

OUTDOOR RECREATION & SPORTING ACTIVITIES – US – 2023



Outdoor recreation and sporting activities remain popular, but it will become increasingly important for brands and retailers to combat barriers to access.



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Automotive Analyst



Outdoor Recreation & Sporting Activities - US - 2023

This report looks at the following areas:

- Consumers' outdoor recreation and sporting activity participation and interest
- Participation frequency and locations
- Influential sources and primary motivations
- Attitudes toward outdoor recreation and sporting activities

Overview

Outdoor recreation and sporting activities are incredibly popular, with a staggering 83% of consumers participating in at least one such activity. A significant portion of these participants, a noteworthy 55%, engage in these activities on a weekly basis – highlighting their importance in consumers' lives. Looking ahead, consumers – especially younger consumers – are expected to continue participating in these activities and even explore new ones. While this is a positive sign for the category, it also means that brands and retailers must find unique ways to stand out from their competitors. One effective approach is to emphasize affordability and accessibility, as these factors play a pivotal role in attracting consumers. Additionally, highlighting the mental health benefits associated with outdoor activities is a powerful message that will resonate – and align with – consumers' motivations.



Outdoor recreation and sporting activities remain popular, but it will become increasingly important for brands and retailers to combat barriers to access.

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Report Content

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Consumer trends: key takeaways (cont'd)
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

- Consumer fast facts (cont'd)

Outdoor activity participation

- Outdoor activities are widely popular
 - Graph 1: outdoor activity participation, 2023
- Running, walking are a driving force in participation
 - Graph 2: type of outdoor and sporting activity participation, 2023
- Outdoor runners/walkers present cross promotion opportunities
 - Graph 3: type of outdoor and sporting activity participation, runners/walkers vs overall, 2023
- Consumers look to the experts, rely on specialty stores
 - Graph 4: attitudes toward specialty stores (% any agree), 2023
- Running, walking presents an opportunity across ages
 - Graph 5: type of outdoor and sporting activity participation, by age, 2023
- Consumers shop varying retailers for footwear
- Men remain the key consumer for most outdoor activities
 - Graph 6: type of outdoor and sporting activity participation, men vs women, 2023

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- Basketball leads the way
 - Graph 7: outdoor team sports participation, 2023
- Team sports participants seek more outdoor spaces, social opportunities
 - Graph 8: attitudes toward outdoor spaces and meeting people (% any agree), team sports participants vs overall, 2023
- Female participation signals opportunity
 - Graph 9: outdoor team sports participation, men vs women, 2023

Outdoor recreation & sporting activities interest

- Consumers are interested in a variety of outdoor activities
 - Graph 10: consumer interest in outdoor activities, 2023
- Women present a significant opportunity for growth
- Consumers are open to multiple outdoor activities
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Participation frequency

- Frequent and regular participants present opportunities
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- Limited concerns charge consumers' participation frequency and adoption
 - Graph 14: barrier-related attitudes toward outdoor activities (% any agree), by age, 2023
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 - Graph 15: participation frequency, by age, 2023
- Driving younger consumers' participation
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 - Graph 16: participation frequency, by household income, 2023
- REI expands its resale offering with more physical stores

Participation locations

- Consumers stay close to home
 - Graph 17: participation location, 2023
- The return of indoor activities presents a threat to outdoor activity participation
 - Graph 18: agreement with "I tend to participate in outdoor activities less often now that indoor activities are safer again", by age, 2023
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 - Graph 19: participation location, by age, 2023
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 - Graph 20: participation location, men vs women, 2023
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 - Graph 21: participation location, parents vs overall, 2023
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 - Graph 22: participation location, by area, 2023

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- Friends and family are a driving force to participation

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- Graph 23: influential sources, 2023
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 - Graph 24: influential sources, men vs women, 2023
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 - Graph 25: influential sources, by age, 2023
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Motivations

- Physical and mental health is a driving force in consumers' participation
 - Graph 27: reasons for participation, 2023
- Mental health, savings are critical for younger consumers
 - Graph 28: reasons for participation (select), by age, 2023
- Exercise is a primary motivator for older consumers
 - Graph 29: reasons for participation (select), by age, 2023

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- Corporate social responsibility appeals to multicultural consumers
 - Graph 31: attitudes toward outdoor brands, by race and Hispanic origin, 2023
- Partner with BIPOC organizations to drive engagement

COMPETITIVE STRATEGIES

- Wilson expands its retail brick-and-mortar retail presence
- Dick's Sporting Goods expands House of Sport stores
- PacSun launches dedicated activewear store
- PUMA, LaMelo Ball partner to refurbish local basketball courts
- Dick's Sporting Goods announces plans for SidelineSwap trade-in events
- Sketchers enters basketball and soccer market

Opportunities

- Partner with urban municipalities to develop outdoor-friendly areas
- Promote the mental wellness benefits of outdoor activities
- Demonstrate a tangible commitment to sustainability, inclusion
- Highlight access, affordability to diminish perceived barriers

THE MARKET

Market context

Market drivers

- Consumer confidence falls for fourth straight month
- Younger consumers present future growth opportunities
- Growing multicultural segments present additional opportunities
- Biden-Harris administration provides grants for green space

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and Terms

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This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by Kantar Profiles ([See Research Methodology for more information](#)).

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