

shaping the future

Tracking the Customer Journey



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Introduction

The OIA's Shaping the Future reports provide members and businesses active within the outdoor industry with valuable intelligence that can help them make well informed business decisions within an increasingly competitive market place.

The reports provide ongoing insight allowing businesses to spot trends in the industry, keep pace with emerging activities, promote relevant products and inform marketing strategy.

Key insights include:

- Who's active in the Outdoors; how frequently they engage, and where they like to go to pursue their passions. They also suggest what activities people would like to try in the future and how they begin to experience new activities.'
- What's important to people active in the Outdoors in terms of service expectations, ethics and wider issues such as the importance of environmental sustainability.

- Purchasing behavior; what outdoor related products and services people spend their hard earned money on; what motivates them to shop, how frequently they buy and what influences their purchases.

Similarly the reports reveal how people research their purchases, the environment they choose to spend within and what factors influence this key decision.

- Other key issues, concerns and opportunities facing retailers, Brands and activity centres within the outdoor sector.

Participation ⇒ Perceptions ⇒ Preferences ⇒ Purchasing behaviour
⇒ Useage = Market knowledge and opportunities

Understanding what influences and considerations drive your customers will assist you in offering relevant and appealing products; as well as communicating using appropriate channels and timings.

The customer journey

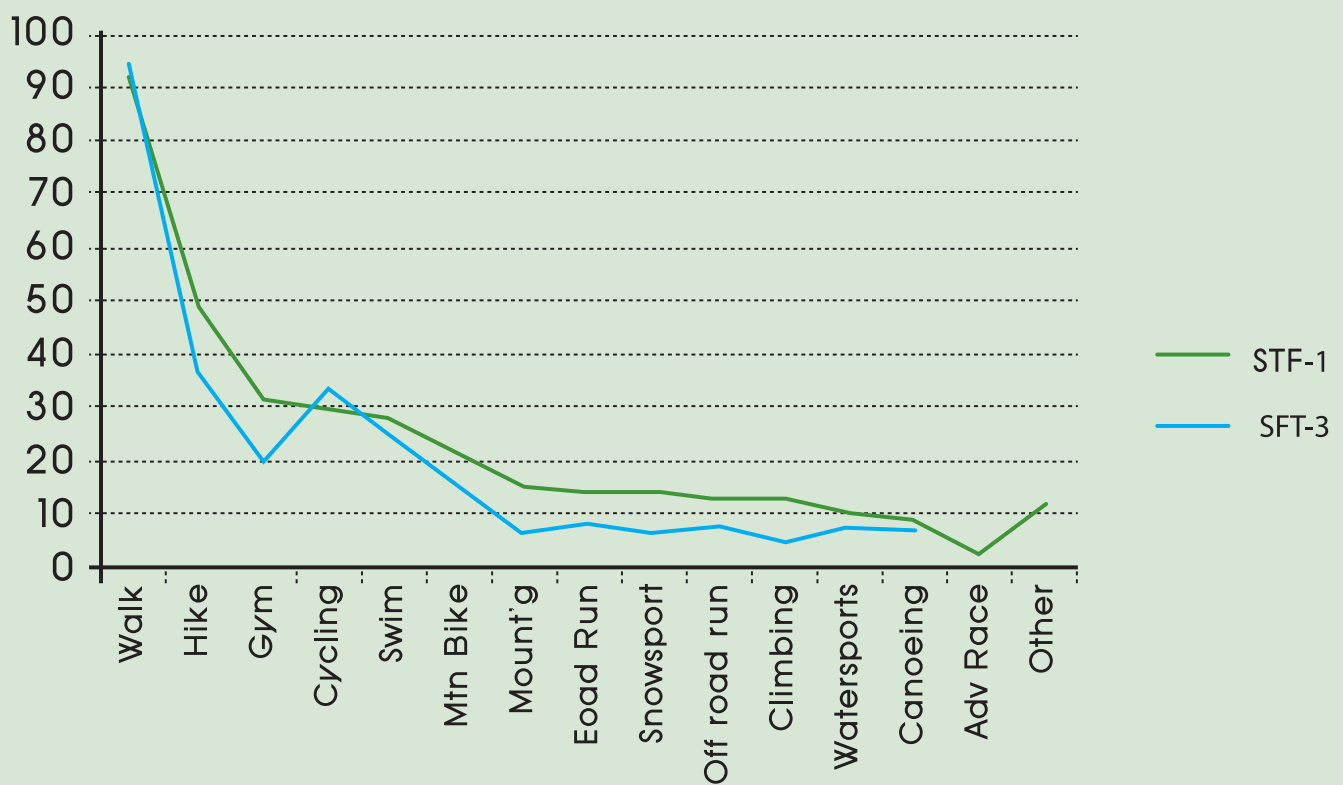
Against this background the reports help the reader review their own businesses and answer questions such as:

- Am I offering the products or services that potential customers are looking for?
- What are the best media channels to use in order to communicate with my target customer base?
- How important is price in the buying process?
- Just how significant is the internet as a research and selling vehicle?
- Do I have enough understanding of what these consumers want?
- Do I have enough understanding of what influences these consumers?
- Am I missing a cross marketing opportunity?
- Are there partner or sponsorship opportunities with other organizations?
- Am I focusing my activities on the most effective areas which are the biggest influencing factors (e.g. in-store training, POS)?
- How important is the environment to the consumer, and therefore in our communications?
- Do women and men have different motivations for their activities?
- Can we motivate more people to utilise the outdoors for improved health and wellbeing if this is important (look at consumer segmentation to identify which consumer group - e.g. age/ gender - this is most important to)
- Do people at different life stages participate in different ways?

This enables you to spot changes and trends, ensure that your business and product offerings remain relevant and help predict new opportunities as they emerge.

Some examples on how to use the reports...

I. Participation trends



Adventurous activities have become marginally less popular over the last 2 years. Can this be linked into the recession and people spending less on non-core products? Is our range too extensive for todays market? What are the age/ gender differentials showing across the reports and are we incorporating this into our communication strategy?

STF-1 = Shaping the Future Part 1
STF-3 = Shaping the Future Part 3

2. Perceptions

Health and Wellbeing (Shaping the Future Part I)

Table 12 - Attitudes towards outdoor activities – strongly agree / agree

	All	Male	Female	16-24	25-34	35-44	45-54	55-64	65+
The outdoors allows me to escape the everyday pressure of life	68%	69.3%	67.0%	74.3%	70.5%	70.3%	68.3%	66.6%	61.1%
I enjoy being one with nature	52%	55.0%	48.8%	60.1%	54.6%	53.7%	52.3%	50.5%	48.2%
Outdoor participation keeps me fit and healthy and is an important part of my wellbeing	51%	51.8%	50.4%	62.4%	52.0%	54.1%	52.0%	47.0%	44.3%

With such a strong (emotive) motivation, can I incorporate this into a marketing campaign? Looking at whom it most closely associates with, can I create a campaign to connect with the relevant audience, taking into account age group, via a social media campaign to connect with, and inspire, my customers? Could I link this to a promotion with a holiday company?

Environmental

Table 15 - Attitudes towards Environmental issues “Environmentally friendly products (all) are more expensive than standard ones”.

Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	Maybe / not sure
19%	59%	--	2%	0%	1%

How can I better communicate that all environmental products are not more expensive? Can I segment our customers (from the research) to find out whom this is most important to and target with a key message, perhaps comparing prices of comparable products which aren't environmentally friendly?

If environment is proven to be an important factor to consumers, can I target the message through joint social responsibility and make my message more emotive? Are we as a brand/ retailer/ centre doing more than others and how can we communicate this better to differentiate ourselves?

3. Purchasing behaviour

Retail channels (Shaping the Future Part 2)

Table 18 - Last few outdoor purchases (any products) by channel where they were purchased from by gender.

	Total	Male	Female
Specialist Outdoor Store	70%	72%	67%
General Outdoor Store	32%	30%	35%
Specialist Outdoor Online Retailer	27%	33%	20%
General Outdoor Online Retailer	10%	11%	8%
Department Store	7%	6%	7%
Supermarket	5%	4%	5%
Sports Shop	7%	7%	7%
Mail Order	9%	10%	7%

Comparing with STF 3 has preference to retail channels changed? If so are we factoring this into our ecommerce and social media strategy taking into account the difference in the gender split as well in our communications?

Why are women less likely to shop in a specialist outdoor retailer? Is our store environment too intimidating? Are women's products easily accessible as soon as you enter the store? What is the degree of participation for activities looking at STF 3 for women - are those products prominent?

Influencing factors in-store (Shaping the Future Part 3)

Table 21 - When in-store, which factors influence your purchase decisions (POS)?

	Total	Male	Female
Product information leaflets	59%	61%	55%
Product hanger tags	47%	46%	49%
Window display	15%	13%	16%
Posters	3%	3%	3%

As a brand, are we including information leaflets to convey key product info and messages? As a retailer, do we display our information leaflets from brands prominently? Can we use information leaflets to support key campaigns where applicable?

If product hanger tags are clearly influential in choice, do we make them visually strong enough to stand out and are we focusing on the right information? As a retailer are we hanging them properly outside products so are visible if this is a key influencer in helping customers make an informed choice?

Should they be more geared towards men?

4. Usage

Outdoor Centres (Shaping the Future Part 3)

Table 42 - what would help you consider using one in the future?

	Total	Male	Female	16-24	25-34	35-44	45-54	55-64	65+
More accessible and easy to understand information	35%	37%	32%	43%	48%	45%	33%	32%	31%
Easy and straight forward activity/course booking	20%	20%	20%	57%	38%	30%	20%	16%	13%
Full explanation of risks and rewards	10%	12%	8%	29%	20%	14%	11%	7%	10%
A variety of levels of experience needed including 'taster' and 'novice' sessions	58%	53%	68%	29%	54%	59%	61%	59%	52%
Clear explanation of staff qualifications and experience	8%	8%	9%	29%	16%	10%	10%	6%	6%
Better facilities accommodation/ food	10%	12%	8%	14%	17%	14%	9%	10%	8%

Are we using the right channels to communicate to outdoor enthusiasts? What are the most effective channels looking back in the report? Do we need to change our message? What are the cross marketing opportunities with brands and retailers we can use?

Are we missing an opportunity by not tailoring our courses to entry level, or are we not communicating the fact we do these courses properly?

What are the most effective communication channels looking back in the report to reach the age group whom this most interests?

Summary

The reports help deliver a competitive edge to your business.

- They help you understand the environment in which your business operates.
- Crucially they help you understand your customers; existing and potential, so that you can both offer relevant products and communicate with the people most likely to buy them.
- They do this over time so that you can track changes and spot new opportunities as they emerge.
- They provide valuable intelligence whether your business is as a retailer, brand or activity provider.

For more information on the three reports contact the OIA at info@outdoorindustriesassociation.co.uk

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Shaping the Future reports are available free to all OIA members and £399+VAT for non-OIA members.