

LATEST EOG RESEARCH 2018:**GROWTH IN CLIMBING CATEGORY, BUT A FLATTER OVERALL PICTURE FOR THE OUTDOOR MARKET**
**EUROPEAN
OUTDOOR
G R O U P**

The latest research released by the European Outdoor Group (EOG) indicates that the climbing category grew in 2018, while the overall outdoor market flattened out. The EOG has unveiled top line results from its comprehensive State of Trade project, using data from 115 brands in Europe to analyse sell-in information for seven main categories and 48 separate sub-categories.

In line with expectations, sell-in during the year was generally flat compared to the previous year, returning to a picture of the market that is similar to what was experienced in 2015 and 2016. The wholesale market in 2018 was worth €5.81bn*, 1% down in value and 0.5% down in volume on the previous year. However, the outdoor market continues to be resilient, in the context of challenging market conditions, increasing competition from non-core outdoor entrants, and turbulent social and political times.

**STATE OF TRADE
OUTDOOR MARKET 2018**

**CATEGORY % CHANGE
Y ON Y 2018 COMPARED TO 2017**


CATEGORY	VALUE	VOLUME
APPAREL	-0.8%	0.3%
FOOTWEAR	-0.7%	-0.9%
BACKPACKS & LUGGAGE	-2.6%	-1.2%

Countries and regions

Countries and regions generally performed in line with the overall figures, recording growth or decline ranging from +1% to -1%. The year was slightly more difficult in Austria and Switzerland, a view supported by feedback from EOG members. Once again, the largest three individual country markets were Germany, France and the UK, which together represent 50% of the sector,

and therefore heavily influence the development figures.

Category development

The data for 2018 reveals that climbing grew strongly, by 5.7% in value and 6.1% in volume. Elsewhere, figures again reflected the overall picture, though there was more of a decline in sleeping bags (-4.7% in value and -4.9% in volume).



Since its launch, State of Trade has developed into the most comprehensive and robust market research project for the European outdoor sector. As well as analysing the data that was submitted, the EOG also sought expert opinion from across the industry to peer review figures. That work helped to validate the numbers and that the 2018 results are in line with the expectations of those who were consulted.

Pauline Shepherd, EOG head of market research, comments:

"Despite some clear challenges in the market, the outdoor sector continues to show resilience, driven by innovation and the ability of the industry to adapt. The growth in climbing is encouraging to see and is another example of how our sector plays a role in developing wider sporting goods and lifestyle categories. Climbing is in the spotlight more than ever, not least because of its inclusion in the Tokyo 2020 Olympic and Paralympic Games, and that has clearly had an impact on the wider general public and on these figures."

LAUNCH OF NEW RETAIL POINT OF SALE BENCHMARKING REPORT



OVERVIEW

The European Outdoor Group (EOG) has set up a retail point of sale benchmarking report for the outdoor sector and invites retailers and brands with retail to join this important initiative for the industry.

KEY METRICS FOR THE OUTDOOR SECTOR

- Performance of outdoor and sport segments
- Performance of product category for outdoor
- Total turnover bricks and mortar (B&M)
- Total turnover online
- Conversion rate
- Mark down
- Return rate
- Number of doors measured
- Number of B&M and online stores measured
- Number of countries measured and European overview

WHAT MARKETS DO YOU COVER IN THE REPORT?

The report covers the outdoor markets in detail and also other sport segments. A country by country analysis will be available as well as an aggregated summary for Europe.

WHAT DO WE RECEIVE?

Participants receive a quarterly report and a monthly KPI score card of key metrics for the sector. In addition, the EOG will add key consumer trends and market insights to complement the figures in the report.

DATE SECURITY

Key quality controls are in place to ensure data quality and data protection for the participants. The anonymity of each EOG member, and every other contributor, is secured.

NEXT STEPS

New companies can join straight away and receive a secure FTP log in, unique to your company. Once you join you will start to receive the monthly metric score card and a market report each quarter.

CONTACTS

The European Outdoor Group +44 1539 727 255
pauline.shepherd@europeanoutdoorgroup.com
annycardinal@europeanoutdoorgroup.com

EUROPEAN OUTDOOR GROUP
Gärdestrasse 3, Postfach 7142, 6300 Zug, Switzerland. Tel: +41 (0) 1539 727255
info@europeanoutdoorgroup.com | www.europeanoutdoorgroup.com

The EOG will continue to enhance and expand its market research programme. For sell-in data, reflecting its wider membership, the association is running a pilot report on snowboarding products as part of State of Trade 2018, and figures will be published around the end of the year**.

For sell-out, the EOG has been running a retail point of sale project with its retail members for the last 18 months. The association will now open up this project up to the wider market, for any retailer or brand with retail, that sells outdoor products in Europe. Full details of this initiative, and how to get involved, can be found in the infographic below:

Details will also be posted on the EOG website and shared through other platforms after the Outdoor.

For more information about the EOG's market research programme,
[email marketresearch@europeanoutdoorgroup.com](mailto:marketresearch@europeanoutdoorgroup.com).

*Value is not adjusted for currency/inflation // **Subject to sufficient market coverage

Source: EOG