

THINK FORWARD

SPORTS EDITION

2023

Emergent trends in digital sports culture.

One of the major focuses for us as an agency is to dive into arguably the biggest existential crisis facing sport currently.

Why do the next generations seem to be switching off from sport?

Time after time we see reports of Gen Z's dwindling interest in sport, and time after time we see sport reacting in negative ways.

We've repeatedly seen sporting bodies and institutions attempting to change the very nature of sport itself. Whether it's cricket constantly adding new formats, the European Super League which collapsed in on itself, or new start ups like Rugby X.

Whilst we as an agency do believe that sport can - and often should - look for ways to enhance the product, changing the fundamentals of the sport itself should always be a last resort.

It's a risky strategy. You potentially alienate existing audiences who may be scared of change or modernisation, as well as adding layers of complexity where there doesn't need to be. Crucially it adds to a feeling we have of the head being disconnected from the body of sport.

That is, that the people running sport have become disconnected from the people playing or enjoying sport itself - with the European Super League being the most obvious example of this.

Sport is best when it's simple and focuses on the core reasons of why people love it in the first place.

But too often sport seems to be speaking a different language to the audience.

So we've been taking a closer look some of the evolving trends within Gen Z culture, and digital culture more widely, so that we can start to decode, translate and understand what is REALLY going on.

And what we've found is that when you dig deeper, you start to uncover some really interesting cultural advancements which on the surface can appear seismic and existential, but are genuinely inspiring.

We believe that this changing landscape provides amazing creative opportunities for brands, sponsors and rights holders to totally change how they approach culture, communities and marketing.

From subreddits to substacks, from goblin mode to algorithmic anxiety, from Web 3, DAOs and AI through to discord servers, live streams, and everything in between, let's lift up the curtain and take a look inside.



TREND 1. TEXTURED DISCOVERY

How people discover and explore sports content is changing.

Throughout time, sport has been something that is normally inherited through family or picked up through participation, but social is creating new avenues into sport through textured discovery.

Behavioural Change

Coinciding with this is a shift in online search. In July we heard an SVP at Google report that almost;

"40% of young people are going to TikTok or Instagram for discovery"

rather than Google search.

As the internet becomes ever more saturated, curation is being prioritised over simple information gathering. Gen Z are turning to social media to discover sports content in new, fascinating ways, from crowdsourcing to searching by feeling or emotion.

In Culture

Disillusionment with old modes of search:

Search results once felt magical, or at least intelligent – now, with greater social awareness of algorithms, SEO, and sponsored ads, there's a sense that what we see online is limiting. There's even a whole branch of stress – 'algorithmic anxiety' – describing the fear that online recommendations are dulling our individual tastes.

INFINITE SCROLL

THE AGE OF ALGORITHMIC ANXIETY

Interacting online today means being besieged by system-generated recommendations. Do we want what the machines tell us we want?

By Kyle Chayka
July 25, 2022

On Platforms

Crowdsourced Guidance on Social:

As official search results steadily lose their sheen, social platforms have become groundswells of discovery-friendly content.

The way people explore the internet and discover sports and sports content is evolving.

From the honest, unbranded reviews on Reddit to an explosion in UGC 'Best of...' lists. From live streams, duets, and stitching, to other 'reaction content' such as Krusty Vlogs "American Football Players react to best cricket catches", we are seeing crowdsourced guidance content receive views in the hundreds of thousands.

While sport used to be consumed through official channels/highlight packages, we're seeing crowdsourced content finding greater resonance with casual sports fans.

Digital fan communities are becoming the entry point into sport.

Rather than participating or inheriting sport through family or IRL friends, digital fan communities are becoming key discovery points into sport. /r/FormulaDank epitomises this. A page made up of user generated content from Formula1 fans, the audience are converted to formula1 thanks to the culture of the Reddit community of Formula Dank. It's the memes, humour and discourse that drives fandom here, rather than the sport itself. This makes sport more inclusive and accessible for young fans, whose entry point is digital fan culture that surrounds the sport. It's an internet-first way into sports fandom.



Gen Z are fighting against the predictability of algorithmic content.

People are beginning to resist algorithms, and how they choose the one vision of the online world we see. Instead, users want to peer beyond the curtain of their own feeds and 'For You Pages', in search of a more random and unforeseen glimpse of what the web has to offer.

E.g. the 'sorry wrong fyp' trend, where sellers on TikTok played off the idea that the algorithm hides content from you. **62% of people want streaming platforms to recommend more unpopular content... even at the risk they may not like it.**

TREND 1. TEXTURED DISCOVERY

Sports fans want to search by 'feeling'.

Rather than a clear or specific search term, people are hinging their discovery journeys around a mood, aesthetic of feeling. The genesis of this was GIPHY, the search engine which allows people to find GIFs based on the emotion conveyed in the image.

When it comes to sport, the rise of 'NoContext' or 'Outofcontext' sport accounts is letting people enjoy sports content purely on the feeling it produces. Accounts like Football Pictures That Go Hard (an account that simply tweets miscellaneous photos of football legends: 661.3k followers) or GrassrootGoals (an account that simply tweets great goals from grassroots football: 203k followers) aren't based on narratives but just giving people content that engenders pure enjoyment. Beyond Twitter, we see people searching by feeling on platforms like TikTok, where the hashtag #fitnessmotivation has 18.7bn views

KEY BRAND TAKEOUTS

There's more value in brands that make search feel collaborative and surprising.

A good example of this is the work the MLS did with Australian Tik Tok Stars Shepmates to not only surprise their existing audience, but to bring in potential new audiences. By making new and unexpected combinations, consumers are being rewarded for their attention.

The way people explore the internet and discover sports and sports content is evolving.

Or you can learn from Spotify which lets people collaboratively discover music: launching its 'blend mixes' letting people peer outside of their own algo-recommended filter bubble, being guided by their music partner's taste.



TREND 2. COLLAPSING NARRATIVES

To survive the modern attention economy, storytelling on social media is mutating. Once a formulaic art – beginning, middle, end – stories are no longer progressing through a full narrative arc, nor do they play out start-to-finish in one place. Instead, they’re collapsing and starting mid-narrative, or expanding and becoming scattered across platforms.

There's no better example of this than Popeye's most recent sponsored athlete, Collin Deunerst. Known as 'the Popeye's kid' thanks to a 2013 viral Vine meme taking place in a Popeye's which he was the star of, the fast food chain announced a sponsorship with him 10 years later after he won his state's football championships.



The announcement from Popeye's sparked engagements in the thousands with the brand even creating billboards off the back of the sponsorship.

What's driving it?

In Culture

Powerful fandoms: As content comes to depend less and less on context, users who are already clued up on assorted stories and subcultures have a natural advantage. With algorithms shifting the focus to shared interests, fandoms are becoming de facto tour guides, shepherding people along and across platforms with comments.

On Platforms

Death of the social graph: the success of TikTok's algorithm – serving people content purely based on their interests, rather than their social connections – has inspired a seismic shift on platforms. Our online experience is guided less by peer-based recommendations, leaving us freer to move across platforms, beyond those populated by family and friends.

Storytelling is no longer linear or following established structures.

Behavioural Change

Today's popular culture is a continuation of a pre-existing story.

Stories aren't starting from scratch; they're beginning in the middle of the narrative. The rise of retro throwback kits is testament to this, with teams across sports regularly dropping jerseys that build off old narratives instead of starting anew, similar to how sequels and reboots are taking up a bigger slice of the pie of top-grossing culture – despite an influx of new creators. There's even a whole aesthetic based on this vintage kit look that took flight in 2022 called #BlokeCore, which has 82.7m views on TikTok.

Jack Grealish's celebration, inspired by Finlay – a child with Cerebral Palsy, is also indicative of this shift towards popular culture being a continuation of a pre-existing story.



The celebration that Grealish did against Iran at the World Cup came from a YouTube video where Grealish met Finlay, a Manchester City fan, who asked him to perform a special celebration for him. However, many people only found out about this story midway through, when Grealish performed the celebration at the World Cup. It became one of the most talked about moments at the World Cup, generating plenty of content and news headlines across the British press.

Conversation online doesn't play out start to finish on a single platform

It's become common practice to move fluidly between platforms, with our experience of content developing across these spaces – like when clips from Twitch streams become dominant on Twitter, and lead to Twitter profiles dedicated to clips grabbed from memeable streams, like No Context Mark Goldbridge for instance, which has 38.8k followers.

TREND 2. COLLAPSING NARRATIVES

Viral culture now requires background explainers to understand its meaning.

When Novak Djokovic celebrated his Australian Open win by putting his index finger to his temple, a slew of articles came off the back as publishers sought to tell the story behind this celebration which was inspired by Manchester United player Marcus Rashford, who introduced the celebration as a response to shutting out external noise.

On the surface, it was a simple gesture, but it had a backstory rooted in sports culture and is another example of fans discovering the story mid narrative.



KEY BRAND TAKEOUTS

Be brave and open up the creative process

Expecting a fan to follow your story on a single platform is far too limiting.

Instead, let your brand story be scattered across the internet in new ways, like we did with adidas to promote their Predator boot. We dotted clues across Instagram, Reddit, Twitter for audiences to piece together themselves, hijacking transfer deadline day - even working with Mr Transfer Deadline Day himself - Fabrizio Romano to help the launch.



Storytelling is no longer linear or following established structures.

Create a puzzle for your audience

Like the LA chargers, who released an anime-themed announcement for their season schedule, expertly weaving in narratives from popular anime series that featured a tonne of subtle easter eggs for in-the-know NFL fans. The video itself received 5.7m views on Twitter, but interestingly the explainer video had nearly 100k views as well.



TREND 3. MARGIN CHASERS

For Gen Z, the middle ground is the scorched earth. It's why in 2023 there's no worse insult on TikTok than calling someone 'mid' (meaning: middling). Coinciding with this is the rise of 'Goblin Mode', Oxford English Dictionaries' 2022 word of the year. When it comes to goblin mode, the more wild or subversive your energy, the more attractive it is. All this is to say that the extremely niche and the chaotic are winning out among sports fans.

What's driving it?

In Culture - niche is power

It used to be that fans would express their fandom through outrage on fan channels like AFTV, but now sports creators are carving out their own niches, from alternative commentary to comedy to ball making influencers like John Paul's Balls.

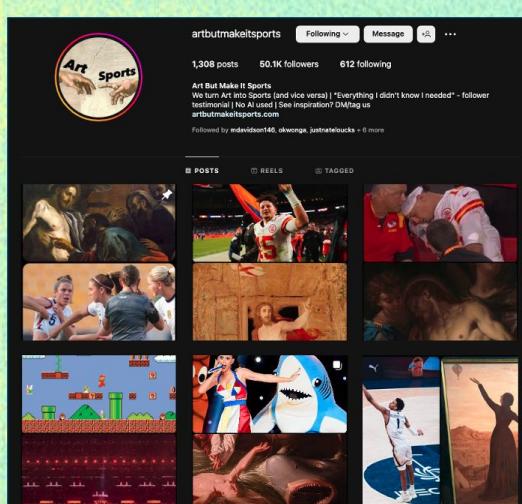
On Platforms - short-form video in a fast-paced attention economy

In a video-first social landscape where creators have only a tiny window in which to halt a person's scroll, there's more incentive to make content that's niche from the get-go. This is propelling the one-upmanship of weirdness to hold people's attention.

Behavioural Change

People are zooming all the way into a niche

The more specific your interest, the more genuine it seems. This explains the ever-expanding list of digital micro communities (weirdcore, goblincore, bubblegum witch) and the increasing cultural clout of precise, weird content, like Art But Make It Sports, an Instagram account dedicated to combining photos of sporting moments with paintings that look unnervingly similar.



On social, niche behaviour is seen as more authentic, gaining traction and cutting through.

People are pushing all the way out to the fringes.

It's not only the niche that is persuasive. In the era of extremes, deeply weird or chaotic energy is also resonating, from the unmatched energy of IShowSpeed (who made the unofficial anthem to this World Cup, with 72m views on his YouTube vid) to the weirdness of Gerard Pique's Balloon World Cup which had an average live viewership of 220,000. The more wild your energy, the more attractive it is, hence the mainstreaming of 'chaos' and Oxford's word of the year being "Goblin Mode".



People feel judged for occupying the 'middle ground' rather than the extremes, so they're dramatising the mundane.

In the face of chaos and extremity seen in the likes of IShowSpeed, the extreme nicheness of the balloon world cup, people are dramatising the mundane.

For example, we've seen Parkour Activists turning energy saving into entertainment, using their athleticism to turn off storefront lights across France shows how even banal forms of activism (turning off storefront lights) are being dramatised and performed in extreme ways.

TREND 3. MARGIN CHASERS

Key Brand Takeouts

There are countless ways to embody intensity of energy, ranging from absurd, to niche, to chaotic, to contrasting. But no one wants chaos for chaos sake.

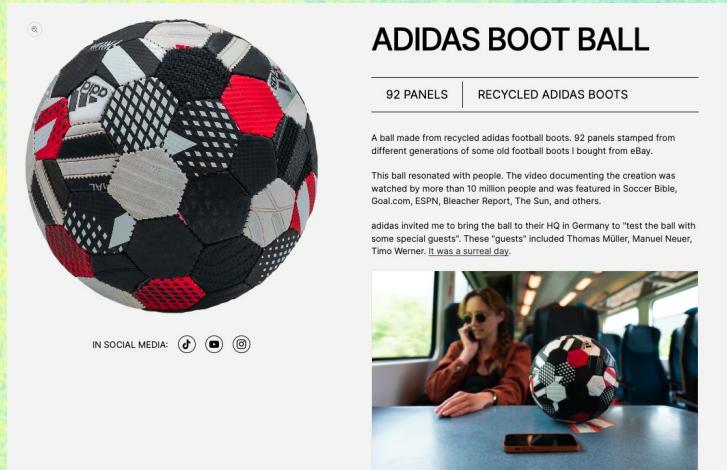
Brands should stick with their core values, but look for where these types of playful experimentation fit into their brand narrative.

Start with the story you want to tell.

With social media proliferating seemingly endless niches or extreme micro-trends, it's critical to be selective.

Define your strategic focus and then partner with the right communities or niche creators to tell the story.

For example, when adidas partnered with JonPaulsBalls, it made sense because he was already working with adidas materials and tied into their ball making abilities, having designed the ball for the Euros and World Cup.



On social, niche behaviour is seen as more authentic, gaining traction and cutting through.

Don't be afraid to challenge category and brand norms.

As algorithms continue to reward extreme and niche content, think about how you can make your brand stand out in a relevant way by challenging category norms. It's a great way to jolt people out of their scrolls and connect with new audiences. For example looking at Major League Baseball and their collaboration with Gucci, bringing together the worlds of luxury and sport with team sponsored handbags.



TREND 4. NEW COOPERATIVES

In 2022, the social life of the web was thriving.

An LGBTQ+ Discord server "to talk about everything women's football/soccer". A supportive subreddit for NYC runners. The fraternity fostered in the Strava clubs of Tracksmith or Rapha.

Conspicuously absent in all this? The individual profile page. With less self-branding and more open community, the 'social' part of 'social media' is changing.

Individuality is out – at least in its earlier form. Identity curation, self-presentation, hierarchy and status-seeking are being gently set aside to make more space for effective community-building, and forms of connection that are open, dynamic, and far less focused on the individual.

What's Driving It?

In Culture: Social Cynicism / Toxicity:

Last year, this report called out a more self-aware social landscape. This cynicism towards self-presentation online has continued – and is contributing to the push towards anonymous online culture as a space stripped of the need for it.

But in sport in particular we see this is also being driven by online toxicity.

In a survey conducted at the European Championships, 1 in 4 ethnic minority football fans reported that they've been the subject of racist abuse on social media.

The World Athletics Body also conducted research following the Tokyo Olympics which found "disturbing levels of abuse of athletes, including sexist, racist, transphobic and homophobic posts, and unfounded doping accusations" on Twitter.

It's something that happened again after the last World Cup, when French players were racially abused on Instagram.

The cult of individual has given way to fewer ego-driven communities.

On Platforms: Social and media are separating

TikTok's prominence as a self-proclaimed 'entertainment platform' – not social network – is shifting norms away from the 'social and media' experience of Instagram. People are increasingly relying on different platforms for their social needs and their entertainment consumption.

Behavioural Change

The profile page is falling out of favour

Platforms that de-centre creators' profile pages (like TikTok) or rely on pseudonyms (like Reddit and Discord) have pushed into the mainstream and grown dramatically.

E.g. The latest annual data for Discord and Reddit shows the platforms had user growth of 40% (up to 140 million) and 16% (up to 430 million). Subreddits like r/theocho and r/formuladank have swelled, with their pseudonymity allowing people to express themselves and geek out about niches free from judgment. For example, r/theocho has 509,000 members and is dedicated to highlighting the more obscure sports in the United States and around the world.

Equity and power is being given to sports communities

People are moving towards brands that enable collective ownership / collaborative co-authorship. We see it in the rise of Substack – where top sports journalists are rejecting a top-down newsletter model in favour of collaborative, anonymous subscriber threads that act as ongoing brainstorm rooms.

E.g. Marc Stein's booming newsletter about basketball is celebrated for its collective authorship. Rather than a top-down way of working, Marc engages with his community through Substacks chat function, making it less like a publisher and more like a community.

TREND 4. NEW COOPERATIVES

On a smaller scale we also see this with the rise of DAOs, where members have a stake in the brands they love

LinksDAO is a decentralized group aimed at buying a golf course for its members. The first batch of LinksDAO NFTs sale accumulated \$10.5M, and provides its holders membership in the future golf course.

People are performing trends communally, not individually

Hopping on a trend once meant putting an individual spin on a wider movement – a song, dance, or aesthetic moving through culture. Now, trends are increasingly performed communally rather than individually, meaning the end goal is to be part of the crowd, rather than the loudest voice in a trending conversation.

Sing Your Dialect was a karaoke-inspired Twitter Spaces event hosted by Jacob McLaughlin, an 18-year-old hailing from the British city of Manchester.

Going live on an unassuming Monday night, it was originally intended to be a space for Jacob and his extended circle to “rate or slate” each other singing iconic karaoke songs like ‘It Wasn’t Me’ by Shaggy, or Robbie Williams’ ‘Angels’ in their respective regional accents. But it quickly garnered global traction, and over the course of the night, 150,000 people tuned in, reportedly including Barack Obama and England midfielder Declan Rice, with Rice being among many celebrities to enter the stage and sing their hearts out.

adidas’ Run For The Oceans challenge demonstrates the enthusiasm there is for inclusive online trends. Accessible on their running app, adidas partnered with Parley (an organisation that addresses the plastic pollution of oceans) and committed to cleaning up 1 bottle from beaches and coastal communities for every 10 minutes participants run.

The campaign was a huge success. Over 6.5m people joined in, doing more than 8m minutes of activity and 250,000kgs of plastic tonnes of waste removed from the Oceans

The cult of individual has given way to fewer ego-driven communities.

KEY BRAND TAKEOUTS

Give emerging talent a platform to succeed

Inspire creativity and give communities the opportunity to collaborate with talent they wouldn’t otherwise have access to. Just like MLB did when they launched their Creator Class programme which invites TikTokers to be brand ambassadors, creating content for the league, with the league placing itself at the heart of Gen Z culture as a result. This is about marketing with communities, not at them.



Partner With Communities To Inspire Creativity

On the 10 year anniversary of Gay Gooners, Arsenal created a campaign alongside the fan group, “Arsenal for everyone”. It saw Gay Gooners feature in a video alongside Arsenal players like Aaron Ramsdale, where they reiterated that there’s no place for homophobia in football. All Premier League clubs now have official LGBT supporters groups, but Arsenal’s is now the largest (in the world!) with over 1,100 members.



TREND 5. EXPANDING IDENTITIES

On top of the rise of new co-operatives, the ego-centric nature of Gen Z is also being eroded by their experimentation with fluidity when it comes to their online identity. If managing one ego is hard, imagine trying to manage multiple at the same time...

As they trade rigidity for flexibility, we're seeing the way they express themselves online reflect this shift.

It's why we see sports fans bridge the worlds of fashion and sport, an athlete like Tom Daley share his love for knitting on TikTok, or a sports icon like Luka Doncic create a virtual alter-ego of himself.

Against this backdrop, sports brands and creators alike are finding new ways to engage the next gen through unprecedented partnerships and identity play.

What's Driving It?

In Culture - Fluid Identities: Gen Z had already dropped the singular, static 'personal brand' for the modular identity. Their idols are genre-hopping, like the pop-punk of Willow Smith or the emo, indie, experimental work of Billie Eilish.

TikTok subcultures famously borrow from each other, overlap, or even contradict (love paganism and exfoliating? 4.7 billion views of 'clean girl goth' content suggest that contrasting identities is the new normal).

67% of Gen Z respondents said they believe that identity labels are too limiting
(Vice, 2019).

On Platforms

The Avatar-ification of Identity: the ability to have a more "human" form of self-expression online – one that fosters deeper connection and understanding – will have an important impact as we continue to digitise our lives. Research found that avatar communication can effectively compensate for a lack of social resources in real life, and the likes of Genies and Ready Player Me allow for the creation of hyper-realistic avatars.

Sports fans and athletes are venturing beyond the boundaries of the category.

Genies can be deployed across the full Meta suite of apps, while Ready Player Me is designed to be interoperable across all platforms.

Entertainment > Status:

The old rules of reach have eroded. No longer does a big following ensure strong engagement and a big audience, with platforms shifting to algorithm based feeds that show recommended content from outside your follower count, rather than content solely served by who you follow.

Behavioural Change

Hardcore Sports Fans are making way for fluid, lifestyle-first sport fans. Sports fans aren't "hardcore" or "superfans" as previously defined. Young generations today have multiple interests, they consume multiple sports and support multiple teams.

They're cultural chameleons and revel in adjacencies being combined in fascinating ways. It's why we see Wales Bonner drop her collaboration with adidas for the new Jamaica kit on the runway at Paris FW to much fanfare, or Instagram pages dedicated to Footballers Fits with hundreds of thousands of followers. For younger generations, they don't see a difference between the worlds of fashion and sport or music and sport. It's all part of the mosaic/tapestry that makes up their lifestyle.



Modern athletes are using creator-first platforms to show their multidimensionality.

Athletes like Tom Daley are using TikTok to show they're more than just athletes – they're creators and personalities in their own right. Tom Daley has won over fans with his knitting skills on TikTok, and we even see content formats being made out of these on platforms like YouTube.

TREND 5. EXPANDING IDENTITIES

Lebron James' 'The Shop' garners millions of views. Featuring stars from across the entertainment landscape like Naomi Osaka, Jay-Z and Megan Rapinoe, the show is not set in a stadium or arena but in a barbershop, where Lebron and his business partner Maverick Carter invite guests to speak about issues personal to them, whether it be activism, their journey to success or what motivates them.



Athlete virtual identities are providing new ways for fans to engage with their idols.

NBA player Luka Doncic has launched an AI-enabled digital alter-ego to take control of his TikTok account.

Doncic's virtual persona, called Luk.AI, uses artificial intelligence and fan interactions to develop its personality, skills and interests over time. The supremely realistic likeness has been built on the MetaHuman creator platform – owned by video game developer Epic Games.

Doncic's metahuman is also augmented with neural network technologies trained with real-world facial animations from a performance capture of the All-Star. Doncic is the first NBA player to harness this new technology. Luk.AI will allow him to connect and engage with his global fanbase in a new and immersive way inspiring next gen tech opportunities



Sports fans and athletes are venturing beyond the boundaries of the category.

KEY BRAND TAKEOUTS

Facilitate fan expression that encompasses their fluid identities

Brands can think outside the box about how avatars can convey personal identity. It's what adidas did with its Originals Ozworld platform, where users answered questions about their personalities and were given bespoke avatars that embodied their psychological identity, rather than their physical traits.



Prioritise partnering with creator first athletes

At the Summer Olympics in Tokyo, it wasn't a gold medallist who was the most engaged with athlete on social media. It was Ilona Maher, a member of the USA's rugby team. She earned 22 million interactions and 126 million video views over the Olympics with content that spoke to her audience on their level through adopting creator and TikTok-first behaviours. Consider partnering with athletes like Ilona Maher that are benefitting from these changes to the traditional notions of influence and reach



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