

Crowd
SIGNALS

Sports Fandom & Activewear

Using our Crowd Signals Platform to find cultural
change and opportunities from unstructured data

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A person is climbing a rock wall with various colorful holds. The climber is wearing a grey long-sleeved shirt, green pants, and a climbing harness. The wall is white with many small black dots and larger colorful holds in shades of green, red, orange, and pink. The climber is positioned in the center-right of the frame, reaching up with their right arm to grab a pink hold. Their left leg is extended downwards, and their right leg is bent. The background is a plain white wall.

Sports Fandom & Activewear

In this fourth issue, we used the Crowd DNA Signals Platform to analyse trends within the sports category, focusing on activewear and fandom.

In the first chapter we look at how sports clothes empower resistance, and how activewear can message inclusivity, real body diversity and taking back control of our bodies.

The second chapter addresses how being a fan is about standing up for rights, and using various platforms to drive radical change.

Crowd Signals Platform

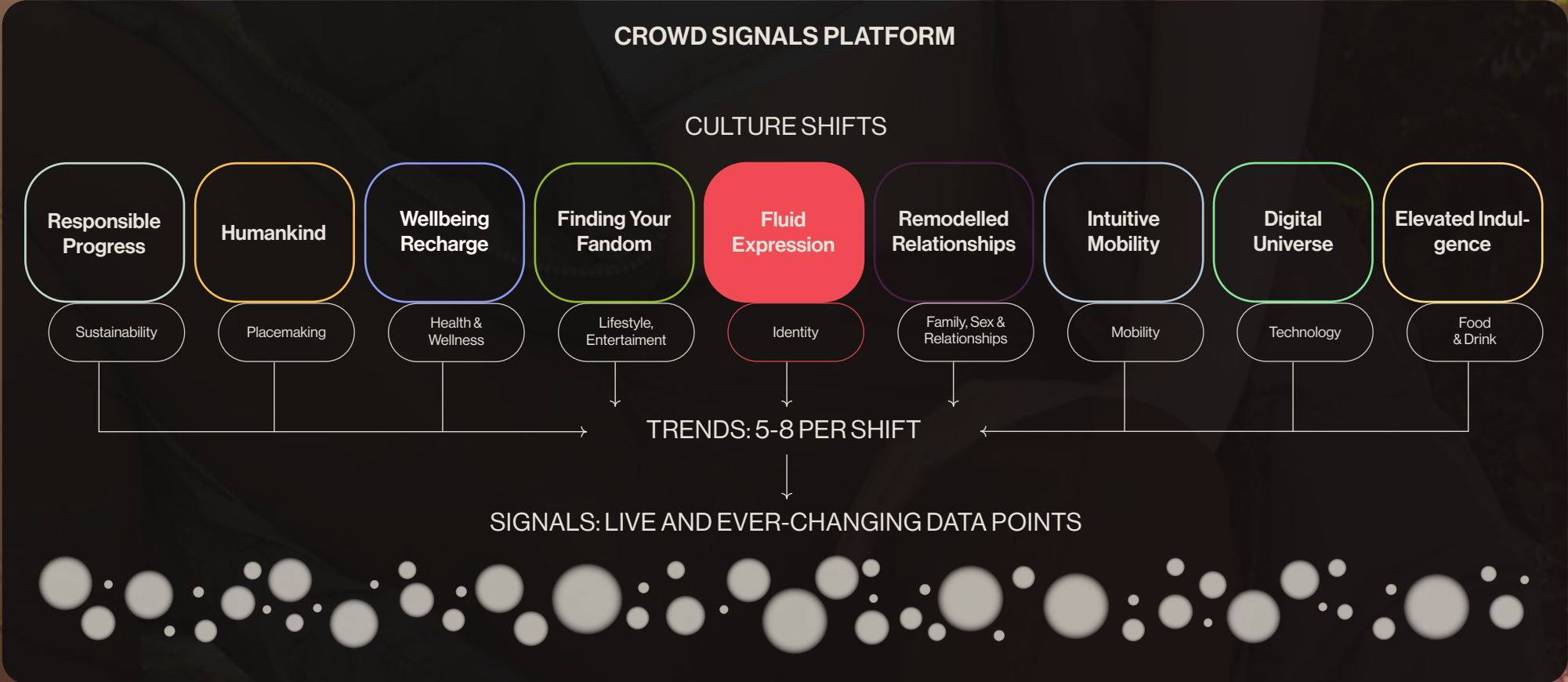
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This report is based on our Crowd Signals Platform. It uses advanced NLP, AI and machine learning capabilities to search social posts, forums, search engines, review sites, client sales and behavioural sets.

Data sourced April - December, 2023

Chapter One: Activewear

Culture Shift → Fluid Expression
The Trend → Mosaic Me



Activewear

As we welcome in 2024, sports looks different... from ads featuring models with visible cellulite to activewear brands finding alternatives to passé ideas of exercise (of the hot bod to show off on socials). This chapter reports on how activewear is now for everyday movement (a gentle hike not a hard bench press), emotional wellness and inclusivity.



The Crowd Signals data tells us about:

- Gym wear as everyday wear
- Playful dressing of sports brands
- Pairing of wellbeing and activewear
- Activewear trends on TikTok

Activewear With Ease

Many of us want to approach exercise with ease. To free fitness from performance. And this shows up in how we wear activewear around the clock without it feeling performative - eg activewear linked to #streetwear more than #activewear and worn in urban or natural settings. Or activewear not for the gym but for pottering around in as an 'Outfit Of The Day'. But some things stay the same: it remains very popular for mirror selfies...

Heading Outdoors

Image analysis of sports brands (Source: 100 randomised images, Instagram)



56% Mirror Selfies and Gyms



21% Urban Settings



17% Natural Surroundings

All-Day Performance

Caption analysis for athleisure

13%

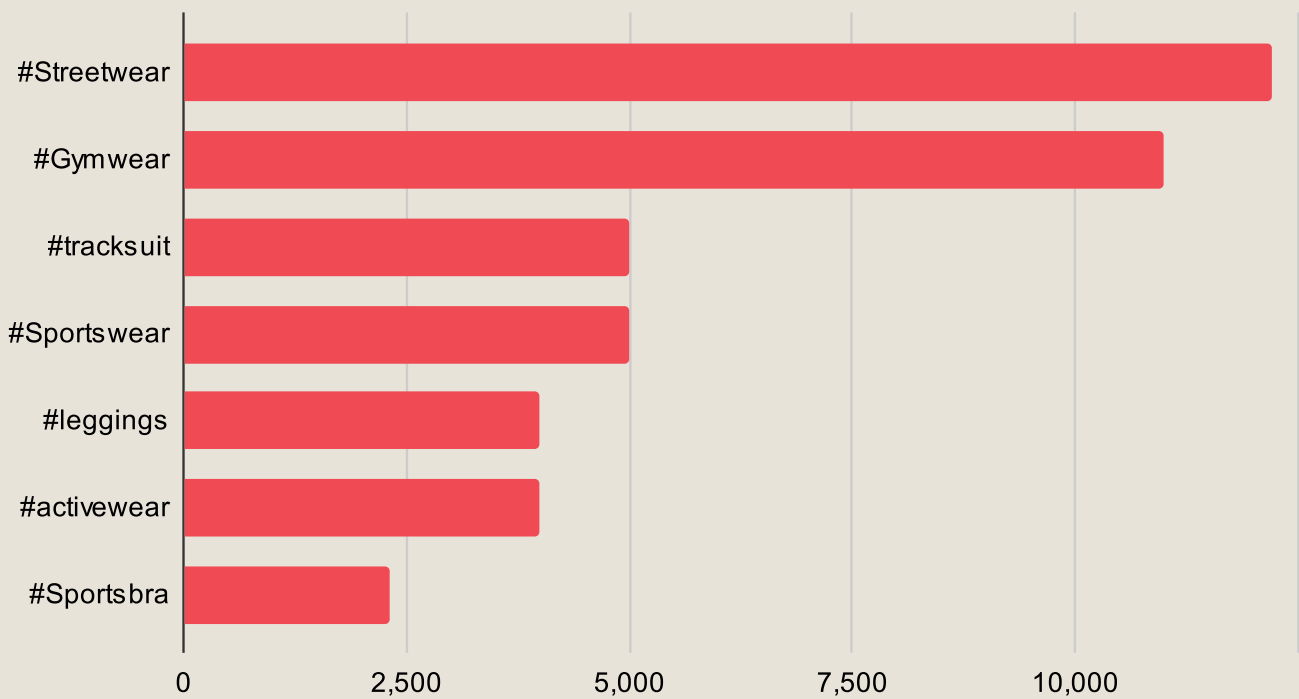
of all mentions of athleisure by content creators on Instagram use the caption 'OOTD' (outfit of the day)

+7%

in the last six months

No. 1 Streetwear

Top TikTok activewear hashtags (last 12 months, total posts)

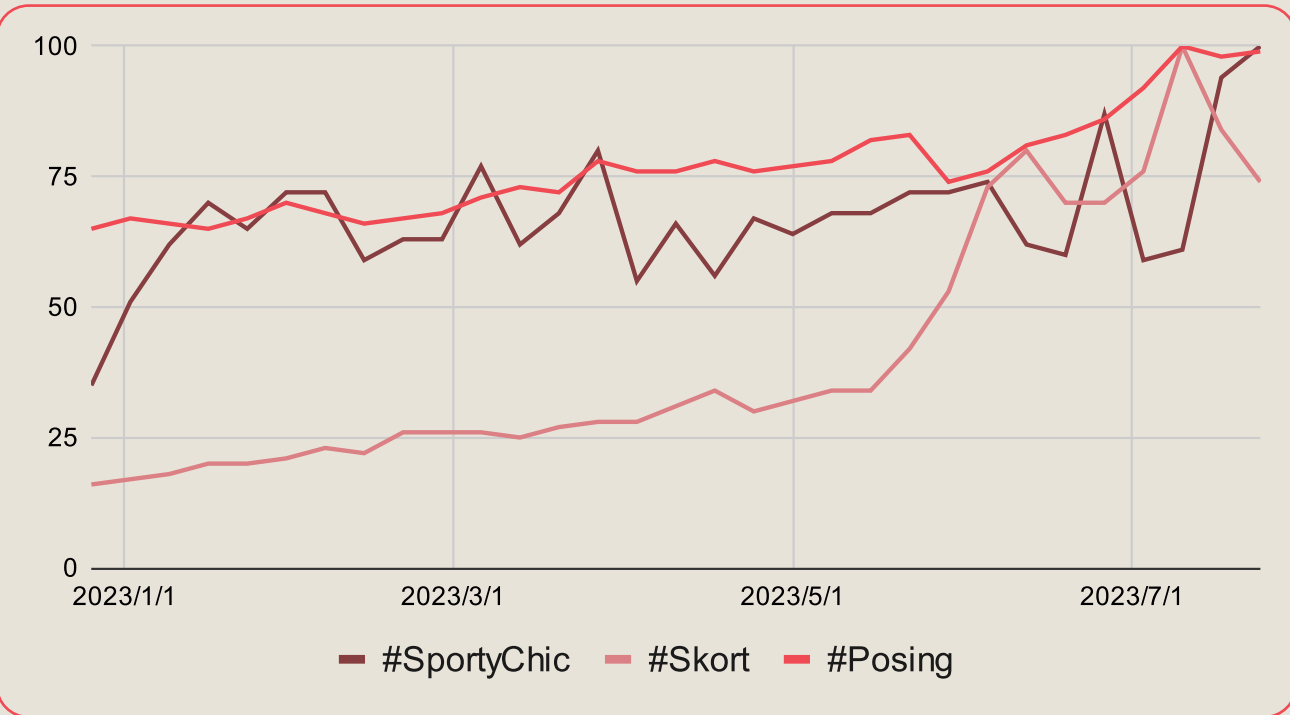


Creative And Playful Styling Of Activewear

Other signs of physical activity becoming more like everyday play can be seen in an increase of TikTok mentions for activewear brands in wearing occasions like GRWMs ('Get Ready With Me') or 'What's in my bag?'. Activewear is also creative inspiration for new trends on the platform, like #Posing or #SportyChic.

3 TikTok Activewear Trends

Top TikTok activewear Hashtags



+216%

Mentions around the activewear brands and wearing occasions (eg GRWM, OOTD) on TikTok grew by 216% in the past 6 months

Activewear Styling



"POV: You did a dirt bulk for 5 months #posing"



"Sporty chic #ootd #sporty"



"Whats your favorite... 1 or 2? #fyp #skort #zara"

Activewear To Support Your Mental PB

There is a move away from an exercise ideology that focuses on just looking good or disciplining your body. People rebel against this by wearing their polka dot skort in the gym, and being a bit idle while there. Activewear isn't just to make you feel good about your looks and lifestyle, but be part of feeling good about your mental well-being.

Feeling Good In Activewear

Top reasons people exercise today:

- Reduce stress (43%)
- Feel better mentally (43%)
- Look better physically (39%)

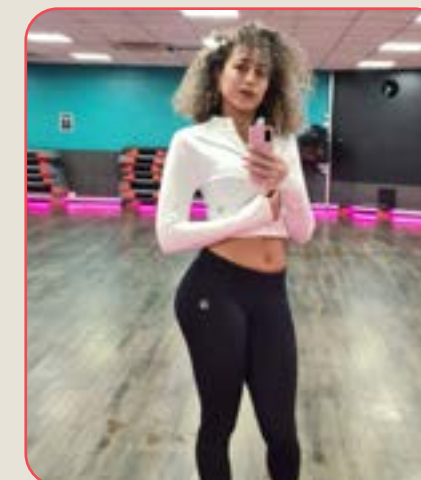
(Source: New Motivations to Exercise, US News & World Report, June 2023)



"There are so many reasons besides aesthetics that you should exercise & strength train"



"Getting into fitness helped me during one of the toughest time in my life. Investing in YOU is the best investment you make"

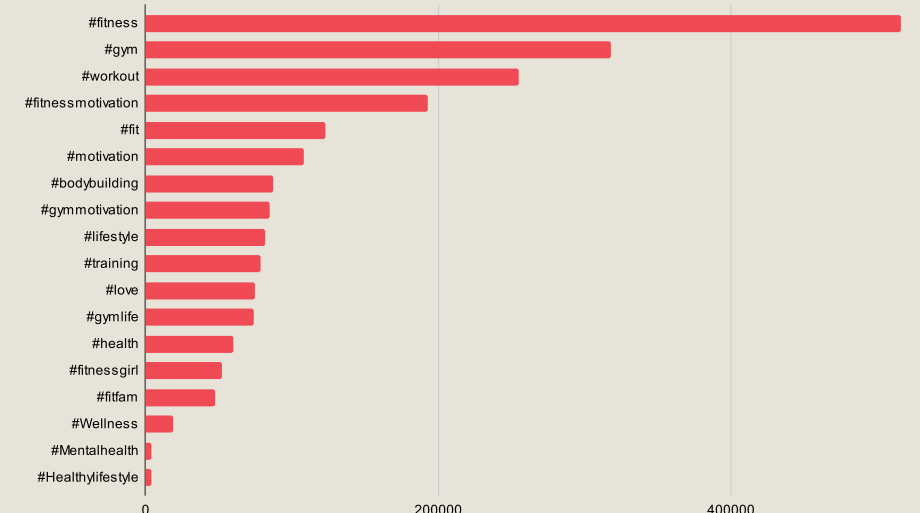


"Gym is My Therapy What is yours?"

- Releases endorphins (feel good hormones) boost confidence
- Change of focus for mind
- Boost energy
- Improves overall health & physical well being"

New Motivations

Activewear is now not just linked to the gym but more emotional states, eg #love, #health and #gymmotivation



"POV: you're training for your mental health and pushing yourself because you know it clears your mind"



"#gymmotivation #workout #workoutmotivation #gymshark"



"Correct Attire for the correct 'Dedicated' attitude #dedication"

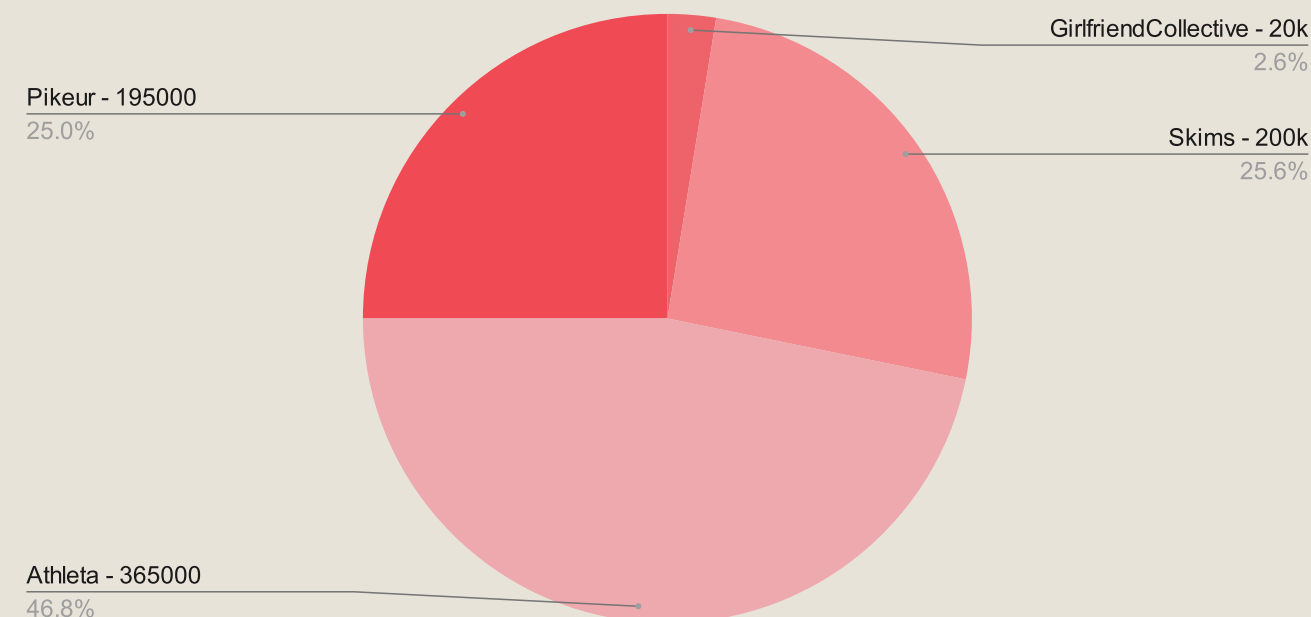
Activewear & Brand Recognition On Social Media

On social media we see established brands like Puma, Nike and adidas still have a strong presence. While it's the newer brands like Sims, Pikeur and Athleta who are most recognised in the athleisure wear market (high-performance sportswear originally designed for workouts but now worn everywhere).

No. 1 Athleisure Brand

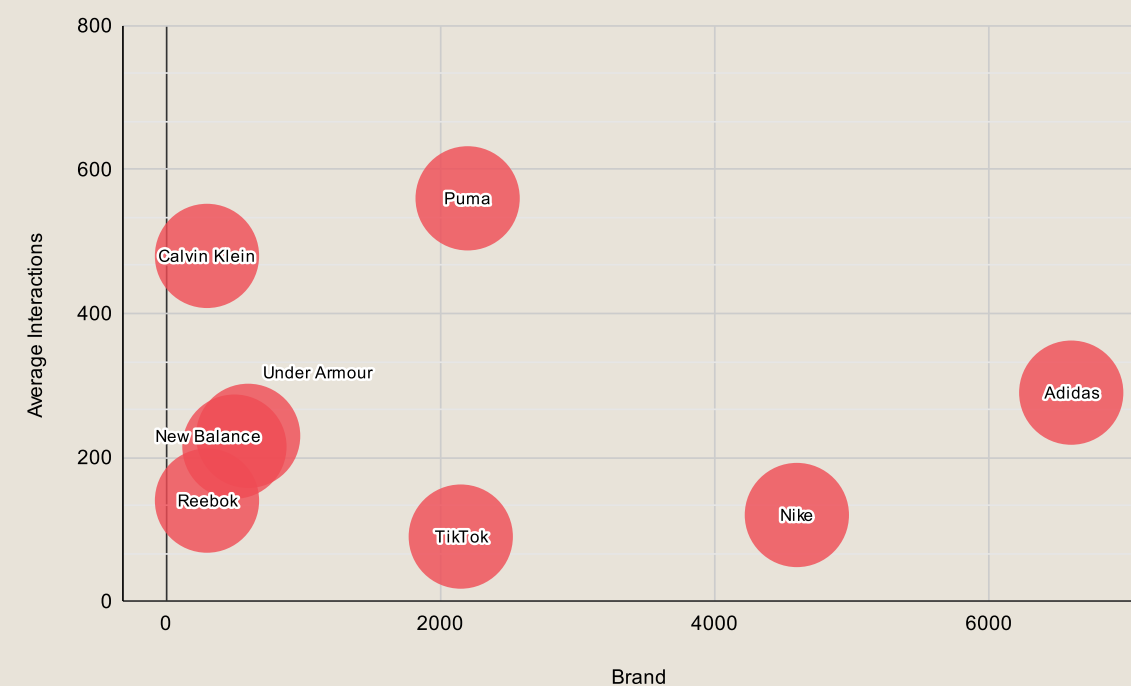
Athleta dominates as the most hashtag volume for athleisure brands

Athleisure Brands By Hashtag Volume



Top 10 Logos

In sportswear by volume and interaction (Instagram)



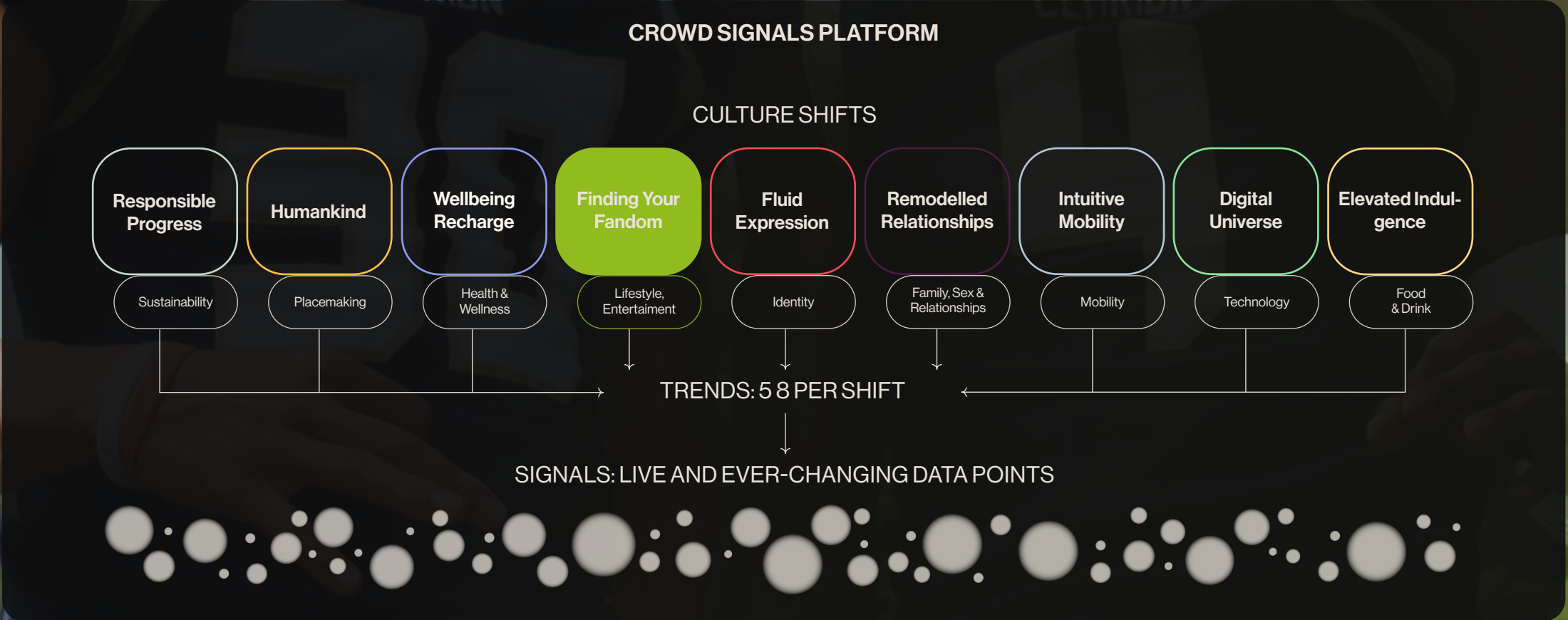
Top Three Logos:

1. Puma
2. Calvin Klein
3. adidas

Traditional brands still feature heavily but athleisure wear brands (eg Calvin Klein on TikTok) are driving a lot of interactions.

Chapter Two: Sports Fandom

Culture Shift → Finding your Fandom
The Trend → Sporting Equality



Sports Fandom

Sports is a prime cultural battleground for every hot-button issue... it's where fans and sport activists hash out views on race, religion, sexuality, the role of the police and mobilise in real time. This chapter reports on how fans are trying to gain a better understanding of social and political issues, and embracing activism, with new fanbases, and attitudes to diversity.



The data tells us about:

- Female fandom's impact on inclusivity and body positivity
- What e-sports players care about
- Fans and global activism
- Brands staying relevant as fandom conventions change

Fans And Athletes Speak Out

The sports world tackles thorny issues. We can see this with the acceleration of discussion about trans gender rights, plus powerful public activism (eg tennis player Naomi Osaka talking about mental health, intersectional and race issues) and how it spreads the word (eg with the climate protests at the World Snooker Championship, 2023).

Athlete Power

Star athletes are using their influence and platforms to have their voices heard when it comes to social issues.



Climate Change

The UK has had an unprecedented number of 'guerilla' tactics and protests at major sporting events – pictured, Just Stop Oil protest at World Snooker Championships.

"The cutting edge of the fossil fuel issue... snooker..." YouTube comment

"The Just Stop Oil strategy: 'If we make enough people utterly despise us they will be sympathetic to our cause!'" YouTube comment



Transgender Athletes

Basketball Australia rules transgender athlete Lexi Rodgers ineligible.

+72% Conversation around transgender athletes has increased by 72% across key social media platforms in the last year (Twitter, YouTube, Instagram)



Football Protestors

Activism on the pitch took hold in the 2022 after Qatar was dubbed the World Cup of politics and protest. This summer, anti- Anti-Putin protests interrupted the Women's World Cup final.



Naomi Osaka promoting how to preserve mental health (eg her Time cover 'It's OK Not To Be OK' and her children's book The Way Champs Play) as well as speaking in public about issues like BLM.

"Really love that you show all nationalities as well as representation of a young Muslim girl. You are such a role model!!! I cannot wait to show my daughter and order a book!"

"Congratulations Naomi Love this!!! Thank you for including a hijabi in your book!! It means a lot!!!"

"Naomi thank you for knowing how beautiful and royal your roots are."

E-Sports: Caring About Diversity

The e-sport fanbase is beginning to address the misogyny, anti-LGBTQ+, and toxic harassment that takes place in online gaming. The data shows there’s a long way to go: but also that players are aware of a need for a more genuine, more supportive community. With new guidelines from gaming organisations and brands, e-sports will broaden in appeal to a wider, more diverse audience.

What Issues Matter

The growth of key topics YoY (Twitter, Reddit, YouTube)

+28%

Gender and Sexism

Better female representation is the most important discussion, but sexism and misogyny still prevails online- particularly in anonymous forum spaces such as Reddit and 4chan

+10%

Ageism

Ageism is rife in the industry as a common misconception that younger players have better reflexes

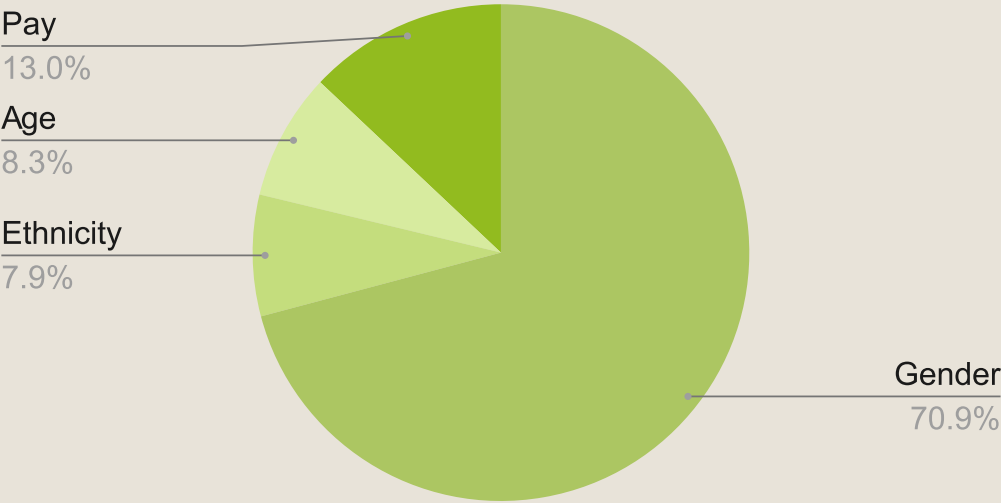
+48%

Pay

The fees for e-sports players have shot up dramatically in recent years

Issues Discussed Around E-Sports

June 2022 - June 2023 (YouTube)



+8%

Ethnicity

Many teams are built of diverse players, but racism still prevails and BAME individuals are under-represented and face toxicity. Orgs such as #blackgirlgamers seek to build more inclusive environments

Gender & Sexism:

“I loled at the part where she says there’s too much talking on all male teams. She is really hustling to be able to be in e-sports. I wish her the best of luck and success.”

“This is the reason I want only female esports tournaments to push more women into esports or gaming in general. But always when I suggest that I’m a misogynist.” (Reddit)

Ageism:

“You on the other hand have gotten older with worsening reflexes. This is why most esports celebrities are 18-25.”

(Reddit Response) “The biggest reason there aren’t older pro players is because of this exact myth and ageism, and the fact that pro gaming is a brutal field where you need to keep grinding and as people get older they just don’t want to sacrifice their lives instead of having meaningful relationship and kids.”

Growing Female Fandom

As well as e-sports, fandom is being taken in a new direction by the support and enthusiasm for women in sport at all levels. Our data spotlights the huge growth in interest in female sports. But there's a lot of catching up to do. It's not that women have never been in this space, but that they are suddenly getting the recognition, and brands need to get to know this female fan.

Growth In Twitter Mentions
2022-2023 Compared
to 2021-2022:

+126% Women's National
Basketball League (US)

+58% Women's Super
League (UK)

+31% Ladies Professional
Golf Association (US)

+111% Growth In discussion of
women's sports leagues,
2022, Twitter

41.5% A YouGov study found
41.5% of respondents in the
UK now identify as fans of
women's sport

1.55m The Barclays Women's
Super League is now the
most followed women's
professional football league
in the world



Female Fans Enforcing Positive Messages

Female fans on Instagram, TikTok, and Twitter are not only discussing issues (as we see happening in e-sports), but are creating a new blueprint for fandom built around openness, inclusivity and intimacy between the sports star and fan.



Champion Inclusivity

World champion Kubra Dagli fighting to promote hijab wearing in sport.



Champion Body Positivity

Olympian Kadeena Cox on TikTok engages in her MS story.



glee roleplay and edits
your my sporting inspiration

2022-11-28 Reply

Champion Joy!

From ageless exercise to smiley fandom, female fans are putting positivity into sports experience.



"@trainwithjoan Inspiring! I'm going to try and do this daily like you said and see what happens."

"I'm going to be like YOU Joan! You are SO AMAZING AND AWESOME! Such an inspiration to many."



"England's European championship win made women's sport more visible."

"Win/lose/draw, still smiles on the fan's faces."

"Classy fans"

So If Female Fans Are Where The Action Is, What Brands Are Winning Their Attention?

Looking at logo data, we can see in activewear that adidas has a strong overall association with women’s sport, predominantly driven by #football sponsorships and the ever-growing Women’s Super League clubs, such as Arsenal. Meanwhile, Samsung is winning for where to watch women’s sport on its streaming service.



@girlsontheball

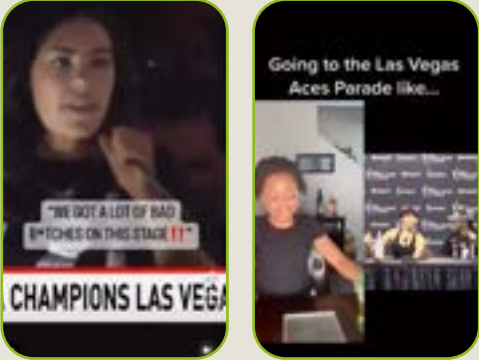
“Big congrats to the #BarclaysWSL players and Lionesses (past and present) who made the 2022 FIFAPRO #World11 shortlist

#woso #wofo #womensfootball”

@bballcrazy

“I just wanna let you know... that every time I step on the court I'm gonna be a dog for every single one of you” - Kelsey Plum

#BballCrazy #Wnba
#kelseyplum #basketball



@indo.esports

“Match Schedule for the second week of “The Last Dance” Woman Star League Season 5 which will be held on the day from 14.30 to 20.50, which will close with matches of queens and former queens of the Woman Star League!”

Top 10 Logos & Keywords In Volume

(Instagram, image & hashtag analysis total posts, rounded up)

	#football	#sport	#women	#soccer	#WSL	#basketball	#WNBA	#NBA
2k games	85	80	40	40	40	80	80	85
NFL	180	90	199	80	60	60	80	80
ESPN	70	70	70	70	30	80	90	80
Samsung	70	70	70	70	230	40	70	65
Puma	105	95	80	70	70	70	70	70
Twitter	70	70	70	60	60	70	75	70
NBA	75	75	70	70	60	200	220	300
Nike	100	120	140	100	65	80	80	60
TikTok	150	100	80	100	80	180	230	180
Adidas	400	380	360	300	200	150	100	50

No. 1
adidas
#football

No. 1
TikTok
#WNBA

No. 1
Samsung
#WSL

Thanks for reading.

On your marks, get set, and go...

Contact us to find out more about how our Crowd Signals platform can help client challenges. Our AI powered and bespoke offering can be tailored to help uncover culture shifts, trends and future opportunities from unstructured data.

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Crowd SIGNALS

Finding cultural change and future opportunities from unstructured data

Crowd Signals is a powerful new addition to how Crowd DNA pinpoints and tracks trends, unlocking future opportunities at scale and at speed.

Supported by the advanced NLP, AI and machine learning capabilities of strat7.ai, Crowd Signals:

- Pinpoints prominent cultural shifts across the world
- Spots emerging trends and visualises their trajectory
- Quantifies signals and tracks their rate of change
- Unpacks visual codes and the linguistic evolution behind signals
- Define future scenarios and viable opportunity spaces
- Future proofs brands across multiple categories

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How we work with clients

One-off explorations or ongoing programmes - access Signals ad hoc at a moment in time or on a continuous, quarterly or monthly basis.

Standard reporting or bespoke consultancy - tap into ready-made reports and recommendations, or opt for custom data enrichment calling on further trends consultancy, semiotics and KIN – our 1,000+ global network of experts, creators and connectors.

Strategic outcomes

Futures & Trends
*Culturally charged forecasting and
scenario planning*

Brand Strategy
*Positioning and brand recommendations
rooted in cultural signals*

Comms & Activations
*Culturally nuanced and impactful
marketing executions*

Innovation
*Opportunity areas for culturally relevant,
future proofed innovation*

Thanks for reading.

Crowd DNA is a cultural insights and strategy consultancy with offices in London, Amsterdam, New York, Singapore, Sydney, Stockholm, and Los Angeles.

Formed in 2008, operating in 70+ markets, we bring together trends specialists, researchers, strategists, data analysts, writers, designers and film-makers, creating culturally charged commercial advantage for the world's most exciting brands.