WEARABLE TECHNOLOGY:
Changing Outdoor Behaviors Bring New Opportunities

SEPTEMBER 2014 // SOCIAL MEDIA LISTENING ANALYSIS

market + consumer insights

OUTDOOR INDUSTRY ASSOCIATION
There is a direct and immediate relationship between physical exercise and individual happiness and well-being measures. We have found that a holistic approach to contemporary health and well-being would benefit significantly from the inclusion of personal health tracking. We have also demonstrated that technology-based solutions are significantly more effective than traditional techniques in driving positive healthy behaviors.”

2014 Fitbit Healthy Futures Report
Technology has long been viewed as an impetus for escape in the outdoors. But in today’s digital culture, the relationship between technology and outdoor has greatly evolved for the vast majority of participants.

Not only is technology no longer the enemy of outdoor, it is in fact just the opposite for many consumers who are using it to enhance their outdoor experiences. Technology is commonly being used today to elevate outdoor activities by providing an added layer of entertainment, motivation or security to the experience.

Whether you view technology as a friend or foe of outdoor, the increasingly integral role it is playing in outdoor experiences cannot be denied and should not be ignored. The growing world of technology in outdoor presents great opportunities for the outdoor industry to attract a new market of consumers who, while their behaviors may not align with traditional views, want to enjoy and participant in the same outdoors we all know and love.
CHANGING OUTDOOR BEHAVIORS

While the outdoor industry is in the throws of major change from shifting consumer demographics, evolving business models and technology-ingrained lifestyles, there are aspects to this new reality that create opportunities for the industry to build a whole new generation of outdoor consumers. One such opportunity is the growing population of connected outdoor consumers empowered by the wearable technology revolution.

The ways that consumers want and choose to engage in outdoor recreation is far more varied today than in the past, and their behaviors continue to evolve. According to the 2014 Outdoor Participation Report, there was a 32% increase, from 2012 to 2013, in Millennials fitness monitor use in outdoor recreation. They are also engaging in a broader range of activities versus trying to master a single one. Their motivations for getting outdoors run the gamut from fun and social collaborative experiences to competitive and adventurous solo ones.

And the new definition of outdoor is not nearly as rigid as most within the industry would define it. The lines between fitness, active, performance and lifestyle all blur together in outdoor experiences, and technology is now an inherent part of most of those experiences.
WEARABLES THAT CAN BASE-LINE SPORT PERFORMANCE AND FITNESS ACTIVITY THEN PROVIDE INDIVIDUALIZED FEEDBACK TO PUSH TOWARDS IMPROVEMENT WILL DRIVE A TREND TOWARDS INDIVIDUALIZED, CUSTOMIZED EXERCISE PLANS. IT’S NO LONGER ENOUGH TO MEASURE AND PROVIDE STATS, WE NEED TO PROVIDE COACHING, FEEDBACK, GUIDANCE OR ALERTS.”

Stacey Burr, VP Wearable Sports Electronics, Adidas
WEARABLE TECHNOLOGY IN OUTDOOR

Portable technology is not new to outdoor, as products like Garmin’s and Magellan’s GPS handhelds, Go Pro’s cameras, and Suunto’s sport watches have a long history within the industry. However, advancements in wearable technology have fueled tremendous growth in recent years. Portable/wearable technology brands exhibiting at Outdoor Retailer have grown from 31 exhibitors to 74 in the last four years.

The growth of the category is attributed, in large part, to the heightened consumer need and desire for health and wellness. In this age of more, better and faster, consumers are increasingly monitoring and striving to improve key aspects of their lives, from how many calories they burn, how active they are and how they sleep to how they can perform better and live a healthier and more active lifestyle.

A recent Accenture study found that more than half of all global consumers interested in wearable technology are specifically looking to track physical activity and manage their personal health.
ONLINE CONVERSATION OF WEARABLE TECHNOLOGY

The consumer-driven conversation in social media about wearable technology and associated mainstream brands (Fitbit, Jawbone, FuelBand, Google Glass, etc.) is composed of 10 million total mentions from August 1, 2012 – August 1, 2014.

Health and fitness applications of wearable technology make up a large portion of this conversation with over 5 million consumer-generated mentions. Outdoor-specific usage accounts for 10% of the overall conversation, with consumers identifying wearable technology devices as an entry point to more and greater outdoor recreation activity.

Supporting Sound Bites

“I love my fitbit that I got for Christmas. It is motivating me to exercise and just be more active even outside.”

“I started super slow and eventually got a Jawbone Up24 to track my steps. I have found that long walks outside actually boost my mood.”

“My Fitbit gal pals have started a new weekly challenge. This week’s challenge was to do something new outside.”
THE KEY TO SUCCESS IN THIS AREA IS CREATING SOMETHING BECAUSE IT IS NEEDED OR DESIRABLE, NOT SIMPLY BECAUSE IT IS POSSIBLE.”

Apparel Magazine
Wearable technology is a technology application worn by consumers for the purpose of tracking and monitoring conscious and unconscious states, as well as enhancing everyday experiences. Wearable technology is a booming industry. With over 10 billion devices currently available, it is expected to exceed $1.5 billion in 2014. This is projected to grow to 50 billion devices by 2020, making it a $1.9 trillion dollar industry.

In the health and fitness category, the empowerment that wearable technology provides is redefining consumer lifestyles and pushing people to challenge their own physical, mental and emotional capabilities.

In 2014:

- $1.5 Billion Industry
- 10 Billion Devices
In 2013, 60% of the wearable technology market was attributed to sport and activity trackers,* as people looked for more transparency into their abilities and performance.

On the constant track of evolution with technology, the bar continues to rise in terms of consumer expectations from these performance-tracking devices. Today, consumers look beyond need fulfillment to need anticipation with products that have foresight capabilities and seamlessly integrate into their lifestyle, routine and health and fitness goals.

It’s about regaining a sense of control – once people start becoming cognitively aware of the choices they make and the impact it has on their body, they realize how much power for positive change they have.”

LARRY SMARR, DIRECTOR, CALIFORNIA INSTITUTE FOR TELECOMMUNICATIONS AND IT

*SOURCE: JUNIPER RESEARCH
THE EVOLUTION OF WEARABLE TECHNOLOGY

The origin of wearable technology is grounded in a larger technology trend, the Internet of Things (IoT), which has fueled a cultural revolution that, not long ago, only seemed possible in science fiction. The IoT, merging the digital world with the physical one, is a movement in innovation where intelligent sensor devices are embedded into products and can communicate with other products and humans. It is currently impacting a multitude of industries, but with continued advancements in wearable technology, the health and fitness category is the vanguard of the IoT movement.

In reality, wearable products have been around for decades, but it is only recently that they have become more mainstream and “fashionable.” The term was originally coined in the 90’s and commonly used in the medical field with the likes of hearing aids and pacemakers.

One of the earlier mainstream companies to make a move into the wearable space was Adidas. In 2008, they introduced a personal coaching system by collecting relevant data, like heart rate, from embedded sensors in sports bras and vests. This groundbreaking technology evolved beyond the proof-of-concept stage to products worn by consumers.

Moving far beyond pedometers and heart rate monitors, today’s more advanced products include sleep trackers, augmented reality eyeglasses, headbands for monitoring brain activity, concussion sensors nestled within a helmet, sensor-guided canes for the blind and smart t-shirts for soldiers in the battle field. Current wearable products strive to be more integrated, seamless, transparent, comfortable, useful, reliable and practical compared to earlier versions. Overall, wearable technology appears to be on a fast track toward ubiquity.
## A BRIEF HISTORY OF **WEARABLE** TECHNOLOGY

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1961</td>
<td>a wearable computer</td>
<td>MIT mathematics professor Edward Thorp created and successfully used the first wearable computer – to cheat at roulette (though it was not illegal at the time of invention). Thorp and co-developer Claude Shannon found that the device gave the wearer a 44% edge in the game.</td>
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<td>1975</td>
<td>calculator wristwatch</td>
<td>The Pulsar “Calculator” wristwatch – the world’s first wrist calculator – was released to the public in late 1975, instantly gaining popularity with the tagline, “For the man who had everything until just now...”</td>
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<tr>
<td>1981</td>
<td>computer backpack</td>
<td>High schooler Steve Mann wired a 6502 computer (as used in the Apple II) to a steel-framed backpack to control photographic equipment. The device’s display was a camera viewfinder attached to a helmet.</td>
</tr>
<tr>
<td>1994</td>
<td>wearable wireless webcam</td>
<td>Thirteen years after inventing the wearable backpack device, Steve Mann created the Wearable Wireless Webcam and began uploading images to the web, until 1996. According to Mann, the project is perhaps the second camera to appear on the web. Many believe Mann to be the first “lifelogger.”</td>
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<tr>
<td>2003</td>
<td>C-series</td>
<td>The Vitatron C-Series was the world’s first fully digital pacemaker. With the device, clinicians can download patient information in just 18 seconds.</td>
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<tr>
<td>2007</td>
<td>Fitbit</td>
<td>Fitbit was founded by James Park and Eric Friedman. According to Park, difficulties in manufacturing nearly caused the company to go under seven times. Its first product wouldn’t launch until 2009.</td>
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<tr>
<td>2012</td>
<td>the Pebble</td>
<td>The Pebble customizable smartwatch came to Kickstarter and made over $10 million on a goal of only $100,000. Pebble Steel, the second-generation device, was noted for being much more fashionable.</td>
</tr>
<tr>
<td>2013</td>
<td>Google Glass</td>
<td>Google Glass was released to developers in 2013, starting a media frenzy, as well as backlash involving privacy concerns. Glass is controlled through voice recognition software and a side touchpad.</td>
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**SOURCE:** MASHABLE
IN THE NEXT FIVE YEARS WE WILL WITNESS THE RAPID DEVELOPMENT—AND MAINSTREAM ACCEPTANCE OF—WEARABLE TECHNOLOGY THAT INTEGRATES INTO EVERY ASPECT OF OUR LIVES. WEARABLE TECHNOLOGY WILL BE USED TO HELP RECORD THE WORLD AROUND US, NUDGE US INTO ACTION, COMMUNICATE INFORMATION BETWEEN ONE ANOTHER, ALLOW US TO CONTROL OUR ENVIRONMENT, VERIFY WHO WE ARE AND REFLECT OUR WELL-BEING BACK TO US.”

Piers Fawkes, Founder & President, PSFK Labs
SOCIAL MEDIA CONVERSATION METRICS
The transition of wearable technology becoming mainstream is reinforced by the significant increase in conversation volume online with 10 million total mentions in the last two years and a 53% increase in conversation year-over-year. The conversations spiked at the beginning of the year as New Year’s resolutions heighten consumer motivations related to health and fitness.

Supporting Sound Bites

“I think for my tech predictions that wearable technology will be big this year. It’s something that really interests me and I can’t wait to see how they change the tech industry.”

“I want a Fitbit activity tracker! My resolution was to be more active and lose weight. This would help!”

“After a long day of running around I went back outside just to get badges. The Fitbit is powerful.”
The overall conversation sentiment is highly favorable as consumers embrace this new technology and the lifestyle enhancements it offers. The larger positive sentiment is driven by the emotional value the devices provide and their ability to seamlessly integrate into consumers’ lives and monitor various aspects of health and activities to help reach personal goals.

As wearable technology becomes more established within our culture, consumers are starting to look beyond the initial excitement to some of the more practical realities of its use. The small amount of negative conversation that currently exists focuses on tracking inaccuracies, app user interface issues, data ownership and privacy concerns.
The gender-specific conversation online about wearable technology has clear distinctions. Males own the majority of the online conversation and tend to talk more about specific attributes of the products. They have a strong rational interest in the technical aspects, such as physical product performance and functionality.

Females comment with more of an emotional connection to their devices and praise their abilities to compliment their personal interests, activities and goals. Females also have a stronger desire for better product aesthetics, as they view the devices as accessories in addition to functional.

Supporting Sound Bites

“Of course the Fitbit gives the option for different colored bands, let’s be honest, a plastic watch looking thing doesn’t really go with any of my outfits outside of cross-trainers and sports bras, regardless of the color.”

“My husband calls me a “Fit-Wit” - I LOVE my Fitbit. It is very motivating and addicting, but that is a good addiction, a healthy one.”

“The fitbit seems to be pretty accurate in tracking stats. Some of my favorite features include the silent alarm, sleep tracker, software, app, personalization with your goals, step tracker, long lasting battery, and the fact that it also syncs with my other apps, such as myfitnesspal.”

“Not to be cynical, but there are endless ways to become attuned to your body that don’t require some kind of digital health tracker.”
"Anyone who is serious about changing their lifestyle to a healthier one, knows the benefit of having some support mechanism. Fitbit One provides that support. I like the fact that it slips into my pants pocket, is completely concealed and no one knows it is with me and working 24/7."

“Even better this week - I achieved the Sonic Boom trophy with my Nike+FuelBand. #nikeplus.”

“the Jawbone UP’s graphics are more appealing than FitBit. It made me want to use it more because the graphics really make you want to go out and get active.”
GEOGRAPHY

In looking at the geographic distribution of wearable technology conversation online, there is alignment with states that have health-focused populations. Consumers residing in the 25 healthiest states in America, according to the United Health Foundation, are collectively driving 66% of conversation as they discuss the integration of wearable technology into their health and fitness routines.

25 Healthiest States in America

1. Hawaii
2. Vermont
3. Minnesota
4. Massachusetts
5. New Hampshire
6. Utah
7. Connecticut
8. Colorado
9. North Dakota
10. New Jersey
11. Nebraska
12. Idaho
13. Oregon
14. Washington
15. New York
16. Maine
17. Wyoming
18. Iowa
19. Rhode Island
20. Wisconsin
21. California
22. South Dakota
23. Montana
24. Maryland
25. Alaska

SOURCE: 2013 AMERICA’S HEALTH RANKING, UNITED HEALTH FOUNDATION
SOCIAL MEDIA SHARE OF VOICE
and the 25 Healthiest States
While wearable technology has inherent appeal to the digitally-driven Millennial generation, the majority of consumers talking about their devices online are from Generation X, making up 58% of the total conversation.

**Millennials:** Born between 1977 and 1994 (ages 20 to 37)
**Gen X:** Born between 1965 and 1976 (ages 38 to 49)
**Baby Boomers:** Born between 1946 and 1964 (ages 50 to 68)

When looking at the conversation by generation, clear differences in the motivations for usage of wearable technology become apparent and provide insight into how its appeal aligns with different life-stage needs.
MILLENNIALS: SOCIAL

Technology, and its accessibility, has led Millennials and younger generations to expect instantaneous connection in all aspects of their lives. On average, Millennials check their phones every 10 minutes,* so from a social perspective, wearable technology gives them yet another outlet to stay connected with peers. It also allows them to share their “life well lived” activities and experiences in real-time with others.

Wearable technology devices like the Ringly ring speak specifically to Millennial’s need for constant accessibility and the ability to stay connected in any environment, but without always having to have their phone in hand. By syncing their smart phone to the device, Millennials can put their phones away and be alerted through color, sound or vibration when they’re getting a message, call and/or notification that needs their attention, as well as seamlessly respond or share their experiences in the moment.

“I wish that I had friends that used a Nike Fuelband. It is by far the best buy I have ever had and now I need some competition.”

“You do not have to have your phone to check your status, it’s conveniently located on the device itself. I’m very pleased with my Withings Pulse.”

“Google glass helps improve accessibility. This is because it makes it possible for individuals to interact online in real time.”

*KANA SOFTWARE, 2014 TECHNOLOGY STUDY
GENERATION X: PREDICTIVE

Generation X consumers look to wearable technology as a platform for monitoring performance, staying ahead of issues and proactively managing their health and well-being.

They want devices that not only monitor progress and ways to perform better, but also anticipate ways to enhance their current lifestyle, activities and performance.

Looking to fulfill this need, wearable technology brands like EmoPulse are already developing products that provide personal recommendations based on mood. EmoPulse’s Smile Bracelet features sensors that can pick up on the wearer’s stress, mood, diet and overall well-being. For example, after listening to streamed music during a workout or hike, the system will recommend more content based on user tastes and/or emotional responses, and the accuracy of the predictions will increase over time with continued use. This is just one example of how wearable technology is providing heightened experiences to consumers in a wide variety of applications, including outdoor activities.

Supporting Sound Bites

“The Fitbit is even better than what I had anticipated. I have found that it not only tracks your activity, but can track your food, blood pressure, glucose,and your weight...”

“the display proactively sends me data from time to time in order to help me move more.”

“Each day is so fun for me, as I try and beat my record from the day before. The fitbit has encouraged me to walk. Not only am I happy with it, so is my Doctor.”
BABY BOOMERS: PREVENTATIVE

Baby Boomers find value in wearable technology on a different level, as they leverage wearable technology to proactively address a health concern or potential health risk. These devices offer a view into their physical vitals that was previously only accessible through a doctor’s visit.

A practical application of this is Sensoria, a pair of sensor-embedded socks that not only tracks traditional fitness data (number of steps, speed and total distance, etc.), but also provides data about running form and technique. The socks monitor weight distribution and form of the feet while standing, walking and running. Using this data, it’s possible to identify poor running styles and prevent injuries before they happen. The partner app delivers simple advice about how to unlearn poor running tendencies. It can also benchmark and analyze performance to give sock wearers a clearer picture of how their performance improves in tandem with their technique.

“I'M 64 and have multiple medical issues including RA and have found the Fitbit keeps me motivated to keep moving...I think a Fitbit is a great investment in your health!”

“56 years old. My son gave me a fitbit for Mother’s Day. It has been very motivating in changing from a sedentary lifestyle to a much healthier one. I use it all the time.”

“I have an artificial hip, an artificial knee, and arthritis. I love my fitbit and think it is one of the best tools I have to keep me moving and getting healthier.”
Three core themes around consumer needs and expectations of wearable technology drive the online conversation. Beyond their rational and functional expectations, consumers are developing increasingly sophisticated and emotional relationships with these devices.
CONSUMER TO TECHNOLOGY: SHARED ACCOUNTABILITY

Many wearable technology users hold their devices accountable for not only strong product performance, but for playing a role in their personal performance and wellness. In fact, 71% of users claim that wearable technology has improved their overall health.* From a functional perspective, consumers expect their devices to be dependable and accurate with the data they provide and monitoring capabilities, so that they get a true read on activities, progress and physical state.

On an emotional level, these users feel a sense of shared accountability with their devices in relation to defining and achieving their physical goals. They want to be accountable to something beside themselves as a form of external motivation to push them to make healthier lifestyle choices or improve their overall performance. Additionally, they expect the technology to be accountable for keeping them honest and on target for reaching or going beyond their personal goals.

Wearable technology has changed the way we think about healthy living. With more efforts being put into understanding how our bodies respond to exercise, we’ll continue to see fitness technology educate all of us on how to live a more active lifestyle and take control of our own health. The technology won’t make us fit on its own, but it can monitor our efforts and motivate us to make better choices in our everyday lives.” SHANNON MILLER, PRESIDENT, SHANNON MILLER LIFESTYLE

*SOURCE: CENTRE FOR CREATIVE AND SOCIAL TECHNOLOGY, 2013 WEARABLE TECHNOLOGY STUDY
CONSUMER AS TECHNOLOGY: EXTENSION OF SELF

Other consumers view wearable technology as an extension of themselves. As part of the “quantified self” movement, where people are seeking self-knowledge through data, many are using wearable technology to provide a deeper level of understanding of themselves and their physical and mental well-being.

Enhancement of physical capabilities is another way the lines are blurring between consumers and technology. Some consumers are using the technology to augment their own abilities, limitations and interactions. The ability of some wearable technology to anticipate needs provides a more enhanced and dynamic human experience for the users.

However, personal privacy is a growing concern among consumers as they start to consider the implications of their transparency with personal information. Access to and ownership of data, and who has rights to it, are topics frequently discussed in the online conversation around wearable technology. According to a recent study, 31% of consumers say they are worried about their privacy with wearable devices.*

Wearable technologies are beginning to adapt their form and functionality to align with our unique set of needs. Whether customizing their design to fit the unique contours of a wearer’s body or responding to a user’s emotional state to offer highly personalized feedback, this new breed of devices allows people to better define their interactions with technology, while at the same time enabling more meaningful experiences.”

*SOURCE: TNS GLOBAL, 2013

Supporting Sound Bites

“You can’t improve what you can’t measure. Huge fan of the quantified self.”

“Wearable tech is an addiction, you feel augmented.”

“Wearable tech like Google glass raises interesting “right to privacy” questions. Big brother is one thing, I think we may be devolving that concept into “creepy dude is watching…and recording”.”
CONSUMER TO CONSUMER: ENABLER OF CONNECTION

For generations growing up in the digital age, the definition of human contact, support and interaction have evolved far beyond the physical realm. In support of that behavior, wearable technology devices are being used as an alternative platform to connect with others and supplement or replace in-person interactions. The growth of wearable technology’s virtual communities demonstrates the role technology is playing in connecting users and creating peer-to-peer relationships, which in turn heightens the emotional value of the devices.

With health and wellness-specific devices, the desire for connection is two-fold. Consumers want the ability to build relationships and stay connected with like-minded peers, no matter how far away they are. They also leverage the device’s virtual communities for guidance and reassurance to help reach and exceed their individual activity goals.

Wearable technologies promise an entirely new set of data points, resulting in a far more detailed understanding of consumers, their behaviors, and the drivers of those behaviors. These intricate details can identify the nuances between action and reaction (e.g. stress levels and movement) as well as provide specificities of a user’s location (indoor vs. outdoor spaces compared to just knowing the general vicinity).” WIRED (MAY 2014)

Supporting Sound Bites

“I track my food, I am slowly increasing my activity each day and the ability to do this with friends through the badges, friends status’s, etc. just make me feel more connected and in control.”

“My @fitbit helps me stay motivated and connects me to my friends.”

“It DOES make a big difference and as I lost weight it’s gotten easier. The Fitbit One is a great motivator. Community is great because you don’t have to interact but “friends” will cheer you on.”
**In Summary**

- **Health and fitness applications**, a key appeal of wearable technology, make up almost half of the online conversation about the category.

- **Wearable technology can be an entry point to outdoor recreation** and a motivation for increased activity in the outdoors.

- **Consumer sentiment about wearable technology is highly positive**, as they seek solutions that integrate seamlessly into their lifestyles.

- **Generation X and residents of health-oriented states** drive the wearable technology conversation in the social space.

- **Motivations for using wearable technology differ** across the generations—from Generation X looking to proactively monitor performance, Baby Boomers targeting potential health/fitness risks and Millennials wanting additional outlets for socialization.

- **Consumers’ relationships with wearable technology** are becoming increasingly complex and personalized. Expectations range from shared accountability in performance, to enhancement of physical capabilities and providing a platform for connecting with like-minded others.
OPPORTUNITIES FOR OUTDOOR
Like outdoor participation, motivations for using wearable technology range from performance to betterment to connection.

The inherent links between outdoor and wearable technology, from a consumer needs perspective, provide opportunities to deliver enhanced outdoor experiences as well as connect with a new generation of outdoor enthusiasts.

Market to a broader range of motivations for outdoor recreation to attract a new audience of wearable technology consumers.

Be relevant to wearable technology consumers by creating outdoor opportunities that deliver lifestyle experiences aligned with social interaction and health and wellness.

Look beyond the products and devices and leverage the emotional value of betterment in outdoor and wearable technology to connect with consumers.

Show us a consumer who doesn’t aspire to self-improvement. The drive to improve oneself can manifest itself in a number of ways, such as the desire for better health, for greater knowledge, and/or the development of new skills. Brands and products that satisfy these needs will therefore simply appear ‘better’ than those that don’t.”
Wearable technology can be a gateway for consumers to try or participate in outdoor activities.

Aligning products and services with wearable technology can drive a heightened interest in outdoor and attract new participants.

**Integrate wearable technology functionality and usage** into the in-store and online outdoor retail experiences.

**Market and merchandise gear and apparel around specific activities** and their wearable technology implications (e.g. how many steps involved, calories burned, target heart rate, best views to shoot, etc.).

**Enable peer-to-peer connections** for wearable technology users by creating social communities around outdoor activities, whether online or through events, which provide a platform for fun or inspiration for being active.

For specialty fitness retailers, the message is to get educated on the technology as more customers come in asking how and if their devices will interact with the latest fitness equipment. There might also be opportunity to sell the devices in-store. The fitness technology aisle at Best Buy keeps growing...” — DAVE FLYNT (PRECOR)
The relationship between consumers and wearable technology, on both a functional as well as emotional level, is becoming increasingly personalized.

The collection of highly personalized data from wearable technology users provides an opportunity for greater insight into outdoor participation needs, behaviors, and mindsets.

Build partnerships with technology providers to develop outdoor products and/or gain access to user data that would provide greater insight into active consumers’ behaviors.

Create a branded device and leverage the customer data to inform product development strategies and identify innovation opportunities.

Recognize gadgets as gear in marketing outdoor experiences to consumers.

Technology features and designs are evolving alongside our behaviors to take on a more essential role in our daily lives. Whether augmenting people’s existing abilities or evolving their interfaces alongside natural inputs to enable more intuitive control, these devices point to the increasingly sophisticated relationship people have with their technologies.”  

PSFK LABS FUTURE OF WEARABLE TECH REPORT
APPENDIX

Social Media Listening Overview
WHAT IS IT?

Social media listening is a research methodology that identifies and filters conversation in social media on individual topics and analyzes it from a quantitative and qualitative perspective.

In order to identify relevant conversation around a particular topic, complex queries are built to filter out discussions across a wide range of social platforms. The identified data is then cleansed and refined for optimal accuracy and reliability.

With a clean data set, the analysis process begins by using quantitative metrics to identify opportunity areas for deeper exploration from a qualitative perspective. As key themes begin to emerge around consumer behaviors, preferences, needs and expectations, the data is aggregated and synthesized into relevant consumer/market findings and actionable business opportunities that are strategically revealed through these insights.
Social Media Listening Process

Social Media Listening Database

- Offers real-time access, as well as five years of historical data, to over 250 million global sources and several hundred billion consumer sound bites found within.

Topic Development and Data Cleansing

- Define detailed topics through inclusion and exclusion filters, as well as disambiguation tactics.
- Leverage natural language processing technology for 90% data output accuracy.

Data Exploration and Analysis

- Review quantitative metrics (volume, impressions, sentiment, gender, geography, sources, passion intensity, etc.) to identify high-level conversation themes.
- Annotate consumer sound bites to determine preferences and behaviors, as well as key motivators and barriers.

Data Interpretation

- Use quantitative and qualitative data findings to uncover actionable insights, implications and opportunities.
THE VALUE OF SOCIAL MEDIA LISTENING

As a research methodology, social media listening provides a unique and unbiased view into consumer perceptions and sentiment in real-time that is often limited in traditional research. Unlike other research approaches, which ask opinion or observe behavior in controlled environments, social media listening provides a window into consumer opinion and behaviors expressed authentically to peers within social media.

While traditional research can be limited by existing knowledge of consumer behavior or market dynamics, social media listening can give insight into “what’s coming” and help companies anticipate trends or behaviors emerging with consumers.

And, it provides a cost-effective way to mine intelligence from a large-scale audience with easy access to niche segments that are often difficult and expensive to access through other qualitative methodologies like focus groups and ethnography.
OF SOCIAL MEDIA LISTENING

BREADTH & DEPTH: Access to global data across millions of sources

CONTEXTUAL: Reveals the “why” behind the “what”

UNBIASED: Unprompted view of consumer opinion and sentiment

PREDICTIVE: Leading indicator of emerging trends or behaviors

TARGETED: Access to difficult-to-reach niche segments

FLEXIBLE: Organic discovery that can be quickly directed or acted upon

TIMELY: Historical to real-time insight
APPLICATIONS FOR SOCIAL MEDIA LISTENING

CONSUMER, MARKET OR BRAND INSIGHT
Understand perceptions, attitudes, behaviors, needs and trends

BRAND MANAGEMENT
Monitor brand performance and reputation

INNOVATION
Reveal untapped consumer or market opportunities

CUSTOMER SERVICE
Quick response to customer needs or issues

RESEARCH AND DEVELOPMENT
Identify new product or market opportunities

MARKETING AND PUBLIC RELATIONS
Inform strategy, messaging and tactics
Companies are using social media listening intelligence to inform many aspects of business from strategy to marketing to product development and innovation.

When used in conjunction with other market research efforts, social media listening can enhance your consumer and market understanding at many different stages of the research process. Whether it’s to formulate a hypothesis, track or monitor a current situation, or validate and measure activities, social media listening is a valuable piece of the puzzle for gaining a holistic view and understanding of today’s consumers.
OIA’S SOCIAL MEDIA LISTENING PROGRAM

Outdoor Industry Association, as part of its strategic focus to understand changing consumer behaviors and shifting market dynamics impacting the outdoor industry both now and in the future, has added social media listening to its portfolio of research products it delivers to members.

From macro-level trend identification to deeper-dive analysis on key topics relevant to the industry, OIA will provide ongoing consumer and market insights through social media listening that will help members build proactive business strategies and quickly react to changes and shifts in the marketplace.

NEW PRODUCTS

“Social Buzz™,” a bi-weekly email available to members, will feature insights about consumer conversations happening online around topics of relevance such as technology, retail, diversity and lifestyle.

Quarterly reports, like this one, will offer a deeper look into emerging consumer trends of relevance to the outdoor industry.

If you are a member and interested in receiving “Social Buzz,” please visit our website at www.outdoorindustry.org/research to sign up.
ABOUT OUTDOOR INDUSTRY ASSOCIATION

Outdoor Industry Association® (OIA) was founded in 1989 by a group of visionary outdoor industry professionals who realized that “outdoor” could be much more than a passing consumer trend. Today, OIA is the leading trade association and voice of the outdoor recreation industry, serving more than 4,000 manufacturers, distributors, suppliers, sales representatives and retailers in the active outdoor lifestyle.

With offices in Boulder, CO and Washington, D.C., OIA is the title sponsor of Outdoor Retailer and the trade voice representing a $646 billion industry. OIA supports the growth and success of the outdoor industry through its focus on government affairs, sustainability, outdoor consumer insights, industry trends and youth participation. OIA hosts an annual industry leadership forum and delivers on-demand and in-person education, tools and resources to help its members grow and succeed in the dynamic and ever-changing outdoor recreation marketplace.