Using social data to chart the trends and category shifts that matter most

FEB - JULY 2021
Welcome to the fifth edition of Crowd Tracks – our social data series highlighting trends at the intersection of brands and culture using our Culture At Scale method. This time, we’re exploring sports fandom, documenting what feels like a watershed moment for supporters of all types of sport. By analysing social data from the last six months, we can track sentiment, explore conversation at scale and uncover learnings for brands playing in this space.

Highlights from the report include:

— A look at how fan protests have mobilised on social platforms across the world – including a fan-made F1 car design and new club policies that have emerged from the European Super League fallout.

— An analysis of Instagram data to track emergent fandom, with a focus on specific sports that have flourished during the pandemic. We also chart the rise of NFTs for fan groups through our spotlight on NBA Top Shot.

— Under the trends section we explore the rise of new, immersive experiences for fans, featuring 5G stadiums and VR. We then turn our attention to the power of shared fan values and how online conversations can encourage clubs to take a stance.

If you have any questions about this report or our Culture At Scale method, please get in touch.
**Viral Stories**

**THE TOP NEWS STORIES SHARED ON SOCIAL**

**GLOBAL**

The global rugby fan base increased by two thirds in the last decade (and doubled in emerging markets), World Rugby has published an ambitious report to grow followers worldwide by another 10% by 2025.

**BRAZIL**

Fans of Serie A champions Flamengo were in uproar as their club signed a deal with regional department store Havan, the darling brand of president Bolsonaro.

**US**

To boost investment in women’s sport, former Olympic athlete Angela Ruggiero is calling on fans to download their digital footprint (all their posts and engagements) in order to pinpoint underserved supporter groups, such as women’s basketball.

**UK**

Team GB bring home a historic win of gold medals at Tokyo Olympics, with many describing the diverse athletes as role models for society, a balm for a divided nation and a driver for further grassroots participation in sports.

**JAPAN**

Naomi Osaka recently returned to social media to share her Vogue cover shots, following her withdrawal from all media discussions at the French Open in order to protect her mental health.

**FRANCE**

Formula 1 McLaren fans influenced a special livery design for the Monaco Grand Prix, celebrating a partnership dating back to the 1960s. “The fan reaction was unbelievable,” said Gulf Oil CEO Mike Jones.

**INDIA**

Fantasy cricket leagues have been booming in India. eSports platform EWar Games grew their users five times over during the country’s recent lockdown, and one cricket influencer raked in over £6,500 by sharing tips during the England vs India test series.
The Cost Of Fandom

UNPACKING THE THORNY ISSUES UNITING AND DIVIDING SUPPORTERS WORLDWIDE

POLARISED VIEWS
Racism and ongoing BLM protests have driven a whole host of online conversation spikes. In America, the NFL saw fans divided over those who support players taking the knee and those who don’t (often calling out the NFL for bowing down to ‘performative racism’). This divide is equally apparent in the UK, where racist abuse of England players in the final of the Euros was met with widespread condemnation.

PLAYERS SPEAKING OUT
In tennis, Naomi Osaka drove conversation for her media boycott, raising the issue of mental health in sport. Mental health has been dramatically foregrounded by athletes such as Simone Biles at the Olympics. In India, the recent farmers’ protests saw celebrities including Greta Thunberg support the movement, while cricket legend Sachin Tendulkar was against foreign voices ‘interfering’ by using the hashtag. This was met with backlash online, as he was accused of standing with the ‘fascist powers’ and not having the interests of farmers at heart.

TRACKING NEW SPORT FANDOMS
Staying in India, the IPL had been criticised for partnering with Chinese sponsors such as VIVO. There has been considerable negativity toward Chinese market dominance in the country and many fans have called to boycott the T-20 league. Meanwhile, in the UK, Manchester United fans are calling for fan ownership – the business is the 62nd largest plc in the country – using the hashtag #glazersout.

Sources: Instagram, Reddit and Tumblr data, English speaking markets (global)
Tracking New Sport Fandoms

ANALYSING THOUSANDS OF INSTAGRAM IMAGES FILTERED BY ACTIONS FROM AROUND THE WORLD TO DISCOVER THE GROWING SPORT FANDOMS TO KEEP AN EYE ON

The pandemic has changed not only how we consume sport, but also the sports we engage with. Looking at trending imagery of sports shared on Instagram, we can see that many of us have experimented with watching, playing and supporting a range of new genres.

While gym culture is already a mainstay on Instagram, bodybuilding has emerged as a more extreme version as individuals look for new ways to gain muscle by learning from others. Imagery of bodybuilding has increased by 45% in the last six months. Similarly, there’s been an increased interest in combat sports such as wrestling (+70%) and boxing (+55%), largely thanks to YouTube’s new coverage piquing interest in young men.

In the last six months, dancing (+215%) and cheerleading (+168%) have also grown in popularity, with many referencing TikTok and shows such as Cheer as key inspiration. Skateboarding (+98%) is another that goes from strength to strength, gaining popularity with new audiences, especially young women. With skateboarding having debuted at the Olympics, engagement can only expect to grow further.

Finally, racing in all forms – including motorcycling (+23%), cycling (+17%) and running (+102%) – has prospered, reflecting the rise in those taking part in individual fitness activities (potentially due to lockdowns) and the growth of associated digital brands such as Peloton and Strava.

Sources: Instagram data (collected Feb 2021- July 2021)
Nearly two years ago, the NBA partnered with blockchain company Dapper Labs to create a platform called NBA Top Shot, allowing fans to purchase digitised collectible items. Top Shot has now been able to tap into the recent explosion of NFTs (non-fungible tokens), which allow people to bid for exclusive digital souvenirs – in this case, NBA highlights. Sport has traditionally thrived off physical collectibles like shirts and playing cards, but now, thanks to a pandemic where people haven’t been able to support their teams in person, NFTs are a novel way to experience and own sports content.

Fans can collect and trade Top Shot ‘Moments’, akin to purchasing a pack of trading cards. The difference is NFTs are of limited supply. This means that the key appeal for fans is in the scarcity effect, which, like other forms of art, has the ability to drive prices sky high. NFTs are currently firmly in the premium space as a result.

Of course, this behaviour would only be possible with a willing community. The rise in cryptocurrencies, gaming and virtual real estate has normalised digital ownership, intersecting with a growing number of NBA fans keen to own something special. In the beta phase, Top Shot fostered a Discord community for half a million eager NBA fans to discuss all things basketball and collectibles.

But it’s not all stuck in the ether. The future could see NFTs like this merge with physical experiences. The Golden State Warriors, for example, announced that fans can ‘christen’ their digital items at live sports events; and a physically signed LeBron James rookie card recently sold for $5.2 million, showing there’s an appetite for sports fan ownership that exists in both the physical and virtual worlds.
1. Future Fan Experiences
The rise in new and immersive forms of sport consumption via futuristic technologies

2. Fan Values First
Empowered supporters publically voicing their opinions, calling for positive changes in the industry
Despite fans finally getting back into stadiums, the revenue loss from months of games played behind closed doors hasn’t fully kicked in yet. There are still lots of rules and regulations to abide by.

Clubs have been forced to find new ways for fans to engage with their content. Diversified broadcasting rights, free social media snippets and round-the-clock streaming has meant clubs are now on the same battlefield as the likes of Facebook, Netflix and eSports.

Those that have adapted are reaping the rewards. 56 percent who enjoyed a tech experience from their club say they would also attend events in person, and 60 percent said they would stream more content online. American Express, for example, entertained fans with a VR experience where they could play against Andy Murray, while NFL team Dallas Cowboys let fans take selfies with players at the A&T stadium through an AR-powered app.

Verizon have been leading the attack in this space. Through their 5G, fans were able to watch the Superbowl via seven different camera angles, complete with AR overlays showing stats on the players. They even created a stadium in Fortnite, giving fans an entirely new way of watching the game. In physical stadiums, they’re also helping clubs innovate with technology that can streamline screening and health testing, reduce congestion and provide fans with safe IRL experiences.

**Future Fan Experiences**

**Next Steps**

Overall, technology is set to offer new revenue streams for clubs and preserve the stadium experience for decades to come: 69 percent of fans report the use of emerging technologies has enhanced their viewing experience both inside and outside the stadium. Sports brands need to act fast on this or risk losing out to the ever-dominant tech industry.
Future Fan Experiences

In The Data

Best Recent Tech Innovations in Sports Broadcasting

- 53% regularly watch sport on a PC or laptop
- 60% believe technology has made watching sport a more sociable experience
- 74% believe technology has made sport more accessible to a larger audience
- 41% watch sport on their smartphones

Source: BT Sport survey of 2,000 sport fans across the UK

Emergent Fan Experiences

(Conversations on Twitter and Forums, last 365 days % change)

- Drone Cams +15%
- Gaming Integrations +15%
- Augmented Reality Enhancements +6%
- 4K Televisison +10%
- NFTS +3.7%
- 5G Stadiums +6%

Drone Cams
Gaming Integrations
Augmented Reality Enhancements
4K Televisison
NFTS
5G Stadiums
Future Fan Experiences

WHAT ARE PEOPLE SAYING?

Brands are experimenting with new ways to immerse fans in sport. The virtual Verizon 5G festival drove a lot of noise among gamers and sports fans (where there is considerable audience overlap), and Sky Sports introduced Sky Worlds for the north London derby. While a lot of conversation is speculative, there are many examples of the democratising effects brought on by these new technologies, such as providing unique experiences for those with disabilities or sustaining smaller clubs with virtual tickets – as was the case with Marine FC when they played Spurs.

SO WHAT?

Traditional symbols and methods of supporting your team – such as going to the stadium and buying physical merchandise – are no longer as important as they once were. Instead, people are turning to tech for convenient and exciting new ways to follow their sport. Brands should think about which supporters these people are, such as international fans or Gen Z, and tailor immersive experiences to fit them.
Fan Values First

Fan communities used to be defined by one thing: their shared support. Now, sports fandom – and fandom in general – is built around cultural values beyond the sport itself. Whether it’s a desire for accountability, transparency, or greater representation, fans are now banding together around shared causes, calling on clubs and athletes to use their power for good.

The uproar over the European Super League and the more recent outrage at racial abuse online of footballers during the Euros has finally forced clubs to take a firmer stand. Fans now expect their morals to be met. While players of the past were not expected to comment on causes outside their sport – Michael Jordan notoriously refused to endorse black Democrat Harvey Gantt in the 1990 elections – today it’s considered irresponsible not to.

In the UK, we’ve seen the likes of Liverpool captain Jordan Henderson calling to condemn more racist abuse in public, and the huge impact that footballer Marcus Rashford has had on the free school meals campaign. Elsewhere, Japanese tennis star Naomi Osaka refused to speak to the press at the French Open because of mental health concerns, while the NBA’s Kyrie Irving faced fines for breaching media protocols for misrepresentation: “I’ve had enough of someone else’s propaganda” he remarked.

Such acts are largely lauded by supporters and fan activists. More than ever we’re aware of how clubs operate and the corruption that runs through governing bodies; so when professional athletes act out of altruism and speak on social issues, the impact is amplified.

**NEXT STEPS**

Thanks to social media, fans can share information and mobilise, take issues into their own hands and vocalise what matters. Sporting institutions need to prioritise the voice of the fans, and make smart appointments – such as heads of diversity or culture – to ensure their businesses are run fairly and in line with their fans’ values.
Fan Values First

IN THE DATA

Race has dominated fan conversations about sport over the last 365 days. The NBA, MBL, and NFL have seen this with particular prominence, where a politically charged fanbase has debated the emergence of new inclusive protocols. The issue of race has also come to dominate conversations around the English Premier League. This year saw the emergence of new conversations around LGBTQ rights in sports, too, with important debates arising at the Olympics on the presence of trans athletes. Mental health awareness also grew over this period, particularly in the French and Australian Opens, where conversation focussed on the media, press conferences and the rights of athletes to certain levels of privacy off-screen.

SO WHAT?

Each sport, league and fan community has a unique set of struggles to contend with. Brands seeking to unlock new opportunities in sports fandom must first fully appreciate the nuance of these struggles and the complexity of internal fan dynamics.

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<th>TOP SPORTS COMPETITIONS ASSOCIATED WITH FAN VALUES (BROKEN DOWN BY TOPIC %)</th>
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<td>NFL</td>
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HUMAN RIGHTS +2.4%
GENDER +4.7%
LBGTO+ +12%
SUSTAINABILITY +1.4%
MENTAL HEALTH +19.6%
CLUB FINANCING +3.5%
RACISM +56.5%
Fan Values First

WHAT ARE PEOPLE SAYING?

Social media platforms have been a focal point for discussion around fan values and protests. Issues of responsibility and social roles are dominant as individuals and institutions discuss and react to topics including race, human rights and economic fairness. Hashtags are used to crack algorithms and drive interest, while debates are loudly argued on both sides, highlighting the polarisation of fans across different sports, too.

SO WHAT?

Sports communities and fan groups have a louder voice than ever and are able to easily attract like-minded others. On public forums such as Twitter, debates are allowed to run freely, creating issues of misrepresentation and credibility. Brands need to be firm and assertive in these spaces, clearly outlining their position and not pander to those spreading discriminatory messages. While this may ostracise some supporters, the positive snowball effect will attract new fans and ultimately build a stronger brand.
How We Worked It Out

**METHODOLOGY**

Our Culture At Scale method uses unstructured data taken from forums, search, social, review sites, client sales and behavioural sets to uncover cultural insights. Merging data sources and using AI and machine learning for speed of analysis, we reach provocative outcomes to evidence trends and support innovation.

While each report covers a four-six month period, we often go back further to add more historical context to data points and cultural developments.

Each social platform has different data privacy and sharing conditions, which means the datasets we have access to are incredibly varied. Twitter, for example, allows full access to conversation data, while Instagram and Facebook are more private with heavy restrictions. Additionally, by nature of Twitter’s popularity in the US and other Western markets, the data is likely skewed towards brands and campaigns present in these markets. In the creation of each report, we always endeavour to take these nuances into consideration and provide as truthful a reflection of the conversations as possible.

Culture At Scale fits within our Crowd Signs team (see right) – our specialism focussed on unlocking future potential, where we also house semiotics, trends expertise and our KIN network. These interlinking methods help give us a head start on what the interesting category developments are and how they relate to broader cultural shifts.
Culture At Scale at Crowd DNA

Culture At Scale is a powerful aspect of how Crowd DNA pinpoints and tracks trends. Supported by the advanced NLP, AI and machine learning capabilities of strat7.ai, we tap into the sheer size and incredible pace of the online conversation, presenting future scenarios and defining credible opportunities.

Culture At Scale is called on by brands across a broad set of categories – media, tech, apparel, alcohol, retail, finance and beyond. It combines the creativity and intelligence of our analysis and consultancy with the trustworthiness of significant data sets.

If you’d like to discuss how our Culture At Scale offering could help your business, please get in touch for more information - Jo Hatch / j.hatch@crowdDNA.com.