

A photograph of four hikers from behind, walking through a forest. They are wearing large backpacks in various colors: dark blue, light blue, grey, and orange. The hiker on the far right has a rolled-up mat attached to their pack. The background is a dense forest with sunlight filtering through the trees.

provoke
insights

The Outdoors & Backpacks:
Consumer Trends

Fall 2023 | Winter 2024

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.

Provoke Insights Fall 2023 | Winter 2024 Wave

Since 2020, several trends have impacted consumer behaviors, from COVID to inflation. As a result, it's important to track consumers brand loyalty as well as their preferences for shopping online vs. in-store. As consumers are becoming more budget conscious, it is essential to understand what products they are purchasing.

Provoke Insights developed 17 industry specific decks; this deck focuses on the outdoor gear industry.



Methodology

Provoke Insights conducted a 15-minute survey among 1,502 Americans between the ages of 21 and 65. The study was in-field in September 2023.

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

Results based on this sample have a maximum margin of sampling error $\pm 2.5\%$ 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, notably at superstores and department stores. As a result, budgets are tightening.



Backpack Purchasing Trends

Two in ten Americans are purchasing backpacks, most commonly in-store. Parents, millennials, and members of the LGBTQ+ are the most likely groups shopping for these items.

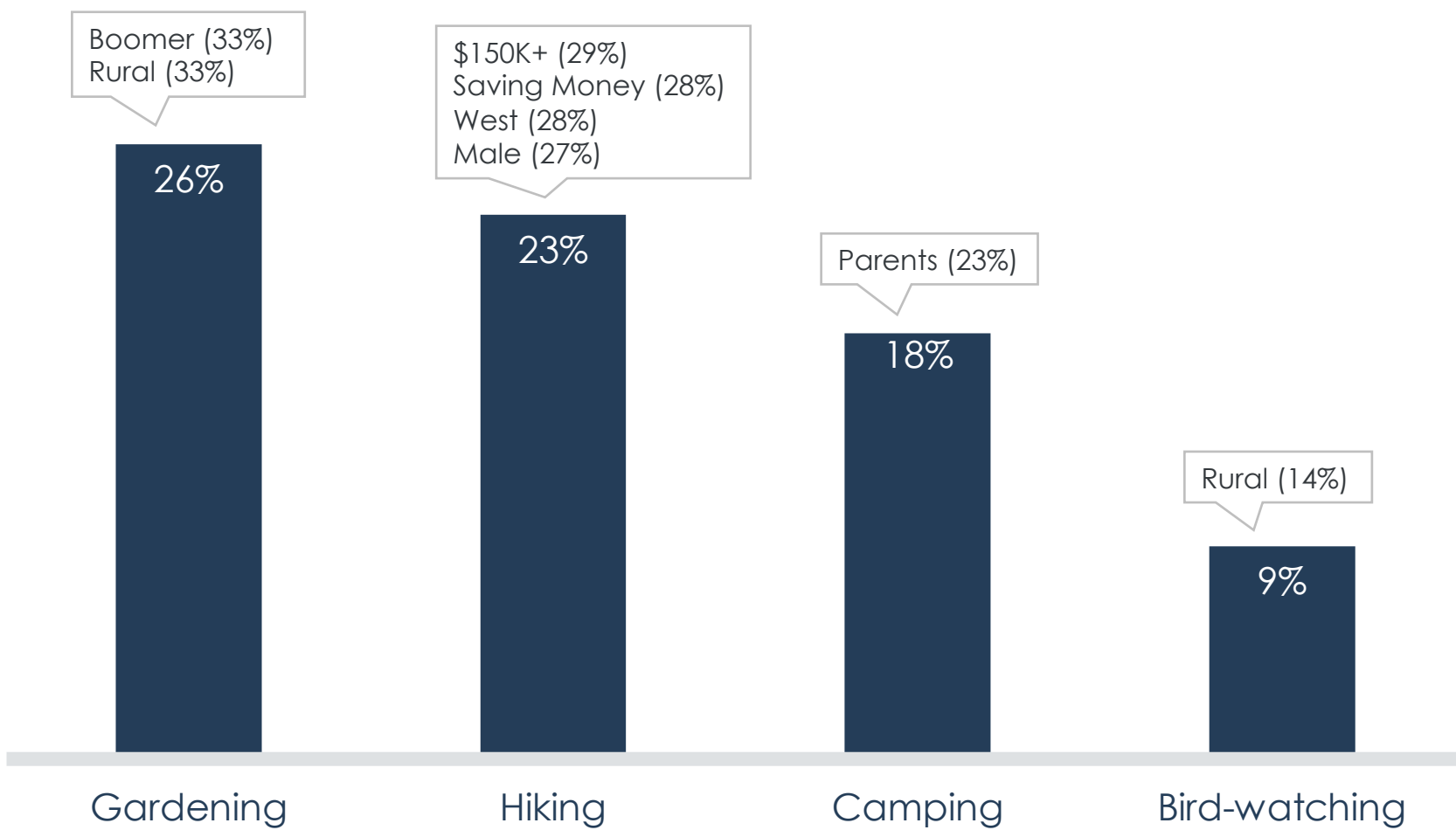
These shoppers are open to purchasing new brands as only a little over a one-third of those buying backpacks are loyal to brands. Sustainability is a factor when shopping, as most backpack purchasers are willing to pay up to 24% more for sustainably sourced items. Additionally, brands that do not align with these shoppers' values will not be considered for future purchases.

Outdoor & Backpack Trends



American Consumers Are Active Outdoors

One-quarter of Americas regularly participate in outdoor activities like gardening and hiking.





20%
of Americans have
purchased backpacks in
the last month

Groups Significantly More Likely to Purchase Backpacks



Parents (33%)



Millennial (29%)



LGBTQ+ (27%)



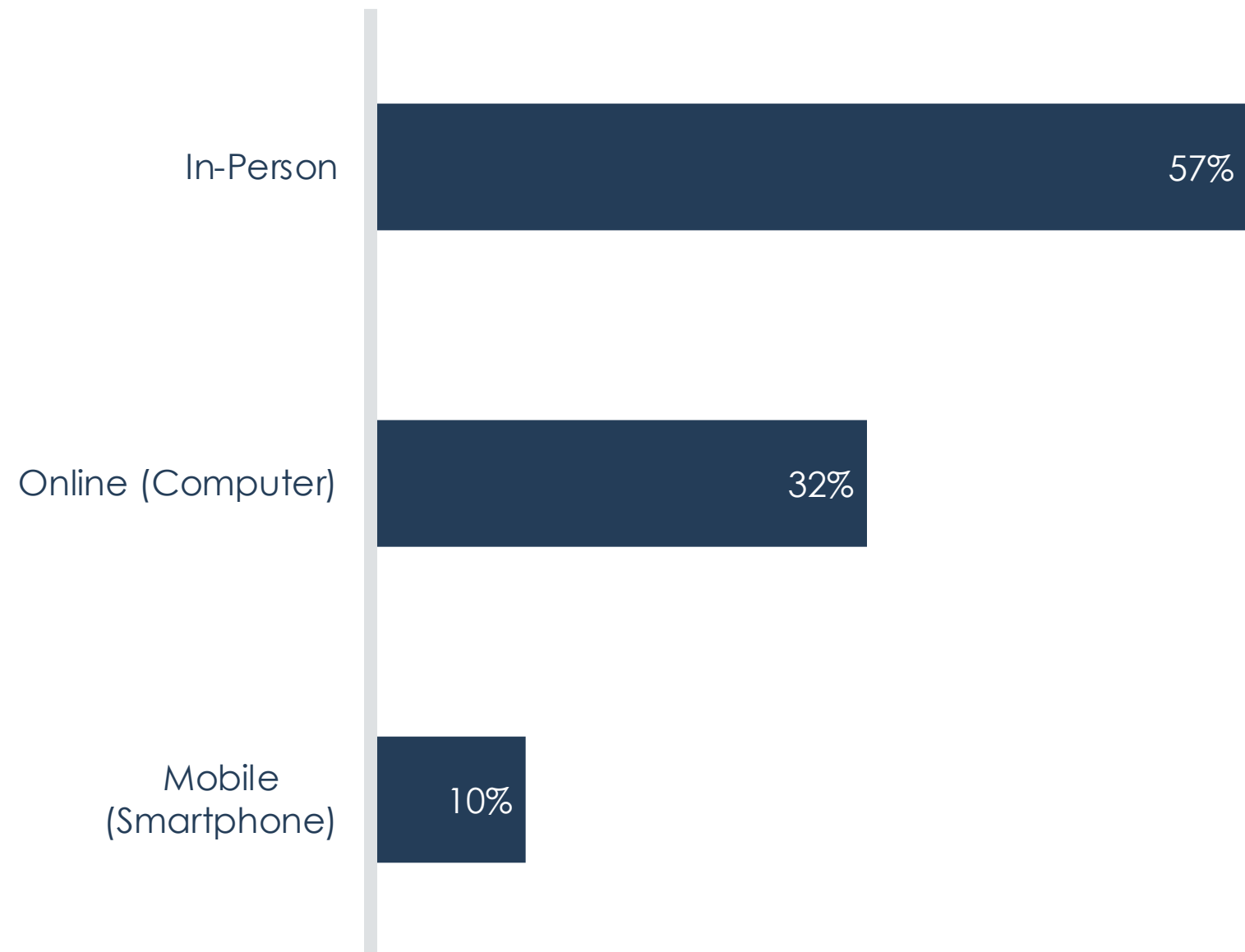
Urban (27%)



Hispanic (26%)

Consumers Primarily Purchase Backpacks In-Store

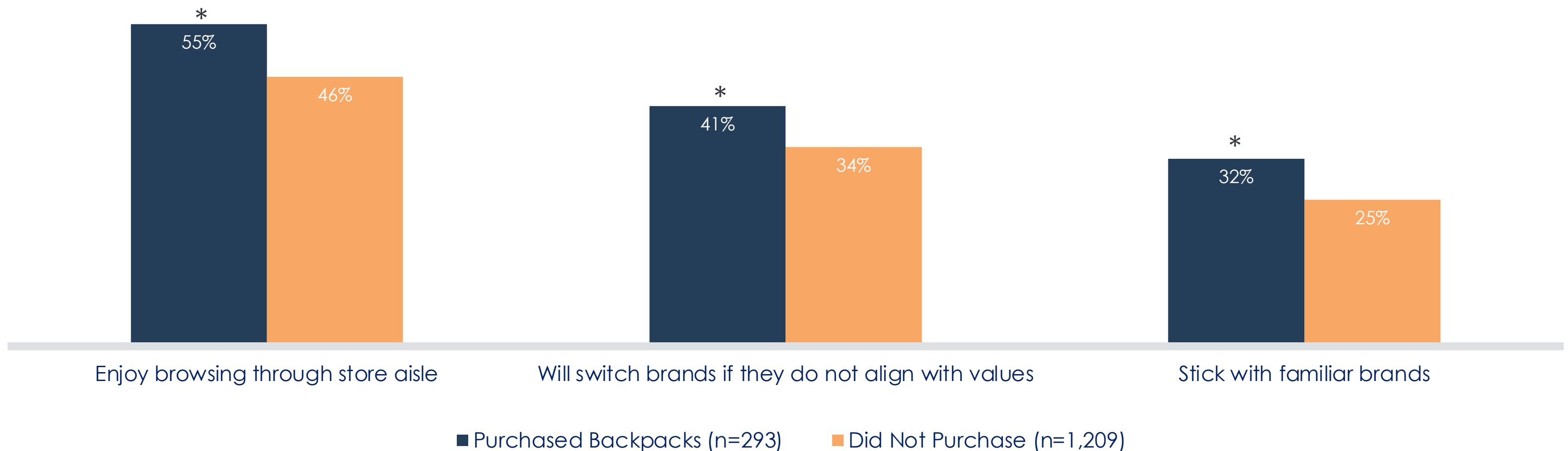
More than half of consumers opt to visit a physical store when buying backpacks.



Shopping Habits

Backpack shoppers enjoy exploring store aisles, many tend to remain loyal to familiar brands. However, these shoppers are more inclined to switch brands that do not align with their values.

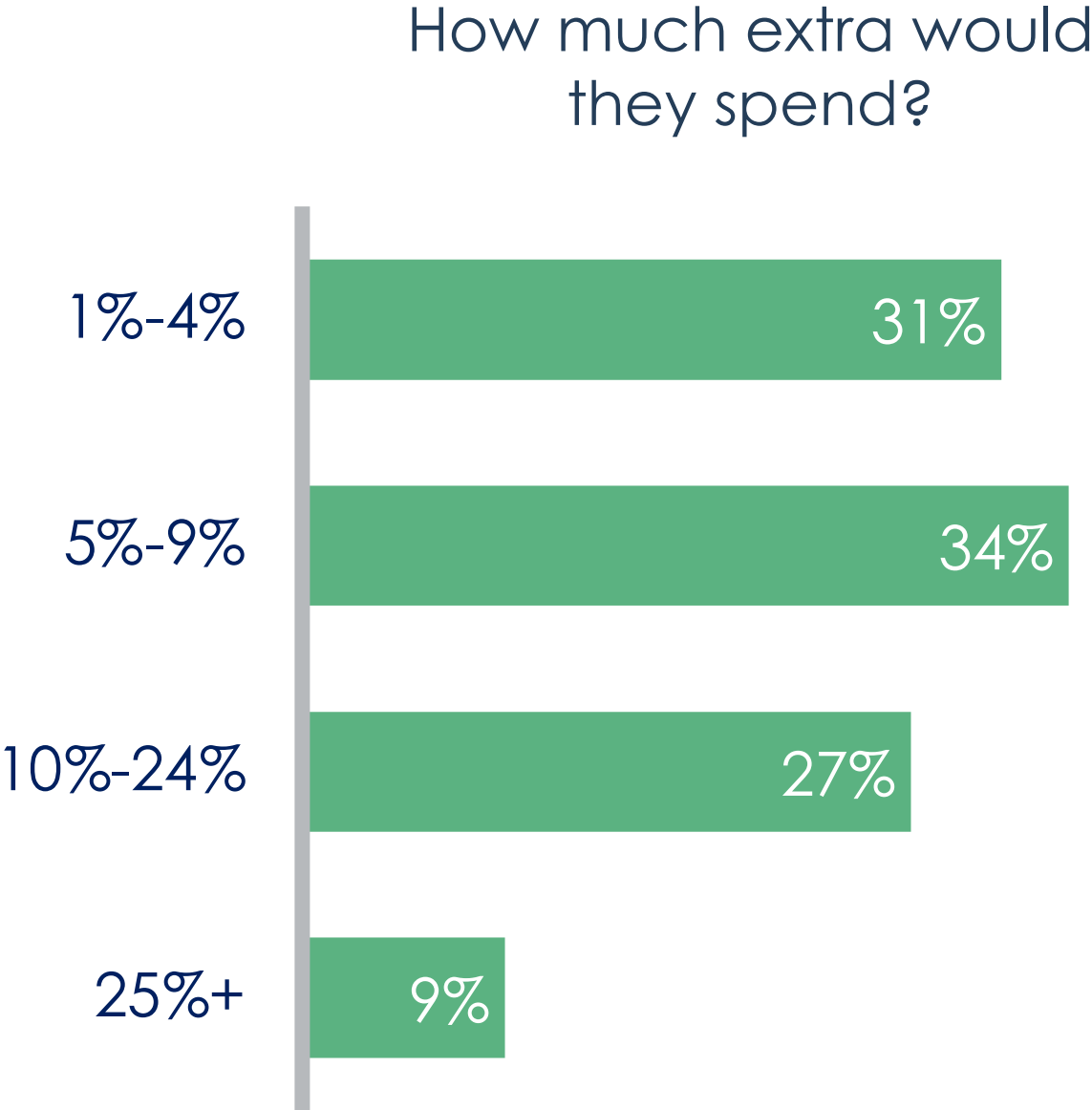
Top 2 on a 7-Point Agree Scale



* Indicates statistical significance

Sustainability

Those who have purchased backpacks are open to paying a premium for sustainably sourced options. Nearly nine in ten of these shoppers are prepared to invest up to 24% more for such items.



Base: Bought a backpack in last month and will pay more for sustainable item (n=244)

Brand Loyalty

Those most loyal to a backpack brand are in a good financial situation.

Top 2 on a 5-Point Loyalty Scale

36% of

backpack purchasers are loyal to the last brand they purchased from

Group Significantly More Likely to be Loyal to Backpack Brands



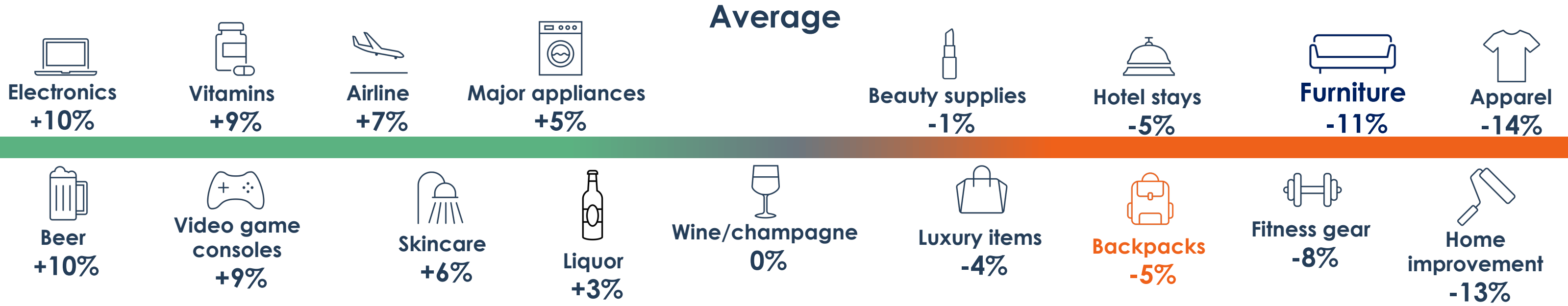
Good Financial Situation (45%)

Brand Loyalty Index

Compared to other industries, consumers are less loyal to backpack brands.

Most Loyal

Least Loyal



*Seventeen industries were assessed to determine how loyal consumers are to specific industry brands. Index created by percent who stated they mostly purchase this brand or only purchase this brand.



Most Influential Media Channels

Out of the 14 channels analyzed, Youtube ads leave the strongest impression on backpack buyers. It is also the top platform for brand discovery. Facebook is recognized for its notably intrusive ads among this audience.



22%

most memorable

find ads on **YouTube** to be the



19%

about a brand in an ad on **YouTube**

are **motivated to learn more**



19%

the most intrusive

find ads on **Facebook** to be

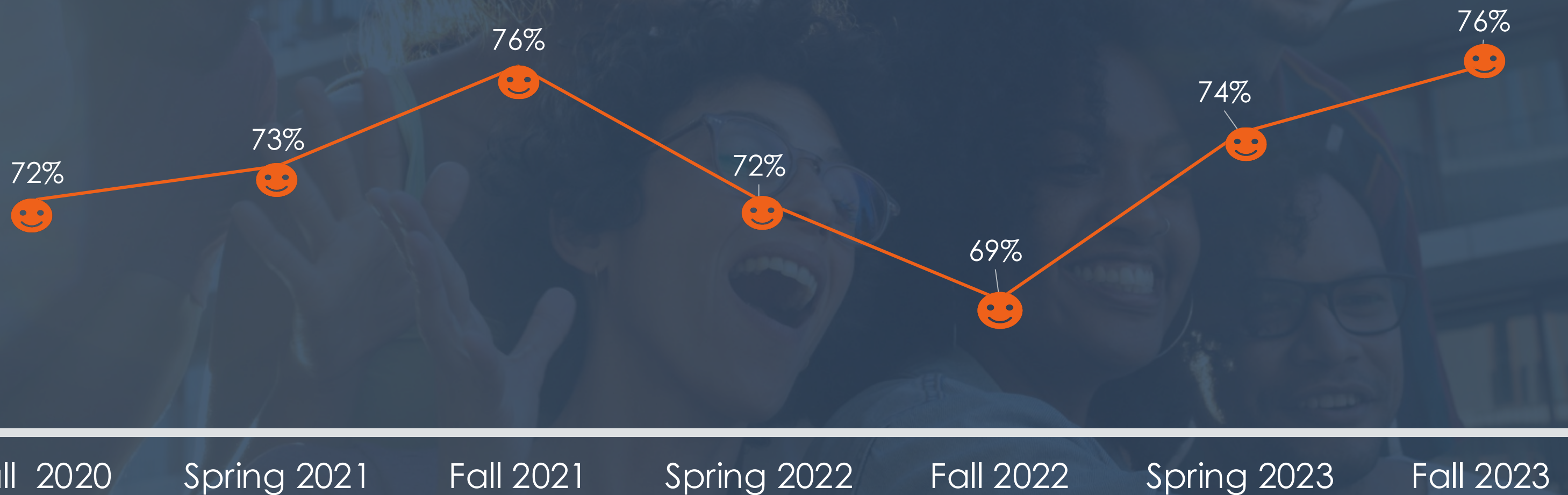


How is the Economy Impacting Consumers?

Consumer Optimism

Optimism levels are at the highest levels since Fall 2020.

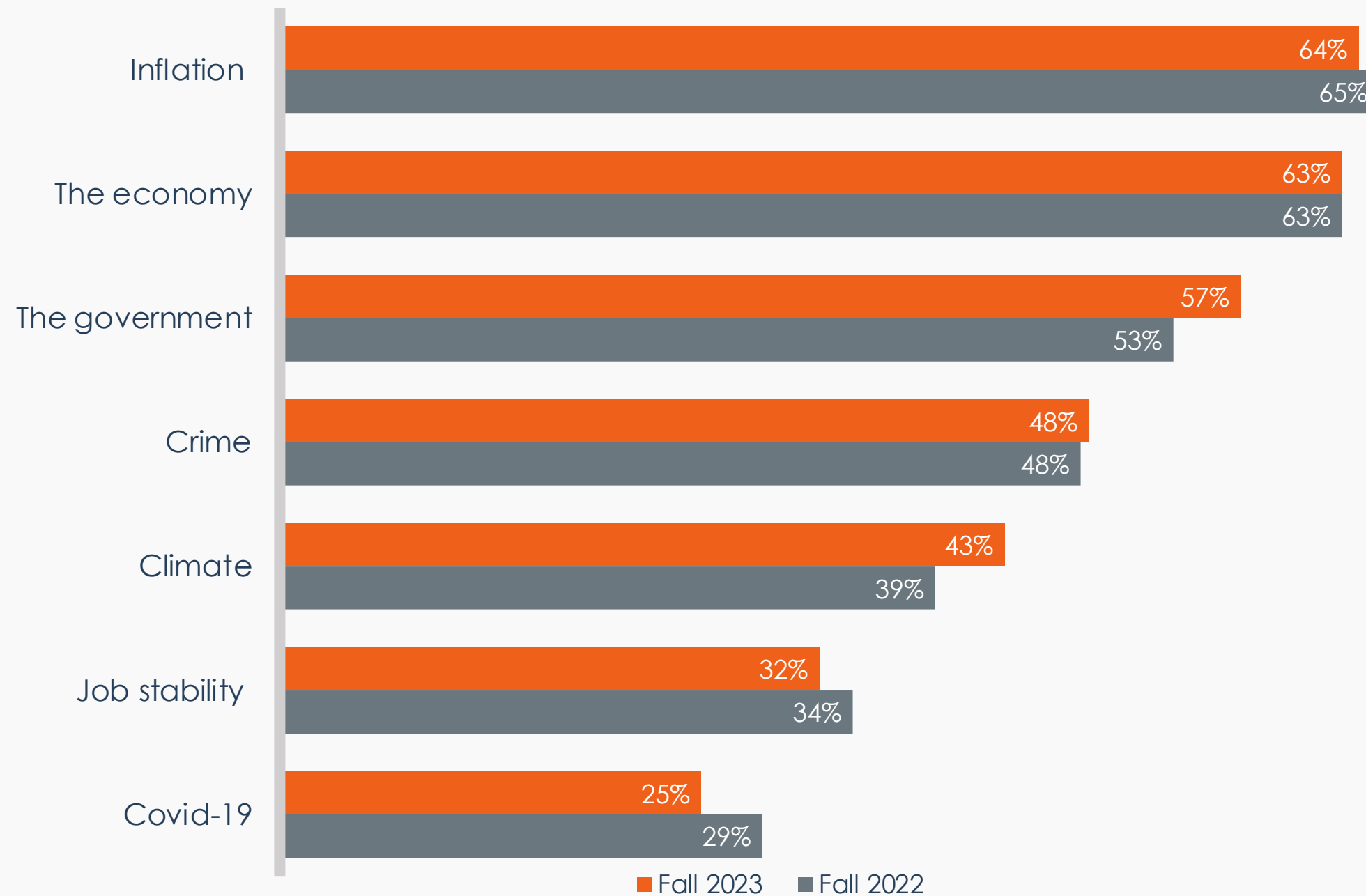
Optimism
Top 2 box on a 4-point scale



Top Concerns Impacting Consumers

Inflation and the economy are still the leading issues impacting Americans. Climate concerns and concerns about the government have increased in the past year.

Concern
(Top 2 box on a 5-point scale)










64%

of Americans are concerned inflation will impact them personally

Groups Significantly More Likely to be Concerned with Inflation








-  Going Further into debt (76%)
-  Republican (70%)
-  Budget conscious (70%)
-  HHI Under \$75K (70%)
-  Rural (69%)



63%

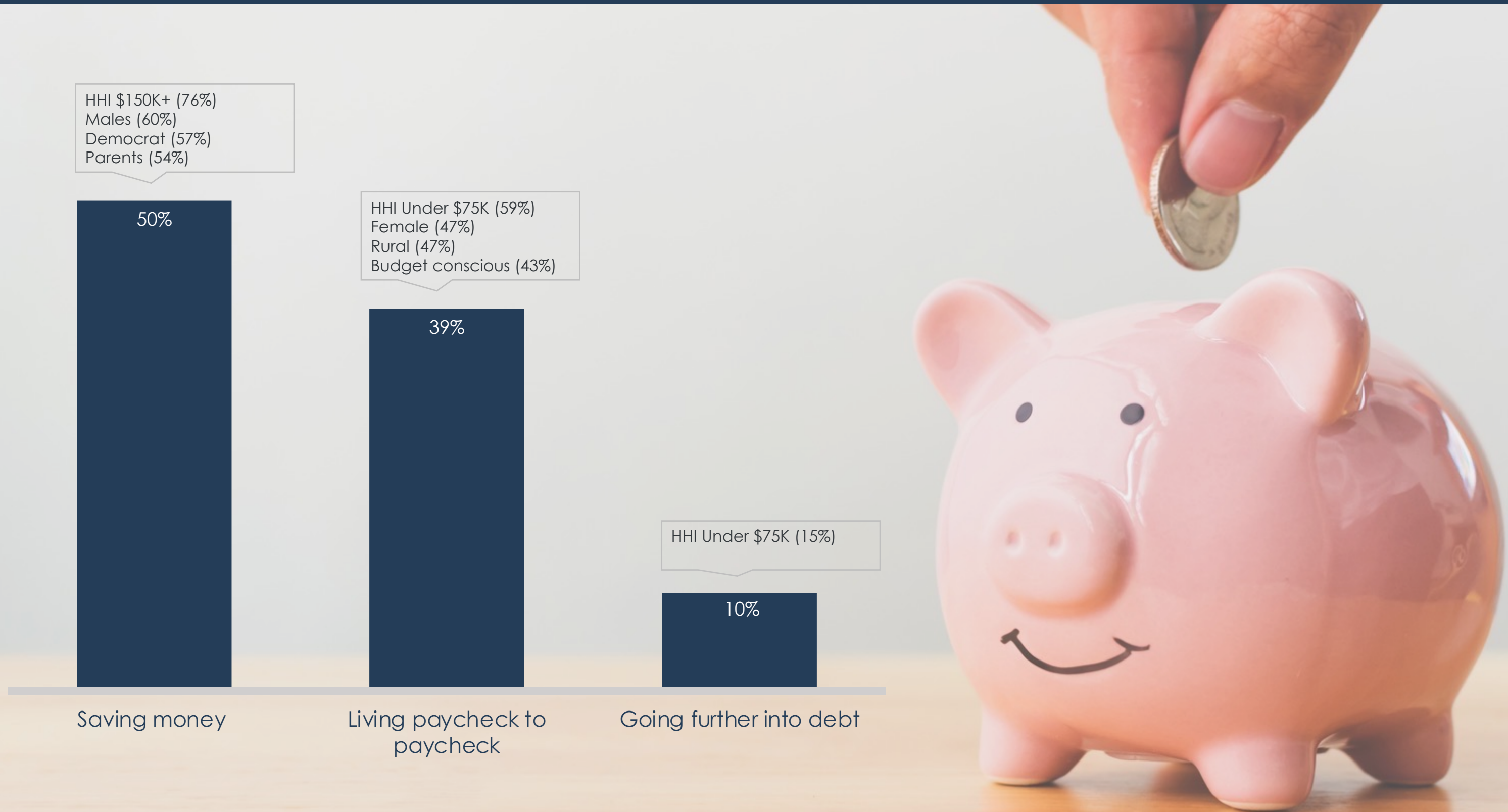
of Americans are concerned the economy will impact them personally

Groups Significantly More Likely to be Concerned with The Economy

-  Going Further into debt (73%)
-  Republican (71%)
-  HHI Under \$75K (69%)
-  Budget conscious (68%)
-  Rural (68%)
-  Female (68%)
-  Millennials (67%)

Saving Money is Difficult in this Economy

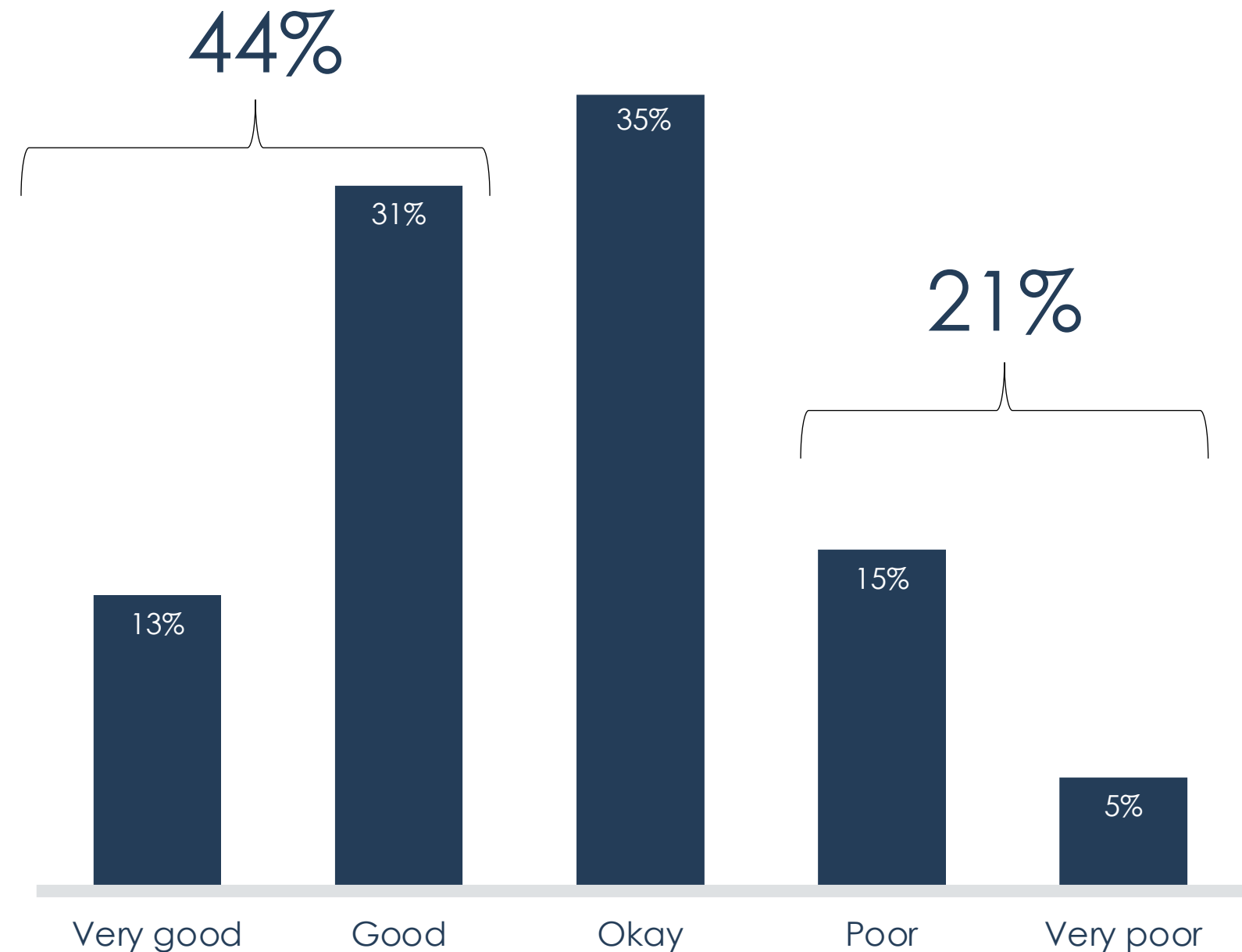
Only half of Americans are actively saving money. A tenth are going further into debt.



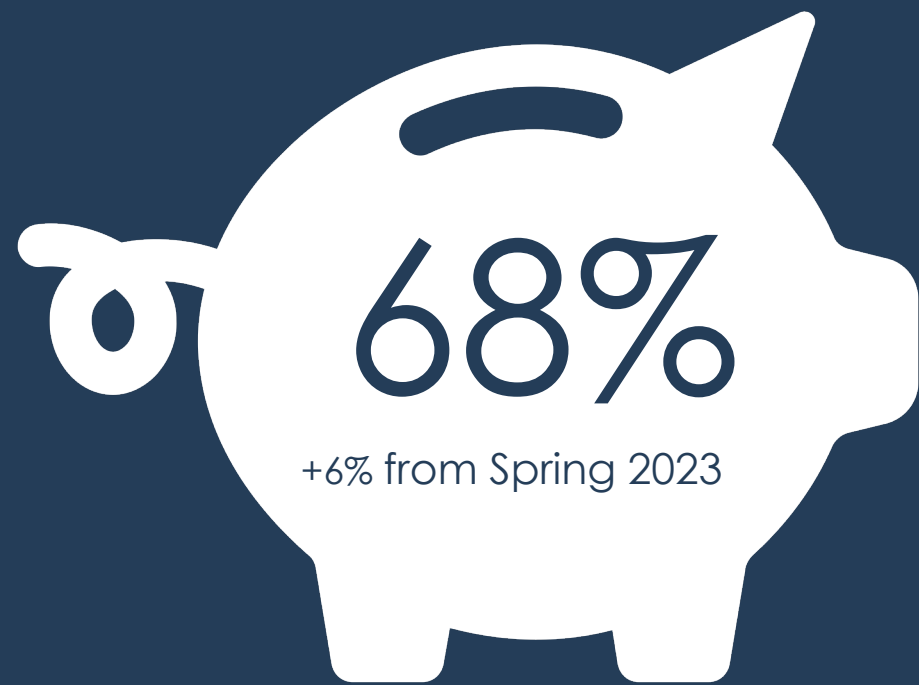


Most Consumers are Doing “Okay” Financially

Less than half see themselves in a financially good situation.



As Inflation and the Economy are a Top Concern, Consumers are Becoming More Budget Conscious



**More Budget
Conscious**

Who is Significantly More Likely to Be Budget Conscious



78% LGBTQIA+



76% Going Into Debt



74% Living Paycheck to Paycheck

Consumers Are in Budget Mode When It Comes to Spending

Spending Less To Save More

"I refuse to pay more than I must. This means I drive less, eat less, and am less likely to go to recreational activities."

"The only thing I consistently spend money on are bills, I put everything else towards my savings."

"I only spend a certain amount of my check each month and save the rest."

"I have been spending less because I want to increase my retirement savings."

Inflation Concerns

"I used to shop freely whenever I wanted too. Now I have to plan where I can go. Even then I have to watch prices. Sad world!"

"Even though my spending habits have stayed the same, I am still not happy about prices increasing time and time again."

"Inflation is on the rise again so therefore I'm spending much more than I was before on gas and groceries."

Avoiding Frivolous Spending

"My spending habits have become stricter. I've had to cut back on nonessential purchases like streaming subscriptions, Starbucks trips, etc."

"I use coupons and try to watch for sales and deals so I'm not buying full price."

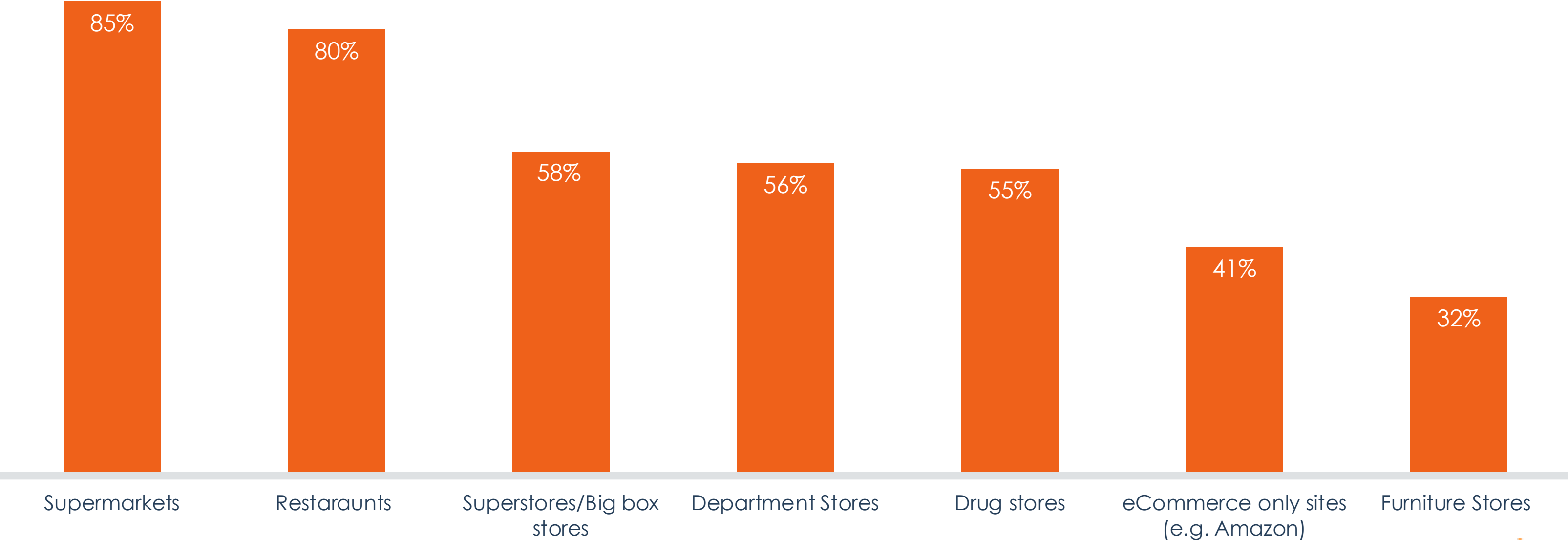
"I am shopping more wisely now, always looking for deals, discounts and price cuts."

"I am only buying essentials and generic brands to make ends meet."

Price Increases

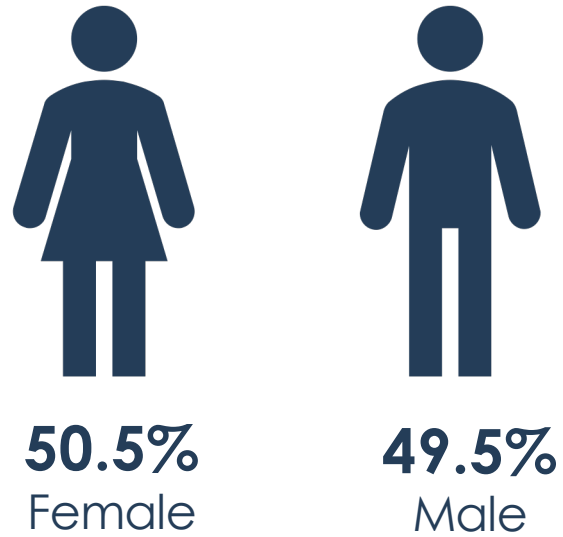


Americans see the impact of inflation, especially at food establishments such as supermarkets and restaurants.



Respondent Profile

Gender



*<1% other identity

Generation

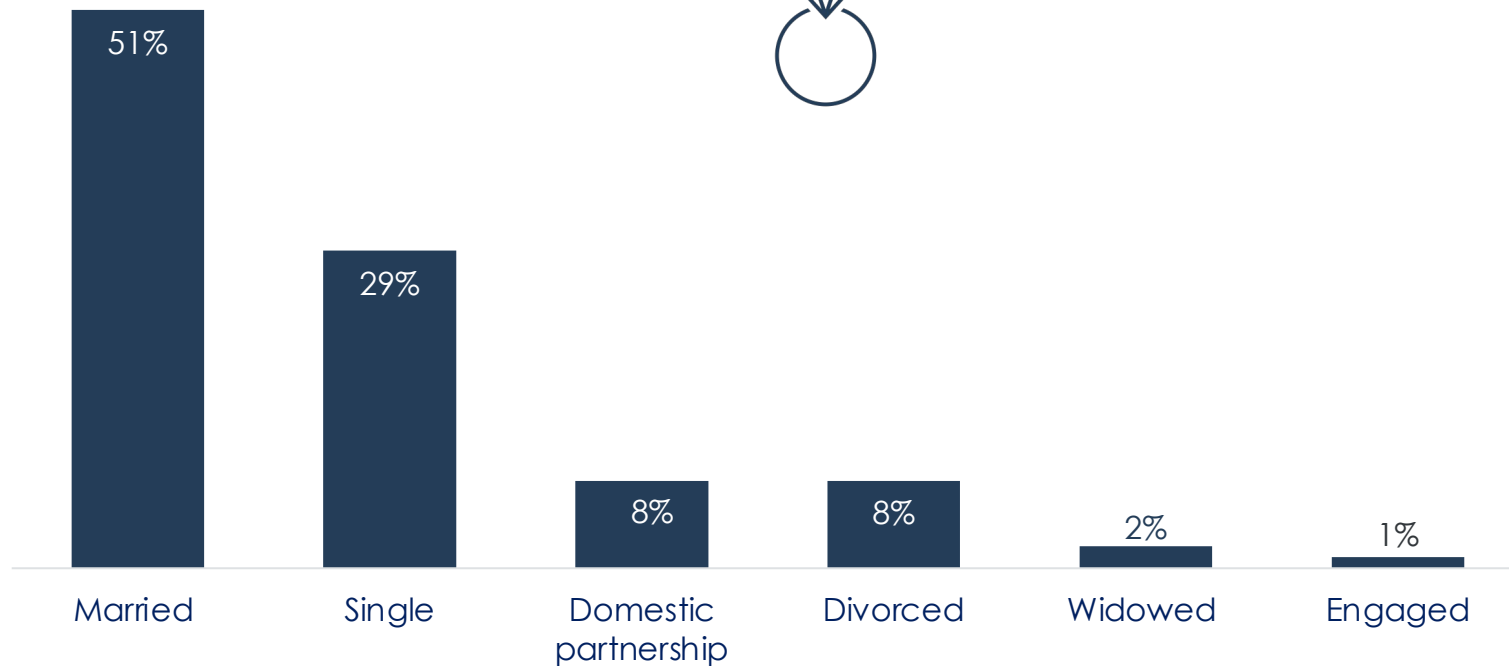


Parental Status

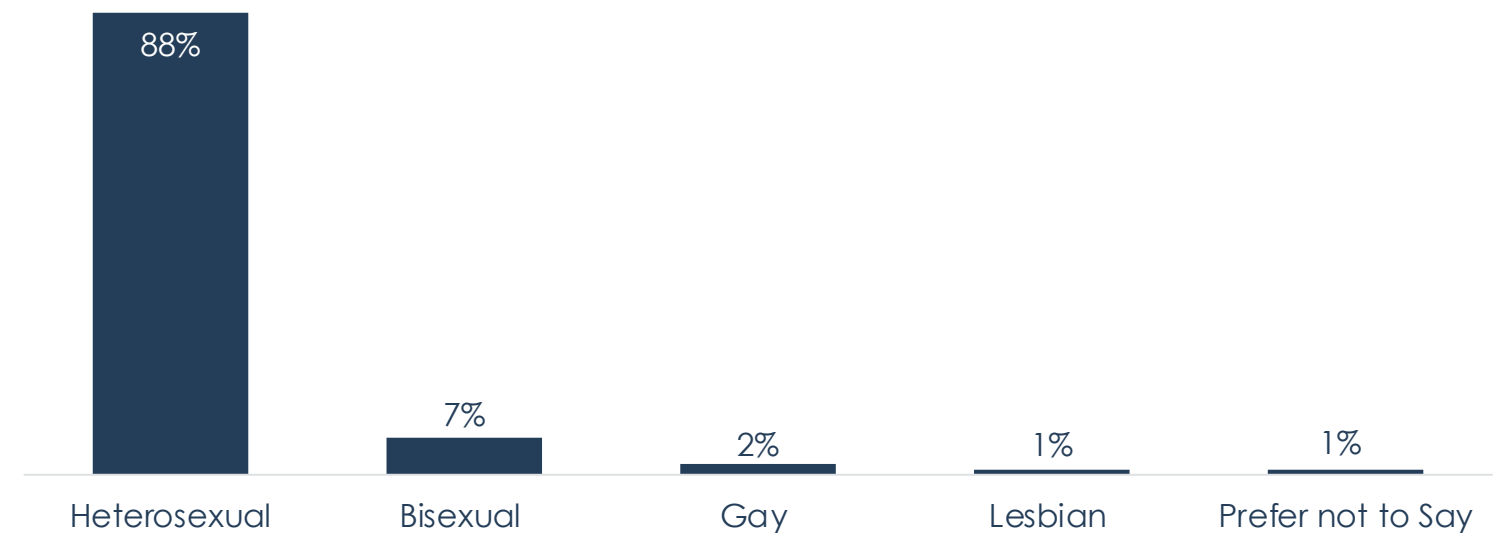


40%
Have children

Marriage Status

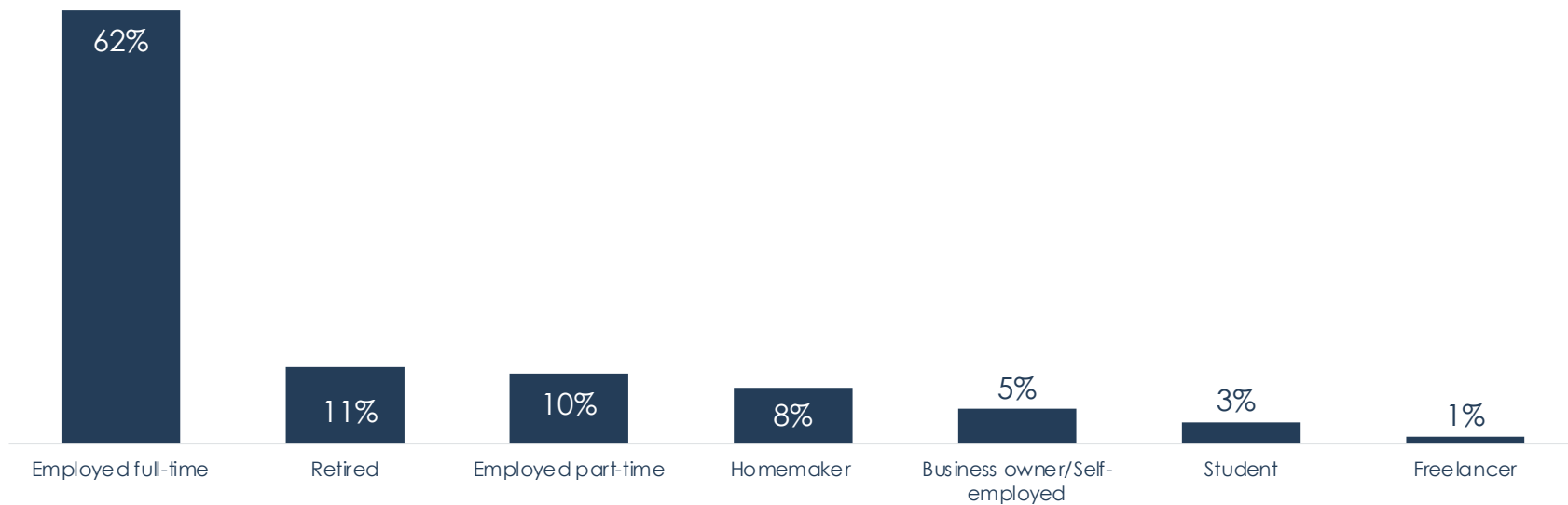


Sexual Orientation

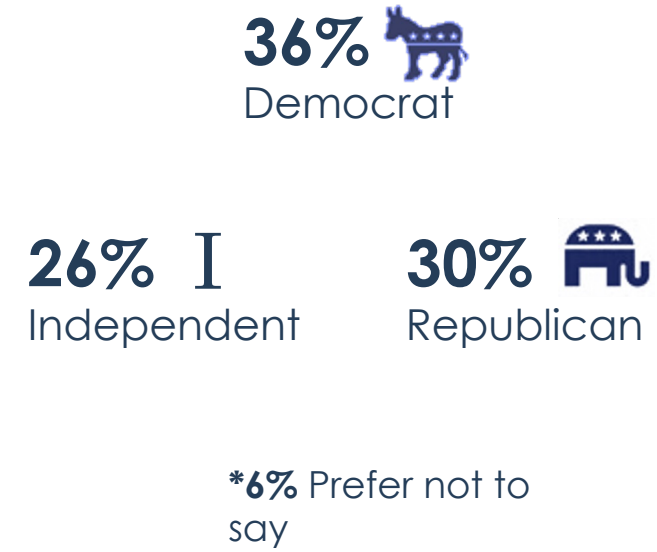


Respondent Profile

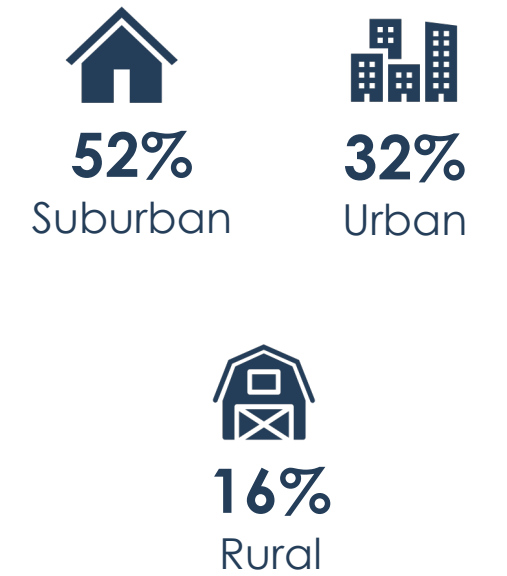
Employment Status



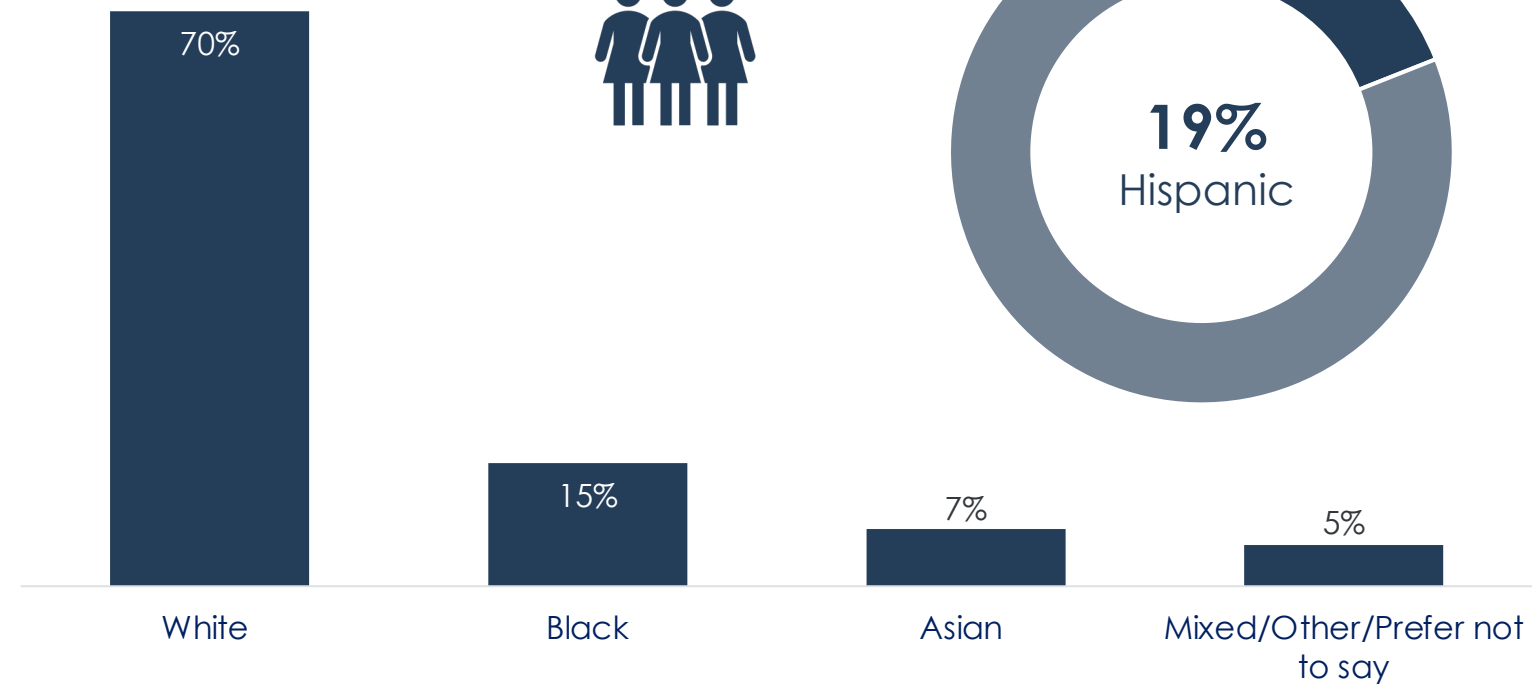
Political Party



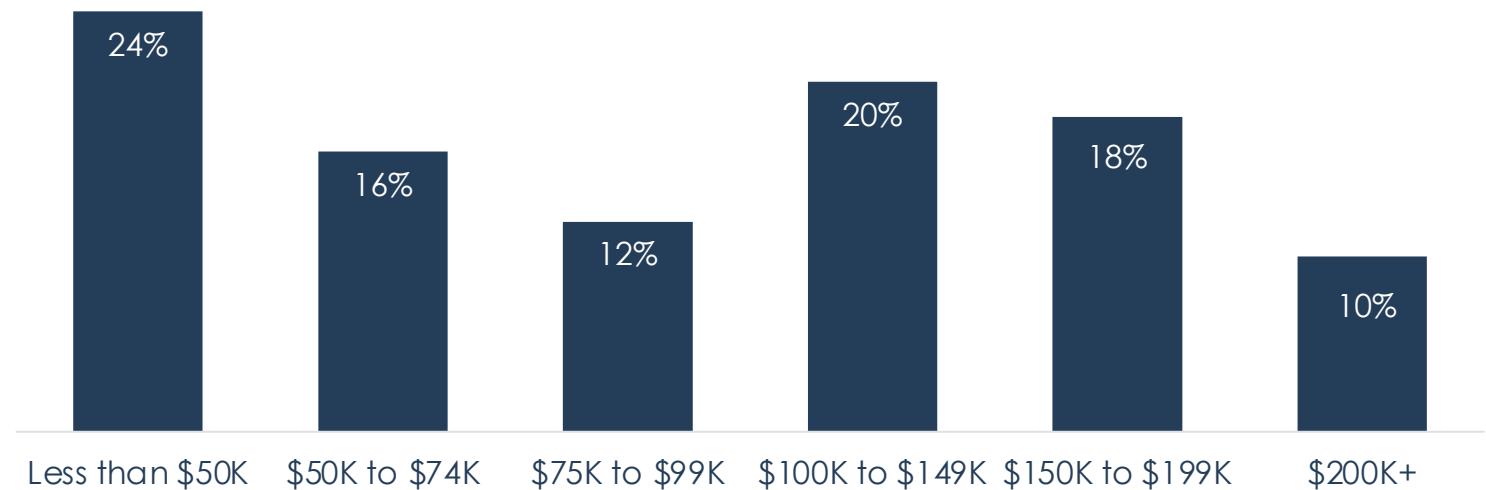
Area



Ethnicity



Household Income



About Provoke Insights



Founded on the premise that research should better align with marketers' needs, Provoke Insights' innovative approach empowers brands to navigate today's marketing verticals. As a builder of brands, the firm focuses on research for consumer needs, market opportunities, and branding.

Provoke Insights conducts traditional market research projects and develops agile, innovative initiatives to meet the quick and varied needs of today's ever-changing market.

Provoke Insights stands out from other full-service market research firms as we solely specialize in branding and advertising initiatives. Our staff consists of researchers that are also seasoned brand & media strategists.

For more information or press inquiries, reach out to info@provokeinsights.com.

