

2017 Summer Outdoor Retailer Trends



Outdoor Industry Sales \$18.8B

Dollars **-2.8%** | Units **-4.0%** | Average Price **+1.2%**

Outdoor Industry Channel Performance

Athletic Specialty/Sporting Goods **\$12.7B** | **-5.2%**

Outdoor Specialty **\$4.0B** | **+0.6%**

Sport Specialty E-commerce **\$2.1B** | **+6.1%**

Gender Performance (Apparel & Footwear)

Men's **\$8.2B** | **+1.6%**

Women's **\$4.2B** | **-6.7%**

Kids' **\$1.4B** | **-12.0%**

Supercategory Performance

	+9.4B	+4.6B	+3.8B	+1.1B
APPAREL				
FOOTWEAR				
EQUIPMENT				
ACCESSORIES				
YOY % CHANGE	-0.9% ▼	-5.8% ▼	-3.1% ▼	-5.3% ▼

Top 5 Outdoor Categories

Categories	Dollars	YOY % Change
Outerwear	\$2.9B	+5.8% ▲
Performance Running Footwear	\$2.6B	-9.7% ▼
Sportswear Tops	\$1.8B	-3.3% ▼
Active Bottoms	\$1.8B	-14.1% ▼
Outdoor Footwear	\$1.3B	+4.8% ▲

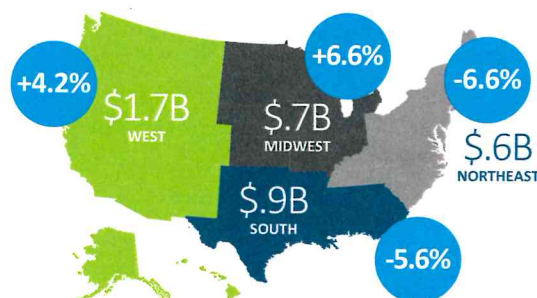
Source: The NPD Group/Retail Tracking Service, Outdoor Industry View (Athletic Specialty/Sporting Goods, Outdoor Specialty, Sports Specialty E-commerce), 12ME May'17

*Boats = Canoes, Kayaks, SUPs

Outdoor Specialty & E-commerce

Categories	Dollars	YOY % Change
Outerwear	\$1.7B	+3.5% ▲
Sportswear	\$624M	+5.6% ▲
Outdoor Footwear	\$452M	-0.7% ▼
Active Bottoms	\$259M	+6.1% ▲
Boats*	\$231M	-5.1% ▼
Headwear	\$226M	+5.4% ▲
Handwear	\$211M	+4.2% ▲
Backpacks	\$210M	+3.7% ▲
Bottoms	\$192M	+3.0% ▲
Socks	\$161M	+7.6% ▲
Cold Weather Undergarments	\$127M	+3.3% ▲
Performance Running Footwear	\$123M	-0.2% ▼
Tents	\$106M	+4.6% ▲
Instruments	\$100M	-14.5% ▼
Sunglasses	\$99M	-5.4% ▼

Regional Performance (Outdoor Specialty)



The NPD Group helps you understand the impact these trends will have on the outdoor industry and your business and products. NPD's industry analysts are ready to work with you to give you the winning advantage you need to grow your business.

Sales for the combined outdoor specialty and outdoor (sport specialty) ecommerce channels during the past 12 months paint a positive picture for several categories from outerwear and active bottoms to handwear and socks. However, strong growth in the rolling year is beginning to slow down in hydration and other categories. This slowing is particularly evident when comparing the 3 months ending May 2017, as outlined in the chart below. Sales shown are in dollars with corresponding growth for the most recent 12 months, during the fall and spring seasons. Many key categories are also affected by weather patterns, category saturation, and shifting consumer trends.

Outdoor Specialty & E-commerce YOY % Change Trends

Outdoor Categories	Dollars	YOY % Change 12ME May'17	YOY % Change Fall (Aug – Oct'16 vs. Aug – Oct'17)	YOY % Change Spring (Mar – May'16 vs. Mar – May'17)
Outerwear	\$1,709,069,414	3.5	9.6	8.8
Outdoor Footwear	\$455,192,785	(0.7)	(1.2)	(0.9)
Sportswear Tops	\$404,434,774	6.8	10.2	1.0
Sweats/Active Bottoms	\$244,375,377	6.1	14.6	4.8
Boats (canoes/kayaks/SUPs)	\$243,059,745	(5.1)	(0.0)	(12.1)
Headwear	\$214,392,329	5.4	15.0	(4.3)
Handwear	\$202,628,698	4.2	(0.1)	4.7
Backpacks	\$202,798,762	3.7	3.8	(1.6)
Sportswear Bottoms	\$186,200,014	3.0	5.7	(5.2)
Socks/Hosiery	\$149,244,792	7.6	8.8	11.7
Casual Footwear	\$145,416,528	(1.8)	(0.7)	(7.4)
Cold Weather Undergarments	\$122,417,697	3.3	5.0	5.6
Performance Run Footwear	\$122,881,188	(0.2)	0.9	2.4
Tents	\$101,370,252	4.6	5.8	(0.7)
Instruments	\$116,819,188	(14.5)	(6.6)	(12.3)
Sunglasses	\$104,376,210	(5.4)	2.8	(8.3)
Hydration	\$70,255,014	22.1	24.3	6.1
Climbing Gear	\$77,940,453	6.1	12.5	2.5
Sleeping Bags	\$75,439,690	3.9	16.9	(10.9)
Sport Racks	\$74,033,133	(1.2)	(1.3)	(9.8)

Source: The NPD Group/Retail Tracking Service, Outdoor Industry View
(Outdoor Specialty, Sports Specialty E-commerce), 12ME May'17 / 3ME Oct'16 / 3ME May'17

Learn More

For more information, contact The NPD Group at 866-444-1411 or email contactnpd@npd.com.
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