affiliated to the FEI.

The UK equestrian sector is a vital part of the rural economy, employing around 230,000 people in 2023, making it the second-largest rural employer after agriculture. The 2024 State of the Nation Report highlights the scale of the workforce, with 5,664 grooms, 10,149 coaches and 4,766 officials affiliated to the federation. Valued at £5 billion, the sector supports an extensive rural

supply chain including riding schools, livery yards, breeders, farriers, veterinarians, transport, tourism and hospitality, strengthening local economies and rural resilience.

British Equestrian supports workforce development through education pathways, apprenticeships delivered by Olympic disciplines, and coaching qualifications, alongside bursaries for new and underrepresented coaches. To address workforce challenges, it has launched a Good Employment hub to improve recruitment and retention. As outlined in the British Equestrian The Power of Horses and the RDA Impact report 2025, volunteers gain many benefits, particularly transferable skills, self-confidence and community engagement that often lead into employment and deliver significant social value in rural areas.



Finding 3

Outdoor Recreation produces significant savings of NHS resources

Scale and Savings to the NHS

Participation and volunteering related to outdoor recreation produces savings to the health care system of valued at over **£5 billion**.

Notably, outdoor recreation substantially over indexes on conditions that impact people aged 65+ including over **38,000 cases** of dementia, and over **17,000 cases** of hip fractures. Further, the preventative dividend of outdoor recreation is estimated to prevent almost 15 million GP visits per year.

Areas of greatest impact include preventing:

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

A full breakdown of savings is provided below:

Condition Area	Cases	Impact (£ mil)
Coronary Heart Disease (CHD)	68,656	£406.78
Stroke	49,211	£382.30
Type 2 Diabetes	281,289	£1208.82
Breast Cancer	2,029	£42.78
Colon Cancer	1,987	£34.83
Bladder Cancer	502	£13.01
Endometrium Cancer	619	£16.02
Oesophagus Cancer	603	£15.62
Gastric Cancer	388	£10.07
Renal Cancer	422	£10.94
Dementia	38,581	£496.38
Clinical Depression	588,864	£1267.04
Hip Fractures	17,294	£333.09
Back Pain	417,767	£265.55
Reduced GP Visits	14,937,615	£256.68
Reduced Psychotherapy Services	15,524,821	£366.80
Increased Risk of Injury	10,680	-£62.95
Total Secondary Value of Outdoor Recreation		£5.06 billion

Supporting Cancer Recovery

About

Leading equestrian charity, British Horse Society, champions and improves safety for horses and horse lovers, equine welfare, off-road access, participation and education.



Catriona's Story

Its impact is reflected in individual journeys such as that of Catriona, a lifelong rider and BHS access volunteer. Over 23 years, Catriona has faced multiple serious health challenges, including breast and thyroid cancers and Parkinson's. Throughout prolonged treatment and recovery, riding and access to the countryside played a vital role in her resilience and wellbeing. Setting personal goals linked to horses, walking and riding with young ponies, and daily connection with nature supported both her physical recovery

and mental strength. Motivated by these benefits, Catriona has dedicated her life to researching and restoring ancient bridleways to public use.

Catriona's story demonstrates the BHS's wider impact: protecting access to the countryside while improving health, confidence and quality of life through equestrian activity. "Accessing the countryside from the back of a horse is the perfect painkiller".

The Health Benefits of Walking

About

Ramblers is the only charity dedicated to removing barriers so everyone can enjoy walking in green spaces and improve access to Britain's walking routes.

Dee highlights walking's accessibility: it is free, requires no equipment and welcomes all abilities. Her journey shows how Ramblers Wellbeing Walks empower individuals to improve their health while building inclusive, supportive communities through simple, shared walking experiences.



Ramblers Wellbeing Walks programme offers free, short walks designed to support better health, wellbeing and happiness for people like Dee, whose story illustrates the programme's impact. At nearly 17 stone, everyday walking was difficult and she lacked confidence to exercise. After losing weight, walking became her first step towards a healthier lifestyle. Discovering Ramblers Wellbeing Walks gave her both motivation and social connection. Seeing an opportunity to lead, Dee went on to set up her own group, which now attracts 20 to 25 walkers each week. For participants, the walks support physical activity, mental wellbeing and friendships.

Finding 4

Outdoor Recreation produces significant uplifts in mental wellbeing

Scale of Contribution

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

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

Using the methodology established in Sport England's Social Value reports, which in turn is built upon HM Treasury's Green Book and Guidance on project evaluations, [this activity produces a primary value of £41.8 billion per year](#):

£37.56bn

Adult participation:

£1.8bn

Children and young people participation

£2.3bn

Adult volunteering

Boosting Mental Wellbeing

About

Swim England, the national governing body for swimming, diving, water polo and artistic swimming, has seen a remarkable rise in open water swimming across the UK.

In 2016-17, around 266,000 adults swam regularly in lakes, rivers or the sea; by 2023-24, this number had more than doubled to 543,000.

Overall, over 4 million adults take part in open water swimming annually, reflecting its growing appeal for physical fitness, mental wellbeing, and connection with nature.

One member of the Bluetits Chill Swimmers described year-round sea swimming "the second I hit that cold water, everything shifted - the chill



snaps you into the moment. No racing thoughts, no overthinking, just breathing, moving, and soaking up the sea and sky."

The scale of engagement is even more impressive: more than 4 million adults take to lakes, rivers, and seas each year. This surge demonstrates the growing recognition of open water swimming as a fun, accessible, and rewarding way to stay active and connect with nature.

Activity in All Environments

About

Parkour UK, the National Governing Body for parkour, promotes safe, inclusive, and accessible practice while encouraging physical activity for all.

SUPA XXL, a London-based parkour community, exemplifies this approach. Founded over 20 years ago via a Facebook group, SUPA XXL has grown into a vibrant hub, hosting open Sunday jams that attract 30-50 participants regularly,



and sometimes over 70. Attendees range from world-class athletes to first-time parkour practitioners, creating a truly inclusive environment.

The community thrives on a grassroots ethos, using underutilised urban spaces, documenting training through vlogs, and undertaking DIY projects such as rebuilding walls to enhance practice areas.

By combining structured sessions with informal social connections, SUPA XXL fosters skill development, creativity, and community cohesion. Its success highlights how parkour can transform city spaces into inclusive, active environments, demonstrating Parkour UK's mission to grow the sport and strengthen the local scenes, offering an inclusive space for all levels to practice and grow in a thriving national community.

	'Actives'	Population	Activity Share	Multiplier	Impact (£ mil)
Participation (Adults)	0 Characteristics	15,297,725	45.35%	£2,300	£15,957
	1 Characteristics	10,252,696	52.71%	£2,500	£13,510
	2+ Characteristics	2,362,597	56.85%	£3,800	£5,104
	Adult 'Actives' subtotal				
	'Fairly Actives'	Population	Activity Share	Multiplier	Impact (£ mil)
	0 Characteristics	2,086,004	53.40%	£800	£891
	1 Characteristics	1,830,081	57.43%	£1,100	£1,156
	2+ Characteristics	583,918	57.93%	£2,800	£947
	Adult 'Fairly Actives' subtotal				
	Wellbeing Values of Participation (Adults)				
	Frequency	Population		Multiplier	Impact (£ mil)
	Weekly	860,530		£2,100	£1,807
Volunteering (Adults)	Monthly	561,805		£1,000	£561
	Wellbeing Values of Volunteering (Adults)				
	Frequency	Population	Activity Share	Multiplier	Impact (£ mil)
Participation (CYP)	'Actives'	1,440,329	23.98%	£4,100	£1,416
	'Fairly Actives'	501,401	28.82%	£3,100	£447
Wellbeing Values of Participation (CYP)					£1,864
Total Primary Value of Outdoor Recreation					£41.79 bn

Finding 5

The true value of outdoor recreation goes far beyond these numbers

Engagement in outdoor recreation generates substantial value to society across a range of different areas, the impact of which cannot easily be reflected in numbers. These benefits are no less crucial when considering the overarching value of outdoor recreation to the nation.

This section focuses on three areas of benefit engagement in outdoor recreation brings:

Deeper connection to nature, encouraging greater awareness of environmental conditions and the need for sustainable behaviours that benefit society.

Strengthen communities, by creating inclusive spaces for social interaction and mutual support.

Awareness of cultural heritage, associated with the UK and myriad other cultures helping to provide a sense of identity and belonging.

Connecting Communities

About

British Nordic Walking (BNW) partners with health, community, and physical activity organisations to create accessible opportunities for people to become more active, including those living with long-term conditions or returning from illness. Nordic Walking is low-impact and evidence-based, improving both physical and mental wellbeing.

A study led by Sarah McCracken, an NHS Parkinson's nurse, explored an eight-week Nordic Walking programme for people with Parkinson's. 40 participants experienced improvements in mobility, posture, cognition, mood, sleep, and fatigue. Focus groups highlighted the value of social interaction, peer support, safe environments, skilled instructors, and partnerships with

Parkinson's UK and BNW. Participants appreciated walking with friends and family, fostering lasting lifestyle change.



Inspired by the programme, participant Christine trained as an instructor and now runs weekly social sessions. As a BNW ambassador, she advocates for exercise provision in Parliament, helping secure funding to expand community-led Nordic Walking groups, demonstrating its power to strengthen social connections and transform lives.

Environmental Awareness and Connection

About

Paddle UK, the national governing body for canoeing, leads initiatives to promote environmental stewardship alongside outdoor recreation.

The Big Paddle Cleanup, launched in 2022, mobilises kayakers, canoeists, and paddleboarders to remove litter from waterways inaccessible to conventional clean-up efforts, protecting natural habitats and preventing pollution from reaching the ocean.

Since inception, over 11,700 volunteers have removed more than 6,200 large sacks of waste, including plastic, glass, cans, and unusual items such as car batteries and chairs. The largest event

in 2025 involved 4,228 volunteers contributing 8,130 hours, clearing 2,129 sacks of litter containing thousands of bottles, cans, and wrappers.



This grassroots, self-funded initiative safeguards water quality, supports biodiversity, and preserves the aesthetic and recreational value of rivers and canals. As stated by a representative of local community canoeing clubs: "Keeping the canal litter-free is essential not only for paddlers but also for the diverse wildlife that calls it home."

Heritage and Culture

About

GB Outrigger develops the sport of outrigger while preserving its rich Pacific heritage.

Introduced to the UK in 1978 through an English Channel crossing, outrigger brings participants into direct contact with Pacific traditions, including rituals, chants, and protocols that honour the va'a (outrigger) as a living part of the 'ohana (family). Cultural practices such as kirakia (prayers), luau, hula, haka, and lei-making deepen participants' understanding of Pacific heritage while fostering community.

In 2022, the UK's governing body of the sport, GB Outrigger, hosted the International Va'a Federation World Sprint Championships at Dorney Lake, the first European nation to do so.

The nine-day event attracted elite athletes, officials, and supporters globally, boosting local hotels, restaurants, retail, and transport. Beyond economic benefits, it strengthened UK outrigger expertise, supported club growth, and increased participation. The event demonstrates how sport can safeguard heritage, connect communities, and translate cultural traditions into lasting national impact.



Making Our Case

This paper set out to capture the scale and scope of the contribution of outdoor recreation to the nation.



“Use this evidence to make the case for outdoor recreation to be recognised and prioritised as a means of tackling societal challenges.”

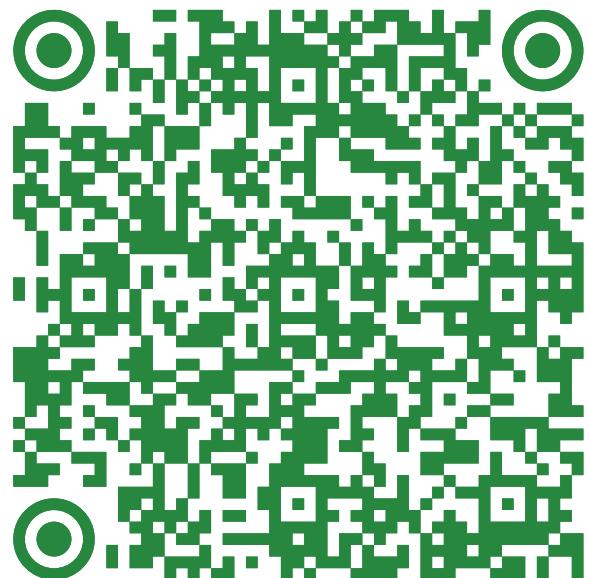
A Community Committed to Environmental Protection

Economic Growth: Outdoor recreation represents a huge a growing area of lifestyle for millions of people in the UK, with billions of value generated, often in rural areas.

Support for Environment / Net Zero: Outdoor recreationists are proven to be keen environmentalists and typically support sustaining the quality and condition of the environment.

Healthcare: outdoor recreation produces substantial savings to the UK health system. As society ages, outdoor recreation will support people to enjoy longer, healthier lives as they stay active through one of its component activities.

Scan the QR code to access the full report



Get in touch

We actively encourage you to get in contact with us for any queries or requests

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