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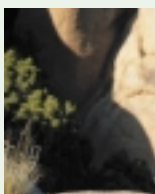


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EOG - should you join?

# Welcome to the first newsletter of the EOG.

## The EOG - what is it and why do we need a new trade association?

EOG stands for the European Outdoor Group and it's a very exciting initiative – an association set up to represent the common interests of the European outdoor industry.

Originally founded by nineteen of the world's largest Outdoor companies and with a current membership of twenty five brands, this group recognised the need for a cohesive, cross border approach to representation of the outdoor sector. We live in a world of increasing internationalism, where legislation, environment, the media and trade are all now multinational issues. The combined strength of the 25 member brands, and a close co-operation with national outdoor associations, provides us with an extremely powerful force to represent the European outdoor industry in a constructive and positive manner.

Over the last two decades, the outdoor industry experienced an exceptional growth and has become one of the, if not "THE" major player in the sporting goods business. In order to strengthen this position, the EOG undertakes a number of efforts that will prove to be beneficial to the European industry. Amongst our first initiatives is a proposal for a representative market survey to gain reliable market data, we are also organising workshops during OutDoor Friedrichshafen, which we believe, will prove to be another valuable support to the entire industry.

It is important that the EOG is as representative of the wider industry in Europe as possible and we actively encourage international brands to join.

We're working for your industry and if there are issues you feel need to be addressed, don't hesitate to contact us, this is your association and we're here to help.

We look forward to working with you to ensure the prosperity of the European outdoor industry.

Yours truly,



**Rolf Schmid**  
President, EOG  
CEO, Mammut Sports Group

# EOG & Friedrichshafen OutDoor - a Partnership for the Future



**Having effective trade shows is a vital part of any industry sector, and with this in mind the EOG has signed a five year deal with Messe Friedrichshafen to cooperate on the OutDoor show which is held in July each year.**

'OutDoor' is unique in being solely focussed on the outdoor sector and it provides a fantastic venue for all things 'outdoor', whilst simultaneously giving us the solid platform we need for constructive business. Both the EOG and OutDoor share the same vision of creating a uniquely individual, stand alone show that is truly international in character. As part of the agreement the show organisers have undertaken to improve many of the issues that were felt to be important to our members such as access, local transport, hotel accommodation etc. The outlook for OutDoor is bright!!

## **OutDoor Friedrichshafen-Workshops for the Industry**

One of the first initiatives of the EOG will be to offer a series of workshops to all visitors during OutDoor from July 22nd to 25th in Friedrichshafen. The workshops will deal with the following topics:

1. *Public Relations for OutDoor Retail Shops*

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2. *Equipment Know How for Sales Floor People*

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3. *Sponsoring of OutDoor Athletes or Expeditions.*

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All three workshops will be held in both English and German and are Free of Charge but book quickly as the number of spaces is strictly limited!

The EOG have decided to keep these workshops entirely independent, no sponsorship has been sought and no brands will be featured more prominently than others, Mark Held, General Secretary of the EOG, commented: "When the participants leave the workshops, we want them to say: Wow, I have really learnt something! Our target is to increase knowledge and to improve the general level of expertise in our industry." The workshops have been organised in conjunction with Kern Gottbrath Kommunikation, a Munich based agency. Till Gottbrath the main presenter, is an industry veteran with high expertise in marketing, journalism and equipment, he has also participated in a number of serious expeditions. Mark Held will be the co-presenter. Mark Held, prior to the EOG worked in various senior positions for Berghaus, and Lowe Alpine, among others. He too, has extensive experience with a wide range of outdoor activities.

Every workshop has a clearly defined target group, they are open to all visitors of the show.

However, the number of participants per workshop is limited to 60! Registrations will be accepted on a first come first served basis. During OutDoor you can register at the Main Information Desk, West Entrance.

### **Public Relations for OutDoor Retail Shops**

Friday 23	8am in English
Saturday 24	8am in German
Location:	Conference Center, Room Österreich

### **Equipment Know How**

Friday 23	9.15am in English
Saturday 24	9.15am in German
Location:	Conference Center, Room Österreich

*We are aware that this workshop could easily take an entire year, as there is so much to know. So it will be highly interactive, with questions and answers only. The participants should hear what really matters to them.*

### **Sponsoring of OutDoor Athletes or Expeditions**

Friday 23	2pm in English
Saturday 24	2pm in German
Location:	Conference Center, Room Österreich

## Close Co-operation with National Bodies

**As part of its brief to further the interests of the European outdoor industry, the EOG is establishing close working relationships with National Outdoor Associations.**

Believing strongly in the idea that information should flow both ways, the EOG wishes to be kept informed of national issues and debates, whilst at the same time providing information back to the national associations on international issues. By doing this the EOG is correctly positioned to lend assistance and support where necessary, without interfering in domestic matters.

To date the EOG has become an affiliated member of the UK body, the Outdoor Industries Association, and the German Fachgruppe Outdoor which is part of the wider BSI Sports Industry Group. Close contact has also been established with the Swedish Outdoor Group, an association that has been particularly active at recent European trade shows.

To enable National Associations to become Affiliate members of the EOG, a change to the associations Bylaws will be necessary and this is tabled for the Annual General Assembly which will be held in Friedrichshafen on the 24th July 2004.

If you would like to discuss Affiliate membership or any other aspects of National Representation, please contact Mark Held.

## The EOG Works on Quantative Market Research

**High on the EOG's priority list are proposals to introduce ongoing statistical research within the European market.**

To date it has been almost impossible to get an accurate assessment of the size of the overall

# The European Outdoor Industry Cautiously Optimistic



**The EOG has recently undertaken a comprehensive survey of member's opinions on the state of the industry and emerging trends.**

The survey was in two parts, the first aimed at establishing views on the state of the trade in general, whilst the second was about individual product categories.

So is the industry healthy? We measured the following areas:

- Business confidence in comparison with this time last year
- Domestic sales for spring/summer 04
- Domestic sales for fall/winter 04
- European sales for fall and winter 04
- Non European international sales
- Overall purchases of goods and materials
- Marketing spend
- Numbers of employees

The last few years have been a bit uncertain within the industry and retail sales in general have not

been performing well. So it's understandable that EOG members are cautious in their approach with more than 50% saying their business confidence is more or less the same as last year. Beyond the factor of overall confidence however, the majority of EOG members are reporting increases in every other category! Of particular importance is the almost universal increase in sales to non-European countries.



### Specialist v general outdoor

Changes in lifestyle toward a healthier outlook seem to be

behind the fact that the general outdoor market appears to be growing, whilst the specialist market appears to be static. New trends such as Nordic Walking are contributing to this and members are actively investing in the development of these areas.



### Market consolidation

The trend towards both retail and brand consolidation has accelerated over the last few years and the EOG survey indicates that there is every expectation that this will continue. The effects of this will be of significant importance and are likely to cause polarisation within the industry, which will in turn put an ever increasing emphasis on the need for skilful strategic planning.

European outdoor market, with estimates varying wildly. This year's Annual General Assembly will view detailed proposals for a system of contributive research, where each member would provide sales volume and value for a wide range of different product categories.

This information will be confidentially analysed by an independent market research company and then provided back

to contributing companies. The key to the proposal lies in the fact that each member will get to see the total size of the product sector in question and their respective market share, but not the market share and numbers of its competitors. If successful, the proposed system will provide an invaluable tool for strategic planning and resource allocation and will be a major benefit of membership of the EOG.

