

European Outdoor Group

Annual Report 2023



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This report is best viewed in 'full screen mode' on a desktop, laptop or tablet.

EOG President's Introduction and Executive Summary



2023 was my first full year as EOG President, and the role has certainly proved to be as stimulating, challenging, varied and rewarding as I had anticipated. I was grateful for a comprehensive handover from my predecessor Mark Held, and for the presence of a supportive and committed

EOG Board and Secretariat as I stepped into the role. As the year unfolded, our association and its members once again showcased the outdoor industry's willingness to embrace change, demonstrating dynamic leadership and genuine collaboration on the big issues that really matter.

Our sector continues to tackle the systemic challenges presented to everyone by the climate emergency. At the EOG, for many years now, our CSR and sustainability team has overseen a portfolio of projects to help businesses address matters such as carbon reduction, single use plastics, circularity, data exchange, and incoming legislation. It is because of that long-term work that the outdoor sector is better prepared than many others, for the dozens

of regulations that are in the pipeline. We focus on these projects not only because we have to, but because they are the right things to do.

In this context, it was no surprise at the end of the year that our members overwhelmingly voted to support the proposal relating to the United Nations Framework Convention on Climate Change's (UNFCCC's) Race To Zero programme. I was delighted that we achieved such a high level of engagement, and a decisive and positive result in the vote. Making the commitment to join a Race To Zero initiative by the end of 2024 a mandatory requirement of EOG membership is a big step, and the outcome of the vote is testament to the sustained and comprehensive preparatory work that was undertaken by our team. The result also clearly reflects the impact of our whole CSR and sustainability programme over the years, and of course the commitment of you, our members, to those subjects. Rest assured, we will now work with every member who needs support in preparing to join a Race To Zero initiative between now and the end of 2024.

In 2023, it also felt like we properly returned to face-to-face events. While it's clear that online meetings are here to stay as part of the mix (and rightly so), some of the traditional

rhythm of trade gatherings was back in full effect. Trade shows were already changing significantly before the pandemic, and that needed to happen, but the speed of that has gathered pace. Both the EOG and our partners at Messe Munich recognise that one of the key aspects of the show's recent success at the MOC was the combination of indoor display areas and good use of available space outside, creating a great atmosphere at the show. Details of the next iteration of OutDoor by ISPO will be revealed during the first few months of the year.

Similarly, the European Outdoor Summit is evolving. The event in Berlin was a big success, but we're using the 10th anniversary in 2024 to review and reset aspects of the summit. We've taken on board feedback from EOG members and other industry colleagues who have attended the event, and will build a programme that really focuses in on some fundamental business related issues. The 2024 summit returns to the UK and will be held in Cambridge at the Cambridge Union Society, the oldest continuously running debating society in the world. I am sure that this will inspire some great discussions! As we build the programme, we are excited about working with the faculty from the Cambridge Judge Business School, shaping an event for our industry with the input of teachers from an institution that is so well regarded on the international business stage.

EOG PRESIDENT'S INTRODUCTION AND EXECUTIVE SUMMARY

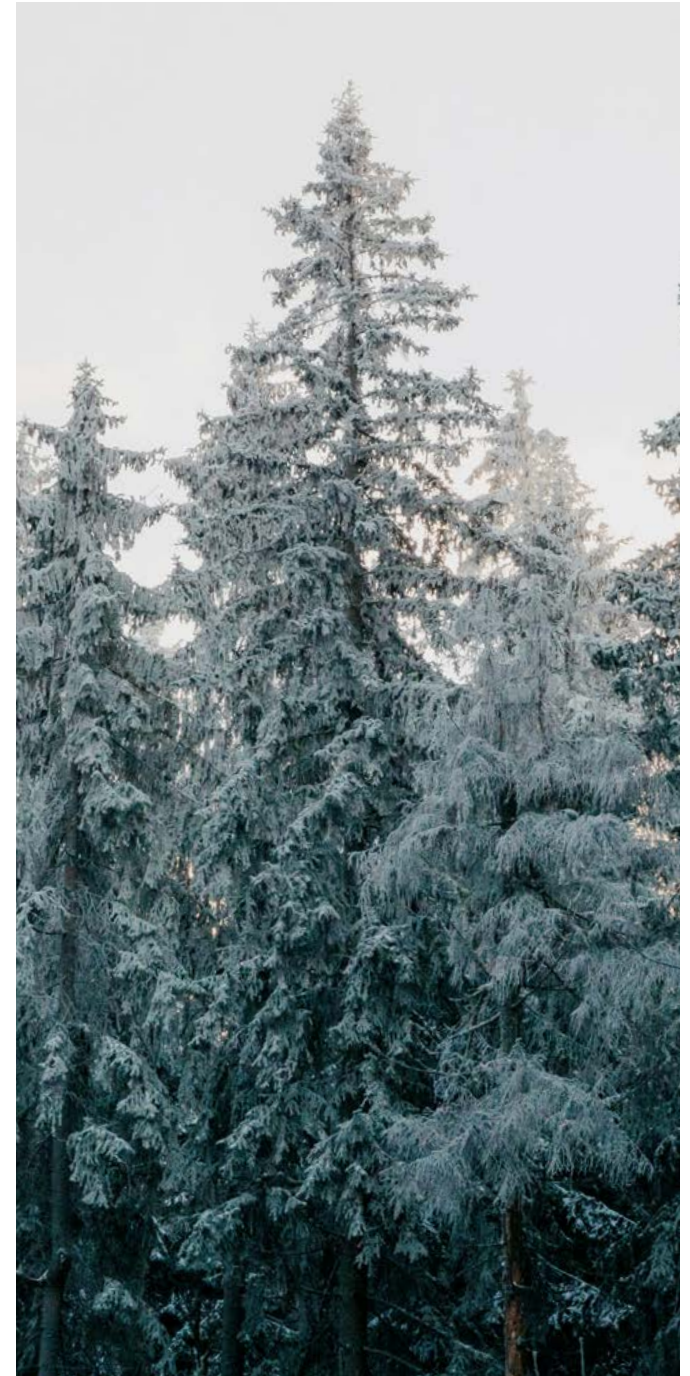
Our market insights programme has always been highly valued by our members, and the whole industry. As the EOG has grown and changed, we have been able to adjust the focus of this work. State of Trade remains a key tool, delivering the most comprehensive sell-in data set that's available, but in 2023, working with our partners at Sporting Insights, we also made big strides in the Outdoor Market Intelligence Service (OMIS), going live with this exciting new sell-through data platform. This was a major development and while it is limited to the UK market initially, we have demonstrated the value of OMIS, and our aim is to extend its reach across Europe in the future. Additionally, we are encouraged to see that many of the advancements from the OMIS pilot will be brought into the State of Trade report for 2024. These updates will bring much anticipated improvements to the sell-in data available to members.

This EOG Annual Report offers an overview from each team about the work that they have done. As always, I hope that it gives you a good insight into the scale of what the association undertakes on behalf of you, and for the good of the industry as a whole. As you know, the success of the EOG is predicated on our founding principles of pre-competitive collaboration. That applies to all of our members, who make such valuable

direct contributions to our various projects. It also applies to the work that we support or undertake with external partners, such as the European Outdoor Conservation Association (EOCA) and the It's Great Out There Coalition (IGOT), and the public affairs activities that we are involved in on many fronts.

In delivering all of the above, and much more, our executive team has shown great ability and commitment, led by our General Secretary Arne Strate. In my role, I have had excellent support from the EOG Board and I am grateful for that. The EOG said farewell to three team members during the year – Pauline Shepherd, Penny Taylor and Peter Ottervanger – and our thanks go to them for their significant contributions to the EOG. Meanwhile, we welcomed Toni Clifford as our new Events Manager, along with 16 additional members. I look forward to working with all of you as we implement a comprehensive work programme during 2024 and beyond.

Matt Gowar,
EOG President.



Managing Committee, Office & Membership

A landscape photograph of mountains at dawn or dusk. The sky is a mix of soft pinks, purples, and greys. The mountains are silhouetted against the lighter sky, with some peaks catching the low light. The foreground is dark and mostly obscured by the silhouettes of trees and the lower slopes of the mountains.

Managing Committee



The Managing Committee for 2023 was comprised as follows:

Matt Gowar (UK) (Equip Outdoor Technologies) President

Paolo Bordin (IT) (AKU) Vice-President

David Ekelund (SE) (Icebug) Treasurer

Achim Loeffler (DE) (W.L. Gore) Member

Marie-Laure Piednoir (FR) (Salomon) Member

David Camps (ESP) (Original Buff) Member

Céline Brunel (FR) (OSV) Member

Jan Lorch (DE) (Vaude) Member

Matthias Gebhard (DE) (Bergfreunde) Member

Andrew Shand (UK) (Helinox) Member

Stefanie Rieder-Haas (DE) (Ortovox) CSR Member (replaced by Katrin Bauer)

Katrin Bauer (DE) (Ortovox) CSR Member

Registered Office:

The registered address of the European Outdoor Group remains as follows:

Gartenstrasse 2, Postfach 7142, 6302 Zug, Switzerland

The domicile address is provided for the EOG by AFL Treuhand und Revisions AG, and is a registered address only.

Membership



By the end of 2023, the membership of the EOG numbered 125 companies and 9 national associations.

The membership committee, in collaboration with the board, will decide the category for each application and all members are required to sign the sustainability charter and align with industry values.

Members:

European outdoor brands, retailers, and technology providers.

Associated Members:

National associations, and other organisations relevant to the outdoor value chain.

Membership Committee

The Membership Committee for 2023 was comprised as follows:

Matt Gowar (President EOG)
Arne Strate (General Secretary EOG)
Paolo Bordin (AKU)
Andy Schimeck (Equip Outdoor Technologies) (resigned mid 2023)
Maria Carme Valls Rebollar (Original Buff)
Mathias Dean-Basedow (Icebug)
Sebastian Keck (Intersport International)

Company Turnover	<€5m	€5-20m	€21-50m	€51-80m	€81-150m	€151-250m	€251-500m	>€500m	NGO/academia
Membership Fee	€1100	€3630	€5170	€6710	€7480	€8250	€9020	€9900	no fees
Associated Membership Fee	€1100	€3630	€5170	€6710	€7480	€8250	€9020	€9900	no fees

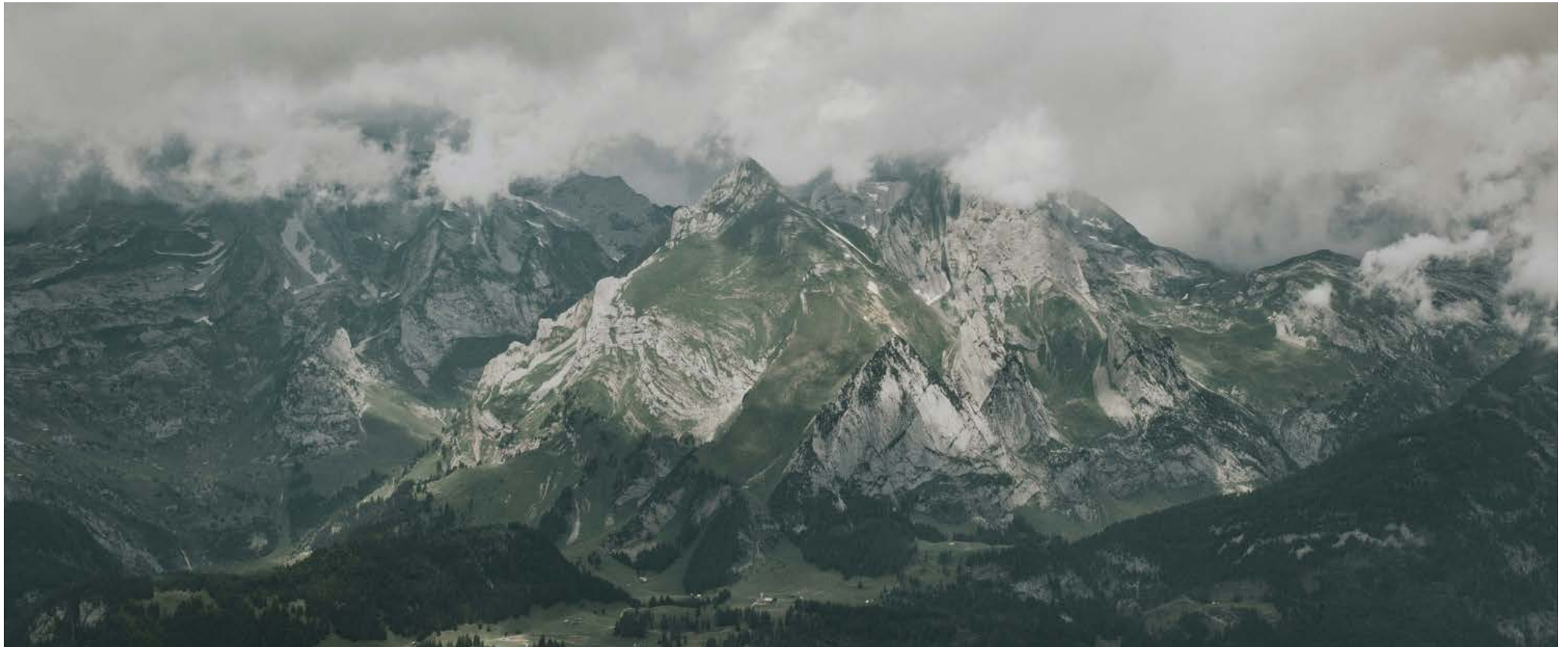


Key Achievements in 2023

Key Achievements in 2023

Early every year, our team presents a programme of activity at the Annual General Assembly, developed to meet the association's overall objectives and aligned to our founding principle of pre-competitive collaboration. Our work is always guided by three aims: Doing business the right way; preserving nature; and promoting participation.

Over the next few pages, you can find summaries of the key work undertaken by our team during 2023. These updates offer an insight into the breadth and depth of our portfolio of projects, but by no means cover everything that we do.



KEY ACHIEVEMENTS IN 2023

There are some key achievements during 2023 that we would particularly like to highlight:

CSR and Sustainability

- We successfully launched Version 1.0 of the Sustainability Data Exchange tool
- Through our Supply Chain Decarbonisation Project, we published a case study, summarising the progress made by the pilot group of 10 brands
- Our Single Use Plastics Project collected, diverted from landfill, and recycled 14.31 metric tonnes of single use plastic (SUPP)
- EOG members voted to join the Race to Zero.

Market Insights

- A restructuring of the market insights programme was completed, to focus its offering and better serve the growing needs of our membership
- We made major progress in a two-year project to update and relaunch the State of Trade report
- In partnership with Sporting Insights, we completed the pilot and officially launched the Outdoor Market Intelligence Service.

Membership Services

- We continued to build membership, across all categories
- During the year, we improved our engagement with members through regular online surveys, and targeted communications
- We extended our programme of webinars on relevant topics to inform and support members.

Public Affairs

- We established the Policy Working Group and held a series of webinars, to both inform members about upcoming legislation, and establish policy positions for the industry
- The EOG CSR and Sustainability team continued to play active roles at a range of relevant partner organisations and NGOs.
- The EOG was active in public affairs within the wider sporting goods context at FESI, with Arne Strate sitting on the board and Katy Stevens serving as the organisation's Vice Chair Corporate Responsibility
- We continued to work with and support the advocacy work of the It's Great Out There Coalition and European Outdoor Conservation Association.



KEY ACHIEVEMENTS IN 2023

European Outdoor Summit and Events

- The European Outdoor Summit in Berlin was well attended by EOG members and representatives from the industry throughout Europe
- OutDoor by ISPO reached capacity at the Munich Order and Convention Centre
- Our booth and stage approach at ISPO Munich was a big success, bringing large numbers of visitors to the area throughout the show.

Communications

- We posted regular updates about our work in the relevant public sections of www.europeanoutdoorgroup.com and members were also able to log in to find more detailed material in our Knowledge Hub
- We continued to add more information and functionality to the EOG website and introduced new standalone platforms for the Impact Accelerator Fund and the Single Use Plastics Project.
- During 2023, we distributed fortnightly 'Executive Update' emails to key membership contacts, along with other direct digital communications from individual teams
- We increased the frequency of our public facing communications through external platforms such as LinkedIn, growing our network substantially and increasing the visibility of the EOG in the process.



CSR and Sustainability 2023

CSR and Sustainability 2023

The outdoor sector continues to face unprecedented social and environmental challenges, and against the backdrop of a rapidly changing climate, our industry, deeply rooted in the appreciation of nature, faces a unique set of trials and opportunities. The past year has witnessed a paradigm shift in the global discourse surrounding climate action, pushing organisations across all sectors to address this topic with the urgency that it requires.

Our commitment to CSR and sustainability remains a cornerstone of EOG outputs and the team continues to provide educational programmes, opportunities to participate in projects, and direct impact opportunities, as well as representing the industry and mitigating risk, and cultivating CSR partnerships and networking opportunities.



Race To Zero

Climate has been a big focus of the last year for the EOG, and we have worked towards identifying the full potential of our role as an industry association, in addressing the emergency. In an effort to accelerate the activities of the membership on this crucial topic, a proposal was made to make a commitment to a Race To Zero initiative a mandatory requirement of association membership.

The Race to Zero is a global campaign, that was launched in June 2020, by the United Nations Framework Convention on Climate Change, the UNFCCC. The Race to Zero assembles and verifies a coalition of leading net-zero initiatives which must meet robust science-aligned criteria. The proposal made to the membership would require them to join one of these initiatives before the end of 2024. As a very significant step, it was necessary for this proposal to be voted on by the EOG membership.

In preparation for the vote, a comprehensive schedule of presentations and discussion sessions were rolled out, providing key information, and allowing members to raise concerns and ask questions, ultimately enabling them to

vote with confidence and an understanding of the true implications of their decision.

The EOG Race To Zero voting took place in December over a period of over three weeks, allowing ample time for members to consider their position and express their views. In a process that was open to full voting members of the association (not associated members), 88% of those who voted were in favour of the proposals.

The high level of engagement in the Race To Zero debate, and ultimately the positive result, demonstrate how seriously members take this topic.

We still have a considerable amount of work to do to expedite the necessary activity in this area, and we are addressing this in our comprehensive offering of climate related projects, education and other opportunities. However, we believe that we have the potential to support our members through the unavoidable transition to not only fulfil our responsibility as stewards of the environment, but also to contribute meaningfully to a sustainable and equitable future for all.



Supply Chain Decarbonisation Project

Further progress has been made in this project, which aims to reduce greenhouse gas emissions and increase renewable energy usage within the outdoor industry supply chain.

In late 2023, a [case study](#) was published, summarising the progress made by the pilot group of 10 brands. Working with the Apparel Impact Institute (Aii) and RESET Carbon, the project team gathered data from 16 manufacturing facilities and established that their combined CO₂ emissions totalled almost half a billion kilogrammes in 2021. This group is now tracking facility progress against action plans and researching opportunities to collaborate further on joint mitigation actions, focussing on solar or fuel-switch projects.

The second project cohort has nominated a further nine facilities, for which the first stage of the Carbon Leadership Programme has recently been completed, and they are now jointly deciding which of these will proceed to the second stage of the programme for more detailed assessment. As with the pilot group of brands, early feedback suggests that participants appreciate working together and sharing costs in this way.

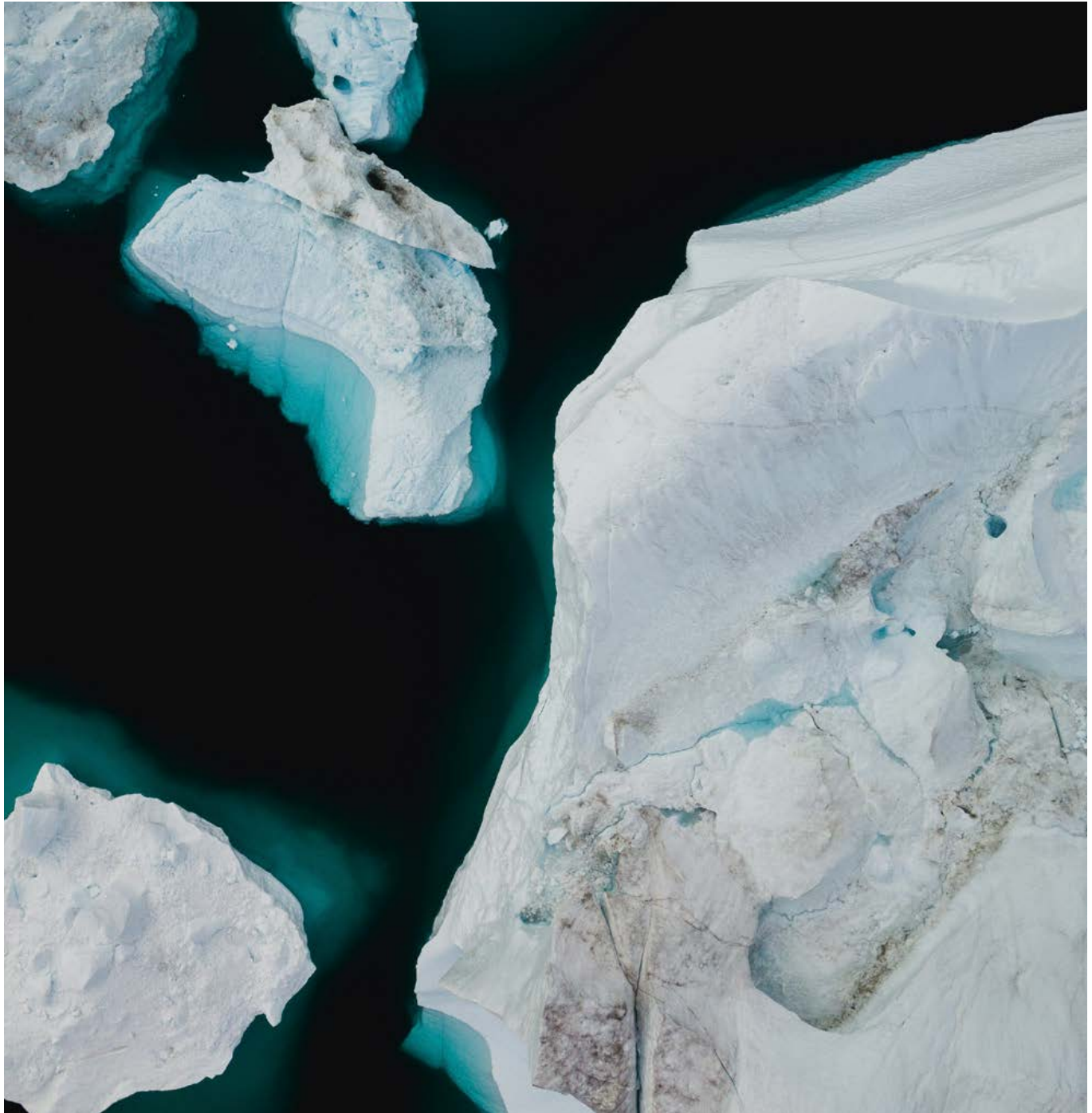
2024 will see the commencement of the project expansion into hardgoods, with the first meeting scheduled for mid-January. This workstream will require a slightly different approach, in terms of facility mapping categorisation and service providers, due to the complexity of the hardgoods industry. We also hope to expand the project to address footwear facilities.



Outdoor Retailer Climate Commitment

The ORCC was founded in September 2021 as an initiative of European outdoor retailers and, in 2023, new members were welcomed to the group. This open network for better climate protection in the outdoor industry, brings retailers together who collaborate to promote climate protection and take targeted measures to achieve the Paris climate targets.

In November 2023, the second annual report was published and the results show that all members have reviewed their Scope 1 and 2 emissions and drawn up an action plan to reduce their direct emissions. In 2022, progress was made, as a total of 12,843 tonnes of CO₂e was reduced across all members' direct emissions (Scope 1 and 2) compared to their baseline years. The report highlights that the majority of members have signed up to the Science Based Target initiative (SBTi) framework, many are creating reduction plans across all three scopes, and some are putting supplier engagement targets in place. In 2023, the ORCC also developed a database of brands and manufacturers, gathering publicly available information on their climate targets, actions and emission reductions, in order to track the progression towards the supplier engagement targets.

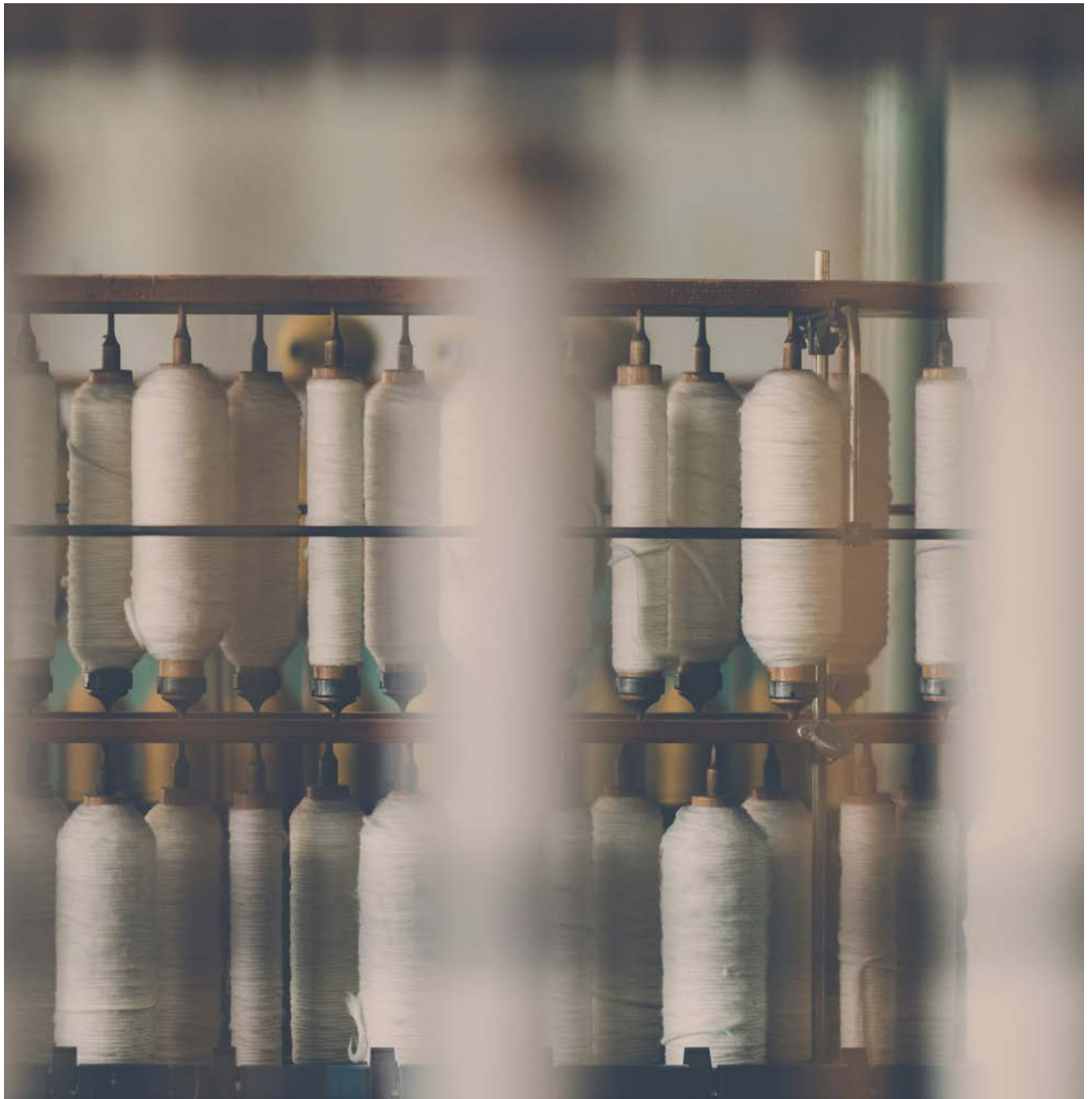


Policy

Policy development continues to put pressure on the industry and is in some cases prohibiting progress, as organisations are waiting for legislative guidance before embarking on more ambitious sustainability initiatives.

Support of the membership has increased over the last year, particularly from a business readiness and implementation perspective, through the delivery of a series of webinars, policy mapping, and the dedicated Policy Working Group. These outputs have been designed to enable members to identify and develop appropriate resources and systems to help them to meet current and future legal requirements.

This work will grow over the coming year with an additional focus on advocacy, with the upcoming EU elections providing a perfect opportunity for the industry to develop and communicate its position on critical topics.

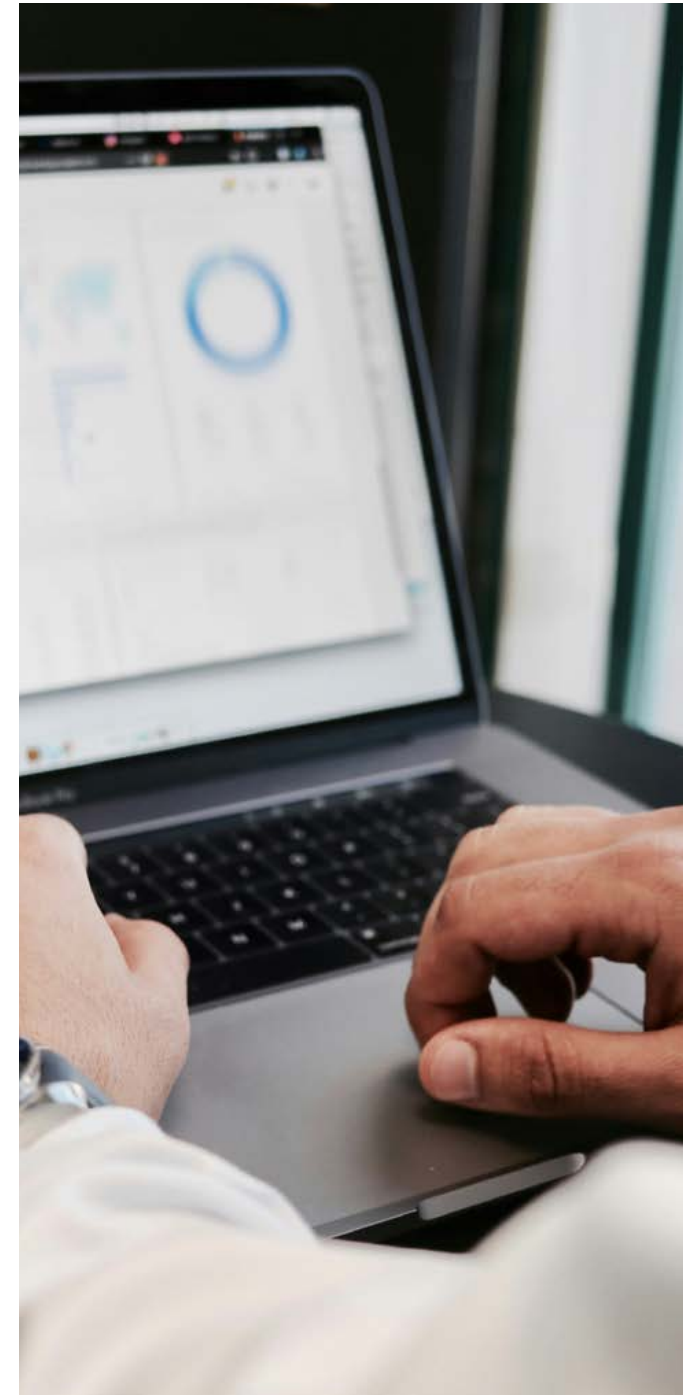


Sustainability Data Exchange Project

The SDEX project, an industry approach to harmonising the exchange of product level sustainability data between brands and retailers, has moved quickly over the last year and reached several significant milestones.

Working collaboratively with our colleagues from the Bundesverband der Deutschen Sportartikel-Industrie (BSI), during the first half of the year, a harmonised data exchange tool was developed and underwent multiple rounds of testing and improvement, through engagement with a dedicated group of 10 retailers and 12 brands. The tool with supporting resources went live in July 2023, to coincide with ordering cadences, with over 200 individuals registering for the launch.

The SDEX questionnaire was well received by members, and the wider industry, and a number of retailers have already adopted it as their method of data collection, engaging multiple brands in the process. Several other industry projects pilot testing the questionnaire have emerged, and we continue to receive positive feedback and are aware of general sector movement around a wider adoption of the tool. This work will continue into 2024 with updates to the tool as well as wider dissemination to facilitate increased adoption.



Single Use Plastics Project



Since its initiation in 2019, significant changes have been made to the Single Use Plastics Project, making it even more accessible, while maintaining the ethos, reputation and impact of the project. A pivotal member-vote, held in late 2023, cemented the continuing need and desire for this project to continue, as it provides brands, retailers and packaging organisations with access to a network and specifically developed resources to address the design, use and end-of-life treatment of their poly bags. In addition to the outputs of 2023, several additional project outcomes have been delivered:

1. The Poly Bag Standards document, first launched in 2022, was updated in 2023 to include more detailed guidance on both recycled LDPE specifications and the tried-and-tested 'pillowcase' design.
2. The Project Report, also published in 2022, was updated in 2023 to include data on the environmental gains of using recycled LDPE versus virgin material, as well as updated consumer feedback on naked deliveries.
3. A new document, the Project Recommendations Guide, was published in autumn 2023 and is an excellent starting point for those who know they want to do something, but don't know where to start. This document signposts users towards the relevant resources for specific poly bag topics, highlights which products can be shipped or received without poly bags currently in the industry, and answers frequently asked questions.
4. The UK Recycling Network has continued its collections and, in 2023, a further 14.3 tonnes of plastic were diverted from waste (landfill/incineration) and recycled. The research into the waste treatment system in the Germany/Benelux regions was completed and from this, further guidance will be developed.

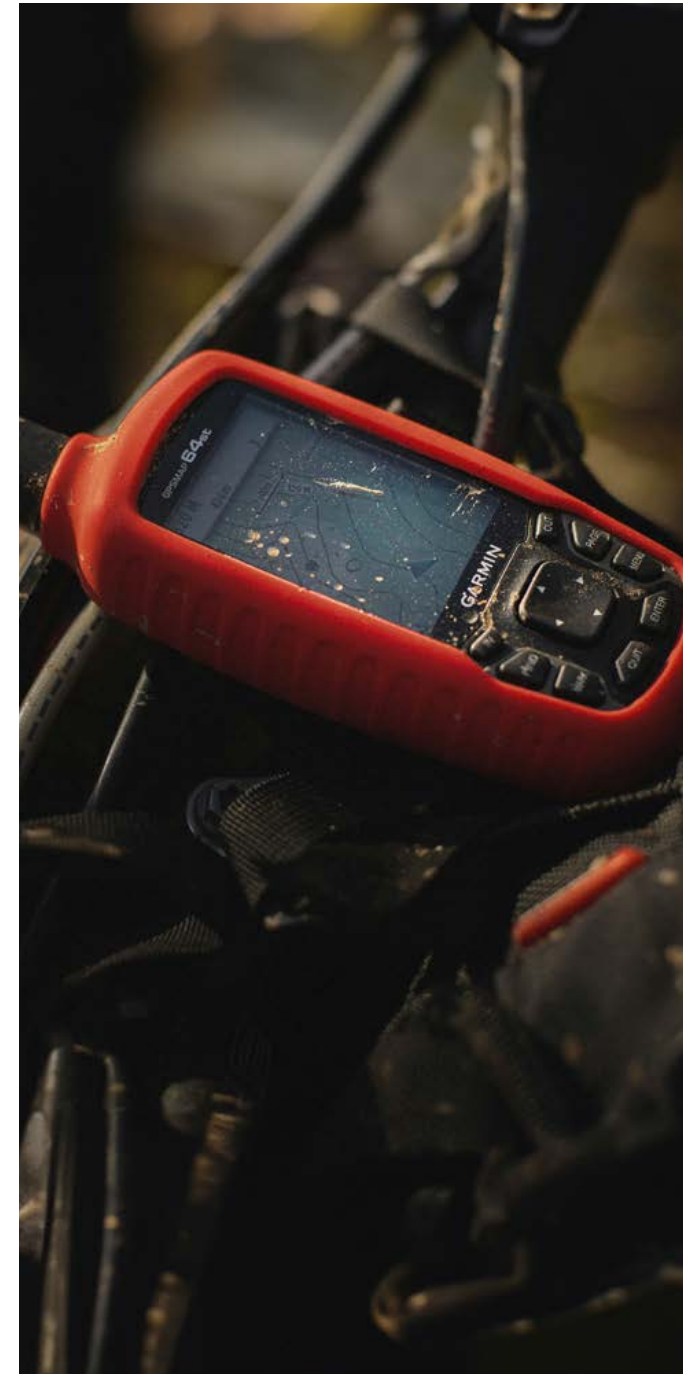
In 2024, the project will continue to develop resources required by the industry, starting with retailer-specific guidance, and provide access to relevant data and recycling opportunities for organisations, at a significantly reduced cost.

Hard Goods Work Group

The Hard Goods Work Group has had another strong year, with high levels of engagement and some very motivating sessions. Supported by Peak 63, the group offered workshop sessions on traceability and repair. Peak 63 shared some of its own mapping work of traceability tools currently available to industry and a lively discussion session was had around this fast-evolving market. Similarly on repair, the group was joined by Decathlon which presented its Repair Index.

2023 saw the Electronics Workshop becoming a firm fixture on the hard goods agenda. After the initial success of a round table held in the latter part of Q4 of 2022 to discuss the subject and introduce stakeholders, two workshops were tabled for 2023. Repair specifically for electronics was discussed, with content and discussion from FairPhone, after a kick off session on LCAs for electronics. Both sessions produced plenty of questions and lively debate and further sessions during 2024 are now being planned.

The Audit Alliance for Hard Goods had a challenging year during 2023. It opened with a number of promising interactions with stakeholders identified to potentially offer in depth audits, with a focus on migrant labour and remediation and the repayment of fees. However, people resource across the auditing teams continued to affect timelines and eventually the year was rounded out with the workstream collapsing just as audits were due to get under way. Despite this sizeable setback, the group rallied strongly with a new strategy and developed a clear roadmap for activities to be undertaken during 2024, including worker survey development and a strategy for remediation.



Accelerating Circularity Project Europe

After more than two years, the first stage of the Accelerating Circularity Project Europe (ACPE) will come to completion in March 2024. This project has been an important journey for the EOG in terms of circularity and in many ways offered a natural extension to the Horizon 2020 DEMETO project that the association was part of back in 2018. One of the key learnings from the DEMETO Project was that developing the right recycling technologies is only part of the challenge faced when attempting build a circular system. Circularity is a team sport and bringing together the range of stakeholders from across the value chain to further develop textile to textile recycling was a critical next step. The group convened by ACPE remains its standout success and the relationships and learnings from this will no doubt continue to be key to developing a circular industry for many years to come.

2023 was dominated by the undertaking of physical trials, taking polyester and cotton feedstock through the collection and sorting process, their respective recycling processes, spinning, and finally fabric formation. The aim remains that the fabrics produced from textile-to-textile recycling through this project will make it into collections across Europe in the coming seasons.

Finally, it is worth noting that alongside the recycling pilots, ACPE has investigated a wide variety of aspects relating to circularity, including holding dedicated work groups for waterproof garment and footwear recycling, and developed numerous resources, including a directory of recyclers and a playbook for textile-to-textile recycling. Going forward, we look forward to seeing these learnings drive change in this sector.



Educational Provision

2023 saw the EOG return to presenting a full programme of CSR and sustainability focused presentations at OutDoor by ISPO and ISPO. Over the course of 2023, the team delivered 29 presentations at the shows, with further contributions at EOS.

Externally, the CSR and Sustainability team presented the outputs of the organisation and represented the wider sector in a number of engagement opportunities with external stakeholders. Katy Stevens shared the work of the EOG at two Performance Days events, as well as delivering multiple sessions at the Atomic Ski Industry Climate Summit, while Jane Turnbull presented the EOG's contribution to the development of the Higg FEM module and the importance of collaboration at Planet Textiles. The team also contributed to several events hosted by our partners and national associations, including the Scandinavian Outdoor Group (SOG), the Outdoor Industries Association (UK), and the Outdoor Industry Association (USA).



Engagement With Third Party Organisations

Partnerships and close collaboration with external stakeholders remains an important aspect for the EOG, to ensure that our knowledge is up to date, to enable us to bring the best available information to our members, and to make sure that our outputs are complementary and not repetitive of other industry initiatives.

The EOG has continued to build new and nurture existing relationships over the last year, as well as represent the European outdoor sector with several partner organisations:

- Federation of European Sporting Goods Industry (FESI) (Arne Strate, Board Member)
- Federation of European Sporting Goods Industry (FESI) (Katy Stevens, FESI Vice Chair Corporate Responsibility)
- Fair Wear Foundation (Mark Held, Executive Board)
- The Microfibre Consortium (Katy Stevens, Technical Committee)
- Accelerating Circularity Project Europe (Jane Turnbull, Steering Committee, member of Brand and Retail Working Group, and Leading Waterproof and Apparel focus group)
- Higg Co (Partnership that includes discounts, and targeted and personalised support for EOG members)
- Textile Exchange (Complimentary Membership in recognition of services to the industry)
- WRAP Textiles 2030 (Affiliate Signatory)
- Sustainable Apparel Coalition (member)
- Aluminium Stewardship Initiative (member)
- Responsible Steel (member).

Market Insights



Market Insights

The European Outdoor Group's market insights department aims to be the authoritative source of European outdoor market data and insights. We quantify the industry via retail monitors, the State of Trade (SoT) sell-in report, and consumer and industry development trends. In 2023, we saw several changes and advancement in our data offering and programme. Noticeably, the department has undergone significant restructuring to focus its offering and better serve the growing needs of our membership. This has included a significant consolidation of agreements with third-party data partnerships.

The market insights department's focuses can be categorised into three central outputs: Sell-in data; sell-out data; and consumer trends.

The sell-in data has always been served by the State of Trade report, which has continued to be a core service to members for over ten years, in assessing the movements of the outdoor industry wholesale values.

Sell-out data has been a rapidly emerging topic for the EOG and is now a significant investment focus, for 2023 and into the coming years. While the EOG will continue to offer the Retail Barometer, a sell-out assessment of a focused group of German retailers, 2023 saw the uplift of the Outdoor Market Intelligence Service (OMIS), a very comprehensive sell-out pilot in the UK.

Lastly, consumer research and broader market trends have traditionally moved forward through the relationships cultivated by the EOG. In the past, this has included research undertaken in partnership with Foresight Factory, the It's Great Out There Coalition, Statista, and more. However, for 2023, the consumer behavioural trends and assessments were deprioritised, but not eliminated for the long-term, to ensure a concerted focus on answering the primary ask from the trade, which was for sell-out data across Europe.

State of Trade Report

Well over a decade since its initiation, the State of Trade is undergoing a two-year plan that started in 2023, to update and relaunch the report. The report provides sell-in, or wholesale, data to the members of the EOG and contributors to the report. State of Trade covers products sold by over 100 outdoor companies in Europe in the apparel, footwear and hardware markets, and also includes outdoor sell-in figures from multisport/lifestyle brands. It is well-established as Europe's premier market data programme for the outdoor sector, providing wholesale sales data which is anonymised, aggregated, statistically evaluated, and then published to an online portal. The report provides data spanning multiple countries and geographies, split into product types and sub-categories.

New for 2023, external factors, including the removal of an entire market (Russia) and the addition of significant new data contributors such as Decathlon, had a meaningful impact on some of the underlying assumptions made during the data analysis. For this reason, the 2022 report also included the prior year's report rerun with the same dataset previously used, but with the new assumptions for the year retroactively applied to ensure the changes in the sales figures could be compared year on year.

Furthermore, with the advancements in the Outdoor Market Intelligence Service during 2023, several key updates were identified for the future iterations of the report. These include improvements to the product taxonomy, the processes of submitting data, and a significant reduction in the distance between reporting and publishing. After the significant work undertaken by the OMIS data work group, which comprised over 30 contributing organisations within the trade, we were able to replicate the product categorisation developed for the sell-out reporting and will apply it to the subsequent State of Trade reports, starting in 2024. Furthermore, the OMIS data submission portal can be duplicated, allowing us to receive standard sales reports going forward. Using standard sales reports as opposed to manually generated spreadsheets, will reduce submission time, potential human error, rechecking and validating datasets, and potentially increase the number of submissions per year.

With these advancements in 2023, we aim in to release the next State of Trade report by November 2024, including the new product taxonomy aligned with the sell-out reporting, using the new data submission process to greatly increase the value of and confidence in the report.



Outdoor Market Intelligence Service

The largest shift in the investment of the EOG in terms of data projects has come in the form of the Outdoor Market Intelligence Service (OMIS). OMIS has been developed in partnership with Sporting Insights and is co-owned by the two organisations. OMIS specifically aims to bring sell-out data, or retail sales by brands and retailers to end-users, to the market. The UK is the first geography where we have developed and tested the service, and 2023 saw significant progress in this, with the introduction of an industry wide product taxonomy, external engagement with other product classification tool providers to define activity-based language, and sufficient market coverage in terms of retail sales to proceed with the launch of the service.

Before the service could be launched and useful to the industry, we needed common language and definitions around how to segment and size the product being sold to end users. Many retailers and brands used a mixture of descriptive language, activity or sport-based language, and proprietary language. While this can be useful in capturing market share or segmenting consumers, it makes it extremely difficult to size sales volumes and ensure there has not been any double-counting or misclassification of product. To address this, we brought together a group of over 30 brands and retailers to create common ground around product

classification. We worked across multiple nationalities, even extending outside of Europe to ensure the most durable outcomes for the taxonomy. The work was incredibly successful and the classification is being adopted outside of the data programmes and into various other potential use cases, where outdoor products need to be organised in a democratic and balanced way.

With a strong product taxonomy based only on descriptive language, we were able to proceed with the next largest ask from the trade, which was to incorporate activity-based nomenclature. We partnered with the European Federation of Sporting Goods Retail Associations (FEDAS) and the Sporting Goods Industry Data Harmonization Organization (SGIDHO) to work towards aligning our activity list with theirs. This allowed us to leverage pre-existing trust and experience within the industry, show good faith to our long-standing partners, and encourage the industry to define activities in a way that would service the sector even in externally facing contexts. Beyond engendering trust and confidence in the outcomes, by working with existing product classification tools, we can extract data for OMIS with a lot less input from the brands, making sure they can receive more detailed and nuanced data with far less work up front to integrate activity-based definitions into their product lists.

Lastly, and most importantly, 2023 saw OMIS onboard a steady stream from a diverse and encouraging retailer base to input data. Contracts are now in place and data is flowing from multiple sizeable generalist retailers, independent and specialty retailers, online-only retailers, and brands with direct-to-consumer channels in the UK. With the current retail base, we estimate more than 60% market coverage of the UK in terms of sales with onboarding continuing regularly. 2024 will see us reorient our attention to focus even more on developing the independent and specialist channel.

Towards the final month of 2023, a decision was taken to recategorise the footwear department. Although this set the official launch back into the first month of 2024, the decision was not taken lightly or without input from our partners at Sporting Insights. Ultimately, the guiding principle which motivated this decision was to ensure that the service will be more fit for international expansion, a widely communicated ambition of the EOG and Sporting Insights. Making these adjustments when we did cost us a few weeks that would have otherwise impeded our long-term ambitions. That work has since been completed, and the reporting tool is set for a very buoyant year in 2024.

In Conclusion

We see industry data as a core identity of the European Outdoor Group and are excited for the upcoming changes to our flagship report, the State of Trade, and forthcoming expansion of the sell-out service, OMIS. As other adjacent industries become increasingly sophisticated in their use of data, we feel it incumbent upon the association to equip the trade with the necessary tools to make dynamic and capable business decisions based on reliable evidence.



Public Affairs



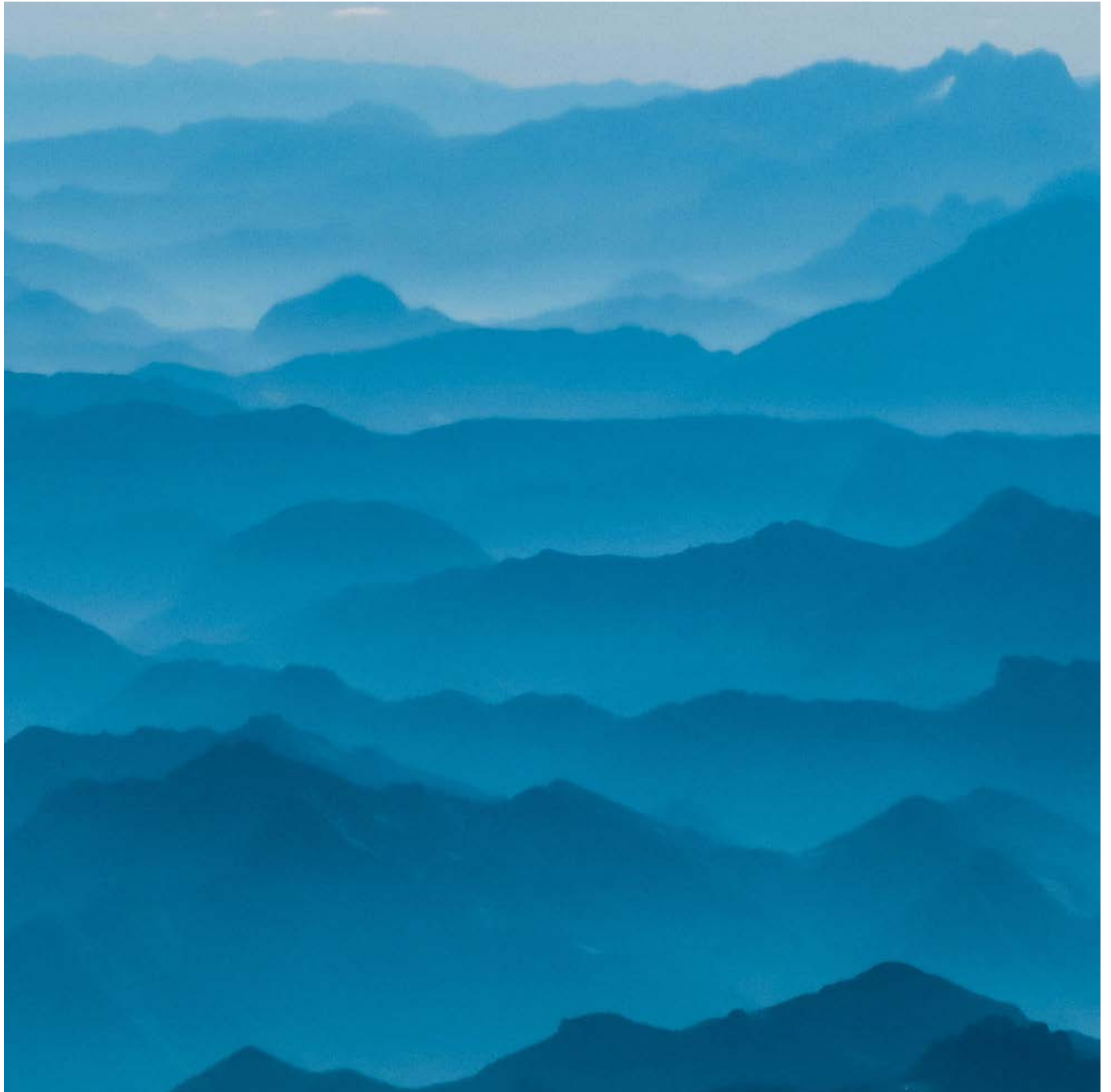
Public Affairs

Our public affairs work in 2023 remained focused on representing and promoting the outdoor sector through European-wide networks, and ensuring that our industry has an influential voice in the development of policy.

The legislative landscape in Europe regarding Corporate Social Responsibility (CSR) and sustainability policy is evolving rapidly. Our team has been actively engaged in contributing to significant position papers, identifying upcoming initiatives, and disseminating the latest insights among our members. This effort aims to empower members in addressing both existing and forthcoming regulatory demands.

The Policy Working Group remains a pivotal part in our ongoing public affairs outputs. For a more comprehensive overview of our work in CSR and sustainability policy, please refer to the dedicated [section](#).

Our public affairs work was done directly, in collaboration with partners such as the Federation of the European Sporting Goods Industry (FESI) and the Fair Wear Foundation (FWF), and through the efforts of colleagues at the It's Great Out There Coalition.



PUBLIC AFFAIRS

FESI

Arne Strate continued on the FESI Board and Katy Stevens as a Vice Chair of the Corporate Responsibility Steering Committee. We contributed to FESI's well established work streams across a range of topics that are relevant to our industry, maintaining a vital link with the wider sports industry and with the legislators and politicians of the European Community. FESI was active on many fronts during 2023, and we ensured that the outdoor sector had a voice in those efforts.

As well as the roles above held by Arne Strate and Katy Stevens, the EOG currently has the following representatives on FESI committees:

- Product Compliance Steering Committee – Dr Katy Stevens
- Corporate Responsibility Steering Committee – Dr Katy Stevens
- Digital Steering Committee – Arne Strate
- Trade Steering Committee – Arne Strate
- Sport Steering Committee – Arne Strate.

FWF

The trend of more EU legislation on basic CSR issues continued during 2023. Through our work with FWF (and FESI), we remained well placed to engage with policy makers on these matters and effectively represent the interests of the European outdoor industry.

As well as the above roles Arne Strate is also a board member for the European Network of Outdoor Sports (ENOS) and It's Great Out There coalition.

Membership Services



Membership Services

The European Outdoor Group is founded on the belief that co-operation in the pre-competitive arena is key to a prosperous and sustainable outdoor sector. We are proud of this spirit of co-operation and during 2023, our role has continued to broaden to support all our members, which are now from right across the supply chain.



MEMBERSHIP SERVICES

As of the end of 2023 we have 125 members and 9 national associations.



Growing the Membership Base

We have put a focus on efforts to actively grow our membership base. Our vision is to be relevant to the entire value chain and lead the European outdoor industry agenda for all who operate within it.

Throughout the year, we presented our proposition and discussed the benefits of being an EOG member with a range of businesses, including suppliers, creative agencies, test houses, 3PL organisations and universities. We presented a packed programme at OutDoor by ISPO, ISPO and at the European Outdoor Summit, and gained 16 new member organisations through the year.

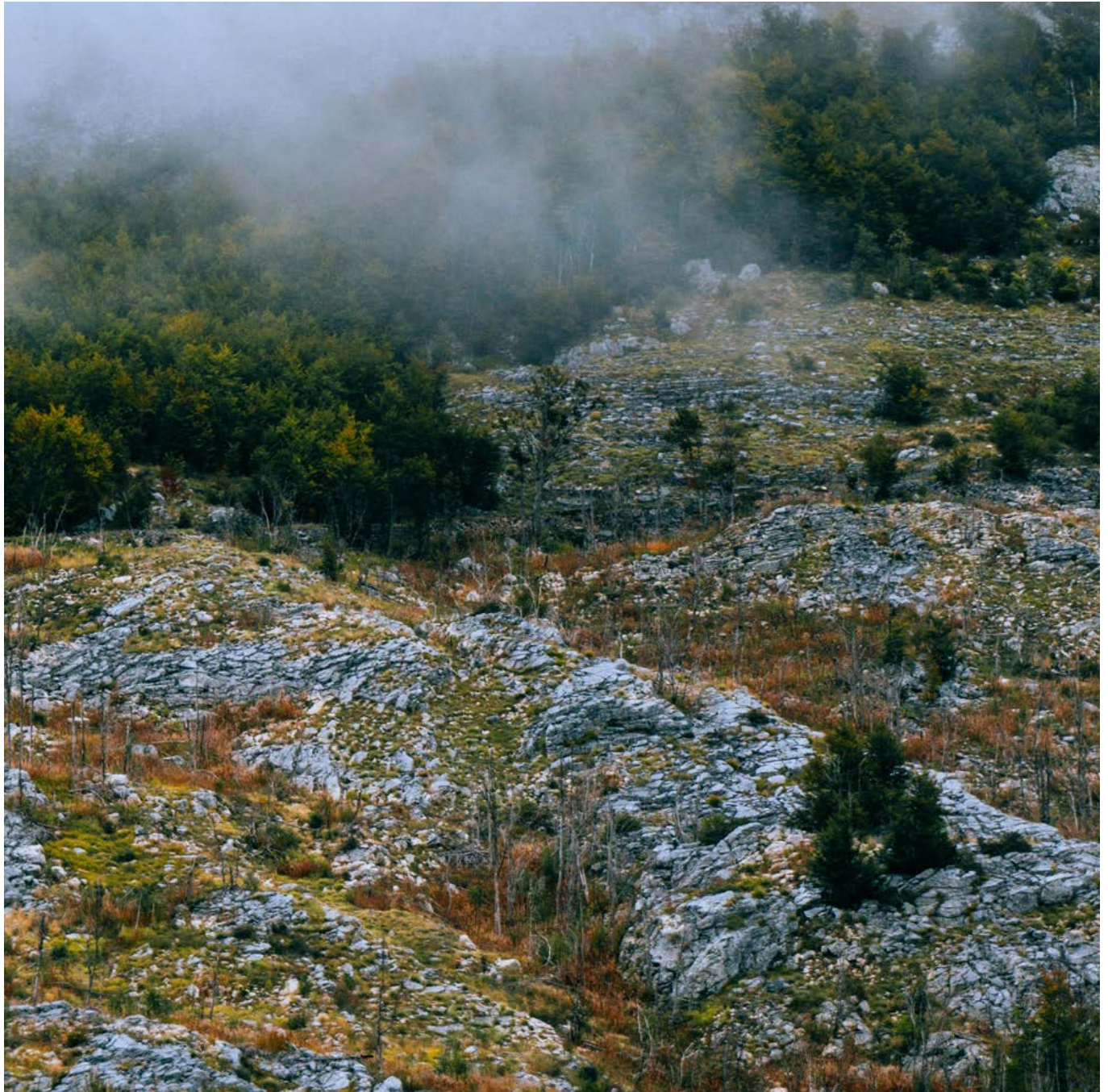


Membership Services

We recognise that the needs of members vary across different parts of the supply chain, and we have continued to explore new ways to support and service our existing and new members, while providing the best benefits to the wider supply chain.

Throughout 2023, we regularly surveyed our members and gained feedback across a range of topics, including trade shows, overall satisfaction of membership, and events like the European Outdoor Summit. This activity will allow us to improve and adapt our work to best suit the membership.

We distributed regular updates by email to members, with tailored content for different individuals and teams. Along with established platforms such as the 'Executive Update', we also proactively engaged with members on a range of key topics, through both written communications, and at interactive sessions such as webinars.



European Outdoor Summit and Events



European Outdoor Summit and Events

The 2023 edition of the European Outdoor Summit (EOS) took place in September at the eclectic Festsaal Kreuzberg venue in Berlin. High calibre industry leaders from across Europe were greeted with sunshine as they attended the two-day event, to learn, network and shape the future of the European outdoor industry.

The EOS agenda was built around the theme ‘The New Era - Business and Beyond’, and featured an impressive line-up of speakers, bringing their industry insights, thoughts and expertise to a range of topics, including transformative change, market insights, circularity, and data in sustainability.

In tackling all of the big issues that we discussed during the event, it was clear that the best solutions can be found by working together. The European Outdoor Summit is a living, breathing case study of that in real time, one that emphatically demonstrates the power of collaboration.

We worked with our sponsor, myclimate, to calculate the CO2 footprint of the event. We retired 135 tonnes of CO2-emissions and used our climate protection contribution to support a project voted for by EOS 2023 participants.

At other events during the year, the EOG delivered full and varied programmes, enhancing our direct engagement with our own members and with the wider industry, and introducing elements in keeping with some of the successful content that features at each EOS.

We have reviewed feedback from EOS 2023 and have partnered with content providers to develop a business focused programme for EOS 2024, that will complement our existing strong and robust CSR and sustainability content. We look forward to welcoming colleagues to Cambridge in the UK from 18th–19th September 2024 for the 10th anniversary of the European Outdoor Summit.



EUROPEAN OUTDOOR SUMMIT AND EVENTS



A close-up photograph of a pine branch. The branch is covered in dense, green, needle-like foliage. A small, orange caterpillar is visible on the upper left part of the branch. The word "Appendix" is written in white text over the image.

Appendix

Appendix i: Accounts

Income and expenditure account for the year ended
31 December 2023

Operating Income	2023	2022	
Membership Subscriptions	€ 704,845	€ 595,640	
Commission Earned	€ 800,000	€ 600,000	
Misc Income	€ (141)	€ 900	
Market Research income	€ 5,000	€ -	
EOS	€ 56,000	€ 126,836	
CSR income	€ 8,397	€ 105,103	
DEMETEO (EU Project)	€ -	€ 20,116	
SUPP	€ 63,039	€ 52,347	
Total		€ 1,637,141	€ 1,500,942
Central Expenses			
Travel Costs	€ 29,514	€ 14,224	
Payroll	€ -	€ -	
Accountancy	€ 6,968	€ 4,884	
Subscriptions	€ 16,768	€ 23,530	
Bank Charges	€ 4,940	€ 3,570	
HR Costs	€ -	€ -	
Legal & Professional	€ -	€ 3,326	
Miscellaneous Expenses	€ 3,886	€ 2,322	
Direct operating costs	€ 989,331	€ 871,060	
Total		€ 1,051,408	€ 922,916
Development Expenses			
EOS	€ 99,933	€ 99,811	
Promotion of Outdoor Participation	€ 20,000	€ 20,000	
Conservation of Nature	€ 20,000	€ 21,650	
Marketing and Communications	€ 52,389	€ 67,200	
CSR & Sustainability	€ 104,007	€ 227,893	
Market Research	€ 225,233	€ 106,809	
Projects	€ 40,014	€ 53,364	
Total		€ 561,575	€ 596,726
Total Income		€ 1,637,141	€ 1,500,942
Total Expenses		€ 1,612,983	€ 1,519,642
Net Income		€ 24,158	€ (18,700)

Appendix ii: Balance Sheet

Balance Sheet at 31 December 2023

Chart of Accounts:

Default Layout of Accounts

		2023		2022
	€	€	€	€
Fixed Assets				
Software	0.00			26,640.00
		0.00		
Current Assets				
Debtors	443,094.49		301,794.00	
Prepayments	0.00		56,599.00	
Sterling Account	0.00		4,653.00	
Bank Account	234,968.95		305,975.00	
		678,063.44		668,982.00
Current Liabilities				
Creditors : Short Term	105,019.92		2,500.00	
Bank Account			144,237.00	
		105,019.92		146,737.00
Current Assets less Current Liabilities:		573,043.52		548,885.00
Capital & Reserves				
Reserves	548,885.30		567,586.00	
P & L Account	24,158.22		-18,700	
		573,043.52		548,885

Appendix iii: Audit Report

Independent examiners report to the members of the
European Outdoor Group

I report on the accounts of the European Outdoor Group for the year ended 31st December 2023, as prepared by Ingalls Chartered Accountants.

Responsibilities and basis of report

The directors are responsible for the preparation of the accounts.

I report in respect of my examination of the Association's accounts and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission.

Independent examiner's statement

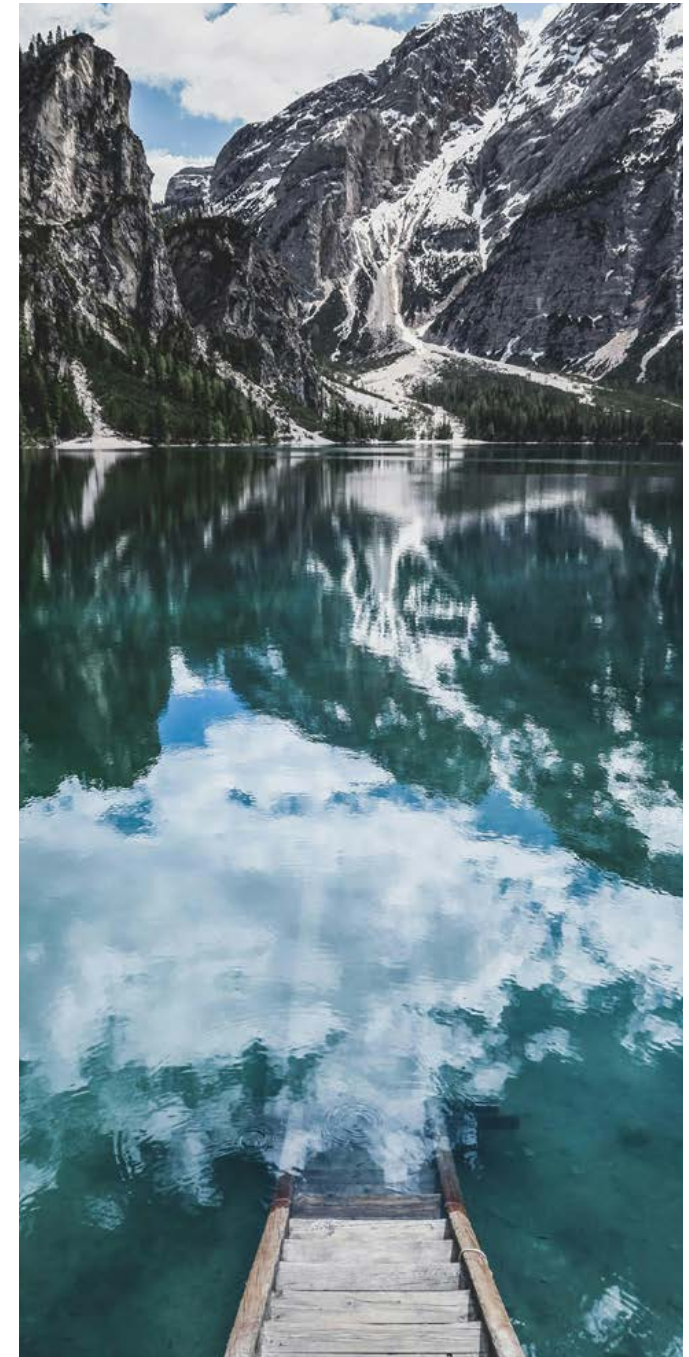
I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the charity; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.

H Holmes FCA
Chartered Accountant
Stables Thompson & Briscoe
Lowther House
Kendal
LA94DX

Date: 5 February 2024





EUROPEAN
OUTDOOR
GROUP

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