

GETTING < WOMEN < ACTIVE



Photo courtesy of Bill Stevenson



Photo courtesy of Julie Meyers



An In-depth Look at Participation, Attitudes and Behaviors



Outdoor Industry Foundation (OIF) research identifies women as one of the four key consumer segments with the greatest potential for new participation in outdoor activities. This section of the *Tool Kit for the Trade* takes a targeted look at the women's market and analyzes opportunities for engaging this important segment in outdoor recreation.

Future Tool Kits for the Trade will target Youth, Hispanics and Singles 45+.

A TARGETED LOOK AT WOMEN IN THE U.S.

According to 2003 census data, American women outnumber men by about 3%. There are 118 million women age 16 and older in the U.S. The average American woman is Caucasian, 37 years old, has a high school degree or equivalent, is married and working. Employment for women is expected to increase by 16% between 2000 and 2010. Working women are contributing significantly to increases in household incomes from both married and single female headed households. Nearly 3 of every 10 households are headed by single females, who bring in the entire household income. In short, this income flow is giving women a tremendous amount of purchase power. Women influence over 80% of dollars spent in the U.S. They make more spending decisions than men for family purchases, travel, financial services and automobiles.

WOMEN IN AMERICA

The General Female Population

- ☆ 118 million women age 16 and older in the U.S.
- ☆ Women-owned businesses comprise 40% of businesses in the U.S.
- ☆ Women influence 80% of dollars spent
- ☆ Purchases made by black women are the single biggest influence on the growth of African-American spending

80% of \$\$ spent = \$3.4 trillion/year (75% of US GDP)

Current Women Participants

- ☆ 88% started their favorite activity between ages five and eighteen
- ☆ 88% say getting outdoors reduces their stress levels and provides a sense of accomplishment
- ☆ 80% feel that outdoor activities strengthen family relationships

The Average Female Outdoor Recreation Participant is:

- Age 37
- Married (53%)
- Caucasian (80%)
- Employed (62%)
- Earns \$53-\$57K a year



Photo courtesy of Berne Broudy

GETTING WOMEN ACTIVE

85% of all women express interest in getting involved in one or more outdoor activities in the next two years.

Women are ideal targets for participation in outdoor activities. They are major influencers in household purchases, they are more likely than men to buy something once they see their friends using a product, and they are likely to introduce others to their interests. In fact, a third of women participants introduce others to their favorite activity. Women cite their top 4 favorite activities as road biking, camping, backpacking/hiking and paddle sports. Cross over participation for most women falls into the same top four activities. From 2002 to 2003, women's participation in road biking, car camping and snowshoeing, the winter version of hiking, showed statistically significant growth.

- 61% of women currently participate in outdoor recreation.
- The average woman participant takes part in more than 2 different outdoor activities a year.
- 33% of women introduce others to their favorite sport, most introductions are informal.
- As a benchmark, 67.6 million women participated in at least one outdoor activity in 2003.

TAKE ACTION TIPS

- Focus on and encourage participation in "gateway activities" such as hiking, biking, camping and paddling. These outdoor activities appeal to the greatest number of women.
- Partner with local groups whose members already have a connection to the outdoors to cross promote and identify new participants.

Motivators for Participation

Women who spend time in the outdoors are more likely to “go-it-alone.” Recuperation and the experience of feeling a connection with the outdoors are some of the top reasons why women get outside. Most women with families choose family and friends as the next best thing to being alone in the outdoors. A secondary reason for getting these women outside is their family. Involving children in your activities increases the opportunity for those children to be outdoor participants.

- 75% of women agree their feeling of connection to the outdoors is the most important reason to get outdoors.
- 35% of women’s households have children with an average age of 10.

TAKE ACTION TIP

- Single moms need a night out – create a night of shopping and mingling for singles in your community. Provide light refreshments and hors d’oeuvres.

Barriers to Participation

Aside from time, women have expressed their lack of experience and not having a mentor in their lives as key reasons for not participating in outdoor activities. Many women feel their activity of choice can be monotonous. An opportunity to reach these women lies in the ability to offer choices and help them feel encouraged and capable.

- 34% say they lack experience, there is monotony in their activity and they never really had a mentor in their life.

TAKE ACTION TIPS

- Facilitate learning a new activity with the rule of “one can never make enough mistakes.” (e.g. conduct a workshop on how to change a flat bike tire. Supply participants with as many tubes as needed to learn how to successfully change their own tire.)
- Be a conduit for events and activities in your area. Keep an up-to-date event calendar in your store and on your website. Provide links to websites like Active.com, ReserveAmerica.com and Recreation.gov for additional information on outdoor recreation in your area.

WOMEN OUT OF TIME

The latest research reflects topics such as spirituality, finding connectedness with one’s community and having fun as major life forces for Americans today, especially for women. Half of all women participants feel the time crunch of having too many commitments. There is often a “desire gap” for women marking the difference between her desire to do something (outdoor activity) and her frequency of doing it. Women are stressed out and find themselves taking on both traditional roles like taking care of the family and homemaking in addition to maintaining a full or part time job. While research from Leisure Trends Group states that “from age 25 on, women have less free time than men,” there is also research that women do more in the free time they have. For women who are mothers, it is true that mothers pressed for time are likely to be more active than mothers who have more free time.

- 52% of mothers who are time pressed participate in outdoor activities vs. 45% who have more time.
- 50% of women participants feel the time crunch of too many commitments.
- 80% of all participants, regardless of gender, feel more youthful, less stressed and more accomplished after participating in an outdoor activity.

TAKE ACTION TIPS

- Provide in-store product demonstrations. Create events for fitting hiking boots, backpacks, snowshoes or suiting up for a camping trip. Time will be saved by helping clients find the right product from the start.
- Make your store convenient for busy moms by carrying merchandise designed for children - Kelty’s kid carriers are a great example.



WOMEN'S RETAIL SALES

Women's specific apparel sales have shown increases above that of men's and unisex clothing. The driving force for sales is likely related to an increase of female outdoor recreation participants, recognition of manufacturer changes to garments and gear, and noticeable additions to retail environments such as well lit, tidy and spacious dressing rooms. Both retailers and manufacturers can benefit by meeting the needs of women consumers.

- Women spend an average of \$295 annually per individual on outdoor apparel and equipment.
- With 67 million participants, the potential of the women's market exceeds \$19 trillion annually.
- Women's specific equipment, apparel and footwear sales in 2004 amassed \$875 million.
- There was a 60% increase in women's specific sales from 2002 to 2004. By comparison, sales of unisex and men's clothing showed only a 4% increase during the same time period.
- 36% of women surveyed by REI believe gear specifically designed for women can enhance their performance.
- 64.7% of women say they look to store displays for their apparel inspiration.

TAKE ACTION TIPS

- Collaborate and cross market with other like-minded local businesses in your area. Place coupons/flyers in local gyms and yoga studios. Inviting women to a yoga event in your retail store is a great way to introduce them to your store. Need another reason? According to an REI survey, 70% of women take yoga as a way to improve their performance in other activities and 59% of men say the same.

WHAT WOMEN WANT

Women are price conscious shoppers who look for convenience and sometimes give into their desire for new clothing or want for new gear. For women, brands are more important than quality for apparel purchases. Today, it's fashionable to be "outdoorsy." Reflective of that, 24% of consumers indicate that they purchase their outdoor footwear and apparel in department stores. For equipment purchases, location of the store is the biggest factor, above quality, selection and brand availability.

TAKE ACTION TIPS

- Conduct in-store fashion shows - serve wine and cheese. Invite community leaders and social clubs to attend.
- Cater to a woman's fashion sense, merchandise by brand inside of activities (e.g. group all Hind running merchandise together within the running section of your store).
- Women love to talk. Organize your store as a meeting place. Take note of the Saturn company picnics for first time buyers as a great example of brand building and community development.

For more Take Action Tips see the Retail Tip Sheet.

