PHASE 3

CONSUMER BEHAVIOR ANALYSIS OF SHIFTING GEARS

MKTG 382

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Executive Summary:

In this document we are going to provide insight on the outdoor recreation industry, Shifting Gears, and perceptions around both. Through the secondary and primary research we have conducted, we are going to give recommendations about ways Shifting Gears can optimize its marketing mix.

We found that the outdoor recreation industry is a growing industry with a highly competitive landscape with no one firm dominating the market. The typical consumer in the outdoor industry is 24-55, makes over $75,000, and actively uses media outlets like Facebook and YouTube.

In the survey we conducted we found consumers care a lot about having an inclusive and cost-friendly environment. That the most effective way to promote the brand is through friends and word of mouth. We also found that women feel much more comfortable in an all-women's group rather than in a Co-ed program. Our survey also showed that the general opinions of shifting gears and their programs are positive and not where change should be focused.

We analyzed in-depth information on Shifting Gears and current consumer perceptions surrounding the brand through primary and secondary research. Shifting Gears is a Bellingham run non-profit organization with the vision of creating a cycling and hiking community where all people recreate with confidence and joy. They offer women only biking and hiking programs throughout the year to bridge the gap between marginalized populations in the outdoor recreation industry. We also took a deep look at consumer perceptions of Shifting Gears by analyzing our survey results to get a better understanding of how the brand is perceived. Although the sample we surveyed doesn’t represent the entire population of Shifting Gears target market, we can get a good understanding of women's current perceptions of the organization. The majority of our sample population had positive attitudes towards the brand and were interested in trying the services that Shifting Gears offers.

Based on the research we conducted on the outdoor recreation industry, we have compiled a list of recommendations for Shifting Gears to consider implementing. The first recommendation that we have is to focus on college students as a target market. WWU has a large community of women and LGBTQ+ individuals who have expressed interest in inclusivity-focused outdoor recreation, so focusing marketing efforts on that demographic would be greatly beneficial. Our next recommendation is to increase promotion through tabling, WOM, and social media marketing. This can be accomplished by having Shifting Gears tables set up at a significantly increased number of local events, which would help increase exposure and involvement of the public to Shifting Gears. Social media marketing could be enhanced by utilizing micro-influencers in the community. Our final recommendation regards diversifying the types of events/excursions offered to include activities for the winter season, such as snow sports, and utilizing the cycling “pump track” in downtown Bellingham to host skill training events.

Introduction:

The purpose of this research and behavioral analysis is to gain a better understanding of the outdoor recreation industry. The goal is to comprehend and analyze how consumers behave within the industry and to break down the different services/products that are offered within it. The methods used to find this information will be compiling secondary data from exploratory research on the outdoor recreation industry as a whole.

Outdoor Industry Overview:

The outdoor recreation industry as a whole is composed of many subcategories of industries related to the outdoors. Some of these categories include outdoor retailers, outdoor education, and outdoor recreational activities. According to a 2017 report on the outdoor recreation industry within the United States from the Outdoor Industry Association, consumer spending in the industry as a whole is around $887 *billion* annually (OIA, 2017).

To break this down, the OIA report segments this annual spending into two categories: *Outdoor Recreation Products* and *Trip and Travel Spending. Outdoor Recreation Products* includes “gear, apparel, footwear, equipment, services and vehicle purchases”, which generates $184.5 billion. *Trip and Travel Spending* includes “airfare, fuel, lodging, groceries, lift tickets, guides, lessons and more”, which generates $702.3 billion.

In addition to this, the industry generates 7.6 *million* American jobs. Based on information gathered from the Bureau of Labor Statistics in the 2017 OIA report, the outdoor recreation industry employs more people than the education industry (3.5 million), food and beverage service industry (4.7 million), and the transportation and warehousing industry (4.8 million). One of the reasons why the outdoor recreation industry is so large in its scope of employment is because it requires people with all sorts of backgrounds and skill sets in order to operate. Some examples of who this includes are individuals who work in engineering outdoor equipment, those who work in the retailing of all outdoor apparel and gear, those who design/manage websites for outdoor companies, those who work outdoors as educators and guides, park rangers, ski lift operators, zipline engineers, professional conservationists, etc. The list goes on and on.

Outdoor Industry Background:

According to an article from the Outdoor Industry Association, the outdoor recreation industry in the U.S. really came to fruition due to Theodore Roosevelt (26th President of the United States), who lived his life as an avid outdoorsman and conservationist. In 1887, he co-founded a "rich boys" club with George Bird Grinnell called the *Boone and Crockett Club* where young boys hunted, fished, and learned about the ways in which outdoor recreation requires preservation of animals and their habitats (Ross, 2018). The formation of this club formally tied together "preservation, recreation, and goods that can be turned into money".

Product/Service Variations, Benefits, and Features:

Outdoor retail:

Considers all organizations that sell products that play a role in outdoor recreation. This includes products such as camping equipment (tents, bug repellent, fire starters), boating equipment (rigging, life jackets, propellers), hiking equipment (footwear, jackets, hiking poles), biking equipment (frames, tires, helmets), etc.

Outdoor education:

Considers all organizations that work to educate people on how to safely and responsibly operate in an outdoor setting. This includes things such as outdoor survival courses, boating courses, and animal/plant identification courses.

Outdoor recreation activities:

Considers all organizations that provide access to and involve people in recreational activities in an outdoor setting. This includes activities such as whitewater rafting, group bike rides, and snowboarding.

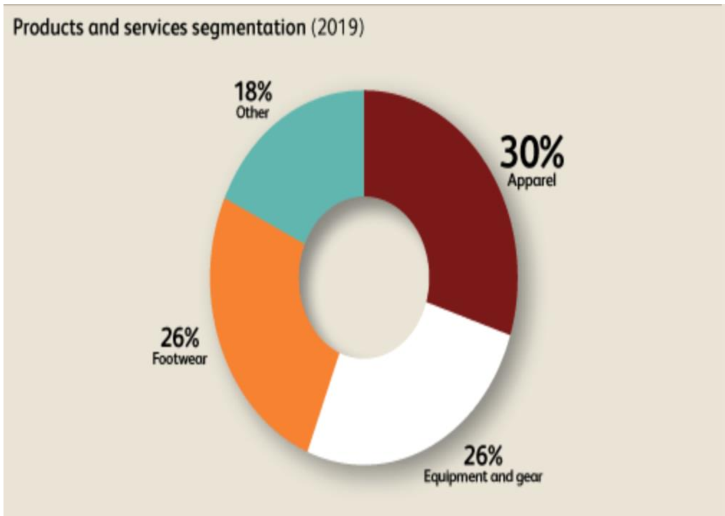
Benefits:

The benefits that come from the outdoor recreation industry are invaluable to our nation. In addition to generating millions of jobs for people all across the socioeconomic spectrum, the 2017 OIA Outdoor Recreation Economy Report states numerous ways that outdoor recreation benefits individuals and communities. Research shows that children with ADHD experience milder symptoms when playing outdoors in a natural setting (OIA, 2017). In addition to this, there is evidence to suggest that moderately active retirees on average have significantly lower health care costs compared to those who are more sedentary. Regarding the broader scope of benefits from this industry, the OIA writes that there is research to suggest that investment in outdoor recreation has been linked to lower crime rates, increased educational performance from elementary school students all the way up to post-secondary students, and “lower long-term individual and public health care costs” (OIA, 2017). The outdoors brings people together. With countless ways to express yourself and have fun in an outdoor setting, outdoor recreation serves to bring communities together and break down the societal divides that we are taught. In addition to these economic and social benefits, outdoor recreation also has many physical benefits. Some of these include improved health, improved focus, improved sleep, and reduced stress (LiveStrong, 2019). This is in part due to the active nature of outdoor recreation that helps people exercise and get in better shape. There are also arguments for outdoor recreation being more effective than pharmaceutical medication for treating anxiety and depression because outdoor recreation does not have adverse side effects. Overall, outdoor recreation has countless benefits of all types that can and should be highlighted to consumers to get them involved in the industry.

Outdoor Retail Industry:

Industry Overview:

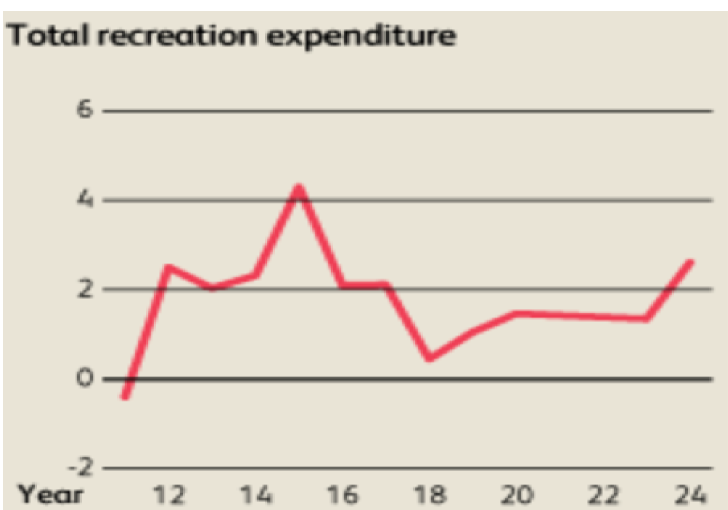
The outdoor retail industry is segmented into 4 main portions. Apparel makes up 30% of the industry, equipment and gear comprises 26% of the



industry, footwear encompasses 26% of the industry, and 18% of the industry is compiled of other products and services (Fernandez, 2019). The industry is dominated by a few key companies, but still remains competitive with smaller less popular firms. In fact, in 2019 IBIS World (2019) reported 5,987 business operating in the industry.

Industry Trends:

The rise of popularity in outdoor recreational activities has reflected

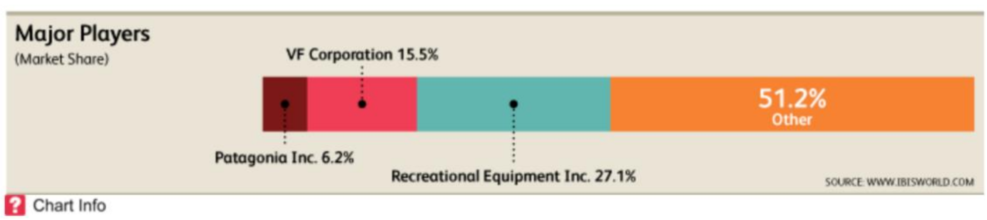


positively in the outdoor retail industry revenue and growth. For instance, total industry revenue has increased 6.3% in the last 5 years alone (Fernandez, 2019). Similarly, expenditure on recreation has seen positive growth in the last eight years with a notable increase in 2015. Total recreation expenditure is expected to continue growing for the next five years, which in turn, will positively reflect on outdoor retail stores.

In recent years, many outdoor retailers have tapped into digital retailing potential. The eCommerce industry as a whole is valued at $546.1 billion, with $45.8 billion being segmented into eCommerce sporting goods. Examples of brands competing in this segment are Backcountry.com, Evo, and even Amazon (Fernandez, 2019) It is important to note that the outdoor retail industry as described by IBIS World does not include online-only retailers. However, brick and mortar stores like LL Bean have recently began to notice potential in the eCommerce industry and have put more resources into developing their online presence (Fernandez, 2019). In fact, in 2015 alone, REI reported a 23% increase in digital sales while only a 7% increase in in-store sales (Nickelsburg, 2016).

Market Size and Competitors:

The outdoor retail industry is currently valued at 8.1 billion dollars (Fernandez, 2019). The market itself is dominated by three major companies, Recreational Equipment Inc. (REI)(27.1%), Patagonia



Inc.(6.2%), and VF Corporation (15.5%) who own companies like The North Face.

(Fernandez, 2019)

Mentioned previously, eCommerce retailers who focus specifically on outdoor goods (apparel, footwear, equipment, etc) like Backcountry.com have proven to be strong competitors to brick and mortar stores operating in the industry.

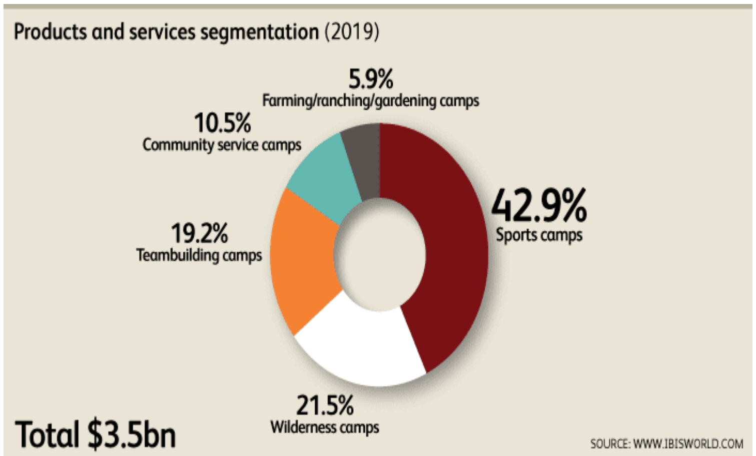
Usage:

Target	Base Total '000	'000	% Detail	% Target	Index
Total	247,024	8,069	100.00	3.27	100
Men	119,259	5,265	65.25	4.42	135
Women	127,765	2,804	34.75	2.19	67
Educ: graduated college plus	76,755	3,587	44.46	4.67	143
Educ: attended college	70,724	2,393	29.65	3.38	104
Educ: graduated high school	71,398	1,721	21.33	2.41	74
Educ: did not graduate HS	28,148	367	4.55	1.30	40
Educ: post graduate	26,902	1,274	15.78	4.73	145
Educ: no college	99,546	2,089	25.88	2.10	64
Age 18-24	29,782	1,164	14.43	3.91	120
Age 25-34	44,223	1,787	22.15	4.04	124
Age 35-44	40,272	1,868	23.15	4.64	142
Age 45-54	42,569	1,733	21.47	4.07	125
Age 55-64	41,475	920	11.40	2.22	68
Age 65+	48,703	597	7.40	1.23	38

Spending in the industry is done mainly through brick and mortar stores, however, many retailers now offer easily accessible digital sites for consumers as well. It is difficult to gauge how often an individual might make a purchase from an outdoor retail store as different people have different amounts of engagement in the outdoors which in turn will affect their purchasing habits. The only information related to frequency of purchase found through University Reporter (2018) claimed that, in 2018, 8.07 million people had purchased The North Face apparel, gear, or equipment in the last 12 months (GfK, Mediamark Research & Intelligence, 2018). It is safe to assume that an individual who more frequently participates in outdoor recreation will likely make more visits and purchases at outdoor retail establishments.

Regarding company loyalty, it is hard to determine consumers' loyalty to a specific retailer in the industry. However, companies use membership programs, dividend programs, and other loyalty programs in an attempt to retain customers. For instance, REI pays back 10% of their individual members' total purchases at the end of the year in the form of a dividend.

Outdoor Education Industry:



Industry Overview:

The outdoor education industry is currently valued at 3.5 billion dollars. Products and services segmentation are divided into 5 parts pictured in figure 7a listed below. 5.9% makes up farming, ranching and gardening camps of the industry, 42.9% makes up sports camps within the industry, 21.5% makes up wilderness camps of the industry, 19.2% makes up team building camps in the industry, and 10.5% makes up community service camps in the industry (Amir, 2019).

(Figure 7a)

Industry Trends:

The most profitable camps offer specialized instruction in niche areas focused on specific programs or activities. Although children form the primary market, programs exist for adults as well, and the instruction given through such courses often comes from experts in their respective fields. For parents, summer camps offer a venue for their child to experience increased freedom while remaining under the watchful eye of trusted staff. For adults, camps offer an opportunity to develop new skills or refine existing ones in a social setting
(Amir, 2019).

Market Size and Competitors:

The top five competitors of the year 2018 are Peak 7 Adventures, Outward Bound, CampTown, Wilderness Inquiry, Boy Scouts and NOLS. Market size listed below for the top five competitors are $638,858 and 3,058 students/members attending Peak 7. Outward Bound increased dramatically compared to Peak 7 at $4,167,031 and 42,694 students/members attending. CampTown's market size was estimated roughly at $421,089 and 3,447 students/members attended. Wilderness Inquiry has $4,363,196 and a total of 40,222 students/members attending. Boy Scouts is the highest market size at $209,914,000 and 2,021,615 members. Lastly, NOLS comes in at $44,965,000 in market share with 27,477 active members.

Competitors TOP 5	Market Size	Net Income	Number of students/Members
Peak 7 Adventures:	638,858	638,030	3,058
Outward Bound*:	4,167,031	310,034	42,694
CampTown:	421,089	-8,598*	3,447
Wilderness Inquiry:	4,363,196	195, 794*	40,222
Boy Scouts:	209,914,000	915,918	2,021,615
NOLS:	44,965,000	8,050,000	27,477

Figure 8.1
("Peak 7 Annual Report," 2019), ("Outward Bound Annual Report," 2018), (CampTown Annual Report," 2019), (Wilderness Inquiry Annual Report," 2019), ("Boy Scouts Annual Report," 2019), ("NOLS Annual Report," 2019)

"*" - Data collected from 2017

COMPETITOR RANKING BASED ON REVENUE GENERATED (2018):

Competitors	Market Size	Ranking
Boy Scouts:	209,914,000	1
NOLS:	44,965,000	2
Wilderness Inquiry:	4,363,196	3
Outward Bound*:	4,167,031	4
Peak 7 Adventures:	638,858	5
CampTown:	421,089	6

Figure 10.1
("Peak 7 Annual Report," 2019), ("Outward Bound Annual Report," 2018), (CampTown Annual Report," 2019), (Wilderness Inquiry Annual Report," 2019), ("Boy Scouts Annual Report," 2019), ("NOLS Annual Report," 2019)

The table above shows the ranking between the top five competitors based on market size. Boy Scouts comes in first, NOLS second, Wilderness Inquiry comes in third, Outward Bound fourth, Peak 7 Adventures ranked at fifth, and lastly CampTown in sixth.

Usage:

Education in the industry is taught through mentors. People who have real-life hands-on experience have a better way of explaining the concepts to an audience of people. People who are interested in these activities either join a club or find a mentor who has experience in the field. Many clubs focus on group activities, but some outdoor education is done between a mentor and their apprentice. There is a broad range of time that different people spend on outdoor education including annual/seasonal trips to learn new outdoor skills, while others may only participate in one outdoor education course in their life. This is related to fast/slow decision making. People who spend a bulk of their time learning in the outdoors likely tend to do a lot of their spending in the outdoor recreation industry, so when the time comes to decide what they want to spend their money on, it is very likely that their fast-decision making ("system 1") will kick in and tell them that it is a no-brainer to allocate those resources towards more outdoor education. On the other hand, those who do not normally participate in outdoor recreation will have to spend more mental energy ("system 2") on making the decision of whether or not they want to spend money on outdoor education.

Consumers benefit from the experience and expertise of those individuals who regularly explore and recreate in the outdoors. Most people who will use the services are people who would otherwise already be in the outdoors independently, but perhaps want to improve particular skills. The service is delivered through courses and hands-on experience with the outdoors. Consumers benefit by gaining the skills necessary to safely and responsibly recreate in the outdoors in various ways. People can access the services by joining clubs or by taking courses from a college or university. Normally, outdoor education participants will include a big group of people with various backgrounds. Some will be incredibly experienced and others will be novices in whatever skills they want to learn. Experienced individuals will use the service when they want to brush up on certain skills or when they want to help spread their knowledge and work as supplemental instructors. Outdoor education groups will include a myriad of people with various backgrounds. Some will be incredibly experienced and others will be novices in whatever skills they want to learn. Experienced individuals will use the service when they want to brush up on certain skills or when they want to help spread their knowledge and work supplemental instructors. Like in any industry, there are hardcore fanatics of a service/product/activity and are more causal participants. A lot of people who have an interest in outdoor recreation activities meet and talk with other people who are part of that group as well. While there are countless small, local outdoor education organizations throughout the nation there are a handful that are significantly more visible than others. Some of these include the Boy Scouts of America, Outward Bound, and NOLS.

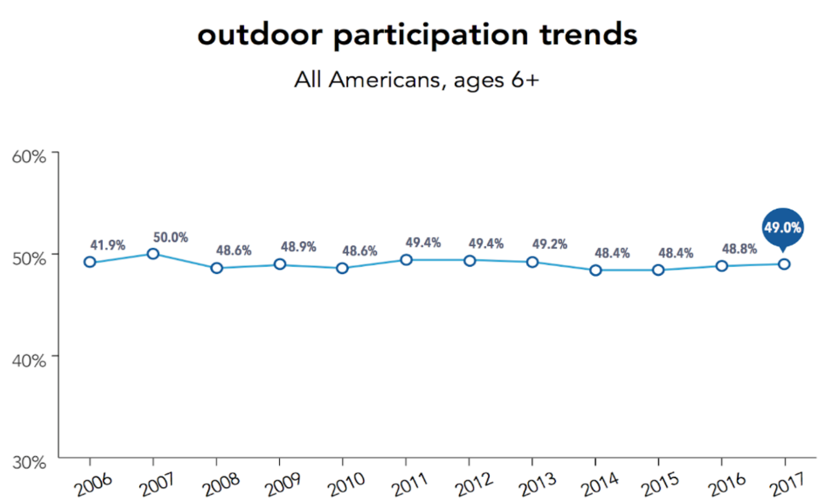
Outdoor Recreational Activities Industry:

Industry Overview:

Outdoor recreational activities are the backbone of the outdoor industry. Each year, 145 million Americans participate in some form of outdoor recreation! That means more Americans participate in outdoor activities than attend NHL, NBA, MLB, and NFL games combined (Combined attendance)! These Outdoor activities include things like camping, running, hiking, boating, biking, and outdoor concerts. Of these, running and trail running seems to be the most popular with 19% of Americans (Participation Report: pg. 8, 2018). Followed closely by fishing, hiking and biking respectively. With so many Americans participating outdoors, the outdoor recreation industry has a huge impact on America and its economy. In fact, the impact of outdoor recreation on America's economy is almost as big as that of hospital care (Outdoor economy, 2020)!

Industry Trends:

In 2017, almost half, 49%, of Americans over the age of 6 years old participated in an outdoor activity at least once (Participation report:pg1, 2018). That's up .2% from the year before and this seems to be a growing trend in the industry. In 2017, 13.6 million American's participated in outdoor activities for the first time or returned to the outdoors after a long break. Compare that to the 11.9 million Americans that stopped participating outdoors in 2017, and we see a churn rate of 2.3% (Participation report: pg. 8, 2018). This means that the outdoor industry gained a net total of 1.7



million participants in 2017. On top of that, once people join the industry, they rarely turn back. This is indicated by the fact that 90.7% of people who participated in 2016 continued to in 2017 (Participation Report: pg. 7, 2018). These people are not just participated in a few times a year, the average outdoor participant went on an average of 74 outings in 2017, over once a week (Participation Report: pg. 7, 2018).

(Participation Report, 2018).

Market Size and Competitors:

The outdoor recreational activities industry is quite niche as far as data collection goes. There are no highly competitive companies in this industry. Competition is mainly local and not national as many of the companies operating in the industry choose to bring clients to recreate in their local area.

Furthermore, the overall market size is difficult to determine as there is no accurate gauge as to the number of operators in the industry as well as the total revenue that the industry generates.

Usage:

People enjoy the outdoors in various ways. Many people enjoy runs or hikes alone as a break from the world and as a form of exercise. Others create groups with friends and the community and go out on hikes as a healthy social outing. The benefits of both can vary on who you do it with, but overall the main benefits include healthy exercise and stress relief (Kondo, 2016). Americans' biggest access to the outdoors is the many state and national parks around the country. Every year, state parks have over 760 million visitors, that's more than 2 visits per American (National Park Service Visitor Use Statistics.).

With how large the industry is, there is more access to outdoor equipment and trails than ever before is. The average outdoor participant goes on about 74 outings per year, with about 20% of participants saying they attended 2 or more outings a week (Participation Report: pg. 7, 2018). Men participate slightly more than women in General outdoor activities, 54% to 46%. Along with this, the majority of participants are 25 and older, college graduates, and typically are financial well off with 32% of participants making over $100,000 (Participation Report: pg. 6, 2018). There also is a scarce amount of diversity in the industry with 74% of participants being Caucasian (Participation Report: pg. 6, 2018). As stated, 90% of people who participated last year continued to participate outdoors this year. People are loyal to the outdoors, not just for the individual benefits they get from it but for the love of mother nature. As long as the world is inhabitable, people will go outside.

Non-Profit vs For Profit:

Purpose:

Every company is created with a distinct purpose. While nonprofits aim to provide societal needs, for-profit businesses care about maximizing profits. These profits are then dispersed to the company's owners and shareholders. Since nonprofits have no owner, their focal point is making sure revenue is greater than costs, while for-profit businesses are concerned with maximizing revenue while reducing costs. Because nonprofits have no owner, they recycle their profits back into the business for future activities. (Bethune, 2019).

Funding:

For-profit organizations often obtain their initial funding through bank loans and local investors. As they gain traction, revenue generated by sales is what
fuels funding. Nonprofit organizations require private donations of both time and money, corporate sponsorships, government grants, fundraising, and crowdfunding.

Audience:

The marketing segmentation strategy is used by for-profit businesses to create a much more defined target audience. This allows for the company to focus on relationship building and creates heavy users. Customer retention makes a strong feedback loop keeping customers purchasing products/services and helps generate revenue. Often nonprofits are not offering a product or a service, rather they are coming to their audience about a message. As long as the interests of the audience match up with the nonprofit's message, then they are a good target. This audience can include the general public, corporate sponsors, volunteers, and donors (Norwich University Online, 2016).

Income statements:

The government requires for-profit organizations to share a quarterly income statement. This information helps shareholders assess a company's financial performance. Nonprofits are not required to share a quarterly income statement but must release a general statement about their activities so that donors and the general public can see where their money is going.

Taxes:

Nonprofits are not taxed on net income, but still have to pay state and property taxes. For-profit organizations are given no tax exemptions and must pay taxes based on their net income (Bethune, 2019).

Industry Details & Characteristics:

Primary Consumer Segments:

In the United States, there are 198 million adults between the ages 18-65, and 60% of them qualify as being outdoor consumers (Consumer Segmentation Summary: pg. 3, 2015). Those who define themselves as outdoor consumers:

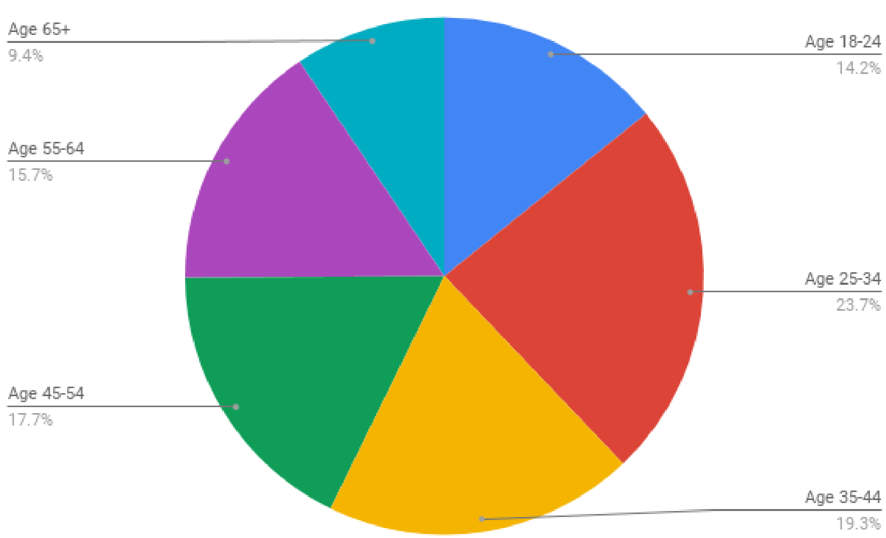
- Spend at least one hour per week outdoors
- Participate in any outdoor activity at least once during the year
- Purchase apparel, footwear, equipment, and/or technology for outdoor activities

Looking at how often people participate in a specific activity will give a good understanding of the different consumer markets.

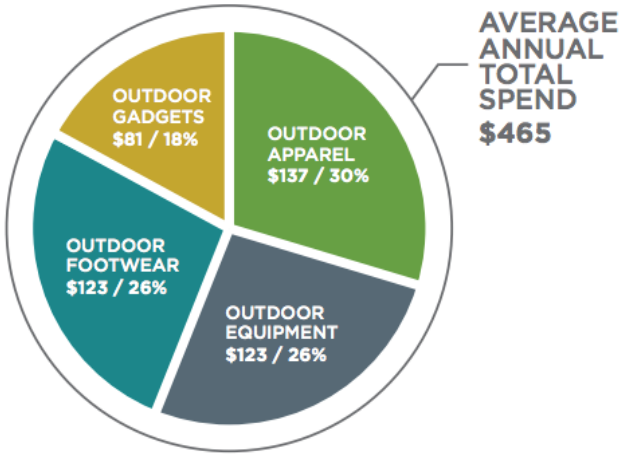
Characteristics & Product Usage:

Some consumer characteristics that are important to the outdoor industry include age, income level, education, and media usage. Since the industry includes a huge variety of different activities, the following data will focus on people who have participated in hiking in the last year. Data from University Reporter shows that the average consumer who participates in hiking during the year are in the age group of 24-55. Although they have the most participation, it is worth noting that there's a very balanced divide within all age groups even in older ages. (Gfk, 2018)

Hiking Participated in last 12 months



Another important characteristic for the average outdoor consumer is gender. There is a small divide in gender when it comes to hiking, with women being 3% more likely to hike than men are. 53.24% of all adults who have hiked in the last 12 months were women. Going into income levels, those with an income of $75,000-



$149,000 are 30% more likely to hike at least once during the year, and those with more than $150,000 are 70% more likely (GfK, 2018).

Media habits for those active in this industry include a variety of different platforms but the majority is involved in social media outlets. 90.72% of all users who participate in hiking are involved in social media. Media apps like Instagram, Facebook, and YouTube are the most active for adults participating in hiking. 40% for Instagram, 75.42% for Facebook, 62.47% for YouTube (GfK, 2018).

Purchase Attitudes:

The average outdoor consumer spends $465 annually on apparel, footwear, equipment, and technology related to their activities (Consumer Segmentation Summary: pg. 3, 2015). Since most outdoor purchases are so involved in their activity, price is a big factor when it comes to purchasing attitudes. Although having the best gear is important, most consumers would rather purchase the product that works best with a relatively affordable price, than the most expensive option. Other important attributes that affect attitude include durability, comfort, and quality (Consumer Segmentation Summary: pg.3, 2015).

Growth and Cultural Trends:

"The outdoors" redefined:

Previously branded as ultra-exclusive athlete focused, the outdoors industry is shifting toward a more inclusive and leisure driven image. Historically, brands used celebrities and fit individuals to promote exercise products. In recent years, a more diverse buyer persona is used to sell these same products. Rather than alienating a large population of viewers by targeting only "fit individuals" this larger lens incorporates and encourages more of society to be active and participate in the outdoor industry (Bethune, 2019). The result has been an emergence of athleisure wear.

ath·lei·sure
/aTH(ə)ˈlēZHər,aTH(ə)ˈleZHər/

noun TRADEMARK IN UK

casual, comfortable clothing designed to be suitable both for exercise and everyday wear.
"athleisure is perfect for traveling"

Growth in the Industry:

While fashion apparel sales went down 4% overall, "data from marketing firm NPD Group Inc indicates that the $48 billion active apparel category within the sector is up 2%, with outdoor apparel as one of the drivers of that growth". (Chen, 2018).

Digital presence:

Videos drive engagement along with depicting the outdoor experience. YouTube and Instagram are both platforms where this content thrives. One of the best ways to promote lifestyle is through social media and video (Richardson, 2019). It gives the best snapshot of "a day in the life" of whomever or whatever is being promoted. Social media also allows for a direct relationship with consumers. Consumers want and crave this direct lifestyle marketing because it creates this sense of a relationship with the brand.

Direct-to-consumer:

As already stated, consumers desire a more authentic relationship from companies. A way of doing this is through direct-to-consumer sales model. An emergence of outdoor brands using this model can be seen in the past couple of years. This trend is not limited to the outdoor industry and can be noticed across the entire retail realm.

Focus on sustainability:

Emphasis on corporate social responsibility increases as consumers continue to show further interest in both sustainable products and business practices. Businesses like REI are jumping on board and taking advantage of this opportunity. REI launched new sustainability standards in terms of how things are made, and the amount of waste included in the process. Transparency allows consumers to make educated decisions on which products and brands they would like to support, and rewards companies meeting consumer demands for more sustainable products. (Crisman, 2019).

Rentals:

Rentals give customers the opportunity to test out products without committing to a purchase. Outdoor gear often is costly, but rentals create an alternative option for those who cannot afford the full purchase price. Renting also prevents the struggle of carrying around bulky items while traveling and adds the value of convenience. REI's rentals/class pairing is an example of this trend in use. They recognize that not everyone has a paddleboard or even wants to buy that one for that matter, but this does not mean plenty of individuals would not enjoy paddle boarding if they had access to it.

(REI Boathouse at Meydenbauer Bay Park:
REI Co-Op., 2020)

From the secondary data we collected, we conclude that the outdoor industry is a vast and growing market that has a low barrier of entry and is highly competitive - with no one firm owning a large share of the market. The industry is evolving with the world, and as new technology and opportunities arise, so does access to the outdoors in ways never before possible. Our findings show that more and more Americans are getting involved in the outdoors. Whether its buying equipment, educating themselves, or just going on a hike, they are going to continue to contribute to the outdoor recreation industry.

In this next section we will use our primary research to discuss Shifting Gears and the industry they operate within.

About the Survey:

We have created and conducted a survey for the purpose of gathering information for Shifting Gears. Shifting Gears is a non-profit firm based out of Bellingham, Washington creating welcoming recreation experiences that encourage confidence, wellness, growth and joy. By gathering information, we intend to further develop our understanding of the industry Shifting Gears and how it operates. We have provided background information about the way consumers are attracting to their services. This survey was developed as part of our teams course work for Western Washington University's Consumer Behavior and Marketing Research classes.

We structured the survey so that participants were given an introduction informing them about the purpose of the survey as well as a screening question, warm-up questions, the body of the questions, and demographic questions at the end of the survey. As part of our research, we only wanted to get responses from women over the age of 18, so our screening question was simply, "what gender do you identify as?". Additionally, in our introduction to the survey, we kindly requested that only individuals identifying as **female** participate in the survey. The warm-up questions include cognitively simple questions relating to participants social media habits and preferences. The body of the survey housed the majority of the questions and related to participants experiences with outdoor recreation as well as their opinions, feelings, and knowledge of services like Shifting Gears. Finally, the demographics section of the survey asked about participants age, race, income, education, and residency.

This survey was administered through a nonprobability convenience sample. Primary distribution methods included, word of mouth (friends/family members), social media such as Snapchat and Facebook, and email. Currently, we have 26 valid responses in an ongoing survey. However, for the purpose of this report we will be using all data collected as of February 16, 2020.

From our survey participants, the average age was roughly 25 years old, however, there were two outlying age responses of 50 and 60 years old. Of the total respondents who took the survey, an overwhelming 65% of participants reported to be white. Furthermore, 73% of respondents reported to being currently enrolled in college, earning a bachelor's degree, or earning an associate's degree meaning that the majority of our respondents are already in college or have completed some college. 61.9% of our respondents reported making <$10,000, hence the majority of college students. Finally, about 83% of respondents live in or around the surrounding Bellingham area.

Due to a lack of resources to conduct a survey with a proper sample, our survey was conducted primarily through a convenience sample while working with biased data.

Usage:

Purchase Triggers:

According to the research we conducted, there are motivators that would encourage an individual to attend an outdoor recreation event or purchase a similar service. Many expressed their concerns about the prices of services relating to outdoor recreation. If the services were free, or very cheap, potential participants would be more motivated to attend.

Furthermore, some said that an inclusive, non-judgmental, friendly environment would make them more interested in participating in an outdoor recreation program. Specifically, several respondents said that an all-women's environment would motivate them to attend. In fact, we found through our research that 80% of women strongly agree or agree that an all-women's environment would make them feel more comfortable participating (Q18). Also, respondents noted that they would participate in outdoor recreation services as a social event and if they knew that their friends were going to be there.

In the case of Shifting Gears, they have an off season over winter where they do not offer any services aside from workshops and fundraisers. We know from question 7 of our research that individuals participated in outdoor recreation services year-round. So, even though Shifting Gears does not offer services over the winter, there is opportunity to keep their audience engaged by offering a greater frequency of workshops and events.

75% of outdoor consumers shop with intent to purchase and will educate themselves prior to making a purchase. In fact, 40% of consumers reported that they are only shopping to get what they need. 35% of consumers shop with an idea of what they want but are open to new ideas (OIA, 2015).

In a study conducted by the Outdoor Industry Association (2015) consumers said that their main concerns when making purchases was if there are sales and specials (63%), has the lowest price (57%), has a wide range of products (57%), and is conveniently located (54%).

This data is not representative of people using Shifting Gears services, however, still relates to the same industry and can be used to generalize consumer behavior. Shifting Gears offers services with a range of prices from free to over $100. This present consumers with options to use their services at a cost-effective price. Furthermore, location is important for consumers when they make purchases. Shifting Gears hosts the majority of their events at a local hill less than 15 minutes outside of town. So, when considering options to use outdoor recreation services, consumers do not have to be concerned with price or location.

Purchase Frequency:

It is difficult to assess the actual purchase frequency of outdoor recreation services like Shifting Gears. Just because an individual participates in outdoor recreation, does not mean that that individual uses outdoor recreation services. We were unable to find data regarding an individual's frequency of participation in outdoor recreation compared to how often an individual participated in an outdoor recreation service. However, based on our primary research and additional secondary research we can determine the amount of people interested in participating.

Based on our research, only 18% of participants claimed to be part of an outdoor recreation program or group (Q7). These groups included intramural sports, climbing and hiking clubs, and weekly women's group skiing groups. These tend to be weekly or every other week programs. Also, the types of recreation groups mentioned can be used in every season. So, consumers are willing to purchase outdoor recreation services year-round for a range of different activities.

According to a study from the Outdoor Industry Association (2019) on young adults aged 18 to 24, road biking, mountain biking, BMX biking, and related activities were ranked second in frequency of participation. Essentially, there were an average of 43.2 cycling outings per participant annually and 128.1 million total outings. Furthermore, 14.7% young adults surveyed participated in some form of biking and it is estimated that there are around 3 million participants.

Furthermore, in the same study of 18-24, year old's, hiking was found to be the second most popular outdoor activity by highest participation rate. It was reported that 19.5% of young adults in the US participated in some form of hiking. Also, the average respondent participates in hiking 14.5 times annually and 57.3 million total outings annually (OIA, 2019)

The Outdoor Industry Association categorizes outdoor consumers into seven segments who have various levels of engagement and participation frequency. The first segment is *The Achiever* (10% of the U.S. outdoor consumer population) who is highly performance driven and demonstrates high engagement and participation in the industry. *The Achiever* also spends, on average, the highest annually in the outdoor industry of the seven segments ($799). The second segment is *The Outdoor Native* (12% of the U.S. outdoor consumer population) who are highly involved and established in the industry and have an average annual spending of $637. The third segment is *The Urban Athlete* (20% of the U.S. outdoor consumer population) who is competitive and categorized as "stressed", this segment has an average of $781 per consumer annually. The fourth segment is *The Aspirational Core* (14% of the U.S. outdoor consumer population) who show moderate engagement in the industry and have an annual spending of $476 per person. The fifth segment is *The Athleisurist (20%* of the U.S. outdoor consumer population) who are emotionally driven consumers that have an average of $284 per consumer. The sixth segment is *The Sideliner* (12% of the U.S. outdoor consumer population) who have lessened involvement in the industry and an average of only $162 per consumer. The last segment is *The Complacent* (14% of the U.S. outdoor consumer population) who are the least engaged in the industry and have the lowest annual spending per consumer of $143 on average (OIA, 2018).

Realistically, services that Shifting Gears offers are applicable to any of these seven segments. Shifting Gears is interested in both people who are already highly involved or moderately involved to foster the existing women's mountain bike community in Bellingham and the less involved individuals who may be looking for a inclusive environment to learn a new skill. The more involved groups (The Achiever and Outdoor Native) naturally have the highest average hours spent outside per week (27 and 22 respectively). So, we can assume that people making the most frequent purchase of services that Shifting Gears offers will be the people who spend the most time participating in outdoor recreation.

Switching Behaviors:

The U.S. Department of Agriculture writes in their 1980 National Outdoor Recreation Trends Symposium, "Many leisure activities are substitutable, and the individual can freely interchange among them. Similarly, some activities are complementary -- as demand for one goes up the demand for others goes down… people will adjust their patterns of leisure behavior through substitution and complementary decisions about the activities they select" (USDA Forest Service, 31). Essentially, people adjust their activities as they see fit and make up for the loss of one leisurely activity with another. However, if companies fail to meet participant expectations such as inclusivity, there is cause for the participant to switch to a different company offering similar services.

To expand on inclusivity, Shifting Gears is one of only a few biking/hiking services that are women only in Bellingham. Other notable local groups are the Whatcom Mountain Bike Coalition Joyriders, who "…. Offer a positive, supportive place for women of ALL levels and disciplines of mountain biking" (WMBC, 2019). This service is a completely free mountain bike club that meets twice monthly. The main difference between Shifting Gears and the Joyriders is the expense. Shifting Gears offers a mix of free and paid rides and hikes. Consumers using these two services expect an inclusive environment. So, if their expectations are not met, the consumer has room to try a new service. While the Joyriders are competition to Shifting Gears, the services do not overlap, so consumers could hypothetically use both services.

Notable outdoor industry companies like REI, The North Face, and Columbia offer accessible brick and mortar stores as well online shops. In a study conducted by Salesforce, 72% of consumers agreed that they expect companies to understand their needs and expectations. So, for companies who offer only an online store or only a brick and mortar store, it is important for them to understand their consumers and know what they need in order to retain them. Furthermore, in the same study conducted by Salesforce, it was found that 66% of consumers say they're extremely or somewhat likely to switch brands if they feel like they're treated like a number rather than an individual (OIA, 2018).

A few important notes here, this study was conducted on a sample not representative of Shifting Gears customers, however, the finding is still generalizable. Essentially, to retain brand loyal consumers, it is important for companies to provide genuine communication to their customers, integrate personalization into the consuming experience, and deliver accessible service experiences. For Shifting Gears, this looks like enforcing their values (inclusivity etc.) during retreats and activities.

Barriers to Using Outdoor Recreation:

Transportation:

In a study conducted by the Outdoor Industry Association (2019), it was found that 63.3% of individuals surveyed were able to participate in outdoor recreation by traveling 0-10 miles. 27% of individuals surveyed traveled between 10-50 miles to participate in outdoor recreation. And in extreme circumstances, 9.7% of individuals traveled greater than 50 miles. Adding public transportation or rerouting existing public bus lines via parks may alleviate the transportation issue to some extent (Perceived Constraints to Outdoor Rec, 2014). In our own research we found that at least one respondent cited transportation as a reason that they do not participate in outdoor recreation.

Monetary:

Outdoor recreation is expensive, and while companies like Shifting gears offer extremely cost effective, and sometimes free, services the equipment required to participate is often a barrier of entry for many people.

In our own research we found that mountain biking and road biking were overwhelmingly the forms of recreation that participants were least active in (Q6). 86.36% of respondents reported to never mountain biking while 63.64% of respondents reported to never road biking. The equipment required to participate in these activities is not cost effective. Between shoes, clothing, helmet, and bike one could be spending easily thousands of dollars before even participating in the activity. While we cannot be certain that people are not able to recreate due to finances, only 18.18% of respondents reported they were least active in hiking, an extremely cost-effective form of recreation.

From our survey, we found that at least five respondents claimed that cheaper, or free, services would encourage them to participate in outdoor recreation services (Q11).

Danger and Fear:

Depending on an individual’s experience level and exposure to the outdoor recreation environment, certain services can appear scary or dangerous. In our research, 34.78% of respondents reported that services offered by Shifting Gears seemed more daunting than exciting (Q17).

Furthermore, fear of performing or being included are barriers of entry for some. 33.34% of respondents to our research claimed that the outdoor recreation community is either not inclusive or very not inclusive (Q16). Continuing, 76.19% of respondents claimed that they would be interested or very interested in participating in an all-women's outdoor recreation group (Q18). Similarly, at least six respondents claimed that an inclusive, judgment free environment would encourage them to participate in outdoor recreation services (Q11).

Time Barriers:

A study conducted by the Journal of Park and Recreation Administration found that 71.7% of their respondents cited work and other time related commitments to be their biggest barrier to participating in outdoor recreation (Edgar and Searle, 1985).

In our study we found that at least three respondents claimed that having more free time outside of their work and school commitments would motivate them to participate more in outdoor recreation (Q11).

Decision Making Factors:

Types of Decisions:

Decision-making and involvement are complex topics within Consumer Behavior that can be broken up into multiple levels and types. To understand how these, relate to the Outdoor and Outdoor Recreation Industries, we must understand that these industries exist to satisfy the needs of consumers. Different consumers have different needs which lead to different types of decision-making and different levels of involvement.

The Decision-Making process is split up into five steps:

- #1: Problem recognition
- #2: Information Search
- #3: Evaluation of Alternatives
- #4: Purchase
- #5: Post-Purchase

Step #1, problem recognition, occurs when people experience a difference between their *actual* state and their *ideal* state. When the potential ideal state is decided to be better than their actual state, it is considered an *opportunity* recognition because the consumer has the opportunity to achieve a state that they would consider to be superior. When the consumer's perception of their actual state goes down in quality, we consider that to be a *need* recognition because the consumer feels that they are lacking something essential to their personal homeostasis (Solomon, 2015, p. 48).

Step #2, information search, "is the process by which we survey the environment for appropriate data to make a reasonable decision" (Solomon, 2015, p. 48). In other words, this is the step of the decision-making process where we look to our accessible and relevant resources to find a solution to our problem. There are many ways to conduct an information search, including *pre-purchase* search ("recognize a need and then search the marketplace for specific information"), *ongoing* search (browsing for fun and keeping up-to-date on the on-goings of a particular market), *internal* search

(search our personal memories and life experiences to find relevant solutions), and *external* search ("...obtain information from advertisements, friends, or just plain people watching" (Solomon, 2015, p. 49).

Step #3, evaluation of alternatives, is the step of the decision-making process where consumers weigh their options of what consumption decision would best suit their needs/desires. There are two main categories of possible alternatives, known as the *evoked* set and the *consideration* set. Above these two categories would be the *all* category, which includes all possible alternatives that exist for that particular product/service category. The *evoked* set is all of the applicable alternatives that come to a person's mind when they think about a particular product/service category, while the *consideration* set only includes the alternatives from the evoked set that the consumer would realistically consider purchasing.

Step #4, the purchase, is perhaps the "fastest" step of the process because it can happen nearly instantaneously with the click of a "Complete Purchase" button on a website or only take a few minutes or two with a physical transaction of money inside of a brick-and-mortar store.

Step #5, post purchase, is the final and perhaps most vital step of the process from a marketer's standpoint because it is when the consumer evaluates whatever service or product they consumed. This is when the consumer decides whether or not their needs/wants were fulfilled, which heavily influences whether or not they will make the same consumption choice in the future.

While the information stated above lists the 5-steps of decision making, it must be noted that all 5 steps are only needed when going through slow decision making (system 2), which is considered to be deliberate, conscious, and effortful. For fast decision making (system 1), which is often effortless, habitual, and heuristic, consumers skip steps 2 and 3, moving from straight from problem recognition to purchase, then of course experiencing the post-purchase evaluation step as well.

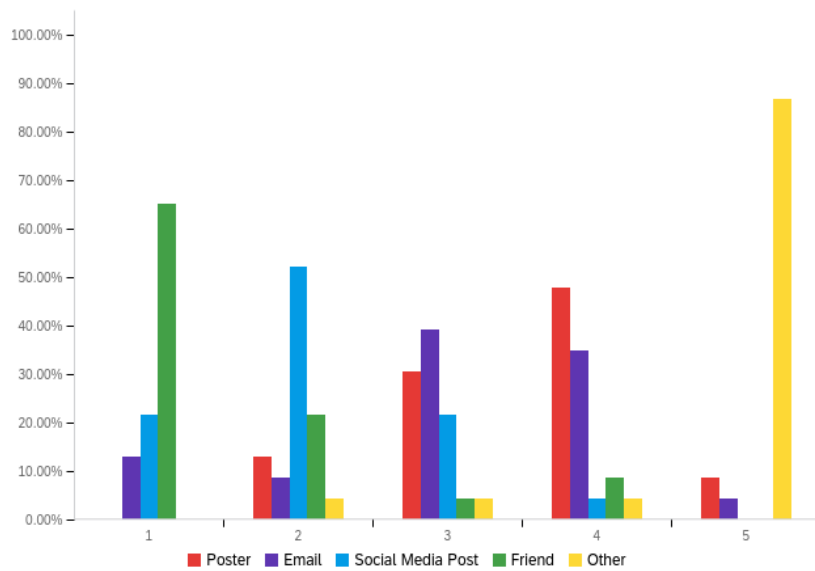
However, decision making in reality is not so black and white but instead exists on a spectrum with three main types of decision making: nominal, limited, and extensive. Nominal decision making is most related to the aforementioned fast decision-making type where there is essentially no search involved and consumers make decisions that take hardly any cognitive effort. Humans are cognitive misers therefore they like to make decisions that take as little effort as possible to save energy.

Extensive decision-making is when consumers exert a lot of energy into making sure they find the best possible solution for their need/want. Limited decision making is somewhere in the middle in the sense that there is a certain amount of search done, but habits and heuristics may play a larger role.

In regards to the survey we conducted, we asked "Have you heard of any all women outdoor recreation programs in your area?" (Q12) to which 43% of respondents chose yes and the other 57% chose no. We then asked those who said yes to indicate what programs they had heard of (Q13), to which 28.5% of respondents of that question indicated that they had heard of Shifting Gears. Other responses included "women's ski day", "YMCA women's climb", "WWU outdoor center womxns mtn biking excursion", "PNW outdoor women Bellingham", and "women's rock-climbing groups". When people are familiar with something and have made the decision to participate in that thing, they become significantly more likely to choose to participate again due to their prior exposure with it. These choice alternatives that were mentioned indicate what was in the participants' *evoked* set, since these women's outdoor recreation programs were what came to the participants' minds when asked what groups of this category, they were familiar with. This does not inherently indicate that these programs were in participants' *consideration* sets as we do not know their perceptions and attitudes towards them, but Q14 of our survey could potentially give some insight on this issue. Question 14 asked "Would you be interested in joining an outdoor recreation group with other women?" to which 76% of respondents chose either "very interested" or "interested". It is reasonable to infer then that those people who are interested in joining an outdoor recreation group with other women would consider joining the groups they listed that they were familiar with. Those who are familiar with these groups *and* interested in joining a women's outdoor recreation program likely include the listed groups in their consideration set.

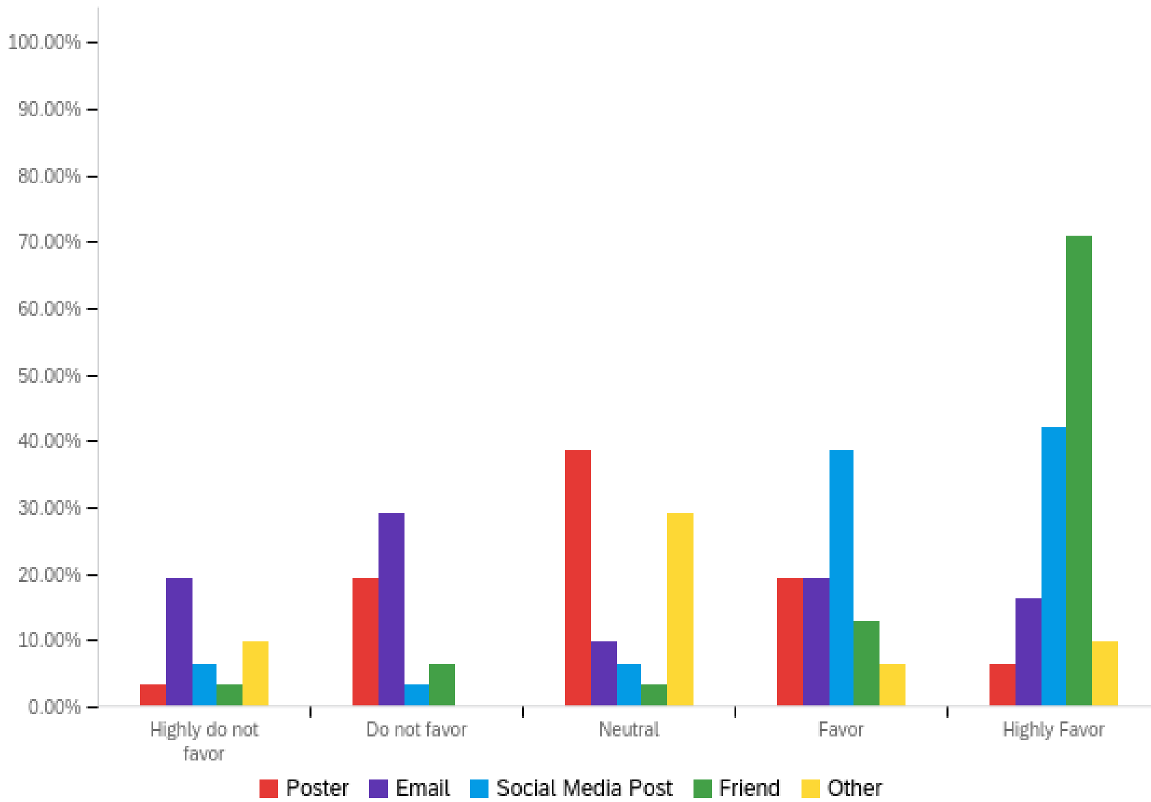
This data is also related to habits and heuristic thinking, that both work to speed up the decision-making process. Question 7 of the survey asked "Do you participate in any outdoor recreation programs/groups?" to which 18% of respondents said yes. The next question (Q8) followed this up by asking those who said yes to list what programs they participate in. The responses included "weekly women's skiing", "intramurals/hiking", and "Cascadia climbers club". While some types of purchases are rare and only necessary every so often, such as buying a car or buying new clothes (assuming you aren't a daily shopper), some consumption decisions are made weekly such as filling your car with gas or buying groceries.
The response "weekly women's skiing" brings up that many outdoor recreational activities are done on a weekly basis.

On Shifting Gears' website, they list various weekly events including biking and some seminars (Shifting Gears, Trips, 2020). With weekly events, participants can get in the habit of making the same consumption choice multiple times a month. Regarding heuristics, there are not really any notable mental shortcuts that consumers take when it comes to choosing outdoor recreation services - at least in regards to the data we collected. People certainly have habits and preferences in these fields which will lead people to make similar consumption choices, but these are not necessarily heuristic qualities. For example, a very common heuristic thought process is that something that costs more money must be high quality because of the price tag. Not only is this not always true, but many respondents of our survey indicated that they would be most driven to join an outdoor recreation program if it were free or had a low-cost. Perhaps this has to do with the convenience sample we took being comprised of mostly college students or those in college age who are notoriously low on disposable income, but in general people like to pay less for things.



A question from our survey (Q4) asked "It is your first-time hearing about an event… rank which is most likely to get you to attend", then had the participants rank the options of poster, email, social media post, friend, and other on a 1-5 scale. Of the 19 respondents, 12 of them ranked "friend" as their number 1 choice. Friends/peers have the potential to heavily influence people's consumption decisions and this is evidence to support that. Our survey data shows that friends were the most likely option to convince someone to attend an event, which might tell us that friends can speed up the decision-making process and move people from an extensive search to a nominal search. If someone has identified that joining a women's outdoor recreation program would satisfy a want/need for them and has already done a fair amount of research on the topic, a friend suggesting to try out a certain program could move someone straight to the purchase step of the process.

Another question (Q5) asked “What platform do you prefer to hear about events?” and had participants rank the options of poster, email, social media post, friend, and other between “highly do not favor” and “highly favor”. Of the 23 people who ranked the “friend” option, 16 ranked it as highly favorable. This is equivalent to 69.56%, which is a higher percentage than for any other option. Of those who listed something as “highly favorable”, “friend” made up 51.28% of the responses. It was also the most chosen combination of options (“friend” at “highly favorable”) of the question, with “social media post” being “favorable” coming in second place with 10



participants who chose that option.

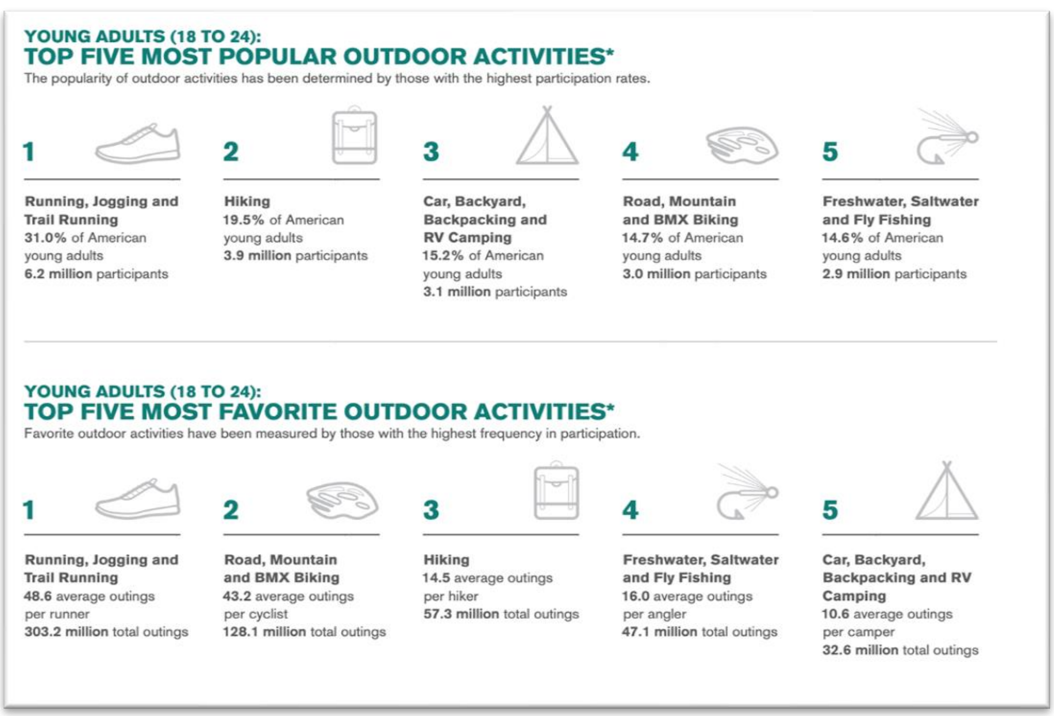
Involvement:

Product Involvement:

Product involvement is a consumer's level of interest in a particular product (Solomon, 2015, pg. 43). There are multiple questions in our survey that relate to how active/involved our respondents are to various outdoor activities. Shifting Gears offers mountain/road biking and hiking programs for women of all skill levels so we asked how often they participate in outdoor activities during the year in our survey to gauge their involvement levels with each sport (Q6).

When it comes to biking, most of our respondents have never participated in mountain or road biking. 86.36% in mountain biking and 63.64% in road biking showing that there is a low involvement rate for that particular activity. In a study of the outdoor industry association in 2019, biking was considered 2nd in young adults most favorite activities, but ranked 4th in the most participation (OIA, 2019).

High involvement in sports relates to how active, invested, skilled, and knowledgeable consumers are to a certain sport. Since biking is a highly involved sport, many beginners might feel overwhelmed with how to get started. Consumers looking to learn a new sport will start to look at the outdoor education industry for guidance on how to get their needs and wants fulfilled.



Message Involvement:

A great way for consumers to get involved in making decisions is through the message of a brand or company. Shifting Gears makes their message loud and clear on the front of their website creating awareness to all consumers who come across their non-profit (Shifting Gears Homepage).

Our inclusive cycling and hiking programs focus on breaking down barriers that stand in the way between a person and their aspirations. By participating in Shifting Gears programs, community members walk away with the tools that they need to attain their recreational goals. Whether it be learning how to change a flat tire, cycling 50 miles, locating accessible trails, finding a hiking partner, setting goals or just remembering how to "play," our aim is to create a welcoming environment for all to join in and learn.

There are various different ways for companies to express their message and get consumers to be more involved. They can stem from advertisements, social media posts, or even celebrity endorsements. Reaching an audience that resonates with a brand message can increase a consumer's level of involvement in the company if they feel their values are being represented properly. In our survey, we showed Shifting Gears message and asked them if they agreed or disagreed with the statement (Q19). 54.55% strongly agreed, 22.73% agreed, and the rest of the respondents took a more neutral stance on the company’s values.
Since this is a very small sample size based on our survey, we can’t accurately make any definitive statements on the data collected but we can note that Shifting Gears message does resonate with the majority of the respondents that we collected from around the Bellingham or surrounding area.

Problem Opportunity/Need/Recognition:

Problem recognition of the outdoor recreation industry and Shifting Gears occur when consumers experience a significant difference between their current state and their ideal state. The difference between need and opportunity recognition is small but it's largely related to the consumers and their internal/external awareness of services provided by Shifting Gears.

An opportunity recognition develops when a consumer wants to increase their ideal state and try new opportunities in the outdoor recreation industry. When there is an increase, consumers will recognize an opportunity to get themselves to their desired state which is where Shifting Gears can offer solutions. 76.19% of our respondents were interested in joining an outdoor recreation group with other women showing an increase in their ideal states. Problem with getting consumers to their ideal state is a lack of awareness of brands/services that can help guide them to their desires. We asked our respondents if they have heard about Shifting Gears, 80.95% of them haven't heard about the non-profit before taking the survey. The other 19.05% that have heard about the company heard about it through social media posts, event fairs, and one from a Backcountry Essentials Lady's Night.

When a consumer is no longer satisfied with their actual state, a need recognition develops which results in a decrease of that state. 51% of all US outdoor recreation industry consumers are women based on a 2017 survey done by the OIA. (OIA, 2017).

Even though women are more active in the industry, it could be daunting to join outdoor programs dominated by other genders and skill levels. When asked about programs offered by Shifting Gears to be daunting or exciting, the mean was 4.22 on a 7-point scale showing that most people were very neutral about the programs offered (Q17).

Fortunately, women are finding themselves more comfortable participating in outdoor programs if it's an all women program compared to a co-ed one. 90% of women in our survey agreed that they would feel more comfortable in programs structured this way showing that there's a clear demand for what Shifting Gears offers as a service (Q18).

Evaluation Criteria:

With more access to the outdoors than ever before, consumers today must evaluate between the many different criteria that come with each option of outdoor recreation programs. The Evaluation Criteria they go through, is defined in our book as the dimensions we use to judge the merits of competing options (Solomon pg. 328; 2017). What those merits are and how important they are to our decision is dependent on the consumer and their thought process. The Survey we conducted helped shed some light on how consumers make these decisions regarding outdoor recreation.

Pre-Decision Factors:

Before choosing a program, consumers' perceptions of their possibilities are impacted by the way their options are presented to them. The movement of options from your evoked set to your consideration set is partly dependent on how you were informed of this option, as this sets up how we frame the option in our head. We wanted to gain more information on how consumers prefer to learn about programs and what would drive them most to join a program. We asked participants what platforms they would prefer to hear about events most? The survey found that about 70% of responses for this question said learning from friends would be highly favorable, with the next most favorable being a social media post. While this might be their preferred way of discovering events, that does not always mean it would make them most likely to attend. We wanted to learn more about what would get an option from the evoked set to the consideration set. We Asked respondents the question "it's your first-time hearing about an event… rank which is most likely to get you to attend?" The results again showed that learning of an event from a friend would drive someone the most to attend with about 63% of respondents ranking it first.

It was again followed by a social media post with 21% ranking it their first choice and 47% ranking it their second. Evaluating criteria begins with how ones discovers their options, as this will have an impact on how you consider each option. Our findings show that the most beneficial way to learn of events is through word of mouth from friends and social media posts

Activities and Group Set Up:

After we have learned of our options, we then must differentiate them. One thing that we have learned in class is that the criteria that differentiates products/services carry more weight than the criteria that shows similarities (Solomon Pg. 328, 2017). As consumers, we want to focus on the differences between the programs as this will help us separate them and decipher what is most important to us. Two of the main differentiating criteria for outdoor programs we found were the activities offered and group set up. When choosing an outdoor program, different people are going to want different options in it. An avid hiker is going to want to join a group that offers beautiful hikes while vice-versa, someone who bikes every-day is probably looking for a program with some long bike rides. These activities, the ones a program offers, would be defined as a determinant attribute or a feature that we use to differentiate a program from another. In our survey we asked participants which outdoor activities do they participate in the most? Our results showed that the most common outdoor activities were hiking, camping, and snow sports with almost ⅓ of respondents saying they hiked often and 28% of respondents saying they camped often. While ⅕ of respondents said they participated in snow sports very often.

Research has shown that women get a better group experience out of an all women group than Co-ed. It is described as a more relaxed, less competitive, and more group-oriented atmosphere than co-ed programs (Hornibrook, Brinkert, Parry, Seimens, Mitten, Priest, 1997). Knowing this we wanted to get our participants opinions on an all-women's outdoor recreation program and whether something all women would drive them to join a program. We first asked them if they would be interested in joining an outdoor recreation group with other women? Around 75% said they were either interested or very interested in joining a group with other women. This told us that having other women in the group is important to their decision. But We also wanted to see how an all women program compared to a Co-ed program. We asked them to describe how much they agree with the statement “An all-women's outdoor program makes me feel more comfortable to participate in comparison to a Co-ed group.”

Our findings showed that a whopping 80% of respondents strongly agreed or agreed with this statement. This survey backs up the research that women feel more included and comfortable in an all women setting and that this is an important aspect when evaluating their outdoor program options.

Drivers:

A small proportion, about 18%, of our survey indicated that they were already involved in an outdoor program/group. With so many respondents not already involved in a group, we wanted to ask them what would drive them to participate in an outdoor recreation program? This would give us some insight on some of the important aspects people consider in the first steps of choosing a program. Price and transportation were the most common answers which is a common-criteria for most consumption decisions and would impact most purchase decisions. We knew that already, but what surprised us was that the third most common answer was inclusion and a friendly environment. Women feel more included in all women groups, and describe the atmosphere as more-friendly and less competitive than co-ed groups (Hornibrook, Brinkert, Parry, Seimens, Mitten, Priest, 1997). It is apparent from our survey that an important-criteria for women choosing a program is participating in an all women environment, where they feel included and most comfortable.

Evaluating Shifting Gears:

Aside from the offerings and set up of the programs, Consumers care about what the program represents and how much they align with it. With boycotts and cancel culture being larger than ever before, a program must differentiate itself not just in its offerings, but in its message and overall goal. We wanted to gain some more information of how much people align with Shifting Gears and their general opinions of them. We asked them a series of questions describing their opinions on shifting gears. As a team we asked them whether they would describe the programs offered by shifting gears as daunting or exciting? About 52% of the responses described it as more exciting than daunting, while about 14% of the responses were neutral. We then asked for them rate how much they felt the programs were "for them" rather than "not for them"? Only 21% of the respondents described it as more "not for them" with the vast majority describing their programs as "for them." Finally, we wanted to get their opinions on both the selection of programs and how expensive they found them.

Most people found the selection pretty neutral meaning they did not feel there was a limited selection of choices but that there could be room for more. With regards to how expensive they found the program more than half, 52%, found the programs inexpensive with 26% of responses describing it as neutral.

The respondents had generally positive opinions towards the offerings of shifting gears, describing it as exciting, inexpensive, and "geared" towards them. All of these parts of the criteria they will evaluate when selecting a program and are important to understand from a marketers' standpoint

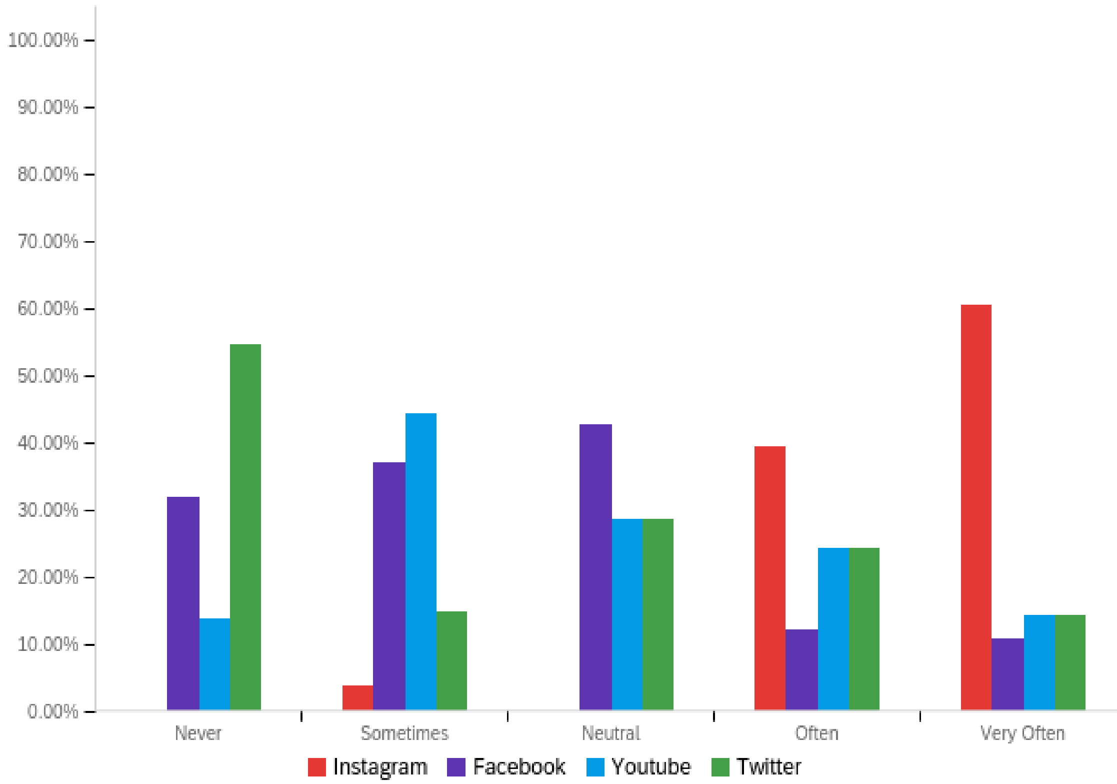
Stated earlier, it's not just the offerings that go into evaluating criteria. Consumers choose brands/programs heavily off of how they align with the company and how much they agree with its mission. Many people use a non-compensatory rule when evaluating a program's mission. What I mean by this is that there is no compensating for a program with a mission statement that consumers do not align with. As research and our survey have shown, the atmosphere of the program is a huge part of the criteria people evaluate when choosing a program. A huge part of that atmosphere is the goal or mission of the program, and how they gear the program to accomplish that goal. Shifting gears mission statement is this, “To create welcoming recreation experiences that encourage confidence, wellness, growth and joy”. We wanted to learn more about how this resonates with consumers and whether they agree with this statement or not. When asked whether they agree with the statement, a whopping 77% of respondents claimed they either agreed or strongly agreed with the statement. Although Shifting gears has faced some backlash about clarifying their mission statement, largely by our class, they still have a goal that resonates strongly with women. An aspect of the program that may end up giving them a slight edge when consumers go through the evaluation of criteria process.

Sources of Information Used in Making the Decision and The Role of Others in the Process:

Female gender between the ages of 18-35 participate in outdoor recreation programs to improve and maintain their personal health and fitness. These activities can involve the development of a wide range of physical skills such as hiking, mountain biking, road biking, camping, snow sports, rock climbing and many others. These skills represent the skills we have used in the marketing research survey, question 6.

Women report different exercise habits and reasons for exercise. Given that quality of life is affected by these habits and reasons (Craft, 2014). A common factor is that women prefer a different type of exercise than other women and are more likely to participate in an outdoor recreation program that involves the same gender.
Conversating a person and their friend seems to be a great alternative to having to work by yourself, specifically for the female gender. Women are more inclined to work with friends based on our survey data. 70.83% of our respondents highly favored hearing about outdoor recreation events through a friend. Friends are people that know you the best and can trust. When they recommend a program to you, that is a huge influence on your decision-making process solely based on your connection to the person.

Although the majority of respondents like to be recommended by a friend, social media is a huge source of information in 2020 and will continue to be in the future. Our survey helped distinguish what types of outside sources consumers use daily in making decisions and analyzed our findings through Qualtrics. We found that 96.15% of our users use Instagram often or very often. Although our survey was distributed through a small sample, Instagram is still rated as one of the highest social media apps within ages 18-24. A study done by the PEW research center was conducted on the age ranges and usage of various social media apps in the United States. "There are substantial age-related differences in platform use. This is especially true of Instagram and Snapchat, which are used by 67% and 62% of 18- to 29-year-olds, respectively" (Perrin, 2019)



The data above shows the rest of our surveys data related to social media usage. Most of our respondents are between the ages of 18-24 showing lots of usage in Instagram. Influences in the decision-making process rely heavily on how consumers get their information. Once the problem is recognized by a consumer their external sources become the next step in the decision-making process through information search. Marketers can use this consumer behavior to help fulfill consumer needs and wants. Shifting Gears has a Facebook and Instagram page that are very active in helping consumers face their information search issues in the decision-making process. From our respondents, Twitter is the least most used social media platform, however this survey is not representative of Shifting Gears entire target market.

Social, Cultural, and Economic Factors Used in Making the Decision:

Of those surveyed 100% answered “Yes” to using social media (Q2), and of those surveyors, 63.16% ranked “friends” as the factor most likely to get them to attend an event, and 47.37% ranked a “Social media post” as the second most likely factor to get them to attend an event (Q4). From this data, a hypothesis can be made that reference groups and social media both have a large impact on a consumer’s decision to participate in an activity.

The term "friends" indicates an informal reference group. "We gauge what is normal and expected by paying attention to our reference group, and then we reproduce those norms in our own consumer choices and appearance" (Crossman, 2019). Reference groups can deem whether or not an activity is worth participating in. Social media furthers this concept. It is a place where reference groups can easily vocalize their opinions, values, and put on display their consumer choices. For example, a friend of yours could buy a new pair of sneakers, and upload a picture on Instagram wearing them, they look great and now you want to buy a pair. Or they could post a photo of an event they attended the night before, and suddenly you are wondering why you weren't at that event and if it was any fun. "The fear of missing out (FOMO) has become pervasive in society. Teens and adult's text while driving, because the possibility of a social connection is more important than their own lives" (Grohol, 2018). FOMO may explain why friends and social media both ranked higher in question 4 of our survey than any of the other options. A person's age and gender have a number of social influences on consumer behavior. From the information gathered in the survey there are a few things to be noted.

1) When asked what would make the surveyor want to participate in an outdoor program response consisted of: "friendly people", "women in the same age group", or "a friend" (Q11).

2) When asked specifically if they would be interested in joining an outdoor rec group with other women 28.57% responded with "very interested", and 47.62% responded with "interested", while only 9.52% responded with "not interested at all" (Q14).

From this data, it can be inferred that not only are the majority of women interested in doing these activities with other women, but in doing so it would actually make them more likely to participate in the activity in general.

It is important to have an inclusive outdoors environment. "Not every outdoor enthusiast is an extreme athlete, white, and male, yet that's nearly always the image displayed as the model for outdoor enthusiasts" (Baker, 2017). When asked about personal experiences, only 4.76% of surveyors found the outdoor recreational community to have been "very inclusive", 38.10% have a neutral standpoint, and 33.34% said either "not inclusive" or "very not inclusive" (Q16). People are often unaware of the ways in which their beliefs affect their behaviors, and in result can create an exclusive environment. "Culture is the 'lens' through which people view products" (Solomon, 2015, p. 79). Right now, the "need for greater respect and opportunities for women is becoming an ever more prominent feature of the public conversation" (Lagarde, n.d.). The lens for which women are viewed in the outdoor recreational community must be changed. Until then, there will continue to be barriers in the outdoors industry that make it difficult for women to participate. Because 54.55% strongly agree, and 22.73% agree with Shifting Gears mission statement, we can infer that there is a real desire to make the outdoors more inclusive for women amongst women (Q15).

Going back to Q11 of the survey, the most frequently mentioned factor when asked what would drive them to participate in an outdoor program, was if it was either free or a low price. Q24 asks what their annual income is and 61.90% responded with <$10,0000. When later provided with a list of Shifting Gears programs and prices 26.09% felt neutral about price, and 52.17% felt it was more inexpensive than expensive (Q17). It is important to note here that the low price is very need based as the majority of surveyors made less than $10000 a year, and even with that they were still either satisfied with or indifferent about Shifting Gears prices. "Consumer demand for goods and services depends on both our ability and our willingness to buy" (Solomon, 2015, p. 456). So even if the price is right the question still remains "to spend or not to spend" (Solomon 456). The problem with the majority making less than 10,000 a year is that even if prices are considered low, a low cost is still a cost, and costs add up. When you are in college, every penny counts. Ever hear the term a penny saved is a penny earned? And in a sense that penny is worth more to you than someone making more money. You will be less willing to spend money even if that cost is a small cost. Which is why the second part is so important. Willingness. Millennials have put an emphasis on experience-based purchases. "A study by Harris Group found that 72 percent of millennials prefer to spend more money on experiences than on material things" (Uptin, 2016). Thus, millennials are more *willing* to spend money on experiences. "Research on the relationship between consumption and happiness tends to show that people are happier when they spend money on experiences instead of material objects" (Solomon, 2015, p. 459). But the problem with the theory is that it does not apply across all income groups. For lower income consumers, "spending money on concert tickets or a weekend trip might not result in greater happiness than buying a new pair of shoes or a flat screen TV," (Malito, 2018). All of these factors have an effect on the consumer's decision.

Shifting Gears Survey:

Start of Block: Warm-Up Questions Block

Q1 **What gender do you identify as?**

○ Male (1)

○ Female (2)

○ Prefer not to say (3)

○ Other (4) ____

Skip To: End of Survey If What gender do you identify as? = Male

Q2 Do you use social media?

○ Yes (1)

○ No (2)

Q3 What social platforms do you use the most?

	Never (1)	Sometimes (2)	Neutral (3)	Often (4)	Very Often (5)
Instagram (1)	○	○	○	○	○
Facebook (2)	○	○	○	○	○
YouTube (3)	○	○	○	○	○
Twitter (4)	○	○	○	○	○

Q4 **Its your first time hearing about an event... rank which is mostly likely to get you to attend**

_______ Poster (1)
_______ Email (2)
_______ Social Media Post (3)
_______ Friend (4)
_______ Other (5)

Q5 What platform do you prefer to hear about events?

	Highly do not favor (1)	Do not favor (2)	Neutral (3)	Favor (4)	Highly Favor (5)
Poster (1)	o	o	o	o	o
Email (2)	o	o	o	o	o
Social Media Post (3)	o	o	o	o	o
Friend (4)	o	o	o	o	o
Other (5)	o	o	o	o	o

End of Block: Warm-Up Questions Block

Start of Block: Transition 1

This next set of questions will ask you about your personal experiences with outdoor recreation.

End of Block: Transition 1

Start of Block: Outdoor Recreation Questions Block

Q6 How often do you participate in outdoor activities during the year?

	never (1)	sometimes (2)	neutral (3)	often (4)	very often (5)
Hiking (1)	○	○	○	○	○
Mountain Biking (2)	○	○	○	○	○
Road Biking (3)	○	○	○	○	○
Camping (4)	○	○	○	○	○
Snow sports (5)	○	○	○	○	○
Rock Climbing (7)	○	○	○	○	○
Other (8)	○	○	○	○	○

Q7 Do you participate in any outdoor recreation programs/groups?

○ Yes (1)

○ No (2)

Display This Question:

If Do you participate in any outdoor recreation programs/groups? = Yes

Q8 If yes, please indicate which program or group you attended?

____

Display This Question:

If Do you participate in any outdoor recreation programs/groups? = Yes

Q9 How did you hear about the program/group that you attended?

- ◯ Poster/Flyers (1)
- ◯ Social Media (2)
- ◯ Email (3)
- ◯ Friend (4)
- ◯ Other (5) ____

Display This Question:

If Do you participate in any outdoor recreation programs/groups? = Yes

Q10 Please respond to the following statements about the program/group you attended

	Strongly agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree

	0	1	2	3	4	5	6	7
I felt prepared for the program/group ()								
I connected with at least one person ()								
I felt satisfied with the company's service ()								

Display This Question:

If Do you participate in any outdoor recreation programs/groups? = No

Q11 If not, please indicate what would drive you to participate in an outdoor recreation program.

____

Q12 Have you heard of any all women outdoor recreation programs in your area?

- Yes (1)
- No (2)

Display This Question:

If Have you heard of any all women outdoor recreation programs in your area? = Yes

Q13 If yes, please indicate what program

____

Q14 Would you be interested in joining an outdoor recreation group with other women?

- Very interested (1)
- Interested (2)
- Neutral (3)
- Slightly interested (4)
- Not at all interested (5)

End of Block: Outdoor Recreation Questions Block

Start of Block: Transition 2

The next set of questions will ask you about your knowledge and opinions of Shifting Gears.

End of Block: Transition 2

Start of Block: Shifting Gears Questions Block

Shifting Gears is a non-profit creating welcoming recreation experiences that encourage confidence, wellness, growth and joy.

Q15 Do you agree with Shifting Gears mission statement

- Strongly agree (1)
- Agree (2)
- Somewhat agree (3)
- Neither agree nor disagree (4)
- Somewhat disagree (5)
- Disagree (6)
- Strongly disagree (7)

Q16 in your experience, how inclusive has the outdoor recreational community been?

- very not inclusive (1)
- not inclusive (2)
- neutral (3)
- inclusive (4)
- very inclusive (5)

Page Break

Shifting Gears offers a range of services including mountain bike rides ($5-$12), road bike rides ($5-$12), group hikes (free-$30), overnight bike and hike trips ($50-$159), retreats, and workshops (free). Prices fluctuate based on external costs for the programs and duration.

Q17 Please check one space on each line to show your overall, general opinion on the programs offered by Shifting Gears.

	1	2	3	4	5	6	7	
	1 (1)	2 (2)	3 (3)	4 (4)	5 (5)	6 (6)	7 (7)	
Daunting	○	○	○	○	○	○	○	Exciting
Not for Me	○	○	○	○	○	○	○	For Me
Inexpensive	○	○	○	○	○	○	○	Expensive
Limited Selection	○	○	○	○	○	○	○	Wide Selection

Q18 an all-women's outdoor program makes me feel more comfortable to participate in comparison to a co-ed program

- ◯ Strongly agree (1)
- ◯ Agree (2)
- ◯ Somewhat agree (3)
- ◯ Neither agree nor disagree (4)
- ◯ Somewhat disagree (5)
- ◯ Disagree (6)
- ◯ Strongly disagree (7)

Q19 Have you heard of Shifting Gears before this survey?

- ◯ Yes (1)
- ◯ No (2)

Display This Question:

If Have you heard of Shifting Gears before this survey? = Yes

Q20 If yes, where did you hear about the business from?

- ◯ Poster (1)
- ◯ Social Media (2)
- ◯ Email (3)
- ◯ Friend (4)
- ◯ Other (5) ____

End of Block: Shifting Gears Questions Block

Start of Block: Demographic Questions Block

Q21 How old are you?

____

Q22 What is your racial or ethnic identification?

- ○ White (1)
- ○ Black or African American (2)
- ○ American Indian or Alaska Native (3)
- ○ Asian (4)
- ○ Native Hawaiian or Pacific Islander (5)
- ○ Other (6)

Q23 What is the highest degree or level of education you have completed?

- ○ Less than high school diploma (1)
- ○ High school diploma or GED (2)
- ○ Some college, but no degree (3)
- ○ Associates Degree (4)
- ○ Bachelor's Degree (5)
- ○ Master's Degree (6)
- ○ Doctorate (7)
- ○ Other (8) ____

Q24 What is your annual income?

- ○ (1)
- ○ $10,000 - $30,000 (2)
- ○ $30,000 - $50,000 (3)
- ○ $50,000 - $70,000 (4)
- ○ $70,000+ (5)

Q25 Do you live in Bellingham, Washington or the surrounding area?

- ○ Yes (1)
- ○ No (2)

Display This Question:

If Do you live in Bellingham, Washington or the surrounding area? = No

Q26 If no, please indicate which state and city you live in

____

End of Block: Demographic Questions Block

The purpose of this section was to gain knowledge on consumer behavior that would be useful when developing recommendations for Shifting Gears. We used data collected from the survey to further our understanding on consumer behavior.

In the usage section we analyzed three different categories of usage, purchase triggers, purchase frequency, and switching behaviors. We found that people are more likely to participate in outdoor recreation services as a social event, when it is cost effective, and conveniently located. Furthermore, we found that consumers who will participate in outdoor recreation services most frequently are also going to be the highest engaged demographic in the outdoor community. Finally, consumers will look for new outdoor recreation services if the current provider does not meet their needs. Or, since Shifting Gears offers a host of free services, the consumer may participate in several different providers services.

Price and transportation were the most common answers when identifying barriers to using outdoor recreation services. Even if these barriers are overcome there are still other driving factors for making purchase decisions. Women feel more included in all women's groups, and describe the atmosphere as more-friendly and less competitive than co-ed groups. This is great for shifting gears, since they provide only women's programs.

When choosing brands/programs consumers choose heavily off how they align with the company and how much they agree with its mission. So, it is not just the offerings that go into evaluating criteria.

We also wanted to gain more information on how consumers prefer to learn about programs and what would drive them most to join a program. Our survey showed that most consumers prefer to learn about programs through social media posts, and word-of-mouth (ie. their friends). Specifically, the top two social media platforms were Instagram, and YouTube for receiving information. Reference groups, and social media both have a large impact on a consumer’s decision to participate in an activity.

This next section will be the culmination of our research in the form of a firm analysis and recommendations.

Shifting Gears Firm Analysis and Consumer Perceptions:

Value offered to attendees & clients Mission, Positioning, Value Proposition:

Shifting Gears is a non-profit organization with a vision of creating a cycling and hiking community where all people recreate with confidence and joy. They offer women only hiking and biking programs working towards creating an inclusive community for the people of Bellingham. Shifting Gears mission statement clearly defines this purpose "To create welcoming recreation experiences that encourage confidence, wellness, growth and joy".

Consumers are offered the value of the programs/services themselves, but Shifting Gears brings much more added value towards their non-profit through their mission statement and company goals. They have defined three main goals so they can effectively reach their mission. Goal #1 is to enhance the joy of recreation, and improve the confidence and competence of beginning cyclists/hikers. Goal #2 is to bridge the gap to access recreational opportunities for marginalized populations. Goal #3 is to lead and instill a culture of respect and passion throughout our cycling and hiking community.

They are providing this value and working towards their missions through their outdoor recreation programs that are offered throughout the year. Not only are the programs adapting to community needs by having them women only, but they are creating a welcoming and respectful space for people of all skill levels to enjoy the outdoors. The value offered goes beyond the services themselves which becomes a driving factor towards consumers looking to join. Creating that welcoming community of women enjoy and experience outdoor recreational sports together is what this company is all about and there's a lot of value offered within that space.

Shifting Gears positions themselves as a Bellingham run non-profit because they understand the Bellingham community when it comes to the importance of recreation and its physical and mental health for all. Bellingham is a college town for Western Washington University and is very populated with a good variety of age groups that fit within their target market. This area is an important position for the company to operate in because of the diverse, open minded, and outdoor community that is active in the PNW.

Target market:

Shifting Gears is currently targeting women ages 18+ to be joining their outdoor recreation programs. This is their intended audience for these events so they can reach their mission statement/goals and create that inclusive community that they have built their brand around. Since the company hasn't segmented their age groups for specific targeting efforts, they get a wide range of ages attending events. This is in line with the company values as they want to create a welcoming environment for every age group.

Shifting Gears has stated in our client presentation that they are looking to expand their target market once the company reaches their goals. As of right now, they are only looking to reach out to women and LGBTQ+ communities who want to experience these outdoor recreation sports with a welcoming and respectful community. This is their primary target market for their programs at the moment but they want to reach a wider audience. Their desired target market includes opening themselves for all genders so they can be in line with their company values even more. Shifting Gears believes that the outdoors **has** to be accessible to all and that it's a right not a privilege. Every human deserves access to the resources that is recreation and they are going to be working more towards those messaging values. First, they are currently focused on bridging that gap between the genders and making recreational opportunities for marginalized populations more accessible through their current target market before they expand.

We believe that these strategies are an important aspect to the brand of Shifting Gears and we don't want to be taking that away. With that being said, we do think that some of the aspects towards the company's target market isn't reaching its full potential and we will discuss more about this in our Marketing/Recommendations sections below.

Branding Strategy and Perception:

Shifting Gears main long-term goal is not market share or profits, but rather to systematically change the non-inclusive environment that the outdoor recreation industry currently holds. Their mission is clear, to create welcoming recreation experiences that encourage confidence, wellness, growth and joy. In order for the brand to grow there needs to be adequate room for growth in the environment. Nadine and Shifting Gears saw a problem with inclusivity in outdoor recreation, and their goal of solving that problem is at the root of their brand. Joining Shifting Gears is not just joining another program, but rather progressing towards a goal of equality and fairness to all.

The brand advantage that Shifting Gears post is that they are one of few all women outdoor programs in the area. We found in question 18 that our respondents felt much more comfortable in an all women's outdoor program than a co-ed one. This is backed well by research that an all women's program has been found to be more inclusive and friendly and less competitive (Parry & Mitten, 1997). Shifting Gears displays this benefit by adding the testimonials from their participants on their homepage, which talk about how the group made the experience less intimidating and more comfortable for them. Although there are a few other programs in the area that offer all women programs, Shifting Gears has an advantage in the variation and frequency of their excursions and events. As their Facebook indicates, they host an abundance of possible outings to either participate in outdoor activities or socialize like the "Sippin' on Cider" event.

In our survey we found information about the current perceptions and attitudes towards shifting gears and their programs. In question 17, we wanted to get the general opinion people had on shifting gears and the programs that they offered. We found that the majority of our respondents found shifting gears programs to be exciting, had a wide selection of options and events, and described the programs as for them or something they felt they could participate in. But when we asked whether they felt the programs were inexpensive or expensive, the respondents leaned more towards expensive. So although people find the programs enjoyable and is something they could see themselves doing, cost seems to be a barrier of entry and is preventing many possible participants from joining the program.

As mentioned earlier, the heart of shifting gears as a brand is their mission statement. Because of this, we wanted to see how people viewed this mission statement and whether it would be a good staple point of their brand. In question 15, we asked how much our participants agreed with shifting gears mission statement? We found that over 75% of the survey either agreed or strongly agreed with their mission statement.

Consumers overall have positive perceptions of shifting gears and their mission statement. But as we have learned behaviors and intentions don't always lead to action. So, despite these positive perceptions, consumers still face some barrier to entry like cost that prevent them from joining the program.

Pricing and Perception:

Shifting Gears is one of a few women's only mountain bike focused business or club local to Bellingham. The others include the Joyriders and Queens of Dirt. The Joyriders is a club for women that focuses on diversity in the biking community. They host free rides twice monthly. The Queens of Dirt are a women's mountain bike race team that also offers mountain bike clinics ranging from $150-$350 depending on the participants age.

Shifting Gears offers a variety of different trips, retreats, and day activities for their customers. Their weekly mountain bike outings are free and open to all ability levels. They also offer day biking trips that cost between $5-$12 depending on the amenities included. The cost will cover things like food or ferry tickets. Shifting Gears, while focused on biking, also offers single day and multi-day hiking tips that range from $30-$150. On top of their trips and retreats, Shifting Gears puts on seminars and workshops that are free and open to the community. Finally, Shifting Gears does a few fundraisers throughout the year that cost around $25-$30 for entry.

From our primary research we found that 78.26% of our respondents thought that services offered by Shifting Gears were between inexpensive and neutral. The mean response regarding price for services was 3.35 indicating that respondents found the price of services to be on the inexpensive end of the spectrum (1=inexpensive, 7=expensive). While our sample is not representative of Shifting Gears' target market, we can generalize this finding by concluding that Shifting Gears offers cost effective services (Q17).

Compared to the Joyriders, Shifting Gears offers more frequent free rides presenting greater opportunity for customers to attend. While Queens of Dirt offers expert coaching, their courses are much more expensive than Shifting Gears, starting at $150 and capping at $350. Queens of Dirt, however, still fills all available spots for their courses which tells us there is a market for more expensive mountain bike courses.

We know that price can affect a consumer's perception of the service and how they make a decision. Oftentimes consumers believe that a higher price translates to a higher quality of the service or product. This is untrue most of the time and is a commonly misused short-cut, or heuristic, that consumers use when making decisions. In the context of Shifting Gears, we found that many of our survey respondents noted that a cheap (or free) cost for these services would in fact motivate them to attend an event more (Q11).

Monetary concerns are a barrier of entry to the use of outdoor recreation services as we have discussed previously. Shifting Gears has a strong position in the local outdoor recreation services industry due to the wide range of prices and trips they offer. Beyond the actual event itself, Shifting Gears has a fleet of used gear, besides bikes, that can be used on their multi day or single day trips for customers who do not own or are unable purchase the required gear. This creates accessible experiences for potential customers who may not be able to financially justify using a service like Shifting Gears.

Advertising/Promotion and other Communication Strategies:

Shifting Gears hosts a wide range of advertising, communication and promotion strategies that are available year-round. Some of the fundraisers that Shifting Gears offers are:

- February: Wild Womxn Adventure Night
- March: Wild Womxn Dirt to Indulgence
- May: Bike Swap
- May-June: Fundraising Campaign
- September: Sippin' on Cider: cider tasting festival
- November-December: Online Silent Auction

Within the scope of Shifting Gears, they also host micro services such as:

- Garage Sale
- Adult Swim Club
- Bike Corrals (RSVP, Seafest, Martin Luther King)

All of these activities are found on www.letsshiftgears.com (website), including pictures from each of these events. Shifting Gears also offers seminars in which are open to the public, giving females an opportunity to talk about themselves within the nature of the outdoors. Listed below are some of the seminars that Shifting Gears offers:

- October: Injury prevention workshop
- November: "let's talk about fear and the outdoors."

Potential Seminars for 2020:

- Bikepacking Panel: connect with womxn who will share their tips adventuring in this fringe sport
- Womxn on Trails: find inspiration from womxn who have explored a trail, whether water, dirt or sky
- Womxn Traveling Solo: find inspiration from womxn who embrace traveling solo

Shifting Gears has resources available for you at hand. They have a spectrum full of various advertising services that they have used in the past and continue using today. These assets include the following:

- Website www.letsshiftgears.com
- MailChimp
- Posters
- Partnerships
- Tabling
- Word of Mouth

- Instagram(s) @letsshiftgears, @power.Bellingham
- Facebook

Social media plays a huge role in advertising, communication and promoting Shifting Gears. Shifting Gears Instagram (@letsshiftgears) holds around 728 followers, and follows around 257, in which they have 117 posts. The other account that they have @power.Bellingham on Instagram, has a total of 106 followers, and currently follows 38 of them. They have about 15 posts. Facebook comes around at 1270 followers, and 1167 likes. Notice, that followers and likes are about the same which means that most of the people that are following them like the content that they are posting.

Marketing and Brand Recommendations:

Recommendation 1: Refine Target Market

Shifting Gears target market is broadly defined as people who self-identify as women, trans, femme, or non-binary ages 18-100 years old. We think that it's important for the company to continue their vision by creating an inclusive environment for women to feel comfortable in the outdoor space and we don't want to stop that. We feel that Shifting Gears should set aside resources to focus on targeting more towards the college students of Bellingham. Western Washington University has a big population of students ages 18-24 who enjoy participating in outdoor recreation activities. This would be a productive segment in the companies already defined target market to expand into more. Shifting Gears programs offer lots of value towards their clients and we think that value would directly translate towards the students of WWU. We still think that it is important for Shifting Gears to continue to target their current target market and to just include college students as another segment to focus towards. The college students of WWU are the most likely to be joining outdoor recreation communities especially if they are with a company that has a strong sense of value. In our survey, we asked our sample population what they thought of Shifting Gears mission statement, 54.55% strongly agreed and 22.7% agreed with the statement. The majority of our sample were WWU women college students and shows that there is an interest in what Shifting Gears is offering to their consumers.

There are a few recommendations for how we think you should market to college students that we will discuss in detail below. These will be the best way to contact this segment to increase attendance and word of mouth for the company.

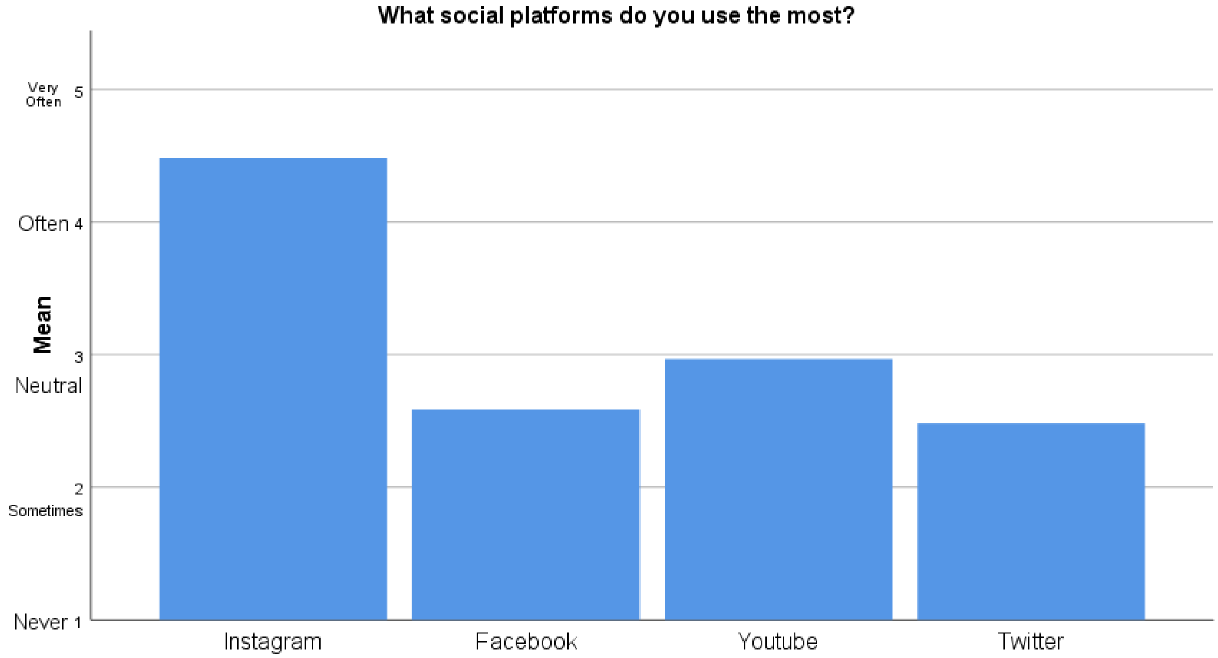
Campus Outreach:
A great way Shifting gears can target college students is to reach out to them right where they're spending the majority of their time. We believe that setting up a table in red square would be a great way to spread awareness and generate word of mouth. The table would be used to inform college students about shifting gears, their mission statement, and the benefits of joining an inclusive and welcoming program like shifting gears has to offer. Along with this there would be a sign-up available right there for upcoming excursions and events, as well as an email subscription list so they can stay up to date on what's to come. A big focus for shifting gears needs to be spreading awareness of the company. In our survey, which was comprised heavily of college students, we found that a very small percentage (19%) had heard of shifting gears before our survey. This is a problem as a huge segment of potential consumers is not even aware that they have an option to join a program in the area. The second step in the consumer decision process is evaluation of alternatives and it is imperative that shifting gears has enough brand recognition to be one of those evaluated alternatives. Not only would the table spread awareness for those able to stop by the stand, but also would generate some word of mouth among friends. We found in our survey (Q4, Q5) that the most preferred way to hear about events was from a friend. We believe that the best way to get college students talking about shifting gears is to insert the brand

where college students are most likely to run into people and start up a conversation. If shifting gears could insert themselves into the conversations of college students, it would increase both the amount of people and their conversion rate as this would be the most effective way to promote the brand. To further support this we also found in our survey that some of the main drivers that would get someone to join an outdoor recreation program is it being an inclusive and non-judgmental environment. This is a huge untapped market of underserved consumers in college students that are looking for a program like the ones Shifting Gears has to offer.

Event Incentives:
A couple of things we learned from those surveyed is that when choosing whether or not to participate in outdoor rec, the most common concern was price, and the most motivating factor to participate was if their friends were doing it as well. Shifting Gears was viewed as slightly more inexpensive than it was expensive, with the average of consumers rating it a 3.35 out of 7. (using a Likert scale 1= very inexpensive 7= very expensive). Since low-price is so important to college students, we need to find ways to lower this average. Offering promotional deals is a great way to bring down price, and in turn bring the average from slightly inexpensive to moderately inexpensive.

One of our ideas is to offer a $25 off an overnight/retreat if you bring a friend to attend a day trip (either a day bike or a day hike). This lowers price, and it also gives an incentive to not only attend a day trip, but to bring a friend as well. Thus, increasing attendance rates. In consumer behavior there is a method known as reciprocity. It is the idea that "we are more likely to give if we first receive" (Solomon, 2015 p.318). The survey showed friends are a strong motivating factor, so they are already more likely to attend if a friend is going, but on top of that we are also giving them a reward to do so. Reciprocity helps businesses create an ongoing relationship with consumers. It is the idea that "if you scratch my back, I'll scratch yours".

These promotions should be posted on social media, specifically Instagram but other platforms are important as well. Instagram is the most important as it is used significantly more often than the other platforms.



But also post it everywhere, on your website, on Facebook, etc. Your promotions should move seamlessly through all of your platforms.

Bike rental displayed on Shifting Gears Homepage:
Shifting Gears' homepage houses relevant information is very creative and displays various pictures from their past trips that they have gone on that we as consumers love to look at. A lot of the images that are displayed on their homepage are biking images and we think that it is important for the company to display on their homepage where a consumer will be able to get a bike from if they do not own one. Since a lot of trips/events people attend are based on biking, including a portion of their homepage where they are able to access a renter/loaner bike they can get their hands on would be a huge step to consumers because it is quick, easy and affordable. We noticed that we were able to get to a page that included information about this subject from the 'trips' tab that Shifting Gears offers on their online webpage. This recommendation is backed up from results on one of our resources that the school provides us with. University Reporter. The results we found are 28.72% of students that are in college own a mountain/road bike out of a base total of 70,694 students that identify as not owning their own bike. As a group we reached out to Shifting Gears through email asking if there was new information about how consumers can access a bike and recently, Shifting Gears has created a partnership with Transition Bikes for their weekly mountain bike rides that they will lend to people. This is still such new information so we do not expect it to be up on their site yet, but we suggest that Shifting Gears should make this accessible through the home page, making it one of the first things the consumer sees. We also see this as a barrier to entry for the consumer because it gives them the option to respond faster whereas other non-profit companies a consumer might be lost on this piece of information missing from their website.

Recommendation 2: Increase Digital and Physical Presence in Community

Tabling:
Word of mouth is an essential part of an event's success. In fact, in our survey we found that 82.61% of respondents either highly favor or favor hearing about events from a friend (Q5). We believe that tabling at local events could be extremely beneficial for Shifting Gears and increasing the community's knowledge about Shifting Gears and the events they offer. Tabling means setting up a promotional booth or table at an event and talking to individuals attending the event about your company. Oftentimes people who work the table will have informational hand-outs, freebies, and stickers for people to take.

Tabling is a common promotional strategy for companies in the outdoor industry to use. In fact, companies like NOLS (National Outdoor Leadership School) have a nationwide ambassador team that hosts tabling events year-round. Events that companies in the outdoor industry table at include outdoor film festivals, outdoor expos, outdoor recreation competitions (climbing, skiing, biking, etc.), along with several others.

As this relates to consumer behavior, we know that although people may show interest and/or like a product or service, it does not mean that they will purchase the product or service. Based on data from our survey, we found that 77.28% of our respondents either agree or strongly agree with Shifting Gears mission statement (Q15). Furthermore, 76.19% of our respondents reported that they were either interested or very interested in joining an outdoor recreation program with other women (Q14). So, while there seems to be interest in the programs that Shifting Gears offers, only 18.18% of our respondents reported that they had participated in an outdoor recreation program in the past (Q7). This tells us a few things, either potential customers are not aware of Shifting Gears or they are aware of Shifting Gears but are choosing not purchase their services. Tabling at local events can help remedy both of these problems.

Classical conditioning is a tactic that many businesses use to market their product or service. Essentially, the more times a customer hears about or sees the product or service, the more likely it is that they will begin to be aware of it. So, if Shifting Gears were to consistently table at local outdoor events, they are likely to be seen by the same community of people with some consistency. This would help increase awareness of Shifting Gears within the local outdoor recreation community. Furthermore, tabling at events can help persuade potential customers who already know of Shifting Gears services to purchase them in the future. Consistency is the concept that consumers "... try not to contradict themselves in terms of what they say and do about an issue" (Solomon, pg 318). If, for example, a customer who has prior knowledge of Shifting Gears were to engage with their table at an event, the next time they hear about a Shifting Gears service, they would be more likely to purchase or use it (this is assuming the customer has a positive brand image of Shifting Gears).

One barrier to tabling at events like these is getting in touch with the right contacts and getting permission to table at the events. We propose that Shifting Gears leverage their services as incentive for events to invite them to table. Many of the events that Shifting Gears might be interested in tabling at often have raffles for their customers that attend the event. Shifting Gears could offer a single spot on one of their overnight retreats as part of a raffle prize. This benefits the event holder as it adds monetary value to their raffle and it also engages consumers with Shifting Gears. Furthermore, Shifting Gears can offer their social platforms to event holders as a form of free advertising. In exchange for table space, Shifting Gears could promote the event on their social platforms.

Recommendation 3: More Diversity in Services Offered

While Shifting Gears has done a great job of offering a variety of events for their supporters to participate in, there are a plethora of other activities that they could offer to reach a wider audience. Adding these new events would likely help motivate new consumers who might otherwise not be interested in getting involved with Shifting Gears.

Based on information from the Shifting Gears website and Facebook page, there is an apparent drop in events offered during the winter season. Due to this, we believe that SG could benefit from hosting events for snowy/cold weather. One such activity that would be relatively inexpensive to set up would be a womxn's snow hike. Shifting Gears could invite womxn to come hike in the snow with them; the financial burden to setting this up would be regarding supplying snow shoes to those without a pair and perhaps also thick jackets to help participants stay warm. The Outdoor Center at WWU offers snowshoe rentals for an affordable price that Shifting Gears could utilize to make a snow hike excursion a reality. Another snow activity that SG could host would be ski excursions, although this would be more expensive to set up. Skis and snowboards are both also available to rent through the WWU Outdoor Center. Snow sport/hike excursions are two great ways to keep people involved with Shifting Gears during the winter months of the year.

Shifting Gears has heavily focused on biking excursions for womxn in the past, but we think it would make for an engaging event to host a womxn's bike skills training course at the new dirt bike "pump track" located in the industrial district of downtown Bellingham. The purpose of a pump track is for the riders to "pump'' their way through the course using their body weight as opposed to traditional pedaling. Since this is a technique that most casual bike riders are not familiar with, it would likely pique the interest of many new potential participants. Based off of past events that Shifting Gears has hosted, the close proximity between the pump track and Boundary Bay (<1 mile) could open the door for joint events. This could potentially be a "Bike then Beer" event where the 21+ participants all get together for drinks after the skills training session at the pump track.

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