

Active Outdoor Enthusiasts - US - November 2019

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Dedicated participants define activities
- Tapping into social circles for information
- Linking outdoor identity to activism
- Difficult to completely disconnect from the world

Consumers have a tendency to gravitate toward the familiar, making family, friends and even influencers important groups to break people out of their regular routines and help them adopt new activities. Even though most outdoor enthusiasts stick to only a few activities, they are growing the market through frequent participation and an invigorated sense of activism.



The outdoor recreation market is populated by a large, stable group of dedicated outdoor enthusiasts who tie their identities to their favorite outdoor activities.
- **John Poelking, Leisure & Media Analyst**

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- **What you need to know**
- **Definition**

EXECUTIVE SUMMARY

- **Video summary**
- **Market overview**
Figure 1: Outdoor participation of Americans aged 6+ – Number of participants, 2008-17
- **Top takeaways**
- **Key consumer trends**
- **Dedicated participants define activities**
Figure 2: Frequency of outdoor activity participation, by share of participants, September 2019
- **Tapping into social circles for information**
Figure 3: Resources used to stay informed about the outdoors, September 2019
- **Linking outdoor identity to activism**
Figure 4: What an outdoor brand needs to do, September 2019
- **Difficult to completely disconnect from the world**
Figure 5: The role of phones outdoors, September 2019
- **What it means**

THE MARKET – WHAT YOU NEED TO KNOW

- **Stable growth in outdoor participation**
- **Staying active can be an uphill climb**
- **Maintaining the environment**

THE OUTDOOR ACTIVITY MARKET

- **Outdoor participation rising with population**
Figure 6: Outdoor participation of Americans aged 6+ – Number of participants, 2008-17
- **Average outdoor participants go outdoors about once a week**
Figure 7: Number of outdoor outings per person in the past year, 2017
- **Little diversity in types of activities**
Figure 8: Number of outdoor activities in past year, September 2019
- **Other retailers taking share from sporting goods stores for outdoor market**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 9: Total US revenues and forecast of sporting goods stores, at current prices, 2014-24

MARKET PERSPECTIVE

- **Making the most out of the outdoors on vacation**
Figure 10: Outdoor vacation activities, January 2018
- **Out-of-home leisure dominated by casual activities**
Figure 11: Preference of out-of-home leisure activities, August 2019
- **Families spend most of their time outdoors with kids**
Figure 12: Family activities, June 2019
- **Growth of fitness centers points to an active population**
Figure 13: Fitness facility membership status and interest, November 2018

MARKET FACTORS

- **Consumers expect a lot out of environmentally conscious brands**
Figure 14: Attitudes toward companies and the environment, April 2018-June 2019
- **Most consumers are working to get healthier**
Figure 15: Health goals, August 2019
- **What states are doing to protect US land**
- **Renewing legislation to keep public lands public**
- **Encouraging outdoor recreation within borders**

KEY TRENDS – WHAT YOU NEED TO KNOW

- **Preserving the adventure**
- **Taking the extreme too far**
- **Finding new ways to engage outdoor enthusiasts**

WHAT'S WORKING

- **Running has made big strides in the last decade**
Figure 16: Fastest growing outdoor activities, by growth, 2007 vs 2017
- **Outdoor brands seek deeper connections outside of products**
Figure 17: @thenorthface "Global Climate March" Instagram post, September 2019
- **Using influencers to extend a brand**
Figure 18: @renner4real "Amazon store" Instagram post, August 2019

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

WHAT'S STRUGGLING

- **Skateboarding, extreme water activities losing participants**
Figure 19: Slowest growing outdoor activities, by growth, 2007 vs 2017
- **Overcrowding at tourist sites causes turmoil**
Figure 20: @hdfaorg "Everest Traffic Jam" Instagram post, May 2019
- **Unpredictable seasons make for difficult planning**
- **Outdoor brands stepping away from firearms**

WHAT TO WATCH

- **Using history to create relevance for outdoor locations**
- **Betting on reliability**
- **Using technology to keep people away from technology**
Figure 21: @hipcamp "Sandiwood Farm" Instagram post, October 2019
- **Teaching executives about social responsibility**
- **Building communities through experiences**
- **Tech advancements focus on safety and convenience**
Figure 22: @hovdingofficial "Bike helmet" Instagram post, October 2019

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Frequent outdoor participation is common**
- **One quarter of outdoor enthusiasts go outdoors all year**
- **The outdoors is best shared with others**
- **Seeking information from personal connections**
- **Finding the activists**
- **Maintaining some connection to the real world**
- **Preparation and reliability important in outdoor gear purchases**
- **Linking activities to identity**

FREQUENCY OF OUTDOOR ACTIVITY PARTICIPATION

- **Breathing in the same amount of fresh air as last year**
Figure 23: Outdoor participation compared to previous year, September 2019
- **Younger enthusiasts find more time for the outdoors**
Figure 24: Outdoor participation compared to previous year, by age, September 2019
- **Easily accessible activities tend to be the most popular**
Figure 25: Participation in active outdoor activities, September 2019

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **More than half of outdoor enthusiasts go outside multiple times a month**
- **Outdoor activities a monthly occasion for many participants**
- **Most popular activities have active participants**
- **Dedicated audiences in less popular activities**
- **Key differences between RV and tent camping frequency**

Figure 26: Outdoor participation segments, September 2019

Figure 27: Frequency of outdoor activity participation, by share of participants, September 2019

SEASONALITY AND OUTDOOR ACTIVITIES

- **One quarter of enthusiasts go outside all year**
Figure 28: Seasons of outdoor activities, September 2019
- **Older adults have more time for year-round outdoor activities**
Figure 29: Seasons of outdoor activities, by age, September 2019
- **Cost a barrier to consistent participation**
Figure 30: Year-round outdoor participation, by household income, September 2019
- **Skiers go outdoors all year, water sports difficult to do in winter**
Figure 31: Year-round outdoor participation, by type of activity, September 2019

OUTDOOR COMPANIONS

- **Outdoor time is best spent with others away from the world**
Figure 32: Attitudes toward outdoor companions, September 2019
- **Families carry a lot of influence in outdoor activities**
Figure 33: Outdoor companions, September 2019
- **In their words**
- **Biking and running are solo ventures**
Figure 34: Solo outings – Select items, by type of activity, September 2019
- **More adventurous activities open opportunities with broader social circles**
Figure 35: Type of activity, by companions – Family and friends, September 2019

STAYING INFORMED ABOUT THE OUTDOORS

- **Social circles keep enthusiasts informed**
- **Family and friends make the biggest impact**
- **Social media influencers more important than brands**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- More traditional media losing influence**
 Figure 36: Resources used to stay informed about the outdoors, September 2019
- Social media, in-person events impact young enthusiasts**
 Figure 37: @carolinegleich "Van Life" Instagram post, October 2019
 Figure 38: Resources used to stay informed about the outdoors – Select items, by age, September 2019
- Looking to media for specific needs**
 Figure 39: Resources used to stay informed about the outdoors – Select items, by type of activity, September 2019

WHAT AN OUTDOOR BRAND NEEDS TO DO

- Outdoor enthusiasts defend what they love**
 Figure 40: Attitudes toward outdoor activism, September 2019
- A rise in activism**
 Figure 40: Attitudes toward outdoor activism, September 2019
- Hunting: a notable anomaly**
- Everyday contributions matter more than grand gestures**
 Figure 41: CSR for outdoor brands, September 2019
- Most outdoor enthusiasts expect only a few actions to be taken**
 Figure 42: Number of CSR initiatives for outdoor brands, September 2019
- Community support resonates with large families**
 Figure 43: The importance of supporting communities, by number of children under the age of 18 in the household, September 2019

STAYING CONNECTED OUTDOORS

- What it means to disconnect**
- Phones are good for photos, not social media**
 Figure 44: The role of phones outdoors, September 2019
- Women bring the mobile experience outdoors**
 Figure 45: The role of phones outdoors, September 2019

OUTDOOR GEAR PURCHASE BEHAVIORS

- Enthusiasts plan ahead for long seasons**
- Reliability beats cost in outdoor products**
- Any season is buying season**
 Figure 46: Attitudes toward outdoor gear, September 2019
- New and replacement equipment equally important**
 Figure 47: Gear purchasing behaviors, September 2019
- Some activities need new gear more than others**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 48: Gear purchasing behaviors, by type of activity, September 2019

ATTITUDES TOWARD THE OUTDOORS

- **Most enthusiasts define themselves by the outdoors**
Figure 49: Attitudes toward outdoor identity, September 2019
- **New can be better for outdoor enthusiasts**
Figure 50: Attitudes toward active outdoor activities, September 2019

APPENDIX – DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Consumer survey data
- Consumer qualitative research
- Abbreviations and terms
- Abbreviations
- Terms

APPENDIX – THE MARKET

Figure 51: Participation in outdoor activities, by share of population, 2007 and 2017

APPENDIX – THE CONSUMER

Figure 52: Attitudes toward the environment, April 2018–June 2019

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.