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The Profile UK Outdoor Report 2018 Table and Contents

A Profile publication May 2018

CONTENTS

PAGE NO

Contents	2
Tables	5
Introduction	7

Section One – Market background

The United Kingdom	11
Population densities	13
The economy	14

Sector Two – UK outdoor sector

The outdoor industry	18
The outdoor recreation and leisure industry	18
Active lifestyle	20

Sector Three – Participation

Sports participation	22
Walking	23
Camping	25
Climbing and mountaineering	26
Running/jogging	27
Trail running	27
Triathlon	27
Cycling	28
Mountain biking	29
Caving	29
Snowsports	29
Paddlesports	30
Watersports	30

Sector Four – The outdoor marketplace

European trading conditions	32
UK trading conditions 2005-2017	34
UK State of Trade Survey	38

Sector Five – Market size

Market size	43
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Sector Six – Product sectors and developments

Category development	46
Apparel	48

Outerwear/waterproofs	49
Insulated	49
Fleece	50
Softshell	50
Base layer	51
Travel clothing	51
Snowsports	51
Softwear accessories	52
Socks	52
Other	52
Apparel market value	53
Footwear	54
Market trends	52
Leading players	
Market size	53
Outdoor equipment	
Outdoor equipment	56
Packs & luggage	57
Tents	59
Sleeping bags	61
Snowsports	63
Climbing equipment	64
Other - camping equipment, navigation and hardware accessories	65
Sector Seven - Suppliers	
U.S. Trading conditions	68
Market conditions 2018	69
International trade shows	70
Outdoor Groups	71
Pentland Group Plc	72
Regatta Group	73
Bollin Group	74
SD Outdoor Group	75
Sector Eight – Brand profiles	
Leading companies	77
Direct to consumer (DTC)	77
Leading companies by turnover	78
Regatta	81
The North Face	82
Berghaus	84
Craghoppers	86
Equip Outdoor Technologies	87
AMG Group	89
Osprey Europe	90

Coleman UK	91
Outdoor & Sports Company	92
Hi-Tec Sports	93
Merrell	94
Burton McCall	95
Bradshaw Taylor	96
Lyon Equipment	97
Salomon	98
Helly Hansen	99
Jack Wolfskin	100
Mountain Boot Company	100
Montane	101
Others	102

Sector Nine - Retail

High Street Retail	112
Trading conditions	114
UK outdoor retail - a changing landscape	116
Mono brand offering	119
Direct to consumer	120
Own /private label	122
Store count	123
Outdoor retailers by turnover	124
Outdoor retailers ranked by operating profit	126
Outdoor retailers ranked by operating profit margin	126
Outdoor retailers ranked by gross profit margin	127
Retail employment	128
Employee's remuneration	129

Sector Ten - Retail profiles

JD Sports Outdoor	131
Blacks and Millets	132
Tiso	137
Go Outdoors	139
Outdoor & Cycle Concepts/Snow + Rock	142
Mountain Warehouse	148
Jacobs & Turner Trespass	150
Ellis Brigham	151
Rohan Design	152
Mileta Sports -Tog 24	153
Yeomans	154
SportsPursuit	155
Field & Trek	156
Nevisport	156
Alpkit	157
Other	158

Sector Eleven- Directory

Trade shows	161
Organisations	161
Suppliers	162
Retailers	163

1	The UK population by age and gender 2017	12
2.	The UK population by country 2017	13
3.	Which outdoor activities do you regularly take part in?	24
4.	Watersports Participation Survey 2016	30
5.	European Outdoor Sales - Regional Summary 2016	32
6.	What are your general views on how the UK market performed in 2017?	38
7.	In terms of business confidence, how do you feel compared with last year?	39
8.	Based on forward orders, how do you think SS2018 will perform?	39
9.	In terms of business confidence, thoughts on 2018 domestic sales	40
10.	What do you believe are the key issues affecting trade?	40
11.	Do you believe price rises will impact consumer demand?	41
12.	UK outdoor sales 2010-2017	43
13.	UK outdoor sales by product category 2017	44
14.	Apparel sales by value 2008-2017	53
15.	Footwear sales 2008 - 2017	55
16.	Outdoor equipment sales 2008 - 2017	66
17.	Leading outdoor Groups by value 2017	71
18.	Bollin Group turnover 2012-2016	74
19.	Top UK suppliers by turnover £m's 2014-2017	78
20.	Outdoor companies by the number of employees 2015-2017	79
21.	Outdoor companies by the number of employees 2015-2017	80
22.	Regatta Ltd sales 2013 - 2017	81
23.	Berghaus Ltd sales 2012 - 2016	85
24.	Craghoppers Ltd sales 2013-2017	86
25.	Equip Outdoor Technologies Ltd sales 2016-2017	87
26.	AMG Group Ltd sales 2012-2016	89
27.	Osprey Europe Ltd sales 2014-2017	90
28.	Coleman UK Ltd sales 2012-2016	91
29.	Outdoor Sports Company Ltd sales 2012-2016	92
30.	Hi-Tec Sports UK Ltd sales 2012-2016	93
31.	Wolverine Worldwide Europe Ltd sales 2013-2016	94
32.	Burton McCall Ltd sales 2012-2016	95
33.	Bradshaw Taylor Ltd sales 2013-2016	96
34.	Lyon Equipment Ltd sales 2013-2017	97
35.	Amer Sports UK Ltd sales 2009-2013	98
36.	Helly Hansen UK Ltd sales 2012-2016	99
37.	Mountain Boot Company Ltd sales 2013-2017	100
38.	Montane Ltd 2012-2016	101
39.	Leading retail Groups/companies by turnover/store count 2018	117
40.	Mono-brand retailers turnover and number of stores	119
41.	Top 14 outdoor retailers by number of stores 2016-2018	123
42.	Outdoor retailers by turnover £m's 2014-2016	124
43.	Outdoor retailers turnover £m's 2016-2018	125
44.	Retailers ranked by operating profit 2015-2017	126
45.	Retailers ranked by operating profit margin 2015-2017	126

46.	Retailers ranked by gross profit margin 2015-2017	127
47.	Retailers by number of employees 2015-2017	128
48.	Retailers employee remuneration 2015-2017	129
49.	Blacks Outdoor Retail sales 2014-2017	135
50.	JD Sports Outdoor Ltd division sales 2013-2018	136
51.	Graham Tiso Ltd sales 2013-2017	138
52.	Go Outdoors Topco Ltd sales 2008-2017	141
53.	Outdoor & Cycle Concepts Ltd /Cotswold sales 2005-2016	144
54.	Snow+Rock Sports Ltd sales 2010-2014	147
55.	Mountain Warehouse Ltd sales 2005-2017	149
56.	Jacobs & Turner Ltd (Trespass) sales 2013-2017	150
57.	Ellis Brigham Holdings Ltd sales 2013-20-17	151
58.	Rohan Designs Ltd sales 2013-2017	152
59.	Mileta Sports Ltd (Tog 24) sales 203-2017	153
60.	Yeomans Outdoor Leisure Ltd sales 2012-2016	154
61.	SportPursuit Ltd sales 2014-2017	155
62.	Nevisport sales Ltd 2011-2015	156

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 uncertainty 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

Profile (Outdoors) Ltd