

# The Self-Confirmation Study.

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*Why Arc'teryx customers don't buy to express who they are, but to confirm who they already are.  
And what that means for North America growth.*

Aarianna Goswamy · Portfolio Work · April 2026

## The Argument

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**Business problem:** *Arc'teryx must roughly double North American revenue by 2030. Only 4% of US outdoor fashion owners buy the brand, but almost all of them buy again. The issue thus is how to reach through to the customer on terms they understand, and not one of loyalty or of affinity for the brand.*

**Insight:** *Based on firsthand observation as a Guest Service Representative at Arc'teryx, this study argues that customers, especially women, use the brand not for self-expression but for self-confirmation: to affirm the standard they already hold themselves to.*

**Recommendation:** *Position Arc'teryx as the brand for people who hold themselves to a standard. A standard that hold even when no one is watching. Because it is for them- a personal standard. Pursue this positioning most urgently through the women's category, which is an identified area of growth for the company.*

## 01. The Strategic Context

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### Have Scale. Establishing Depth.

Arc'teryx surpassed \$2 billion in revenue in 2024, driving 36% growth in Amer Sports' Technical Apparel segment. [\[1\]\[2\]](#) Between 2020 and 2024, it completed a dramatic shift from 80% wholesale to 80% direct-to-consumer. [\[3\]](#) CEO Stuart Haselden has set a revenue target of \$5 billion by 2030 at the September 2025 Investor Day. [\[3\]\[4\]](#)

<b>4%</b> US Market Ownership (within surveyed US outdoor fashion consumers)	<b>100%</b> Implied Owner Repurchase Rate	<b>24%</b> US Brand Awareness
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Sources: [\[1\]](#) Revenue [\[7\]](#) Awareness & Loyalty

Management has explicitly stated that North America and China should be “about the same size by 2030, close to \$2 billion each”. This implies roughly doubling North American revenue. [\[3\]\[4\]](#)

“Arc’teryx is special. We do not see a direct competitor for Arc’teryx in how we’re positioned. We span three distinct market segments. We are the pinnacle of the outdoor market.” - Stuart Haselden, CEO, (September 2025)

## 02. The North American Market

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The global premium outdoor apparel market is forecast to be \$15.2 by 2035, with North America accounting for approximately 41% currently. [\[9\]](#) The broader outdoor apparel market exceeded \$17.47 billion in 2024 and is projected to reach \$29.85 billion by 2034. [\[10\]](#)

### The Arc’teryx Paradox

Only 24% of US outdoor fashion owners recognise Arc’teryx. Of those, only 17% own it, putting brand share at 4%. Yet *all* surveyed owners say they are likely to purchase again. [\[7\]](#) No other major brand in this category achieves that combination of: *narrow reach, perfect retention*.

WWD has described Arc’teryx’s North American customer base as spanning NYU students, Wall Street executives, and corporate lawyers. These disparate social groups united by the brand’s cultural resonance made it a “status symbol”. [\[11\]](#) Errolson Hugh of ACRONYM called Arc’teryx products “the Hermès bags of men’s performance wear” (a quote from O32c magazine in 2011. [\[14\]](#))

This breadth of customer profile is an asset, but may leave room for some ambiguity. Arc’teryx means different things to different people in North America. *The self-confirmation insight off this study seeks to resolve that into a single coherent psychological proposition.*

## 03. The Firsthand Observation

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*This section draws on experience handling inbound customer calls at Arc'teryx. These include orders, returns, sizing, and product questions. These are real conversations, and not surveys or focus groups.*

*A note on sources and privacy: The observations in this study are drawn from firsthand experience. No proprietary, confidential, or internal company data has been used. No customer names, account details, or identifying information appear in this document. Specific call details have been generalised to protect customer privacy while preserving the accuracy of the behavioural patterns described. The study represents my own analysis and conclusions and does not reflect the views of Arc'teryx or Amer Sports.*

### What Customers Were Really Talking About

Across hundreds of calls, customers were rarely calling to discuss technical specifications or elite athletic performance. They were talking about their lives.

One caller was not worried about a delayed shipment at all. She kept explaining that the jacket was supposed to arrive before a ski trip she had been planning for two years. The tracking number was almost beside the point. The gear mattered because the trip mattered.

Another customer spent close to ten minutes asking about sleeve length across three different sizes. Eventually he mentioned he was leaving for his first solo alpine trip in the Rockies the following week. He did not want to get it wrong. Not wrong in the sense of a return, but wrong in the sense of not being right for what he was about to do even if he was doing it solo.

*The product was rarely the subject of the call. **The life event was.** And the standard the customer held themselves to was the reason the call mattered at all.*

### A Specific Pattern in Female Customers

Over time, a distinct behavioural pattern emerged in calls from female customers. A pattern that sharpened the self-confirmation insight considerably.

Male customers tended to ask:	Female customers tended to ask:
<i>"How waterproof is the Beta AR?"</i>	<i>"If I wear this with a midlayer and a pack, will it restrict movement?"</i>
<i>"Is the Atom warmer than the Proton?"</i>	<i>"Will this work if I'm hiking with poles all day?"</i>
<i>"I need something for skiing."</i>	<i>"Does the hood sit properly with a helmet?"</i>
<i>Focus: the object</i>	<i>Focus: the system- the way it works for the activity in mind.</i>

Male customers tended to lead with the activity and evaluate the product against it. Female customers tended to lead with the product question, and the activity emerged later in the conversation. Almost as if it were the afterthought.

Female customers asked markedly more precise fit questions. Not only about style, but about function during movement:

- "When I reach overhead, will the jacket ride up?"
- "Does the hip coverage work with a pack hip belt?"

These are not beyond shopping questions. They are almost pre-departure checks. The customer is not deciding whether to go or what to wear. She is making sure her system is sound before she leaves.

*Female Arc'teryx customers are not buying gear to confirm who they are. They are verifying equipment because they are already in execution mode.*

## 04. The Consumer Psychology Insight

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*Arc'teryx customers are not buying gear to signal who they want to be. They are buying gear to confirm the standard they already hold themselves to. The stronger psychological driver is less performative, more self-confirming.*

Psychologists distinguish between *symbolic consumption* (buying to project identity outward) and *identity-congruent consumption* (people choosing products that align with an already-internalised self-concept). Most premium lifestyle brands tend to operate in the symbolic register. Arc'teryx customers are doing something meaningfully different: confirming to themselves that they are who they think they are.

### **The Female Inflection: Action Orientation**

*State-oriented* and *action-oriented* decision-making are two key concepts studied in psychology. State-oriented individuals deliberate, evaluate, and weigh options. Action-oriented individuals are already in motion; they need the tools to execute correctly, not reasons to act.

The female customer behaviour strongly resembled what psychology describes as *action-oriented* decision-making. The backcountry trip is planned. The commitment is made. The call is a systems check. It is methodical, focused, specific to the task ahead. This is not anxiety, but *precision*.

## 05. The Competitive Landscape

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In a market spanning The North Face to Moncler, every major brand has staked a psychological territory. [\[8\]\[9\]\[10\]](#)

Brand	Positioning	Psychological Register
The North Face	Premium accessible	Aspiration: Come as you are, go anywhere
Patagonia	Values-driven	Alignment: Buy less, buy right
Moncler	Luxury display	Status: The jacket as social object
Mammut	Technical specialist	Credibility: For the core mountaineer
Arc'teryx (Suggested)	Mountain luxury	Self-confirmation: The standard you hold yourself to

Arc'teryx currently communicates technical excellence and elite performance. That is directionally brilliant. But the emotional meaning customers attach to the gear (personal standards, milestones, quiet competence etc as I observed) remains largely implicit. The brand projects an ideal. The customers though are living a standard.

No outdoor brand owns the self-confirmation territory explicitly and coherently. No competitor is explicitly speaking to the customer who is not performing for others.

## 06. The Proffered Brand's Story and the Gap

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Arc'teryx launched No Wasted Days, its first global campaign, in October 2023 [\[12\]](#) The campaign told stories from the top down: eleven curated athletes and explorers, produced in-house, showcased in feature films.

Arc'teryx SVP of Brand Marketing Karl Aaker said in late 2025: "When things are hard or uncertain, people don't just look to brands for the products that they're selling; they look for authenticity, community, and connection." [13]

*Arc'teryx is telling great brand stories. The suggestion here is to tell its customers' story. The story of why someone who could buy anything chooses to hold themselves to this standard.*

The self-confirmation insight seeks to extend the No Wasted Days. By examining the psychological aspects, the insight contained in this study explains why the campaign resonates deeply with a customer who is already operating at their own standard.

## 07. Strategic Recommendation

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### The Broad Positioning

Arc'teryx should own the idea that it is the brand for people who do not perform for others. A brand for those who *hold themselves to a standard because they require it, not because anyone is watching.*

### Where the Opportunity Is Most Acute: Women's

Arc'teryx has publicly targeted growing women's from approximately 25% to 30% of total sales by 2030. [3][4] The female customer I observed on the phone is already in execution mode before she calls. *The brand's job is not to invite her in. It is to meet her where she already is.*

*The female Arc'teryx customer is not aspiring, but executing. The campaign should reflect that.*

### The Business Case

Arc'teryx has targeted 200 stores across North America as part of its expansion plan. [6] Retail expansion without brand clarity in a crowded market is expensive. A sharpened psychological proposition like self-confirmation (not self-expression) gives every new store opening a coherent story, and gives the brand a basis for growing beyond its current 4% market ownership [7] without sacrificing the intensity of loyalty that makes it exceptional.

## 08. Why This Study Exists

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This study was built from a vantage point of the inbound customer service queue of one of the most culturally significant technical apparel brands in the world.

Not focus groups. Not surveys. This is real customers, mid-purchase or post-purchase, talking about their lives in the same breath as their orders. Most brands try to discover their customers through research. I had the chance to hear them in real time.

The business case is grounded in verified public financial data. [\[1\]\[2\]\[3\]\[4\]\[5\]\[6\]](#) The strategic recommendation extends the brand's existing direction. *And the psychology underpinning it comes from academic training that made it possible to name what I was hearing.*

## Sources

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*All sources verified April 2026. Click any citation number in the text to jump to the relevant source.*

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**[7]** *Statista Arc'teryx Brand KPI Survey, US Outdoor Fashion Owners 2024:* <https://www.statista.com/forecasts/1351924/arc-teryx-outdoor-fashion-brand-profile-in-the-united-states>  
[24% awareness; 4% ownership; 100% loyalty]

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[The North Face 83%; competitor benchmarks]

**[9]** *Global Market Insights Premium Outdoor Apparel Market 2024:* <https://www.gminsights.com/industry-analysis/premium-outdoor-apparel-market> [15.B global premium market by 2034; 41% North America]

**[10]** *Global Market Insights Outdoor Apparel Market Size 2024:* <https://www.gminsights.com/industry-analysis/outdoor-apparel-market> [\$17.47B total market; 5.5% CAGR to 2034]

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**[12]** *The Drum Arc'teryx Debuts First Global Campaign No Wasted Days:* <https://www.thedrum.com/news/2023/10/05/arc-teryx-debuts-first-campaign-no-wasted-days-inspire-global-wanderlust> [Campaign launch October 2023]

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