Sustainable Consumer Behaviour in the UK

-In general and in relation to outdoor equipment and vehicle accessories-

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Abstract

Sustainability is becoming an important factor to consider while buying different products such as outdoor equipment and vehicle accessories. Also there is a growing awareness that business side should take an important role in promotion of sustainable consumer behaviour.

This paper investigates sustainable consumer behaviour in general and in relation to outdoor equipment and vehicle accessories in the UK. It explores sustainable consumer behaviour through 50 phone interviews with retailers in outdoor equipment and vehicle accessories over the UK. The findings reveal there is a large awareness on sustainability issues in the investigated segments. Also there is willingness to pay more up to 20 % more for products with sustainability features in the outdoor equipment and vehicle accessories. Moreover projections on development of sustainable consumer behaviour are very positive. Business plans for more sustainable consumption include an increase in number of products with sustainability features and following manufacturers.

The paper concludes with some reflections on how sustainable consumption behaviour should be promoted from the business side and gives recommendations for the businesses in the investigated segments.

Keywords: sustainable consumer behaviour; the UK; outdoor equipment; vehicle accessories; interviews.

1.INTRODUCTION

Every day, sustainable consumption and sustainable production are becoming more and more important and at the same time they are helping us to move toward sustainable development. Over the years, majority of people have realized that their purchasing behaviour had a direct impact on the global warming, climate change and other ecological problems Michel et al (2001). Maybe this is one of the reasons why people are becoming more and more aware about sustainable consumption, and its positive impact on the whole society. In our opinion consumers are the main drivers that will help us to move towards more sustainable production and consumption. This is one of the reasons why we chose to do a research on the sustainable consumer behaviour in the UK because we think that sustainable development can help us to improve the quality of life of present and future generations.

The purpose of this paper is to determine sustainable consumer behaviour in the UK in general and in relation to outdoor equipment and vehicle accessories. We think sustainable consumer behaviour is of extreme importance for the future as consumers are drive force of consumption. In this paper we will try to answer through secondary and primary data:

- what is level of environmental awareness in the UK
- where is the UK among other countries in sustainable consumer behaviour
- how important is sustainability in consumer's purchasing decision making in general and in the outdoor equipment and vehicle accessories segment
- analyze sustainability as a trend few years ago and now
- check what are plans from business perspective in terms of sustainability

1.1.What is sustainability?

Sustainability plays an important role in our every day life. Hundred years ago people did not know much about sustainability, but today sustainability is a wide ranging term that can be applied to every segment of our life.

The concept of sustainability was first discussed in 1983 in corporate agenda via the UN Commission on Environment and Development, where the term of sustainable development was defined as development that "meets the needs of the present without compromising ability of future to meet their own needs" (United Nations, 1987). Today they are many discussions and debates about sustainability, and sustainable development describing various approaches and solutions, but when it comes to implementation rare are those who follow those sustainable rules and principles. Whether we want to accept or not, sustainability is global issue that should concern all of us, and that we should work together towards achieving global solution.

Beside the widely accepted definition there are also three types of sustainability and they are: social, economic and environmental as stated (United Nations General Assembly, 2005).

Social- Social sustainability is related to retention of social capital. This social capital according to many scholars is called moral capital. To have social sustainability achieved it is required to share values and provide equal rights as well as to promote cultural and religious interactions by the society (Wiley, 2009).

Economic- One of the most accepted views on economic sustainability is maintaining the level of capital which can be easily explained by the Hick's definition of income where the amount of income that person can consume and be as well off at the end of the period (Burgess,2003).

Environmental- Environmental sustainability includes natural capital such as water, minerals, ecosystems which are often converted to economic capital (Nordhaus, 1994).

In this paper environmentally friendly products mean a wide range of different sustainability features incorporated not just environmentally friendly features. We have done this as many studies that are investigating sustainable consumer behaviour name products that have incorporated sustainability features environmentally friendly products. In our paper as well, environment is considered as a wide concept including all three perspectives on sustainability.

1.2.What is sustainable consumption?

Today there are many signs that consumption issues are becoming of central concern for business. Currently we are living in an era in which global consumption patterns are unsustainable. In order to avoid this and bring global consumption to a sustainable level many changes are required both from consumers and producers. Changes are required but not just in technology, it will also be required in consumer lifestyles, including ways in which consumers choose and use products and services. This is a big challenge, but we think that business should take a leading role and try to move toward more sustainable levels and patterns of consumption. One of the propositions how this could be done is that business should use their current business processes such as innovation, communication and marketing and by working together with consumers, governments and stakeholders they can define and achieve more sustainable lifestyle (WBCSD, 1997).

To meet the challenges of sustainable development, business should help consumers to choose and use their goods and services sustainably. In order to do so, business should create sustainable value for their consumers offering them products and services that will meet their functional and emotional needs but at the same time respecting environmental limits and common values (WBCSD, 1997).

When global drivers of consumption come to the role, business should consider rapid global population growth, because world population is projected to reach 9 billion by 2050 (UNDP, 2008).

1.3.Why there is a need for sustainable consumer behaviour?

Recent studies show that we are already exceeding the Earth's ability to support our lifestyles, and have been doing so for approximately twenty years (WWF, 2006).

Also there are predictions that the supply of energy and material resources needed for industrial growth, such as natural resource consumption is expected to rise to 170% of the Earth's bio-capacity by 2040 (WWF, 2006). So this is a big challenge and task for us, it can be solved only if we see the importance of sustainable consumption.

The projections mentioned previously should help us to answer the question: Why do we need sustainable consumption?

However it is good to know that consumer's attitudes and behaviours are changing over the last two decades. Consumers are increasingly concerned about environmental, social and economic issues, and increasingly willing to act on those concerns. According to recent studies 96% of

Europeans say that protecting the environment is important for them personally. Two-thirds of this group say that it is “very important” (European Commission, 2008). In the UK, 18 % of consumers are willing, able and motivated to take action on environmental issues.

The role of consumers and their willingness to change is a key driver in this process.

2.LITERATURE REVIEW

2.1.Available surveys and studies in the UK- National geographic surveys

For our study it is important to see how the UK is ranked in worldwide studies and surveys on sustainable consumer behaviour. One of these studies is Greendex.

National Geographic conducted Greendex survey in January 2009. This survey is a world wide tracking survey on consumer choice and the environment. One of the findings of this survey is that consumers are paying more attention to sustainability as their knowledge improves.

This survey tracks behaviour in 65 areas related to four major categories housing, transportation, food and consumer goods (Greendex, 2009).

When it comes to overall results for the 14 countries included in this survey in 2008, overall results showed there is an increase in environmentally friendly consumer behaviour in 2009.

This tells us there is an upward trend in sustainable consumer behaviour. Overall green index for Great Britain was a slight increase from 2008 to 2009 from 48.2 to 49.4 points, what ranked it at the 13th place out of 17.

According to this survey (Greendex, 2009) there are two main reasons for the improvements of results. These are cost considerations and environmental concerns.

2.2.DEFRA survey from 2007

DEFRA is the Department for Environment Food and rural Affairs in England and it released a Survey of Public Attitudes and Behaviours in England in 2007. This study covers what customers think and how they behave in relation to different environmental issues. It covers for each different section attitudes, behaviours and barriers. In this paper we will summarize findings (DEFRA, 2007) from three different sections that are relevant to our topic. These will be attitudes and knowledge in relation to the environment, transport and eco-friendly purchasing.

In each section of this survey respondents were asked on their attitudes towards eco-friendly purchasing.

Results showed that 52 % of respondents agreed or tended to agree that they ‘try not to buy products from a company whose ethics they disagree with’. Also 45 % of respondents agreed they would be prepared to pay more for environmentally friendly products’, but at the same time over a quarter disagreed. This shows there is a mix of consumers who would be willing to pay more and those who would not.

To test their attitudes respondents were then asked on their behaviours in eco-friendly purchasing.

We think these results are expected as there in the UK Fair trade development is helped by government programme for sustainable development.

This study also asked on barriers that stopped people from purchasing environment friendly products and the first barrier was price. 47 % of respondents said these products are too expensive. The second barrier was lack of availability with less than 12 % of respondents answering. The third barrier was a lack of labelling.

Again we think that attitude and behaviour gap repeated as larger proportion of respondents said that it would pay and then minority said it would not pay.

3.METHODOLOGY

As our task is to investigate and try to determine sustainable consumer behaviour in the UK in general and in relation to the outdoor equipment and vehicle accessories segment, we can say that we will use both secondary and primary data.

Secondary data will be used to answer questions more in general about sustainable consumer behaviour in the UK. Different studies, books, journal articles and legislature documents will be used (e.g. OECD (Organization for Economic Co-operation and Development) and WBCSD (World Business Council on Sustainable Development)).

We decided to collect data in three different types of stores as we think they are in a close relationship. We collected data through phone interviews in the outdoor equipment (Patagonia’s stores), vehicle accessories (Thule’ stores) and car stores (Toyota’s, Volvo’s and BMW’s).

We think that all the three selected type of stores will give us more knowledge about sustainable consumer behaviour in the outdoor equipment and car and vehicle accessories segment as they are related. For example customers need vehicles to transport their outdoor equipment and they will use vehicle accessories (for example Thule’s) such as bike carriers or ski carriers. Also they need outdoor equipment such as Patagonia’s products to perform outdoor activities. We think that we can get better knowledge if we connect all these three and then draw conclusions.

In addition to phone interviews with retailers/managers we did phone interviews with experts on sustainable consumer behaviour in the UK that will help us to deepen our knowledge and understanding on sustainability and sustainable consumer behaviour in the UK.

As we intend to measure consumer behaviour, through open ended questions we can find out a lot about this from our respondents. To achieve content validity we did literature searches on this topic and pretested open ended questions. Literature searches helped us to have adequate coverage of our topic and pretested open ended questions helped us to get more valid questions.

As this paper investigated sustainable consumer behaviour in the UK in the outdoor equipment and cars and vehicle accessories segment the same set of questions were used in the both segments to get consistent results. Also to improve reliability, a test retest method was used. The same questions we asked to the same group of respondents (retailers/experts) at different points in time. With multiple sources reliability of this paper will be improved.

3.1.Strengths and weaknesses

Given that many discussion papers and studies showed misleading sustainable consumer behaviour through consumer surveys/interviews where consumers tend to show 'right behaviour' and not the real, using phone interviews with retailers can be considered as a strength.

We think that phone interviews with retailers/mangers will answer us through their experience how important is sustainability for customers, are they willing to pay more, how much more but at the same time check through their experience trend, what sustainability feature are customers interested in and similar. Also as this is an opportunity to listen to the business side we can find out about their plans when it comes to sustainability in the next years.

The main weakness of this method is that we are investigating consumer behaviour indirectly by not asking consumers. We will lose opportunity to learn directly from consumers about sustainable consumption in the UK. Moreover we will lose opportunity to learn more about the main barriers for sustainable purchasing behaviour.

All in all, we think that from phone interviews with retailers/managers and experts in this field combined with secondary data, we can learn a lot about sustainable consumer behaviour in the UK. Also we think that our findings can be useful for the business side (producers and distributors) especially in the investigated segments of outdoor equipment, cars and vehicle accessories.

We think that our research is exploratory and unique because as far as we know, no similar study that investigates sustainable consumer behaviour in relation to outdoor equipment and car and vehicle accessories in the UK has ever been done before.

3.2.Sampling procedure and data collection

The study was conducted between 6 and 11 May 2010 in the UK. The population for this study is defined as all retailers/managers of Patagonia's, Thule's, Volvo's, Toyota's and BMW's dealer stores in the UK. Over 260 of these retailers in the outdoor equipment and car and vehicle accessories were randomly selected in the UK. They were interviewed via phone.

During randomization, it was considered to cover larger geographical area in the UK.

From 260 called retailers only 50 of them replied. Initial plan was to conduct interviews with 100 retailers/managers but response rate was unexpectedly low.

Our assumption for this low response rate is lack of knowledge and fear that it will not be done as it should.

From 260 phoned interviewees 170 were selected in the Patagonia's dealer stores, 30 in the Thule's dealer stores, and 60 in the different car dealers' stores. In total 50 interviewees were conducted which gives 20 % response rate. This will decrease our sample representativeness of population in the selected segments.

We need to mention that the lowest response rate was in vehicle accessories stores in the Thule's dealer stores. Out of 30 only 3 replied and it was only 10 % response rate. Our assumption is that sustainability is not developed in this segment and that by conducting these interviews we had a feeling that retailers/managers were even a bit afraid to talk about sustainability. In addition to this, probably they lack of products that have sustainability features incorporated.

From these 50 who responded, 37 were with the selected retailers/managers in the Patagonia's dealer stores, 3 were with the Thule's and 10 were with different car dealers.

This research is of a qualitative type. However we will show graphs with statistics to get better understanding and quality of analysed data. To get more reliable results interviewers were asked the same questions. To increase reliability verbatim answers on all questions are available in the Appendix.

Our phone interviews contained 6 questions for the selected retailers/managers.

4.RESULTS

4.1.Summary of main findings

Sustainable consumer behaviour in the outdoor equipment and car and vehicle accessories in the UK

in the both segments over two thirds of respondents said sustainability is either fairly or very important for customers

in the car and vehicle accessories 'very important' was the most frequent answer with slightly less than half of respondents, while in outdoor equipment 'fairly important' was the most frequent answer with slim majority of respondents

We can say that when combined these segments, sustainability is important for customers while purchasing goods in the selected segments.

in the outdoor segment around 70 % of respondents said that customers are willing to pay more for sustainability features, comparing to 85 % of respondents in the car and vehicle accessories

A customer buying products in these segments is willing to pay more for sustainable features.

the most frequent willingness to pay is up to 5 % more in the outdoor segment and maximum willingness to pay is 20 % more

in the car and vehicle accessories maximum willingness to pay is 10 % more and the most frequent answer was that is hard to quantify how much customers are willing to pay more

When combining these two, we can say customers are willing to pay more but with differences in the maximum willingness to pay, probably due to differences in the base price.

slightly over 50 % of respondents said market for sustainable products or sustainable consumer behaviour developed gradually or in an upward trend direction over the last few years in the outdoor segment, comparing to one third of respondents who said it did not change-'fairly steady'

in the car and vehicle accessories segment 38 % respondents said it developed well over the last few years, while one third said it did not change

When comparing these two we can assume that the outdoor equipment market for sustainable products is more developed.

in prediction of development for this market or sustainable consumer behaviour in the outdoor equipment segment slightly less than 40 % of respondents think it will be an upward trend

In the car and vehicle accessories almost two thirds see it as an upward trend

This difference is probably due to lower development in the past years in the car and vehicle accessories segment. When we combine result, we can say that respondents see it as an upward trend. It is important to mention that mostly price is a barrier for predictions for non development or a very slow development of this market.

Vast majority of respondents in the both segments said customers are interested in sustainability features and they ask about these.

In the outdoor equipment the most frequent sustainability feature is recycling. Other two important features are longevity and whether product is organic.

Fuel efficiency and lower emission are the most frequent features that customers are interested in the car and vehicle accessories segment.

When combining results for sustainability features we can say they are pretty different. Probably this is because of different products offered. But basically for the outdoor equipment customers are interested in recycling, organic and longevity, while in the car and vehicle accessories customers are interested in fuel efficiency (probably due to costs) and lower emission.

Plans from the business side for the future when it comes to sustainability in the outdoor equipment segment were again in recycling direction with around 40 % of respondents. Either to increase more products made from recyclable materials or to improve recycling in their business activities. Other two most frequent plans were for energy saving, probably cost driven and the third group of these plans are related to customer-manufacturer actions. This is an important piece of information for manufacturers.

In the car and vehicle accessories segment a third of respondents said their plans are manufacturer driven. Other third said to increase number of hybrid and fuel efficient cars. We think that in the both segments when combined there is an important message for producers that managers want to increase their offers of environmentally friendly products. Moreover their plans are also manufacturer driven, so it is up to manufacturers to increase their offers of products with sustainability features.

4.2.Comparison of our study results to other study results

Our first question was testing customers' attitudes towards sustainability. Our study results were positive as in the outdoor equipment around two thirds of respondents said that for customers sustainability is either fairly or very important. Similar results were also in the vehicle accessories and car segment where around two thirds of respondents said that sustainability is either very or fairly important for customers. Other studies found similar results when testing attitudes of customers. A study done by PricewaterhouseCoopers (2008) found that over 80 % of 4 thousand customers surveyed, demonstrated awareness and concerns about sustainability issues.

Moreover in a study done by DEFRA (2008) where consumers were asked on their attitudes on eco-friendly purchasing, 52 % strongly agreed or tended to agree that they "try not to buy products from a company whose ethics they disagree with". We think our results even though with much smaller sample are similar with other study results and it shows its larger reliance.

When comparing our results for the second question on willingness to pay for more environmentally friendly products again we have similar results as other studies. In our study we found that over two thirds of customers in the both segments are willing to pay more for environmentally friendly products.

There are similar results in a study done by DEFRA (2008) where 45 % of respondents, strongly agreed or tended to agree that they 'would be prepared to pay more for environmentally friendly products'.

In this study (DEFRA, 2008) over a quarter of respondents disagreed that are not ready to pay more. In our study results are similar as one third of customers are not willing to pay more for environmentally friendly products.

As it is important to have an estimate on percentage that customers are willing to pay we will see also check other study results. In the PwC study (2008) top six UK grocery's products were examined and it was found that price premium was over 40 % for some environmentally friendly products.

In our study we found that maximum willingness to pay for environmentally friendly products is 20 % price premium in the outdoor segment, but it is important to say that this was only 10 % of respondents. On the other hand in the car and vehicle accessories segment maximum price premium is 10 %. The most frequent price premium is 5 % in the both segments.

Moreover PwC study (2008) found that willingness to pay a social or environmental premium on everyday items was closer to c.20 %. This is similar to our results that showed a premium of 20 % for the outdoor segment and a lower premium of 10 % for the car and vehicle accessories segment as prices are larger.

Also one more study showed similar results on customer willingness to pay more for environmentally friendly products. In the EU Commission study (EU attitudes, 2008) results showed that customers would pay more for environmentally friendly products: 7 in 10 said they would be willing to pay up to 20 % more. Our findings about customer willingness to pay more for environmentally friendly products also showed that around 70 % of customers are willing to pay more to 20 % more.

In our third study question retailers/managers were asked about development of this market for sustainable products or in more general sustainable consumer behaviour over the last few years. Over 50 % of our respondents in the outdoor equipment said it developed gradually or it is an upward trend. In the car and vehicle accessories segment around 40 % said it is an upward trend.

For our study it is important to mention that growth is present in Fairtrade and organic clothing purchase in the UK. There is a growth from 2005 to 2008 from 7 % of shoppers to 17 % in 2008 (PwC, 2008).

Also we asked our respondents on development's projection of market for environmentally friendly products. Results showed that over half of respondents said they think it will be an upward trend or a gradually increase in the outdoor equipment. Moreover in the car and vehicle accessories segment there are even more positive projections. More than a half of respondents see an upward trend in the market for sustainable products.

We think these results could be taken seriously as results of a study (EUbarometer, 2008) showed that consumers clearly show that want to buy more sustainable products in the future. In this study 58 % said they want to buy more environmentally friendly products.

The most frequent sustainability feature that customers are interested in the outdoor equipment segment was recycling. It seems that other study results showed similar results. For example in the Greendex survey (2008) the British were among the top three countries when it comes to recycling actions undertaken. It seems that recycling is very present in the UK and that customers usually relate it to sustainability features.

Also over the 30 % of the EU citizens, among them the British were the most likely to select minimising waste and recycling as the actions having the greatest impact on solving environmental problems (EU barometer, 2008).

DEFRA's (2008) results showed that 71 % of respondents were engaged in recycling more and intended to continue to do the same in the UK.

Other sustainability features in our study were longevity, the way products are produced, where products are produced, packaging and similar results were found in other survey. A survey done by (PwC, 2008) showed that customers care more about what they buy, how it is made, what it is made from, how far it travels and how it is packaged.

Also in the car and vehicle accessories segment customers want to have more fuel efficient cars as our study results showed. Also some other studies showed that people are reluctant to change their behaviour in transportation sector and that people just love convenience of car use (DEFRA 2008&Greendex 2009).

However we found through our interviews that customers are largely affected by taxes on fuels and they want to pay lower taxes especially for companies' cars.

In our analysis we showed some statements that showed us a large influence of regulations on retailers/managers.

Our study results showed that the business sustainability plans were in direction of recycling and energy efficiency in the outdoor equipment segment. In the car segment plans are to increase offer of fuel efficient and hybrid cars.

It seems again as other studies showed that the business side plans are in a large proportion in direction of recycling (EUbarometer, 2008).

Also customers and manufacturer driven was something that was found in our study.

It seems that statistics were very similar to some other studies but we think beside these statistics we have more knowledge about sustainable consumer behaviour in the UK and especially in the selected segments through statements.

5.CONCLUSION

Going through different perspectives we saw that sustainable consumer behaviour in the UK is very important.

Investigating the existing EU's and the UK's regulation we found it is changing over the past years.

At the EU level there is a sustainable consumption and production programme that includes different areas of action. In the UK there is a national sustainable development plan and many other instruments explained that will encourage greater sustainable consumption.

After giving a background intro to the mentioned issues, we then started with investigation of sustainable consumer behaviour in the UK.

Firstly, the world tracking survey on sustainable consumer behaviour was analysed.

This was National Geographic survey Greendex.

After checking the UK's ranking in the worldwide survey, we then investigated sustainable consumer behaviour in the UK only.

The main findings of this survey were that environmental awareness increased and the British are more aware of the environmental issues. Also it was found that they are starting to buy more environmentally friendly products. When it comes to actions that are undertaken mostly British are undertaking recycling. Also this survey showed reluctance of changing transportation behaviour because the British like to travel by car.

But as these surveys were more in general not related to any specific segment of the industry, we did our own research in the outdoor equipment and car and vehicle accessories segment.

Results showed that in the both segments outdoor equipment and car and vehicle accessories sustainability is important for customers. Over two thirds in the both segments said sustainability is either fairly or very important for customers.

When analyzing customers' willingness to pay, again around two thirds in the both segments said that customers are willing to pay more for sustainable products. Also there are some respondents who did not quantify how much customers are willing to pay more.

The most frequent willingness to pay for environmentally friendly products in the outdoor equipment was up to 5% more, comparing to car and vehicle accessories of 5-10% more.

However maximum willingness to pay was larger in the outdoor equipment with 20 % more, while in the car and vehicle accessories this was up to 10 % more.

Probably this is due to larger prices in the car and vehicle accessories segment. We also need to mention that from this answer we found out that price is the main barrier while purchasing sustainable products.

Also we found this through the interviews with experts on sustainable consumer behaviour in the UK.

Our respondents in the both segments told us that market for environmentally friendly products developed well over the last few years. This answer was in less than a half of the sample. When analyzing projection on development of this market in the future, more positive projections were in the car and vehicle accessories segment. In this segment around 40 % respondents said they see it as an upward trend. This can tell us maybe that the outdoor equipment segment is better developed. But as this customer can be in the both segments we can expect better development for the car and vehicle accessories segment.

In the outdoor equipment segment recycling is the sustainability feature that customers are mostly interested in, comparing to fuel efficiency in the car and vehicle accessories segment. It seems there is a large percentage of customers that think recycling is important sustainability feature. Other two studies, DEFRA's and Greendex showed similar studies.

Also in the both segments many retailers related their plans with sustainability to government regulations and following the same.

When asking about plans regarding sustainability in the outdoor equipment segments recycling is again the most frequent answer. On the other hand in the car and vehicle accessories segment plans are to increase number of fuel efficient cars and hybrid cars and to follow what manufactures do.

We think this is an important piece of information for manufacturers that retailers will follow what they do.

Through interviews we found there is a shifting from niche products sustainable market to mainstream products market. This is important for the segments that we investigated, as we think it is more mainstream product market.

Based on our research we think there is going to be positive development of market for products having incorporated sustainability features.

Our research showed there is a large awareness about sustainability features in the selected segments. Also customers are willing to pay more for environmentally friendly products in the both segments. It is important to say that still price is a barrier for more sustainable products purchase. Supported with our study results currently products with sustainable features incorporated are overpriced. We think if prices would be up to 10 % more in the investigated segments, this would be a winning combination for more sustainable consumer behaviour in the UK.

Also it is important to mention that manufacturers of the products in the selected segments can produce more products that have sustainability features incorporated. We say this as our results showed there is a large awareness among customers on sustainability in the selected segments. Moreover also retailers have plans to increase their offers of products that have sustainability features incorporated and to follow what manufacturers will do.

Our projections about development of sustainable consumer behaviour in the UK are very positive. In the future probably also regulations will be stricter. Probably customers will demand more products that have sustainability features incorporated.

Doing nothing for the business side in the outdoor segment and car and vehicle accessories is no longer an option. We think consequences of doing business unethically or in an environmentally unfriendly manner in the investigated segments can be large in the long run.

All in all we think future will bring more sustainable consumer behaviour in the UK in general and in the outdoor equipment and vehicle accessories. Business side should seriously involve in this market in order not to lose the game and market share. With all market players' involvement, consumers, businesses and regulators we will witness more sustainable consumption that can lead us to more sustainable development in the future.

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