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Background paper

The new outdoor mindset

Spending time outdoors is a basic human need

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But what does it mean to be outdoors and what is its significance for people? What hurdles need to be overcome for the perfect outdoor experience? Commissioned by the OutDoor by ISPO team at Messe München, the renowned Cologne-based market research institute rheingold searched across Germany for answers to these questions and investigated the spiritual core of being outdoors. The results can be used to derive specific recommended actions for outdoor gear manufacturers and specialty retailers.

The participants of the “Outdoor as a human need” study were asked about their inner desires, longings, fears, and ideals when it comes to outdoor activities. The result: “outdoor” is a process as individual as the people themselves and closely connected to emotions. It is about reducing inhibitions, overcoming fears and uncertainties, and ultimately, emerging stronger from the experience. It is also becoming clear that “outdoor” is increasingly gaining importance in our fast-paced society. Providing a sense of connection, it finds its way into daily, urban life. The activities themselves can be diverse in nature, far beyond hiking, climbing, or camping.

Here is an overview of the key findings regarding what is at the heart of being outdoors, the personal challenges of enthusiasts and athletes, as well as the importance of products, brands, and retailers:

Outdoor is a process

All outdoor moments are created over a number of stages, from the desire to be out in the open and planning the activities through to realization and returning home. Each of these stages is connected to emotions: fears and uncertainty

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combined with curiosity are replaced by euphoria when the goal that has been set is reached – be it conquering a mountain top, riding the perfect wave, or building a lakeside campfire. What remains afterwards is a feeling of strength when returning to everyday life.

Outdoor takes place in four dimensions

Outdoor activities can be categorized into four main interconnected dimensions: the civilized safe bet in well-cultivated surroundings, the humble entry level, the natural untouched wild and the gutsy survivalist adventure. Thus, one person might find their inner peace by hiking through the countryside or fishing at their local pond, while another relaxes by climbing steep cliff faces with rope and hooks. This means that there are different ways to approach defining the term “outdoor.” While “getting back to nature” is the traditional outdoor approach, which can be taken to the next level with “survival and adrenaline,” other new fields have opened up with names like “controlled escapism” and “urban warrior.” They are generally already accepted and practiced by consumers as fitting into the “outdoor” genre.

Equipment serves as a way in and advertisement

The right equipment enables access to certain outdoor activities. It supports, provides protection, and, in some sports, can save lives if something goes wrong. This is at odds with the idea of going without and the getting back to nature that many associate with the term outdoor. Generally, it can be said that while functionality and quality take priority over fashion aspects, the latter serve as a decisive differentiating feature when it comes to making a purchase decision. Even after returning from the great outdoors, the equipment can continue to do its job, such as the functional jacket worn when commuting to work by bike. It also brings a bit of that outdoor feeling to everyday life and serves as an advertisement for an active lifestyle – something at the very heart of the urban outdoor concept.

Retailers to point the way, brands to provide support

Retailers pave the way to outdoor experiences. They not only sell products, but also help consumers get started or go further in the world of outdoor activities. If the retailer approaches the customers correctly, it will take them on an adventure,

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right in the shop or on the website – one that takes place in the mind and awakens desires.

Brands are reliable partners in this adventure through their products. The more an outdoor activity is performance-oriented, the higher the knowledge about individual brands and the easier it is to name the brands and their products.

The reconciliation of wilderness and civilization – outdoor in everyday life

Outdoor means taking a piece of sophistication into primitive surroundings, this being more or less pronounced depending on the item of equipment. Technical equipment in particular offers a certain level of comfort: instead of maps and compasses, we have GPS devices with pre-loaded routes, and instead of campfires and torches, we use gas cookers and head torches. On the other hand, outdoor in everyday life brings the wild to civilization – and thus the feeling of strength gained from outdoor pursuits manifests in daily life, whether through small challenges such as a new route on the way to work, through memories, or the crossover of outdoor clothing, equipment, and food into day-to-day life.

Outdoor – emotional need encounters barriers to entry

In their outdoor experience, people are looking for a temporary escape from everyday life, without pressure and stress. However, many outdoor brands convey something quite different in their visual language. They use images of professionals, creating the impression of performance orientation and competition. The fear of losing control due to lack of knowledge and skills, as well as external influences, can also scare off some outdoor enthusiasts. And last but not least, location can be a hurdle. Not everyone has the right outdoor environment on their doorstep. The community that can help overcome these difficulties is often perceived as exclusive and also performance-oriented.

Consumer thinking as the basis for developing the industry

These key points lead to specific recommended actions for manufacturers and retailers to open up new target groups and optimize existing offers. It is important to create a “welcoming culture” with low barriers to entry and worlds of experience for outdoor enthusiasts at any level, through differentiated offers and holistic approaches in product development, marketing, and sales. At the same time, it is

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vital not to reduce the desirability of “outdoor.” Details can be found in the seven white papers that make up the study. They are available [online](#) for download.

The way consumers think and behave is also reflected in the new concept from OutDoor by ISPO. It combines new outdoor segments already recognized by the public such as mountain biking, trail running, or water sports with classic activities such as climbing or hiking. All areas are presented in a highly experience-oriented manner at the annual trade fair, which is accompanied throughout the year by a support network of digital and analogue services.

The methodology of the study

In conducting the study “Outdoor as a human need,” the rheingold institut took a qualitative approach. With the help of the ISPO Open Innovation community, a number of participants were asked about the topic “outdoor.” The research team used the answers to develop hypotheses, which were then discussed in two groups under the guidance of a psychologist. The results from these discussion groups then served as the basis for one-on-one depth psychological interviews totaling more than 36 hours.

About OutDoor by ISPO

OutDoor by ISPO is the year-round platform for a new outdoor movement, combined with the largest annual international trade fair for the outdoor sector. This is carried out in close partnership with the European Outdoor Group (EOG). ISPO Business Solutions expand the portfolio year-round with both digital as well as cross-media services and create a far-reaching platform for the whole outdoor community. The trade fair OutDoor by ISPO will be held for the first time at Messe München from June 30 to July 3, 2019. From 1993 to June 2018, Friedrichshafen hosted the trade fair.

About ISPO

ISPO is the world’s leading sports network for business professionals and consumer experts. The platform was launched in 1970 and brings together an integrated range of industry-related analog and digital services under the ISPO family brand name. This includes the world’s largest multisegment trade fairs ISPO Munich, ISPO Beijing and ISPO Shanghai; the online news portal ISPO.com, and the business solutions ISPO Digitize, ISPO Brandnew, ISPO Open Innovation, ISPO Award, ISPO Academy, ISPO Textrends, ISPO Job Market and ISPO Shop. With its far-reaching mix of innovation promotion, industry networking, know-how and editorial insights, ISPO works 365 days a year to support companies and sports enthusiasts, and to foster passion for sport worldwide.

Messe München

Messe München is one of the leading exhibition organizers worldwide with more than 50 of its own trade shows for capital goods, consumer goods and new technologies. Every year, a total of over 50,000 exhibitors and around three million visitors take part in more than 200 events at the exhibition center in Munich, at the ICM – Internationales Congress Center München and the MOC Veranstaltungszentrum München as well as abroad.

Together with its subsidiary companies, Messe München organizes trade shows in China, India, Brazil, Russia, Turkey, South Africa, Nigeria, Vietnam and Iran. With a network of associated companies in Europe, Asia, Africa and South America as well as around 70 representations abroad for over 100 countries, Messe München has a global presence.