



PO Box 50, Kendal, Cumbria LA9 4GW
t: **01539 730400** e: **profileconsultancy@btinternet.com**

The UK Outdoor Report 2008

A Profile publication

Contents pages, tables and Introduction

February 2008

CONTENTS	PAGE NO
Introduction	6
Executive Summary	7
 Section One – Market background	
1.0 The United Kingdom	11
Population	12
1.1 Sports Participation	13
 Sector Two The Marketplace	
History	14
Market definition	15
Overview	17
General trading trends	18
The specialist outdoor market	18
The Outdoor market	19
Market segmentation – product categories	20
2.0 Clothing	20
2.1 WATERPROOFS	22
Market size	22
Market share	22
Waterproof retail survey	23
2.2 FLEECE	24
Market size	24
Market share	24
2.3 BASE LAYER	25
Market size	25
Market share	25
Base layer retail survey	26
2.4 TRAVEL CLOTHING	27
Market size	27
Market share	27
Travel clothing retail survey	28
2.5 SNOWSPORTS	29
2.6 CLOTHING ACCESSORIES	29

2.7	Footwear	30
	Market size	31
	Market share	31
	Footwear retail survey	32
2.8	Equipment	33
2.9	TENTS	34
	Market size	34
	Market share	34
2.10	RUCSACS	36
	Market size	36
	Market share	36
	Rucsac retail survey	37
2.11	SLEEPING BAGS	38
	Market size	38
	Market share	38
2.12	NAVIGATION, CAMPING EQUIPMENT AND ACCESSORIES	39
	Navigation	39
	Camping equipment	39
	Hardware accessories	39
2.13	SNOWSPORTS EQUIPMENT	40
	Market size	40
2.14	CLIMBING HARDWARE	41
	Market size	41
	Market share	41
Sector Three Suppliers		
	Supply structure	43
	Market background	43
	2007 state of trade survey	44
	Trading conditions	44
	Summary	44
	Leading suppliers	46
3.1	Regatta	48
3.2	Swiss Cutlery/Bollin Group	49
3.3	Berghaus	51
3.4	Jacobs & Turner (Trespass)	52
3.5	Hi-Tec Sports Ltd	53
3.6	The North Face	53
3.7	AMG Group	54
3.8	Coleman	54

3.9	Merrell	55
3.10	Gelert	55
3.11	Hi Gear/Cool Brands	56
3.12	Craghoppers	56
3.13	Bradshaw Taylor	57
3.14	Eurotech Leisure	57
3.15	Helly Hansen	58
3.16	Lyon Equipment	58
3.17	Karrimor	59
3.18	Lowe Alpine	60
3.19	Brasher	60
3.20	Others	61

Sector Four Retail

	Retail distribution	63
	State of trade survey	64
	Market trends	64
	Summary	64
	Retail sales	67
	Number of stores	67
	Retail employment	68
	Employee remuneration	69
	Retail profile	
4.1	Blacks Leisure Group	70
4.2	Snow+Rock	72
4.3	Cotswold Outdoor	72
4.4	Ellis Brigham	73
4.5	Tiso	74
4.6	Rohan	74
4.7	Field & Trek	75
4.8	Mountain Warehouse	75
4.9	Tog 24	76
4.10	Yeomans	76
4.11	Go Outdoors	76
4.12	Nevisport	77
4.13	Oswald Bailey	77

Sector Five Future opportunities

	Participation	79
	Sales	79
	Changing product mix	80
	Retail distribution	80
	Engaging the industry's future	80
	Health	81
	Summary	81

TABLE	PAGE	
1	UK Population 1971-2021	12
2.	UK Population by Age and Gender 2007	12
3.	Top Sports/Recreational Activities	13
4.	Outdoor Sales 2005-2008	19
5.	Outdoor Sales by Product Category 2007	19
6.	Outdoor Clothing by Category by Value 2007	21
7.	Outdoor Footwear Sales by Value 2007	31
8.	Outdoor Equipment sales by value 2007	32
9	UK Outdoor Suppliers by Turnover £25m+	46
10.	UK Outdoor Suppliers by Turnover £10-£25m	47
11.	Regatta Annual Sales 2004-2006	48
12.	Swiss Cutlery (Bollin Group) Annual Sales 2005-2006	49
13.	Burton McCall Annual Sales 2004-2006	49
14.	OSC Annual Sales 2004-2006	50
15.	Bridgedale Annual Sales 2004-2006	50
16.	Berghaus Annual Sales 2004-2006	51
17.	Hi-Tec Sports Annual Sales 2004-2006	52
18.	The North Face Annual Sales 2004-2006	53
19.	AMG Group Annual Sales 2004-2006	54
20.	Coleman Annual Sales 2004-2006	54
21.	Merrell Annual Sales 2004-2006	55
22.	Gelert Annual Sales 2004-2006	55
23.	Bradshaw Taylor Annual Sales 2004-2006	57
24.	Helly Hansen Annual Sales 2004-2006	58
25.	Karrimor Annual Sales 2000-2003	59
26.	Lowe Alpine Annual Sales 2004-2006	60
27.	UK Outdoors Retailers by Turnover 2005-2006	66
28.	Top UK Outdoor Retailer by Number of stores 2005-2007	67
29.	UK Outdoor Retailers by Number of employees 2006-2007	68
30.	UK Outdoor Retailers Employee Remuneration 2005/2006	69
31.	Blacks Leisure Group Annual Sales 2005-2007	70
32.	Blacks Leisure Group 26 weeks to 1 st September 2007	71
33.	Blacks Leisure Group Interim Revenues by Division 2007	71
34.	Snow+Rock Annual Sales 2004-2006	72
35.	Cotswold Outdoor Annual Sales 2004-2006	73
36.	Ellis Brigham Annual Sales 2004-2006	73
37.	Tiso Annual Sales 2004-2006	74
38.	Rohan Annual Sales 2004-2006	75
39.	Field & Trek Annual Sales 2004-2006	75
40.	Mountain Warehouse Annual Sales 2004-2006	76
41.	Mileta/Tog 24 Annual Sales 2004-2006	76
42.	Nevisport Annual Sales 2004-2006	77
43.	Oswald Bailey Annual Sales 2004-2006	77

Introduction

Defining the UK 'outdoor' market is extremely difficult owing to its fragmented nature – there are no clear boundaries on where it starts or stops, or what is or isn't included, figures therefore differ from source to source. Most people however, agree the central core of the outdoor industry essentially revolves around three specific activities namely 'walking, climbing/ mountaineering and camping.

Walking is a natural recreational exercise, promoting physical fitness that is both economical and convenient. It is also the common dominator linking associate activities including hiking (defined as a long walk) and trekking (defined as a journey, including at least one overnight stay). It is also associated with climbing and mountaineering.

The outdoor sector has benefited over the past decade from increased participation. This has come from a more causal approach to outdoor activities, such as skiing, canoeing, mountain biking and more recently scrambling and adventure racing have also been included, the latter introducing a younger generation to the benefits of the outdoors.

Today people want to get away from their urban environment and the outdoors offers the ideal solution.

The UK outdoor market is undergoing massive change. It is currently being pulled in two directions. Recent acquisition activity is fuelling market consolidation. At the same time growth is coming from new consumers and a wider product pool driven by the popularity of outdoor inspired or so called 'urban outdoor' products.

The Profile UK Outdoor Report offers a unique combination of up to the minute statistical analysis based on retailer and manufacturer's surveys combined with individual product sector analysis gathered over the past five+ years.

The report identifies the value of the outdoor sector through its core product areas and associated sub sectors including: Clothing (waterproof, fleece, base and travel apparel), footwear and equipment (rucksacs, sleeping bags, tents and hardware).

There is also a full brand-by-brand analysis of the top 20 suppliers by turnover, current trends, strengths and weaknesses etc together with a profile of the top 15 retailers, number of stores, turnover, employees etc.

Peter Luscombe
Editor