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The Profile
UK Outdoor Report 2018
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INTRODUCTION

Background

The UK is the second largest outdoor market within Europe, behind Germany and just ahead of France. This, alongside an open trading policy, makes the UK a highly attractive and natural destination for any and all discerning outdoor suppliers.

The marketplace offers a rich combination of domestic, distributed or subsidiary-run companies resulting in a varied and complex diversity of brands traditionally supplied by small-to medium-sized businesses.

Definition

The definition of 'outdoor' differs from source to source and from country to country. There are no actual parameters regarding where it starts or stops and, to a degree, what is included or excluded.

Core activities are walking (hiking/trekking), climbing and mountaineering and camping; there is cross-over activity from trail running, mountain biking and snowsports. Wider outdoor pastimes (*not covered in this report*) include country pursuits such as shooting and fishing plus aspects of equestrianism and watersports.

The outdoor industry (as opposed to recreation) is defined in this report as the manufacture, supply and retail of outdoor products which includes apparel, footwear and equipment.

Within this report, we use both wholesale and retail valuations. Supplier's (*company*) accounts will be wholesale, whereas retailer's accounts will reflect retail sales (*both exclude VAT*). Growth in direct-to-consumer (DTC) sales now means that some suppliers' figures include retail revenue. Market valuation, unless otherwise stated, is at retail.

Modern times

As new activities develop, ranging from adrenalin through mountain to urban, so the lines between outdoor, sport and lifestyle become increasingly blurred. This is most noticeable in the apparel and footwear categories as brands extend the boundaries of urban outdoors and outdoor lifestyle to supplement growth and grow market share.

Channels

We estimate that approximately a quarter of product is sold parallel to or outside the industry including lifestyle, sports and department stores as well as internet companies such as Amazon, eBay and Zalando.

In addition to specialist retailers, a large element of camping goods (primarily family) is sold through high street players such as Argos and Halfords as well as supermarket chains Tesco and Lidl. Tents, sleeping bags and camping equipment are also sold through camping and caravanning stores.

Specialist in nature, climbing equipment (helmets, harnesses, head-torches, ropes, and hardware accessories such as belay devices, carabiners and slings) are also sold to the work and rescue sector. There is also a workwear sector.

Market conditions

While the market remains relatively healthy, external factors such as the consequences of the Brexit vote, particularly on pricing, changing consumer habits and market consolidation have led to a challenging market place and a general feeling of uncertainly prevails, especially when it comes to future planning. With a variety of strategies and tactics being employed across the board, we are likely to see some big winners in the next 18 months; in balance, it's also likely that we will see big losers.

The report offers a snapshot of the UK outdoor industry and will hopefully provide you with a clear and precise working document.

Peter Luscombe
Director

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