OIA | CONSUMERVUE

PATH TO PURCHASE REPORT

OUTDOOR INDUSTRY ASSOCIATION

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UNDERSTAND U.S. OUTDOOR CONSUMER SEGMENTS

Segment	PERCENT OF THE U.S. OUTDOOR CONSUMER POPULATION	SPEND PER YEAR ON OUTDOOR EQUIPMENT	HOURS SPENT OUTSIDE PER WEEK
THE ACHIEVER *Everything Outdoors | Performance-driven | Engagement at its fullest*	10%	$799	27
THE OUTDOOR NATIVE *Highly Involved | Experience-driven | Established*	12%	$637	22
THE URBAN ATHLETE *Athletic | Competitive | Stressed*	20%	$781	24
THE ASPIRATIONAL CORE *Adventure Seeking | Aspirational | Moderate engagement*	14%	$476	20
THE ATHLEISURIST *Low-Intensity | Enjoyment | Emotionally Driven*	20%	$284	19
THE SIDELINER *Lessened Involvement | Inhibited | Interested*	12%	$162	13
THE COMPLACENT *Excluded | Unmotivated | Unfit*	14%	$143	11

EXPLORE THE OUTDOOR CONSUMER PATH TO PURCHASE

This report examines the purchase process among the key segments of the U.S. outdoor consumer population, as identified in OIA's ConsumerVue segmentation research. It reviews top trends in retail and consumer purchasing behavior, highlights areas where there are meaningful differences and makes recommendations for brands and retailers.

Understanding the New Path to Purchase is Key:

The growth of digital technology has empowered consumers and transformed their purchasing journey. Consumers are no longer funneled through a linear path to purchase, but instead meander at their leisure through a "maze to purchase" full of exploration that crosses channels, devices, retailers and social networks.

Savvy consumers resist push messaging from retailers and brands, but rather pull information from a variety of sources to get into modes like browsing, learning, shopping, playing, exploring, socializing and others. Brands and retailers must embrace a holistic view of the new consumer journey to evolve strategies that satisfy the high expectations of consumers. Brands and retailers that thrive in this new paradigm full of options will do so by creating personalized and contextually relevant experiences that satisfy buyers high expectations.

89%

of companies expect to compete mostly on the basis of customer experience in 2017

Gartner

13%

of companies feel strongly that they have identified their customers' decision journeys and understand where to focus marketing

McKinsey

50%

of companies don't feel confident about measuring the critical stages of the consumer decision journey

McKinsey

The two major shifts brands and retailers must understand in the customer-driven "maze to purchase":

1. Digital technology has disrupted and splintered the traditional, linear sales funnel

2. Digital technology has created a deluge of consumer data which can be harnessed to go beyond simple demographic targeting strategies

These shifts require brands and retailers to think beyond the traditional sales funnel and demographic targeting and use the new digital marketing tools. Many legacy and up-and-coming outdoor brands are beginning to understand the role digital has to play now, and in the future. For brands like Under Armour that have made significant investments in data capturing and the rise of digital. Data helps to power Under Armour's data-tracking apps, but also influence product lines and increase personalization.

For more traditional brands such as Orvis, whose demographic skews older, the Internet of Things and newer IT solutions are also top of mind. Orvis' CIO Dave Finnegan envisions a future where sensors are attached to rods, reels, apparel and other outdoor gear to offer more personalized recommendations.

At the center of this technological revolution is a focus on the customer and his or her journey to purchase and beyond.

70%

of consumers agree technology has made it easier than ever to take their business elsewhere

Salesforce

61%

of consumers agree that technology is redefining their behavior as consumers

Salesforce

85%

of in-store sales in 2017 are projected to be influenced by digital

Deloitte

70%

of online shopping carts are abandoned

Baynard

58.6%

who abandoned a session/carts claim "I was just browsing/ not ready to buy"

Baynard

The challenge for brands and retailers is to understand the consumers intent and mode in a particular moment. Why are they using the shopping cart (**queue**) if they're in a browsing mode? Why are they not ready to buy? How do brands and retailers encourage them to enter a purchasing **mode**? Do they think the queued item can be purchased somewhere else for less? Was the checkout process too difficult?

Physical Context is also important. Where are consumers shopping and through what device? Where is the consumer physically? Are they in the store? At home? Alone or with others? What else is going on during the process?

TERMS TO KNOW

QUEUE:

An interface between the consumer and tools that allows the consumer to think quickly and act fast, or to meander, put things on hold, sort and consume content, and be alerted in a timely fashion.

Queues are important because they help reduce the distance between thinking and doing. As product options and channels increase, potential buyers can fall into a type of analysis paralysis of the many options they must sift through to come to an informed purchase decision. Personalization helps to create better queues and increase the chance of consumer purchase and loyalty.

MODE:

A consumer's unique mindset and way of doing things, or of performing a task that leads to patterns of behavior that drive receptivity and determine what is valued. By targeting a mode, retailers and brands are effectively aligning goods, services, or experiences with the way that consumers go about doing what they want to do.

THE OUTDOOR CONSUMER IN A DIGITAL WORLD

Outdoor consumers, like the general consumer, are increasingly multi-screen users, with an average of 2.6 devices used regularly. They are also as likely to use their smartphone as much as their laptop computers.

70%

of outdoor consumers engage with tech for something outdoor related, whether it be to gather product information, interact socially or discover something new.

Eighty percent shop outdoor retailer sites every two months or more often. Statistics like these demonstrate that brands and retailers that don't embrace digital mindsets and modes will lag behind more innovative brands.

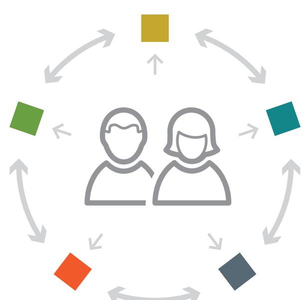
In the pre-digital age, the path to purchase was simple and linear. The data gathering capabilities of companies was limited and targeting demographics was the blunt tool of the trade. Brands and retailers **"pushed"** messages to consumers during these different stages.

Studies by McKinsey and Google reveal that this traditional path to purchase doesn't fully capture the true behavior of today's consumers, who don't simply move linearly from one stage to the next, reducing the number of brands they're considering. Instead, they **"pull"** information from a variety of sources (reviews, blogs, online videos, social media), and quickly shift devices, modes, channels and retailers to find the right product for them.

THE TRADITIONAL PATH:

AWARENESS
↓
FAMILIARITY
↓
CONSIDERATION
↓
PURCHASE
↓
LOYALTY

THE NEW CONSUMER JOURNEY:



INITIAL CONSIDERATION SET

The consumer considers an initial set of brands, based on perceptions, preference, and direct and indirect marketing influences, and explores these options through research in-store, online, through social media and on a variety of devices.

ACTIVE EVALUATION

Consumers add or subtract brands according to their preferences (price, performance, style, technical quality, reviews and recommendations). This is similar to Google's Zero Moment of Truth: the moment where research is conducted online about a product before taking any action. This is where most consumers meander, and depending on the type of consumer and their shopping style, where brands are most likely to enter or leave the consideration set. However, after this digital browsing, many consumers enter a brick and mortar store without making a decision on which brand to buy.

MOMENT OF PURCHASE

The exact moment of purchase and how a consumer feels about a brand or retailer before use of that product.

POST-PURCHASE EXPERIENCE

How consumers experience a product and how a brand or retailer engages with them after purchase.

LOYALTY LOOP

After use, a consumer may become loyal to a brand or retailer in one of two ways: actively or passively. Active loyalty comes with automatic selection of the brand based upon past experiences. Passive loyalty is when a consumer, after purchasing a particular brand, keeps that brand in the consideration set, but is open to other possibilities.

EMBRACE THE NEW CONSUMER JOURNEY

The sales funnel is no longer a funnel. With thousands of different paths to purchase, it's impossible to have a tidy purchase path model. It's more important to understand consumers and meet them on their terms and their time by using three key strategies.

one.

Empower customers

Give consumers the right tools and right advice so that they can find the right product (at the right time and at the right price).

two.

Personalize the experience

Provide 360° customer engagement and personalization. Truly understanding the needs and wants of consumers all along the journey is key to creating a great experience, building affinity and loyalty, and increasing revenue.

three.

Get to yes

Reduce friction across channels and create a seamless experience to reduce the distance between consideration and purchase. Consumers are almost always willing to offer up identification information, as well as their preferences, if they think what they get in return will help them get what they want quicker and at a better price.

one

EMPOWERING OUTDOOR CONSUMERS

Did you know

U.S. consumers consult on average 12 sources of information, and spend 12-15 hours researching before making a purchase?

ThinkWithGoogle

Smart brands and retailers will meet consumers where they are, creating an ecosystem that supports a consumer throughout the purchase journey. Failing to create a seamless experience and not anticipating consumer needs, will result in brands and retailers being disrupted by competitors who are winning customers by personalizing services and catering to them.

Each outdoor consumer and their journey is unique, therefore accounting for each and every journey is impossible, so don't. Instead, focus on the fact that outdoor consumers largely fall into one of seven segments, as determined by OIA's ConsumerVue segmentation research: The Achiever, The Outdoor Native, The Urban Athlete, The Aspirational Core, The Athleisurist, The Sideliner and The Complacent. Each segment has a distinct set of values, behaviors and evaluates brands and retailers differently. For example, The Achiever skews more competitive and extreme in outdoor pursuits and is actively evaluating different brands and retailers that enhance performance, whereas The Athleisurist views being outdoors as a relaxing escape and is content with brands and retailers that offer practical basics. These seven segments map to three purchasing styles: **Journey-driven, Destination-driven** and **Good Enough**

JOURNEY-DRIVEN CONSUMERS

Likely Mode: *Researching*
Likely ConsumerVue Segments: *The Achiever, The Outdoor Native*

Key Attitudes and Behaviors:

- Enjoy the hunt for new products and meandering in the evaluation stage.
- Love getting to know their options, qualities and comparing products.
- More likely to shop around and get recommendations to keep them up-to-date on the latest trends and technologies.
- More likely to be early adopters and the most likely to post reviews and testimonials of their experiences.
- Influencers to the destination-driven shopper.
- Most likely researching gear and reading news on sites like GearJunkie.com.

Journey-Driven purchasers thrive on being in the know, feeling savvy and informed, and hate making uninformed choices.

DESTINATION-DRIVEN CONSUMERS

Likely Mode: *Purchasing*
Likely ConsumerVue Segments: *The Aspirational Core, The Urban Athlete*

Key Attitudes and Behaviors:

- Don't really care for learning about a product's attributes, except for how it looks and will make them look and perform, and make rapid decisions based upon their priorities (most stylish and activity specific).
- Enjoy testing products, so offering rentals or trial periods with a generous return policy would help sell in this shopping style.
- More likely to be influenced by, peers, magazines, social media reviews or other independent sources of information. Offering a user experience and platform for sharing their opinions is key to reaching this consumer and this shopping style.
- Likely to skim mobile version of brand sites like Aether Apparel or online outdoor magazines.

Destination-driven purchasers want the work done for them, so reducing the distance and friction between thinking and doing is key to winning this consumer.

GOOD ENOUGH CONSUMERS

Likely Mode: *Bargain Hunting*
Likely ConsumerVue Segments: *The Athleisurist, The Sideliner, The Complacent*

Key Attitudes and Behaviors:

- Don't take risks when it comes to purchasing apparel and equipment.
- Don't have high activation like the journey-driven type, but appreciate tools that make it easy for them to find the best deals for sensible and affordable basics.
- Lowest price web crawlers and coupon-finding sites like Camelcamelcamel.com and JoinHoney.com help this type of shopper find the best deals.

Good enough consumers take pride in finding the best deals.

OUTDOOR CONSUMER PURCHASE DRIVERS

As outdoor consumers move through their unique path to purchase, in their own particular shopping styles, they weigh and consider many different attributes. These are not just product attributes, but brand and retailer preferences. Knowing a consumer segment's preferences is the basic expectation; to truly win in the digital age, brands must become much more targeted and specific, thus more relevant, when messaging to the different outdoor consumer segments.

What outdoor consumers look for in an outdoor retailer:

63% Provides specials or sales

57% Provides lowest prices

57% Carries products for the entire family

56% Offers a wide selection of apparel, footwear and equipment

54% Is conveniently located

54% Provides extremely functional apparel, footwear or equipment

54% Offers a wide selection of brands

52% Offers free shipping or returns on their website

48% Has an environment that is comfortable and welcoming

47% Allows you to compare prices

Where outdoor consumers shopped for outdoor apparel, footwear or equipment in the past 6 months:

42% MASS MERCHANDISER STORE

30% SPORTING GOODS CHAIN STORE

25% GENERAL ONLINE RETAILER

15% DISCOUNT RETAILER

14% DEPARTMENT STORE

Both rational and emotional factors contribute to the outdoor consumers' purchasing preferences. Durability, quality, and comfort are the functional product attributes most likely to garner a purchase. However, emotional attributes such as brand trust and safety are important as well.

Functional Drivers

46% DURABILITY

42% QUALITY

42% COMFORTABLE

36% VERSATILE

34% FUNCTIONALLY THE BEST ON THE MARKET

Emotional Drivers

38% BRAND I TRUST

34% MAKES ME FEEL SAFE

27% GIVES ME CONFIDENCE

25% REVIEWED HIGHLY BY OTHERS

25% BRAND THAT HAS BEEN AROUND A LONG TIME

CONSUMERVUE SEGMENTS' SHOPPING CRITERIA FOR RETAILERS

Forty percent of outdoor consumers shop with a mission and another 35% shop with intent, but are open to ideas.

The Achiever | *On a mission to get what they need*

- Stylish yet technical and performance enhancing offerings
- Has an inspiring shopping environment
- Rewards their loyalty
- Carries products for the entire family

The Outdoor Native | *Shopping with intent, but open to ideas*

- Wide selection of new and established brands and products is important
- Functional, versatile and technical offerings
- Seek an approachable and knowledgeable shopping environment
- Looking to be inspired

The Urban Athlete | *Buying on impulse, seeking information*

- Seek stylish over functional offerings
- Uniqueness over broad selection
- Less price sensitive
- Need beginner information and rentals
- Like retailers with shopping apps and loyalty programs

The Aspirational Core | *On a mission to get what they need*

- Wants to be inspired
- Believe they need the best
- Enjoy renting
- Like retailers with shopping apps
- Less swayed by deals
- Care less about selection

The Athleisurist | *On a mission to get what they need*

- Price, function and selection
- Comfortable and sensible offerings
- Not looking to be inspired or try something new
- Nothing highly technical

The Sideliner | *On a mission to get what they need*

- Price, versatility and function
- Outdoor brands don't speak to them
- Durability and comfort are key
- Not influenced by others

The Complacent | *On a mission to get what they need*

- Little to no interest in outdoor gear
- Not influenced by brand names
- Everyday basics are good enough
- Price and convenience are key purchasing drivers

OWNING INFORMATION GATHERING

Seventy-five percent of outdoor consumers shop with intent and educate themselves prior to making a purchase.

To gather inspiration for new outdoor gear, 9% of U.S. outdoor consumers go to Google and online retailers. To discover new places to shop or new outdoor brands, they are most likely to go to Google (13% and 11% respectively), followed by online retailers (7% and 9% respectively). Outdoor consumers also go to Google and online retailers to compare prices and read reviews of outdoor products.

In comparison, the general U.S. consumer considers user-generated content on social media, blogs and websites more influential than retailer-sponsored content, such as ads, user guides, and retailer blogs. Brands that create platforms for user-created content are likely to succeed in the digital age.

BRAND SPOTLIGHT

Detailed reviews

Under Armour's online retailer site not only offers reviews, but also gives more information about body type, level of engagement and types of activities the reviewer accomplished with the product being reviewed. Offering this more detailed view of reviewers helps potential customers determine if a reviewer's opinion matches their own preferences.

User generated content

GymShark, a boutique workout apparel shop's Instagram-first marketing efforts encourage followers to participate in the social media conversation for a chance to be featured on the company's Instagram account. This strategy features user-generated content and offers an authentic look at the believers in the brand.

REVIEW BEFORE BUYING

Seventy-one percent of general U.S. consumers are likely to purchase products that have positive online consumer ratings.[1] The Achiever and The Outdoor Native are more willing to pay for highly reviewed items, whereas The Urban Athlete and The Aspirational Core are more trusting of opinions from friends and family.

Key demographic differences in information gathering

Younger consumers and higher income consumers are more likely to seek out expert opinions and prefer user review sites.

Older consumers and lower income consumers are less likely to seek out opinions and prefer independent sites.

Segment highlights

Members of The Outdoor Native segment are more likely to use Google and outdoor retailers to discover new places to shop, new outdoor brands, compare prices and read reviews.

The Achiever and The Urban Athlete are more likely than the other segments to use independent review sites (such as GearLab), and user reviews to help determine which products are added to their consideration set.

The Athleisurist, The Aspirational Core, The Outdoor Native are more likely than the other segments to use social media, friends and family to help determine which products are added to their consideration set.

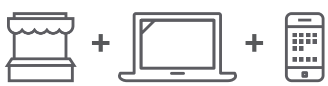
[1] *Salesforce*

two

PERSONALIZE THE EXPERIENCE

Understanding and responding to customer preferences are standard marketing strategies, but the key for outdoor brands and retailers is to move beyond simple data capture to learn and respond to customers in real time, in their modes, as they move through the path to purchase. This need for personalization is driven by consumers' digital retail experience. Think of Amazon.com and how it offers personalized recommendations and "items that are frequently purchased together" queues in real-time.

Consumers seem like contradictions when it comes to personalization. On one hand, they want choice and the power to search endless aisles for the right products. On the other hand, they want curation and a select number of products that are right for them. They want brands and retailers to know them, so a consumer must offer up some personal information, but how that information is used can either delight customers and encourage them to buy more or result in them taking their business somewhere else.



INTEGRATE PERSONALIZATION IN-STORE AND ONLINE EXPERIENCES

75%

of U.S. consumers either agree or strongly agree that they expect companies to provide a consistent experience wherever they engage with them (website, social media, mobile and in person).[2]

Of those who shopped for outdoor gear within the past six months, 39% of outdoor consumers shopped both online and at brick-and-mortar locations. Only 12% of outdoor consumers shopped exclusively online.

Did you know

66%

of consumers say they're extremely or somewhat likely to switch brands if they feel like they're treated like a number rather than an individual.

Salesforce

72%

of consumers agree that they expect companies to understand their needs and expectations.

Salesforce

61%

of customers are more likely to buy from companies that deliver custom content.

McKinsey

55%

of consumers will share a non-required piece of data for personal recommendations or a tool to help them with complex decisions.

Columbia Research

[2] *Salesforce*

57%

of consumers say it's absolutely critical or very important for companies they purchase from to be innovative.

Salesforce

TERMS TO KNOW

SHOWROOMING:

Visiting a store to examine a product before buying it online for a lower price

WEBROOMING :

Visiting a website to research a product, then visiting a store to buy that item

27% OF OUTDOOR CONSUMERS WEBROOM VS **66% OF GENERAL CONSUMERS WEBROOM**

19% OF OUTDOOR CONSUMERS SHOWROOM VS **50% OF GENERAL CONSUMERS SHOWROOM**[3]

70%

of U.S. outdoor consumers engage with tech for something outdoor related, whether to gather product information, interact socially or discover something new.

Outdoor consumers are less likely to webroom or showroom and more likely to shop with intent than the general consumer. Based on this, they look to brands and retailers to play an experiential and influential role in their purchase decisions. For instance, consumers who can view in-store inventory through a retailer's website or mobile app will expect other retailers to follow suit and offer the same functionality to streamline their shopping journey. Lagging retailers may be dropped from consumers' consideration sets. Successful retailers will integrate their digital and physical shopping experience to better serve customers.

Ultimately, outdoor consumers will choose retailers (online or brick-and-mortar) that offer the best experiences. As digital becomes more and more pervasive, the two concepts of brick-and-mortar and online will only continue to blur. As retailers with physical locations catch up with digital-led retailers, there will be no more online vs. offline; it will simply be the retail shopping experience. .

[3] *Deloitte*

HOW DO OUTDOOR CONSUMERS USE TECHNOLOGY TO SHOP?

RESEARCH/DISCOVERY:

22% To read reviews of outdoor products

21% To compare prices of outdoor products

20% For inspiration for new outdoor apparel, footwear or equipment

19% To discover new outdoor brands

19% To discover new outdoor retailers / places to shop

SOCIALIZE:

21% To share photos or videos of their outdoor activities

20% To discover new places to engage in their outdoor activity

18% To find like-minded people who share their interest in a specific outdoor activity

17% To share details about their outdoor activities

14% To feel like a part of an outdoor community

LEARN/TRACK:

20% To discover new places to engage in their outdoor activity

19% For inspiration for new outdoor activities

18% To learn a new outdoor activity

14% To feel like they're experiencing the outdoors

13% To track the performance of competitors in outdoor activities

12% To track their performance in outdoor activities

While online retailers are ahead of physical retailers when it comes to data capture, physical retailers can use digital technology in the physical space to capture data and optimize experiences for the consumer.

ONLINE STORES

- Track consumers as they click through different product pages
- Analyze what products are added to the shopping cart (what is purchased, removed or abandoned)
- Reduce checkout time by remembering payment and shipping details
- Offer personalized help through chat (bot or human)
- Real-time inventory levels automatically displayed on product page
- Product reviews displayed on product page
- Show product availability at physical store location

BRICK-AND-MORTAR STORES

- Track consumers as they walk through stores using Beacon technology
- Analyze what products are brought to dressing room through radio-frequency identification technology, or RFID for short (what is left in the dressing room or purchased)
- Reduce checkout time by allowing for Buy Online, Pick-Up in-Store (BOPUS)
- Offer personalized help through associate on sales floor
- Show real-time inventory on store device or consumer device through app
- Show product reviews from website on price label

BRAND SPOTLIGHT

Smart stores

Timberland recently placed RFID chips in all of its products at its New York location. When items with the chips are placed near tablets located throughout the store, product information is displayed. Related and recommended items are also displayed and the customer can choose to add items to a personal collection. This list can be saved to the cloud and/or emailed to the customer.

In-store displays

Best Buy printed in-store price displays now feature star ratings from its website. This simple integration of online and brick-and-mortar gives consumers the information that they would normally hunt for on their smartphones while in the store.

HOW DO VIRTUAL REALITY AND AUGMENTED REALITY FIT IN?

Virtual Reality is five to 10 years away from mainstream adoption[4] with clothing and apparel being the most considered product for consumer to shop for with VR.[5]

Outdoor brands and retailers that have used VR mostly offered experiences instead of product catalogs. These experiences speak to The Urban Athlete and The Aspirational Core outdoor consumer segments as they engage with technology more often, skew younger and more urban, and enjoy the easily accessed experiential aspect that VR offers. A key benefit to this type of technology can offer an outdoor adventure to those who aren't physically, mentally and/or financially able to experience it otherwise. The challenge for retailers is to offer a truly realistic and authentic experience through VR for outdoor consumers.

BRAND SPOTLIGHT

VR expriences

Moosejaw recently released a virtual reality experience through its app that allows users to experience 3-4 minutes of 360° videos of rock climbing, trail running and yoga. These videos can be viewed on smartphones and used with a Google Cardboard viewer available from Moosejaw free with any purchase. Prior to loading the videos, the products used in the VR adventure are displayed and can be purchased through Moosejaw.

Merrell created the first "walk around" use of virtual reality by letting willing participants strap on an Oculus Rift VR viewer to walk across a virtual rickety bridge high in the Dolomites. The harrowing, though virtual, experience was tied to the launch of Merrell's Capra hiking boot and effectively illustrated the importance of quality footwear in adventurous, outdoor situations.

AUGMENTED REALITY

Augmented Reality is more mainstream than Virtual Reality offerings. Unlike VR, AR overlays graphics and information onto one's actual field of vision. Snapchat and Pokémon Go show that successful augmented reality experiences are accessible and useful with off-the-shelf smartphone technology.

AR experiences don't have to live strictly on smartphones. Some retailers have implemented smart mirrors in dressing rooms and even on products themselves to showcase specs, reviews, usage tips and more.

BRAND SPOTLIGHT

Smart mirrors

Ralph Lauren's flagship store in Manhattan installed Oak Lab's smart mirror technology. Using RFID technology, the system recognizes items that are brought into the fitting room, offers personalized tips, other available colors, sizes and styles, can call an associate for assistance, and even change the lighting — all with a press and swipe of a finger. Uniqlo has also launched a smart mirror in select stores.

Smart products

RideOn's AR ski goggles allow a consumer to overlay information in their line of sight to enhance their experience on the slopes. Skiers and snowboarders who use the goggles can display their location on the mountain, speed, direction and a map.

While VR and AR are up to 10 years away from mainstream adoption, brands and retailers should begin their research now and evaluate if the investment into this innovative technology truly would add value to the consumer shopping and buy experience and not just offer an experience for experience sake.

[4] *Gartner*
[5] *Walker Sands*

three

GET TO YES

Physical retail stores will not go extinct; they just need to shift to provide more consumer experience innovations. A consumer has every reason to meander on the path to purchase. Because that path has grown more complex, is dynamic and is constantly interrupted, perceptive brands and retailers that ease the purchasing process by reducing the distance between thinking and buying will win. Again, brands that offer curation and experiences are more likely to garner customer loyalty, but curation and experience can only do so much for their bottom line: What matters are the conversions and sales.

Some retailers are taking a more innovative approach to providing a truly remarkable in-store experience. These retailers target consumers in an experiencing mode.

BRAND SPOTLIGHT

Experiences

B8ta is a retail store with locations in Palo Alto, Santa Monica and Seattle that offers consumers a try-before-you-buy experience with up-and-coming tech products. B8ta curates a remarkable number of brands, especially newer brands that pay a subscription fee in exchange for product visibility, a share of sales revenue and feedback on consumer behavior.

Reinvention

STORY is a retail concept that takes the point of view of a magazine, changes merchandise like a gallery and sells things like a traditional store. Every four-to-eight weeks, STORY completely reinvents itself – from the design to the merchandise – with the goal of bringing to light a new theme, trend or issue for consumers.

BUILD BRAND ADVOCACY

The Achiever, The Outdoor Native, and The Athleisurist outdoor consumer segments all use technology to learn about new outdoor activities, brands and products. A great time to engage with outdoor consumers who may be in a learning mode is throughout the entire purchase journey, especially digitally during post-purchase. Delivering post-purchase content that demonstrates transparency, community and continued education could be a great win for brands and retailers that are trying to build loyalty and advocacy. The Urban Athlete segment is also a particularly good target for this approach and messaging.

BRAND SPOTLIGHT

Follow through

Amazon and Wayfair send out post-purchase emails asking consumers about their purchasing and post-purchase experience. Personalized recommendations, discounts and chances to win gift cards provide value to post-purchase consumers, but also value to the company in the form of reviews that can immediately be placed on product pages.

Community

GoPro is known for its portable high-definition cameras, although GoPro really sees itself as a content company. GoPro promotes and utilizes the compelling, authentic content created by their consumers, which helps increase peer-to-peer awareness and drives more demand.

Transparency

Everlane's policy of radical transparency is in every part of the company's operations. Most companies claim sourcing or pricing transparency, but Everlane goes beyond its competitors, offering a deep look instead of a glimpse inside the factories that create every one of its products.

TERMS TO KNOW

CLIENTELING:

A technique used by retail sales associates to establish long-term relationships with key customers based on data about their preferences, behaviors and purchases.

SHIFTING FROM EMPLOYING SALES ASSOCIATES TO PRODUCT EXPERTS

In-store digital doesn't just empower consumers; it can also empower retail sales associates. The empowered consumer can check on inventory, tap into review and expert advice, and self-checkout without ever speaking to a retail associate in the store. So what role do retail associates play in the outdoor retail digital age? Surprisingly, 65% of consumers believe that in-store service is the best channel for tailored experience.[6]

An empowered sales associate can provide a clienteling experience to repeat customers and new customers. One hurdle for providing such an experience is that it requires personalization which requires identification.

Typically, consumers only identify themselves at the point of sale, usually giving a phone number or presenting a loyalty card. This doesn't offer associates much opportunity to provide a tailored experience, cross-sell or upsell before then. If a consumer self-identifies through a digital kiosk as they enter the brick-and-mortar store, a sales associate can pull up information on past purchases and begin to offer a personalized experience.

[6] *Accenture*

73%

of consumers say that product knowledge is what they need more from sales associates.

Experticity

Integrating the online and brick-and-mortar experience and making it seamless is also key for associates. For instance, what if a webroomer added an item to his cart, but abandoned the cart to see the item in person at the store? When the webroomer enters the store, through beacon technology, a store associate could see the webroomer's purchasing history and the item in his abandoned cart, and offer a personalized, tailored experience. Then based on the information gathered from the abandoned cart, the associate could make more educated recommendations and personalize the in-store experience. Turning them into more of a valued resource during the purchase process, now and in the future.

BRAND SPOTLIGHT

Endless aisle

Orvis, the fly fishing and outdoor apparel retailer, is testing a program that arms associates with a tablet connected to its entire brand catalog. Associates can help consumers quickly find the merchandise they need in-store and from the endless aisle of inventory in its warehouses. Transactions occur away from the cash register station through tablet Point Of Sale (POS).

Employee training

The Container Store, believing that one great person is equal to three good people, invests heavily in its employee and their training. First year, full-time employees receive 263 hours of formal training versus the industry average of just eight hours. Those training hours help to create a better experience for the customer and reduced employee turnover.

Unique, personalized service

Backcountry.com offers a personalized service to customers to connect with a passionate, likeminded "Gearhead." The Gearhead connects one-on-one, sometimes acting like a personal shopper sometimes like a fellow friend in the outdoors. Each Gearhead receives about one to three hours of training per week, and since implementation, Backcountry has seen a 95% lift in selling behavior and a 105% increase in ordering behavior.

Those store associates who completed one interactive training course sold

69%

more than those who didn't.

Salesforce

The motivation behind these initiatives is not only about empowering associates with technology, but also deep brand knowledge. Even though many outdoor consumers are on a mission when it comes to shopping, they may also be in a learning, playing or experiencing mode when they enter an online or brick-and-mortar store. Providing deep brand and product knowledge to store associates helps close sales and increases loyalty.

OUTDOOR CONSUMER SEGMENT'S PURCHASING JOURNEY MAPS

The outdoor consumers' purchasing journey is dynamic, interrupted and non-linear. These maps are general guides meant to illustrate one of many potential journeys that these outdoor consumer segments can and do take. The challenge for brands and retailers is to provide a seamless experience as consumers move back and forth in their journeys and across channels and devices.

THE ACHIEVER

Purchase Drivers:

Top of the line
Highly technical
Stylish
Performance enhancing
Price insensitive

Top brands used for outdoor activities *(over index):*

Columbia Sportswear Company

Ray-Ban

MOUNTAIN HARDWEAR

The Achiever shops for outdoor gear and apparel more frequently than other outdoor consumer segments, spends more on outdoor gear, and reports that they plan to increase their spending in the future. Members of this segment aren't particularly price sensitive; products and brands that offer both style and technical innovation will appeal to this segment.

The Achiever skews higher in both awareness and familiarity with non-traditional and traditional outdoor brands alike. They use a mix of outdoor, active, and fashion brands in their outdoor pursuits, including Under Armour, Timberland, Coleman, Columbia, The North Face and Ray Ban. Although they do not exhibit strong brand loyalty, a mission of social responsibility will resonate, particularly with an emphasis on sustainability for upcoming generations.

Technology is a key factor in the life of The Achiever. Members of this segment are heavy technology users in their social lives, as consumers and in the outdoors to monitor and enhance their performance. So much so that 23% of their annual spending on outdoor gear is allocated to electronics (just 18% among all outdoor consumers). The Achiever is invested in technology and also uses it actively in research and the shopping process (particularly Google and online retailers).

The Achiever is constantly on the lookout for new products that will enhance their outdoor performance and experiences. They are more likely to be multi-channel shoppers, purchasing both online and at brick and mortar locations. Brands and retailers that help seamlessly merge their outdoor activities with their social lives will find success in this segment. On the other hand, brands and retailers that don't have a strong social media presence will have difficulty reaching members of this segment as they research, shop, consume media and interact online.

THE ACHIEVER

PURCHASE JOURNEY EXAMPLE:

Goal:
Purchase a backcountry tent to use at Yellowstone National Park this summer.

1

Search Google for "best backcountry tent, Yellowstone."

AWARENESS

Modes:
Socializing
Learning
Browsing

2

I want to see how this sets up in person.

LOCATE

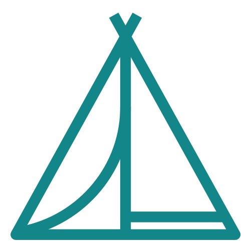
Modes:
Organizing
Planning

3

Visit REI to test out tents.

EVALUATE

Modes:
Playing
Evaluating



4

Even though it's cheaper on Amazon, I'll buy it through REI because I can always return it in-store instead of shipping it back to Amazon.

SHOPPING EXPERIENCE

Mode:
Comparing

5

REI's review site needs to have more opinions of real outdoorsy people like me.

SERVICE AND ADVOCACY

Mode:
Creating

THE ACHIEVER

PURCHASING JOURNEY MODES:

	DOING	THINKING	FEELING
AWARENESS **Modes:** *Socializing* *Learning* *Browsing*	Search Google for "best backcountry tent, Yellowstone." Consult other friends through text message and Facebook on recommendations for a good tent. View YouTube videos for reviews, setup and takedown tutorials of various brands	What's an easy way to set up a tent that's lightweight? What will enhance our performance at Yellowstone? Could it be used for other trips? Does it set up and break down easy for everyone on the trip?	My fellow travelers trust me to be the expert with the tent and outdoor adventure.
LOCATE **Modes:** *Organizing* *Planning*	Search mass merchandiser, general outdoor merchandisers online sites, check for local availability	Can I find this in town? Sometimes it can be hard to trust a brand's YouTube videos I want to see how this sets up in person	I don't want any surprises on the trip.
EVALUATE **Modes:** *Playing* *Evaluating*	Visits REI to test out tents Avoid talking to associates as much as possible	Is this going to perform well and be comfortable? Is it a good technical option? How will this look in photos? Do I need a traditional outdoor brand tent?	I'm an expert, I don't need to talk to anyone.
SHOPPING EXPERIENCE **Mode:** *Comparing*	Finds the particular tent is out of stock Compares prices online using smartphone on Amazon and eBay	Does this brand have a strong social mission? Amazon has Prime shipping for this, but it's tricky to return to Amazon. I can always return it in-store to REI.	Even though it's cheaper on Amazon, I'll buy it through REI because I can always return it in-store instead of shipping it back to Amazon.
SERVICE AND ADVOCACY **Mode:** *Creating*	After Yellowstone adventure, The Achiever posts on social media and writes a review through REI's website	Where else can I take this tent? REI's review site needs to have more opinions of real outdoorsy people like me.	Frustrated at the lack of detail in product reviews that didn't adequately cover the pros and cons of the tent.

THE ACHIEVER

PURCHASING JOURNEY TECHNOLOGY:

	TRADITIONAL TECHNOLOGY	NEW TECHNOLOGY	FUTURE TECHNOLOGY
AWARENESS	Traditional Media (TV, Radio, Print, OOH)	Social Media	Beacon, Cloud, RFID
EVALUATE	Touch and Feel	Online Reviews, Sales Associates	AR/VR/AI Assistant
SHOPPING EXPERIENCE	Stores	Multichannel, Buy Online, Pickup in Store (BOPUS)	Omnichannel
SERVICE	Telephone	Call Center	Communities, Personalization
ADVOCATE	Word of mouth	Social Media	Social Listening

Opportunities for reaching The Achiever on their path to purchase:

- *Connect through tech*
- *Offer deep, technical product information*
- *Celebrate and allow them an avenue to celebrate their expertise, knowledge and achievements*
- *Design products that seamlessly integrate with technology*
- *Share stories of continual innovation*

THE OUTDOOR NATIVE

Purchase Drivers:
Sensible
Versatile
Functional
Affordable

Top brands used for outdoor activities *(over index):*

THE NORTH FACE

Coleman

EVERY SEASON STARTS AT DICK'S SPORTING GOODS

Though similar in their levels of participation, The Outdoor Native and The Achiever differ on several key behaviors and motivations. The Outdoor Native is focused on being more sensible, and champions making memories over competition. Interestingly, they allocate an average of one-third of their outdoor gear budget to apparel. The Outdoor Native wants the best on the market with respect to function and versatility and is willing to pay for it. When shopping, they are more likely than members of other segments to be open to ideas, suggesting an upsell opportunity for brands and retailers.



In general, they are more likely to be aware and familiar with both traditional and non-traditional outdoor brands than average outdoor consumers. They favor and strongly identify with traditional outdoor and mainstream athletic brands, but tend to see fashion brands as separate from outdoor brands.

Although The Outdoor Native is less likely to use technology outdoors, they do invest time researching brands and products prior to purchase. Furthermore, nearly half buy outdoor gear at both brick-and-mortar and online retailers (compared to only 39% of all outdoor consumers), a pattern likely driven by the importance they place on the breadth of selection available through the channel. Given the emphasis they place on stores that provide a variety of brands and products, it isn't a surprise they are most likely to shop at sporting goods chain stores (e.g., Dick's Sporting Goods). Retailers and brands that provide function, versatility, and breadth are most likely to appeal to members of this segment.

THE OUTDOOR NATIVE

PURCHASE JOURNEY EXAMPLE:

Goal:
Replace six-year-old hiking boots with a new, innovative pair for an upcoming hiking trip on the Appalachian Trail.

1

Are non-traditional footwear brand options competitive with traditional footwear options?

AWARENESS

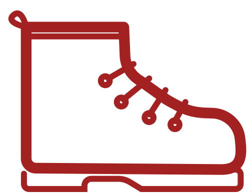
Modes:
Researching
Learning

2

Keeping track of these new retailers and websites is confusing. Best to go with what I know.

LOCATE

Mode:
Exploring



3

I need to see and try on different styles and colors.

EVALUATE

Mode:
Comparing

4

I'm sold on this experience and I don't feel like price comparison shopping; the sales associate made me feel great.

SHOPPING EXPERIENCE

Modes:
Evaluating
Socializing

5

After hiking a part of the Appalachian Trail, posts reviews and tips on thru-hiking online community.

SERVICE AND ADVOCACY

Mode:
Creating

THE OUTDOOR NATIVE

PURCHASING JOURNEY MODES:

	DOING	THINKING	FEELING
AWARENESS **Modes:** *Researching* *Learning*	Passively researching and keeping up-to-date on advances in outdoor gear through Google, online magazines and review sites	Are non-traditional footwear brand options competitive with traditional footwear options? Is this innovative technology in trail runners a true step forward or a flash in the pan? Are these flashy or sensible?	I feel somewhat uneasy about venturing outside their normal consideration set when it comes to traditional vs. non-traditional brands, but I want the most functional footwear.
LOCATE **Mode:** *Exploring*	Visits Dick's Sporting Goods to learn more about advances in footwear and to try out a few options found on their website	Is this the best place to find knowledgeable advice and recommendations?	Keeping track of these new retailers and websites is confusing. Best to go with what you know.
EVALUATE **Mode:** *Comparing*	Seeing and trying on different styles and colors	Is this innovative technology worth the price? Are these non-traditional brands worthy? Are these the best in the market? What else can I do with these after hiking the Appalachian Trail?	I feel excited by the breadth of selection at Dick's.
SHOPPING EXPERIENCE **Modes:** *Evaluating* *Socializing*	Engaging with a sales associate who has experience hiking Trying out the boots	I hadn't thought of a few tricks and products that the sales associate offered me for when I'm on the trail. I wish Dick's had a better way to test these boots. I'm sold on this experience and I don't feel like price comparison shopping; the sales associate made me feel great.	It's great to be able to talk to someone who's actually been thru-hiking to hear advice and practical tips on what other gear I should take with me.
SERVICE AND ADVOCACY **Mode:** *Creating*	After hiking a part of the Appalachian Trail, posts reviews and tips on thru-hiking online community	It's not just about sharing tips, but processing the experience of the trail.	I feel proud and accomplished, sharing stories and tips.

THE OUTDOOR NATIVE

PURCHASING JOURNEY TECHNOLOGY:

	TRADITIONAL TECHNOLOGY	NEW TECHNOLOGY	FUTURE TECHNOLOGY
AWARENESS	Traditional Media (TV, Radio, Print, OOH)	Social Media	Beacon, Cloud, RFID
EVALUATE	Touch and Feel	Online Reviews, Sales Associates	AR/VR/AI Assistant
SHOPPING EXPERIENCE	Stores	Multichannel, Buy Online, Pickup in Store (BOPUS)	Omnichannel
SERVICE	Telephone	Call Center	Communities, Personalization
ADVOCATE	Word of mouth	Social Media	Social Listening

Opportunities for reaching The Outdoor Native on their path to purchase:

- *Connect digitally and locally*
- *Offer brick and mortar locations as community hubs. Think beyond just a transactional, retail location to more of a destination that offers a rich experience*
- *Establish strong online review and referral programs*
- *Use local professionals as brand ambassadors*

THE URBAN ATHLETE

Purchase Drivers:
Stylish
Highly technical
Athletic
Performance oriented

Top brands used for outdoor activities *(over index):*

adidas

GAP

salomon

The Urban Athlete segment represents 20% of the outdoor consumer population, but represents an impressive 33% of the total spent on outdoor apparel, footwear, equipment and gadgets. They differ from The Outdoor Native as they don't necessarily consider themselves outdoorsy or rugged, but are intense and competitive.

Members of this segment will pay more for stylish and technical gear specifically designed for their active pursuits. They are more likely than members of other segments to buy on impulse when shopping.

The Urban Athlete mostly associates Nike with the outdoors, followed by a variety of athletic and traditional outdoor brands. Although they use/buy traditional outdoor brands as often as most engaged segments, they identify more closely with athletic brands and style. Members of this segment feel that traditional outdoor brands don't really speak to them, suggesting there is an opportunity for those brands to make themselves relevant to members of this segment.

Technology is a key factor in the life of The Urban Athlete. They are heavy technology users in their social lives, as consumers and in the outdoors. So much so that 24% of their annual spending on outdoor gear is allocated to electronics (more than any other segment). Brands and retailers will succeed in this segment when they help them integrate their penchant for competition, desire to improve performance and motivation to connect with others through technology.

The Urban Athlete is more likely than the average outdoor consumer to shop only online, likely driven by the fact that they want it all: stores that provide products for the whole family, a selection of products (e.g., apparel, footwear and equipment) and location convenience. Although they do look for low prices, The Urban Athlete is more likely than the average outdoor consumer to look for stores that offer mobile shopping apps, classes for beginners and equipment for rent. Brands and retailers that don't have a strong online presence will have difficulty reaching members of this segment.

THE URBAN ATHLETE

PURCHASE JOURNEY EXAMPLE:

Watched highlights from a bike race and decided to research the rider's bike models to learn more about them. This consumer journey doesn't start strictly as a path to purchase. It's a reminder that some consumers are not yet looking to make a purchase and enjoy meandering.

1

Searching Twitter and YouTube videos for local bike race results and stories on smartphone.

AWARENESS

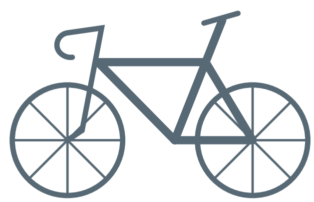
Modes:
Entertainment
Relaxing
Socializing

2

I like that rider's bike and jacket, I wish I could try them out in person at a store close to me.

LOCATE

Modes:
Researching
Browsing



3

Compare the race bikes and apparel to more mainstream brands online.

EVALUATE

Mode:
Comparing

4

So glad I can use Apple Pay through their mobile site.

SHOPPING EXPERIENCE

Mode:
Rapidly purchasing

5

I have to post a picture of my new bike and jacket. The guys are going to be so jealous.

SERVICE AND ADVOCACY

Modes:
Sharing
Socializing

THE URBAN ATHLETE
PURCHASING JOURNEY MODES:

	DOING	THINKING	FEELING
AWARENESS **Modes:** *Entertainment* *Relaxing* *Socializing*	Searching Twitter and YouTube videos for local bike race results and stories on smartphone	What kind of equipment are these racers using? Am I at this level yet?	I feel inspired to take racing pursuit to the next level.
LOCATE **Modes:** *Researching* *Browsing*	Google search of winning racer's Pinarello bike model Switches to visit Ornot.com to leisurely browse	There aren't any shops that carry Pinarello locally. Hope the website offers the level of detail I need to see what's available.	I'm frustrated at the lack of outdoor retailer options in the city. I'm appreciative of Ornot's indie, trendy and simplistic vibe.
EVALUATE **Mode:** *Comparing*	Compares Ornot's offerings to a more traditional cycling apparel company	These traditional outdoor brands just don't get me. I don't want to look like a lycra-clad billboard.	I'm happy that small boutiques respond to a different type of consumer.
SHOPPING EXPERIENCE **Mode:** *Rapidly purchasing*	Quickly purchases a new Wind Jacket 3.0	This looks seriously stylish. So glad I can use Apple Pay through their mobile site.	Even though Pinarellos are a little out of my league right now and I can't check them out in person, I'm excited that my new jacket is going to be here in three days!
SERVICE AND ADVOCACY **Modes:** *Sharing* *Socializing*	Shares Pinarello bike image and new jacket purchase on Facebook	I have to show the guys what my bike looks like and also my new jacket. They're going to be so jealous.	Love that I can just share these right from the store's sites.

THE URBAN ATHLETE

PURCHASING JOURNEY TECHNOLOGY:

	TRADITIONAL TECHNOLOGY	NEW TECHNOLOGY	FUTURE TECHNOLOGY
AWARENESS	Traditional Media (TV, Radio, Print, OOH)	Social Media	Beacon, Cloud, RFID
EVALUATE	Touch and Feel	Online Reviews, Sales Associates	AR/VR/AI Assistant
SHOPPING EXPERIENCE	Stores	Multichannel, Buy Online, Pickup in Store (BOPUS)	Omnichannel
SERVICE	Telephone	Call Center	Communities, Personalization
ADVOCATE	Word of mouth	Social Media	Social Listening

Opportunities for reaching The Urban Athlete on their path to purchase:

- *Provide time-saving and convenience-oriented solutions*
- *Lead with fashion, follow with function*
- *Curate offerings that are unique*
- *Disrupt, don't follow*
- *Feature how-to videos*
- *Enable them to share their outdoor experiences*

THE ASPIRATIONAL CORE

Purchase Drivers:
Activity specific
A rental user
Athletic styling

Top brands used for outdoor activities *(over index):*

NIKE

OAKLEY

GoPro

Members of The Aspirational Core shop frequently, but are more style-conscious and lean toward athletic brands over traditional outdoor brands to help them play the part of an active outdoorist. They identify and want to associate with outdoor brands, but have a wide view of what constitutes an outdoor brand, including athletic, fashion and yoga brands. As such, they are less interested in technical features than other segments and take a middle-of-the-road approach to gear and experiences.

Members of this segment are driven by the need for quality gear at a good price-point and the desire to fit in at an entry-level. They lean toward brands that are well known and are more likely to use brands like Nike, Adidas and Under Armour for outdoor activities by a wide margin.

The majority of The Aspirational Core segment research online and buy outdoor apparel and gear at brick and mortar retailers. The Aspirational Core wants stores that are conveniently located and offer low prices on name brand gear, so they frequently shop outdoor specialty outlet stores. Demo and rental programs also offer an opportunity to capture market share among this segment since they are particularly open to trying a variety of activities and renting gear initially to outfit themselves for it.

Members of the Aspirational Core are more likely than the average outdoor consumer to use smartphones in their everyday lives. More than one-third uses their smartphone to stay in contact with others during their outdoor activities. The Aspirational Core can be found online. Most use Facebook, Google and YouTube on a regular basis and they are more likely than the average outdoor consumer to use Instagram. Brands and retailers without a strong social media presence will have difficulty reaching this segment, as they are more likely than other segments to research, consumer media and interact online.

THE ASPIRATIONAL CORE

PURCHASE JOURNEY EXAMPLE:

Goal:
Buy a touring kayak for an upcoming guys camping weekend.

1

Casually clicking through a friend's Facebook photos that feature a new Eddyline kayak.

AWARENESS

Modes:
Socializing
Researching

2

I should rent different models before even thinking about buying.

LOCATE

Mode:
Discovery

3

I'm overwhelmed by choices, but the price will be the ultimate deciding factor on purchasing or continuing to rent.

EVALUATE

Mode:
Mining (for Intel)

4

I wonder what my friend thinks of his Eddyline?

SHOPPING EXPERIENCE

Modes:
Comparing
Learning

5

I'm part of the tribe now.

SERVICE AND ADVOCACY

Modes:
Fantasizing
Socializing

THE ASPIRATIONAL CORE

PURCHASING JOURNEY MODES:

	DOING	THINKING	FEELING
AWARENESS **Modes:** *Socializing* *Researching*	Casually clicking through a friend's Facebook photos that feature a new Eddyline kayak	That's a really cool Eddyline, but they can be spendy. I really liked the last one I rented. Am I ready to take this hobby to the next level? Do I have room for this?	I'm inspired to think about purchasing a kayak.
LOCATE **Mode:** *Discovery*	Find portable, cost effective kayaks online and find out about local availability	I know what I like and don't like from renting.	I should rent different models before even thinking about buying.
EVALUATE **Mode:** *Mining (for Intel)*	Looks through old emails of receipts that list kayaks he previously rented and compares those models to other kayak options online	I wish there was a better way to organize this history and compare all these different models. I wish there was an easier way to calculate the cost of renting vs. buying. What do others like me think of these kayaks?	I'm overwhelmed by choices, but the price will be the ultimate deciding factor on purchasing or continuing to rent.
SHOPPING EXPERIENCE **Modes:** *Comparing* *Learning*	Visits Eddyline website, uses the Dealer Locator to find brick and mortar stores and websites that carry Eddyline kayaks Finds the online store of local shop through Dealer Locator function	There is a outdoor store by my office, I can stop there on the way home and see what they have I wonder what my friend thinks of his Eddyline? What do the online reviews say? I wonder what the store associates think of Eddyline?	I'm frustrated by all the choices online, but lack of choice in-store. I'm happy that the sales associate pointed out features he hadn't considered. I feel assured that home delivery won't be an issue. I'm excited he could purchase the kayak either in-store or online.
SERVICE AND ADVOCACY **Modes:** *Fantasizing* *Socializing*	Tracks package through app Posts photo of kayak to friend's Facebook wall	I'm part of the tribe now.	I'm excited to know exactly when my new kayak is arriving, so I can be home for when it's delivered.

THE ASPIRATIONAL CORE

PURCHASING JOURNEY TECHNOLOGY:

	TRADITIONAL TECHNOLOGY	NEW TECHNOLOGY	FUTURE TECHNOLOGY
AWARENESS	Traditional Media (TV, Radio, Print, OOH)	Social Media	Beacon, Cloud, RFID
EVALUATE	Touch and Feel	Online Reviews, Sales Associates	AR/VR/AI Assistant
SHOPPING EXPERIENCE	Stores	Multichannel, Buy Online, Pickup in Store (BOPUS)	Omnichannel
SERVICE	Telephone	Call Center	Communities, Personalization
ADVOCATE	Word of mouth	Social Media	Social Listening

Opportunities for reaching The Aspirational Core on their path to purchase:

- *Promote entry-level apparel and gear*
- *Message seasonal discounts and promotions*
- *Provide access to gear and expertise, not ownership*
- *Give them experiences (rental, trials and courses)*
- *Be very active on your social channels*

THE ATHLEISURIST

Purchase Drivers:
Sensible basics
Versatile
Comfortable
Durable
Affordable

Top brands used for outdoor activities *(over index):*

Coleman

Cabela's

L.L.Bean

Although The Athleisurist is one of the largest U.S. outdoor consumer segments, it is among the lowest for total outdoor spending. Members of this segment have a "good enough" mentality and look for sensible basics at a reasonable price and, as such, tend to default to more mainstream brands and mass retailers. They consider themselves more outdoorsy and nature focused rather than active and intensity focused.

The Athleisurist's awareness of technical or style-oriented outdoor brands lags behind that of the average outdoor consumer. They seeks durable, versatile and comfortable outdoor lifestyle apparel. Often without professional and social demands, they prefer to wear athletic-leisurewear throughout the day. They favor low-priced and lasting over expensive and trendy.

They are more familiar with mainstream brands and retailers such as Target, Eddie Bauer and Nike. Members of this segment prefer to buy from long-standing outdoor brands such as Land's End, L.L. Bean and Coleman, but they don't really identify with outdoor brands – just the benefits of functionality and price. That's why members of this segment are good candidates for entry-level products and packaged goods.

The Athleisurist is very conservative when it comes to technology. They believe that the outdoors is a place to escape from technology. They are less likely than the average outdoor consumer to own a smartphone, tablet and/or other tech gadgets.

THE ATHLEISURIST

PURCHASE JOURNEY EXAMPLE:

Goal:
Replace a 10-year-old raincoat.

1

I don't need the best, just need a sensible, functional and inexpensive jacket.

AWARENESS

Mode:
Searching

2

I'm stressed at how anyone could sort through all these options.

LOCATE

Mode:
Browsing

3

It's so hard to trust some of these online reviews. I guess I just have to check them out myself.

EVALUATE

Mode:
Rapid Learning

4

Stops by Cabela's during a shopping run just to see if they have any options.

SHOPPING EXPERIENCE

Mode:
Evaluating

5

Won't have to do that for another 10 years!

SERVICE AND ADVOCACY

Mode:
Socializing

THE ATHLEISURIST

PURCHASING JOURNEY MODES:

	DOING	THINKING	FEELING
AWARENESS **Mode:** *Searching*	Googles “Women’s Rain Jackets” on tablet	I don’t need the best, just need a sensible, functional and inexpensive jacket.	I just want to find this jacket and get this over with.
LOCATE **Mode:** *Browsing*	Casually looked through Columbia’s website and found a reasonable and versatile rain jacket	What do people think of these jackets? Why isn’t there just a simple, basic jacket? Columbia is a name I recognize.	I’m stressed at how anyone could sort through all these options.
EVALUATE **Mode:** *Rapid Learning*	Visits Amazon.com to quickly skim reviews of Columbia rain jackets	It’s so hard to trust some of these opinions. I guess I just have to check them out myself. Will this jacket last as long as the previous one?	I feel exhausted at the amount of work that goes into finding even just the ‘good enough’ jacket.
SHOPPING EXPERIENCE **Mode:** *Evaluating*	Stops by Cabela’s during a shopping run just to see if they have any options Finds a similar jacket that’s marked down because it’s last year’s model	This is worth a shot. I don’t know all this technical jargon. I just want it to keep me dry. Last year’s model vs. this year’s model? Who cares? This feels pretty durable.	I feel elated at my bargain hunting and minimal time spent researching and purchasing.
SERVICE AND ADVOCACY **Mode:** *Socializing*	Shares her good find with her husband at home and with friends	Won’t have to do that for another 10 years!	I feel content that my jacket keeps me dry without any hassle.

THE ATHLEISURIST

PURCHASING JOURNEY TECHNOLOGY:

	TRADITIONAL TECHNOLOGY	NEW TECHNOLOGY	FUTURE TECHNOLOGY
AWARENESS	Traditional Media (TV, Radio, Print, OOH)	Social Media	Beacon, Cloud, RFID
EVALUATE	Touch and Feel	Online Reviews, Sales Associates	AR/VR/AI Assistant
SHOPPING EXPERIENCE	Stores	Multichannel, Buy Online, Pickup in Store (BOPUS)	Omnichannel
SERVICE	Telephone	Call Center	Communities, Personalization
ADVOCATE	Word of mouth	Social Media	Social Listening

Opportunities for reaching The Athleisurist on their path to purchase:

- *Be approachable; avoid talking about specialized or technical gear*
- *Speak to their price-conscious mentality*
- *Engage with them through print, television, radio ads and catalogs*

KEY TAKEAWAYS & OPPORTUNITIES

The strategies to winning with the outdoor consumer on the new path to purchase needs to change with the growth of digital technology and channels. This may seem like a daunting and expensive task. For larger retailers and brands, it could mean adapting legacy IT systems or creating new ones altogether or incorporating new technology to compete. Smaller retailers and brands may consider how they can improve customer service, adapt hang tags, update website content or increase their social channels to speak to consumers and their modes over the course of a journey. Whatever the adaptation, keep in mind that new retail technology and data analytics are not cure-alls for creating delightful consumer experiences. Winning the outdoor consumer journey is about understanding the mode/context the consumer is in (physically and mentally), and what they're trying to accomplish – and responding in kind.

EMBRACE THE CUSTOMER-LED JOURNEY

Consumers are more educated than ever and are well aware of the myriad of options available. They actively guide their own purchase journey and "pull" in information. Brands will succeed by providing useful, timely information at every step of the purchase journey across retail channels and marketing mediums. Follow the lead of brands like REI and online retailers like Amazon. REI understands that consumers can be in researching, playing and socializing modes so they provide tools that support those modes and help consumers get jobs done. Amazon similarly provides tools to help consumers in researching modes with a queue of recommendations and suggestions of items purchased together.

PERSONALIZE WHERE YOU CAN

Personalization doesn't require intense data mining capabilities feeding a recommendation engine. Clienteling and personalization is all about establishing a long-term relationship and truly knowing your customers. Consider how your brand can empower sales associates through additional training, and leverage existing customer relationship management programs and tools to lead to better personalization. Smart, proactive engagement with your customers, like follow up calls and emails to advance the loyalty loop, pre-shopping text or email "suggestions for you," and timely mode-targeted in-store information, goes a long way to show you understand their needs and expectations – without them feeling like they're getting the hard-sell pitch.

TARGET SPECIFIC CONSUMER MODES

Modes are universal and cut through demographics. Modes are arguably the best way to reach seemingly different segments. Though The Achiever and The Athleisurist may differ in terms of brand choices, outdoor pursuits and goals, they are similar when in common modes and mindsets. When you build value propositions around modes and jobs that recur, you're creating a more effective, customer-centric — and efficient — marketing strategy in a digital world.

REDUCE THE DISTANCE BETWEEN THINKING AND DOING

Consumers have every reason to meander, pause, leave a store or abandon an online shopping cart. Reducing the distance between thinking and doing can be as easy as making the checkout process more streamlined or remembering payment information. It can be a better response time to social and other engagement, or providing on-the-spot self serve information usually has to be accessed online or through sales associates. Your own "job to be done" in this new reality is to be forward-looking in your intent to create a more dynamic way of doing business with your customers.

CONSUMERVUE METHODOLOGY

In the summer of 2014, both qualitative and quantitative research was conducted by Egg Strategy. 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 2,563 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 (e.g., Blacks/African Americans, Hispanics, Asians). To qualify, respondents were required to meet the following criteria:

- Spent at least one hour outside per week
- Participated in a variety of outdoor activities at least once in the past 12 months (out of 24 traditional outdoor activities and 24 nontraditional activities)
- Purchased apparel, footwear or equipment for use in outdoor activities

Although all surveys are subject to sampling error, the sample of 2,563 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 consumers on key demographic characteristics.

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Design: Lisa Wright, Obsesso Processo

ABOUT SPAWN IDEAS

Headquartered in Anchorage, with offices in Denver and Seattle, Spawn Ideas is an employee-owned, full service agency specializing in consumer insights. Spawn focuses on the outdoor consumer's modes and micro-moments, helping clients efficiently market across personas within a digital context channel strategy. For more information or to speak with someone about your brand's marketing needs, visit ***spawnak.com*** or call ***907.865.9547***.

ABOUT THE OUTDOOR INDUSTRY ASSOCIATION

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*** or call ***303.444.3353***.

[i] 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)

[i] Nontraditional 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., farmers' 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

ConsumerVue utilizes strict data collection methodologies, and the integrity of the data is of utmost importance. The information provided is intended to be used internally by members. If members and third parties seek to cite the information for internal and external materials, please follow the OIA research citation rules:

- 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.
- All citations of OIA research and tools must be attributed in the following manner: Title, Outdoor Industry Association, Date.

For external usage beyond data and information citation, please work directly with OIA for guidance and approval. For more information, visit ***www.outdoorindustry.org*** or call ***303.444.3353***.

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