

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

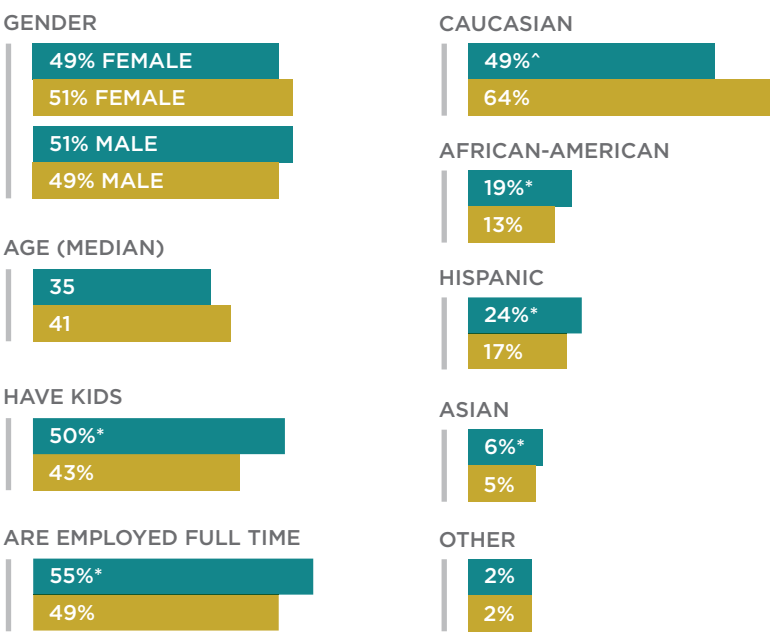
URBAN OUTDOOR CONSUMERS

Urban consumers are active participants in outdoor recreation and are driven by a diverse range of motivations for getting outside.

URBAN OUTDOOR CONSUMERS
ALL OUTDOOR CONSUMERS



WHO ARE THEY?



WHY ARE THEY VALUABLE TO OUTDOOR?

Urban consumers are a strong opportunity market based on their outdoor participation behaviors and higher spend on outdoor products.

TIME SPENT OUTSIDE (MEAN # PER WEEK)



CONSIDER THEMSELVES OUTDOORSY (TOP TWO BOX)

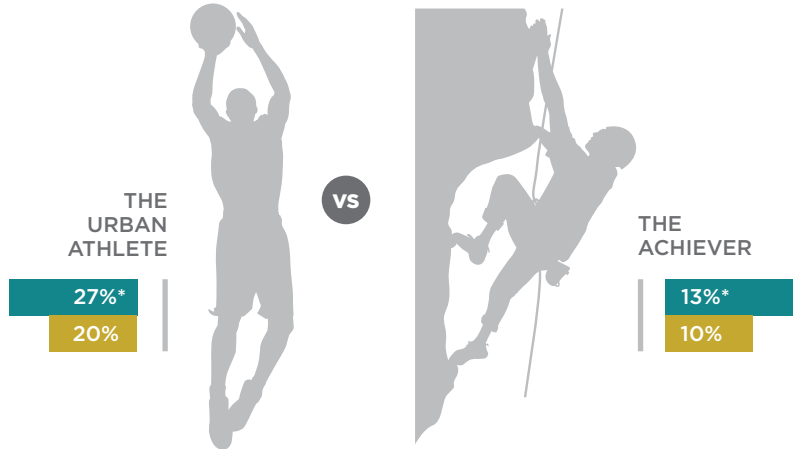


ANNUAL SPEND ON OUTDOOR APPAREL, FOOTWEAR, EQUIPMENT AND ELECTRONICS



WHICH SEGMENTS ARE THEY IN?

Urban outdoor consumers are more likely than all outdoor consumers to be:

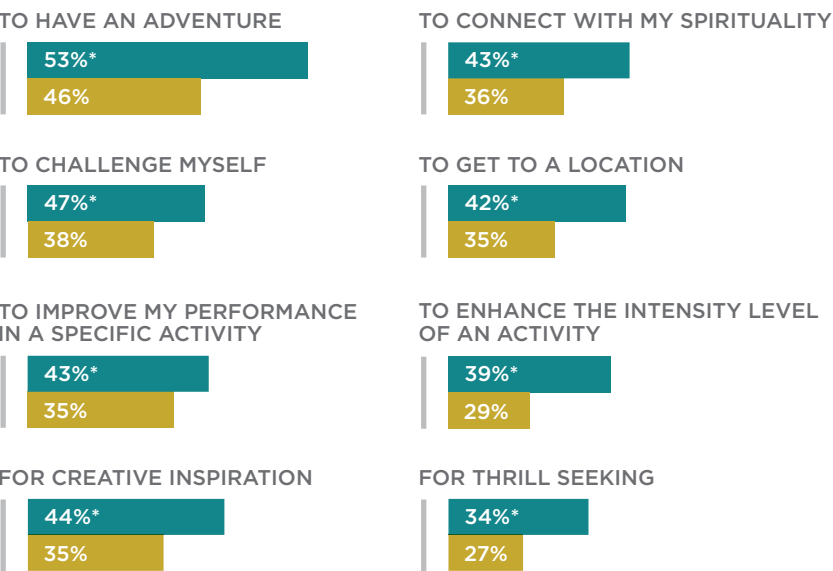


WHAT GETS THEM OUTSIDE?

The emotional values of the outdoors are what most inspire urban consumers most to get out and be active.



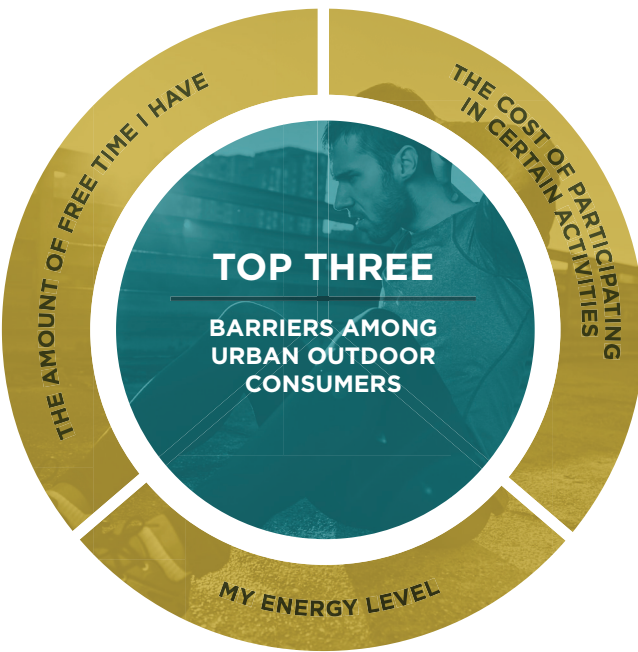
Urban outdoor consumers are more likely than all outdoor consumers to report the following motivations for getting outdoors (difference of at least 7%):



WHAT PREVENTS THEM FROM GETTING OUTSIDE?

The barriers to getting outdoors for urban consumers are varied and more functional in nature.

Urban outdoor consumers are more likely than all outdoor consumers to report that accessibility to kid-friendly activities keeps them from participating in outdoor activities.



*/^ denotes values higher/lower than all outdoor consumers at a 95% level of confidence.