

ACTION & OUTDOOR SPORTS MARKETING

Workshop Hosted by KORE Software

THE STUDY

ACTION & OUTDOOR SPORTS INCLUDED

- BMX
- Climbing
- Cyclocross
- Fishing
- Kiteboarding
- Motocross
- Mountain Bike
- Skateboard
- Ski
- Snowboard
- Surf
- Wakeboard

WHAT WAS ANALYZED

Posts from athletes, organizations, and events across action & outdoor sports published to social media. Date range includes 1 July, 2021 – 1 July, 2022.

Social media data includes followers, posts, engagement, & valuation data.

Platforms: Facebook, Instagram*, TikTok, Twitter, & YouTube





^{*}Instagram data includes public Business & Creator accounts only. IG Stories data only from authenticated sources.

ESTABLISHING PARTNERSHIPS







ACTION SPORTS ARE SOCIAL

Social media is where the fans are, especially across action sports. At this year's Winter X Games, snow athletes and the X Games official accounts generated 22x more fan engagement on social media than the number of TV viewers across the broadcasts on ESPN & ABC combined.

Also note: The X Games official accounts generated as much fan engagement as all the athletes combined during the Winter X Games 2022.

X GAMES ASPEN 2022

68M

Fan Engagements on Social Media

3.1MCumulative TV
Viewers on ESPN
& ABC broadcasts



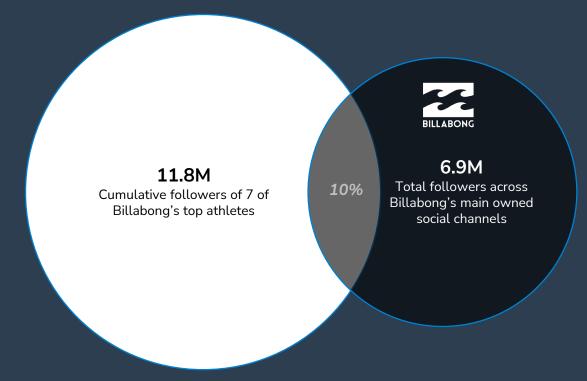


ATHLETES EXPAND BRAND MEGAPHONE

Athletes can amplify your brand message through their own channels to millions of fans / potential consumers.

7 of Billabong's top athletes combine to reach nearly 2x the total followers that the brand does through its owned social channels – and 90% of those aren't followers of the brand!

Key Takeaway: Leverage your athletes to drive more engagement with your brand than you'd be able to do through your owned channels.







SPORTS LANDSCAPE ON SOCIAL MEDIA

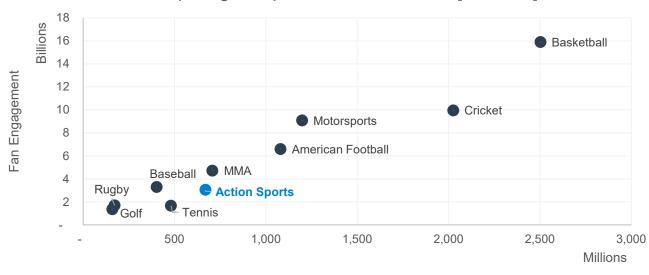
When combined, Action & Outdoor Sports have...

7th most cumulative social media **followers**

8th most fan engagement

...among all sports globally.

Comparing All Sports on Social Media [H1 2022]



Followers

Global football not included in chart for due to axis constraints (15.4B followers, 65B fan engagements)





SKATEBOARD #1 AMONG ACTION SPORTS

Skateboarding entities have the most cumulative followers and fan engagement among the action & outdoor sports.

Snowboarding has the highest average engagement rate, over double the average across action sports.

Outdoor & Action Sports on Social Media



Size of bubble represents volume of posts



PARTNERSHIP EXPECTATIONS



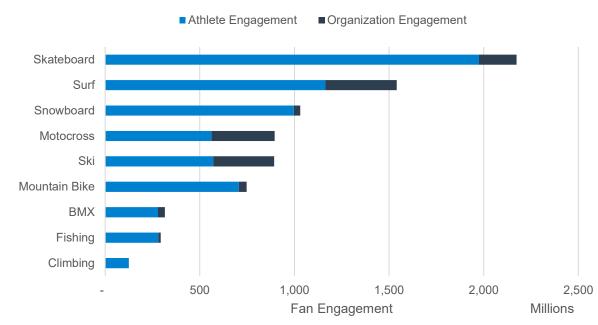




ATHLETES LEAD ON SOCIAL

Across action & outdoor sports, athletes generate 80% of the fan engagement. However, some key organizations drive high engagement with fans, such as the World Surf League, X Games, Street League Skateboard, and Supercross.

Athletes vs Orgs Across Action & Outdoor Sports



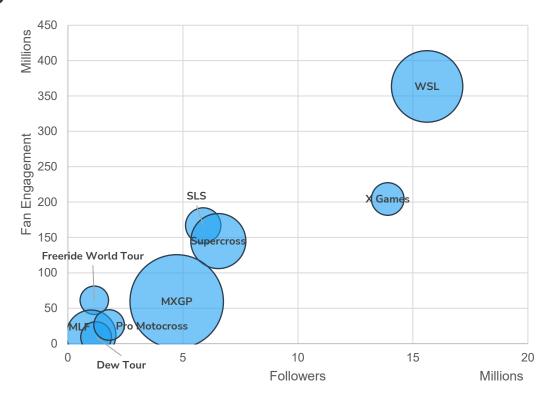


TOP EVENTS & SERIES

Combined, these 9 events & series have 52M followers, earned over 1B fan engagements on 44k posts, and generated \$55M in sponsorship value for brands.

The X Games & FWT have the highest follower growth rate over the past 12 months, both growing between +15-20%, compared to +1% growth for the WSL or Dew Tour.

Action & Outdoor Events & Series





ATHLETES ACROSS OUTDOOR & ACTION SPORTS

| Sport | Avg. Followers Per Athlete | Avg. Posts Per Month | Avg. Engagement Rate | Avg. Brands Promoted | Avg PQ | Avg. AAV per 10k followers |
|---------------|-------------------------------|-------------------------|-------------------------|-------------------------|--------|-------------------------------|
| Skateboard | 337k | 7 | — 19.9% | 8 | 15.0% | \$1,660 |
| Surf | 155k | 6 | 13.3% | 6 | 19.1% | \$1,730 |
| Snowboard | 69k | 4 | 18.8% | 7 | 18.0% | \$2,780 |
| Mountain Bike | 150k | 8 | 8.4% | 13 | 14.0% | \$2,430 |
| Ski | 58k | 6 | 14.4% | 7 | 16.9% | \$2,210 |
| Motocross | 125k | 7 | 8.9% | 16 | 11.9% | \$3,430 |
| Fishing | 158k | 26 | 3.0% | 15 | 13.6% | \$1,750 |
| BMX | 163k | 10 | 6.7% | 9 | 20.4% | \$1,650 |
| Climbing | 248k | 10 | 6.7% | 10 | 17.2% | \$2,020 |

Among these action & outdoor sports, **skateboard** athletes aren't the most active on social media (**fishing** athletes post nearly daily) but skateboarders have the highest average number of followers and highest engagement rate when they post.

Motocross riders tend to generate the most AAV per follower, followed by **snowboarders** and **mountain bikers**, however, that AAV is divided between the most average number of brands promoted.





ENGAGEMENT IS KEY

Athletes with 1M+ followers but low (<1%) engagement rate (ER)

Avoid the pitfall of signing a big name just because they have 1M+ followers.

In order to get your brand message through to the athlete / your partner's followers, those followers need to be engaged when your partner posts about your brand.

| Athlete | Sport | Followers | ER |
|---------------|------------|-----------|------|
| Ronnie Faisst | Motocross | 1.2M | 0.1% |
| Kelly Slater | Surf | 5.8M | 0.2% |
| Ryan Sheckler | Skateboard | 8.1M | 0.4% |
| Lindsey Vonn | Ski | 4.8M | 0.5% |
| Jimmy Chin | Climbing | 3.9M | 0.7% |

Compare to these athletes with 1M+ followers, >10% ER

| | Athlete | ER |
|-----|----------------|-----|
| Avi | Kyle Naegeli | 21% |
| * | Kanoa Igarashi | 18% |
| | Sky Brown | 15% |
| | Amy Purdy | 14% |
| | Eileen Gu | 10% |



ON THE RISE ATHLETES

These athletes across action & outdoor sports have seen massive increases in their social media presence.

All these athletes have:

- Follower Growth: +50% or more
- Engagement Rate: 10% or higher
- AAV per 10k Followers: Over \$2.5k

| Entity | Sport | Follower Growth Rate | Engagement Rate | AAV per 10K Followers |
|-------------------------|---------------|-------------------------|--------------------|--------------------------|
| Maddie Mastro | Snowboard | 319% | 64% | \$16,582 |
| Zeb Powell | Snowboard | 91% | 31% | \$13,872 |
| Alexander Bolshunov | XC Ski | 72% | 26% | \$7,742 |
| Scotty James | Snowboard | 90% | 24% | \$6,875 |
| Aleksander Aamodt Kilde | Ski | 93% | 7% | \$5,403 |
| livo Niskanen | XC Ski | 55% | 8% | \$5,367 |
| Diego Caverzasi | Mountain Bike | 101% | 35% | \$4,300 |
| Leticia Goncalves | Skate | 189% | 15% | \$3,329 |
| Eileen Gu | Ski | 1337% | 10% | \$3,146 |
| Kanoa Igarashi | Surf | 210% | 18% | \$2,772 |
| Miho Nonaka | Climbing | 59% | 12% | \$2,762 |



BRAND PROMOTION THROUGH PARTNERS







TOP BRANDS PROMOTED ACROSS ACTION SPORTS

| Ranking | <u>Brand</u> | Branded Posts (All Promoters) | Avg. PQ | Total Sponsorship Value (AAV) |
|---------|--------------------------|-------------------------------|---------|----------------------------------|
| 1 (-) | Red Bull | 38k | 25.4% | \$22M |
| 2 (-) | ordeserran | 34k | 24.7% | \$19M |
| 3 (-) | GOPCO. Bea HERO. | 17k | 28.4% | \$11M |
| 4 (+1) | MIKE | 14k | 9.9% | \$8.7M |
| 5 (+1) | VANS | 12k | 34.4% | \$7.6M |
| 6 (+1) | RIPCURL | 5.9k | 41.2% | \$5.6M |
| 7 (+51) | QUIKSILVER 🕰 | 5.3k | 32.2% | \$4.2M |
| 8 (+11) | BILLA | 2.9k | 35.9% | \$3.9M |
| 9 (+1) | | 14k | 19.8% | \$3.8M |
| 10 (-6) | ROCKSTAR ENERGY DRINK | 5.8k | 26.6% | \$3.7M |

Top Industries by AAV



Sporting Goods & Apparel (\$102M)



Beverage (\$53M)



Automotive & Powersports (\$40M)



Consumer Goods & Electronics (\$17M)





SKATEBOARD

Followers

Fan Engagement

Sponsorship Value

239M

2.2B

\$47M

Rank Among Action Sports 1 1 2

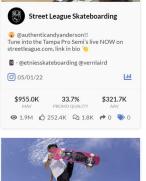
| Top Athletes | <u>Followers</u> | Engagement |
|----------------|------------------|------------|
| Rayssa Leal | 11.8M | 337M |
| Joey Brezinski | 1.7M | 275M |
| Sky Brown | 4M | 166M |
| Tony Hawk | 20.3M | 112M |
| Yuto Horigome | 2.7M | 92M |

| Top Brands | AAV |
|------------|--------|
| NIKE | \$7.7M |
| Modelstrak | \$5.3M |
| VANS | \$4.2M |
| Red Bull | \$2.6M |
| TEN. | \$1.1M |











Rayssa Leal

Tia #foryou #foryoupage

07/15/21





SURF

Followers

Fan Engagement

Sponsorship Value

156M

1.6B

\$43M

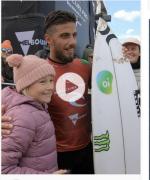
Rank Among 2 Action Sports

| Top Athletes | <u>Followers</u> | <u>Engagement</u> |
|----------------------|------------------|-------------------|
| Rio Waida | 820k | 180M |
| Mariona Pujol Merino | 1.4M | 159M |
| Pedro Scooby Vianna | 8.9M | 84M |
| Anastasia Ashley | 4.2M | 68M |
| Jamie O'Brien | 2.6M | 54M |
| | | 1 |

| Top Brands | AAV |
|---------------|--------|
| RIPCURL | \$5.6M |
| QUIKSILVER 🕰 | \$4.0M |
| BILLA BONG | \$3.6M |
| Red Bull | \$2.6M |
| Hurley)(| \$2.0M |



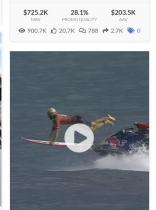
















Kai Lenny

speed. Thank you Red Bull

07/28/21

A couple clips from the training cam. Two

awesome days working on new moves. I can't

Hurley TAG Heuer GoPro KT Surfing CARIUMA

wait to bring them to the ocean with 3X the



0 02/02/22

\$1.2M











More from Nazaré, courtesy of @pedrosco Recap all of the action, link in bio. @tudory



SNOWBOARD

Followers

Fan Engagement

Sponsorship Value

49M

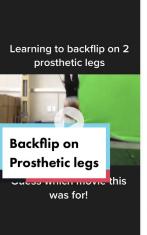
1.0B

\$15M

Rank Among 7
Action Sports 7

| Top Athletes | <u>Followers</u> | <u>Engagement</u> |
|----------------|------------------|-------------------|
| Shaun White | 7.8M | 331M |
| Maddie Mastro | 725k | 172M |
| Scotty James | 690k | 84M |
| Amy Purdy | 1.1M | 68M |
| Brenna Huckaby | 630k | 50M |





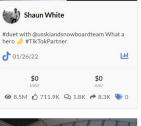














Messed around and got addicted to snowboarding



Maddie Mastro







MOTOCROSS

Followers

Fan Engagement

Sponsorship Value

140M

895M

\$65M

Rank Among
Action Sports
4
1

| Top Athletes | <u>Followers</u> | Engagement |
|---------------|------------------|------------|
| Graham Jarvis | 3.3M | 62M |
| Cruise Texter | 245k | 37M |
| Axell Hodges | 1.8M | 32M |
| Haiden Deegan | 1.7M | 29M |
| Mario Roman | 685k | 19M |

| Top Brands | AAV |
|---------------------|--------|
| MONSTER | \$2.2M |
| Red Bull | \$1.9M |
| AHAMAY | \$785k |
| KVA | \$680k |
| <i>Malpinestars</i> | \$490k |

























Relive some of the best moments from the Monster Energy Supercross season.

SUBSCRIBE to the Monster Energy Super YouTube channel for riding action, highlig interviews and exclusive behind-the-scen content: feld.ly/v1goli

WATCH LIVE + ON-DEMAND Monster Energy Supercross is available or via NBCSN and streaming on Peacock in t



SKI

Followers

Fan Engagement

Sponsorship Value

109M

893M

\$27M

Rank Among 5 5 Action Sports

| Top Athletes | Followers | Engagement |
|-----------------|-----------|-------------------|
| Owen Leeper | 194k | 47M |
| Josh Dueck | 89k | 35M |
| Mickael Bimboes | 727k | 34M |
| Dominique Ohaco | 172k | 29M |
| Eileen Gu | 2M | 28M |

| Top Brands | AAV |
|--------------------------|--------|
| | \$2.2M |
| Red Bull | \$2.0M |
| GoPro. | \$1.3M |
| Intermountain Healthcare | \$795k |
| ATOMIC | \$740k |



Owen Leeper

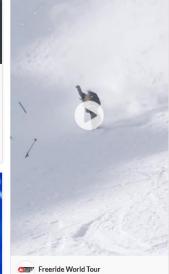
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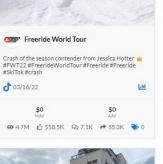
\$6.0M

When your buddies won't give you a ride up!

10,2%

\$612.7K







Eileen Gu

12/13/21

\$93.3K

If I had a dollar for every tim

uncomfortably when a guy h #JBLGreekOut #freeski #gii

Juegos C

some dude: do u



MOUNTAIN BIKE

Followers

Fan Engagement

Sponsorship Value

143M

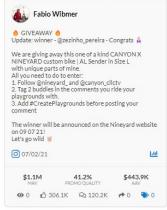
782M

\$35M

Rank Among Action Sports 3

| Top Athletes | <u>Followers</u> | Engagement | Top Brands | AAV |
|-----------------|------------------|-------------------|-------------------|--------|
| Antoni Villoni | 2.0M | 40M | Red Bull | \$4.9M |
| Sam Pilgrim | 3.2M | 37M | GOPCO. Be a HERO. | \$3.6M |
| Mark Matthews | 1.2M | 31M | UOVIIA.3 | \$1.6M |
| Danny Macaskill | 4.4M | 30M | SHIMANO | \$1.5M |
| Gabriel Wibmer | 1.7M | 28M | S.COTT | \$1.1M |



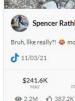














BMX

Followers

Fan Engagement

Sponsorship Value

55M

316M

\$9.8M

Rank Among 6 Action Sports

| Top Athletes | <u>Followers</u> | <u>Engagement</u> |
|------------------|------------------|-------------------|
| Matthias Dandois | 1.5M | 50M |
| Ryan Taylor | 3.1M | 26M |
| Logan Martin | 630k | 22M |
| Scotty Cranmer | 2.4M | 19M |
| Daniel Dhers | 1.3M | 14M |

| Top Brands | AAV |
|--------------------------|--------|
| VANS | \$1.3M |
| Red Bull | \$915k |
| MONTHER | \$555k |
| FYFT | \$505k |
| ROCKSTAR ENERGY DRINK | \$315k |















Logan Martin

'Tell me your an Olympic one your an Olympic Gold

\$439.8K





Mariana Pajon

a @55nanking / @uci cycling

FISHING

Followers

Fan Engagement

Sponsorship Value

18M

293M

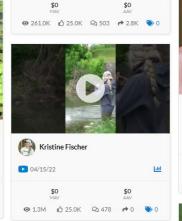
\$3.6M

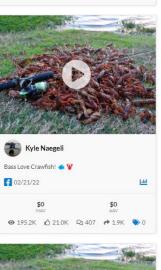
Rank Among 9 8 9 Action Sports

| Top Athletes | <u>Followers</u> | <u>Engagement</u> |
|------------------|------------------|-------------------|
| Kyle Naegeli | 2.1M | 144M |
| Dave Mercer | 362k | 47M |
| Marlin LeFever | 492k | 18M |
| Kristine Fischer | 167k | 11M |
| Mike Iaconelli | 917k | 5.8M |















@ 0 0 ₺ 21.6K













CLIMBING

Followers

Fan Engagement

Sponsorship Value

23M

124M

\$4.7M

Rank Among 9 8 Action Sports

| Top Athletes | <u>Followers</u> | Engagement |
|------------------|------------------|------------|
| Jimmy Chin | 3.9M | 21M |
| Adam Ondra | 1.4M | 15M |
| Alex Honnold | 3.3M | 14M |
| Stefano Ghisolfi | 330k | 9.1M |
| Michael Mawem | 165k | 6.0M |

| Top Brands | AAV |
|----------------------|--------|
| THE NORTH FACE | \$1.6M |
| 🔖 Black Diamonå | \$285k |
| FrictionLabs® | \$230k |
| Red Bull | \$225k |
| adidas | \$220k |











@jimmychin has a new book out that highlights his best photos and adventures from his wide ranging career. I'm a little biased since I was on many of the trips with him, but I think it's an incredible book. Inspiring images and tons of fun stories. I'm doing an IG live with him on Thursday evening to talk about the book and share some of the various expedition stories. There And Back makes a perfect gift for the holiday... link in bio









For my last real day of climbing in season I went up and onsight sold Universe (13 pitch 5.11a) on the climbing and incredible views of the stop and take pictures mid scram on pitch 10 that I snapped a few of The walk off is maybe the worst of Yosemite, but worth it to get to the Plus, it's hard to rap without a rou Super fun outing.



| \$27.4K | | 3.0% | |
|---------|---|------------|------|
| MAV | | PROMO QUAL | |
| 0 | Ď | 186.3K | Q 68 |







EVALUATING PARTNERSHIPS







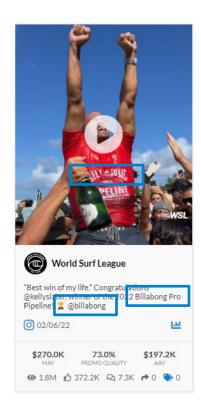
TOP PARTNERSHIPS: LEAGUE & EVENT RIGHTS

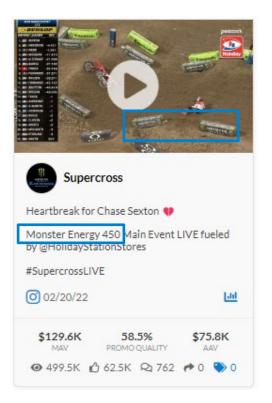
The World Surf League & Supercross were the top 2 entities across action & outdoor sports by sponsorship value generated. Their branding at the event included:

- Logos on or near athletes (jerseys or race barriers)
- Event naming rights
- · Direct mentions & tags on social

Each of these organizations included at least one brand in over 60% of their posts.

Takeaway: competition is high with league / event partners, but these partnerships can generate significant brand value.







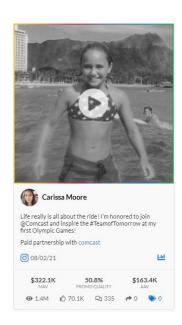


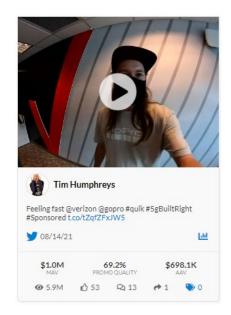
PARTNERING WITH ATHLETES

Non-endemic brand partners tend to receive fewer branded posts than endemic brands because their logos aren't as common in and around competitions.

For these partnerships, maximizing promotion quality is key.

- Clear, large logo (at the start of the video)
- Limited competition (max 1-2 other brands)
- Natural integration (WHY your brand is partnered with that athlete)



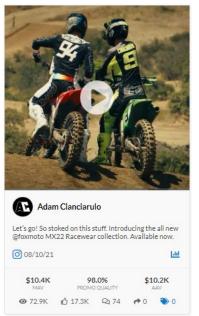


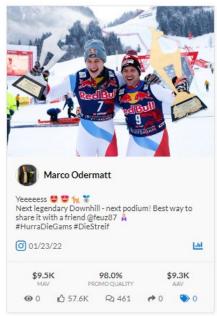


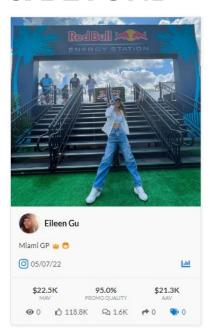


ENDEMIC BRANDS – IN THE COMPETITION & BEYOND









Around competitions, make sure your logos are visible before, during, and after your partners perform. Don't forget about lifestyle and non-competition content, too. You need to understand what content themes are most engaging to the fans for each of your partners and have them promote your brand with that type of content (lifestyle, family, practice sessions, etc.).



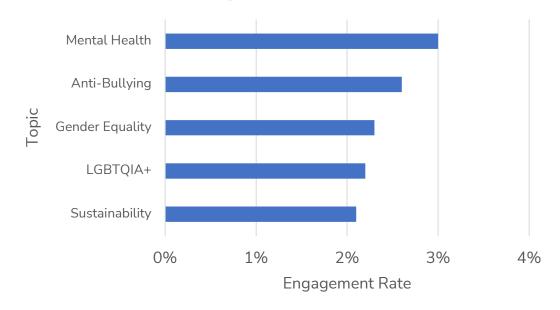
TOPICS FANS CARE ABOUT

Posts focusing on **Mental Health** had the highest engagement rate by fans of action & outdoor sports entities.

Compare that topics with low engagement rates like **Cryptocurrency** (0.2%), **Gambling** (0.3%), or even **Fitness / Training** at just 0.8%.

Takeaway: Knowing what topics your partners post about and their fans engage with can help you match the right partner(s) with product launches, align your portfolio with your brand values, and craft targeted messaging.





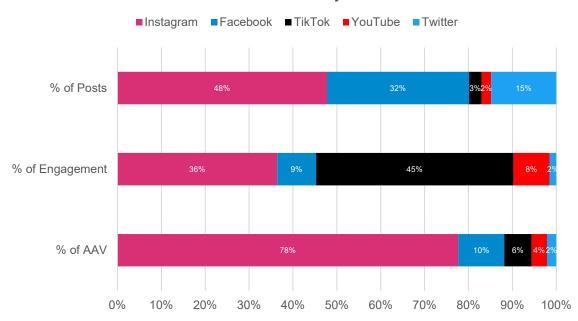


BEST PRACTICE: VIDEO CONTENT

Action & Outdoor sports athletes post the most to Instagram. However, fans engage the most on TikTok, averaging 20x more engagement per post than Instagram. YouTube averages the 2nd most engagement per post.

Takeaway: Fans love video content from athletes. Encourage them to include your brand in their casual (TikTok) and more formal (IG, YT) edited videos.

Platform Analysis







BEST PRACTICE: PROMOTE ONE BRAND PER POST



DON'T DO: SEA OF BRAND MENTIONS OR HASHTAGS

When a partner tags all of their sponsors in one post indiscriminately, it reduces the quality and impact for all of them.

DO: SINGULAR BRAND PROMOTION

Instead of promoting multiple sponsors in each post, encourage your partners to promote just one brand in each post, maximizing the promotion quality for your brand and the impact of the brand messaging toward the fans / consumers.







KEY TAKEAWAYS

ENGAGEMENT IS KEY

Getting your brand message through to potential consumers is the #1 goal. Study the demographics of your partners' followers, understand what topics and content they engage with, then work with your partner to promote your brand with that kind of content.

LEAN INTO VIDEO CONTENT

TikTok has the highest average engagement per post. YouTube and Instagram also see high fan engagement. Work with your partners to promote your brand in their video posts.

QUALITY OF PROMOTION MATTERS

When your partners promote your brand, ask them to focus on just your brand, rather than lumping your brand in with all their other sponsors.



THANKS!

Have questions about the deck / data? Reach out to us!

insights@hookit.com





We help **optimize your portfolio** and give you a **competitive advantage** in this space

SOFTWARE

- One Platform
- · One Source of Truth
- Endless Optimization

DATA

- The Industry's Richest Dataset
- +100 Data Integrations
- 2B Fan & Fan Interactions

CONSULTING

- · Unmatched Insights
- Industry Benchmarks
- · Portfolio Best Practices



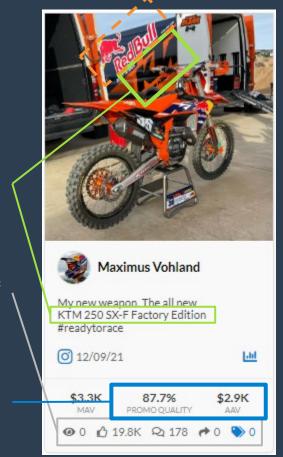


QUANTIFYING SPONSORSHIP VALUE

Step 1: Identify Brand Promotion

Step 2: Max Ad Value (MAV) = Total engagements x CPEs

Step 3: Adjusted Ad Value = MAV x Promo Quality



Promotion Quality Factors



For comparison, Red Bull received 25% Promo Quality from this post.



