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**SSL: Leveraging The Women's Opportunity in Snow Sports**

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## Who I Am - Tami Anderson



- 15 years consumer marketing experience with brands both large and small
- 7 years in the outdoor industry, 5 of them as marketing director for one of the first national women's sports apparel retailers
- Board member, Outdoor Industries Women's Coalition (OIWC)
- Author of M2W Trend Analysis Blog: andHow To Reach Women
- Co-founder & Principal of andHow



## Who We Are



**andHow** is a marketing consulting firm that specializes in helping companies increase their market share among women, and grow their sales overall.

We formed **andHow** because we believe that if companies would be willing to *listen*, set aside stereotypes and *clearly* and *consistently* communicate their brand values to their customer segments, they would be practically assured of success.

## What Do We Know About Sports?



**Elizabeth Howland and I were the marketing leaders at *Athleta*, one of the first national sports apparel manufacturers and retailers dedicated to serving women.**

**Since *Athleta* started in 1997, a lot has changed. All the major sports apparel manufacturers have dedicated women's divisions, several retailers have successfully entered the field and many outdoor brands have expanded their lines.**

**Still, the women's opportunity has yet to be fully realized.**

## What Do We Know About Women?



- **They are today's, and tomorrow's,** driving economic force.
- **They directly influence** the purchases of other key audiences (men, youth).
- **Their average spend** is higher and more frequent in most categories.
- **They have high standards** and expectations.
- **They defy generalization.**



## What We'll Cover Today



- *The Opportunity*
- *How Women Shop*
- *What It Means To Be A Great Women's Brand*
- *Getting It Vs. Not*
- *The Specialty Retailer Advantage*
- *Five Ways To Get Started Now*
- *The Secret*



## Today's Biggest Economic Opportunity



### Women...

- **Are responsible for 85%** of all consumer purchases in North America
- **Influence 95%** of household purchases, including
  - **92%** of vacations
  - **80%** of sporting goods and apparel
  - **94%** of home furnishings
- **Control 51%** of private wealth in the U.S., which is expected to increase to 60% or \$1 trillion by 2010
- **Are earning Bachelor's and Master's degrees** at a higher rate than men



## The Snow Sports Market—Women:

**Spent \$482 million** in 06/07 on snow sports apparel, equipment and accessories in specialty brick and mortar shops.

Women-specific products **grew 7.8% in unit sales and 5.7% in dollars** when the rest of the market remained relatively flat.

**Three of the top 5** selling ski models for 06/07 were female-specific skis, two designed for women and one for girls.

*Source: SIA Women's Intelligence Report, 2007*





## The Snow Sports Market—Women:



### The typical snow sports woman participant is

- 31 years old
- Engages in winter sports 10 days a year
- Holds a college degree
- Has a HH income of \$100,000 plus

*Source: NSGA, Sports Participation Study 2006*



## The Snow Sports Market—Women:



### “Cold” facts from SIA study

- **Women spend far more on base layers** as a group - 37% of all apparel accessory dollars from women went to base layers (vs. hats for general market).
- **Women’s fleece dollar sales increased 47%** and insulated parka sales have jumped by almost \$25mm since 04/05.

Knowing why would tell you how to sell more

*Source: SIA Women’s Intelligence Report, 2007*



## The Snow Sports Market—Women:



### Make up...

- **36.2%** of alpine skiers
- **27.2%** of snowboarders
- **49.3%** of cross country skiers

*Source: NSGA, 2006*

## The Snow Sports Market—Women



### Account for...

- **50% of all first-time snowboarders** (up 29% from 2001) and 50% of all ski and board lesson takers.
- **But only 15% stick with boarding**, lack of proper equipment is cited a key reason they don't come back.

*Source: National Ski Areas Assoc.*



## The Chief Purchasing Officer—Mom



**“Women are making the decisions, we have to let women know you care about them,”**

Chip Day, head of brand management at *Peek'n Peak*, said of the reasoning behind adding the women's center. **“Mom will determine where the family is going to go.”** (re: adding *Burton Learn To Ride* center to its planned \$8mm expansion)



## The Snow Sports Market—Women



*As compelling as the market is today, the future looks even better.*

### **Consider that...**

- In 1971 7% of H.S. girls played sports
- In 2001 50% of H.S. girls played one or more sports

**—an increase of 1,567%**

**And these girls are only going to give their business to retailers who get it.**

*Source: Girls, Inc.*



## The Snow Sports Market—Women



Where does their introduction  
to your store start?

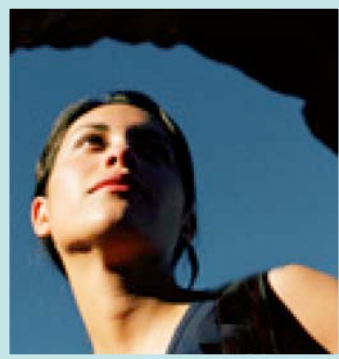
You got it:

**Mom**

*(But remember, she's not your mom)*



## Women: The Ideal Customer

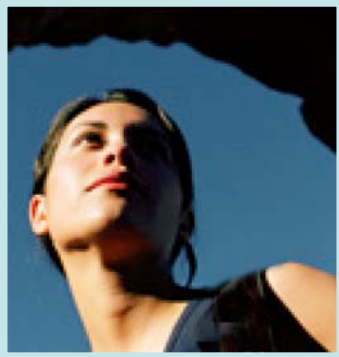


- **Are more profitable in the long term** due to loyalty and word-of-mouth—89% recommend brands they believe in to family and friends.
- **Bring more business from both genders**—meeting their higher standards increases sales overall.
  - *Home Depot*—wider aisles and coordinated displays increased sales from both genders.
  - *Wyndham by Request*—increased business from female travelers from 19%–35% and lifted business from men too.



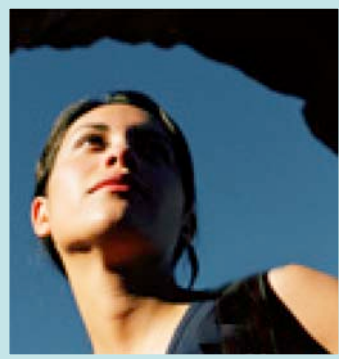


## In General, Women...



- **Tend to research more extensively** before making a purchase (33% research online before purchasing in store)
- **Are much more aware** (and annoyed) when marketing and customer experience don't sync up
- **Tell friends and family** when they've had a bad experience
- **Are more interested in the end result** or "life impact" of a product or service
- **Have higher standards/attention to detail** around the buying process
- **Do not respond well to fear messaging**
- **Appreciate and reward good service**

## Shopping: Gender Differences



### Men...

- **Want** to make *transactions*
- **See** brands in parts
- **Respond** to icons and “biggest”, “best” messaging
- **Jockey** for status
- **Will make decisions** alone
- **Avoid** asking for help

### Women...

- **Want** to make *connections*
- **View** brands holistically
- **Desire** community and shared values
- **Negotiate** connections
- **Value** insider info
- **Enjoy** the process of discovery



Let's Be Clear...

**A brand does not have to be women-only to  
be a great women's brand.**



And Even More Clear...

**Becoming a great women's brand does not  
have to mean scaring away all the guys.**



## Great Women's Brands Offer...



- Connection and community
- Authenticity
- Trust
- Shared values
- Substance
- Consistency
- Solutions vs. products
- Superior service
- R-E-S-P-E-C-T

## Great Women's Brands—Apple



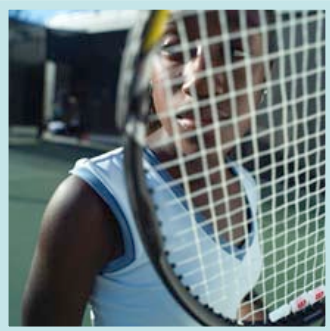
- **Made design/style** a core value.
- **Offered an intuitive interface** that makes both techies and newbies feel like creative geniuses.
- **Took something utilitarian and dry** (technology) and made it into a cool statement of personal expression (iMac/iPhone/iPod).
- **Brand is identified by emotion** vs. age or gender—turns out a lot of things that appeal to women (cool design, ease of use) appeal to everyone.

## Great Women's Brands—Target



- **Did it by making discount shopping cool.**
- **Stole** K-Mart shoppers, Wal-Mart shoppers and attracted those who wouldn't be caught dead in either.
- **Did it with style as a core value**—convinced top designers and consumers that great design could be done on the cheap.
- **Did it with an easy shopping experience**—you can always orient yourself in a Target and you always leave with much more than you intended.
- **Did it by creating a fun, irreverent, cohesive message.**

## Visible versus Transparent Marketing

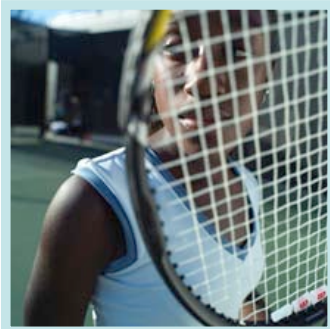


- **Visible—calls out “for women”**
  - Product or service has either been built from the ground up or adjusted in a fundamental way to address women’s needs OR is a unisex product dressed up in a feminine color palette.
- **Transparent—calls out features that appeal to women**
  - Product or service appeals to both sexes, but detail in marketing, service and design is enhanced—increases sales for both.





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airports within  0 Miles  Search by **New>**  Price & Schedule  Schedule  Price

Passengers:  1

Promotion Code  [My Dates are Flexible](#)

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### Gates & Times ? Schedules Flight Status Notification

From: [Lookup](#) To: [Lookup](#) Flight Number:

and/or

Date:  Today  Time:  Early Morning   Arrival  Departure [GO](#)

### View My Miles ? Buy Upgrades Email Subscriptions

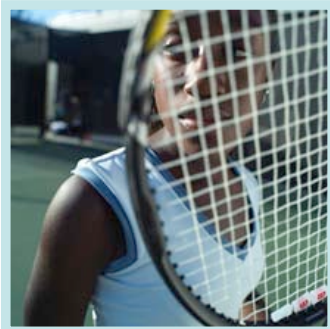
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# AA: Women Travelers Disconnected



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## Women Travelers Connected



**Nora Linville**  
Director,  
Women's Sales & Marketing


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Women Connected Through Business



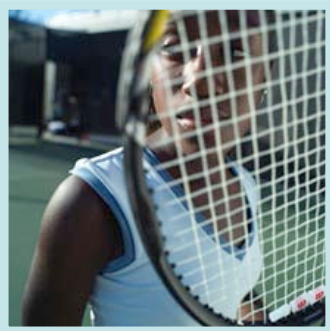
Women Connected Through Lifestyle



Women Connected Through Each Other



# AA: Women Travelers Disconnected



## GENDER- AMERICAN AIRLINES

**Ready To Book Your Flight?**

From: (City)

Departure Date: Jan 1

To: (City)

Return Date: Jan 1

**GET FARE**

*Woman Search*

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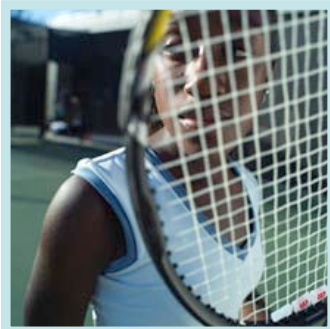
[Advanced Search](#)

Cabin, Seat, Telephone, Children, Country of Residence

**MAN SEARCH**



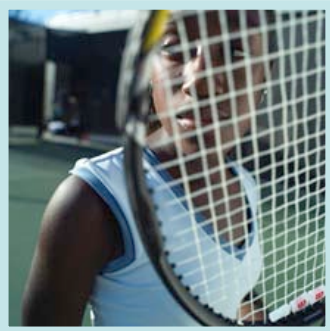
# Harley: Welcoming Women Into The Brand



The screenshot shows the Harley-Davidson website's 'Riders' section. At the top, there's a navigation bar with 'HARLEY-DAVIDSON USA' and links for 'SHOPPING CART', 'WISH LIST', 'RESERVATION CENTER', 'ONLINE PROFILE', 'CONTACT US', and 'FAQ'. Below this is a secondary navigation bar with categories: 'MOTORCYCLES', 'ACCESSORIES & APPAREL', 'EXPERIENCE', 'RIDERS' (highlighted), 'DEALERS', 'COMPANY', and 'DETOUR'. A left sidebar lists: 'GETTING STARTED', 'RIDER EDUCATION', 'SAFE RIDING', 'HARLEY OWNERS GROUP®', 'SALUTE TO VETERANS', and 'WOMEN & MOTORCYCLING'. The main content area features a large banner with four riders and the text 'BOUND BY THE PASSION TO RIDE.'. Below the banner are three main sections: 'GETTING STARTED' with a 'GET ON A HARLEY®' button, 'THE 2006 AMA INTERNATIONAL WOMEN & MOTORCYCLING CONFERENCE' with a 'Download your registration form' link, and 'HARLEY OWNERS GROUP®' with a tagline and logo. At the bottom, there are three smaller sections: 'OUR SALUTE TO VETERANS', 'WOMEN AND MOTORCYCLING', and another 'WOMEN AND MOTORCYCLING' section with a featured rider interview link.



## Harley: Welcoming Women Into The Brand



- **Added female rider section** to community area of website in 2003.
- **Hired sales training expert** to improve customer service.
- **Created women-only Garage Parties** to educate new riders.
- **Developed product to better meet smaller riders needs**—narrower seats, softer clutches, lower profile.
- **Sales to women are now at \$300,000,000**, not counting apparel, and account for 12% of sales overall—Harley VP says it's just the beginning.



## On The Retail Floor: The Disconnect



**71% of women  
surveyed**

between the ages of 21 and 31 wish  
retailers would offer a larger selection of  
sports apparel specifically for women.

*Source: Kurt Salmon Assoc., 2002*

## On The Retail Floor: The Disconnect



**= Too much square footage devoted to men**



*Typical store layout*

 Selling space devoted to men       Selling space devoted to women

Merchandising misses connecting with women

Very few saleswomen



## The Specialty Retailer Advantage



- **Frustrations with poor customer service** in retail is at an all time high (*Stores Magazine* survey in June '07 netted 7,000 verbatim responses).
- **Specialty retail has the opportunity**, via deep product knowledge and understanding of the local community, to deliver an experience that is personal, relevant and unique—the building blocks of consumer advocacy.
- **Flexibility to adjust quickly** (without sending a memo to corporate for approval).





## The Specialty Retailer/SSL Opportunity



- **Leverage female consumer knowledge**, local, regional and national, to drive manufacturer innovation.
- **Negotiate programs and promotions** that can be customized by individual stores.
- **Trade time with your female customers** in return for appealing giveaways.
- **Learn from each other's** successes, and missteps.



## 5 Things You Can Do To Get Started Now



- **Ask** Your Female Customers What They Want
- **Offer** A True Selection of Women's Product
- **Create** An Environment That Makes Women Welcome
- **Deliver** Superior Customer Service
- **Know** What You Stand For



## 5 Things You Can Do To Get Started Now



### **Ask your female customers what they want**

- Network on the mountain and in town.
- Collect names at checkout and online.
- Host small groups, in-store or after hours (1 hour session with food/drink/demos—we want to hear from you!).
- Conduct off-site mini events or clinics - get women out in the snow

*Topic areas could include: service, merchandise selection/quality, interest in classes or events, causes to support.*



## 5 Things You Can Do To Get Started Now



### Offer a True Selection of Women's Product

- **Devote** mind space and floor space to a robust women's product offering
- **Try out/promote** new women-specific brands
- **Merchandise** head-to-toe and inside-out outfits; complete ski and board set-ups for all levels
- **Tap into manufacturers:** Request product clinics and copies of research reports on women (*Salomon conducted a major study in '03*)



## 5 Things You Can Do To Get Started Now



### **Make Women Welcome**

- Clean, spacious dressing rooms!
- Imagery/posters that include female athletes
- Sizes in stock
- Kids product nearby
- A sense of community (steal a page from LuLuLemon)



## 5 Things You Can Do To Get Started Now



### Deliver Superior Customer Service

- Perceptive and courteous staff (and enough of them).
- Staff make-up that reflects your customer base—hire women in hard goods too!
- Website with contact info & directions prominent - blog on mountain conditions, hotel recommendations, local “specials.”
- Technical *and practical* expertise (knowledge of product lines and key benefits compared to each other and brands not in store).
- Fast resolution of problems that **always** gives the customer the benefit of the doubt.



## 5 Things You Can Do To Get Started Now



### **Know** What You Stand For

- Why do you exist? What makes your store experience different?
- Ask a couple of employees and three customers (both new and frequent) to determine what is getting across
- Involve your team in clarifying your message
- Tell it to everyone (Whole Foods literally paints their values on the store walls)
- Find the connection point with your female customers (The “freedom” message of Harley is compelling to both genders)



- **There is no magic bullet.**
- **This is a long-term strategy.**
- **You will make mistakes.**
- **You will have successes.**
- **Ultimately, it will pay off.**





Thank You



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