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

REGIONAL

COMPARISON CHART



VERSATILE / GOOD FOR **MANY ACTIVITIES** IS MADE IN AMERICA

Shopping Attitudes IEED THE BEST GEAR OR EQUIPMENT ON THE MARKET. **EXPERIENCES ARE MORE IMPORTANT THAN ACQUIRING PRODUCTS.**

WHAT BRANDS DO THEY USE OUTDOORS?

Top Brands Associated With Outdoors Coleman € Cabelas

Columbia

Top Brands Used In The Outdoors Columbia

& Columbia Timberland

WOOLRICH'

HIGHLY TECHNICAL

Shopping Attitudes

ASSOCIATED WITH THE OUTDOORS.

WHAT BRANDS DO THEY USE OUTDOORS?

L.L.Bean

TEND TO BUY WELL KNOW BRANDS FOR OUTDOOR ACTIVITIES.

Top Brands Associated With Outdoors

Top Brands Used In The Outdoors

WHAT DO THEY LOOK FOR IN OUTDOOR RETAILERS?

HAS EXTREMELY FUNCTIONAL

CARRIES UNIQUE PRODUCTS*

FOOTWEAR, APPAREL AND GEAR*

WHAT DO THEY LOOK FOR IN OUTDOOR RETAILERS?

HAS A WIDE SELECTION OF APPAREL, FOOTWEAR AND EQUIPMENT HAS THE LOWEST PRICES IS CONVENIENTLY LOCATED HAS PRODUCTS FOR THE **ENTIRE FAMILY**

HAS SPECIALS OR SALES

Top Brands Associated With Outdoors

WHAT BRANDS DO THEY USE OUTDOORS?

Shopping Attitudes

THEIR PERFORMANCE.*

(E.G., MATERIALS, ORIGIN).*

Walmart : Jeep

SPEND MORE ON THINGS THAT ARE VITAL TO

BRAND I TRUST*

THINGS ARE MADE

MIKE Walmart :

Top Brands Used In The Outdoors

WHAT DO THEY LOOK FOR IN OUTDOOR RETAILERS?

HAS THE LOWEST PRICES IS CONVENIENTLY LOCATED ALLOWS YOU TO COMPARE PRICES

HAS A VERY APPROACHABLE STAFF

MASS MERCHANDISER

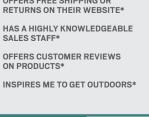
(E.G., TARGET, WALMART)

WEBSITE OF MASS MERCHANDISER

(E.G., TARGET.COM, WALMART.COM)

SPORTING GOODS CHAIN STORE

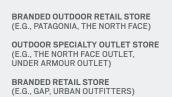
(E.G., DICK'S SPORTING GOODS)

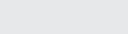




OFFERS PRODUCTS FOR BEGINNERS HAS A LOYALTY/REWARDS

Top Channels For Outdoor Gear Purchases





Top Channels For Outdoor Gear Purchases

MASS MERCHANDISER

(E.G., TARGET, WALMART)

SPORTING GOODS CHAIN STORE

(E.G., DICK'S SPORTING GOODS)

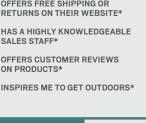
GENERAL ONLINE RETAILER

(E.G., AMAZON, EBAY)



HAS A COMFORTABLE AND WELCOME ENVIRONMENT

ENTIRE FAMILY*



WHERE DO THEY SHOP? Top Channels For Outdoor Gear Purchases



(E.G., PATAGONIA, THE NORTH FACE) **OUTDOOR SPECIALTY OUTLET STORE** (E.G., THE NORTH FACE OUTLET, UNDER ARMOUR OUTLET) BRANDED RETAIL STORE (E.G., GAP, URBAN OUTFITTERS)











Average Time Spent Outside Per Week



HOURS*











TRAVEL DOMESTICALLY AND ABROAD





OUTDOORS IS NOT A PLACE TO DISCONNECT FROM **TECHNOLOGY**



TO EXPLORE SOMETHING NEW TO MAKE EVERYDAY ACTIVITIES

FOR A SENSE OF ACCOMPLISHMENT

WHY THEY DON'T GO OUTDOORS?









IN CERTAIN



WHAT DO THEY VALUE IN THE OUTDOORS?



Top Purchase Drivers







(AMELBAK GOPTO



Top Brands Used In The Outdoors





WHAT DO THEY LOOK FOR IN OUTDOOR RETAILERS?







Top Channels For Outdoor Gear Purchases **BRANDED OUTDOOR RETAIL STORE**

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