



Microsoft Advertising Insights

# 2021 Sports, Fitness, & Outdoor trends

Microsoft Advertising. Intelligent Connections.



# Focus Areas



Camping & Outdoor  
Recreation



Cycling



Fishing



Fitness Apparel



Fitness Equipment



Golf



Hunting & Shooting

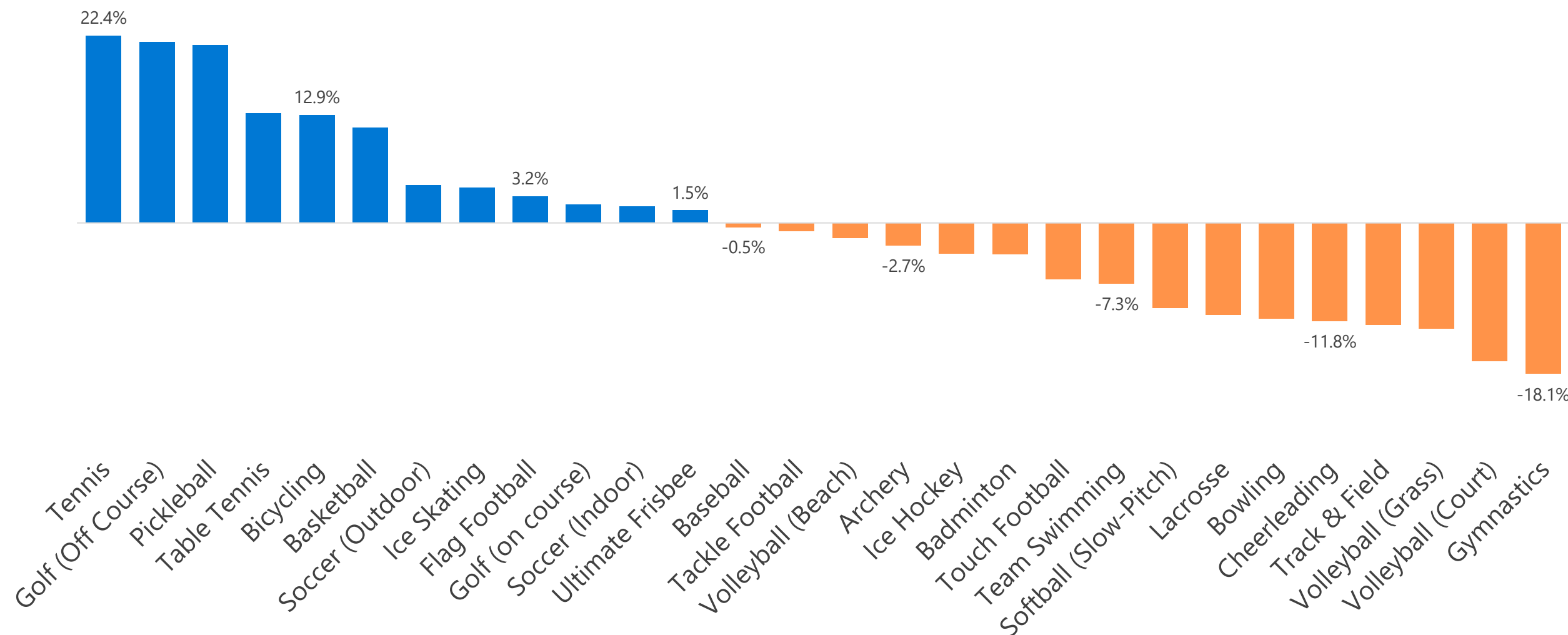


Running & Walking



Team Sports

# Percent change in total participation by sport



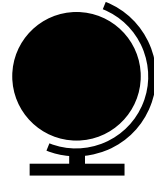


# Outdoor Industry Association's new participant study

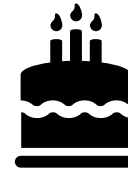
**2020** new participants vs. **2019** existing participants



More likely to be female,  
**58%** v. **49%**



Slightly more ethnically diverse,  
**66%** v. **71%** white



Younger,  
average age is  
**45** v. **54**



More likely to live in urban areas,  
**36%** v. **29%**



Camping & Outdoor Recreation searches grew 35% year over year (YoY)

**+28%**

Camping participation grew  
in 2020 vs. 2019

**7.9M**

New camping participants  
in 2020

**+16%**

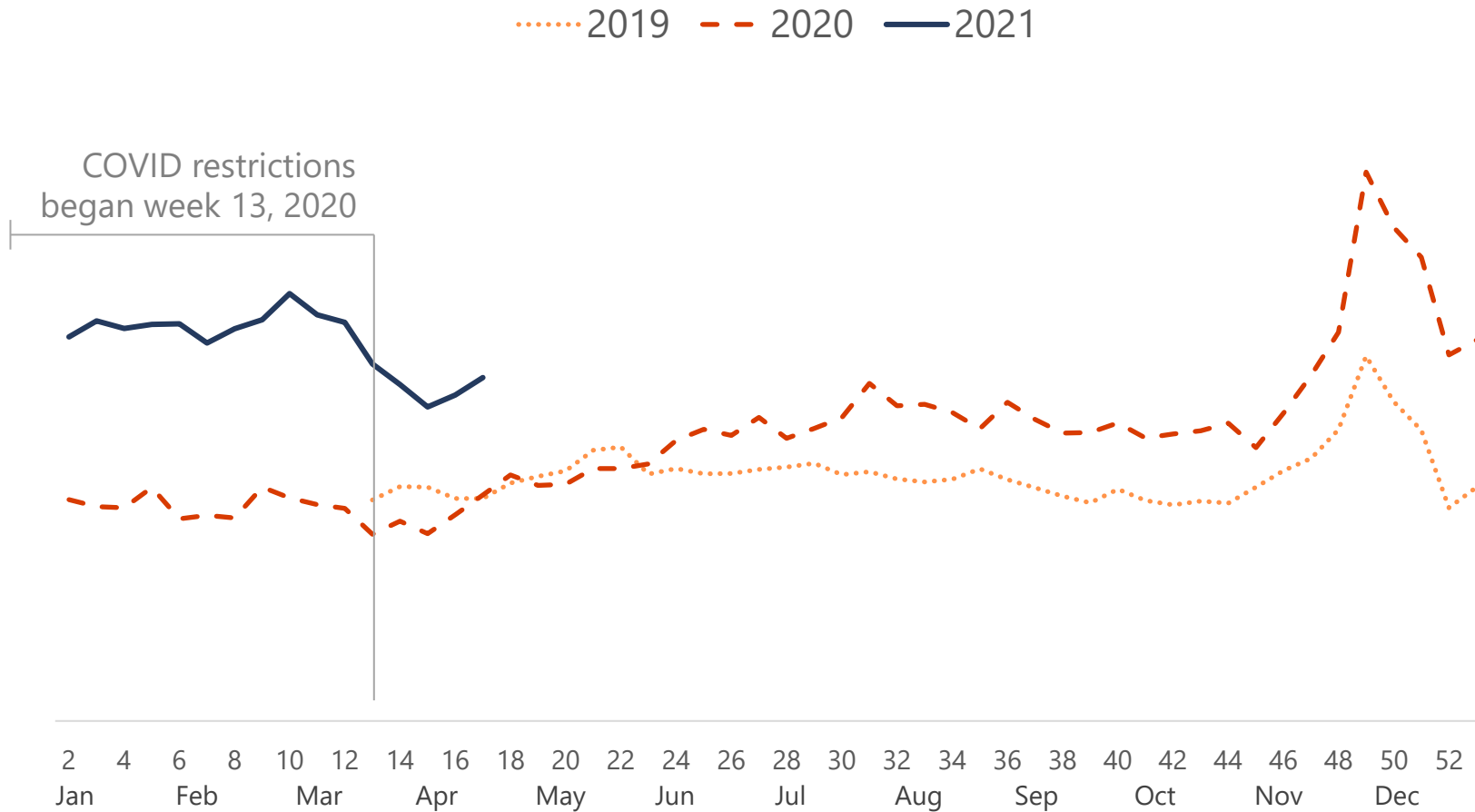
Hiking participation grew in  
2020 vs. 2019

**8.1M**

New hiking participants  
in 2020

# Camping & Outdoor Recreation clicks grew 22% YoY

Trended clicks by week



**+48%**  
2021 clicks vs.  
2019 baseline

**-9%**  
2021 cost-per-  
click (CPCs) vs.  
2019 baseline

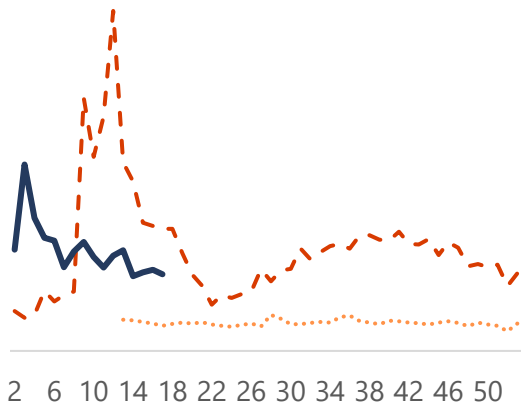
# Camping & Outdoor Recreation sub category growth

Trended clicks by week



Backcountry & Camping  
Food

..... 2019    - - - 2020    — 2021



**+188%**

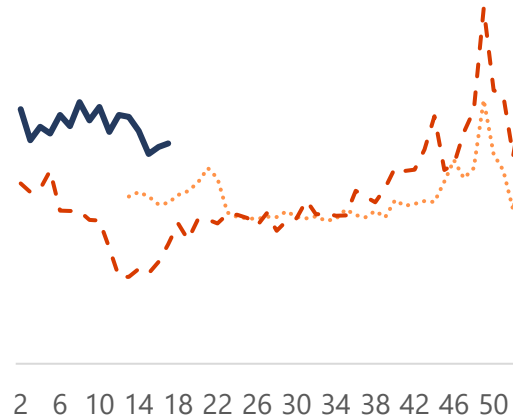
2021 clicks v. 2019

**+64%**

2021 CPC v. 2019

Hiking

..... 2019    - - - 2020    — 2021



**+36%**

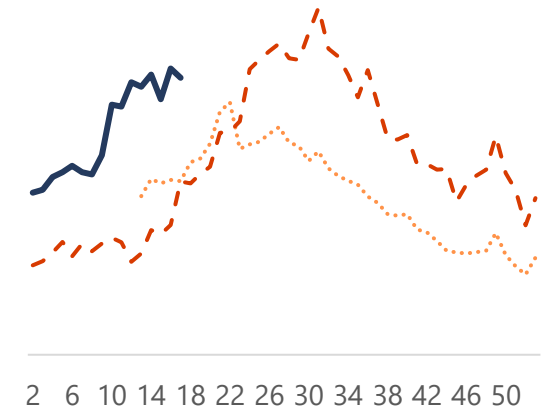
2021 clicks v. 2019

**+4%**

2021 CPC v. 2019

Outdoor Sleeping Gear

..... 2019    - - - 2020    — 2021



**+127%**

2021 clicks v. 2019

**-33%**

2021 CPC v. 2019



# COVID led to a cycling boom and shortage of bikes

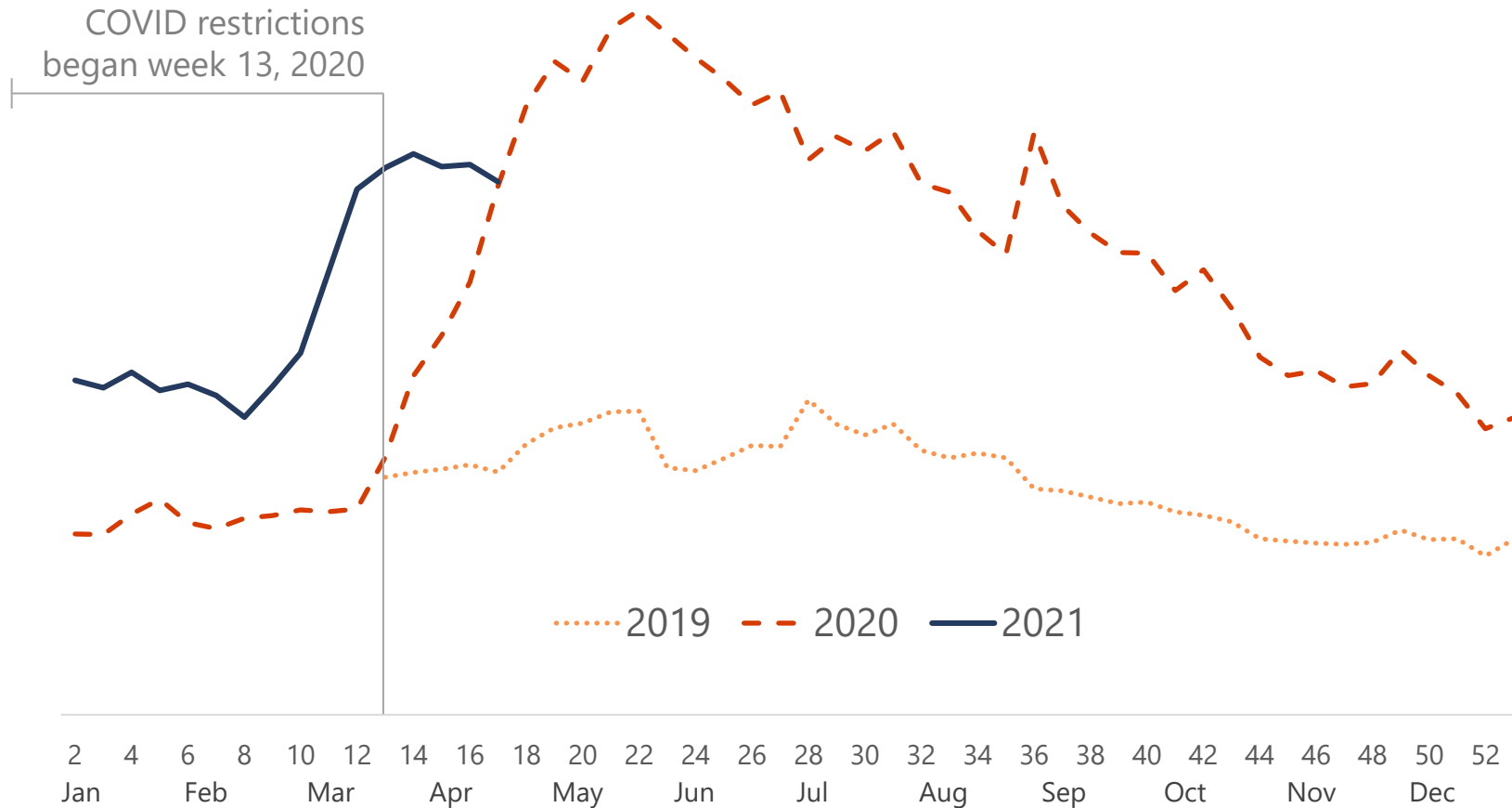






# Cycling clicks grew 106% post COVID in 2020

Trended clicks by week



**+125%**  
2021 clicks vs.  
2019 baseline

**-13%**  
2021 CPCs vs.  
2019 baseline

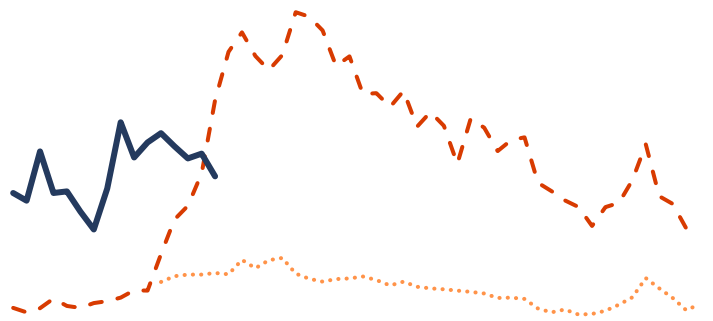


# Cycling categories are seeing a strong start to 2021

Trended clicks by week

Bicycles & Accessories

..... 2019    - - - 2020    — 2021



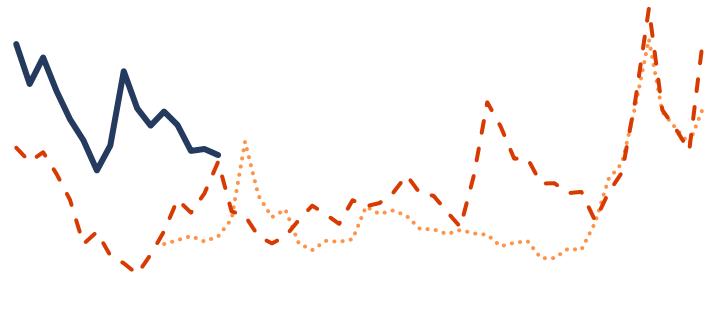
2 5 8 11 14 17 20 23 26 29 32 35 38 41 44 47 50 53

**+108%**  
2021 clicks vs. 2019

**-6%**  
2021 CPC vs. 2019

General Cycling

..... 2019    - - - 2020    — 2021



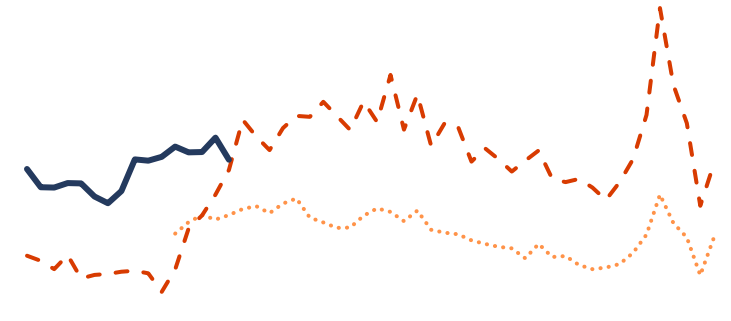
2 5 8 11 14 17 20 23 26 29 32 35 38 41 44 47 50 53

**+63%**  
2021 clicks vs. 2019

**-10%**  
2021 CPC vs. 2019

Cycling Apparel

..... 2019    - - - 2020    — 2021



2 5 8 11 14 17 20 23 26 29 32 35 38 41 44 47 50 53

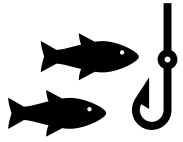
**+42%**  
2021 clicks vs. 2019

**-16%**  
2021 CPC vs. 2019



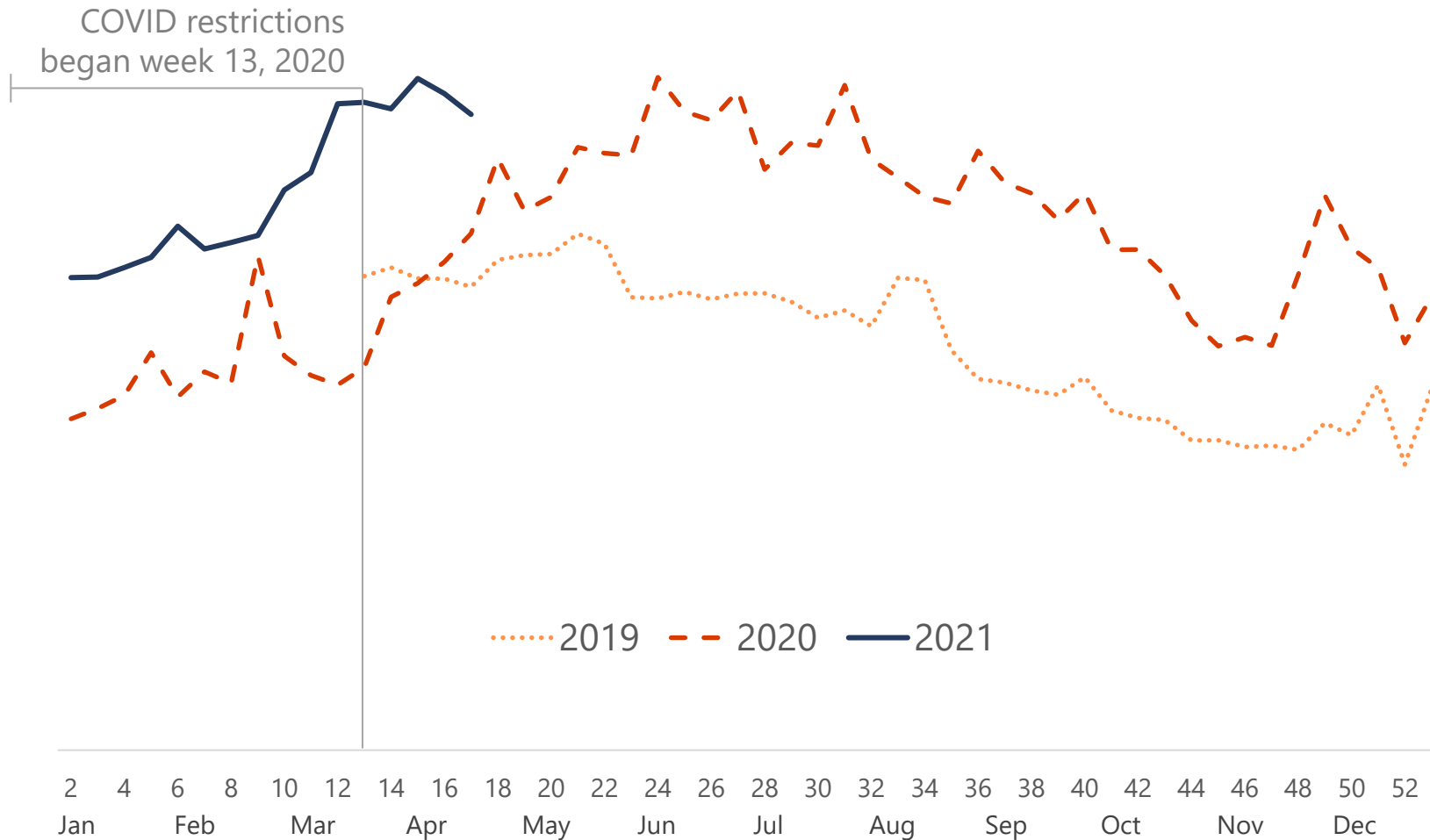
# 50M Americans participated in fishing in 2020





# Fishing clicks grew 31% post COVID in 2020

Trended clicks by week



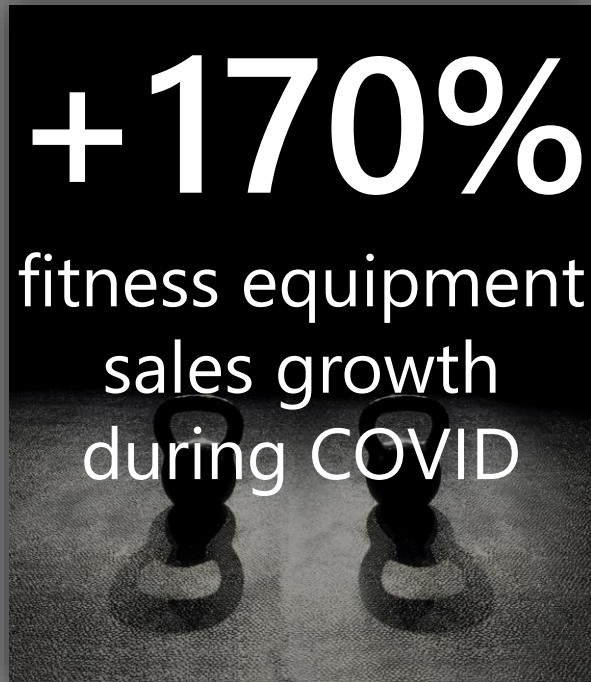
**+38%**  
2021 clicks vs.  
2019 baseline

**+6%**  
2021 CPCs vs.  
2019 baseline





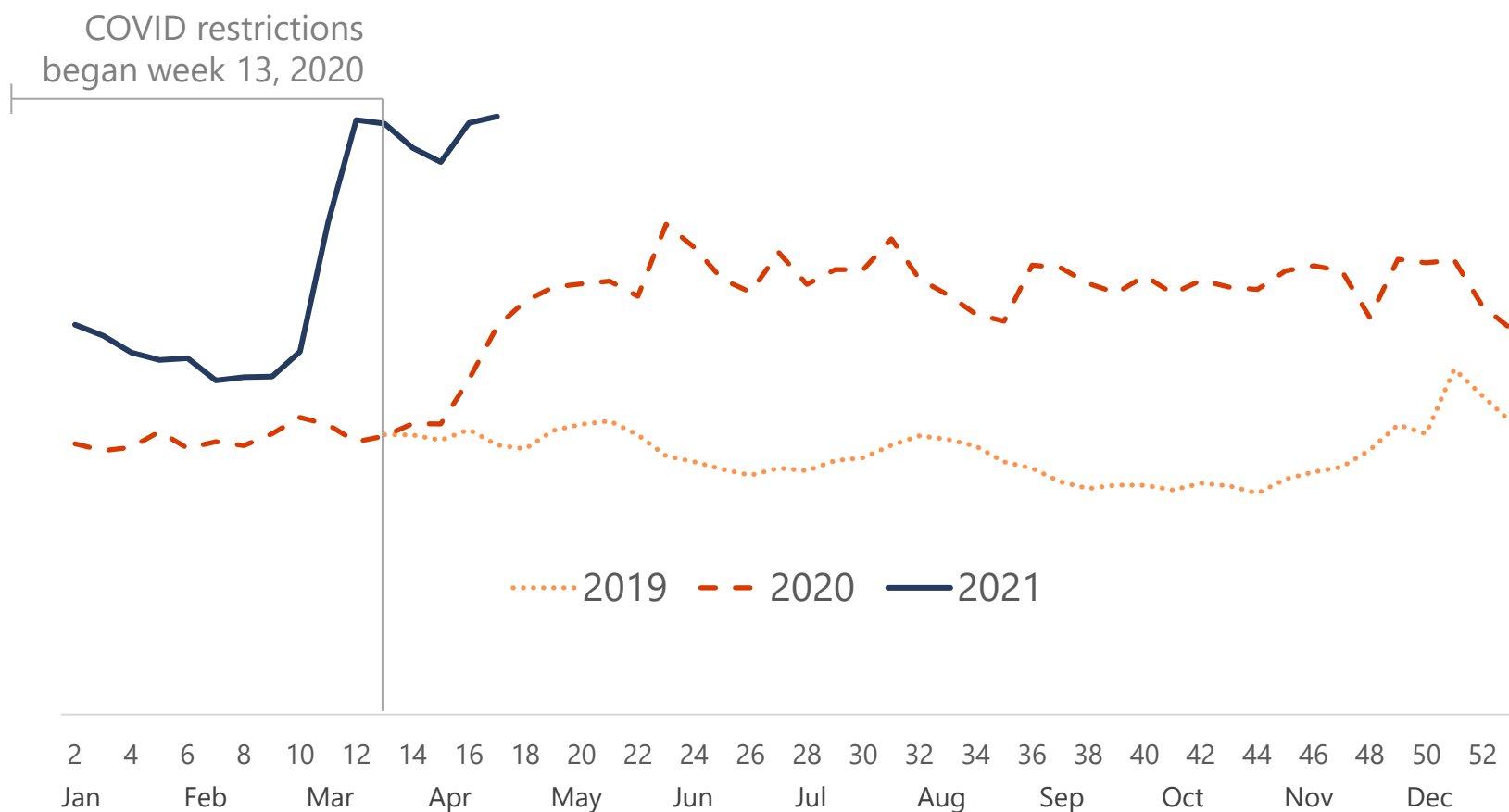
# The Fitness industry will never be the same post COVID





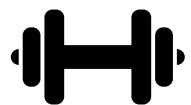
# Sports & Fitness Apparel clicks grew 61% post COVID in 2020

Trended clicks by week



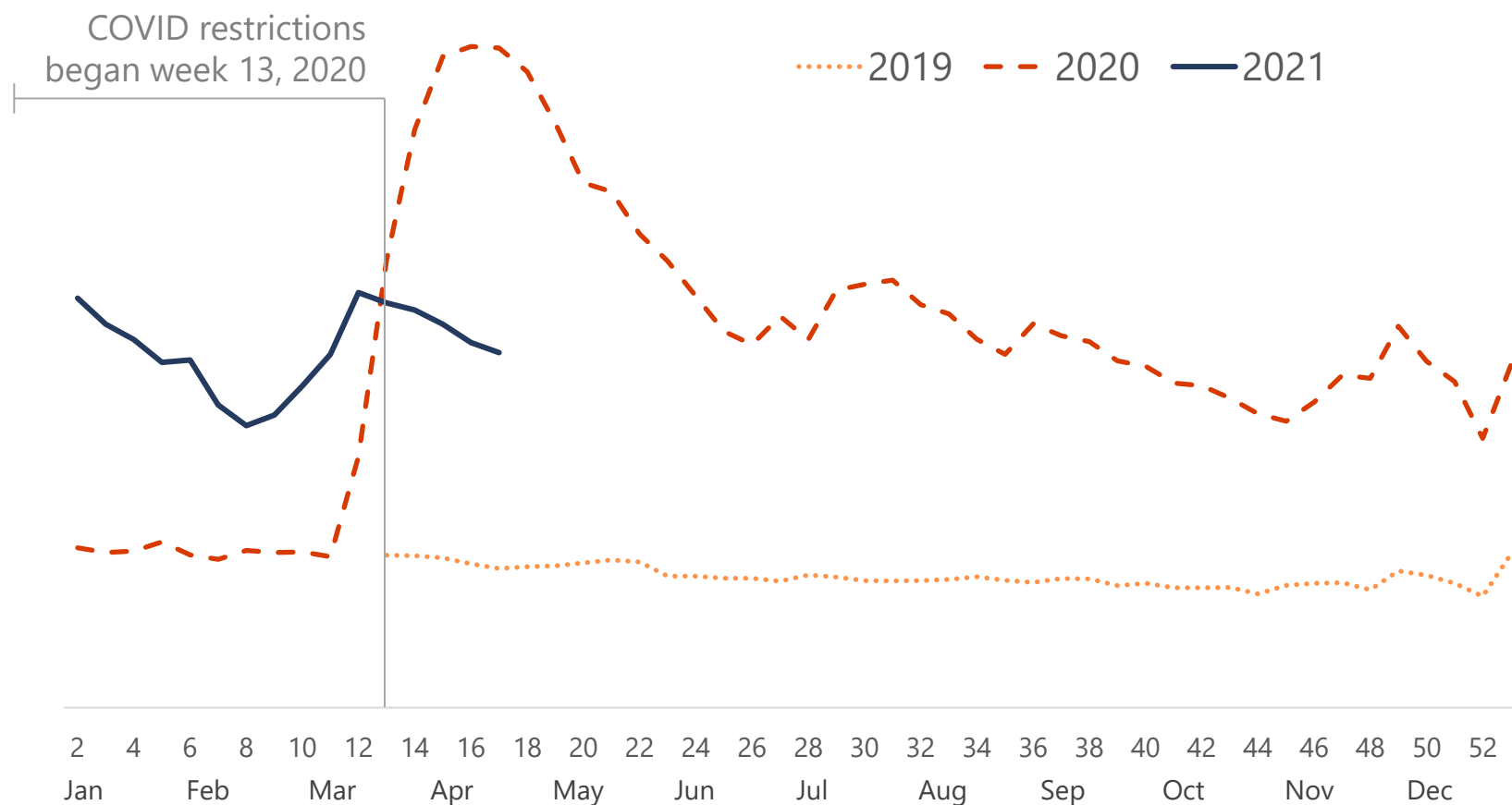
**+109%**  
2021 clicks vs.  
2019 baseline

**+16%**  
2021 CPCs vs.  
2019 baseline



# Fitness Equipment clicks grew 213% post COVID in 2020

Trended clicks by week

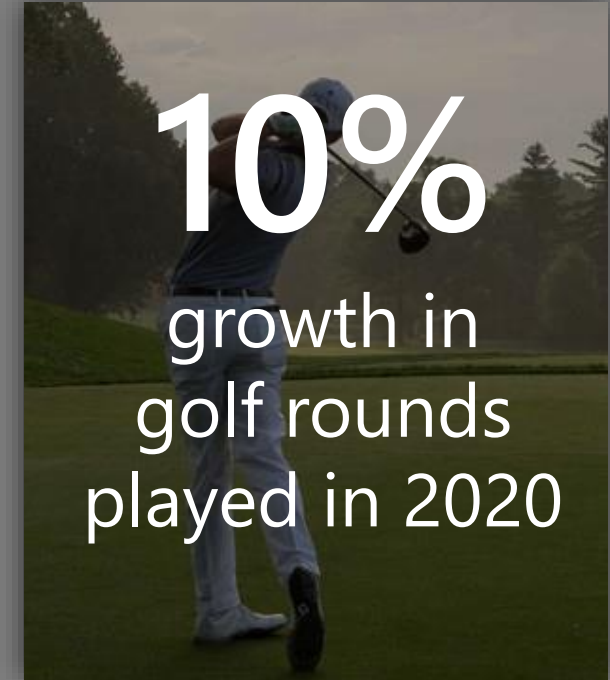
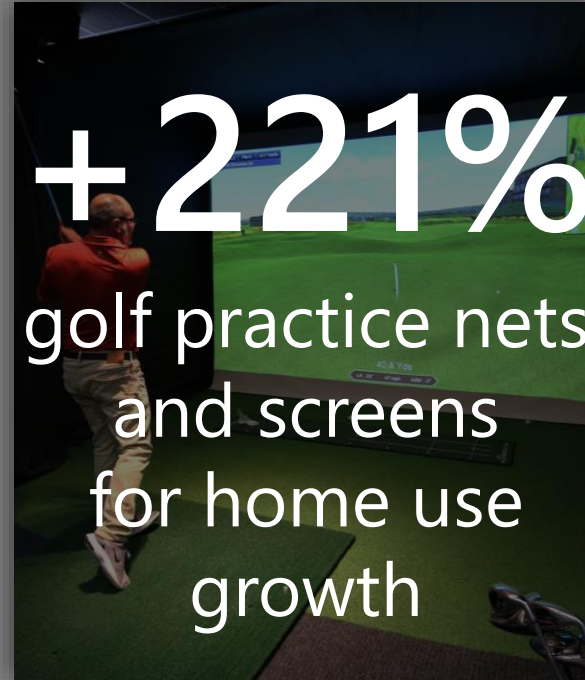


**+159%**  
2021 clicks vs.  
2019 baseline

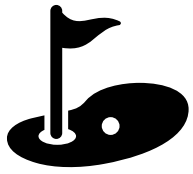
**+12%**  
2021 CPCs vs.  
2019 baseline



Even with golf closed for 2 months, it had a good year overall

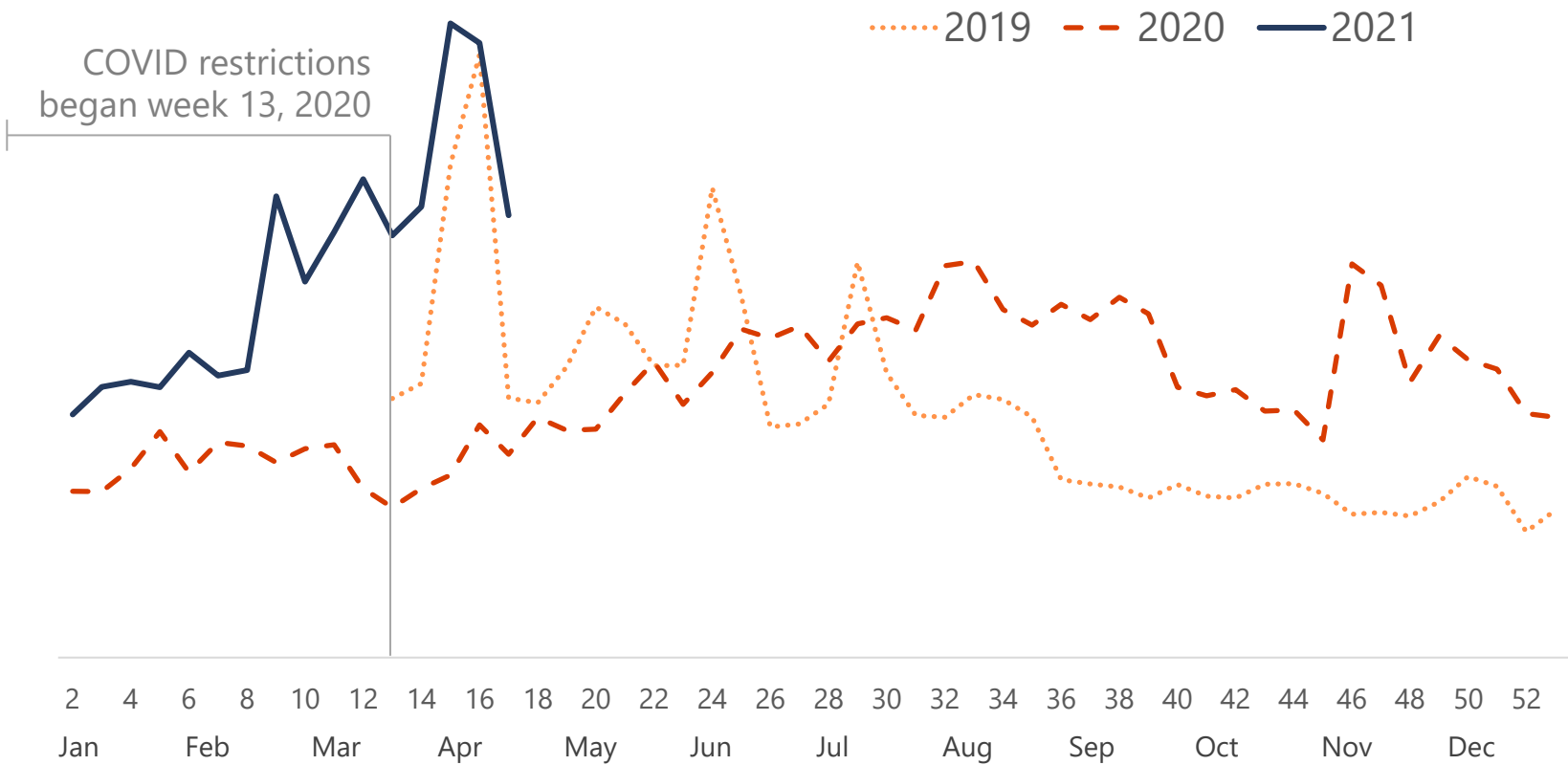






# Golf clicks grew 17% post COVID, despite the slow start

Trended clicks by week



+36%  
2021 clicks vs.  
2019 baseline

+3%  
2021 CPCs vs.  
2019 baseline



# COVID led to an increase in Hunting & Shooting

12%

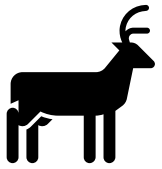
more hunting  
licenses sold in  
2020

1M

more hunters  
in 2020  
vs. 2019

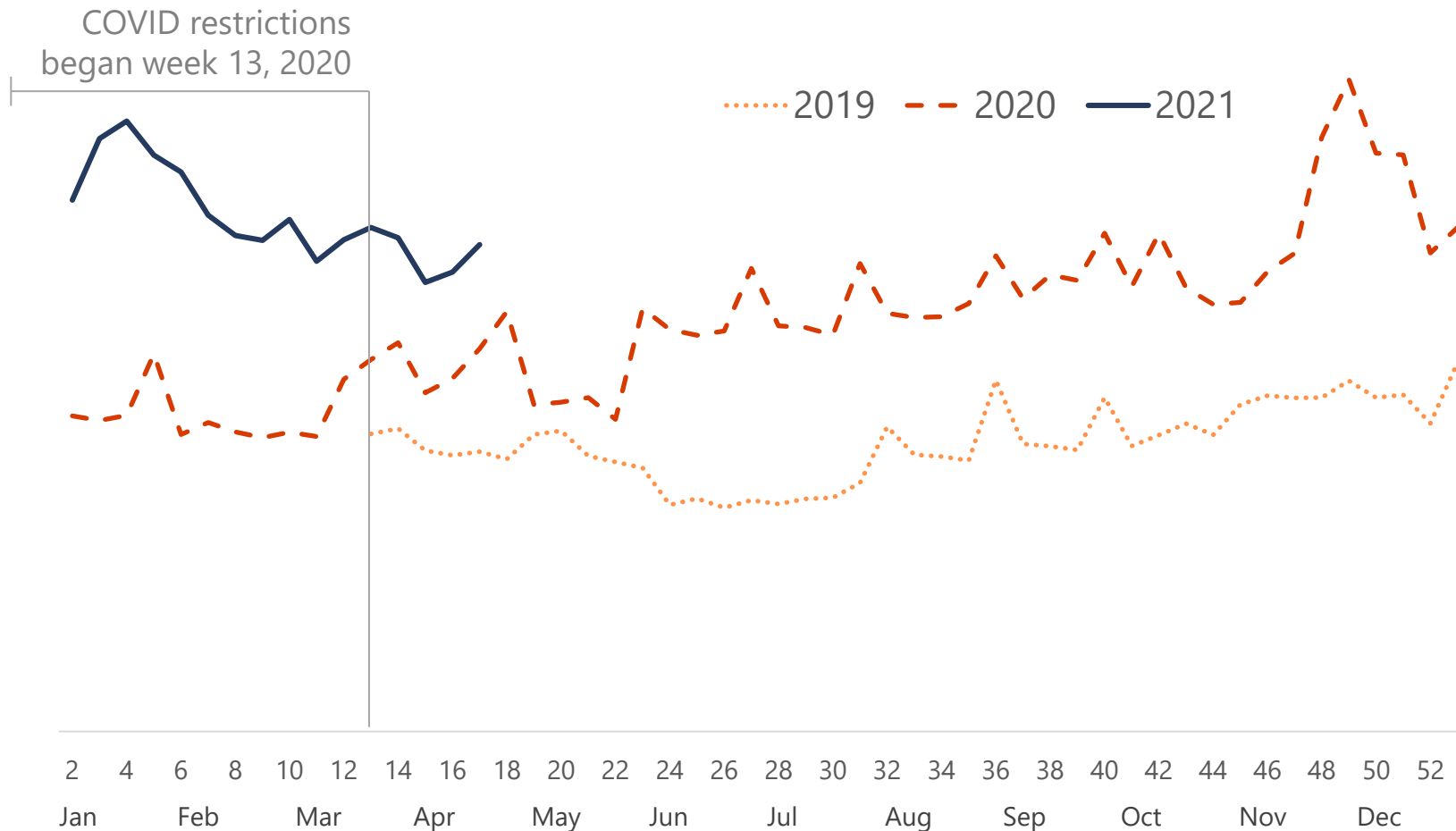
60%

growth in  
firearm sales  
during 2020  
(other factors at  
play here)



# Hunting & Shooting clicks grew 51% post COVID in 2020

Trended clicks by week



**+67%**  
2021 clicks vs.  
2019 baseline

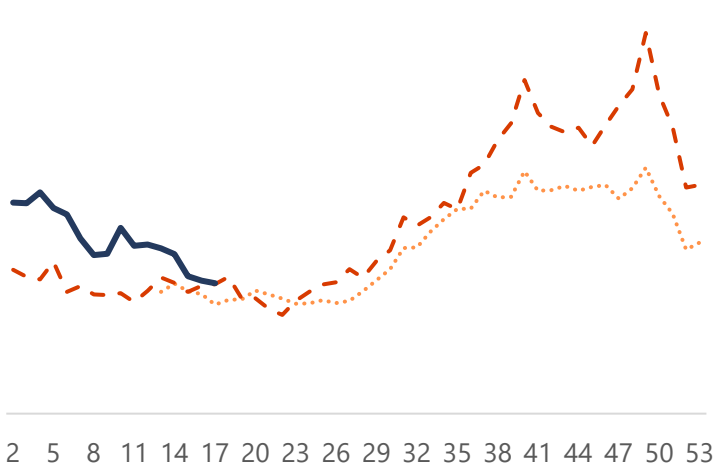
**-5%**  
2021 CPCs vs.  
2019 baseline



# For hunting categories, seasons have an impact

Archery Equipment

..... 2019    - - - 2020    — 2021

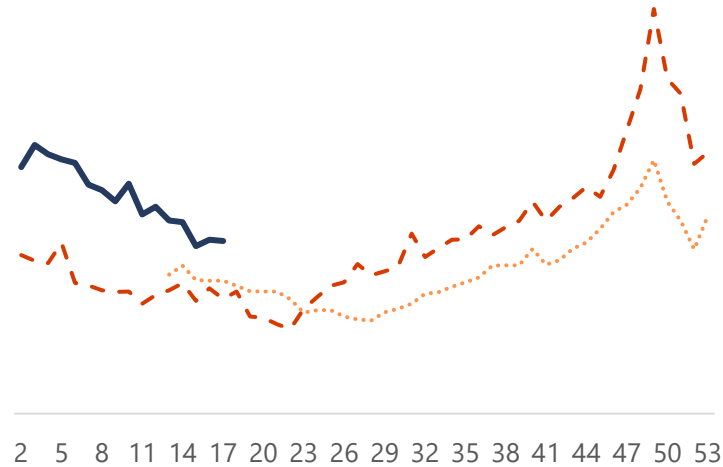


**+20%**  
2021 clicks vs. 2019

**-7%**  
2021 CPC vs. 2019

General Hunting & Shooting

..... 2019    - - - 2020    — 2021

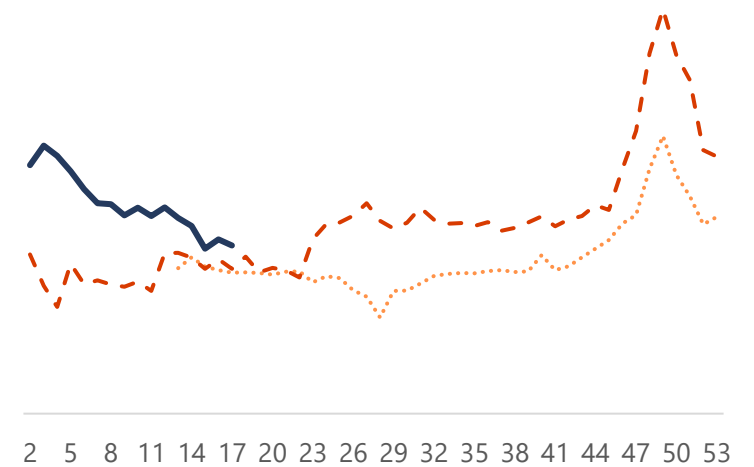


**+31%**  
2021 clicks vs. 2019

**-7%**  
2021 CPC vs. 2019

Hunting & Shooting Equipment

..... 2019    - - - 2020    — 2021



**+22%**  
2021 clicks vs. 2019

**-4%**  
2021 CPC vs. 2019





After a slow 2020, athletic footwear sales are up 32% in 2021

114M

running &  
walking  
participants  
in 2020

-5%

athletic  
footwear  
sales in 2020

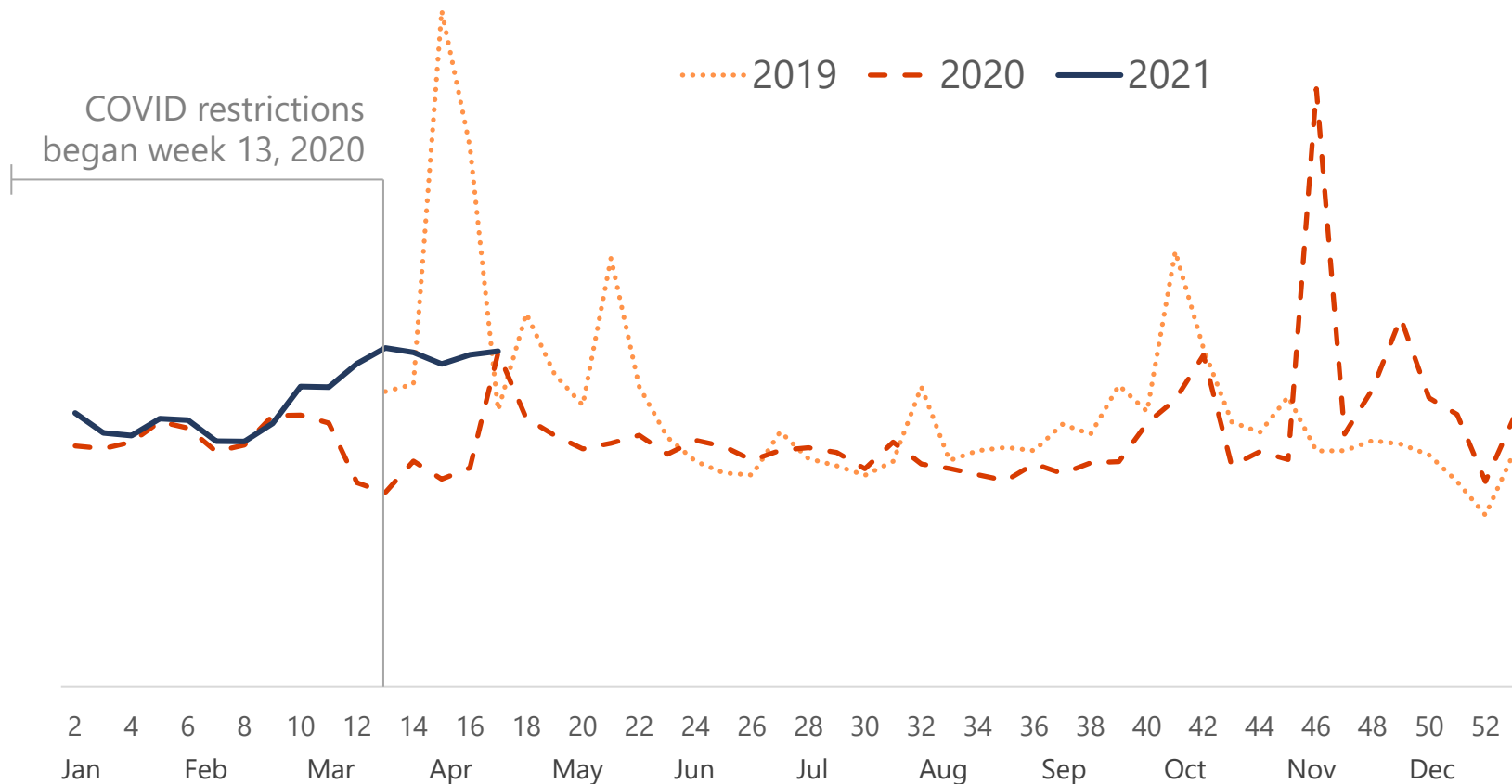
63%

of new  
participants plan  
to continue  
after the  
pandemic



# Running & Walking clicks dropped 10% post COVID in 2020

Trended clicks by week



-20%  
2021 clicks vs.  
2019 baseline

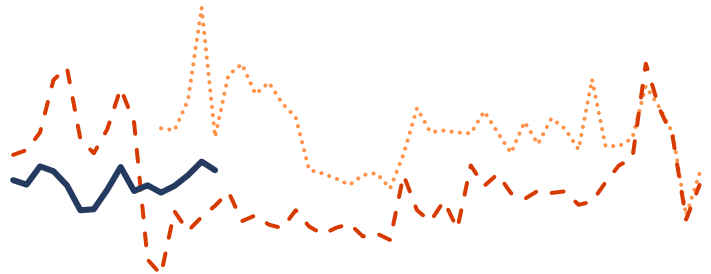
+4%  
2021 CPCs vs.  
2019 baseline



# Running & Walking categories are showing mixed results

General Running & Walking

..... 2019    - - - 2020    — 2021



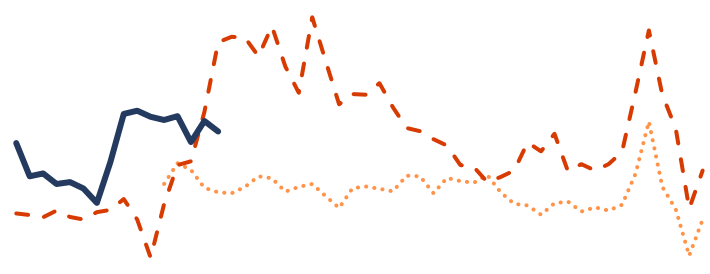
2 5 8 11 14 17 20 23 26 29 32 35 38 41 44 47 50 53

**-25%**  
2021 clicks vs. 2019

**+1%**  
2021 CPC vs. 2019

Running & Walking Equipment

..... 2019    - - - 2020    — 2021



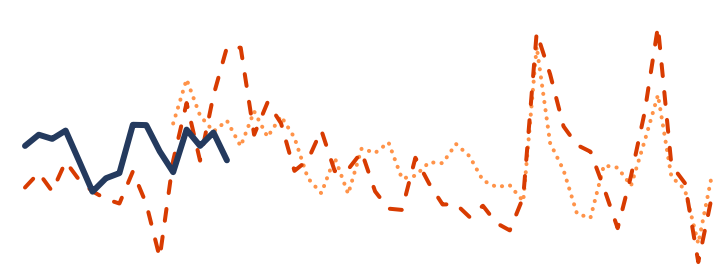
2 5 8 11 14 17 20 23 26 29 32 35 38 41 44 47 50 53

**+23%**  
2021 clicks vs. 2019

**+17%**  
2021 CPC vs. 2019

Running Apparel

..... 2019    - - - 2020    — 2021



2 5 8 11 14 17 20 23 26 29 32 35 38 41 44 47 50 53

**-11%**  
2021 clicks vs. 2019

**-16%**  
2021 CPC vs. 2019



# 2020 restrictions lessened group activity and team sports

2

out of the 23  
team sports  
measured saw  
participation  
increase in 2020

2.4%

drop in inactive  
Americans in  
2020, driven by  
outdoor sports

20%

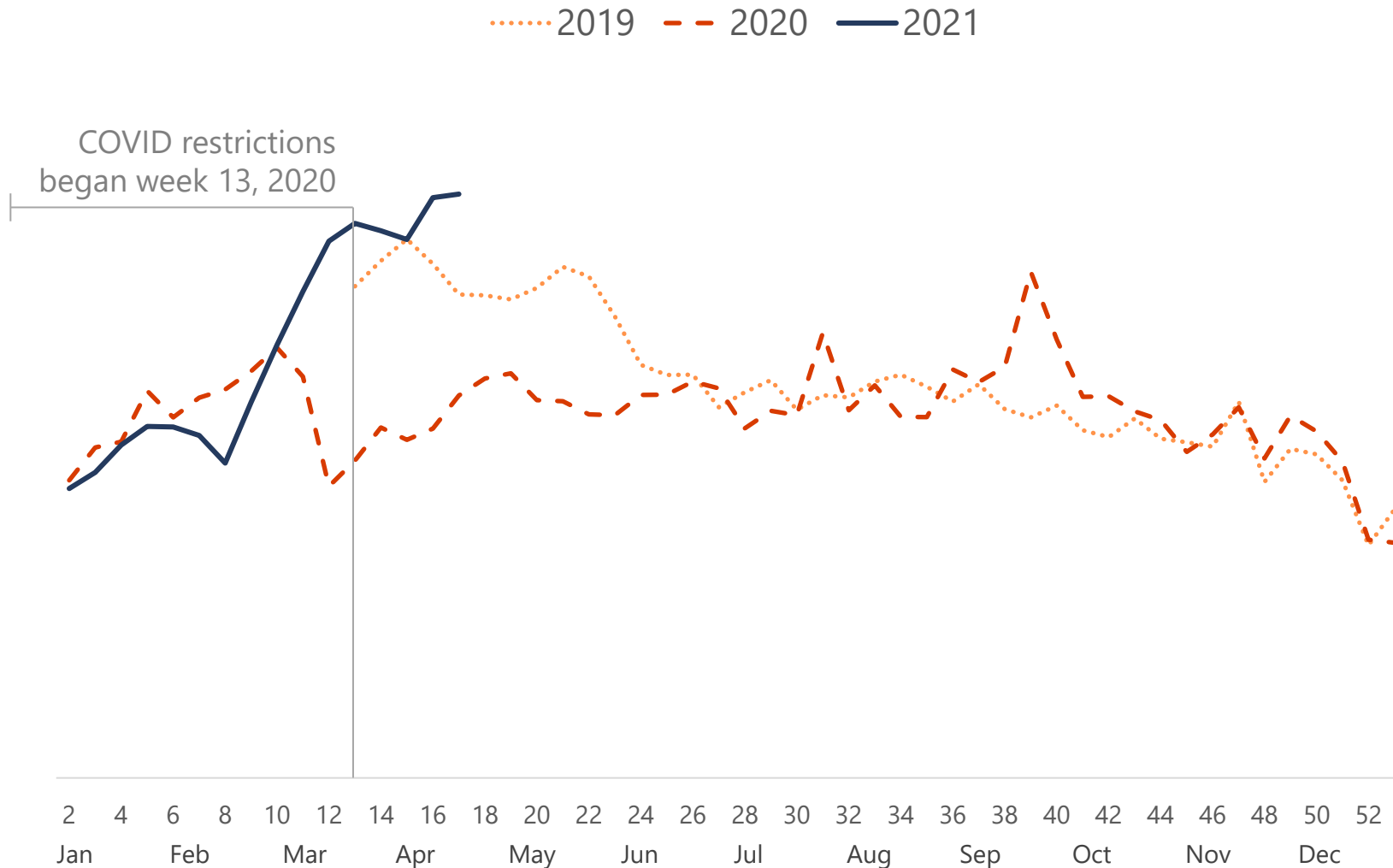
growth in  
training aids for  
home use





# Team Sports clicks dropped 7% post COVID in 2020

Trended clicks by week

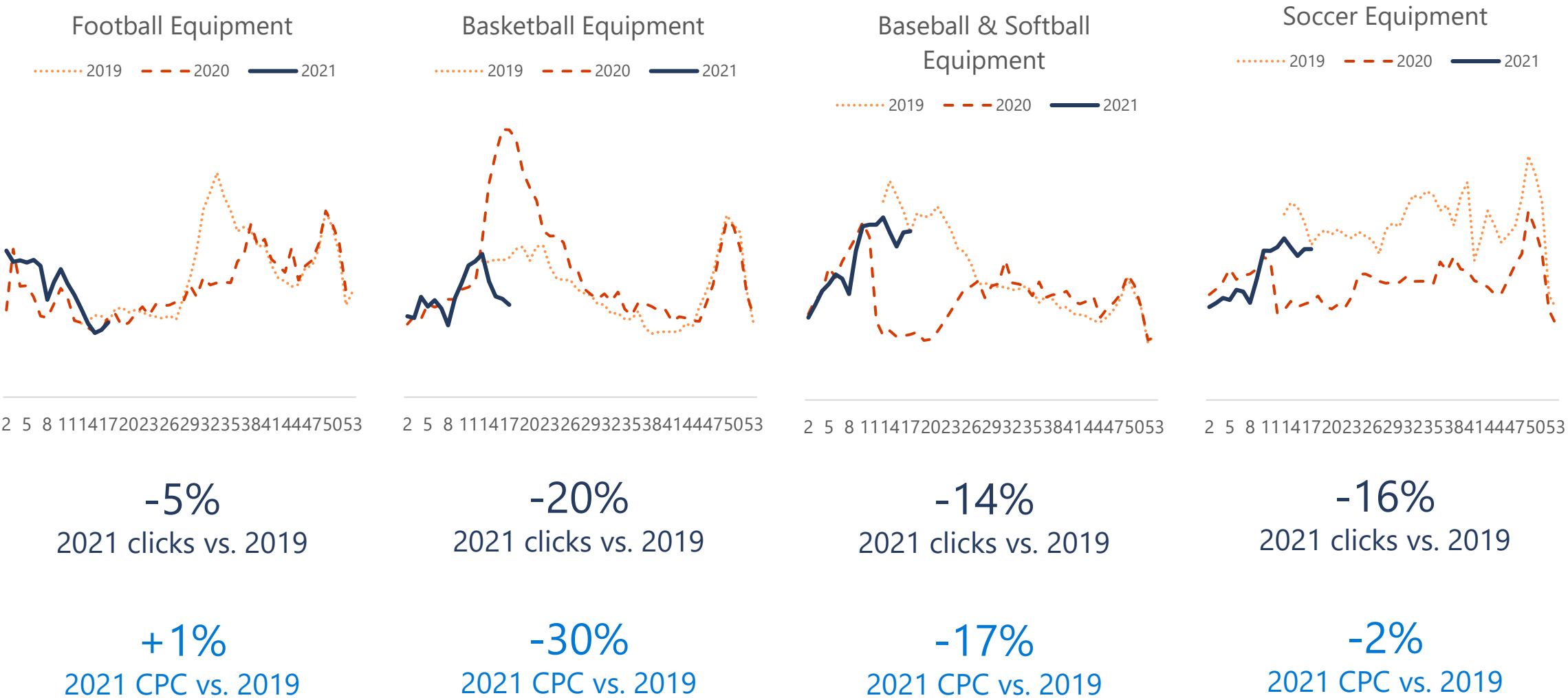


**+10%**  
2021 clicks vs.  
2019 baseline

**-16%**  
2021 CPCs vs.  
2019 baseline



# Team Sports are seeing a slow recovery as restrictions lift



# Takeaways

Sports, Fitness, and the Outdoors were **greatly affected by COVID**, depending on the restrictions.

Forecasting 2021 will be tricky; **most categories will revert to 2019 seasonality** with some shifts due to changing habits.

CPCs have generally **dropped**, so take advantage of the cheaper clicks.

**Inventory has been an issue** for some categories (fitness equipment, cycling, etc.). Take advantage with your search strategy!

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