

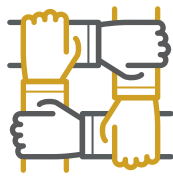
Source: 2014 outdoor consumer segmentation study conducted by Outdoor Industry Association

# MILLENNIAL OUTDOOR CONSUMERS

Representing 38% of the U.S. outdoor consumer population, Millennials spend more time outside and more money on outdoor products than the average outdoor consumer, making them a valuable long-term target market for the industry.

## WHO ARE THEY?

Compared to all outdoor consumers, Millennial outdoor consumers tend to be...



ETHNICALLY DIVERSE








SLIGHTLY MORE FEMALE



MORE LIKELY TO HAVE KIDS AT HOME



MORE LIKELY TO LIVE IN CITY CENTERS

	 MALE	 FEMALE	 LIVE IN CITY CENTERS	 HAVE KIDS	 ETHNICITY
MILLENNIAL CONSUMERS	47%	53%	30%	52%*	CAUCASIAN 55% <sup>*</sup> HISPANIC 22% <sup>*</sup> BLACK/AFRICAN AMERICAN 14% ASIAN 7% <sup>*</sup> OTHER 2%
ALL OUTDOOR CONSUMERS	49%	51%	21%	43%	CAUCASIAN 64% HISPANIC 17% BLACK/AFRICAN AMERICAN 13% ASIAN 5% OTHER 2%

## WHICH SEGMENTS ARE THEY IN?

Millennial outdoor consumers are more likely to be...



THE ACHIEVER



THE URBAN ATHLETE



THE ASPIRATIONAL CORE

## WHY ARE THEY VALUABLE TO OUTDOOR?

SPEND MORE TIME OUTSIDE (MEAN # PER WEEK)



CONSIDER THEMSELVES MORE OUTDOORSY (TOP TWO BOX)



SPEND MORE ANNUALLY ON OUTDOOR APPAREL, FOOTWEAR, EQUIPMENT AND ELECTRONICS



MILLENNIAL CONSUMERS  
ALL OUTDOOR CONSUMERS

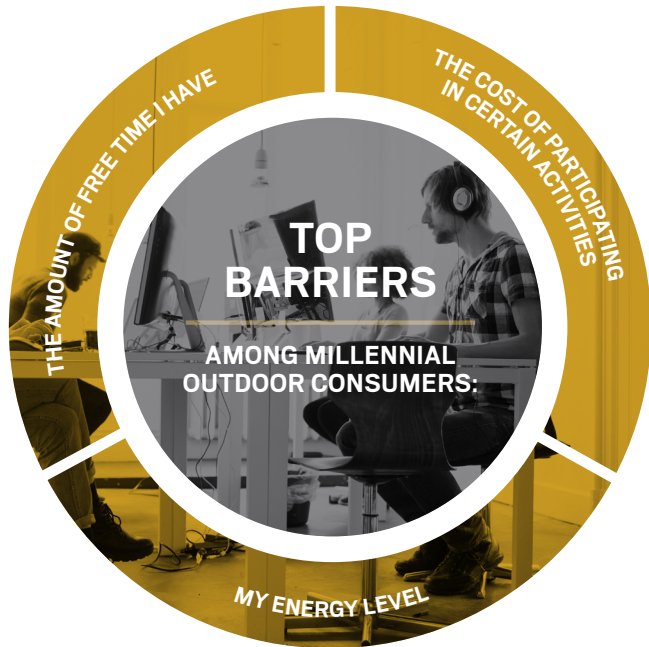
## WHAT GETS THEM OUTSIDE?

Driven by both emotional and physical values to get outdoors, family time is also important.



## WHAT PREVENTS THEM FROM GETTING OUTSIDE?

Cost and limited free time play a significant role in preventing them from spending more time outside.



## WHAT ACTIVITIES DO THEY DO?

Rather than specializing in one or two, Millennials are more interested in trying a variety of new outdoor activities (45%\* vs. 33%) than the average outdoor consumer. Often driven by social experiences, they are more likely to participate in outdoor activities with friends than by themselves (13%^ vs. 20%).

### TRADITIONAL



RUNNING / JOGGING (OUTDOORS)



PARTICIPATING IN A RUNNING RACE (E.G., 5K, 10K, MARATHON, TRIATHLON)



SURFING



SNOWBOARDING

### NON-TRADITIONAL



YOGA (INDOORS)



PLAYING TEAM SPORTS (OUTDOORS)



OUTDOOR YOGA (ON A BEACH, IN A PARK)

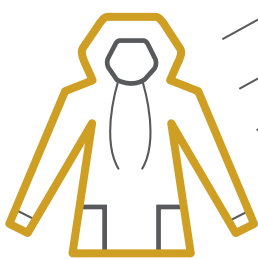


PARTICIPATING IN AN OBSTACLE RACE (E.G. TOUGH MUDDER)

## HOW DO THEY SHOP?

Style and peer recommendation play a key role in their selection process. Since they are less likely to shop on a mission, they look to retailers to inspire them in their outdoor pursuits.

MILLENNIALS ARE WILLING TO PAY MORE FOR OUTDOOR APPAREL AND GEAR THAT ARE THE FOLLOWING:



- REVIEWED HIGHLY BY OTHERS
- STYLISH
- MAKES ME LOOK ATHLETIC
- RECOMMENDED BY FRIENDS OR FAMILY
- SOMETHING MY FRIENDS / FAMILY USE OR WEAR

TOP THINGS THEY LOOK FOR IN A RETAILER:



- OFFERS PRODUCTS FOR BEGINNERS
- INSPIRES ME TO PARTICIPATE IN NEW OUTDOOR ACTIVITIES
- OFFERS CLASSES FOR BEGINNERS
- HAS A MOBILE SHOPPING APP

## WHERE CAN I ENGAGE THEM?

Millennial outdoor consumers are connected in every aspect of their lives.

AVERAGE HOURS SPENT PER WEEK:

LISTENING TO STREAMING MUSIC OR PODCASTS



WATCHING TIME-SHIFTED TV (I.E. DVR, ON-DEMAND)



USING SMARTPHONE APPS



SPENDING TIME ON SOCIAL NETWORKING SITES



STREAMING MOVIES



VISIT THE FOLLOWING SITES ON A REGULAR BASIS:

FACEBOOK



GOOGLE



YOUTUBE

