THERE’S NO OPPORTUNITY WITHOUT INSIGHT.

The global sports fashion market is expected to reach $567 billion by 2024, with an annual growth rate of 7%.*

Despite this huge opportunity, many of today’s sports fashion brands will no longer be leaders in 10 years, due to a failure to embrace digital transformation.**

Since research is the basis for marketing intelligence, social intelligence is the springboard for digital change, providing the speed and insight to continue winning in a digital future.

Who will shape the sport fashion industry of tomorrow?

GEN Z IS THE VOICE OF THE FUTURE.
Born between the mid-90’s and early 2000s (13-24 years old), Generation Z is the demographic cohort after The Millennials, and set the pace for future trends – fluent in digital and social natives.

Linkfluence captures data from 400 million sources, and uses AI and human researchers to structure and analyze this data to reveal key consumer insights.

DISCOVER THE ANSWERS TO THE QUESTIONS BELOW IN THE FOLLOWING PAGES.
1. What's driving the brand affinity?
How are brands perceived, what's driving perception and who's leading?
Linkfluence solution
BRAND EQUITY TRACKING

2. Who are the Gen Z tribes?
Who are the most influential social segments based on these beliefs?
Linkfluence solution
TRIBES TRACKING

3. What drives Gen Z to act?
What are the major trends being created by these brands and tribes?
Linkfluence solution
TREND DETECTION
Equity tracking

HOW ARE BRANDS PERCEIVED, WHAT’S DRIVING PERCEPTION AND WHO’S LEADING?

When Generation Z thinks about sports fashion, the tribes’ conversations are shaped by four main drivers:

1. Dream higher with sport
   A brand with sport legitimacy

2. Express your style
   A brand with cool, stylish and iconic products

3. Stand out with your values
   A brand with purpose

4. Perform with the best materials
   A brand with technical and comfortable products

Each brand’s performance is a factor of its Awareness, Desirability, Proximity and Relevance (ADPR).
Exploring two tensions within Gen Z’s aspirations for sports fashion brands.

Nike empowered women in sports during WW Football Cup. Nike dominated social media mentions even though Adidas was the official sponsor. Nike’s female stars exert a strong emotional grip on fans as many of them serve both as footballers and spokespersons for women’s rights and LGBTQ equality.

#filaexplore, a pop-up store offering a phygital experience, was approved by Gen Z. FILA took fashion enthusiasts on a tour of its ‘Explore’ pop-up in NYC. The event interpreted four eco-inspired environments. Guests were among the first to discover FILA’s outdoor-inspired ‘Explore’ collection while being treated to bites and cocktails inspired by the four environments.

Patagonia supports Gen Z climate activists in an impressive outdoor media campaign. To raise awareness for Climate Week, Patagonia created an outdoor campaign featuring teen activists from around the world. In addition, the company closed its doors so employees could march alongside activists in the Global Climate Strike.

With the North Face FUTURELIGHT™ fabric, technical wear merges technicality and comfort. The material is sustainably-designed to be soft, lightweight, flexible, comfortable, and durable. The designers can adjust the weight, stretch, breathability, durability, construction, and texture of the fabric to fit the needs of consumers’ activity or environment.
WHO ARE THE MOST INFLUENTIAL PSYCHOGRAPHIC SEGMENTS BASED ON THE GEN Z DRIVERS?

For Gen Z tribes, sportswear is a way to express vision and identity and strengthen systems of value. Brands are adopted by specific tribes based on the perception of the tribe and alignment with their drivers as they evolve.

HOW DO WE DEFINE TRIBES ON THE SOCIAL WEB?

Unlike traditional demographic segmentation, tribe-based analysis structures social media posts into groups based on similarly exhibited attitudes, interests, values, lifestyles, and other traits.

1. Common language
   Common practice, slang, aesthetics and style

2. Common activities
   Distinctive marks, ritual practices, group activities

3. Common space
   Both offline and online spaces

4. Common values
   Common references (media, influencers, celebrities and system of values)
### The Tribes

<table>
<thead>
<tr>
<th><strong>STAND OUT WITH YOUR VALUES</strong></th>
<th><strong>DREAM HIGHER WITH SPORT</strong></th>
<th><strong>PERFORM WITH THE BEST MATERIALS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>VSCO Girls</strong>&lt;br&gt;The perennial beach-ready girls&lt;br&gt;adicted to sunny, faded,&lt;br&gt;social-inspired VSCO filter.</td>
<td><strong>All Together Performers</strong>&lt;br&gt;Performers train-compete&lt;br&gt;perform a sports routine to create&lt;br&gt;community and empowerment.</td>
<td><strong>The Fit Squad</strong>&lt;br&gt;Teens and young adults keen&lt;br&gt;on outperforming themselves&lt;br&gt;through fitness.</td>
</tr>
<tr>
<td><strong>Conscious LGBTQI+</strong>&lt;br&gt;Proud of their queerness, and it’s&lt;br&gt;everywhere – on social, in their&lt;br&gt;style, attitude and makeup.</td>
<td><strong>Yogis and Yoginis</strong>&lt;br&gt;Young beings travelling the US to broadcast meditative&lt;br&gt;messages and activism(s).</td>
<td><strong>#DoYou Creators</strong>&lt;br&gt;Sporty Chinese girls addicted to&lt;br&gt;innovative apps who raise their&lt;br&gt;voice on social media platforms.</td>
</tr>
<tr>
<td><strong>DEMOGRAPHIC</strong>&lt;br&gt;Female, 14-23 y/o, visible in the&lt;br&gt;US, especially California and Florida.</td>
<td><strong>DEMOGRAPHIC</strong>&lt;br&gt;Female 20-30 y/o, visible in&lt;br&gt;US big cities and rural states.</td>
<td><strong>DEMOGRAPHIC</strong>&lt;br&gt;Female, 18-34 y/o, mostly&lt;br&gt;visible in big Chinese cities.</td>
</tr>
<tr>
<td><strong>STYLE</strong>&lt;br&gt;Streetwear, Californian-inspired,&lt;br&gt;researched-casual.</td>
<td><strong>STYLE</strong>&lt;br&gt;Activewear with a specific interest&lt;br&gt;for functionality and mobility.</td>
<td><strong>STYLE</strong>&lt;br&gt;Streetwear and sportswear.</td>
</tr>
<tr>
<td><strong>INTERESTS</strong>&lt;br&gt;Junk food and candies, festivals,&lt;br&gt;fashion and photography.</td>
<td><strong>INTERESTS</strong>&lt;br&gt;Dance, hip-hop, jazz&lt;br&gt;and competitions.</td>
<td><strong>INTERESTS</strong>&lt;br&gt;Trendy events, fashion, social&lt;br&gt;media and innovative apps.</td>
</tr>
<tr>
<td><strong>KEY PRODUCT(S)</strong>&lt;br&gt;Hoodie, crop, fashion backpack,&lt;br&gt;sneakers, crop top and mini short.</td>
<td><strong>KEY PRODUCT(S)</strong>&lt;br&gt;Leggings, sporty bra,&lt;br&gt;shorts and cap.</td>
<td><strong>KEY PRODUCT(S)</strong>&lt;br&gt;Leggings / mini-short, sports bra,&lt;br&gt;sneakers crop top, oversized T-shirt.</td>
</tr>
<tr>
<td><strong>KEY BRANDS</strong>&lt;br&gt;Brandi Melville, Vans, Adidas,&lt;br&gt;Nike, Forever21 and Hydroflask.</td>
<td><strong>KEY BRANDS</strong>&lt;br&gt;AloYoga, Target, Reebok and Adidas.</td>
<td><strong>KEY BRANDS</strong>&lt;br&gt;Puma, Vans, Nike, Adidas origins,&lt;br&gt;FILA, Lululemon, Under Armour.</td>
</tr>
<tr>
<td><strong>KEY INFLUENCERS</strong>&lt;br&gt;Heron Ob, Griddled, Makeupgrlz,&lt;br&gt;Anita Grande, Billie Eillish,&lt;br&gt;Post Malone and Kylie Jenner.</td>
<td><strong>KEY INFLUENCERS</strong>&lt;br&gt;Byonics, Igga, Blondedel, Dytto,&lt;br&gt;Justin Bieber, Norman, Sam&lt;br&gt;Smith, John Legend, Buttermone.</td>
<td><strong>KEY INFLUENCERS</strong>&lt;br&gt;PopSugar Fitness, Creatist,&lt;br&gt;WellandXGird, Stephanie&lt;br&gt;Buttermone, Nikki Blackletter.</td>
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**Note:** To unlock this data and more, get the full report by clicking here.
Gen Z macro trends

Aggregating the trends of each social media tribe, Generation Z exhibits three major macro-trends.

MACRO TREND #1
Meaningful aesthetics
Sportswear aesthetics are a way for expressing unity and common values within multicultural contexts.

MACRO TREND #2
Collective meets individual
Gen Z sportswear conversations fully intertwined concepts of collectiveness and individuality to blur traditional lines.

MACRO TREND #3
Gender equality and feminism
Communities of women use workout as self-empowerment and to create a vision of sports without gender differences.

To unlock this data and more, get the full report by clicking here.
WANT THE FULL REPORT?

Request the full 90-page in-depth report produced by expert researchers in the sports fashion industry, with deep-dive analytics and insights, including:

1. Description of each conversation driver, and why each is important for affinity and relevance.
2. List of the top performing brands within these drivers, and how they're positioned.
3. Identification and details of the digital tribes shaping the trend, with breakdowns of each.
4. Macro trends for Gen Z's impact on the growing Sports Fashion industry and tips on how to connect and resonate with this generation.