



 HAVØRN
Outdoor Sports User Survey

Demographic

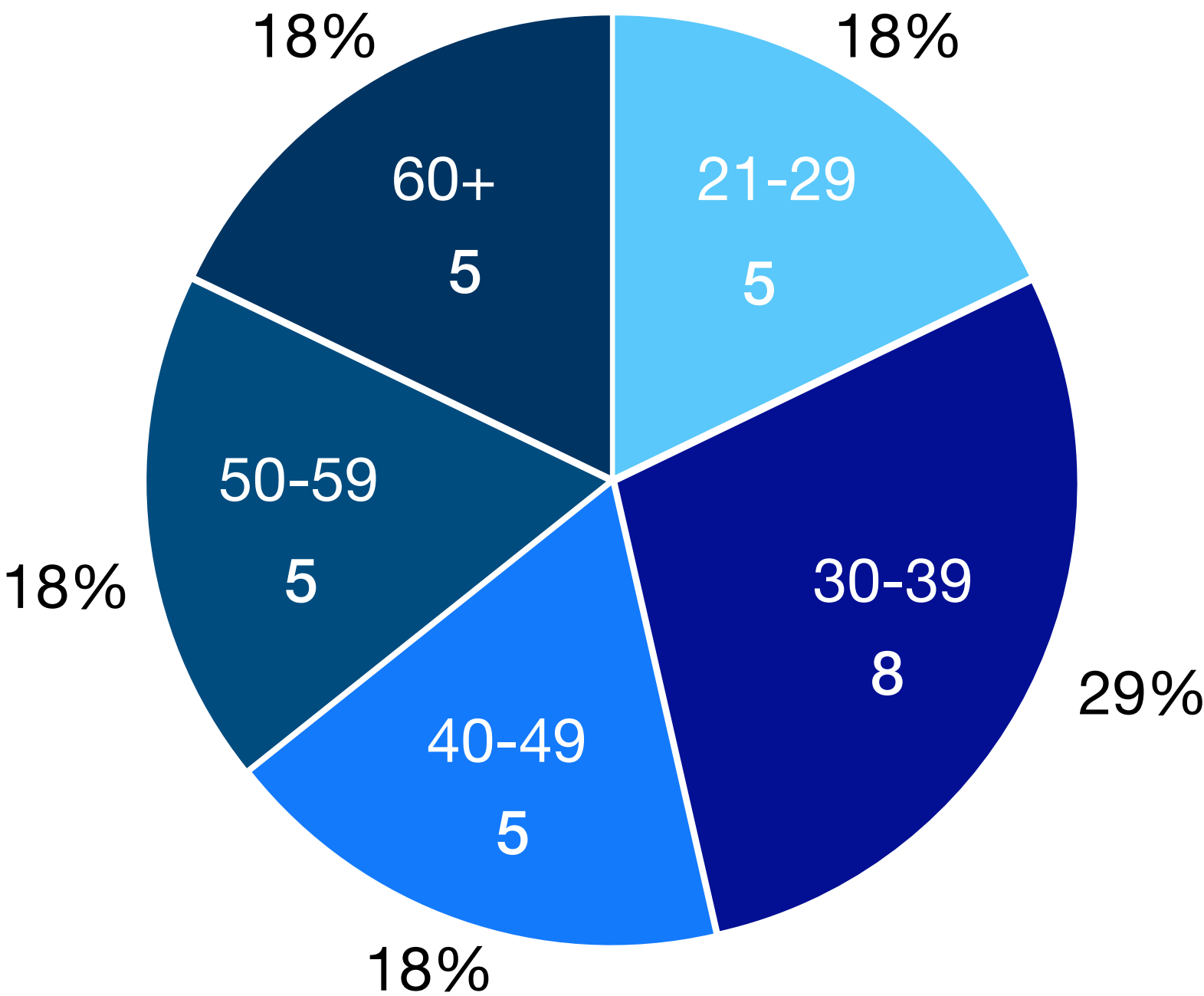
Survey was sent to members of a well-established climbing group residing in RI, CT, MA, and NY.

Participants age

The age of **28 participants** varies from someone in their twenties to over sixties, a quite diverse and healthy range for a survey. Many participants answered positively and gave in-depth responses.

Total
28
Participants

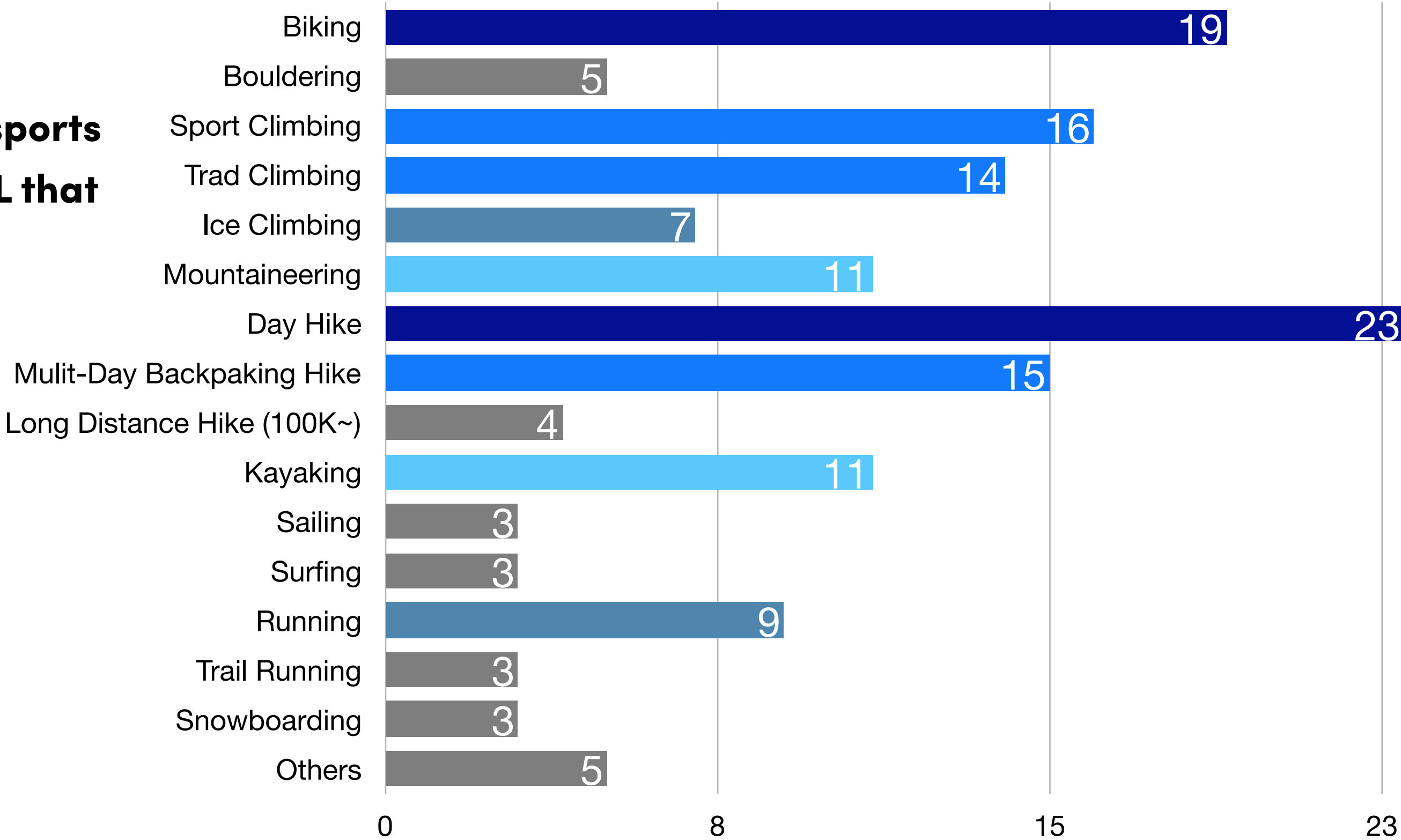
Q. What is your age group?



Outdoor Sports

The aforementioned climbing group members have strong interest in climbing indoor, outdoor, ice and rock. Thus, almost 80% choose some sort of climbing as their favorite activity. All participants enjoy at least one form of hiking either day-hike or multi-day. More than half of them do multi-day backpacking.

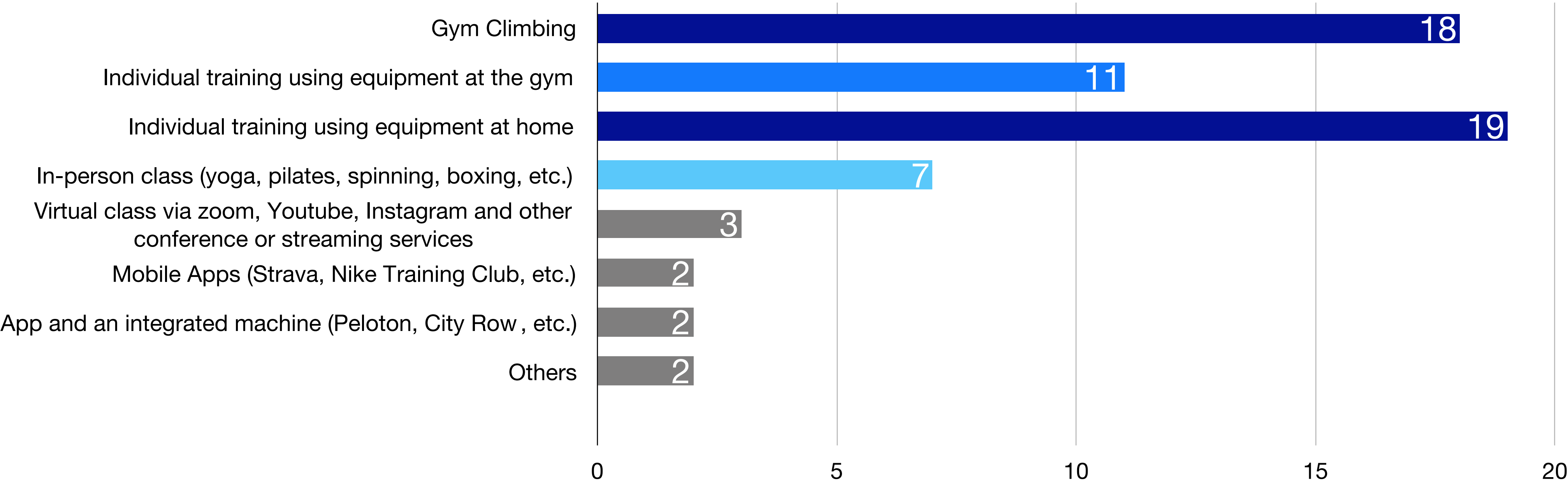
Q. Please choose the outdoor sports you enjoy the most. Choose ALL that apply.



Indoor Sports

Most participants go to the climbing gym and do individual training either at home or at the gym. Some participate in in-person classes.

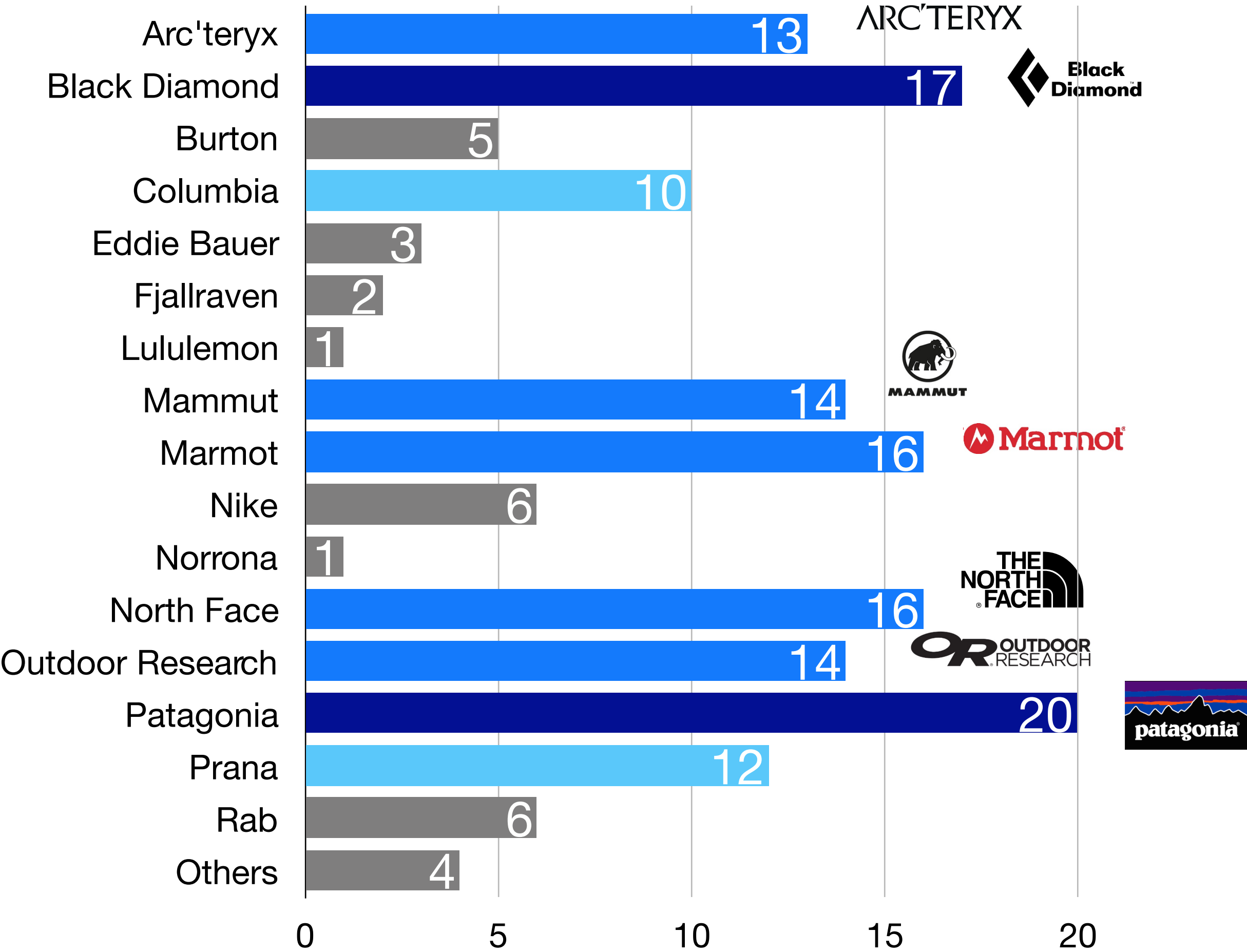
Q. Please choose indoor activities or training methods you do more often. Choose ALL that apply.



Brand Loyalty

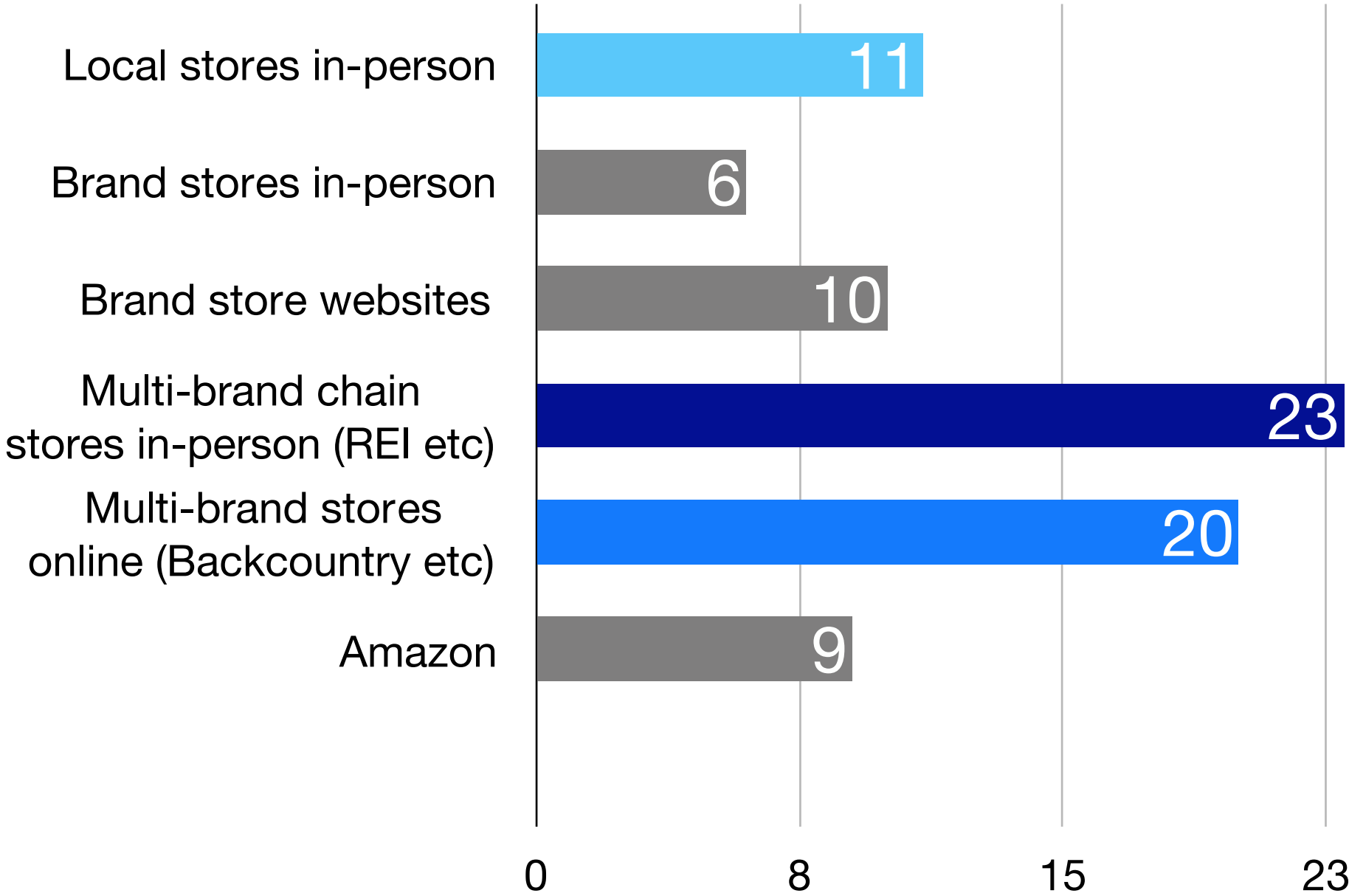
The participants demonstrated strong brand loyalty to **Black Diamond** and **Patagonia**, two brands originally founded by an accomplished climber, Yvon Chouinard.

Since the participants are mostly climbers, they were attracted to brands that are distinctive and specialize in purpose-built products for climbing and hiking. The price range of these brands tend to be much higher than that of multi-purpose sportswear brands.



Shopping Habits

Brand loyalty aside, they prefer to mostly shop at multi-brand chain stores. They either shop at independent stores to support local small businesses or at wholesaler / multi-brand stores for the lowest prices.



“ What I do many times is go into a brick and mortar store, try on or check out a product, then I buy it online from the site with the lowest price. That is the new business model.”

age 60+, RI

“ I usually look up the technical specs on the brand site and see if that is what I want. But I ask my favorite local store if they can order it for me. I feel bad buying them at wholesale stores or Amazon. I would be sad if they are gone. It may not be the lowest but they try to give me a good price.”

age 40 - 49, NY

Unless the brand is only sold at their site exclusively, I would not buy it on their website. I don't like the price and I don't like heavy marketing.

age 30 - 39, NY

At least 3 participants spoke to me afterward and expressed how they almost intentionally avoid buying at the brand store or brand website.

Q. If you use any digital content, which websites, YouTube channels, or mobile apps have you used most frequently for training or learning a sport? What do you like or dislike about them?

WEBSITE OR APP	MENTIONED	PROS / LIKES	CONS / DISLIKES / DIFFICULTIES
Youtube	7	<ul style="list-style-type: none">- Use them to find out new workouts- Specific skill videos	<ul style="list-style-type: none">- Sometimes difficult to ascertain if the workout will be suitable for me- Some have long intros
Mountain Project	4	<ul style="list-style-type: none">- Good for finding local routes- Partners forum- Discovering new routes	<ul style="list-style-type: none">- Anonymous irrelevant chatter on Mountain Project forums.- Bouldering should be separate.- Political arguments in forum is unnecessary.
American Mountain Guides Association (AMGA)	4	<ul style="list-style-type: none">- Written content is good, but the videos are better for visual learners and help avoid ambiguous language by showing the process, time involved, etc.	<ul style="list-style-type: none">- With any training or new skill, reading and watching videos is great, but practice is necessary. The frustrating about any on demand digital content is not being able to ask questions except through comments posts.
Alltrails	2		<ul style="list-style-type: none">- The less popular trails don't have many reviews or images. Need check out the official government park website to figure out if the trail is open or closed, what amenities are available, fees, and etc.

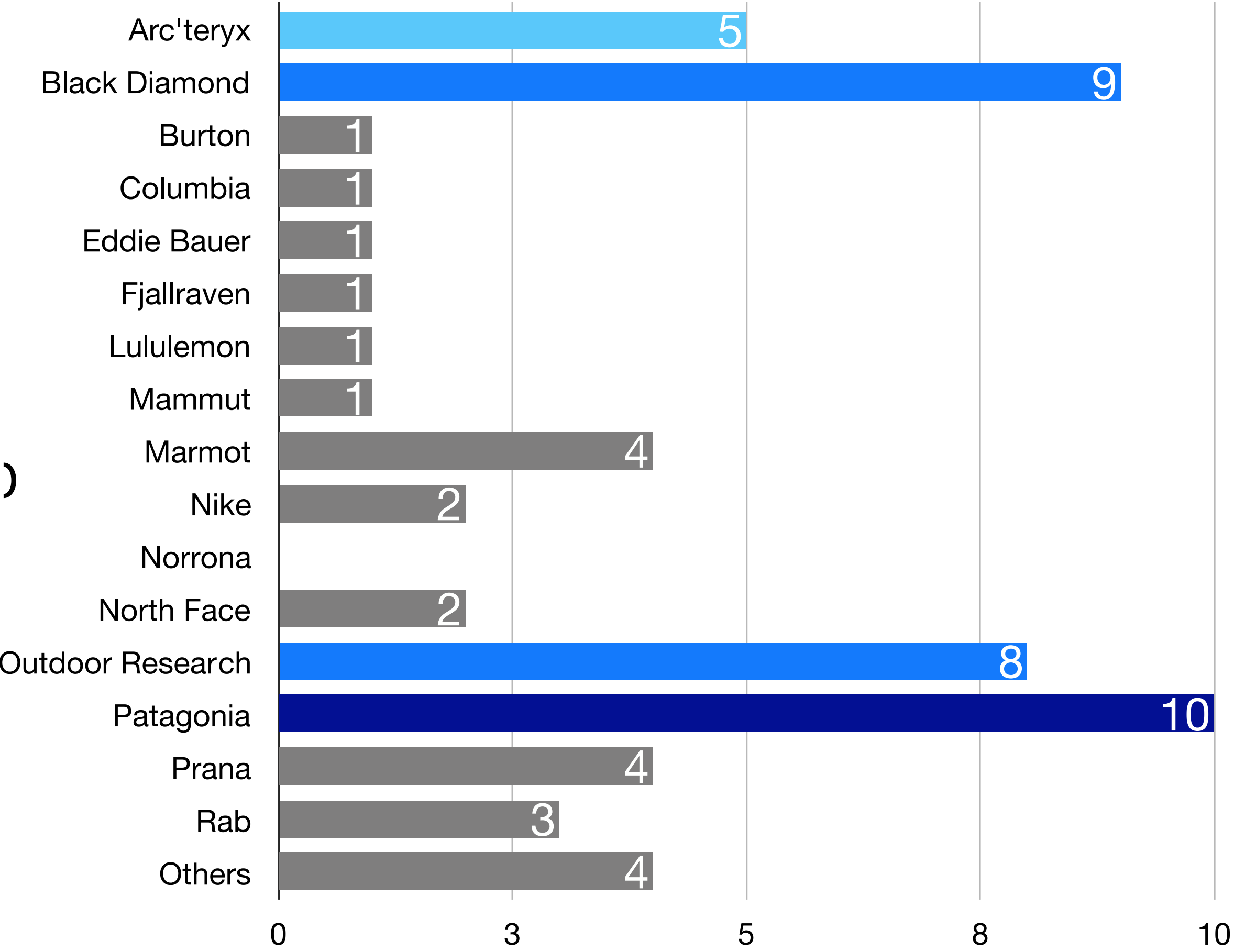
Q. If you use any digital content, which websites, YouTube channels, or mobile apps have you used most frequently for training or learning a sport? What do you like or dislike about them?

WEBSITE OR APP	MENTIONED	PROS / LIKES	CONS / DISLIKES / DIFFICULTIES
Wide boys (YouTube Channel)	1	<ul style="list-style-type: none">- Very detailed content on technique and training and how they impact your performance.- They break down each type of crack climbing technique and give tips for adjustments and everything. I love them.	
Caltopo	1	<ul style="list-style-type: none">- Shows you to plan your hike. It also allows you to share your hikes and to discover other hikes in the area.	<ul style="list-style-type: none">- Learning how to upload and edit GPS tracks.
Aim Adventure University	1	<ul style="list-style-type: none">- The information helps start a training regimen	<ul style="list-style-type: none">- It isn't any different than what's available for free on YouTube. There is no feedback on progress.
Fitnessblender	1	<ul style="list-style-type: none">- Good content, quality free options in addition to flexible pay options for premium	

Other websites and apps mentioned only once : MapMyFitness, Aaptiv, Magic Seaweed, Surfline, Strava, Nike Training App, Peloton.

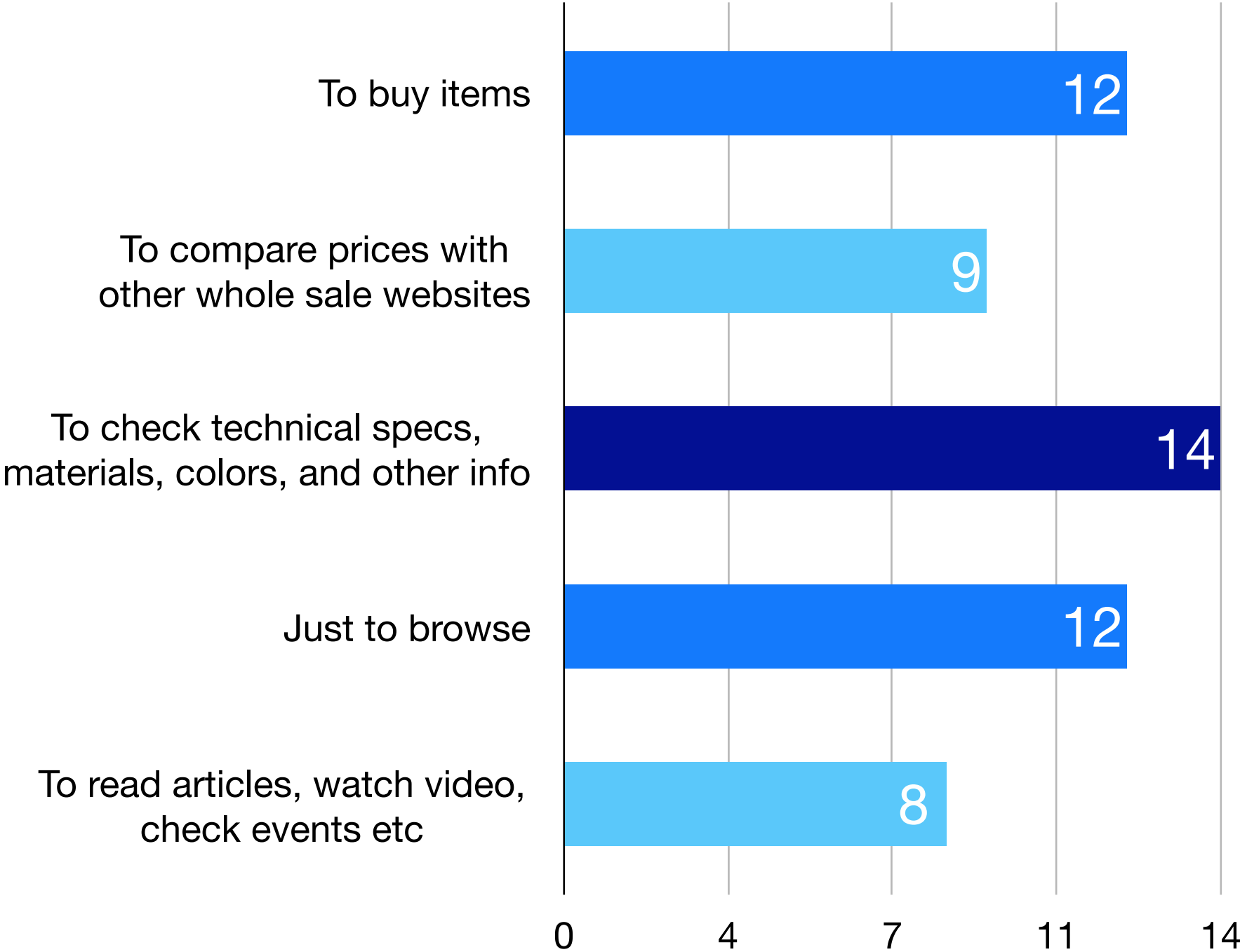
Brand website use

**Q. Have you visited their brand website lately? Choose ALL that apply.
(EXCLUDE multi-brand stores and
wholesale such as REI, Backcountry, etc.)**

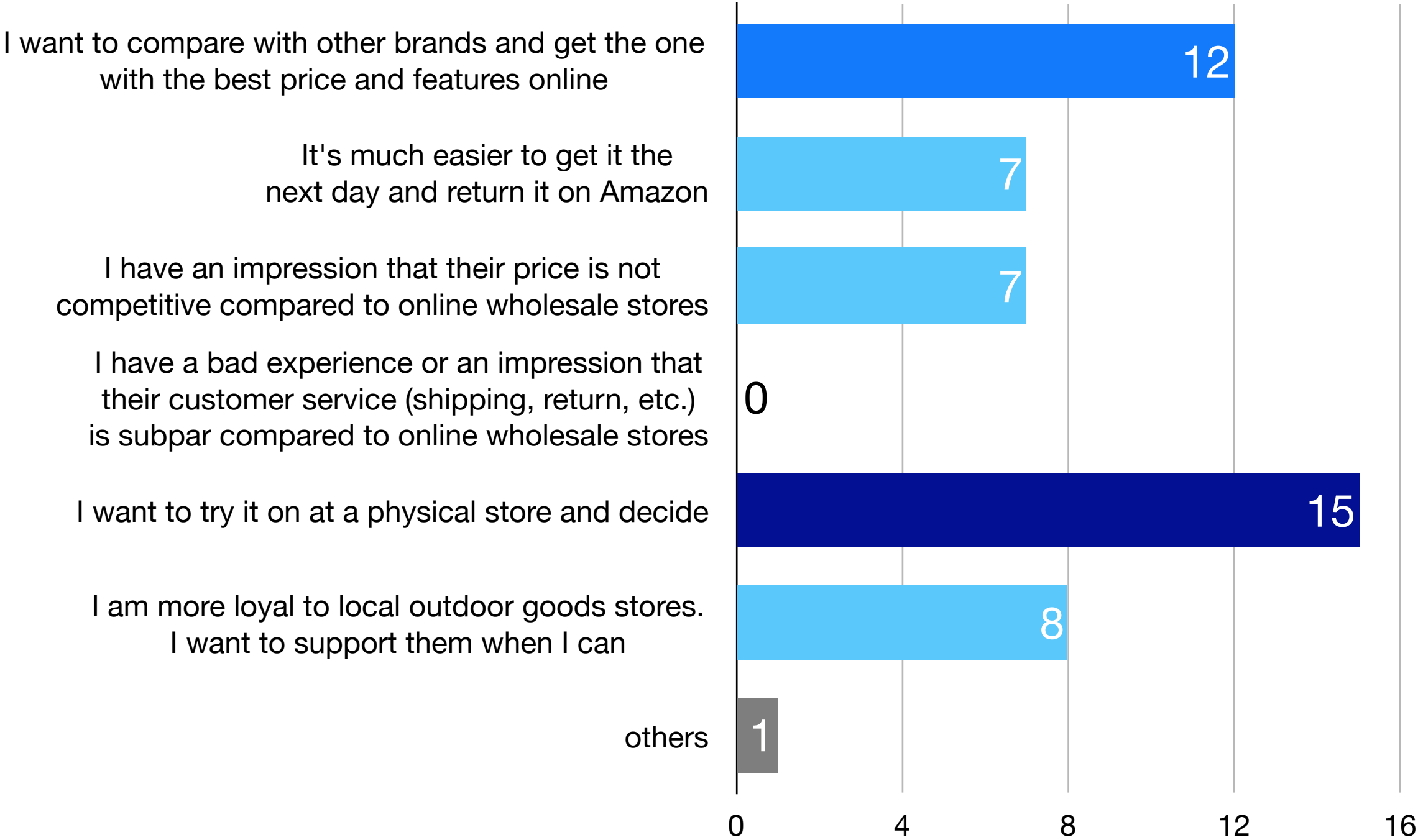


Brand website use

Q. What were the reasons to visit the brand stores?



Q. Tell me the reasons why you would NOT buy on the brand store websites (UP TO 3).



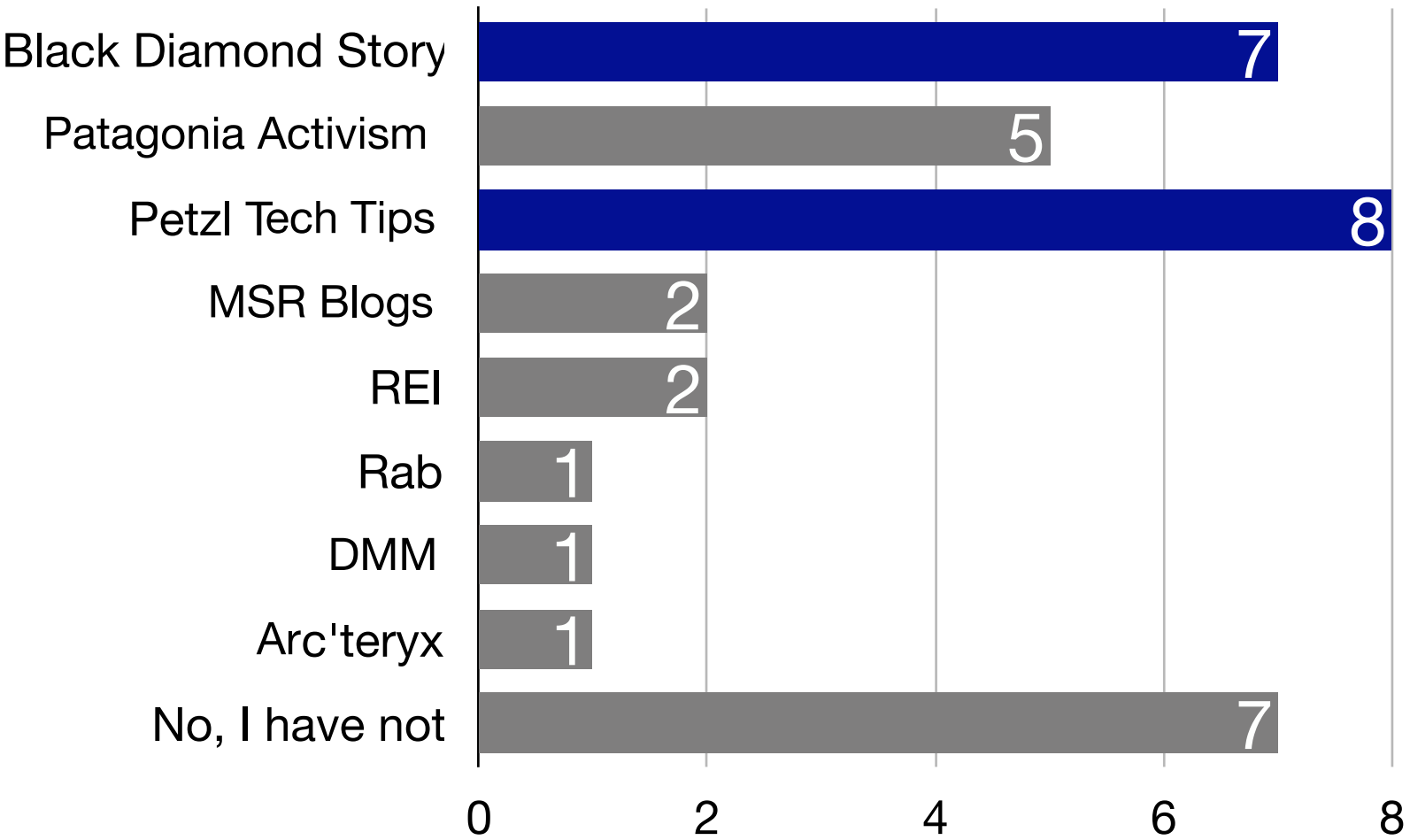
Using brand websites as a knowledge base

Some Intermediate to advanced climbers and hikers seek information on websites other than shopping. Among many sites mentioned, Black Diamond Story and Petzl Tips stood out. All participants who visited these two specific site sections chose trad climbing as their main hobby. 7 out of 22 people said they never visited these sites.

Patagonia Activism attracted a mix of climbers and non-climbers. Out of four young people (21-29), two have never looked at these bespoke contents, while the other two only listed REI and Patagonia Activism. It is not clear why young people prefer short introductory content over in-depth analysis articles. It could be that they are: not dedicated to that sport; financially not capable of spending on an expensive sport; prefer to do a little bit of everything, or are not interested in long contents in general.

Interestingly, this age group also do sport climbing or bouldering, but not trad climbing which requires a high initial investment financially and time. Instead, they have chosen a wide variety of water sports and other less committing sports.

Q. Have you ever looked at events, training, articles, or videos on brand websites other than for shopping for clothes?



I mainly look at events that are centered around races, but I have been enjoying the content the outdoors industry has put into spotlighting the native lands and the true names of the land we are occupying as outdoorsmen."

age 30 - 39, NY

Using brand websites as a knowledge base

Q. If you have ever looked at events, training, articles, or videos on brand websites, what did you dislike ?

"Everything seems for the wannabe 5.12 climber. I'm looking for adventures that I could do at the mid-level experience."

about BD; 40-49 yo

"Sometimes confusing info"

about Petzl; 60+ yo

Black Diamond and **Petzl** provide in-depth instruction of technique, and analysis of materials. They seemed to be quite popular for some climbers.

Q. What did you like ?

"Topical, objective information from experts and high-quality contents from pros"

about BD, Petzl; age 30 - 39

"Specific, concise instructions and videos."

about BD, Petzl, DMM; 50-59 yo

"I love the latest articles and events. I really enjoy the classes and events offered by REI. Love how to videos"

about REI; 21-29 yo

"Very specific training links. Lots of photos for each step. Detailed and easy to understand/follow"

about Petzl; 30-39 yo

"Great backstory and lifestyle stories"

about Arc'teryx YouTube; 60+ yo

"Tech testing and videos excellent on Black Diamond and Petzl"

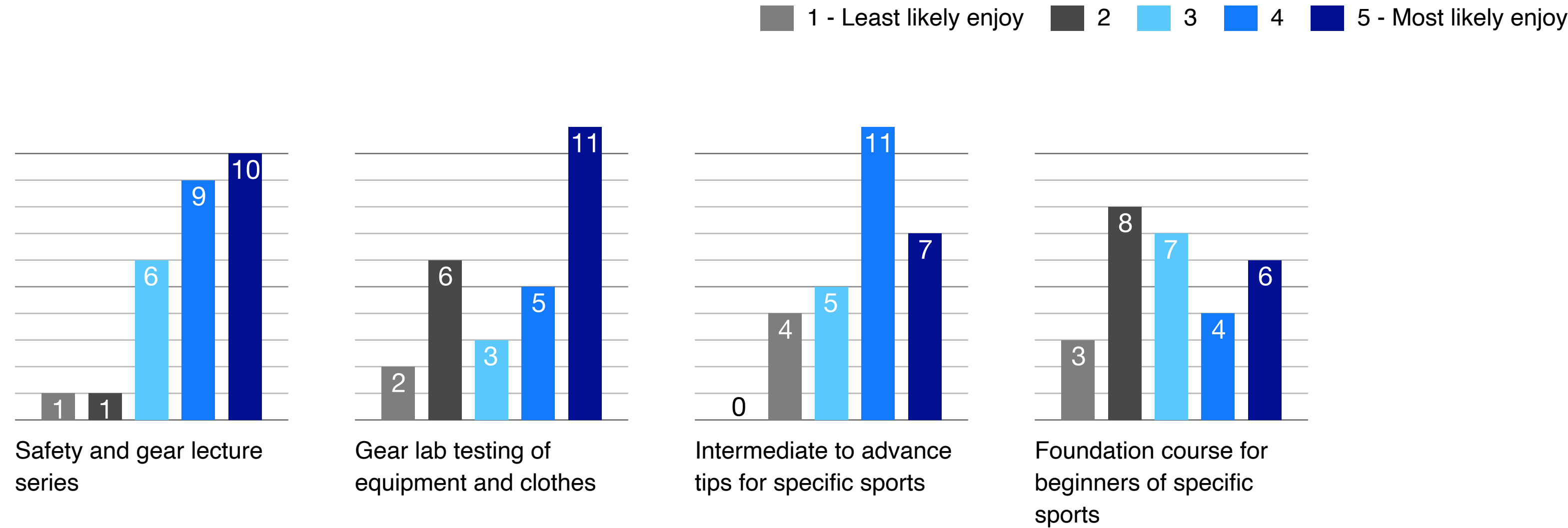
about BD/Petzl; 60+ yo

Using brand websites as a knowledge base

Q. For both yes and no, what can they improve so that you would be more interested?

<p>"I think the depth to the articles would help, Often narratives by Andy Kirkpatrick have a sense that there is an adventure narrative, and that there is play in it."</p> <p>age 40 - 49</p>	<p>"Well shot, compelling stories with appealing, interesting professionals"</p> <p>age 40 - 49</p>
<p>"Update more frequently."</p> <p>Age 21-29 yo</p>	<p>"I usually get my tips through videos, so having a good Youtube channel would probably help. I do remember that I would watch several REI gear videos when deciding which product to buy."</p> <p>21-29 yo</p>
<p>"Less confusion"</p> <p>Age 60+ yo</p>	<p>"More quick videos"</p> <p>21-29 yo</p>

Strong interest in self-improvement, safety, and gears

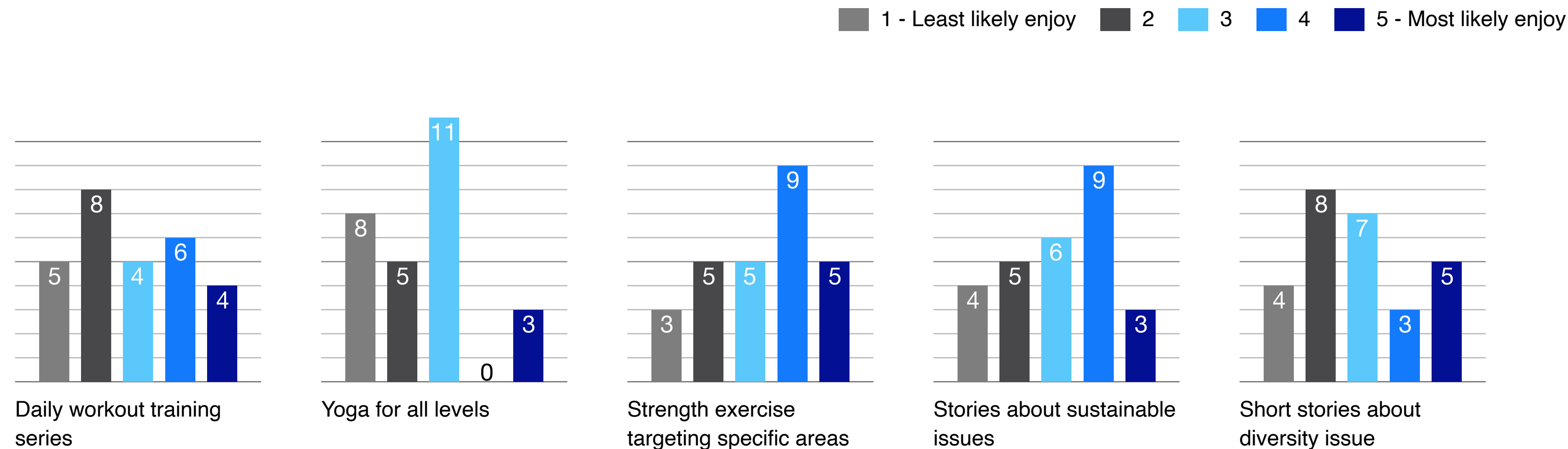


Q. What type of video content would you be interested to see in brand websites?

ALL participants rated highly on the content “intermediate to advanced content for specific sports”.

The overwhelming majority rated contents with safety, gear and testing equipment as something they would most likely enjoy.

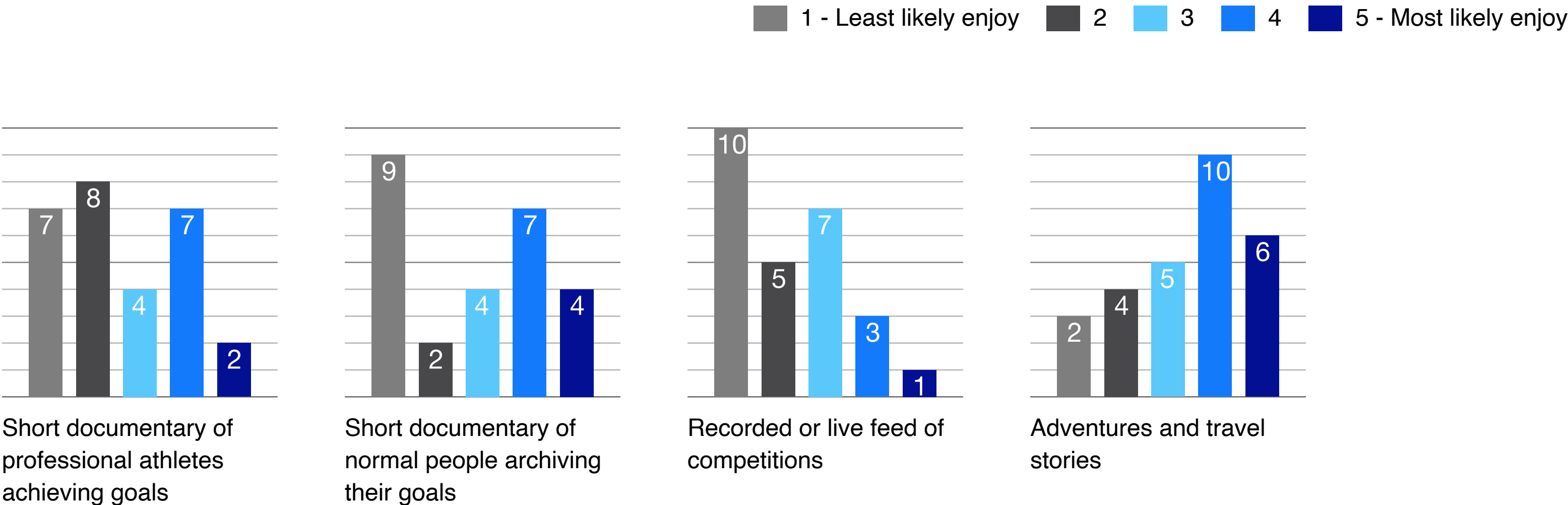
Neutral on contents that are geared toward beginners and wider audience



Q. What type of video content would you be interested to see in brand websites?

Participants are neutral on contents that are more geared toward a wider audience such as yoga and daily workout; however, they would be slightly more interested in something like strength exercises that may help specific areas.

Generation gap in what considered being relatable



Q. What type of video content would you be interested to see in brand websites?

The upper range of millennials, 30-39 years old, want to see more normal people as much as (or in place of) professional athletes on video. Those even younger (Gen Z) mostly did not care about either choice but gave high points on the foundation to advanced courses for specific sports. The younger the participants were the less interested in consuming the experience of others, but instead very eager to learn and enrich their own outdoor lives.

Video vs Written Contents

Q. What type of content you would prefer to be written words with some pictures instead of videos ? -
Example: I like watching yoga video but prefer to read camping recipes.

Technical data about items and objects like weight, size, dimensions, strength limits.

I like reading informative user reviews about trails and campsites. It's condensed compared to a watching a random video snippet.

Clothing and gear. When it comes to tech tips, sometimes I like all three. Close up photos or video shots are a must. Also, some video tech tips go too fast or don't provide a clear view of what is happening, which can be confusing. Those that slow down and zoom in on an important new skill demonstration are the best.

Exercise training best on videos. Long form adventure stories I prefer in written form with pictures.

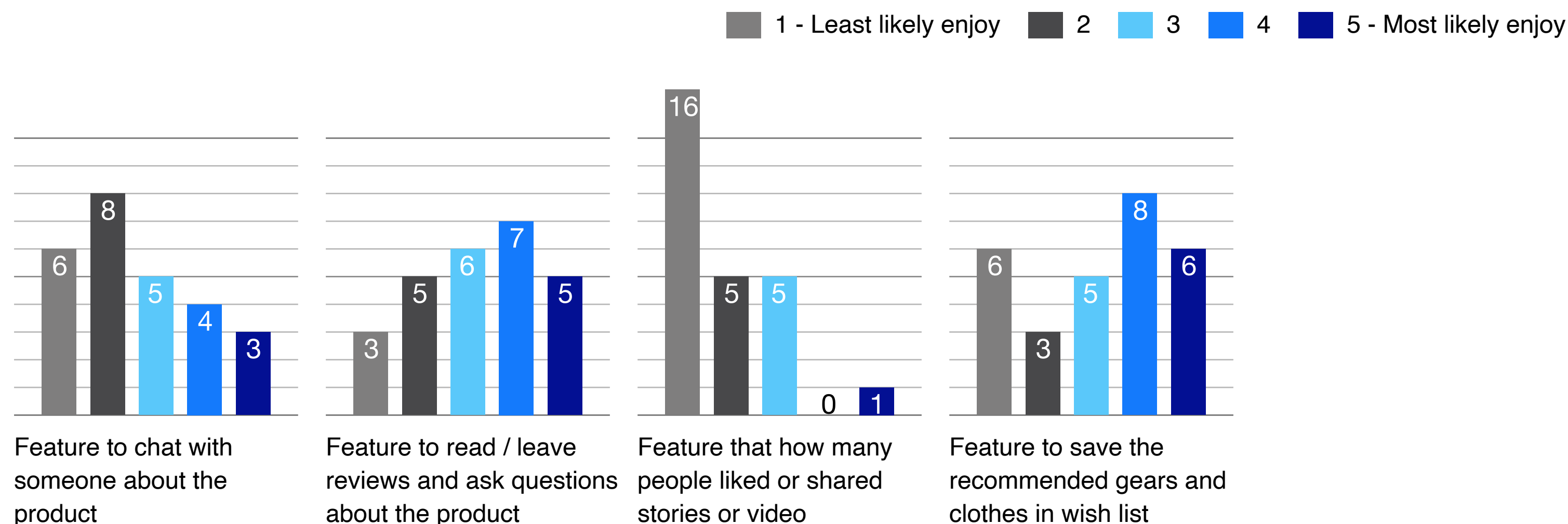
Gear reviews are better as articles

I like listicles and gear roundups best in the written word, especially as content has been video-first for about three years now.

I think most things could benefit from a mix of text and video/photos

A lot of people prefer to read articles, specifications and reviews in written format, while skills and training and are preferred on video.

Social media backlash: high number of “likes” is not important ?



Q. What type of features would you be interested to see in brand websites?

Regardless of their age, people are strongly opposed the “like” feature for the videos or stories, which could be a backlash of social media. The same participants still like to read reviews and Q & A for the products.

Insights

- **People prefer to shop at multi-brand stores and websites for the lowest prices**
- **Strong brand loyalty based on sports-specific products design and quality**
- **Strong interest in self-improvement, safety, and gears**
- **They use brand websites to learn about techniques and safety of the sports as well as to buy the products**
- **People enjoy reading stories and watching videos about the environment, social issues, and adventures**
- **Less about consuming the experience of others, more about enriching their own**