



provoke  
insights

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Consumer Trends  
The Outdoors  
Winter 2023

# Background & Objectives

## Overview

Provoke Insights, a leader in research for branding, advertising, media, and content marketing initiatives, conducts a bi-annual consumer trends study to keep a pulse on the market across multiple industries. The extensive study allows Provoke Insights to stay ahead of the trends and understand consumer mindset in the current moment.

## Winter 2023 Wave

Three years since Covid began, fears of the pandemic have decreased, but consumers have other growing concerns, from inflation to the economy. Provoke Insights wants to understand how these new issues impact consumers' buying behavior. In this wave, Provoke Insights dives deep to understand how these new issues have impacted category buying behavior.

This deck focuses on the outdoors sector.

## Methodology

Provoke Insights conducted a 15-minute survey among 1,500 Americans between the ages of 21 and 65. The study was in-field in Autumn 2022.

A random stratified sample was used followed by weighting to ensure a high degree of representation of the U.S. population (household income, age, gender, geography, ethnicity, and children in the household).<sup>1</sup>

Results based on this sample have a maximum margin of sampling error of  $\pm 2.5\%$  at a 95% confidence level.

Statistical differences between subgroups indicated in this report were tested at a 95% confidence level.

# Overview



## Current State of the Market

Consumers fear their financial future as the economy and inflation are major concerns. They are experiencing price increases first-hand, particularly at supermarkets and restaurants. As a result, budgets are tightening. Consumers are eating more at home, making fewer impulse purchases, and buying store-label brands.



## Outdoor Gear

As more people return to indoor activities due to fewer concerns with Covid-19, outdoor gear purchase levels are dropping slightly. While consumers have a brand preference, they are strongly influenced by what is available at the retailer. As a result, this sector must ensure its products are available at multiple online and in-person retailers.



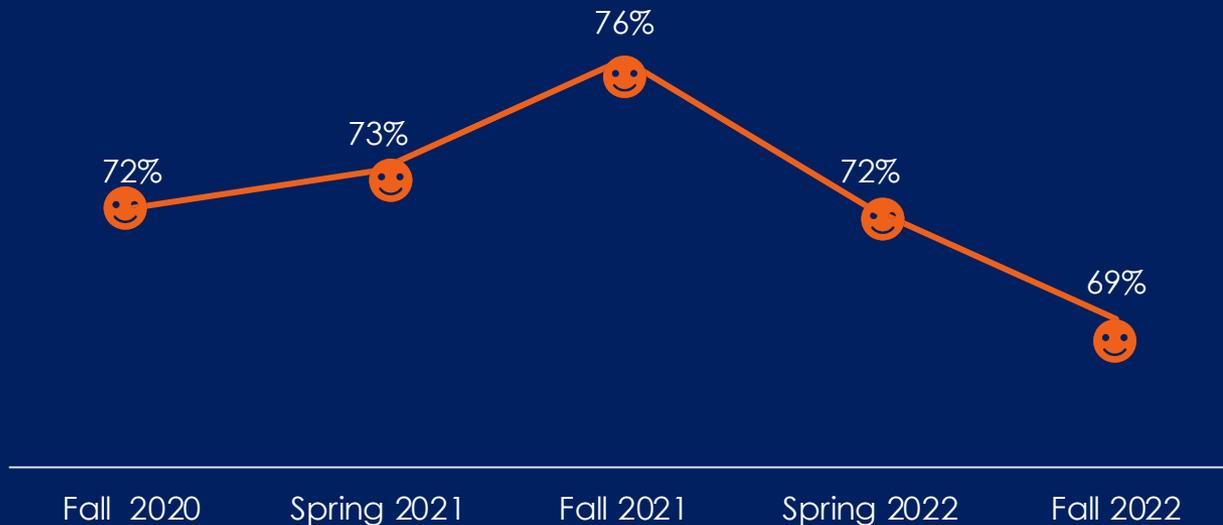
What External Trends are Impacting Brands Today?



# Consumer Optimism

Optimism levels have declined to below where they were during the peak of the Pandemic.

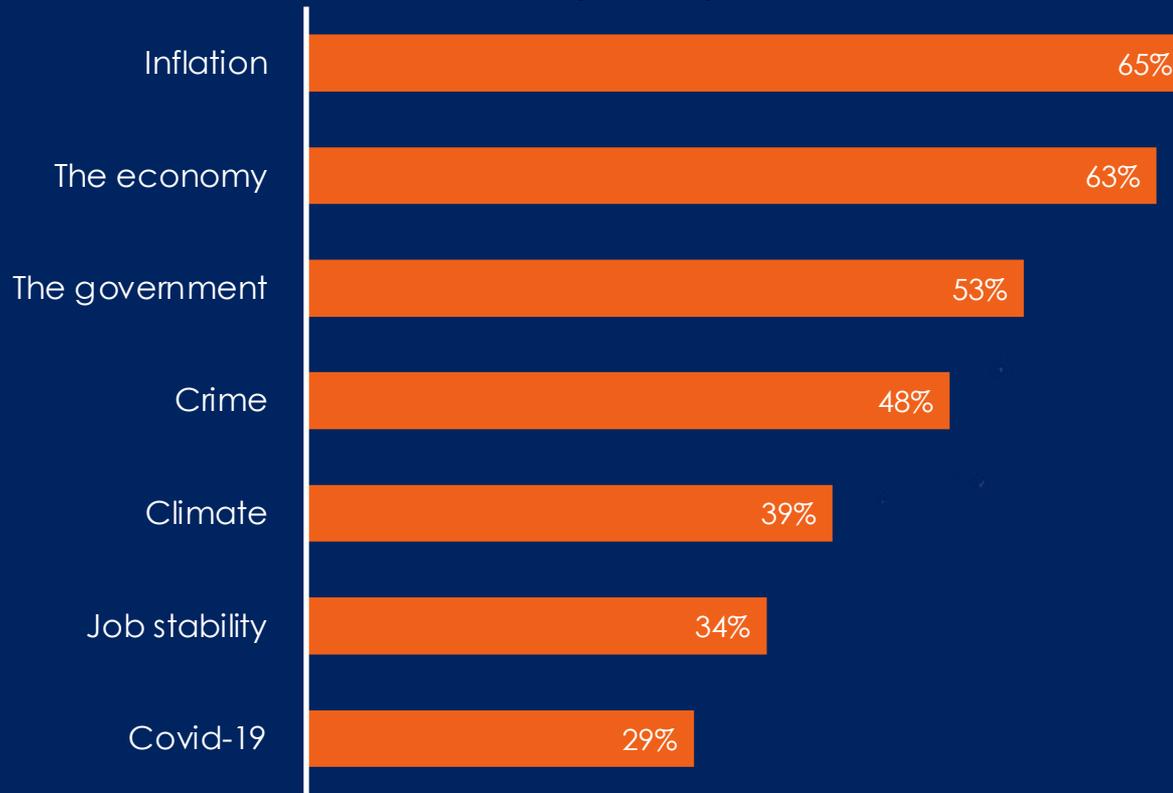
## Very/Moderately Optimistic



# Top Concerns Impacting Consumers

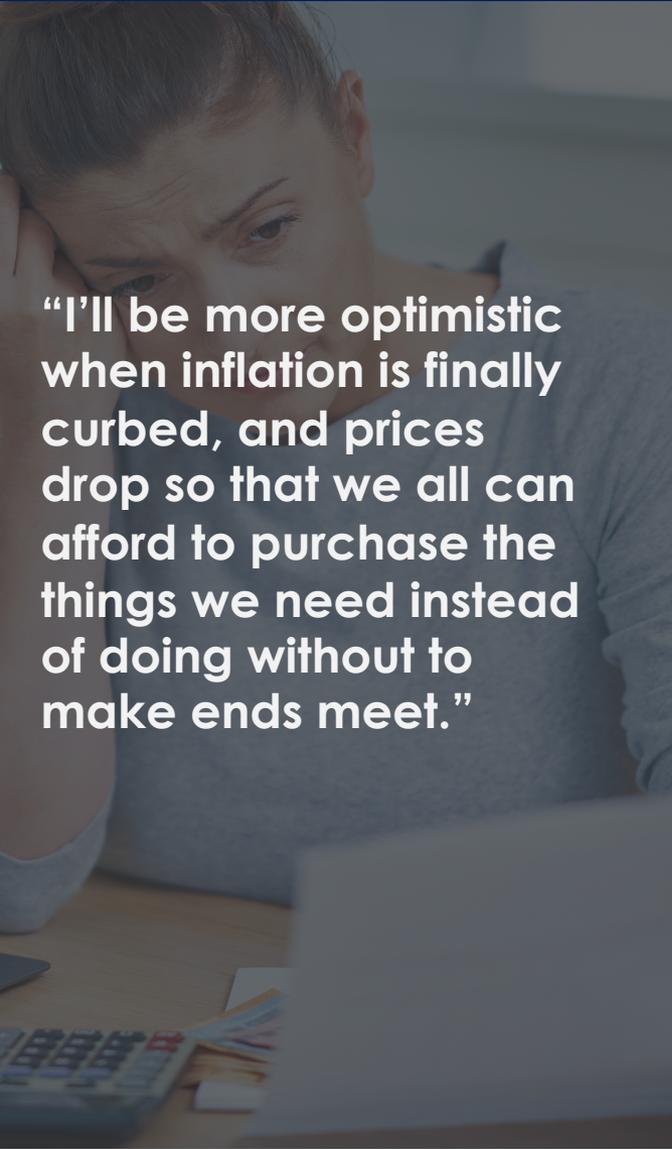
*Inflation and the economy are major issues for most Americans. Job stability and Covid-19 are not key worry areas.*

## Extremely/Very Concerned

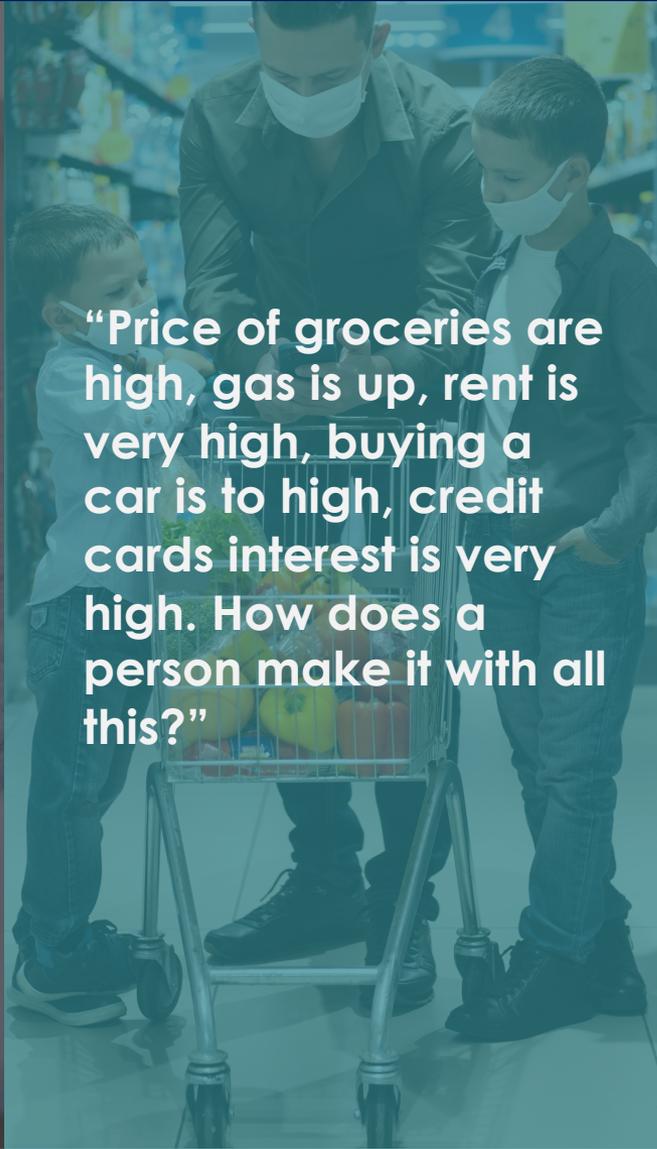


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# Optimism Will Grow As The Economy Improves



“I’ll be more optimistic when inflation is finally curbed, and prices drop so that we all can afford to purchase the things we need instead of doing without to make ends meet.”



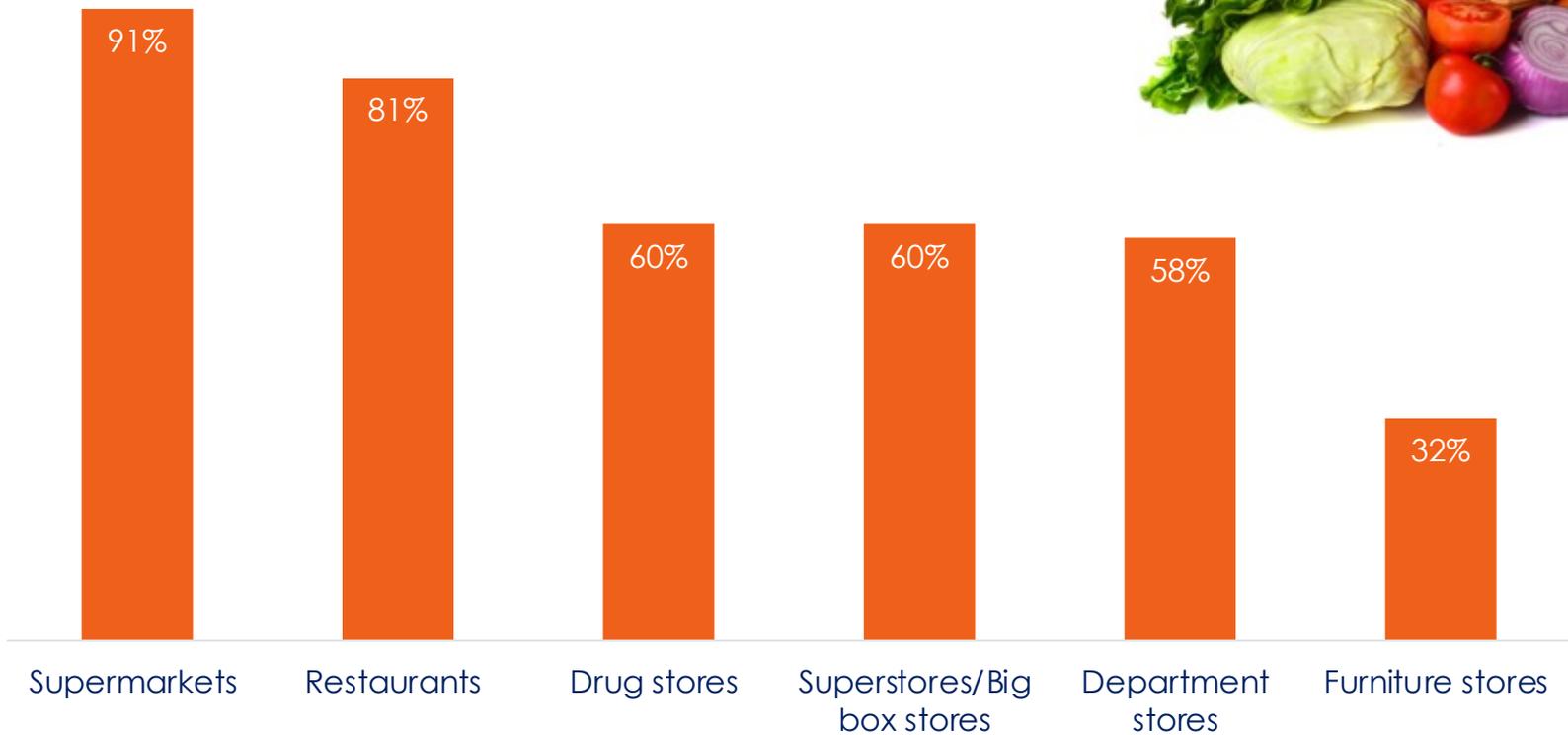
“Price of groceries are high, gas is up, rent is very high, buying a car is too high, credit cards interest is very high. How does a person make it with all this?”



“Personally, I am optimistic about my future. The future of the country leaves me in doubt. I think fixing the economy would be a first step of many this country needs for some recovery.”

# Price Increases

Americans see the impact of inflation at food establishments such as supermarkets and restaurants.



Consumers are in saving-mode; using multiple techniques to reduce their spend.



**More Budget Conscious in the Last 6 Months**

Top Ways They're More Budget Conscious

-  39% Eat at home
-  29% Less impulsive with purchases
-  22% Buy generic/store label brands
-  19% Use coupon
-  17% Less discretionary spending
-  15% Shop at discount store

Base: All Qualified Respondents (N=1,500)

Base: Slightly/More Budget Concern (n=1,051)

A person is riding a mountain bike on a rocky trail. They are wearing a blue and orange helmet, a black sleeveless shirt, black shorts, and a black backpack. The background shows a dense forest of green trees under a cloudy sky. The person is riding away from the camera, looking towards the horizon.

# Trends in the Outdoor Gear Industry

# Monthly Outdoor Gear Purchases

As more people return to indoor activities due to fewer concerns with Covid-19, outdoor gear purchase levels are dropping slightly.



**10%** of Americans are planning to purchase outdoor gear in the next 3 months

These groups are significantly more likely to plan to purchase outdoor gear...

**M** 13% Millennials

**♂** 13% Males

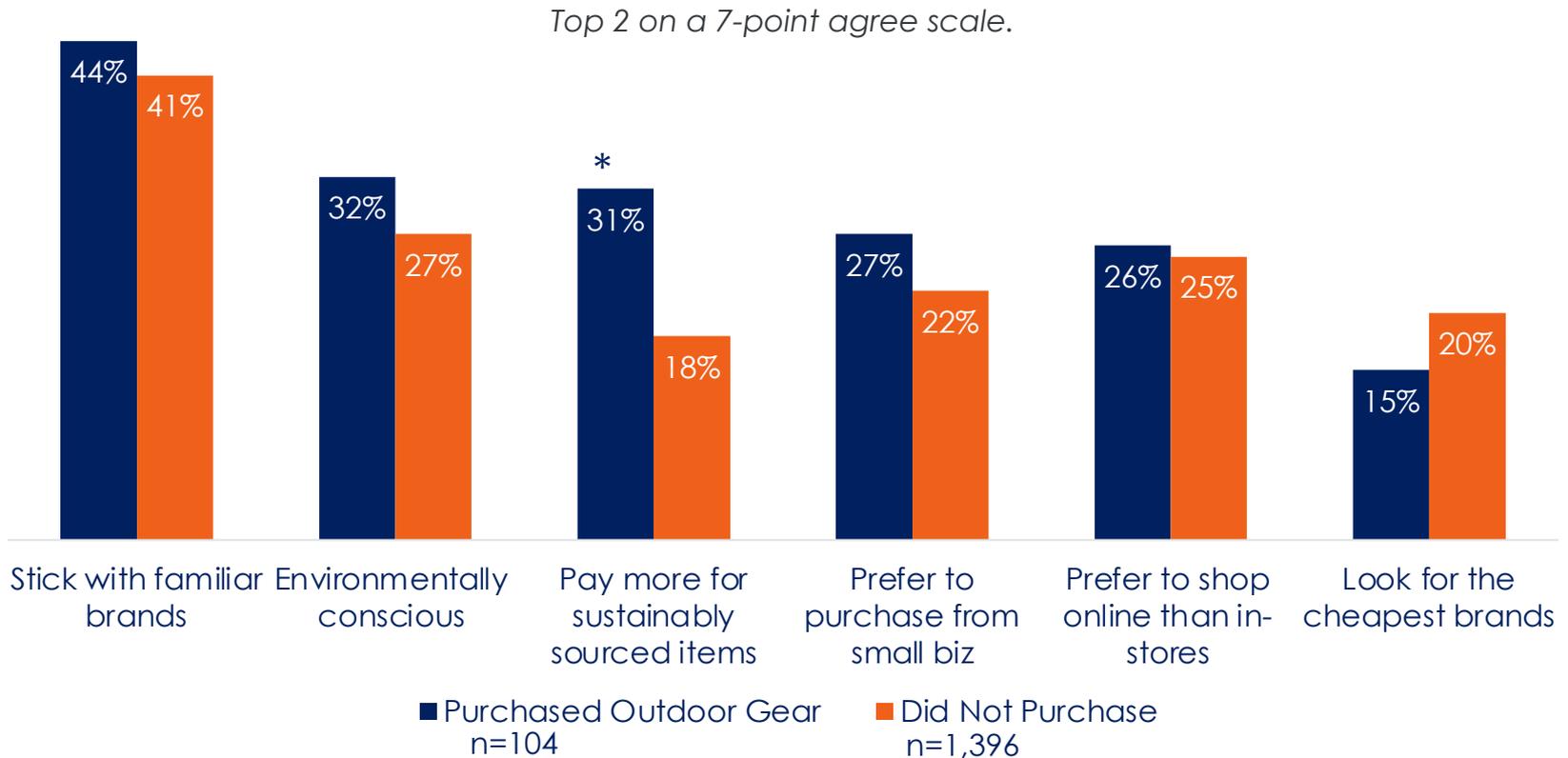
# Outdoor Gear Purchase Influences

Aside from price, quality and availability are top influences for selecting outdoor gear. Added shopping experiences, such as next day delivery or customer service are less considered for these purchases



# Bought Outdoor Gear: Purchasing Attitudes

Brand familiarity is a key decision factor for those buying outdoor gear. They are also more willing to pay for sustainably source items.



\*Significantly different

# Impacts on the Outdoor Gear Industry

Almost a tenth of consumers say that lack of inventory has impacted their purchasing decision.



8%

Feel lack of inventory  
has most affected  
outdoor gear  
purchasing decisions



3%

Feel customer service/staffing  
has most affected  
outdoor gear  
purchasing decisions



# Purchase Influencers Index

## *Industry Comparison*



# Influence of *In-Store* *Availability* on Purchase Decision *Industry Comparison*

## Index

1.	Alcohol	18%
2.	Toys	11%
3.	Outdoor gear	10%
4.	Apparel	10%
5.	Fitness gear	8%
6.	Beauty/Skincare products	8%
7.	Major Appliances	0%
8.	Electronics	-2%
9.	CBD products	-16%
10.	Fine jewelry/watches	-16%
11.	Automobiles	-31%

*\*Index is calculated by dividing the industry percent by the average and then deducting 100%*



# Influence of *Available Inventory* on Purchase Decision *Industry Comparison*

## Index

1.	<b>Airlines</b>	19%
2.	<b>Apparel</b>	16%
3.	<b>Outdoor gear</b>	16%
4.	<b>Electronics</b>	14%
5.	<b>Toys</b>	6%
6.	<b>CBD products</b>	-4%
7.	<b>Beauty/Skincare products</b>	-5%
8.	<b>Fine jewelry/watches</b>	-6%
9.	<b>Alcohol</b>	-8%
10	<b>Hotels</b>	-8%
11.	<b>Major Appliances</b>	-10%
12.	<b>Automobiles</b>	-14%
13.	<b>Fitness gear</b>	-15%

\*Index is calculated by dividing the industry percent by the average and then deducting 100%



# Influence of *Price* on Purchase Decision

## Industry Comparison

### Index

1.	<b>Hotels</b>	18%
2.	<b>Airlines</b>	17%
3.	<b>Toys</b>	8%
4.	<b>Apparel</b>	8%
5.	<b>Outdoor gear</b>	7%
6.	<b>Beauty/Skincare products</b>	3%
7.	<b>Major Appliances</b>	1%
8.	<b>Electronics</b>	-4%
9.	<b>Fitness gear</b>	-5%
10.	<b>Alcohol</b>	-11%
11.	<b>Automobiles</b>	-12%
12.	<b>Fine jewelry/watches</b>	-12%
13.	<b>CBD products</b>	-17%

*\*Index is calculated by dividing the industry percent by the average and then deducting 100%*



# Influence of *Quality* on Purchase Decision Industry Comparison

## Index

1.	Hotels	37%
2.	Fine jewelry/watches	20%
3.	Fitness gear	17%
4.	Electronics	10%
5.	Outdoor gear	7%
6.	Apparel	6%
7.	Beauty/Skincare products	0%
8.	Toys	-1%
9.	Major Appliances	-2%
10.	CBD products	-5%
11.	Automobiles	-22%
12.	Alcohol	-29%
13.	Airlines	-38%

\*Index is calculated by dividing the industry percent by the average and then deducting 100%



# Influence of *Next Day Delivery* on Purchase Decision *Industry Comparison*

## Index

1. Major Appliances	66%
2. Electronics	31%
3. Automobiles	19%
4. Fitness gear	17%
5. Fine jewelry/watches	14%
6. Outdoor gear	5%
7. Toys	-1%
8. Apparel	-22%
9. CBD products	-26%
10. Beauty/Skincare products	-37%
11. Alcohol	-65%

*\*Index is calculated by dividing the industry percent by the average and then deducting 100%*



# Influence of *Customer Service* on Purchase Decision *Industry Comparison*

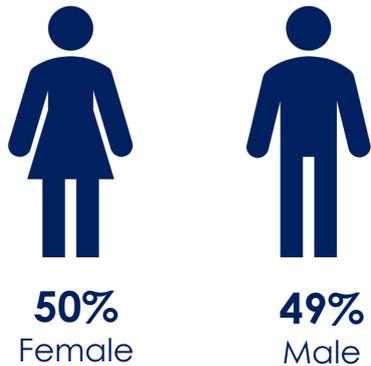
## Index

1.	Airlines	51%
2.	Fitness gear	50%
3.	Hotels	47%
4.	Electronics	17%
5.	Fine jewelry/watches	12%
6.	Major Appliances	11%
7.	CBD products	4%
8.	Automobiles	3%
9.	Outdoor gear	-20%
10	Apparel	-30%
11.	Toys	-41%
12.	Beauty/Skincare products	-43%
13.	Alcohol	-61%

*\*Index is calculated by dividing the industry percent by the average and then deducting 100%*

# Respondent Overview

## Gender



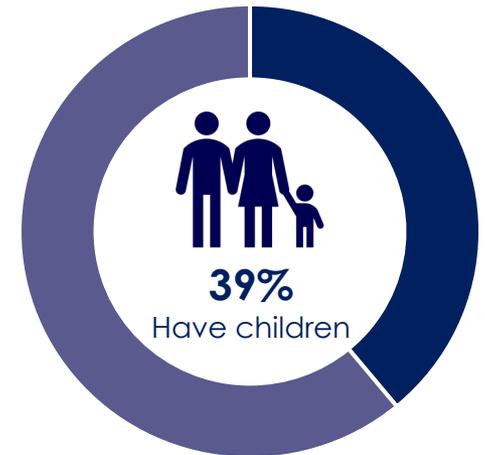
\*1% other identity

## Generation

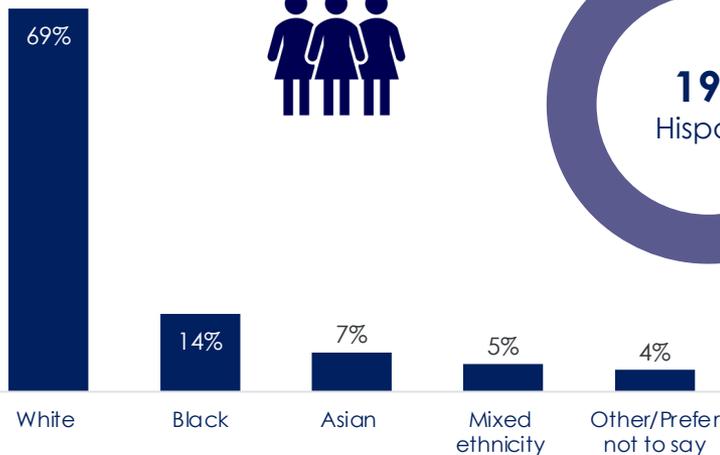
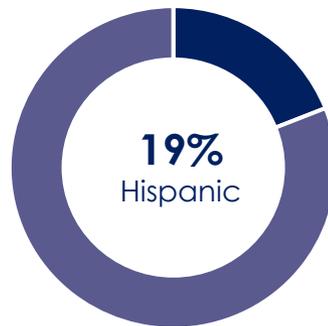
42 years old  
Average Age



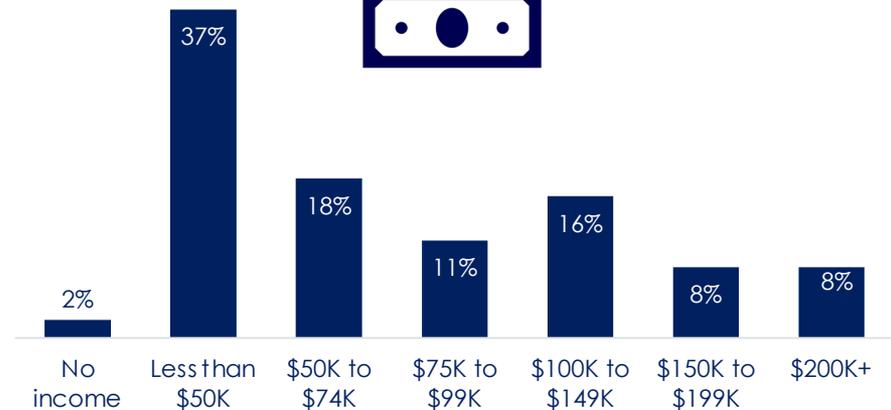
## Parental Status



## Ethnicity



## Household Income



# About Provoke Insights



Founded on the premise that research should better align with marketers' needs, Provoke Insights empowers brands to navigate through today's cluttered advertising space. This full-service market research firm solely focuses on research for **branding, advertising, and content marketing** initiatives.

At Provoke Insights, you work with a research expert who is also a seasoned brand strategist; this ensures that questions are deeply explored, and insights are cultivated and capitalized. We develop insights from the data to help guide growth for your company's vision.

For more information or press inquiries, reach out to [info@provokeinsights.com](mailto:info@provokeinsights.com).