



European Outdoor Group™

Together we accomplish more.



European
Outdoor
Group™

Market Insights

In the European Outdoor Industry

Who We Are



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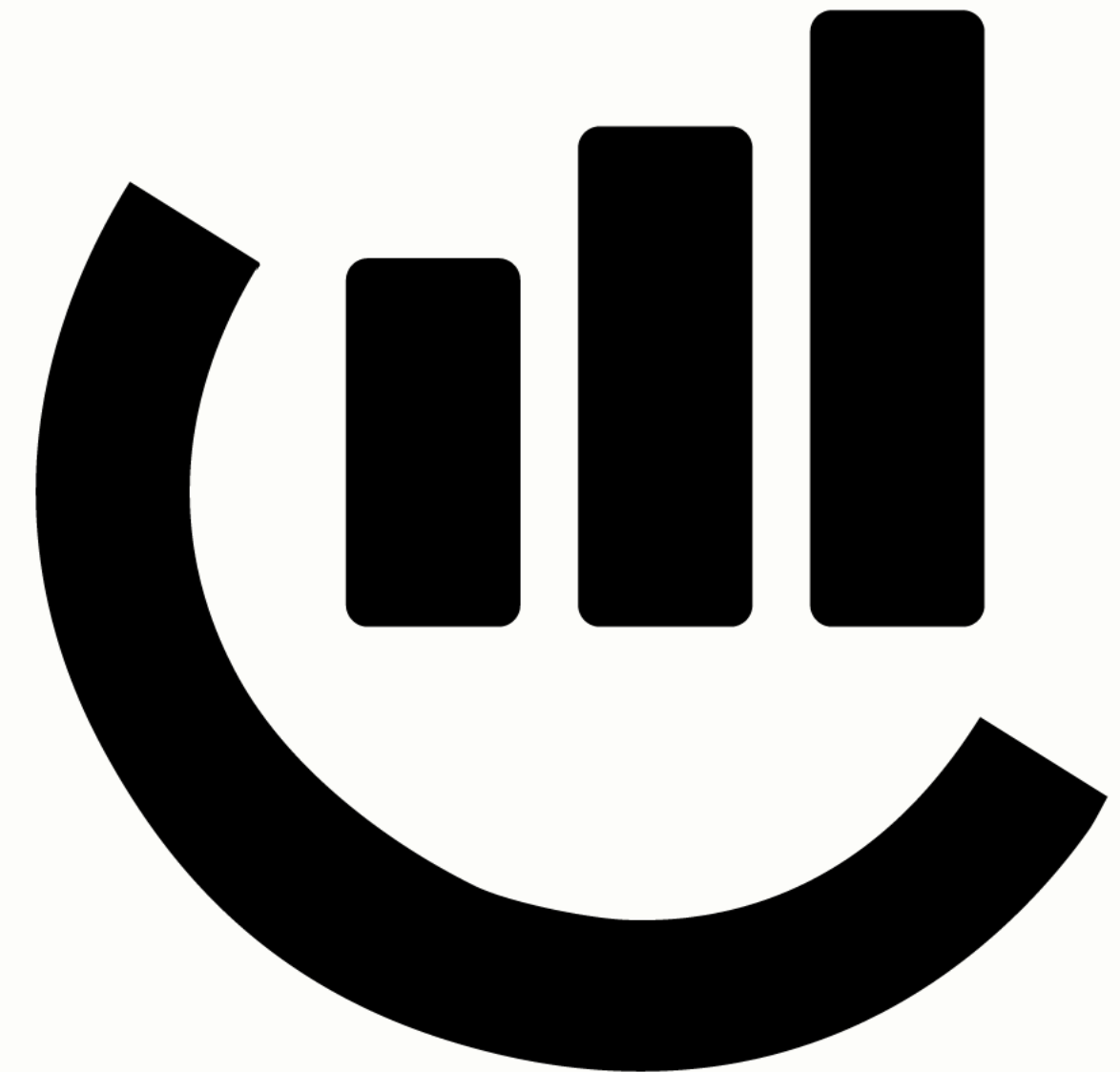
Why Market Insights?

- Better understanding of customers
- Competitive analysis
- Identifying market opportunities
- Risk mitigation



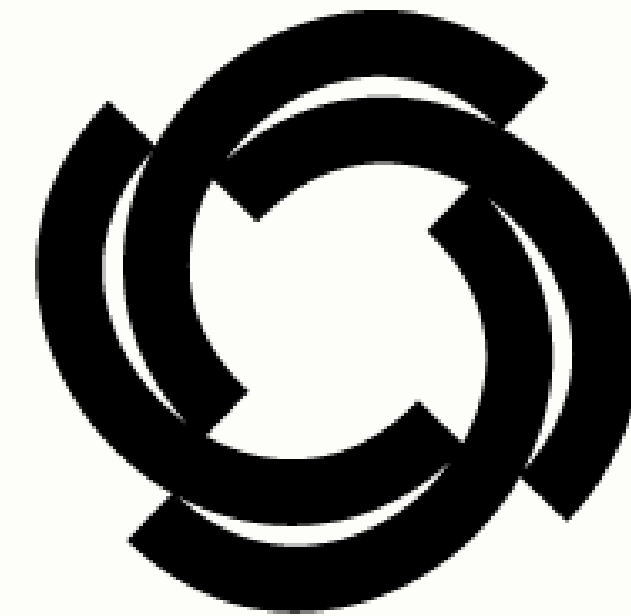
Market Insights in the European Outdoor Industry

- Industry built by enthusiasts
- Culture that values authenticity and intuition
- The market has grown more complex and competitive, with more diverse activities and audiences
- Fragmented market analysis



EOG Market Insights

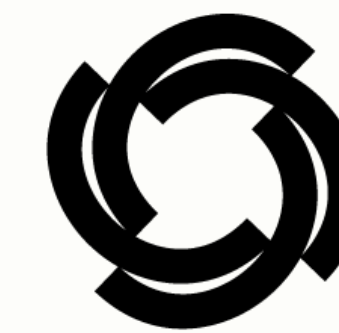
- State of Trade Report (paused)
- Annual Market Report (in progress)
- Outdoor Market Intelligence Service (live)



**European
Outdoor
Group™**

Outdoor Market Intelligence Service

- The only platform in the outdoor industry to provide monthly sell out data across Europe
- OMIS is the first European sell-out panel with data supplied directly from the market. The product taxonomy, categorisation and filter set was created by European outdoor brands and retailers
- **Data by the industry, for the industry**



**Outdoor Market
Intelligence Service**

Outdoor Market Intelligence Service

- This service is for brands, retailers and distributors, within the outdoor industry or anyone that has an active involvement within the industry
- The aim is to bring a complete market picture of the outdoor industry across Europe

Learn more



Outdoor Market Intelligence Service

Current data available:

UK

France

DACH

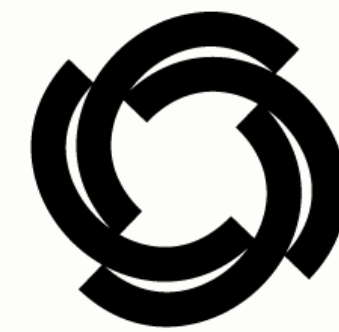
Coming soon:

Winter Sports (Ski/Snowboard)

In the future:

Southern Europe

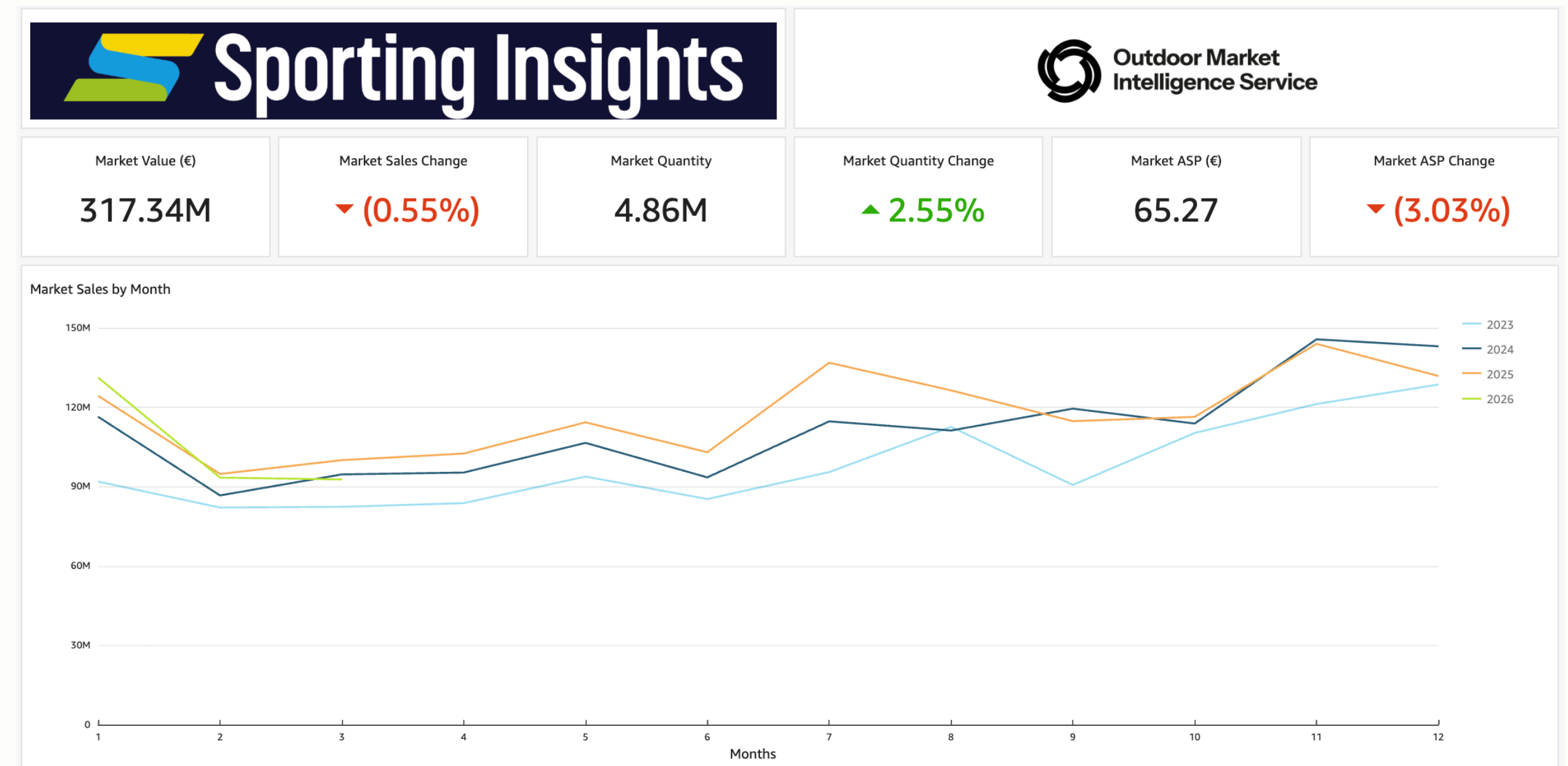
Scandinavia



**Outdoor Market
Intelligence Service**

Outdoor Market Intelligence Service

- 10 million SKUs in the database
- Over 2,000 physical sales locations
- Over €7 billion of sales
- Over 1000 brands represented



OMIS Network

NATIONAL PARTNERS



Snowsports Industries America

GENERALIST RETAILERS



SPECIALIST RETAILERS



DIRECT BRAND SALES



Outdoor Categorisation

Department - The Department is the first level of data categorisation. Data is allocated to one of the 6 Departments:

1. Apparel
2. Footwear
3. Camp
4. Verticality
5. Packs & Luggage
6. Equipment

Category - The Category is the second level of data reporting. Within each Department, data is categorised into specific Categories. Eg: Within the Apparel Department, there are 6 Categories:

1. Jackets & Coats
2. Tops
3. Bottoms
4. Underwear
5. Swimwear
6. Accessories

Sub-Category - The Sub-Category is the third level of data reporting. Within each Category, users can drill down to specific Sub-Categories within the Category. Eg: Within the 'Bottoms' Category in the Apparel Department, there are 5 Sub-Categories

1. Trousers/Pants
2. Shorts
3. Skirts & Skorts
4. Leggings & Tights
5. Overalls/Jumpsuits

Attributes - These are filters that can be applied at either Dept, Category or Sub-Category level to further refine the reporting. For example, the ability to select Jackets that are waterproof/windproof, etc.

Launched DACH Panel

- €1.4B+ in sales
- Data Contributors: Intersport Germany, Sport2000, Bergzeit, Bergfruede, Sporthaus Schuster, Sportshoes.com, Transa, Depor Village, Snap Outdoor, Equip – Rab, Sea to Summit, Merrell, Buff, Jack Wolfskin, Patagonia, Black Diamond, All Trick, Sidas





Market Insights 2026

Marc Anderman | Sporting Insights



Q1 (Jan-March) 2026 - DACH

- DACH seemingly resilient for Q1, with panel value essentially flat (-0.55%) and unit volume sales growing +2.55% year-on-year



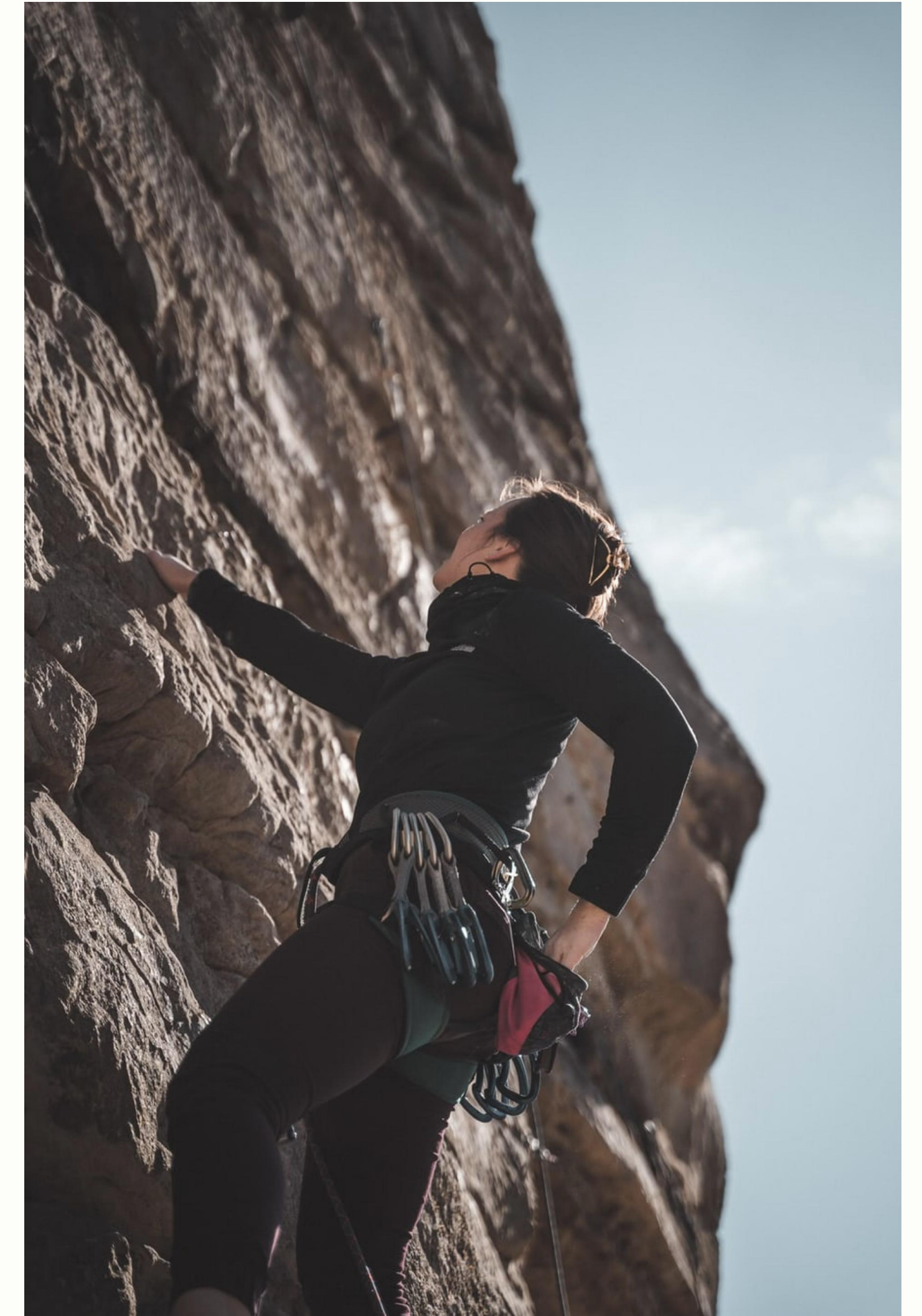
Q1 (Jan-March) 2026 - UK

- UK panel sell-through value declined 4.21% year-on-year in Q1
- Average Selling Price rose +1.87%
Consumers are buying less but spending more when they do



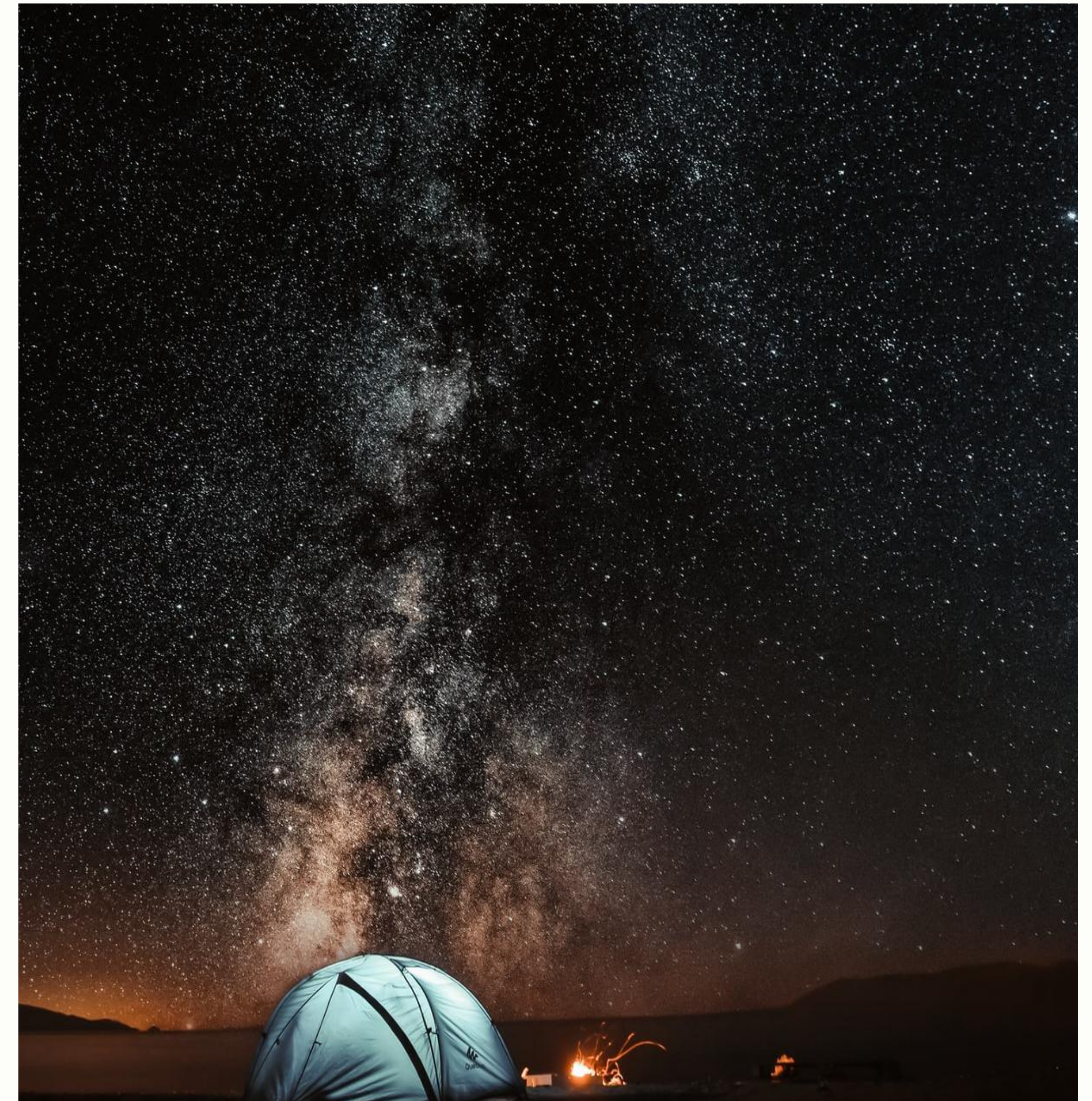
Q1 (Jan-March) 2026

- Climbing & bouldering (Verticality) was the standout performer, up +13% in the UK and +9% in DACH by value in Q1, bucking the wider market trend in both regions



Q1 (Jan-March) 2026

- Camp was a bright spot in DACH in March, posting positive year- on-year growth against a broadly declining market
- Apparel and Footwear remain under the most pressure across both markets

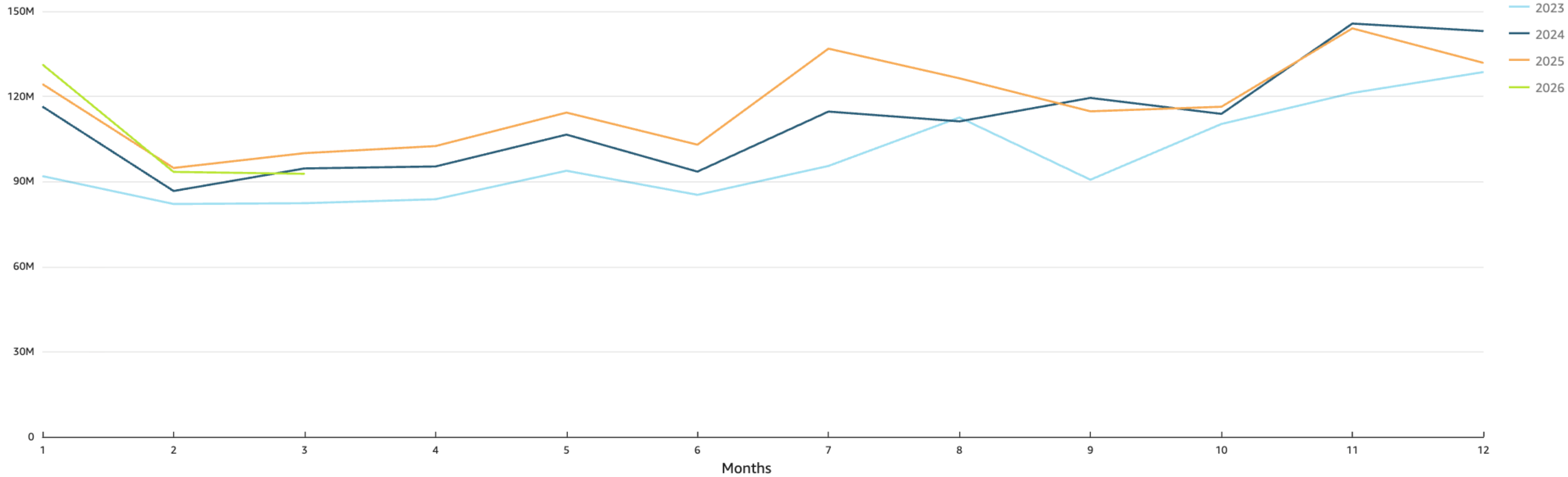


DACH DASHBOARD – Q1 2026 (Jan-March)



Market Value (€)	Market Sales Change	Market Quantity	Market Quantity Change	Market ASP (€)	Market ASP Change
317.34M	▼ (0.55%)	4.86M	▲ 2.55%	65.27	▼ (3.03%)

Market Sales by Month



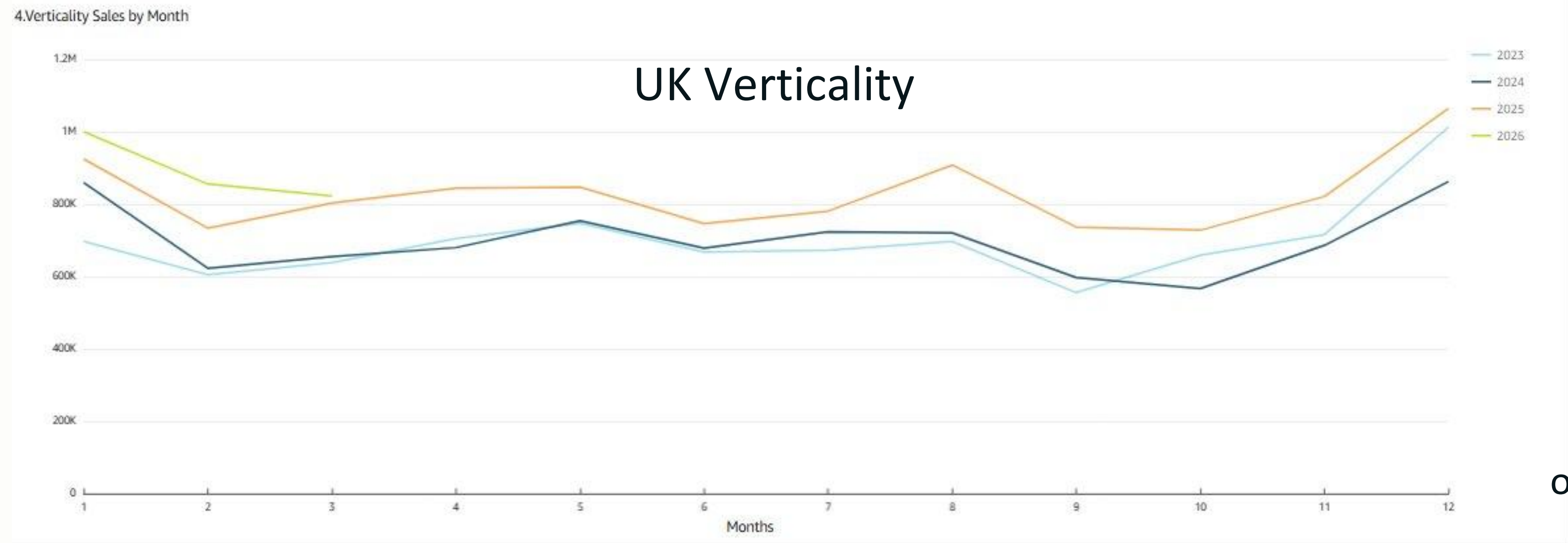
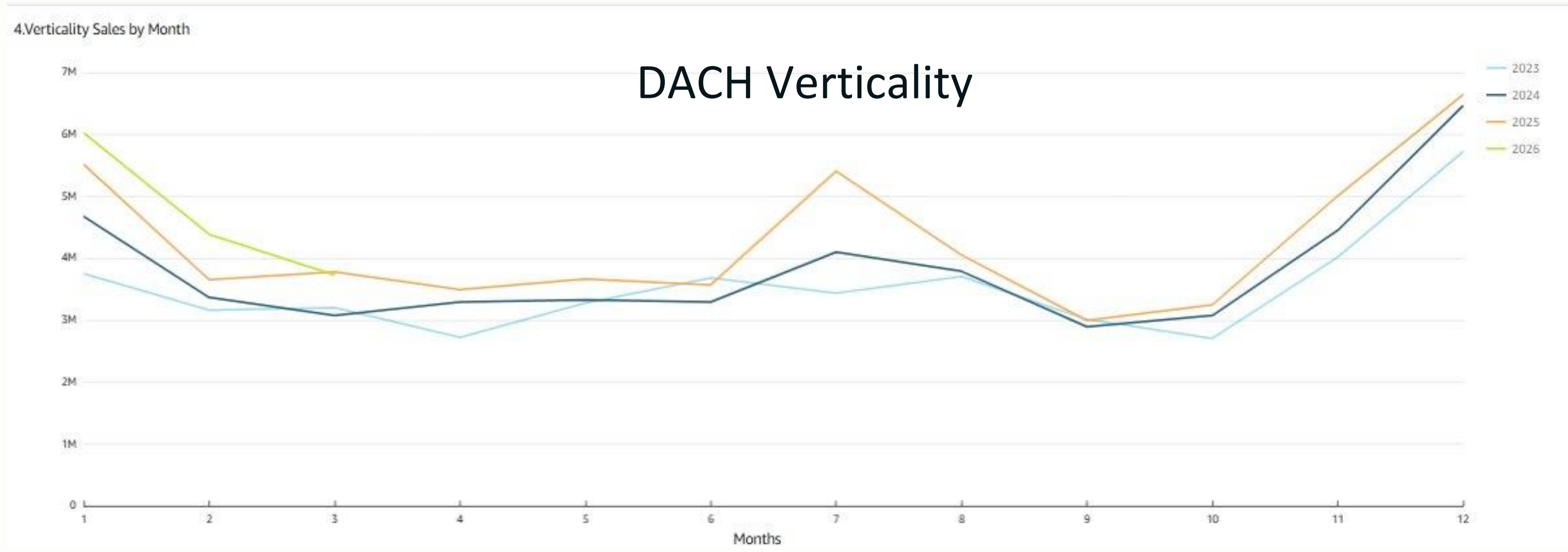
DACH DASHBOARD – Q1 2026 (Jan-March)

Breakdown of Departments



	Sales	Comparison Period Sales	% Change
Total	317.34M	319.11M	(0.55%)
1.Apparel	171.32M	173.49M	(1.25%)
2.Footwear	91.63M	93.01M	(1.49%)
3.Camp	6.53M	6.5M	0.44%
4.Verticality	14.14M	12.95M	9.19%
5.Packs & Luggage	15.75M	14.88M	5.81%
6.Equipment	17.97M	18.28M	(1.65%)

Verticality Dashboard – Q1 2026 (January to March)

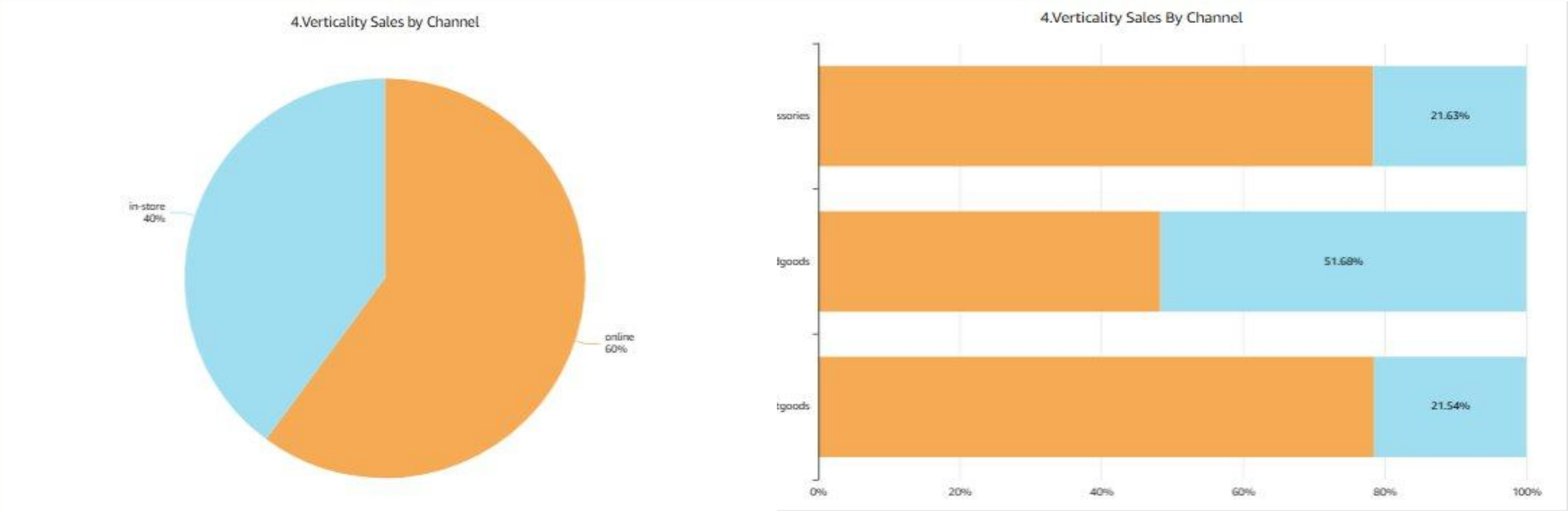


DACH Dashboard – Q1 2026 (January to March)

Verticality Sales in Detail

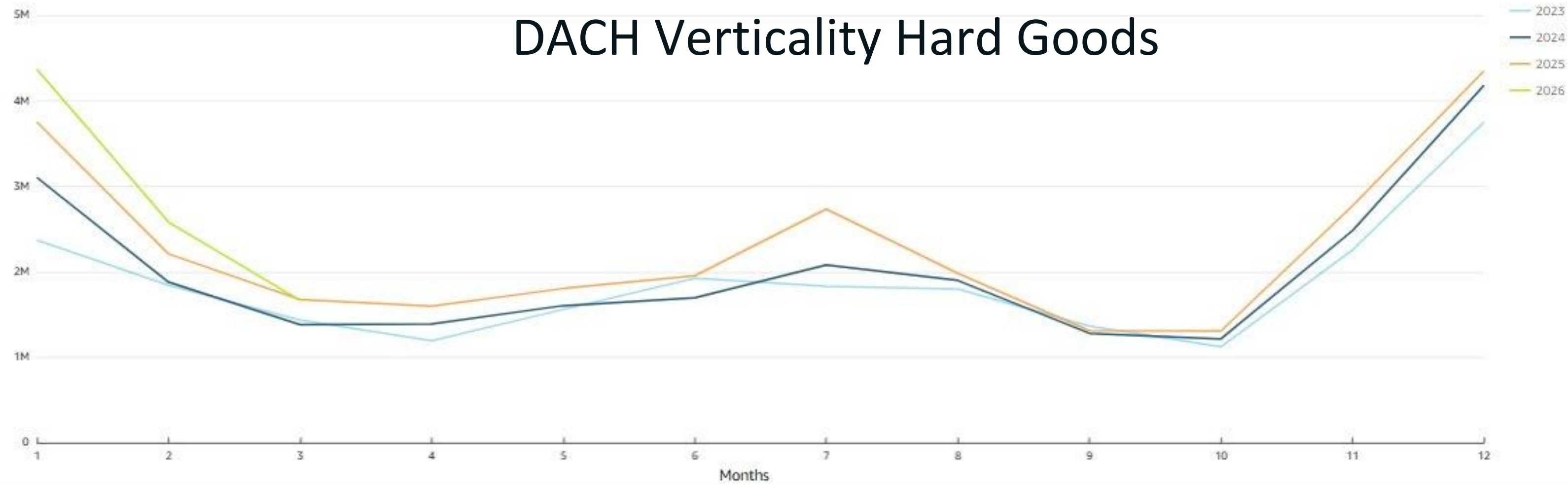
4.Verticality Sales (€)

	Sales	Comparison Period Sales	% Change
Total	14.14M	12.95M	9.19%
Accessories	736.07K	721.87K	1.97%
Hardgoods	8.61M	7.63M	12.87%
Softgoods	4.79M	4.6M	4.22%

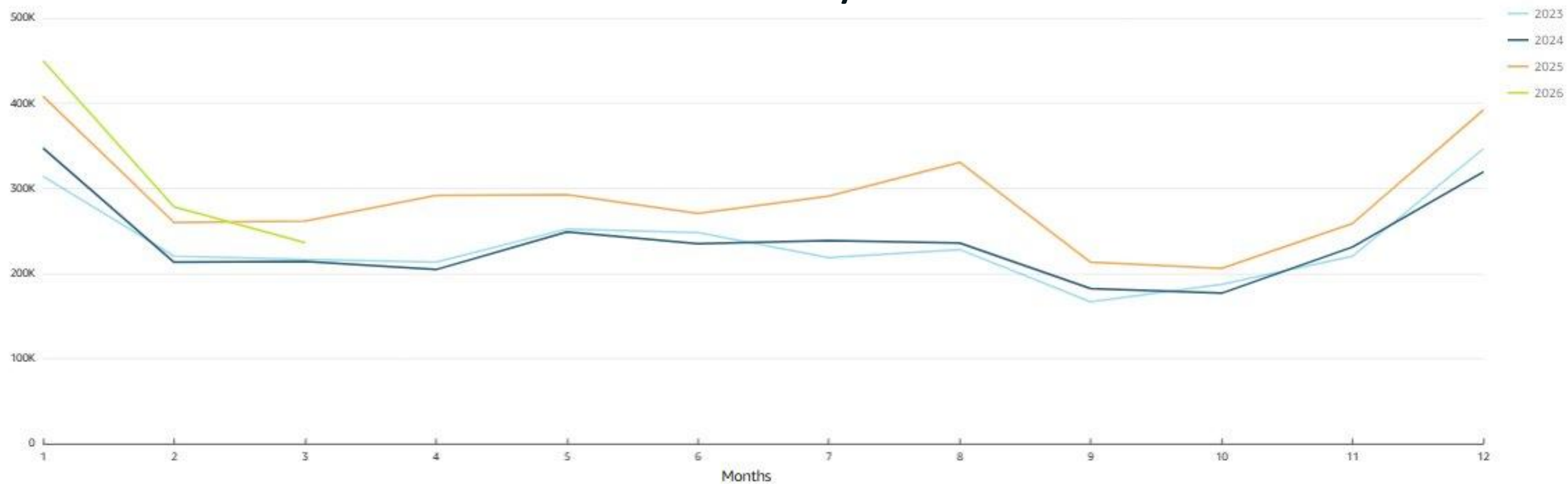


Verticality Dashboard – Q1 2026 (January to March)

4.Verticality Hardgoods Sales by Month



4.Verticality Hardgoods Sales by Month



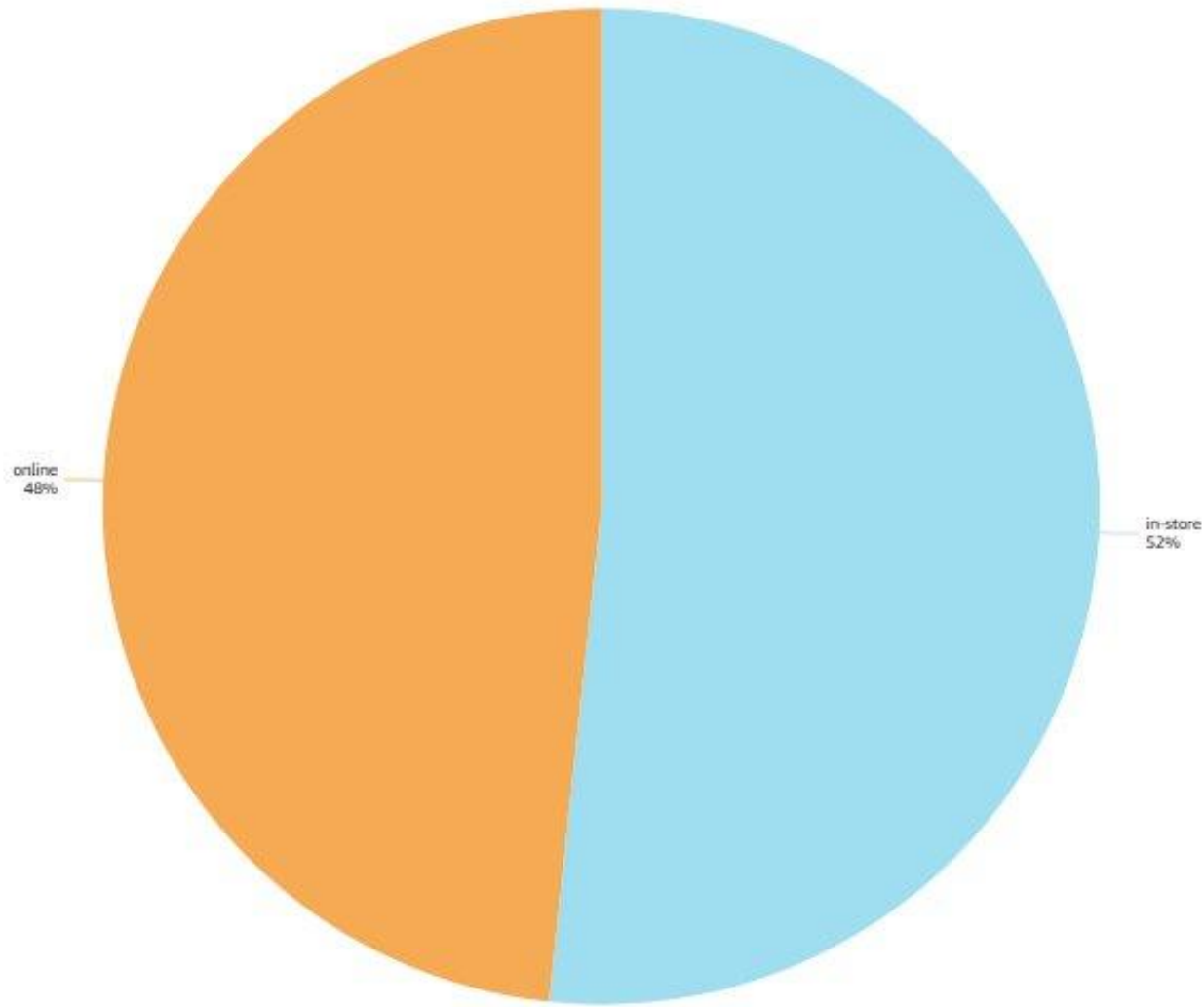
DACH Dashboard– Q1 2026 (January to March)

Verticality Sales Hard Goods in detail

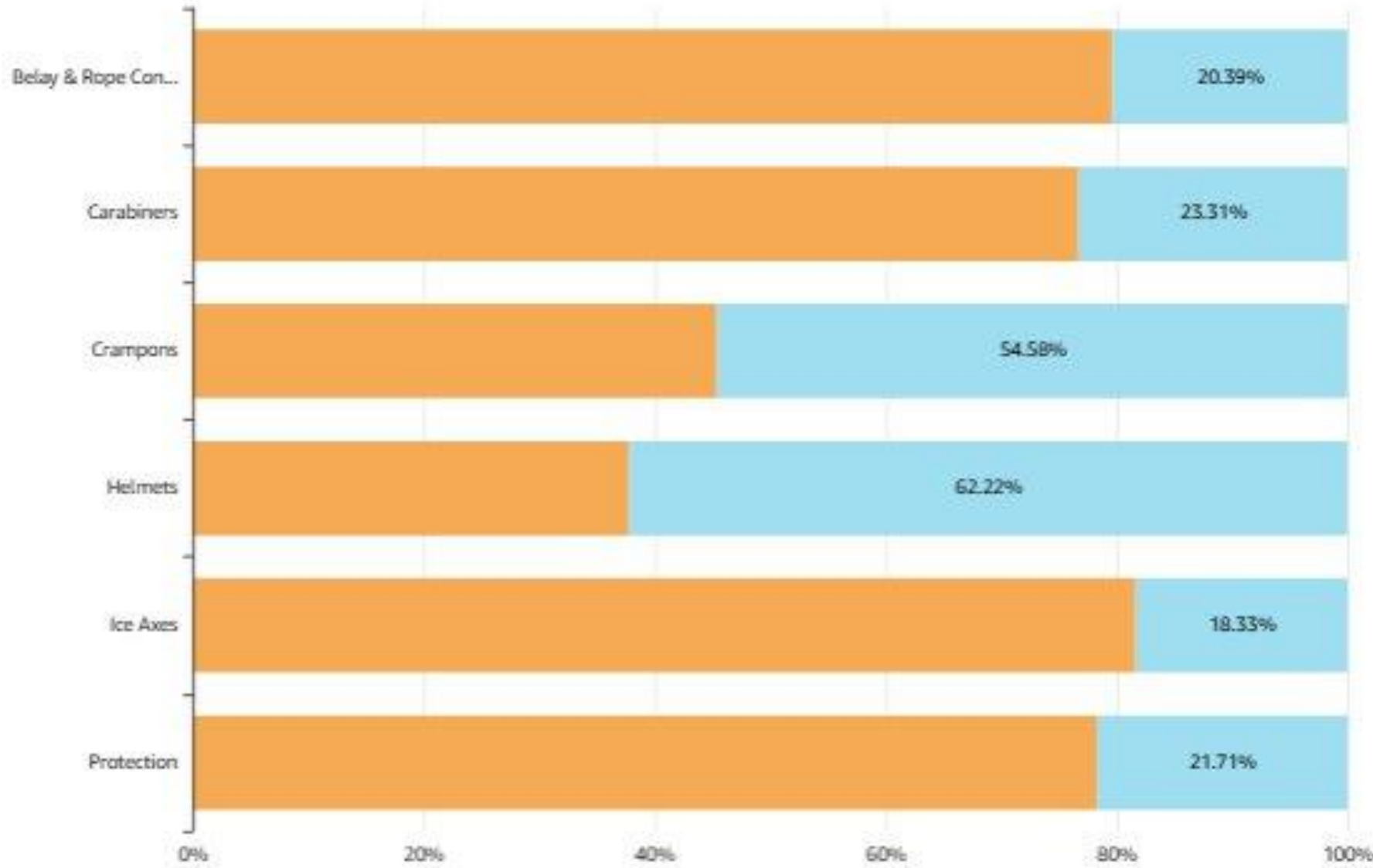
4.Verticality Hardgoods Sales (€)

	Sales	Comparison Period Sales	% Change
Total	8.61M	7.63M	12.87%
Belay & Rope ...	488.29K	420.96K	15.99%
Carabiners	682.33K	605.46K	12.7%
Crampons	1.02M	789.04K	29.26%
Helmets	5.55M	4.98M	11.62%
Ice Axes	245.62K	224.69K	9.31%
Protection	623.02K	614.95K	1.31%

4.Verticality Hardgoods Sales by Channel



4.Verticality Hardgoods Sales By Channel



DACH Dashboard– 2025

Verticality Sales - Leading Brands (DACH) 2025

		Percentage Share %	Sales % Change from 2024
1	Petzl	13.1%	30.09%
2	Edelrid	11.0%	8.72%
3	La Sportiva	8.8%	3.36%
4	Mammut	5.5%	7.48%
5	Black Diamond	5.3%	4.13%

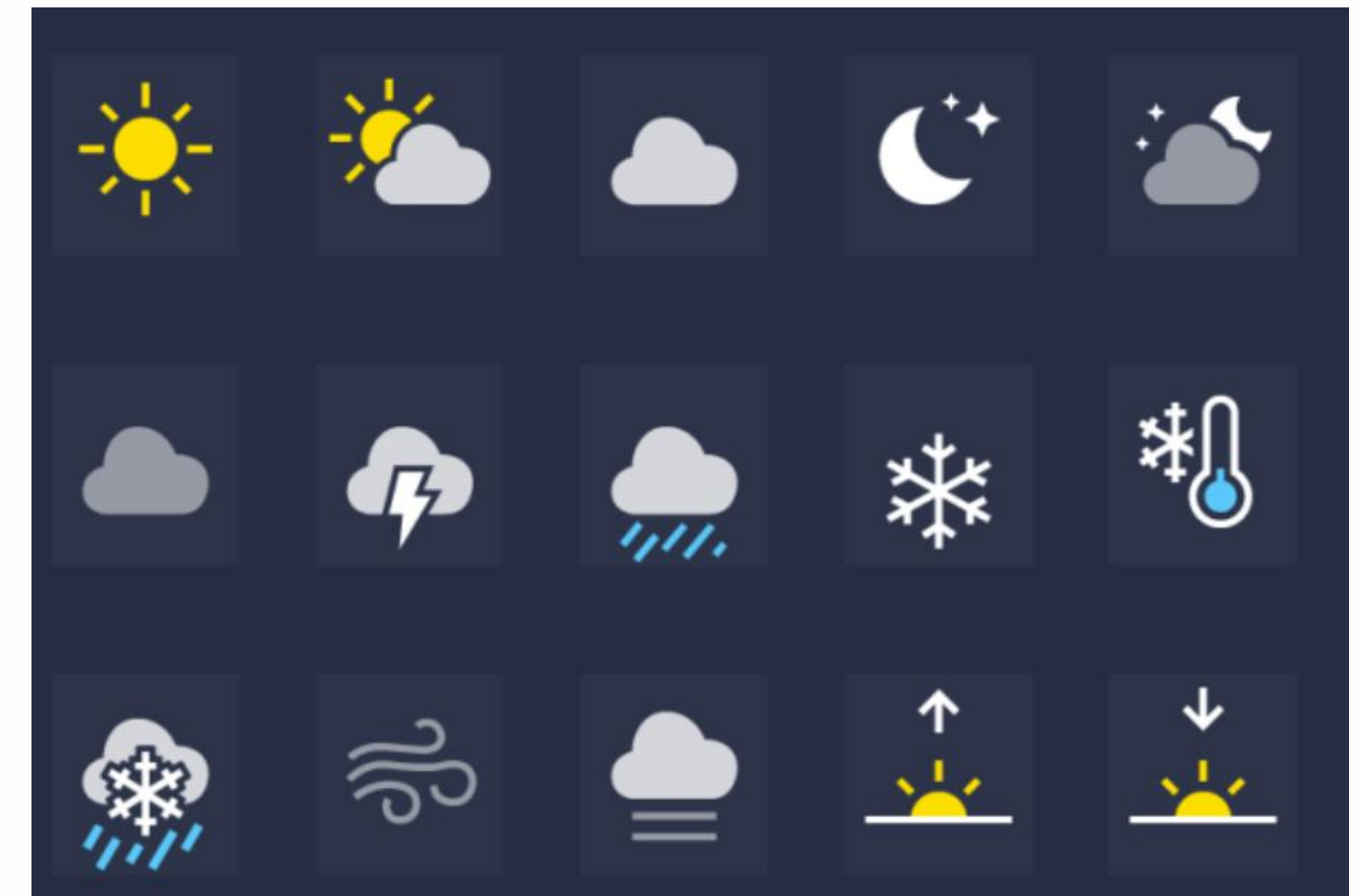
DACH Dashboard – Model Level

Example of model data. If you subscribe you get to see your sales at model level

	Sales (€)	Comparison Period Sales (€)	Sales % Change	Items	Comparison Period Items	Items % Change	ASP (€)	Comparison Period ASP (€)	ASP % Change
DMM									
DMM Dragon Cam - 0	936.21	230.17	306.75%	12	3	300%	78.02	76.72	1.69%
DMM Dragon Cam - 00	1.96K	232.80	741.86%	25	3	733.33%	78.39	77.60	1.02%
DMM Dragon Cam - 1	1.77K	235.50	653.48%	21	3	600%	84.50	78.50	7.64%
DMM Dragon Cam - 2	1.37K	94.95	1,347.95%	16	1	1,500%	85.93	94.95	(9.5%)
DMM Dragon Cam - 3	1.65K	94.95	1,639.57%	19	1	1,800%	86.93	94.95	(8.44%)

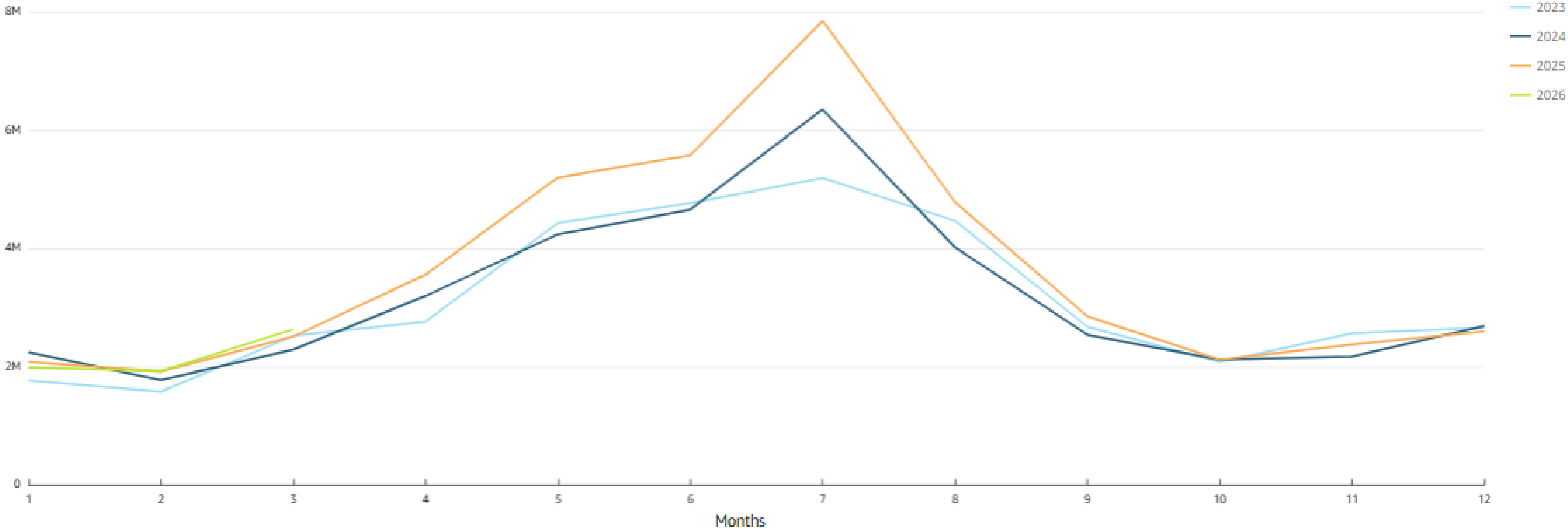
Seasonality Questions

1. Change in seasons → shorter Spring → reduced selling periods for certain items?
2. Correlation between rainfall and Jackets...or what else impacts sales?
3. When summer finishes, what happens to Camp sales?
4. Autumn signals, key selling time for premium apparel?



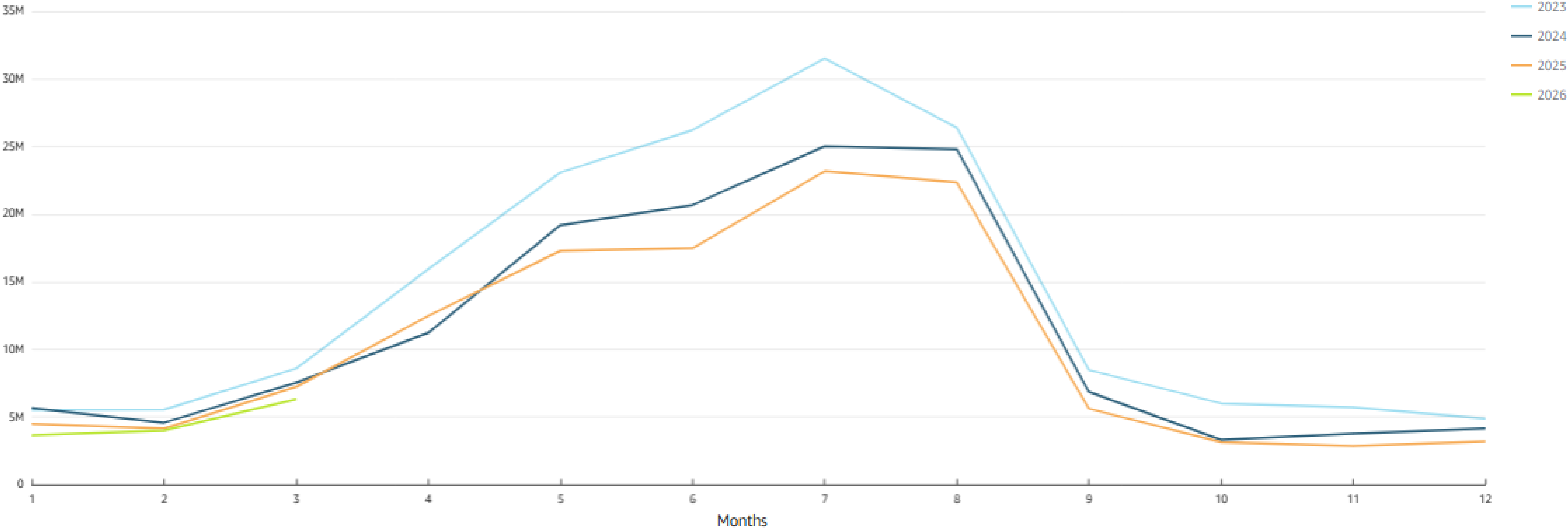
DACH DASHBOARD – FULL YEAR 2025 - CAMP

3.Camp Sales by Month

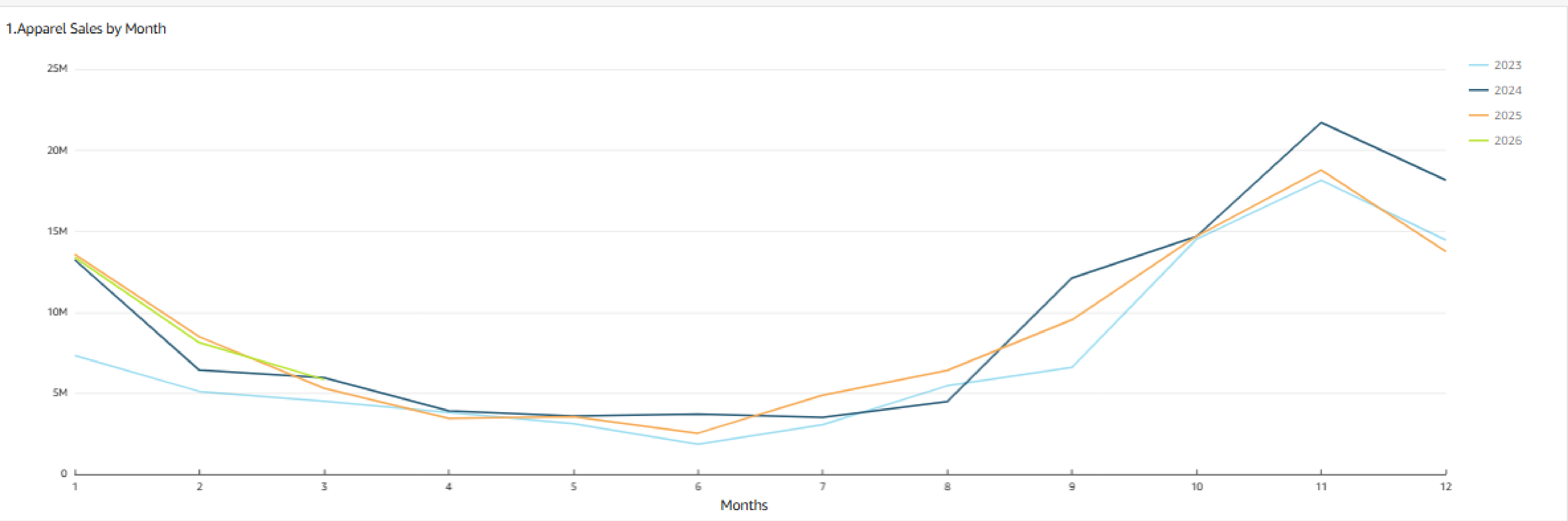


UK DASHBOARD – FULL YEAR 2025 - CAMP

3.Camp Sales by Month

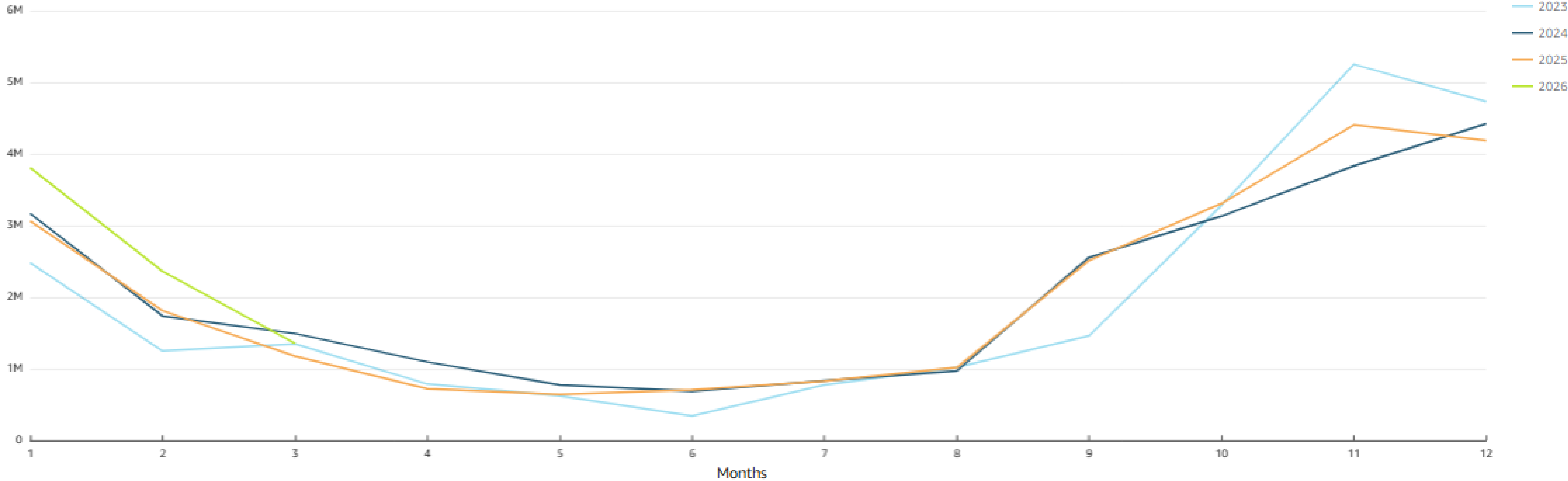


DACH DASHBOARD – FULL YEAR – PREMIUM APPAREL



UK DASHBOARD – FULL YEAR 2025 – PREMIUM APPAREL

1.Apparel Sales by Month



Data Flow



- Each data provider is set up with a secure S3 bucket which can only be accessed via the SFTP credentials. Once the data is standardised, it's pushed into Snowflake data warehouse.
- The data is aggregated and transformed into the reporting tables. The visualisation can be found within Amazon QuickSight. Individual logins are assigned and controlled via the RLS.

Trial Pricing

Price Per Month	DACH Service Only	DACH & UK Services
All Departments	€2,500	€3,500
Either one Category; or selected 4 Sub-Categories	€1,000	€1,500

What OMIS Users Say:

“I’ve used data extensively throughout my career in the outdoors industry to make better strategic decisions. With OMIS, we’ve been able to identify gaps in the market where we could expand or refine our produce range and dramatically increase our market share in just the first year. The data doesn’t make our decisions for us, but it helps us make the best possible use of our resources so that we can focus on making innovative products.”

Richard Leedham
CEO, RAB



What OMIS Users Say:

“A question I hear more and more is ‘have we got any data about our consumers to help us make better decisions?’ Whether small or large organisations, we are all needing data and better insights to help us improve our product, sales and marketing. The EOG OMIS project is an invaluable and extremely affordable way to access robust and high-quality data that is relevant to our brands and industry. I’d encourage all members to get involved”

Jonathan Petty
VP Sales EMEA, Helen of Troy (Osprey & Hydro Flask)



Recap

- You need data standards – so the data can be viewed across key metrics.
- You need collaboration – data owners see the benefit in sharing, become a data contributor and brands become data subscribers.
- You need trust – a willingness to work with a project and see that the data can be aggregated and anonymized. Often comes down to individuals who have built trusted relationships over time.
- Our aim is to bring more insights validated by data into the outdoors industry.
- Between Sporting Insights and the European Outdoor Group, we aim to assist the industry in understanding data more effectively.

Learn more



Get in touch



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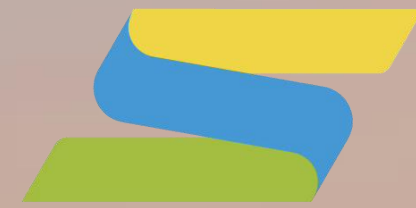




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Thank You!