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The Profile UK Outdoor Report 2022

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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 to 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, while there is crossover activity from trail running, mountain biking and snowsports. Wider outdoor pastimes (not covered in this report) include country sports such as shooting, angling and 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 often include both wholesale and retail (DTC), whereas retailer's accounts will reflect retail sales (both exclude VAT).

Market valuation, unless otherwise stated is at retail (excluding VAT).

changing landscape

Individual outdoor participation, no matter at what level, is built around enthusiasm and driven by passion for the outdoors. It is usually presented as a return to nature and the natural environment, working as the perfect antidote to the stresses of modern-day living.

Consumer response to Covid-19 was characterised by a rapid adjustment of habits and expectations plus ingenuity and re-discovery. With many brands and retailers adapting quickly to the new circumstances, the short-term accelerated the evolution of interaction and brand appeal.

The rapid adoption of remote working, acceleration of online shopping and digital communication as Zoom and Team meetings replaced trade shows highlighted changing patterns of work and trade.

2022 is set to be an interesting year for UK high street retail as the sector looks to shake off the challenges of the last two years and take a big step forward to defining what the future shopping experience will look like.

The future is exciting, with new technology paving the way for a more immersive online experience, new consumer behaviour driving both product and business model innovation, and the world's biggest brands putting aside local competitive pressures to tackle the biggest issues facing our society and planet.

However, 2022 won't be plain sailing for all. There are plenty of headwinds to keep retailers' minds focussed on the here and now; COVID-19 remains a concern as long as new variants are emerging and parts of the world remain unvaccinated, the supply issues of aren't completely behind us, and household finances are under increasing pressure as a squeeze on the cost of living takes hold for many, putting a dampener on the ability of the consumer spending.

Outdoor-related product development has seen a steady shift in focus from purely performance to what is best described as 'performance-plus'. That plus being the keywords sustainability, recycled, circularity, diversity and inclusion, though not exclusively.

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

Peter Luscombe
Director

Profile (Outdoors) Ltd