



EUROPEAN
OUTDOOR
GROUP

European Outdoor Group Annual Report & Accounts 2020



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EOG President's Introduction and Executive Summary



At the start of 2020, news of the raging bushfires in Australia was dominating the media. Around the world, we looked on in horror, and the unfolding situation once again put a spotlight on the climate emergency. Back then, that story felt like it would shape and define the narrative for the year. I mention it first because it's a reminder that despite everything that has happened since, we still need to focus on the long-term global issues that will continue to affect all of us.

Of course, 2020 will now be chiefly remembered for another reason. COVID-19 has impacted every level of society and business, and although as an association, the European Outdoor Group always has to focus on its practical role in supporting our industry, the team here is acutely aware of the human cost of the pandemic.

As soon as the potential scale of the coronavirus crisis started to become clear, we moved fast as an organisation, adapting our working practices, and increasing the frequency of our communications with members and external partners and stakeholders. From early on, we confirmed and shared the latest relevant information and guidance about a wide range of topics. At the same time, we were already engaging with our networks to start planning for the recovery. For this, the strong relationships and connections that we have built through our public affairs activities in recent years proved to be of great value. While a return to normality is taking longer than any of us anticipated, by being proactive from the start, we have been able to effectively represent and support our membership and the wider industry throughout the pandemic.

From early on, we confirmed and shared the latest relevant information and guidance about a wide range of topics. At the same time, we were already engaging with our networks to start planning for the recovery.

At the same time, we have also made good progress in the key priorities for the year that we presented during the 2020 Annual Assembly. As you know, the EOG's core work is always aligned to our three pillars: Doing business right; preserving nature; and getting people active outdoors. Inevitably, we adjusted our approach to these activities to reflect the new context and likely future circumstances. However, you will read in this report that not only did we successfully continue to deliver established programmes, but we also took significant steps forward with new initiatives in market research, CSR and sustainability, and retail.

Meanwhile, we continued to support our colleagues at the European Outdoor Conservation Association (EOCA) and It's Great Out The Coalition (IGOTCo), as they grappled with the very specific challenges of sustaining their important work in the midst of a pandemic. EOCA – with fantastic support from its members – was able to raise more funds than ever and comfortably beat its Plastic Free: Mountain to Sea target. The team at IGOTCo had to get very creative in the first half of the year, when the notion of actively encouraging citizens to get outside suddenly became very controversial. Both organisations found a way to navigate their way through 2020 and are now preparing for a busy time in the year ahead.



EOG President's Introduction and Executive Summary



The aspect of our usual schedule that suffered the most in 2020 was events. At our Annual Assembly just before ISPO Munich, the team from Messe Munich briefed our members on the precautions that were being taken during the show, in light of the emerging virus. Little did we know then that ISPO would be the European outdoor industry's only large scale physical gathering of the year. At the start of 2020, we were in discussion with our colleagues at Messe Munich about how to improve the OutDoor by ISPO platform. As it turned out, focus soon shifted to the creation of online only events, and sadly, that is carrying over into at least the first part of 2021. We also had exciting plans for the European Outdoor Summit and together with our event partners, Outdoor Sports Valley, we were looking forward to hosting it in Annecy. Unfortunately, this was not possible, but rest assured we are making new and exciting plans for the event in future.

EOG members will know that a large proportion of the association's income is derived from events, so we faced some budget challenges during 2020. However, as you will see in our accounts and audit, our cautious approach to reserves in years past, allowed us to remain financially stable during this difficult year. We also made what savings we could during the year and explored options for establishing alternative sources of income in the future. This process will continue and we will keep members updated on progress.

I want to pay particular tribute to the EOG executive team, led by General Secretary Arne Strate. They have all risen to the unique challenges of 2020 with great fortitude and flexibility. The reality of the virus was demonstrated starkly when our Head of Marketing and Communications Dan Thompson tested positive. Dan has subsequently suffered the debilitating effects of 'long COVID' and we hope that he returns to full fitness soon. On a positive note, we were delighted to welcome Dr. Verity Hardy during the year, as our new CSR and Sustainability Project Manager. Thanks to the efforts of everyone in our team, the association remains in very good shape.

That status is also in no small part due to the contributions of the EOG Board. I am very grateful to Vice President Antje von Dewitz and all of the board members for providing me with unstinting support throughout 2020, despite at the same time having to deal with the day to day challenges facing their own organisations during the pandemic. Their commitment epitomises the spirit of collaboration that is the driving force of our association. John Jansen, Rainer Angstl and Ryan Gellert are stepping down at the Annual Assembly and we owe all three a debt of thanks. Each has made major contributions to the EOG and provided wise counsel, and John's term as EOG President was a time that saw great and necessary changes that have allowed our organisation to flourish.



To conclude, I don't really need to reiterate that 2020 was a turbulent year, but I reflect again on the theme of the opening paragraph of this introduction. It is worth noting that there were also other huge events during the year that will have a profound impact on business and politics in Europe, from the conclusion of a Brexit deal to the election of a new US President. As ever, our industry will be much better equipped to address all of these shared challenges, and more, by working together. That is what the EOG is here to facilitate and I thank you for your continued membership and active involvement in our portfolio of projects.



Mark Held,
EOG President

Managing Committee, Registered Office & Membership



Managing Committee

The Managing Committee for 2020 was comprised as follows:

Mark Held (UK)	President Elected Feb 2019
Antje von Dewitz (DE)	Vice President Elected Jan 2020
Michel Gogniat (FR)	Treasurer Elected Feb 2019
John Jansen (NL)	Member Elected Feb 2019
Rainer Angstl (DE)	Member Elected Feb 2019
Matthias Zaggl (DE)	Member Elected Feb 2019
Ryan Gellert (USA)	Member Elected Feb 2019
Oliver Pabst (DE)	Member Elected Feb 2019
Paolo Bordin (IT)	Member Elected Jan 2020
Guillaume Meyzenq (FR)	Member Elected Jan 2020
Nikolai Rabaek Christensen (DEN)	Member Elected Jan 2020
Benjamin Thaller (FR)	Member Elected Jan 2020

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 2020, the membership of the EOG numbered 97 companies and 12 associations.

Membership Fees

The bylaws state that the annual fees are determined at the Annual General Assembly.

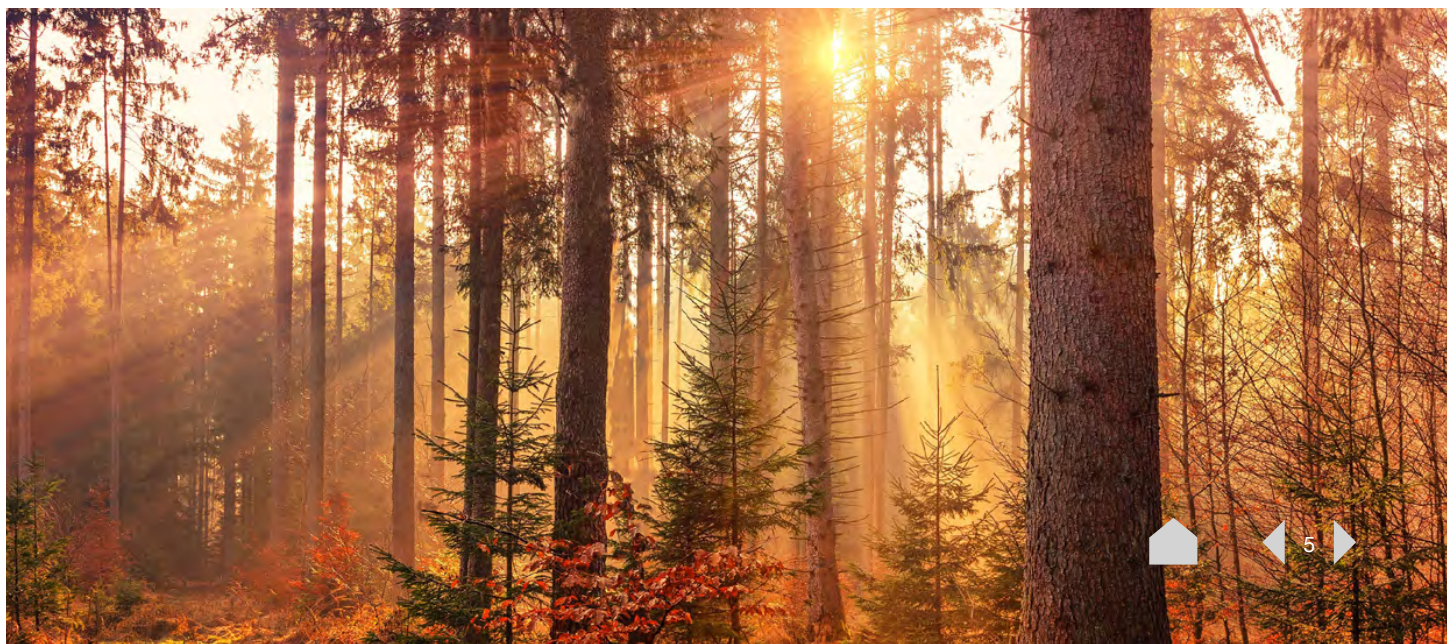
During the January Annual General Assembly, the Board proposed to maintain the membership fees at the following bands:

Turnover	Membership Fee
<i>Up to €15 million</i>	€2,500
<i>€15 – 40 million</i>	€3,750
<i>€40 million plus</i>	€5,000

The proposal was agreed by the meeting.

Budget

The budget for 2020 was presented to the membership at the Annual General Assembly and approved.



Summary

2020 was a tough year for most organisations and individuals, and the thoughts of the EOG are with those who have been affected personally and from a business point of view. This was also true for the association, with our income reduced dramatically due to the cancellation of OutDoor by ISPO. Prudent management of our finances over recent years meant that we had sufficient reserves to allow us to continue to operate on a day to day basis and undertake important work for the sector.

During the year, we focused on sustaining existing workstreams (outlined during the Annual General Assembly in January), while at the same time supplementing that with specific pandemic related activities.

We invested in a broad range of important projects that allowed them to make important progress:

- Improvements to the Outdoor Retail Benchmark Report through the introduction of a new data collection and reporting portal, and the move to monthly reporting
- Completion of a major consumer research project across Europe in partnership with the It's Great Out There Coalition
- Support provided to members relating to the Sustainability Charter and carbon footprinting
- Launch of the Climate Action Programme
- Major development in retail work with the launch of the go-to-market working group (which is now diving even deeper into the industry's supply chain challenges)
- Design, development and launch of a new website
- Establishment of the Audit Alliance for Hard Goods
- Enhanced communications throughout pandemic and other ad hoc COVID-19 responses.

During the year, the EOG continued to provide support for the important work of the European Outdoor Conservation Association, It's Great Out There Coalition and The Microfibre Consortium.

As the pandemic emerged, the EOG publicly advocated the importance of cooperation and ethical business behaviour during the crisis - for EOG members, their business partners and stakeholders, and industry in general. We pushed these messages through our own channels, external communications, and in our public affairs work. We know that the tough times will be with us for some time to come and we are planning our budgets accordingly, but as a trade, it is clear that we are prepared to work together to overcome the key challenges that we all face.





Activities in 2020



CSR and Sustainability

From a CSR and sustainability perspective, the events of 2020 have highlighted the complexities of the global supply chains in which we operate and emphasised that no government, business or individual can tackle these challenges alone. More than ever, this demonstrates the value of community, collaboration and compassion.

Despite these challenging and ever-evolving situations, the EOG has, once again, increased its capacity in this crucial area of our work, both internally and in our collaborative efforts with other organisations.

Under the leadership of our Head of CSR & Sustainability Katy Stevens, and with Jane Turnbull as Project Manager, the department was reinforced with the addition of our newest member Verity Hardy, who joined the team as Project Manager.

During 2020, within the CSR & Sustainability department, we have seen better engagement with EOG members than ever before, which has brought increased knowledge, depth and value to all of the projects that we undertake.

We formalised our partnership with Higg Co., an organisation that we view as being both industry critical, but also progressive as a comprehensive supply chain measurement and improvement system. This new enhanced relationship will provide additional benefits for EOG members, but also enable us to position ourselves more resolutely within the Higg environment.

Policy

Policy has understandably been a key focus over the last months, with the textile sector being identified by the European Commission as a priority sector in which the European Union can pave the way towards a carbon neutral, circular economy. This has been addressed in a number of policy documents including the European Green Deal, the Circular Economy Action Plan (CEAP), the recently announced EU Strategy for Textiles, and the discussed proposal for an initiative on sustainable corporate governance and mandatory due diligence. This increasing political pressure will provide a number of opportunities and challenges for which the industry must be prepared.

In order to address these, the EOG has increased its engagement with relevant stakeholders, in particular the Policy Hub and FESI, and furthermore a work group dedicated to this topic has been conceived. The aim of the EOG-led Sustainability Policy Workgroup is to provide a platform for sustainability related policy discussion and to efficiently gather feedback for any consultations that will affect the industry, while increasing the knowledge of policy processes for EOG members and highlighting opportunities for their valuable input.

Sustain the Momentum

As the effects of the pandemic took hold across the outdoor industry in the spring of 2020, there was a strong feeling among the sustainability community that the momentum which had been gathered in the previous years, and that was ever-present over coffees and in corridors at trade fairs, was in danger of being lost. In response to this, and in an effort to keep it at the top of the agenda, the EOG joined with Suston Magazine to deliver its first digital conference on sustainability.



The questions of ‘can the industry support the rising interest for the outdoors and convert it into care for nature?’, and ‘can brands and retailers reduce the ecological footprint of a growing outdoor community and remain profitable?’, were addressed during a very enjoyable and successful two-day digital event. The event hosted pioneers and activists of sustainability from the outdoor community and beyond. They brought with them inspiring and innovative solutions and, along with the interaction of attendees, it is clear to see that the engagement and drive that is so valued at the trade shows and events which are currently missing from the calendars, remains alive and well.



Microfibre initiatives

Our engagement in the area of fibre fragmentation continues twofold. Our involvement on the board of The Microfibre Consortium (TMC), means that we are able to guide the strategic decision-making processes of the organisation to ensure that content and direction of the outputs fulfil industry requirements. In our role in the Cross Industry Agreement (CIA), we have been instrumental in the translation of scientific principles to policy makers through the co-authoring of a publication, as well as during the process of engaging with multiple stakeholders in the development of a test method and the ongoing conversion of this into a European CEN standard.

Hard goods

Continuing to recognise the size and value of hard goods within the European outdoor market, and the differing sustainability requirements of non-textile materials and supply chains, impetus and engagement in this area has continued to flourish. The Hard Goods Round Table has remained the primary arena for the EOG and its members to connect on the subjects that matter to them, and this has been progressed further with the addition of a new communications channel to maintain permanent open dialogue.



During 2020, there were two meetings of the round table, with support from Peak Innovation. Topics discussed included recycled aluminium, the 'Sustainability in Hard Goods Report' which was published by the EOG in 2020, as well as an exploration of the application of the Higg Index for hard goods. Additional webinars were also offered on subjects such as chemical management, and the EOG intends to build on this going forward, based on the extremely positive responses received.

Audit Alliance

The 'Audit Alliance for Hard Goods', an EOG initiative that gained momentum in 2020, continues to work towards its goal of undertaking joint social audits in shared factories in Taiwan, with a view to addressing the use of forced labour. The group has its origins in the Hard Goods Round Table and, as with other issues that have been raised by the members, the group has been supported by the EOG in its desire to make positive progress in CSR and sustainability.

Building on a shared HR risk analysis of metal supply chains, and a collective code of conduct and guidelines on fair labour practices, identified factories have since been audited by a jointly selected auditor and the undertaking of remediation work is imminent. The Audit Alliance continues to be a genuine example of how brands can work successfully together, thus providing resource efficiency while critically, and most importantly, sharing and making tangible improvements within their supply chain.

Hard goods and Higg index

Another issue raised by members during the Hard Goods Round Table has been the ability (or lack thereof) to apply the Higg Index tool – Facility Environmental Module (FEM) – to hard goods manufacturing facilities. Through the EOG's continued association with the Sustainable Apparel Coalition (SAC) and Higg Co., and with the support of Karin Ekberg and her organisation Leadership and Sustainability, we have started to assess the requirements and barriers for hard goods brands and their facilities in using the FEM.

The SAC and Higg Co. have achieved significant traction in recent years and the desire to be included in this progression by our hard goods members has been clear – not just in Europe, but also in the US. As this work has progressed, the EOG has maintained a close and productive conversation with our colleagues in the Outdoor Industry Association (USA), who have looked at the application of Higg's Materials Sustainability Index (MSI) for hard goods. In light of this positive focus, the EOG will undertake a project to review the FEM, use small focus groups to assess its suitability for use with hard goods, then finally supply formal recommendations to Higg Co., with the intention that they may be included in the next revision of the FEM module.



Sophie Mather of The Microfibre Consortium

Activities in 2020

Climate Action Programme

In response to global reports on climate change, the goals set out in the 2015 Paris Agreement and increasing consumer interest in sustainability, the EOG has developed and started to roll out a Climate Action Programme (CAP). The aim of this is to help outdoor brands navigate the vast array of climate action tools and resources available, thereby enabling them to take the first steps in addressing the reduction of greenhouse gas (GHG) emissions they produce.

The programme was launched in November 2020 and comprises a comprehensive package of topic-specific guidance documents covering relevant issues such as inventory planning, data gathering, target setting, Scope 1, 2 and 3, reduction measures, offsetting and insetting, tracking emissions, reporting and communications. Throughout each guidance document, there are signposts to the most relevant resources, tools and standards, and a community platform has been created where participants can ask questions, share experiences, seek EOG support, and engage in peer-to-peer learning.

Supply chain decarbonisation project

Initial research, carried out during the development of the Climate Action Project, showed that *Scope 3, Category 1 emissions; Purchased Goods and Services* accounted for the majority of an outdoor brand's GHG footprint.

To address this, as part of the Climate Action Programme, we have initiated a collaborative action project on energy efficiency and decarbonisation in supply chains. Our aim is for brands to engage with their tier 2 to tier 4 suppliers regarding facility energy efficiency improvements and to increase the use of renewable energy.

Freight optimisation project

The initial research also showed that *Scope 3, Category 4 emissions; Upstream Transportation* accounted for the second highest contribution to a brand's overall GHG footprint.

Based on this data, we have launched a collaborative action project on freight optimisation. Through an industry round table, our aim is to discuss the potential to optimise up- and down-stream freight transport modes where we hope that, through healthy discussion, debate, research and collaborative thinking, the outdoor industry can start to address some of these issues.





DEMETO project

The EOG has continued to fulfil its contribution to DEMETO, the Horizon 2020 funded project. It was set to conclude in August 2020, but due to the ongoing exceptional global circumstance, DEMETO will now run until May 2021 and has secured the necessary extension to do this. The progress on the project, and specifically with the building of the plant in Chieti, has been impressive, and more so when considering the global challenges faced by all involved.

For its part, EOG produced a report, *'Understanding end of life and recycling practices'*, that identified and isolated the issues relating to the collection of feedstocks required for a technology such as DEMETO, and assessed the thinking of supply chain stakeholders throughout the process. To build on this work, and in association with the final phase of the project, the EOG, H&M and DEMETO will co-ordinate to share the outcomes of the testing activities and to showcase the anticipated success of the plant once it is fully functional.



Scoping reports

To provide the basis for our outputs in 2021, we have carried out scoping exercises in the following areas:

- Retail sustainability training – key retail stakeholders were interviewed to assess and understand the need for a retail sustainability training programme and what is important in such a programme
- Social sustainability – a benchmarking and scoping exercise was carried out to understand what members currently do within the area of social sustainability and how the EOG could better support them going forward.

Engagement with third party organisations

The EOG has continued to represent the European outdoor sector, as well as small-and-medium enterprises, as part of its output with several partner organisations:

- Sustainable Apparel Coalition (member)
- Aluminium Stewardship Initiative (member)
- Responsible Steel (member)
- Fair Wear Foundation (Mark Held, Executive Board)
- The Microfibre Consortium (Board member)
- Federation of European Sporting Goods Industry
- Social Labour Convergence Project
- The Policy Hub
- Textile Exchange MoU in place.

Activities in 2020

Market research

Overview

The role of market research at the EOG is to support our members and the wider industry with insight and research covering sales – both brand and retail in the outdoor segment, industry trends and developments, and consumer behaviour and attitudes. The work is cross functional and provides support to the wider EOG team too, such as the CSR and sustainability and retail activities, and to the It's Great Out There Coalition.

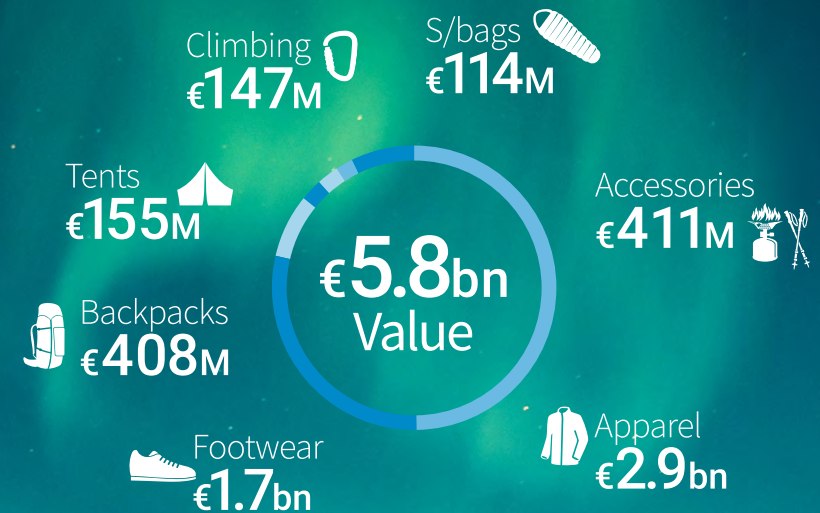
We manage both ongoing projects such as State of Trade (brand sales) and The Retail Point of Sale Report (retail sales), as well as ad hoc projects.

In 2019, we made significant investments in the systems and technology for both the State of Trade and Retail POS report. We are extremely pleased that we were able to fund and complete these improvements in 2020, despite the obvious challenges. These enhanced platforms pave the way for a new phase of reporting in the future.

As well as running projects in house, we have also developed strong research partnerships over the years with a number of well-established research companies, including the Foresight Factory, infacta, hachmeister + partner and more recently Sport Marketing Surveys. These partnerships provide cost effective solutions for our projects.

The research work is led by Pauline Shepherd, our Head of Market Research.

State of Trade Outdoor Market 2019





Brand

State of Trade (SoT) – brand sales (sell-in) report

This is the main industry report for Europe, measuring the brands' sales of outdoor products. The report measures wholesale value and units by season for seven product categories, which are split into 48 product sub-categories.

Despite the challenges of 2020, the majority of the EOG members were still able to deliver sales figures for 2019 and the report was delivered in line with previous years. This is a credit to more than 75 companies which support the project and shows the value of the report to our sector.

In 2020 the following developments were implemented:

- New data collection tool to help improve the process and data quality
- Pilot of new product features in apparel, footwear, and backpacks and luggage
 - Apparel jackets – waterproof, 3 in 1, softshell, insulated down and synthetic
 - Shoes – trail running and multi activity
 - Backpacks – up to 25 litres, 25 to 40 litres and over 40 litres
 - Luggage – wheeled and non-wheeled
- New reporting portal with charts and improved data analysis function.

Retail

Outdoor Retail Benchmark Report

This report is a measure of retail sales provided by EOG retail members. Point of sales figures are collected and aggregated to create a benchmark report. 12 sport segments are measured, including outdoor, sports fashions, winter sports, running/walking, and water sports.

There is a detailed product breakdown for the outdoor segment and in the other segments the report covers the three main categories – apparel, footwear and hardware.

In 2020, the following developments were implemented:

- Launch of new data collection and reporting portal
- Shift to monthly data collection from quarterly to provide more real time sales figures.

A packed society and health panel at the ISPO Academy 2020.



Activities in 2020

Consumer research

A significant consumer segmentation study was undertaken in 2020, with 7,000 active consumers completing the survey in Europe. 1,000 consumers in each of the seven of the largest outdoor markets took part – from the UK, France, Germany, Spain, Italy, Poland and Sweden.

The wide-ranging survey explored participation levels in different outdoor activities in detail, and identified variations by country, age, gender and other demographic measures. The research also explored the barriers that prevent people getting active in the outdoors and identified opportunities for overcoming those.

The study was completed for both the EOG and in support of the work of the It's Great Out There Coalition, and the output of the study is being used across a number of initiatives to help support and increase participation levels in outdoor activities.

Ad hoc projects

In response to the pandemic, the EOG undertook market impact research to understand and track the impact of COVID-19 on the sector, and to understand how we could best help the members and the wider outdoor industry during the crisis and beyond.

Secondary research and knowledge resources

During 2020, we continued to support our members with data from secondary research and share this using a number of tools, such as the research library, newsletters, webinars and presentations.

Market Research Advisory Group (MRAG)

The MRAG continued to provide research strategy support and was integral in helping to develop the new reporting features for State of Trade implemented in 2020 (as outlined above). We have good country/regional representation, with eight member companies being part of this, along with board support. We are grateful for the time and support that these colleagues give to this group.





Public affairs

Our public affairs work was vital during 2020. We now have well-established connections and networks at all levels of policy making in Europe and these proved to be of great value. On one hand, we were able to keep our members updated with timely and relevant information and insights as the pandemic developed. On the other, we were able to (and will continue to) play an important role on behalf of our sector in planning for the recovery once the immediate crisis is over.

As in previous years, our public affairs activities are undertaken directly, through the efforts of the It's Great Out There Coalition, and in collaboration with partners such as the Federation of the European Sporting Goods Industry (FESI) and the Fair Wear Foundation (FWF). This work is led by our President Mark Held and General Secretary Arne Strate, and, for their own areas of expertise, our individual teams also make essential contributions, reflected below and elsewhere in this report.

FESI

EOG President Mark Held plays a very active role at FESI and is both its Vice President and Treasurer/Executive Committee member. FESI has well established work streams that address a range of topics and we contribute fully to those 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.

As well as Mark Held's roles, the EOG currently has the following representatives on FESI committees:

- Product Compliance Steering Committee – Dr Jane Turnbull
- Corporate Responsibility Steering Committee – Dr Jane Turnbull
- Digital Steering Committee – Arne Strate
- Trade Steering Committee – Arne Strate
- Sport Steering Committee – Arne Strate.

FWF

Our policies on social responsibility, and through those our work with the Fair Wear Foundation, have taken on greater significance during the last 12 months and came into sharp focus in Germany in particular in September, with the launch of the country's 'Green Button'. The Green Button recognises the achievement of FWF members that have gained 'Leader Status' and illustrates the high international regard in which the organisation is held. Meanwhile, there is increasing discussion in Brussels about legislation relating to basic CSR issues and FWF/FESI and the EOG are well placed to engage with policy makers about this. Mark Held is Chair of the non-executive FWF Board.





Retail

In January 2020, Peter Ottervanger took on the role of Head of Retail on a part-time basis. Due to the COVID-19 outbreak, we saw an exceptionally difficult year, with multiple lockdown periods in numerous markets impacting the retail sector. Significant changes in consumer shopping behaviour have led to increased accelerated growth in digital channels. Overall, the retail market can be described as a mixed bag, with specialist players and digital channels winning market share, while brick and mortar retailers were under severe pressure.

In February 2020, a three-year strategic retail plan was developed and presented to the EOG executive team, to deliver an integrated approach with all departments. As part of this work, we organised, in cooperation with Cube Retail, a training session on retail practices and KPIs. This session was well received and supported our overall goal.

The EOG's retail focused projects during the year did not progress at full pace in all cases, but engagement grew, ensuring that retail now has a clear representation on an industry level.

We gained two new retail members in 2020 – the Intersport Global organisation (over 7,000 doors world-wide) and Bergzeit (a European online retailer with a small brick and mortar business). Our 13 retail members represent 18 organisations from around Europe and for a range of projects, they are supported by numerous non-members. We calculate that this retail community equates to over 35% of the European outdoor retail market share.

Retail members

Based on the belief that there are many areas in our industry which can benefit from pre-competitive networking, we provide the 'FOR – Future of Retail' meetings for the EOG's retail members.

FOR offers the opportunity to meet peers from retail companies regularly and debate topics from a retail perspective. We began 2020 with a successful get together, facilitated by Schuster in Munich, with a store walk through, presentation and dinner during ISPO Munich. Rainer Angstl, also an EOG Board member, and the Schuster family, hosted the event.

Our intention was to meet again at OutDoor by ISPO, but that couldn't go ahead due to the show's cancellation, and neither can our intended meeting at ISPO Munich 2021 take place.

Retail Meets Brand

Go to Market Cycle

During second part of 2020 a series of meetings were held to discuss the go to market schedules in our industry. This project started with an EOG initiated debate about the need to get delivery schedules closer to consumer and market needs and the real spring and winter seasons. During the sessions, we found that some brands have already adapted their delivery schedules, mostly pushing them out by one month and this lead is being followed by more brands.

The second part of this project is to focus on the 'pain points' in the value chain.

Purpose of the project: Create an industry platform to discuss the go to market cycle and subsequently/consequently product delivery flows. Identifying pain points in the value chain between retail and brands is an integral part of the workstream, with the goal to find collective solutions for a more sustainable approach.

The following project steps have been taken:

- Development of position paper
- Industry call with 25 CEOs/GMs from retailers and brands
- Workgroup established with 10 representative of retail – and brand – members
- Industry survey on delivery schedules for apparel, footwear, accessories and hardgoods.
- Series of debates about the need for changes to industry practices.

During 2021, the aim is to continue these conversations and get to a common viewpoint on cooperation within the value chain.

The Retail Meets Brand project series is also open for non-members to participate in the and we communicated this through our networks. Because retail is in many aspects a 'regional' business, some retailers who play a key role as B2C interfaces in their markets aren't necessarily interested in a membership on a European level. Stretching the access in this context offered the opportunity to engage positively with these retailers and additionally gave them the potential to learn more about the work of the EOG and the benefits of joining.



Outreach with FGHS

In conjunction with the Dutch Sport and Outdoor association (FGHS), the EOG retail team initiated a digital event that brought together 30 outdoor brands and retailers to discuss go to market behaviours and pain points in the value chain. During the event, we also shared information about EOG work streams, presented by our Head of Research and the It's Great Out There Coalition.

ISPO and the EOG

Together with the ISPO management team, we started a series of conversations to create more engagement with the wider retail community. As a spin off, we are discussing a project from two companies to reinforce the positioning of qualitative European multi brand retail. The first presentation has been planned for ISPO Munich Online.

RMB Data

The goal is to create the vision of a common standard for the sports and outdoor industry and with this in mind, we've pushed forward the dialogue regarding optimised processes. We want to build a solid foundation on existing structures, which helps to accelerate the B2B2C data exchange processes.

Due to COVID-19 and multiple staff changes on both retail and brand sides, this project has been mostly on hold. Towards the end of 2020, this topic became more relevant and was prominent during an industry call to align thinking on more standardisation of guidelines between retailers and brands. The project will be restarted during 2021.

Outdoor Retail Benchmark Report

The objective of the Outdoor Retail Benchmarking Report is to deliver sell out data, turnover per country, along with market shares, key market developments, and other metrics. Our aim is to stay ahead of the curve and turn the current 'present-to-past' perspective into a more 'future-to-present' oriented point of view. The approach, developed in close working relationship with the EOG's Head of Research, is to develop the report into a quarterly industry reference point, combining retail sell out data, 'ears on the ground' comments from retail CEOs, and consumer survey information.

The cooperation with our partner hachmeister + partner, has continuously demonstrated the increased relevance of this project and opportunities to build on the relationship.

Retail and CSR/Sustainability

The EOG retail team has been participating in a number of activations and industry calls. We have supported a new project to bring together value chain members to support circular initiatives and due to this, we have signed three retail members. The kick-off is planned for early in 2021, with the goal of aligning retailers, brands and suppliers for further testing of circular initiatives. Potential funding from the Dutch government for the year will be discussed.

Retail training on sustainability basics and standards has been discussed with an external agency, but due to budget limitations, has not yet got off the ground.



EOG Head of Retail Peter Ottervanger speaks during the outdoor industry press conference at ISPO Munich 2020.

Activities in 2020

European Outdoor Summit

As with most events in 2020, the European Outdoor Summit in partnership with Outdoor Sports Valley, could not go ahead as planned. Once it is safe to do so, we are certain that the desire to meet up and interact will be as great as it has ever been, when there will be many insights and stories to share. We are already working behind the scenes to develop ideas for the return of face-to-face events in the future.

The European Outdoor Conservation Association

Like most organisations, the European Outdoor Conservation Association (EOCA) had to adapt quickly to the exceptional circumstances of 2020. With the support of its members, the association reshaped its plans and approach to engagement and fundraising, always keeping a focus on the conservation and protection of the great outdoors, its wildlife, landscapes and habitats.

The core team of Tanya Bascombe, Catherine Savidge, Cat Barker and Sharon Bianchi led work during the year, supported by EOCA President Perry Laukens, the EOCA Board and a group of scientific advisors.

EOCA funded Conservation Projects

In 2020, nine projects were supported with funding through EOCA, plus an additional seven projects with support from Summit Members. A record number of project applications were received, in total over 440 across the two funding rounds. Voting also reached a new high during the October project funding round, with nearly 44,000 cast within two weeks.

All projects funded by EOCA in 2020 reported strong progress, despite having to make adjustments to adhere to the relevant national COVID-19 guidelines.



EOCA smashed its Plastic Free: Mountain to Sea target – image Ian Lean.

Sustaining and Summit Members

Summit Members

EOCA's Summit Members provide funding for their chosen projects through the association. In 2020, initiatives were supported by POMOCA, KEEN, Smartwool and Ortovox, and fellow Summit Member The North Face identified three projects that will receive funding from The North Face Explore Fund through EOCA.

Sustaining Members

For the last five years, a select group of Sustaining Members has been leading the way within the outdoor industry, by collectively financing the running of EOCA. This significantly increases the impact of the association, by allowing 100% of membership fees to be put into conservation projects.

To date, since the formation of EOCA, over €3.7m of funding has been given to conservation projects around the world.



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Projects were supported by EOCA around the world.



Plastic Free: Mountain to Sea

EOCA's clean-up target for the Plastic Free: Mountain to Sea campaign was not only reached, but also surpassed by over 1,000km. The target had been to clear 3,000km of habitat, trail and beach of plastic waste and pollution. This was achieved and exceeded through the funding of conservation projects, and through actions taken by EOCA members themselves, which succeeded in clearing a total of 4,183km.

Membership

EOCA now has 159 members, welcoming 10 more in 2020 – Armbury Inc, Borealis Snowboards, Performance Days, KAVU Inc, Kutupayisi Tekes, Lesovik, Merrell, Powertraveller International, Sport Conrad and Thermacell Repellants Inc. The association also started working with Outdoor Gear for Good as a new trade partner, providing valuable support through the EOCA Conservation Fundraisers.

Members' commitment to conservation during such a difficult year enabled EOCA to continue directing funds to vital on-the-ground projects, tackling urgent conservation issues around the world.

Online Conservation Fundraisers

EOCA fundraising went online for the first time in June 2020, raising over €19,000. A second Conservation Fundraiser was held in November as a Green Friday event (an alternative to Black Friday) and raised over €56,000.

Once again, association members provided excellent support and contributed in various ways, including percentages of online sales given to the fundraisers and the donation of outdoor products. Outdoor Gear for Good teamed up with EOCA to sell the gear on its eBay shop, giving 100% of those sales to both fundraising rounds.

The combination of the two online events and a fundraiser held at ISPO in February 2020, resulted in over €100,000 being raised for conservation during the year, double the total for 2019 (which was a record amount itself). This puts EOCA in a strong position to fund more vital conservation projects in 2021, and details of the next major focus will be announced early in the year.

To find out more about the European Outdoor Conservation Association, visit www.eocaconservation.org and if you would like to know more about membership and getting involved in the association's conservation work email info@eocaconservation.org.



It's Great Out There Coalition

The It's Great Out There Coalition can look back on a challenging, but also successful 2020. Despite the exceptional circumstances, the core message of #itsgreatoutthere resonated more than ever, and by adapting its approach and plans, the coalition was able to play an important role in the outdoor industry's response to the pandemic, led by Policy Officer Margo de Lange.



#Outdoorsathome

As lockdowns came into force around Europe, the coalition's stated objective – 'Getting Europe Active Outdoors' – suddenly became a problematic and controversial statement. The team quickly adapted to launch the #OutdoorsAtHome project. This specific campaign was designed to motivate citizens who have a love for the outdoors, helping them to stay active and busy during the difficult times, while also highlighting coalition members' own initiatives. The campaign was aligned with #BeActiveAtHome, which was revealed by the European Commission, and for the UK, with the 'GetOutside Inside' campaign by Ordnance Survey, in collaboration with the Outdoor Industries Association (OIA).

Consumer research

The It's Great Out There Coalition worked closely with the EOG and Foresight Factory on a major consumer participation research project (see Market Research section). Across Europe, the survey results identified a greater appetite to engage with nature post COVID-19, and revealed very positive overall sentiments towards outdoor activities among populations everywhere. The coalition used the insights from the research in communications during the year and to inform planning for the future.

#Itsgreatoutthere micro-grants

In partnership with the EOG, the coalition committed €10,000 to award 10 #itsgreatoutthere 'micro-grants' of €1,000 each to the most compelling proposals from non-profit organisations, for the benefit of those in need. Grants were awarded with diversity in mind and to help young people based in the inner cities, or living in circumstances that mean that getting access to the hills and mountains is difficult.

Public affairs

The It's Great Out There Coalition plays an important role for the industry in European public affairs, promoting the value of outdoor participation to policy makers. This continued to be vital during 2020, parallel to the EOG's own work with stakeholders and partners (see Public Affairs section). This ensured that the sector was part of the conversation in the political response to the pandemic.

European Week of Sport (EWoS)

The coalition is an official partner of the European Week of Sport and takes the lead on behalf of the industry to make sure that the outdoors is prominent in activity for the initiative from 23-30 September each year. Inevitably, EWoS could not go ahead as planned in 2020. However, the European Commission adapted its approach and hosted content online. With support from its members (in the form of prizes), the coalition launched #OutdoorSmiles, a positive and engaging campaign that went live to coincide with EWoS, but ran for a full month.

Mind, Body, Boost Erasmus+ funding

The It's Great Out There Coalition is an active partner in the Mind, Body, Boost programme that is being led by Trinity College Dublin. The project will be a European-wide collaboration in support of EU strategies, addressing areas of social inclusion and equal opportunities. The aim is to encourage inclusivity and equality through sport, by creating a safe health and fitness environment for third level students who need physical and mental health support. In October 2020, Mind, Body, Boost was awarded €391,000 of Erasmus+ funding, and the coalition will be involved in the ongoing development and delivery of the initiative, ensuring that outdoor participation is a core element.

SHARE initiative

Launched by the European Commission in 2018, the SHARE initiative exists to raise awareness of the role of sport and physical activity in the context of regional and local development. SHARE aims to ensure that this role is adequately taken into account as part of policy and investment decision-making at European, national and regional levels. The coalition is a member of the initiative and plays a full role in its work. That continued throughout 2020 and during the year, the coalition helped to write a position paper about the impact of COVID-19 on the sports sector.



The Power of the Outdoors

The coalition was a partner in the organisation and delivery of The Power of the Outdoors, a virtual seminar that was held in October. The event gathered 130 participants from across Europe to discuss and explore the potential for health enhancing physical activity in natural settings to help deliver key EU policy objectives. The event showcased examples of projects and research outcomes, case studies of regional development through the outdoors in action, and included keynote speakers, discussion panels and group workshops. The Power of the Outdoors was very well received, and kick started a process to develop a series of policy position papers to highlight the impact and further potential of outdoor sports.

Membership

There was a mixed picture with coalition membership. Three members left during 2020 and one new full member joined, along with 15 associate members. The coalition plans to introduce a supporting member category in 2021, with a lower annual fee than full membership, helping more companies to access the activities and benefits of association with the #itsgreatoutthere campaign and other coalition work.

Activity Days concept

During the second half of the year, the coalition developed proposals to link membership more closely to outcomes through a concept named Activity Days, which will quantify how investment directly delivers days of outdoor experiences to target citizens. The idea was welcomed by members at the coalition's general assembly and will be refined and launched during 2021.

To find out more about the It's Great Out There Coalition, visit www.itsgreatoutthere.com and if your organisation would like to get more involved in the work of the It's Great Out There Coalition, email info@itsgreatoutthere.com.

IGOT grant recipient Hej främling – Hey stranger in Sweden.



Accounts for 2020



Appendix 1: Accounts For 2020

Income and expenditure account for the year ended 31 December 2020

	2020		2019	
	€	€	€	€
Subscriptions	375,750		390,000	
Commission from Shows	550,558		1,097,972	
European Outdoor Summit	0		159,346	
Misc Income	4,823		151	
BOSS (Erasmus+ project)	12,984		0	
Single use plastic project	1,200		66,500	
		945,315		1,713,969
Less: Expenditure				
Subscriptions	17,367		30,459	
Payroll	-120		1,683	
Travel and Accommodation	12,367		23,704	
Bank Charges	2,324		2,176	
Exchange rate differences	0		1,292	
White Moss Consultancy	745,246		529,165	
Sundry expenses	1,389		1,846	
HR expenses	2,048		13,062	
Legal and Professional Fees	23,249		7,184	
Accountancy	4,303		5,210	
Marketing and Development	156,104		289,052	
CSR	108,348		170,425	
Market Research	115,681		135,683	
Projects	72,001		182,481	
		1,260,307		1,393,422
OPERATING SURPLUS FOR THE YEAR		-314,992		320,547
Other Receipts and (Expenses)				
Bank Interest Received			0	
		0		0
Taxation	75		305	
Revise tax provision		75		305
TOTAL SURPLUS FOR THE YEAR		-315,067		320,242



Appendix 1: Accounts For 2020

Balance Sheet at 31 December 2020

	2020		2019	
	€	€	€	€
CURRENT ASSETS				
Debtors	33,611		60,936	
Prepaid expenses	78,091		129,000	
EOCA	0		0	
Cash	0		0	
Bank	563,421		800,254	
		675,123		990,190
Creditors – amount falling due within one year				
Accrued expenses	1,000		1,000	
Other creditors	2,500		2,500	
Taxation provision	0		0	
		3,500		3,500
NET CURRENT ASSETS		671,623		986,690
TOTAL ASSETS LESS CURRENT LIABILITIES		671,623		986,690
RESERVES				
Surplus brought forward		986,690		666,448
Surplus for the year		-315,067		320,242
Cumulative surplus		671,623		986,690

In accordance with instructions given to us we have prepared without carrying out an audit the annexed financial statements from the accounting records of the European Outdoor Group and from information and from information and explanations supplied to us.

Marion Green Accountancy Limited Chartered Certified Accountants
Wolf Howe, Whinfell, Kendal, Cumbria, LA8 9EL



Appendix 2: Audit Report



Based on Article 17 of the bylaws of the European Outdoor Group

Minutes

The Audit meeting for the year end accounts of the European Outdoor Group (EOG) for the year 2020

Participants:	Karl-Heinz Maurer	Auditor
	Mark Held	EOG President
	Arne Strate	EOG General Manager

The audit took place in calendar week 3/2020 by a virtual exchange in the office accommodation of MAURER Unternehmensberatung in Erding. The balance sheet and the profit and loss account with the explanatory notes for the year 2020 were submitted with the ACTUAL figures and the revised BUDGET estimate for the year 2020, as well as the bank and accounting records for the audit year.

The explanatory notes to the annual financial statement 2020 included the profit and loss account in an accounting form, i.e. the operating costs and the taxes in addition to the determination of earnings. The revised BUDGET figures were compared to the ACTUAL figures.

The accounting company Marion Green Accountancy Ltd in Kendal, UK prepared the accounts. The budget overview was prepared in the form of a profit and loss account, which is produced directly from the accounting records.

As has been the case since 2010, all the services for the EOG members in 2020 were fulfilled by White Moss Consultancy Ltd (WMC) and therefore nearly all the administration expenses fall to WMC and WMC invoices its service fee and corresponding expenses to the EOG.

The following audits were carried out with the result shown below:

The bank balances as of 31.12.2020 were checked with the reported positions of the bank credits in the explanatory notes to the annual financial statement. They match the account balances shown there.

An audit of the cash in hand as of 31.12.2020 was superfluous, as no cash is kept, but cash expenditure is initially disbursed privately by the general manager / WMC and then charged to EOG.

The expenses were retraced at random by means of copies of the original documents and payment records and the correct accounting treatment was checked at random. The audit resulted in no exceptions at all.

Payment dues were audited and comprised 97 members (ten of them retailers), whereof no one joined and three left in 2020. Seven of the invoiced membership fees were still outstanding at year end and are reminded, same as two outstanding fees for the Single Use Plastic project.

As limited to COVID-19 Outdoor by Ispo had been cancelled and only income from Ispo in January could be generated. These payments comply with the contracts.

Conditioned by the COVID-19 lockdown the EOG Budget for 2020 had to be revised, which was approved by the board on April 18, 2020. This revised budget was compared with the actual figures according to the 2020 accounting and explained in an extra Budget Variance Report.

The differences were accounted for on the revenue and expenditure side.

The total result of -T€ 315 was better than the revised plan of -T€ 352 as feasible savings potentials were employed.

But not all was economised. As an ad-hoc-reaction to COVID-19 an additional retail survey in seven countries was ordered for T€ 50 and projects like IGOT and Sustainability Charter were even more supported than planned to keep them running.

By more income from a successful Ispo in January and higher membership fees by fewer exits than worried, these expenses could be more than absorbed.

Overall it should be stated that the budget estimate was adhered to in the main due to consciously thrifty financial management with the various items, and results in a tolerable loss of -T€ 315 for the year 2020, which can be covered by the reserves.

On the basis of the result of my audit, I find that the accounts give a true and fair view, in accordance with general accounting practice, of the state of the organisation's finances as at 31st December 2020. Furthermore I declare that General Manager, the Treasurer and the Managing Committee of the EOG have managed the financial affairs of the organisation in accordance with the relevant bylaws and with financial prudence.

Erding, 22.01.2021
Karl-Heinz Maurer
Auditor



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