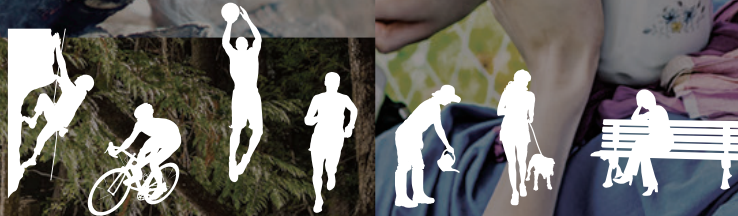
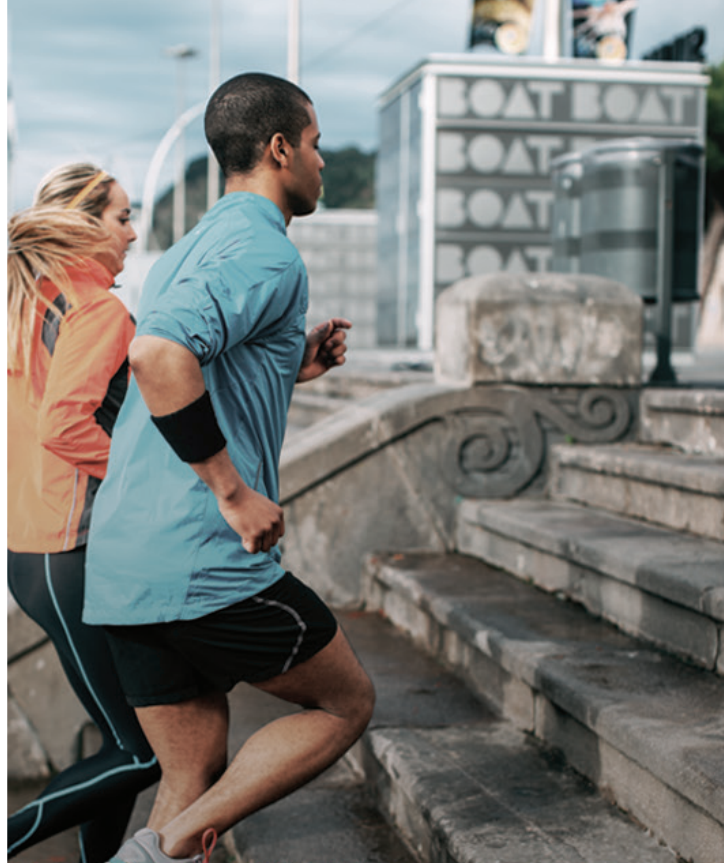




OIA  
| CONSUMERVUE™



## CONSUMER SEGMENTATION EXECUTIVE SUMMARY

OUTDOOR FROM THE CONSUMER POINT OF VIEW



OUTDOOR  
INDUSTRY  
ASSOCIATION



## INTRODUCTION

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*The ethos of the outdoor industry, built from within, has always thrived on the epic adventures, pushed limits and shared interests of an intimate community of passionate enthusiasts. While this spirit lives on for some in the next generation of outdoor participants, there are many who choose far more simple and diverse ways to love the outdoors and play in it. Their choices for outdoor activity, driven by factors such as where they live, how they grew up, and current lifestyle limitations, cast new meaning on the traditional industry definition of outdoor recreation.*

With this in mind, the ability to serve both the core and broader communities of outdoor participants is critical to the continued success and growth of the outdoor industry. To be relevant to the next generation of outdoor participants, we must better understand their desires, attitudes and behaviors. That need for understanding leads us to the central purpose of this research: to understand outdoor from the consumer point of view.

This report sheds light on those viewpoints with key findings from our outdoor consumer segmentation study. Among the segments explored here, we expect you will recognize a few, while others may be surprising. Even among familiar consumer segments, there are some interesting revelations. The world is changing quickly, and with it, outdoor consumers are changing how they shop, how they think about brands, and how they engage with the outdoors.

These findings are based on a wealth of data, only a fraction of which is presented here. Additional results, reports, and tools will be made available over the coming months through OIA ConsumerVue,™ an online interactive research tool to help industry members understand outdoor from the consumer point of view. Throughout this report and within OIA ConsumerVue, you will find special emphasis placed on specific, actionable business opportunities. We believe that highlighting these strategies, distilled directly from consumer insights, will benefit outdoor industry members today and well into the future.

## BACKGROUND

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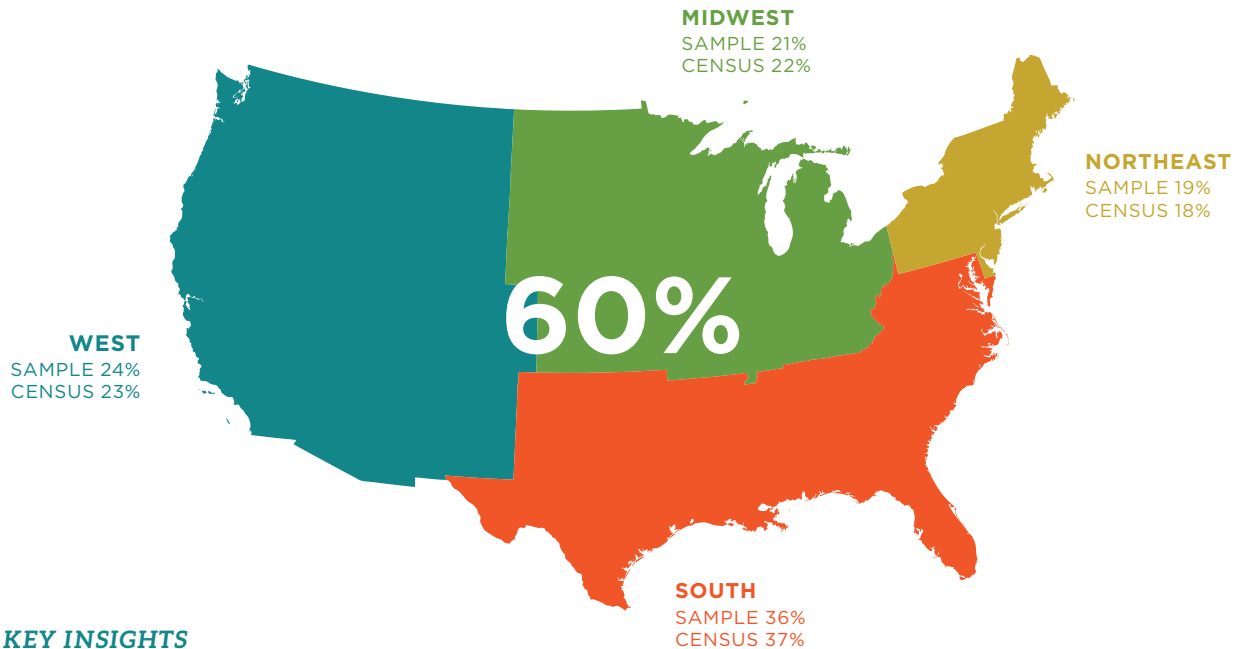
Outdoor Industry Association conducted an outdoor consumer segmentation study in 2014, through qualitative and quantitative research efforts, to meet the following objectives:

- Understand how the general U.S. population defines outdoor and how they engage in outdoor activities
- Quantify the outdoor consumer market in terms of size and spend
- Identify distinct segments of outdoor consumers in the marketplace

The resulting data identified macro-level insights on the U.S. outdoor consumer market, as well as revealed distinct attitudinal segments of outdoor consumers. While the segments may favor particular activities or share similarities in activity levels or demographics, the distinguishing variables used to identify the segments were based on the consumers' motivations and hindrances to getting outside, as well as their attitudes about the outdoors.



# THE OUTDOOR CONSUMER MARKET



## KEY INSIGHTS

Thirty-four percent of outdoor consumers live in cities, and those consumers tend to be young, ethnically diverse, active, and spend the most on outdoor gear

Seventeen percent of outdoor consumers are Hispanic – one of the fastest growing demographic groups in the country

## KEY INSIGHTS

Activities, products, and services that help aging consumers stay engaged in the outdoors and help parents get their kids outdoors within time and budget limitations will keep the current market of outdoor consumers healthy and fill the pipeline for the future

In the United States, there are 198 million adults between the ages of 18-65 and of those, 60 percent qualify themselves as outdoor consumers. Outdoor consumers are defined as people who:

- Spend at least one hour per week outdoors
- Participated in traditional or non-traditional outdoor activity at least once in the past year
- Purchase apparel, footwear, equipment, and/or technology for outdoor activities

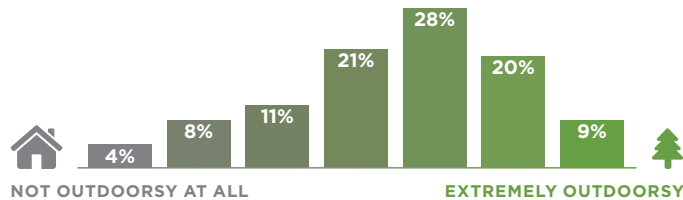
Demographically, outdoor consumers look much like the U.S. population and represent a broader market of people outside and being active than historically targeted by the outdoor industry. About half are female, almost half are 25-44 years old, over one third are minorities, and one third live in the South.

Outdoor consumers are looking for ways to stay active in their everyday lives. More than one third of them report that they used to be more active, but they still see themselves as being active into old age. More importantly, over 30 percent are interested in trying new outdoor activities and report that they are making a considerable effort to spend more time outdoors.

Forty-three percent of outdoor consumers have kids at home, and they believe they are raising the next generation of outdoor consumers. Most report that they believe it is natural for kids to spend time outdoors and that they encourage their kids to do so for their health and well-being.

Outdoor consumers do not classify themselves as especially outdoorsy (see Figure 1), despite the fact that most participate in traditional outdoor activities like swimming, running, road bicycling, and day hiking, which rank at the top of the list. That said, they have a very broad definition of what it means to engage in the outdoors. In fact, nearly all outdoor consumers participate in non-traditional outdoor activities, most common include relaxing outside, barbecuing/picnicking, walking for enjoyment, and walking for a purpose.

Figure 1: Self-Reported Levels of "Outdoorsiness"



### KEY INSIGHTS

Outreach efforts that address universal needs such as sunshine/fresh air and social engagement will resonate with nearly all outdoor consumers

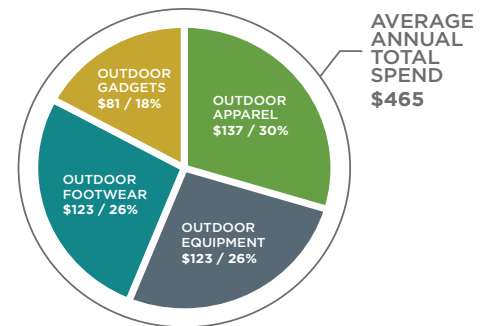
Outdoor consumers are motivated by a variety of different factors that range from active to leisurely. The top-rated motivations for getting outdoors were the positive benefits of sunshine and fresh air, to spend time with family, and to have fun. On the other hand, there are surprisingly few barriers. Only 11-12 percent of outdoor consumers endorse the top barriers, which include the amount of free time they have available and the cost of some outdoor activities.

Outdoor recreation is fundamentally social for today's consumers. Friends, significant others, and kids are the key influencers in getting people outside. These are also the people with whom they most often engage in outdoor activities. Only 20 percent of outdoor consumers participate by themselves.

Seventy percent of outdoor consumers use technology for something outdoor related, and many of those use it to make their outdoor experiences even more social. Those who use smartphones in the outdoors use them to stay in touch, and those who use Facebook or Twitter do so to share their outdoor experiences with others. YouTube is most often used to find inspiration or learn about a new outdoor activity, and Google is used to find new places to engage.

### Purchase attitudes among outdoor consumers

The average outdoor consumer spends \$465 annually on apparel, footwear, equipment, and electronics for their activities. While price ranks high in importance, function and versatility are key purchase influences. Many outdoor consumers have a "good is good enough" mentality towards outdoor products, citing that they don't need the best gear or equipment on the market. Durability, quality, and comfort are product attributes that many consumers are willing to pay more for.



### WILLING TO PAY MORE FOR

IS DURABLE	46%
IS THE HIGHEST QUALITY	42%
MAKES ME FEEL COMFORTABLE	42%

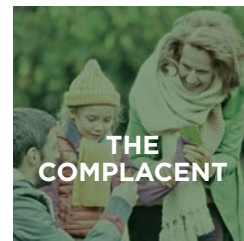
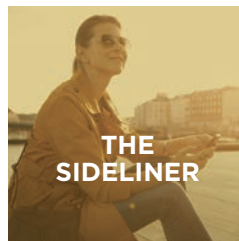
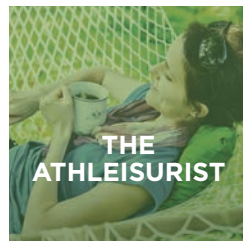
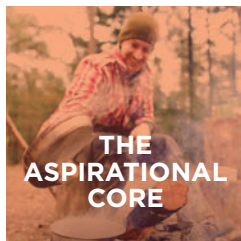
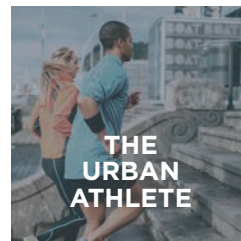
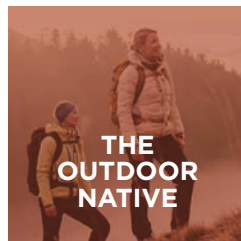
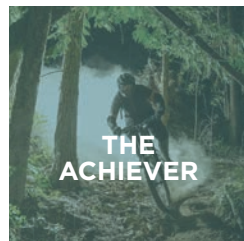
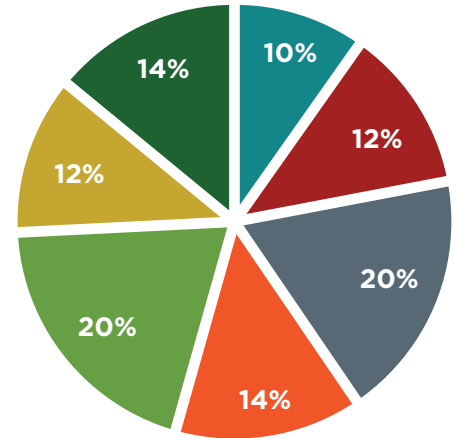
Outdoor consumers shop with a purpose. This is not to say that impulse purchasing doesn't happen, but 75 percent of consumers shopping for outdoor products are shopping with intent. The types of channels through which they shop most often include mass merchants, sporting goods chain stores, outdoor stores, and general online retailers.

When choosing a retailer, price tops the list, but selection, convenience and products for the entire family are on par. Technology plays an important role in the shopping process. More than 20 percent of consumers use technology to read product reviews or compare prices. Just under 20 percent use technology to discover new brands or find new places to shop. Google is the second most frequently visited website/search engine and is most often used to compare prices and read reviews.

## POPULATION OF OUTDOOR CONSUMERS

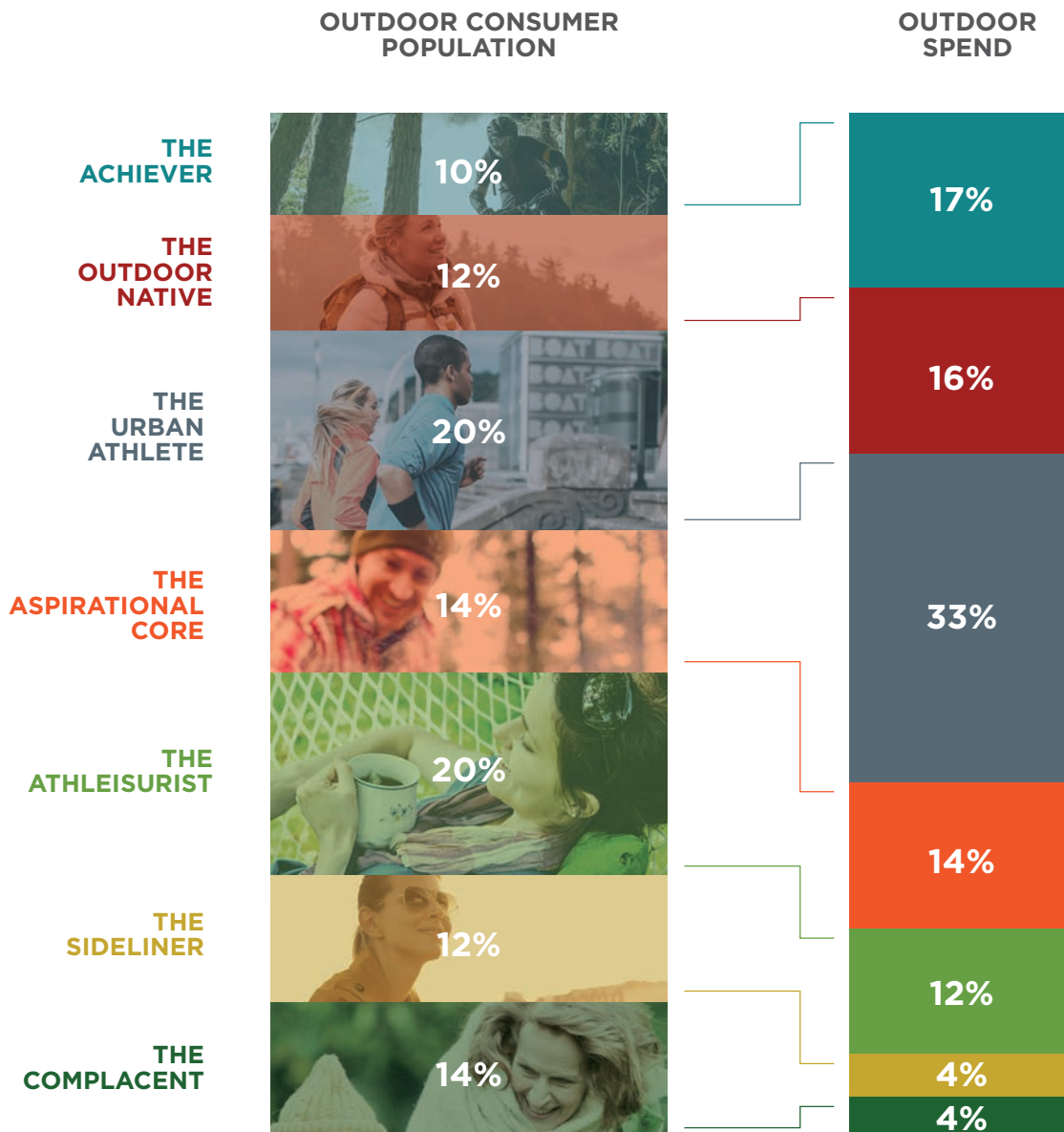


## SEGMENTS OF OUTDOOR CONSUMERS



The seven segments of outdoor consumers paint a vivid picture of just how diverse the market is. Representing a broad range of participation and purchase behaviors, each segment offers different opportunities for outdoor businesses.

The chart below shows the percentage of outdoor consumers in each segment compared to the percentage of outdoor spend represented by each segment. For example, 10 percent of the outdoor consumer population is The Achiever, and these consumers represent 17 percent of the outdoor spend. Assuming that each person represented an equal proportion of spend, we would expect The Achiever to account for 10 percent of spend, however they over-index by 7 percent, making them a valuable segment when measured by spend alone. Likewise, The Outdoor Native over-indexes on spend by 4 percent and The Urban Athlete by 13 percent.



Charts in this report may not always add up to 100 percent exactly. This is a result of rounding errors that do not persist in unrounded data.



## THE ACHIEVER

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The Achiever best represents the traditional outdoor consumer. They participate in a number of different activities including team sports, running, camping, climbing, and mountain biking, among others. Members of this segment are driven to participate in outdoor activities by a variety of motivations including performance and competition. Those that don't participate at a professional level aspire to do so, and nothing stands in the way of getting outdoors for members of this segment.



*"I do basically everything outside, such as playing sports, fishing, biking, running, and swimming."*

*"My jobs and interests require me to be outside. I love hiking, fishing, and camping."*

The Achiever wants the best products on the market with respect to style and function, regardless of brand or channel. They embrace technology in all aspects of their lives and use it to track their performance in outdoor pursuits.

The Achiever tends to be a younger male with children at home. They are more likely than members of other segments to live in or near a city and are more ethnically diverse.

### **KEY OPPORTUNITY**

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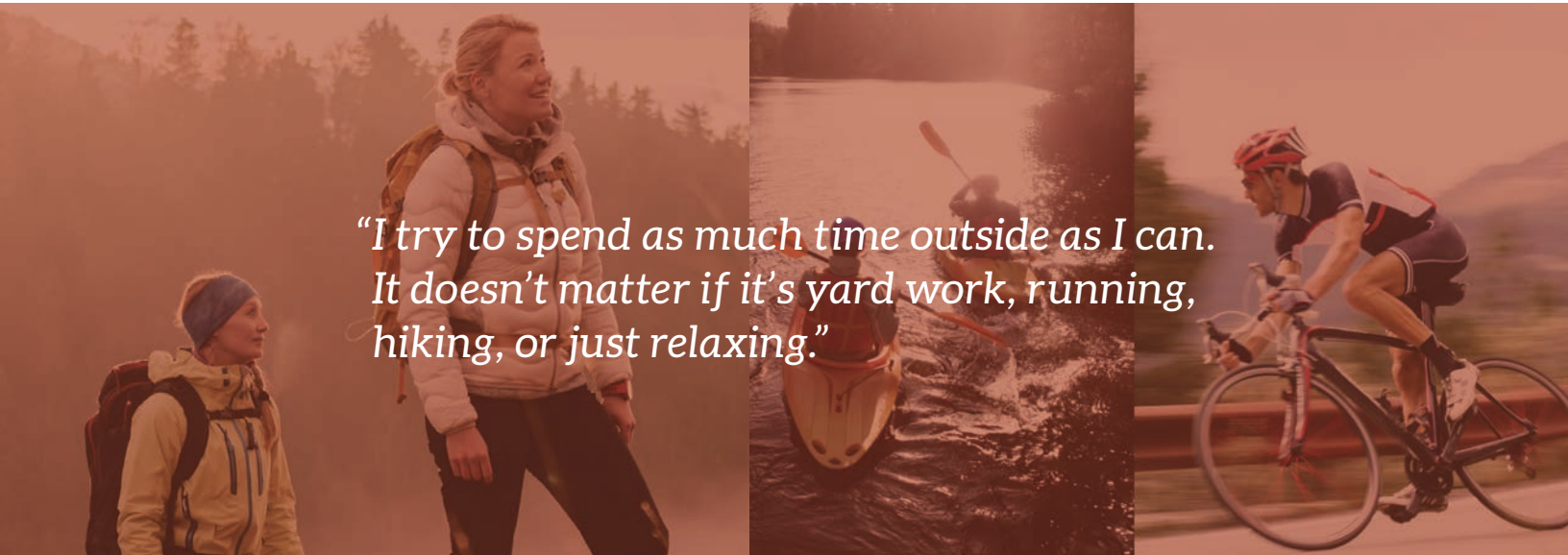
*By virtue of their participation and attitudes, members of The Achiever segment represent the quintessential outdoor consumer. Yet, they don't exhibit much brand loyalty and tend to value style in addition to function. As they are very social, they can be leveraged to inspire others in the outdoors.*



# THE OUTDOOR NATIVE

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Getting outside has always been an important lifestyle choice for The Outdoor Native and will continue to be in the future. They are motivated by enjoyment and the experience. Although they want to improve their own performance, they are less concerned about competition than their counterparts, The Achiever. They balance their personal passions in traditional outdoor activities with more leisurely family-oriented activities including playing outside, running, cycling, day hiking, and camping. They want to spend more time outside, particularly with their families. Not much stands in the way of getting outside for members of this segment, except occasionally the amount of free time available to them.



*"I try to spend as much time outside as I can. It doesn't matter if it's yard work, running, hiking, or just relaxing."*

*"I love being outside in the sun, in the rain, in the snow—all weather conditions."*

The Outdoor Native seeks sensible products that can cross activities, with a priority on versatility, functionality, and affordability. They mix traditional outdoor brands with more mainstream athletic brands. The Outdoor Native values technology but uses it more to discover and inspire their pursuits, preferring to disconnect while they are actually outdoors.

The Outdoor Native is more likely than members of other segments to be a middle-aged male.

## **KEY OPPORTUNITY**

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*The Outdoor Native is highly engaged, will continue to be engaged, and is grooming the next generation of outdoor consumers. The key opportunity lies in connecting these consumers with your brand/business and leveraging their influence on the next generation.*



# THE URBAN ATHLETE

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The Urban Athlete represents significant opportunity for the outdoor industry. The Urban Athlete gets outside not because they love the outdoors but because the activities they enjoy require them to go outside. Getting outside ranges from going to parks, the gym, and basketball courts all the way to mountains and lakes. They participate in activities such as basketball, skateboarding, outdoor yoga, mountain biking, races, and drills/HIIT/CrossFit. They were raised on team sports and, as a result, getting outside is much more about competition, socialization, and intensity than it is about connecting with nature. They feel crunched for time which is a significant barrier to increasing their engagement with outdoor activities.



*"I like being outside for workouts, but then want to come in and get clean."*

The Urban Athlete favors athletic products and brands and tends to be very style-conscious. Technology plays a central role in their lives, both inside and outside.

As the name suggests, members of this segment tend to live in urban areas, which poses a challenge to participating in their favorite outdoor activities as much as they would like. They are also younger, higher-income and are more likely than members of other segments to have kids in their homes.

## KEY OPPORTUNITY

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*The Urban Athlete is young, diverse, urban, and a big spender relative to outdoor products. They identify more with athletic brands than traditional outdoor brands and don't see themselves as outdoorsy. Leverage their competitive natures to build a relationship with these consumers.*



## THE ASPIRATIONAL CORE

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The Aspirational Core aspires to be outdoorsy and has a penchant for adventure. They tend to focus on one or two activities, including trail running, camping, mountain biking, and races. They stick close to home for most of their day-to-day activities but aspire to get further from home. Although they don't face physical limitations to engaging in the outdoors, distance between where they live and where they want to recreate is a barrier.



*"I just love being in the outdoors.  
It keeps me active and not idle."*

*"I run or hike  
on the local  
trail because  
it's convenient  
and close  
to home."*

Members of The Aspirational Core are open to renting as a way of figuring out which gear they want or whether they like the activity enough to invest. When they do buy, they look for gear that is specifically designed for their activity. Athletic and fashion brands appeal to members of this segment more so than traditional outdoor brands. However, when they do purchase outdoor products, they tend to choose products from well-known brands.

Members of The Aspirational Core tend to be younger and are more likely than members of other segments to be single.

### KEY OPPORTUNITY

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The Aspirational Core is much like The Urban Athlete but with an emphasis on aspiration rather than participation. Efforts that target The Urban Athlete will likely pull in The Aspirational Core as well.



## THE ATHLEISURIST

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The Athleisurist is comfortable with where they are now and find their “center” in the outdoors. They aren’t especially active in the outdoors, focusing on activities such as relaxing outside, walking for enjoyment, and gardening. Members of this segment are motivated by the enjoyment and escape they find outside. Unlike other segments, The Athleisurist does not aspire to be more outdoorsy but rather they are content with their current level of outdoor engagement.



*“I would rather be outside than inside. I love nature, animals, camping, gardening, and taking care of my yard.”*

*“I am a passive observer of the outdoors. I enjoy walks in places of natural beauty but don’t usually go on hikes, rock climb, or anything like that.”*

The Athleisurist seeks sensible basics in their outdoor products and looks for long-standing mainstream outdoor brands. Compared with other segments, The Athleisurist is not very engaged with technology generally and considers the outdoors a way to disconnect even further.

The Athleisurist tends to be older and more likely than members of other segments to live in rural areas. They skew female and are less ethnically diverse than other segments.

### **KEY OPPORTUNITY**

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*The Athleisurist already has an affinity for traditional outdoor brands. To reach them, the focus has to be on the experience and not on the performance. Given their price sensitivity, they are good candidates for entry-level products or packaged goods.*



## THE SIDELINER

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The Sideliner likes getting outside for the sunshine and fresh air but rarely participates in activities more intense than walking. Key activities among this segment include relaxing outside, barbecuing, and going to the park. The Sideliner used to be more active outdoors but is hindered by physical limitations such as injuries or weight issues.



*"I like to be outdoors, working in my garden or being out in the forests, but injuries have severely limited my abilities to function out there doing what I like to do."*

*"I love a few hours of soaking up the vitamin D at the pool on the weekends. I also love to play in my flower garden and spend time reading in the garden."*

The Sideliner tends to stick with comfortable and affordable products and feels excluded by outdoor brands. They look for brands and stores that offer the lowest prices, favoring mass merchandisers. Technology plays a relatively limited role in the outdoors among members of this segment, who use it primarily to get information on products.

The Sideliner tends to be older with kids already out of the house. They skew lower income and are more likely than members of other segments to live in small towns and rural areas.

### **KEY OPPORTUNITY**

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*Products that enable members of this segment to overcome their physical limitations and spend time relaxing outside will resonate.*



## THE COMPLACENT

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The Complacent prefers the creature comforts of the indoors, and members of this segment are limited in their ability to get outdoors by health and fitness. They didn't grow up involved in outdoor activities, and their perception of what it means to engage with the outdoors is extreme, something they definitely don't aspire to. When they do go outside, members of this segment prefer to stick to low-intensity activities such as relaxing outside, walking for a purpose, and attending community activities.



*"I like fresh air, but I don't particularly like the outdoors. I hate bugs more than pretty much anything in the world. I also appreciate the comforts [of the indoors], such as air conditioning, TV, a bed, etc."*

The Complacent needs only the most basic products and strongly favors low-price retailers, such as mass merchandisers. Technology plays a very limited role with this segment, both indoors and outdoors.

Members of this segment skew older and tend to live in suburbs and small towns.

### **KEY OPPORTUNITY**

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*For most brands and retailers, the return on investment in targeting The Complacent will be relatively low. For those that have the resources, there is opportunity to connect with new consumers that feel disenfranchised by the outdoor industry.*

*"Since I retired, I stay pretty close to home and go out for business or out in the yard for fresh air. This is enough outdoors for me."*

## WAYS TO USE A CONSUMER SEGMENTATION

The real value in any research lies in the action it inspires. A consumer segmentation is a valuable tool, as it allows companies to more effectively target existing customers as well as understand which consumers are most likely to generate the highest return on investment for their business. Consumer segmentations can be used to:

- Better understand your existing customers  
*What segment do my customers fall in and how can I better meet their needs?*
- Identify strategic targets for your business  
*Which segment is most likely to generate the highest ROI for me?*
- Identify new opportunistic targets for your business  
*What segment might I want to proactively target in order to differentiate?*
- Understand which consumers are the best target for new products/services  
*What segment should I target for my new business idea or opportunity?*

Each segment represents its own unique set of opportunities that can be aligned with whatever business objective you are trying to achieve. Strategies can include everything from growing business within your existing customer base to targeting new customers or new markets.

## BUSINESS GROWTH STRATEGIES

### GROW PENETRATION

EXISTING CUSTOMERS,  
EXISTING PRODUCT LINES

**Increase sales with existing customers through promotions, different pricing, or a new positioning of existing products. This is typically a lower-risk strategy involving a smaller investment.**

*Example: Lululemon has developed a number of marketing strategies to encourage their consumers to be even more active, from hosting free classes to developing an app to find yoga classes wherever they might be – the idea being that increasing participation will translate into an increase in sales.*

### GROW OFFERINGS

EXISTING CUSTOMERS,  
NEW PRODUCT LINES

**Grow sales through the introduction of new products intended to meet new or unmet needs of the existing target.**

*Example: The G-Series line from Gatorade is intended for Gatorade's existing target – athletes – but expands the occasions for which they use Gatorade, targeting the “pre” and “post” of their workout, from energy through recovery.*

### GROW SHARE

NEW CUSTOMERS,  
EXISTING PRODUCT LINES

**If existing products prove to be successful, consider ways to reach new consumers, like expanding to a new geographic location or repositioning the products to a new audience.**

*Example: Sorel has long been known for boots that can withstand harsh weather conditions, but the same boots are also getting recognition in the fashion world. With the same product, Sorel has expanded its audience, reaching new consumers through fashion channels and existing consumers through outdoor retailers.*

### DIVERSIFY

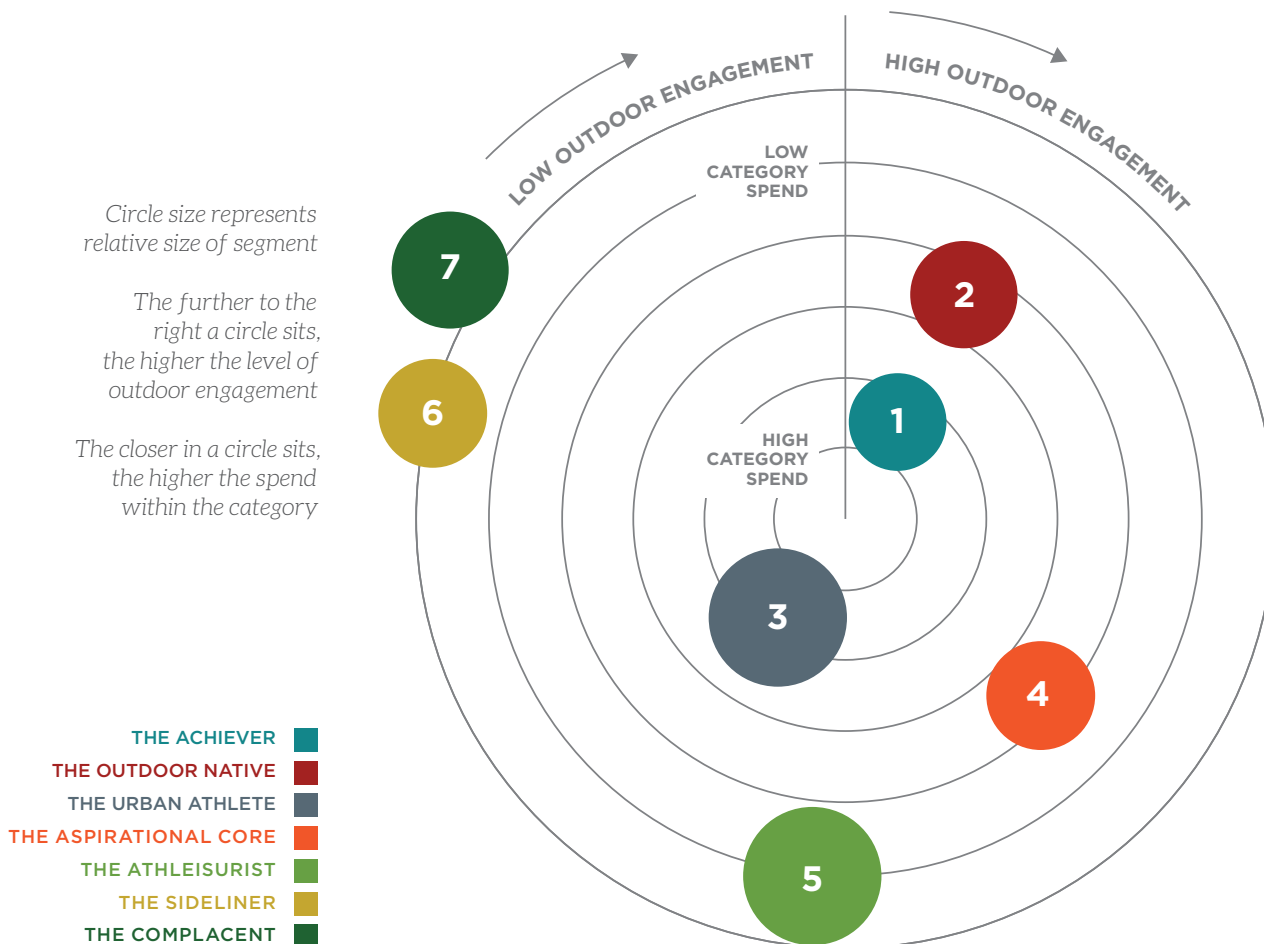
NEW CUSTOMERS,  
NEW PRODUCT LINES

**Develop an entirely new product or line of products targeted at a different consumer. This strategy is typically higher risk and requires a larger investment.**

*Example: Initially, Patagonia was a climbing company and, not surprisingly, was targeting climbers. Since then, Patagonia has not only expanded to other verticals, but also notably expanded their lifestyle offerings targeting an audience much broader than their initial cult following.*

In order to determine which strategy is right for you, it's important to understand who you already reach and who you could most effectively reach to provide efficiencies within your business and new opportunities for growth. If you have a strong understanding of who your current customers are from an attitudinal perspective, you may be able to anecdotally identify which segment or segments your current customers fall into. There are also tools, which OIA will be making available, to help businesses collect data about existing customers in order to identify which segment they fall into.

## THE SEVEN SEGMENTS A MACRO VIEW



To identify your highest potential customers, those who will provide the strongest return on your investment, you must determine which segment's needs you are meeting the most with your current offering. By understanding the unique needs, desire, and attitudes of each segment, you can get a vision of which consumers your brand/business best aligns with and can build your operational, marketing and product strategies to strategically target that market.

With this level of strategic insight about your current customers and opportunistic target consumers, you can make informed decisions around which growth strategy presents your best opportunity. But how does this apply to your business? Although the implementation process is generalizable, the analysis, prioritization, implementation, and measurement steps for applying segmentation insights to business strategy will vary from company to company. OIA will be working in the upcoming months not only to put the valuable insights about outdoor consumers into the hands of members, but also to provide tools and guidance on how to apply this knowledge from a business perspective.

#### **BEST PRACTICES FOR IMPLEMENTING SEGMENTATION FINDINGS INCLUDE THE FOLLOWING STEPS:**

- *Identify segments you already reach*
- *Identify segments you don't reach but would like to reach (or don't reach as well as you would like)*
- *Develop targeted strategies to maximize/maintain performance in the segments you already own and to grow in segments that offer the most opportunity*
- *Allocate resources based on segment prioritization*
- *Measure the success of your targeting strategies*

OIA ConsumerVue, a new interactive research tool on the OIA website, includes data on the outdoor consumer market and the seven consumer segments through reports, infographics, videos, activation guides, and more. Visit OIA's website or contact [research@outdoorindustry.org](mailto:research@outdoorindustry.org) for more information.

## **METHODOLOGY**

In the summer of 2014, both qualitative and quantitative research was conducted by Egg Strategy on behalf of OIA. One-on-one interviews, as well as outdoor participation videos from outdoor consumers, were analyzed and used to inform the development of the quantitative survey. A total of 2,562 online surveys were completed by a national sample of outdoor consumers ages 18 to 65. Quotas were set for particular ethnic groups to ensure representation similar to the distribution of those groups in the U.S. population (i.e., Blacks/African Americans, Hispanics, Asians). To qualify, respondents were required to meet the following criteria:

- *Spend at least one hour outside per week*
- *Participated in a variety of outdoor activities at least once in the past 12 months (24 traditional outdoor activities<sup>1</sup>; 24 non-traditional activities<sup>2</sup>)*
- *Purchased apparel, footwear, or equipment for use in outdoor activities*

Although all surveys are subject to sampling error, the sample of 2,562 provides a high degree of statistical accuracy (plus or minus 1.9 percent at a 95 percent level of confidence). For example, if we estimate that 62 percent of outdoor consumers participated in swimming at least once in the past 12 months, actual participation could be as low 60.1 percent or as high as 63.9 percent. Note that accuracy varies by segment depending on the sample size within each segment.

A weighting technique was used to balance the data to represent the eligible U.S. population ages 18 to 65. The weighting process was designed to ensure that the final sample of completed respondents accurately reflects the population of qualified customers on key demographic characteristics.



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## ABOUT OUTDOOR INDUSTRY ASSOCIATION

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Based in Boulder, Colo., with offices in Washington, D.C., Outdoor Industry Association (OIA) is the leading trade association for the active outdoor lifestyle industry and the title sponsor of Outdoor Retailer. OIA supports the growth and success of more than 4,000 manufacturers, distributors, suppliers, sales representatives, and retailers of outdoor recreation apparel, footwear, equipment and services. For more information, go to [outdoorindustry.org](http://outdoorindustry.org) or call 303.444.3353.

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<sup>1</sup>Traditional activities included: Trail running, Running / jogging (outdoors), Mountain biking, Bicycling (on a road / paved surface), Rafting, Bird watching / Wildlife viewing, Fishing / fly fishing, Skiing (alpine / downhill), Skiing (cross-country), Snowboarding, Rock climbing (outdoor), Boating / sailing, Kayaking, Canoeing, Stand-up paddle-boarding / Windsurfing, Surfing, Day hiking (not overnight), Car camping, Camping (e.g., walk-in, hike-in), Backpacking (overnight), Hunting, Water skiing / wakeboarding, Swimming (in a pool, lake, ocean, etc.), Participating in a running race (e.g., 5K, 10K, marathon, triathlon)

<sup>2</sup>Non-traditional activities included: Walking for enjoyment (e.g., around a city, neighborhood), Walking for a specific purpose (e.g., walk the dog, run errands), Commuting to work/school by bicycle, Playing outside, Relaxing outside, Going to the beach, Going to a park or playground, Golfing, Doing drills, boot camps, etc. outside, Outdoor yoga (e.g., on the beach, in a park), Horseback riding, Geocaching, Playing team sports outside (e.g., basketball, soccer, volleyball, frisbee), Barbecuing or picnicking, Gardening / doing yard work, Attending outdoor concerts or festivals, Attending community activities (e.g., farmer's markets, fairs, parades), Tailgating or spectating an outdoor sporting event, Participating in an obstacle race (e.g., Tough Mudder), Parkour, Paintballing, Sightseeing, Scenic-driving / road-tripping, Skateboarding

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- All citations must be listed verbatim and attributed to Outdoor Industry Association.
- All citations must be limited in scope. Full reproduction of OIA research is prohibited.
- All citations must come directly from OIA research reports and tools.
- Graphs or data can be briefly summarized when no corresponding text is available.
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