Midterm Audit

BA241A

August 15, 2010

Marketing Audit

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1. **Introduction** 
   1. **Thesis statement**

REI (Recreational Equipment Inc.) is the nation’s largest privately owned co-op in the sales of outdoor gear. Since its early stages, REI has continued to encourage the public to enjoy the great outdoors with high-quality outdoor equipment.

* **Mission Statement:**

"We inspire, educate and outfit for a lifetime of outdoor adventure and stewardship."

The purpose of this audit will be to first give you an introduction to REI and how it came to be what it is today. I will then discuss the general marketing mix of REI’s Product, Price, Place and Promotion and how REI is different and unique in each topic. Using an Environmental analysis I will evaluate topics such as how REI applies itself to the social environment with its interests in green technology and fund raising as well as their demographic. The audit will then look at REI and how it is ran as a business using the SWOT analysis to identify REI’s strengths, weaknesses, opportunities, and threats.

Using these tools will help give a little insight into how REI became a successful co-op outdoor gear retailer and what REI can improve to make itself a better retailer.

* 1. **Company information**

**2.2.1** **Background/history**

A Pacific Northwest mountaineer named Lloyd Anderson was on a mission to find a well-made, well-priced ice axe. With no luck in finding one locally, Lloyd came across an ice axe in an Austrian alpine gear catalog for just $3.50, shipping included. Word spread quickly through Seattle’s climbing community about Lloyd’s find which in 1938, led him to team up with 21 other climbers to create a climber’s co-op selling outdoor equipment now known as REI. (REI)

After initially operated out of Lloyd’s house REI opened its first store in 1944 comprised of three shelves in the back of a gas station in downtown Seattle. In 1953, REI hired its first employee named Jim Whittaker a man who a decade earlier was famed for becoming the first American man to climb the summit of Mt. Everest. As Lloyd’s successor, Whittaker proved to be an investment to REI bringing ideas of expiation and growth. Through the 80’s and 90’s to present day more and more stores opened with its first east coast store in 1987, to REI’s new flagship store in 1996 located in Seattle.( FundingUniverse)

**2.2.2 Mission & Vision**

REI’s mission is very clear within its mission statement “stewardship.” Stewardship is REI’s commitment to getting people outdoors and advocating a healthy living, and care for our planet and all of its inhabitance by making a positive difference. Stewardship is also the way REI runs its business and how to improve the environment, social and financial results without compromising their early cooperative mountaineering values. (REI)

REI’s vision is to stay true to nature and have fun doing it. Like in its (do not use personal pronoun to refer to a business) mission statement REI’s vision is to inspire, educate, and outfit our members and other customers, everyone from the beginner to the advanced outdoorsman.

Priorities:

*- Advocate the public of conservation of nature*

*- Inspire the use and responsibility of the outdoors*

*- Make the environment and community better through superior business practices*

*- Create possibilities for increased involvement in outdoor activities starting with the kids.*

*- Maintaining a company with happy employees that continue the mission of REI* (REI)

**2.2.3 Company details**

REI is made up of 80 stores in 27 states across America employing 8,000 people and has been recognized as one of Fortune Magazine’s “ 100 best companies to work for” in the US.(REI) REI is a publicly traded company but is a private cooperative with company wide sales reaching $1 billion in 2005. What does it mean to be a cooperative? (REI) With the headquarters located in Kent, Washington, REI is the largest consumer cooperative, with more than 3.8 million members. (Colbert) Along with sales, as a retailer REI has become more and more involved with charity. In 2005, REI donated $4 million and hasn’t stopped since.(Harris)

1. **Marketing Mix Analysis**

**3.1 Four P’s**

From its inception, REI has been involved in the art of finding the best product at the best price for the best person. As in Mr. Lloyd Anderson’s search for the best price and highest quality ice axe, the same value and mission is a part of REI and the way they run their business today.

As trends change and peoples quality of life improve so did the involvement of companies such as REI. Today people are more consciences of themselves and the world around them. REI is a strong advocate of positive change influencing and involving the communities with the products it provides and the environment it promotes.

**3.1.1 Product**

Although REI started their business selling only climbing gear, today in addition to climbing gear they sell a more diverse variety of product. The quality has stayed the same but with more options and categories for customers to browse. These days REI supplies almost everything outdoors such as camping, biking, snow gear and apparel even adventure trips to name a few.

REI carries a wide variety of quality brands from Garmin to Under Armour. In addition to selling quality brands such as Mountain Hardware and Thule, REI sells its own brand as well. REI gear and apparel is made for the true outdoor individual needs of men, women and children, REI gear and apparel is only available at REI, along with other top brands for camping, climbing, cycling, hiking, outdoor fitness, paddling, snow sports, and travel. (Feldman)

A unique feature of service available at REI is that they not only sell items they also rent equipment out to customers. Allowing customers to try out the product before they buy and getting them involved in more activities. (Feldman)

Another big service that makes REI standout from the rest of the outdoor gear retailers is REI Adventures. Since 1987, REI has offered small group tours worldwide avoiding the usual tourist traps and guiding customers through the outdoors. Every year, REI Adventures plans more than 90 domestic and international bicycling, trekking, kayaking, hiking, camping and mountaineering adventures. (REI)

**Comparison chart:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **REI** | **DICK’s** | **Sports**  **Authority** | **LL Bean** | **Big 5** |
| **Bikes** |  |  |  |  |  |
| **Camping** |  |  |  |  |  |
| **Trips** |  |  |  |  |  |
| **Shoes** |  |  |  |  |  |
| **Team**  **Sports** |  |  |  |  |  |
| **GPS** |  |  |  |  |  |
| **Hiking** |  |  |  |  |  |
| **Rock**  **Climbing** |  |  |  |  |  |
| **Fishing** |  |  |  |  |  |
| **Water**  **sports** |  |  |  |  |  |
| **Pet gear** |  |  |  |  |  |
| **Winter Sports** |  |  |  |  |  |
| **Clothing** |  |  |  |  |  |
| **Golf** |  |  |  |  |  |

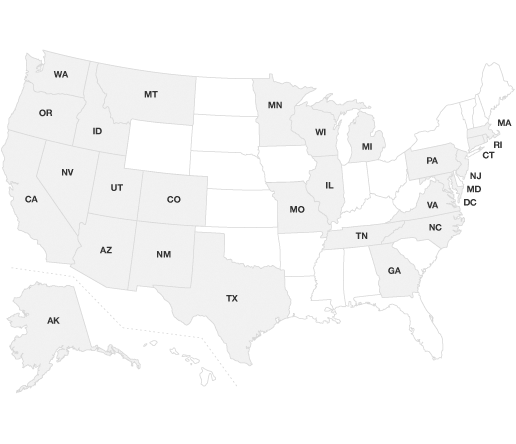
**Available: Not Available:**

**3.1.2 Price**

A pricing strategy practiced by REI has to do with the quality they have in their product. A premium pricing strategy is used because REI is selling a quality product: they want the price to show how prestigious, and unique they are. However, REI is still considered a small fish in a big pond and with that, REI will still compete against the big chain stores in price. A competitor- based pricing strategy will help REI to “hook” a new customer that will notice the quality of their marked down products and will return regardless of price.

**3.1.3 Place**

REI isa community driven retailer committed to providing quality outdoor gear to anyone that needs it. REI will locate their stores in geographical locations where their product would be most useful. Location to location some of the items available will change to relate to the local environment, like water gear for locations near water and more camping/ hiking gear near trail camp locations.

Although locating stores near recreational areas throughout the United States, REI has a very strong online presence. Its website allows all outdoor enthusiasts a way to obtain their quality product no matter the distance. Another strength that REI’s website has is their knowledge base, allowing customers to research how-to’s in which motivates people to go outdoors and quite possibly require an item from REI.

**States having REI locations shaded (REI)**

**3.1.4 Promotion**

Other than the usual newspaper ads with advertisements and sales, REI promotes in a variety of ways.On November 30, 2009, REI launched their first TV commercial in order to inspire viewers to utilize the great outdoors with their quality products (Martinez). (The period is placed after the parenthesis) Although late to the TV advertisement scene, REI has been committed to increasing the environment of the community around it, with fundraisers and community help programs, in turn helping promote REI.

REI has never been one to brag about its charitable donations, but with other competitors displaying their public donations, its members were asking why REI was not doing more. REI was in fact doing more; they were doing more than its competitors were, so REI thought it was their duty to inform the public of its charitable doings. A benefit to displaying their charitable work is becoming known for their giving back to the community, promoting customers to shop at a positive environment. (Tornek) What types of philanthropic activities are they involved in? Do they directly relate to the outdoor industry, fitness, or maybe the environment?

1. **Environmental Analysis**

**4.1** Social environment

A continuing trend among consumers today is the ideal of having a healthy and fit living. REI is a strong advocate of the use of the outdoors as a personal fitness tool in order to say healthy and fit. There are 49.7 million American adults who are considered fit consumers, and households of consumers who are fit are more affluent. Fit Americans are more concerned about what they do with their time rather than money. With that in mind, the affluent fit American will be more concerned with the quality and use of a product, which is REI strength. Another aspect of the fit person of today is that they are more interested with the environment and how to preserve it. This fact fits perfect with the mission and vision of REI because REI is a true advocate of preserving the outdoors and having fun in it. (Brown)

Speaking of preserving the outdoors another environment that concerns REI greatly is the one of green technology. Since 1996, REI has been pioneering the green design and in 2004 REI Portland, OR, became the first retail store in the country to earn the U.S. Green Building Council's LEED gold rating for commercial interiors. (Bove) Environmental stewardship is part of the DNA of REI. Architecture and design manager Laura Rose provided an in-depth look at REI's sustainable initiatives and philosophies.

*"Our goal is to tread rightly on this earth as we open stores and go about doing our business," Rose explained. "As a brand, we have always had an important connection with the environment."*(Field)

Green building puts an emphasize on water conservation, energy efficiency and indoor air quality. When executed correctly, green building can provide a more comfortable and healthy environment both inside and out. Through REI’s prototype program, REI has started its first prototype building in Boulder, Colorado with the plan to identify more information to further advance their green building technology. (REI)

Along with REI’s green building technology, a more direct form of environmental conservation is in REI’s ecoSensitive Gear and Apparel. In 2007, REI implemented the ecoSensitive label to inform consumers of which products have been made from recycled, rapidly renewable and/or organic fibers. (REI) Implementing this “cradle to cradle” design method, which is designing with the future continued use of a material, reduces waste in landfills and preserves the environment. (GAM) Garments in the ecoSensitive category are made of such materials as bamboo, organic cotton, hemp, post-industrial recycled polyester, recycled polyethylene terephthalate (PET) plastic, polylactic acid (PLA), or organic wool. REI has teamed up with 40 other stakeholders from the Outdoor Industry Associations’ to create a common way to measure, report and improve the environmental impact of outdoor gear and apparel. (McLaren)

**4.2** Demographic environment

The demographic of REI is anyone that has an interest in the great outdoors. That puts its range anyone between youth to ageing baby boomers and anyone in between. The fit consumer of today is young, about 23% are 18-29 years old and are in the view of REI. The big trend for the youth/young adult demographic are the active sports such as snowboarding, skateboarding, and inline skating. Fit consumers like these are more willing to par tack in more dangerous activities, in which REI can provide a quality safe product to support these activities. (Brown)

Americans are enjoying healthier and longer lives than ever before, coupled with new technologies and a positive outlook, our aging members of society are very active. (Marigny) For baby boomers and older, REI has them in mind within the products they provide and the technology they put into them. Sally Jewell, CEO of REI spoke on the subject of aging baby boomers and how REI is dealing with change:

“*There's a trend toward ultralight -- you can come in for a very affordable price and get a pack, tent and sleeping bag you can take on an overnight or two-night backpacking trip that weighs under 10 pounds.*

*We're selling a lot of carbon fiber trekking poles. And we're stepping up light-impact adventure travel trips, like paddling.”* (RICHMAN)

With 18.1 million active seniors in the United States, according to the

U.S. Census Bureau, they declare that number to grow to 26 million by 2015. The technologies provided at REI reflects well for this foreseen growth in aging consumers, these technologies will allow consumers to continue to stay fit far into the future and for the future aging consumers still to come. This is a unique perspective and challenging demographic for this organization to go after, but I can see the potential market is a great one.

Another trend that concerns REI greatly is the one of getting all people large, small and all shapes and sizes to get fit. Although the REI consumer is foreseen as a fit individual there are those consumers out there wanting to beat the trend toward obesity. When Sally, CEO of REI was asked about this continued trend toward lack of exercising obesity she said:

*“We're trying to get a lot better at fitting all shapes and sizes. It's a huge challenge. When you bring in extended sizing, you have to either narrow your styles or throw something else out, because the store is finite in size. We have a lot more available online than we can fit into any store.”* (RICHMAN) she explained that well.

REI’s obvious concern with the well being of all its customers no matter who they are, only supports REI and how they don’t discriminate toward any environmental demographic.

1. **SWOT Analysis** 
   1. **SWOT Matrix** (on following pages)

|  |  |  |
| --- | --- | --- |
| **Internal:** | Strengths  * Charitable. * Health Promoting. * Use of Green technology. * Very useful website. * Offers classes to customers ( i.e. rock-climbing, First-aid). * Customer service. * profitable. * Not age discriminate. * Not size or shape discriminate( i.e. XXXL, Plus size). * Expert advice online. (how-to’s) * Strong employee satisfaction. * Community connection. (supports local community) * Strong Brands. * Encourage members with rewards. * Rental offered * Trip activities. (world tours) * 100% satisfaction guaranteed | Weaknesses  * Cost rise. (Green Tech.) * Layoffs due to cost of green tech. * Co-op owner trust. * No big corporate backing. (they’re private co-op) * Do not offer team sports equipment. |

|  |  |  |
| --- | --- | --- |
| **External:** | **Opportunities**   * Expand into automotive supply (interesting?). * Expand into popular team sports. ( i.e. Baseball, Basketball, Football) * Customer incentives for GPS proof of hikes or activities traveled) * Offer more health food snacks. * Business too Business sales. (i.e. other company parties, trips/ activities) great idea! * Ability to search online local stores inventory. * Co-op with an even more specialized retailer. (i.e. bike shop, snowboard shop) | **Threats**   * Corporate competition. (Bigger chain retailers) * Corporate buy out. * If public found out possible news of green products not really green. * Entertainment devices. ( TV, gaming consoles, movies) * Small specialized shops sell very specific items. ( bikes only, kayaks only) * Recalls |

* 1. **SWOT discussions** 
     1. **Strengths**

The strength of REI stem from REI’s basic view of quality of life and quality of product. In REI’s mission statement, they speak of inspiring, educating and outfitting the consumer, which is a key strength of REI.

REI’s connection with the community is one of the main reasons REI is continuing to be successful in sales. With garments made of Eco-Sensitive materials and Awards for green building shows REI cares about the lives of the people around them. Along with its green efforts, REI is helping the community with programs such as youth programs that get the kids involved with the outdoors and other programs like volunteer projects with community service. (Tornek)

Strong brands along with their personal REI brand are a positive attribute of REI’s strength. From the beginning, REI has been focused on obtaining and offering a quality product and service. Novara, REI’s bicycle brand has become a highly sought after product for bike retailers to stock around the US. (Sani)

From the care put into the environment and community around it, a brand that runs strong, REI also guarantees there product 100% only adding to the already strong REI. (REI)

* + 1. **Weaknesses**

An unfortunate side effect of having a quality product and a product with green technology is the rise in cost. With a rise in cost might spell layoffs for some employees. Within a new product such as a new green product may cost more because the process of making it may be very new in which cost more.

Honesty and loyalty is a mainstay for any coop business that wants to say strong. A business owned by its members, stakeholders, and employees needs to be open about the disclosure of information about products and services, the way they are organized and presented, and the operations and governance of the business. (Webb)

Another internal weakness of REI is the lack of any corporate backing and safety. A customer’s view of a business with a large corporate backing is like a safety net. If something goes wrong or is not satisfied with the product the large corporation is viewed as having more power and money to fix the problem. Along with this consumer, perception of big chain stores there is REI’s lack of team sports. REI’s competitors like Sports Authority, Big 5, and Dick’s Sports all carry most of the team sports plus most of the items popular at REI. So overall, a consumer might be more willing to shop at the big chain stores due to trust, backed power and variety of product.

* + 1. **Opportunities**

In any business, you will be able to identify some opportunities that the particular company could invest in, but some of the reasons not chosen may have to do with money. REI has chosen to stay with the categories it sales like climbing, camping, biking and skiing among others due to its target consumer.

An opportunity that REI could look in to is the one of expansion into other categories not currently available at REI. One such direction would be the category of team sports like baseball, basketball and football to name a few. Most of REI’s competitors have gone in that direction but may have done this because they are less specific in their target consumer. Other expansion ideas may include automotive products, hunting items but some might not fit into REI’s mission.

An interesting opportunity that REI could research in would be a fitness incentive. An incentive that is good for both the consumer and REI in the way of value. If REI offered an incentive that with the use of a GPS or phone records and tracks your treks into the outdoors and the consumer brings it in to the store, will be rewarded for their physical activeness. This incentive promotes fitness with rewards in which brings the customer back to REI in hopes to shop more. This opportunity fits perfect into REI’s mission and would be an excellent venture to take.

A final opportunity that may interest REI would be one relating to business relationship. A business like REI would greatly benefit from a business-to-business sales plan. REI could start offering special company party programs or adventure trips, like their already in place REI Adventures. REI could provide services to entertain businesses with parties with the rock wall or other activity promoting health and team structure.

REI could also entertain the thought of teaming or “co-op” with other retailers that are even more specialized then themselves. Even though REI is already pretty specialized, they could also team up with a small business specializing in categories such as kayaking, scuba or fishing. Instead of choosing to do, team sports sales, as mentioned earlier REI could co-op with a specialty team sports business.

**5.2.4 Threats**

External threats to REI might have a lot to do with it being a co-op, privately owned business. Being a co-op already offers a challenge because a large corporation with lots of money is not backing it. If REI cannot keep up with big chain stores threatens the livelihood of REI - fragment. Along with that, REI could be bought out by one of those big chain stores becoming just another part of the chain.

The mission of REI’s promotion of a healthy living could be threatened by its polar opposite laziness. Entertainment providing devices such as gaming consoles, TV and movies could potentially threaten to keep people from the outdoors. As technology in entertainment gets higher and higher the more cause will be to be tempted to stay indoors, the anti- REI mantra.

With their quality of life promotion and community involvement REI is handling these threats with grace and presents. This is what is making them the largest co-ops in the nation, with no signs of stopping.

1. **Conclusion**

From their humble beginnings as a 21-person co-op, REI has been an innovator in all of their endeavors. To be a small fish in a big pond and able to stand their ground speaks for its self. The strategies and techniques that REI has implemented have made its business stay afloat in this raging ocean of sports activity retail competition. The connection to the community, with their youth programs and community service is a big part of the success of REI. The green technology and green building is shedding a positive light upon REI, inspiring people to shop at their store.

Although REI has been known for having high-specialized prices, it’s what is behind the product that matters. When Lloyd Anderson the innovator and founder of REI went on his search for that quality ice axe, the side effect was a quality environment for all participants of the great outdoors to be inspired, educated and outfitted for a lifetime of outdoor adventure and stewardship. (REI)

Well done. Can’t wait to see what your group puts together.

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**Criteria for Business Course Papers:**

**Minimum expectations for papers in this course are highlighted in the rubric in bold.**

* **Style**
  + Follow MLA format using proper page headers, margins, in-text citations, citation page etc.
* **Writing style and grammar**
  + **Papers with excessive grammatical errors will be given a 0!**
* **Plagiarism**
  + **Plagiarized papers will receive a 0 and may not be resubmitted for improved grade; however, you may be required to rewrite the paper to meet course requirements.**
  + A few forms of plagiarism:
    - Copying sources – even one sentence, without using appropriate means of identifying origins – see MLA style guide
    - Using someone else’s ideas without citing the source.
    - Using your own work from another class without permission.
* **Sources**
  + You are required to use authoritative sources in your papers in addition to the textbook –
    - General rule of thumb: One - two sources per page (i.e. 3 page paper should have 3-6 citations)
    - See individual assignments for requirements
  + Use authoritative sources from professional journals, scholarly journals, etc. Do not use sources such as Wikipedia, Dictionary.com, or biased sites. (Be critical)
* **Resubmitting Papers & Late papers**
  + See individual syllabus for policies on late papers and resubmitted papers

|  |  |  |  |
| --- | --- | --- | --- |
| **Grading Rubric** | | | |
| Category | Criteria | Ratings | Score |
| **Assignment Criteria**   * Page/word requirement * Research requirement * Submission requirement * Formatting requirement * Other as indicated on assignment | Exceeds assignment criteria | 19-20 | 20 |
| **Meets all requirements of assignment** | **17** |
| Meets most requirements | 13-16 |
| Meets some requirements | 7-12 |
| Meets few requirements | 0-6 |
| **Content**   * Presentation * Persuasion * Explored various perspectives * Included supporting details * Thorough coverage of topic | All topics are addressed thoroughly with supporting details. Enough facts are gathered to present ideas persuasively. No usage of terms such as “I feel, I believe or I think.” Additional research was done with new related topics exposed and/or explored. | 17-20 | 20 |
| **All topics are thoroughly addressed with supporting details. Enough facts are gathered to present ideas persuasively. No usage of terms such as “I feel, I believe or I think.” Critical reflection and construction of new insight is evident** | **13-16** |
| Most topics are addressed with supporting details | 6-12 |
| Topics not addressed fully. Content is primarily a summary of the textbook | 0-6 |
| **Writing Style and Grammar**   * Grammar * Spelling * Sentence structure * Readability * Paragraph flow * Creativity | Compelling and creative writing style. No grammatical errors  Sentence structure is varied and rhythmic | 18-20 | 16 |
| **Very few grammatical or spelling errors.**  **Sentence structure complete and non-cumbersome**  **Highly readable** | **14-17** |
| Readable  Some grammatical/spelling or sentence structure errors | 8-13 |
| Many errors  Difficult to read | 0-7 |
| **MLA Format**   * Headings * Page margins * Page numbering * Line spacing * Typeface * Number usage * In-text citation use | Followed MLA style with no errors | 10 | 10 |
| **Followed MLA style with minimal errors** | **7-9** |
| Followed MLA style with some obvious errors | 4-6 |
| Little or no effort made at MLA compliance | 0-3 |
| **Sources**   * Citation page * Content of citations * Format of citations * In-text citations * Reliability * Quantity of citations | Researched additional sources to find valid alternate opinions and/or appropriate examples | 9-10 | 10 |
| **Used an appropriate number of sources. All sources are reliable. Citation page and in-text citations are correctly formatted** | **7-8** |
| Too few sources or sources were not reliable; however,  citations were correctly formatted | 4-6 |
| Too few sources or citations incorrectly formatted | 2-3 |
| No sources, no attempt at compliance | 0-1 |
| **Organization of Content**   * Introduction/thesis statement * Transitions * Logical flow * Appropriate paragraph breaks * Conclusion | Paper includes a strong thesis statement, a variety of thoughtful transitions, arguments presented in a logical sequence and position is restated in the closing paragraph | 10 | 10 |
| **Introduction outlines main points of paper, sequence is logical and conclusion summarizes paper** | **7-9** |
| Sequence is logical but either the introduction or conclusion is weak or missing | 3-6 |
| Paper consists of random pieces of information that is not connected. It is difficult to follow any logical thought process | 0-2 |
| **Business Style Writing**   * Established Hierarchy * Headings * Subheadings * Active voice * Eliminates unnecessary words * Avoids long cumbersome sentences | Has a well established hierarchy, succinct writing style that is clear, non-cumbersome and predominantly in active voice | 9-10 | 10 |
| **Subheads used on papers longer than one page. Most unnecessary words were eliminated. No awkward sentences. Bullet points used wherever appropriate** | **6-8** |
| No subheads used or paper uses too many meaningless words | 3-7 |
| None of the business style writing guidelines followed making paper difficult to read | 0-2 |
| **Late**: See syllabus for policy |  |  | 0 |
| **Total** |  |  | 96 |