


GLOBAL BRAND LAB REPORT

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Summer

four



July brings with it a sports extravaganza that captures the imagination and spirit of fans worldwide. This month's Brand Lab shines a spotlight on the summer of sport, a time when the thrill of competition unites us. From the intensity of the Euros and the tradition-laden courts of Wimbledon, to the global camaraderie of the Olympics and more, Summer 2024 is set to be an action-packed showcase of athleticism, passion and the unifying power of sport. Read on to learn about the most creative and impactful campaigns, brand activations and social media trends that are defining this period. Discover how much British consumers are spending and investing into sporting events and how they are choosing to experience this summer's sporting festivities. Explore the strategies that brands are using to engage with the public, and how these events are shaping the summer narrative!

Images on this page are of Dubai, our destination spotlight this month. See page 8 to find out more.

FASHION & LIFESTYLE

CELEBRATING OLYMPIC HERITAGE AND ATHLEISURE TRENDS



Vogue World took over the last day of Paris Fashion Week on International Olympic Day

On International Olympic Day, Vogue World ended Paris Fashion Week with a celebration at Place Vendôme, marking 100 years of French fashion and the Olympics. The event featured Aya Nakamura, Kendall Jenner, Gigi Hadid, Venus and Serena Williams as well as over 151 models and 188 athletes showcasing designs by Chanel, Balenciaga, Jacquemus, and Dior.



Lacoste launches “Olympic Heritage” collection ahead of Paris Summer Olympics

Lacoste’s “Olympic Heritage” capsule collection celebrates the 1924 Paris Games ahead of the 2024 Olympics. Featuring reimagined vintage styles in polo shirts, caps and jackets, the collection embodies sportsmanship and French elegance. Available online at Lacoste’s flagship stores on the Champs-Élysées and in the Marais as well as in all Paris and host city stores, a special pop-up will open at Charles de Gaulle Airport on 1 August for one month.



Football jerseys: Fashion’s new celeb-approved athleisure trend

The latest trend in athleisure is the football jersey, which has been making waves beyond the pitch. Brands like Adidas and Nike have led the charge with football-inspired capsules, while Balenciaga featured vibrant jerseys in their 2023 resort collection. Celebrities like Dua Lipa, Kim Kardashian and Taylor Swift have been spotted rocking vintage and merch jerseys, solidifying the trend’s shift from sportswear to everyday fashion statement.

CONSUMER TRENDS, CAMPAIGNS & BRAND ACTIVITY

ALLY FINANCIAL PROMOTES WOMEN IN SPORTS, 'HEINECARE' BEER INSURANCE POLICY FROM HEINEKEN, SPORTS DIRECT 'FOOTBALL FEVER STARTS HERE'

Ally tees up a Fortnite Golf experience to promote its sponsorship of women's sports

Ally Financial and Super Awesome have collaborated to create interactive experiences within Fortnite, targeting younger sports fans without ties to traditional TV. They've developed virtual games and locations to promote sponsorships, like the USGA. The goal is to build brand recognition among 18–30 year olds by connecting Ally with their interests, leveraging Fortnite's large audience for brand awareness and engagement.

Heineken's beer insurance during Euro 2024

Heineken, in collaboration with Publicis London, introduced "HeineCare," an insurance policy for football fans to claim a refill if they spilled their beer during the Euros. The campaign was active in five UK pubs, where fans could scan a QR code on Heineken beer mats to receive a voucher for a free Heineken or Heineken 0.0. Additionally, Heineken partnered with Rainkiss to create "Pint-chos," beer-resistant ponchos distributed for free at participating pubs and through social media contests. The campaign, which addresses the spilling of 11 million pints during major sporting events, also featured celebrities and influencers promoting the Pint-chos, emphasising Heineken's commitment to protecting fans' beer enjoyment during football festivities.

Football fever starts here

Sports Direct's Euro 2024 ad celebrated football with a nostalgic twist. Featuring stars like Conor Gallagher, Jordan Pickford, Ruben Dias and Ian Wright, the ad portrayed how football fever unites diverse areas, emphasising passion and community spirit. Shot in a charming 90s style, it highlighted ordinary places like a Manchester cul-de-sac, evoking nostalgia and broadening its appeal across generations.



CONSUMER TRENDS, CAMPAIGNS & BRAND ACTIVITY

OMEGA X OLYMPICS CAMPAIGN AND POWERADE'S INSPIRING COMMERCIAL



Battersea Dogs and Cats

Battersea Dogs and Cats created a new print and digital campaign with the slogan 'Coming home? That's up to you'. It highlights Battersea's cat rehoming function, with the charity working tirelessly to find loving homes for the cats in their care.

Omega

Omega has launched its marketing campaign for the Paris Olympic Games, where it will serve as the official timekeeper and provide all the high-tech equipment necessary for timing events and delivering data to broadcasters, stadiums and athletes.



Powerade

Powerade, a global leader in sports beverages has launched a national campaign featuring Sha'Carri Richardson and Katie Grimes. In two dynamic 30-second ads, Powerade's 'It Takes More' initiative highlights the relentless dedication, sacrifice and preparation that athletes put in to reach the pinnacle of their sports. The campaign emphasises the unseen hours of training that fuel world-class performances and aims to inspire the next generation to pursue their dreams with unwavering commitment.



SOCIAL MEDIA TRENDS

SPORTS DIRECT PARTNERS WITH RUSS COOK, X LOSING GROUND AS NEWS SOURCE, PINTEREST LAUNCHES PROMOTIONAL CAMPAIGN

Sports Direct partners with Russ Cook for The Running Charity

Sports Direct has partnered with charity fundraiser Russ Cook (@hardestgeezer) to promote the Euros and raise money for The Running Charity. Russ Cook took on the challenge to run to Germany to support England's men football team. Cook set-off from Wembley Stadium in London to reach Germany before England's opening game against Serbia and also ran from city to city following the team throughout the tournament.

X is losing ground as a news source per report

According to the latest Reuters Institute Digital News Report, social media users are relying on X less and less as a source of news and information, with TikTok now a bigger source of news coverage in many regions. The report takes a look at how people are accessing news content around the world, and the role that different social platforms are playing in such.

Pinterest launches promotional campaign to highlight discovery

Pinterest has launched a new promotional campaign as it seeks to boost awareness among potential ad partners, this time by highlighting the benefits of the platform in connecting users with a wide variety of interests. Its new campaign aims to highlight "how the platform turns the journey of self-discovery into a true adventure," through fantastical scenes that incorporate various popular interests.



INFLUENCERS & KOLS

RUNNING THE SOCIAL GAME



**@issysedgwick &
@proddyc**

**74K Instagram Followers
76.7K TikTok Followers
(combined)**

Issy and Calum are a London couple whose pages have recently grown from their passion for running, a trend which has taken over social media in 2024. Issy's content has more of a foodie focus as well as fitness whereas Calum's content is a mix of fitness and his work with The Fellas Podcast.



@daisreed

**31.9K Instagram Followers
26.2K TikTok Followers**

London-based Daisy is the senior social media manager for SheerLuxe and LuxeGen, often featuring on both channels where she showcases her unique sense of style. She has her own run club called Shuffle Club which has partnered with brands such as Whoop.



@savannahsachdev

**216K Instagram Followers
107.8K TikTok Followers**

Savannah is a London based lifestyle and fitness content creator, who grew her following on TikTok from vlogging her run streak. Savannah's run streak consisted of running at least one mile a day and has now achieved this for over 1,000 days.

DESTINATION SPOTLIGHT

DUBAI, UAE



Dubai is a must-visit destination this summer, especially for sports enthusiasts, as it hosts the 14th edition of Dubai Sports World. This event, running from 22 June to 8 September, transforms the Dubai World Trade Centre into the region's largest indoor sports venue, offering a wide array of activities.

Visitors can enjoy ten core sports, including football, basketball and cricket, along with new attractions like a free-to-use gym and family-friendly activities such as foosball and retro arcade games.

With a total area of 300,000 square feet, the venue offers bookable pitches and courts, supervised play areas for children and a variety of challenges and events for all ages and abilities.

What's more, former NBA all-star Dale Ellis is collaborating with Never Quit Stay Fit and TAAL Sports to offer a summer camp to young athletes aimed at developing skills, fitness and personal growth.

This year's edition promises to be the biggest and most diverse yet, making Dubai an unmissable destination for a summer full of fitness, fun and community spirit.

CONSUMER INSIGHTS

BRITS DURING THE SUMMER OF SPORTS



One in three Brits will avoid watching this summer's sporting events

15% of 2,000 persons surveyed said they had no interest in watching football, tennis or athletics on TV, and 69% said they were searching for anything else to do while their friends and family watched sports. On big match days, 16% declared wanting to meet up with friends somewhere else to avoid sports fever, whilst 13% admitted they would be sucked into the frenzy due to FOMO.

Britons to spend £178 billion on memorable experiences this summer

According to a study by Barclays, Britons are expected to spend an average of £3,322 per adult on experiences such as events and live entertainment this summer. The majority of this spending will go towards overseas events (£906) and staycations (£615), with the remaining 46% allocated to other activities such as sporting events, concerts, and "competitive mingling." The Centre for Economics and Business Research estimates that UK businesses providing these experiences will contribute £134 billion to the local economy between June and September.

National pride peaks as Brits gear themselves up for summer of sport

The summer of sport has been heating up, with Brits set to feel a surge of national pride. A survey of 2,000 adults revealed that 85% of Brits feel a sense of patriotism while watching sports, and 62% believe their national pride will peak during the summer sports season. The study also found that 72% of respondents are eagerly anticipating this year's Olympics and Paralympics, hoping for another 'Super Saturday' moment like in London 2012, which evokes feelings of pride, happiness and nostalgia.

SPORTING SUMMER



With the Olympics, Euros, Wimbledon, Formula One and Tour de France all going on, **Europe is packed with sports fun this summer.**

According to WARC, the Tokyo 2020 Olympics recorded an impressive **28 billion video views** across its broadcast partners' digital platforms, and **the Paris 2024 Olympics are expected to attract even more digital viewers than ever before.**

This presents a **valuable opportunity for brands to connect with audiences** in new ways in the age of fragmented media.

There's been a **50% increase** in number of Google searches for **'watch live'** between June and July 2024 in the UK; with related search terms being 'euros 2024', 'football', 'BBC', 'tv live', etc.

72% of women's sports fans have expressed an **interest in athletes** outside of their sport – in **lifestyle** and **fashion**, for example.

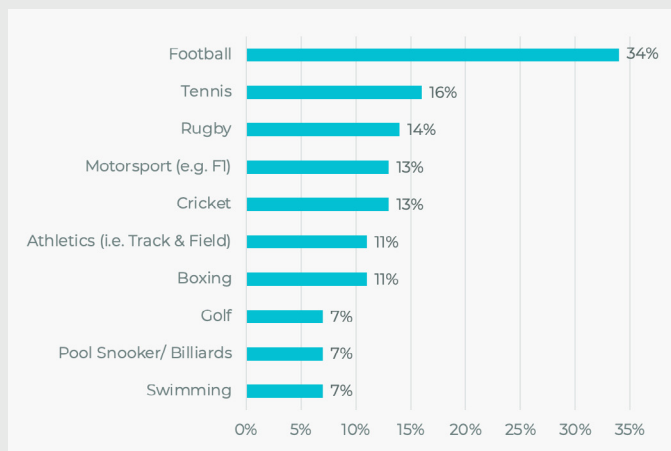
Athlete influencers get **2.5 times higher engagement rates** and **reach an average of 23% more followers** per social post, compared to traditional influencers.

Source: Mapper360®, WARC, Savanta

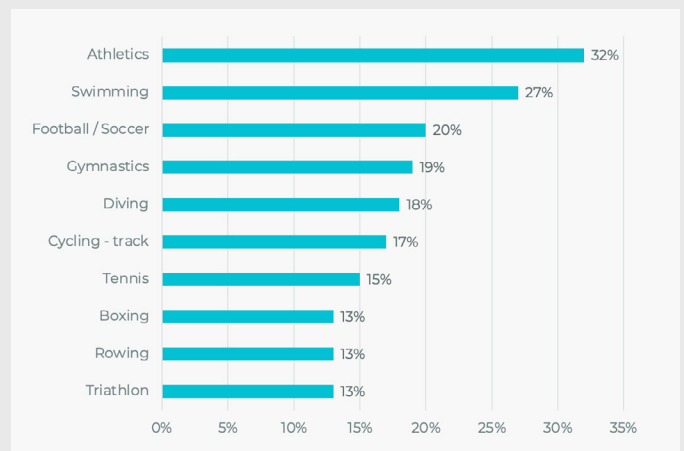
SPORTING VIEWERSHIP

Football, tennis and rugby are the most popular sporting events in the UK; whilst the Olympics see athletics and swimming attracting most viewership

Top **sporting events** followed by the UK population





Top **summer Olympics sports** followed by the UK population



Middle-aged men constitute the largest proportion of sporting fans, who most frequently watch on BBC iPlayer

PERSONALITY


Humorous **Dependable**

AGE & GENDER

41 - 55


year old men

LOCATION




Manchester


TOP STREAMING PLATFORMS




1. BBC iPlayer




2. Amazon Prime



2. YouTube TV



4. Netflix



5. Sky Go

Source: YouGov
 Sample looking at people who self-identify their level of interest in sports is 'sports mad'.
 Market size: 6.5M

MAINSTREAM VS NON-MAINSTREAM SPORTS

HOW DOES ONLINE CONVERSATION ABOUT MAINSTREAM AND NON-MAINSTREAM SPORTS DIFFER?

Mainstream sports: #EUROS2024 #wimbledon

The majority of the conversations surrounding mainstream sports focus on current competitions, mostly centring around reviewing the matches and the ability of specific players.

This screenshot shows three social media posts. The first is from JAMMIE Utd (@JamesChego9) celebrating France's victory in a football match. The second is a tweet discussing Wimbledon quarterfinals picks, mentioning Carlos Alcaraz and other players. The third is a tweet from @OptaJoe highlighting Kobbie Malnoo's high pass accuracy (96%) for the England national football team.

Non-mainstream sport: #padel

Talk of non-mainstream sports such as padel hone in on its surge in popularity, with many users sharing their experience of playing the sport. Conversation around the Al Galicia Open, tend to focus on the sport itself rather than the players.

This screenshot features content related to the sport of padel. On the left, there is a news article snippet titled "From Messi to Ronaldo, global popularity of padel hits new high" from Khaleej Times. The main part of the image is a collage of photos showing people playing padel on blue courts. On the right, a tweet from Lee Allinson (@lee.allinson) shares his positive experience of playing padel for the first time, mentioning his partner and a friend.

Source: Mapper360®

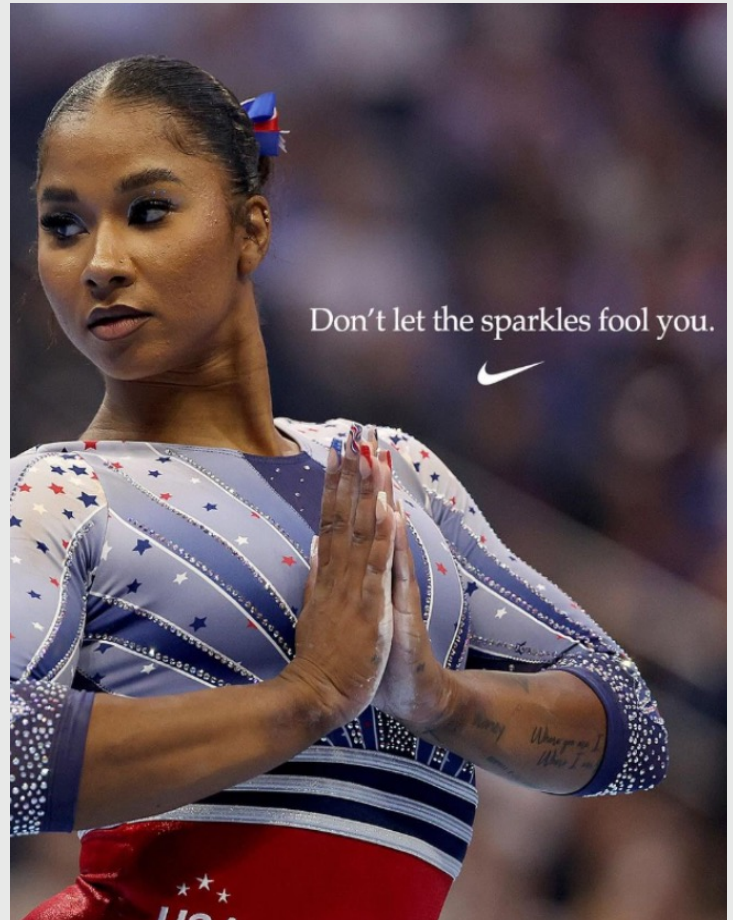
ATHELETE-BRAND PARTNERSHIPS

17% of the **top 50 most followed Instagram accounts** belong to individual **athletes**. Brands that partner with athletes can reach **larger audiences**.

Cristiano Ronaldo is the **most followed athlete on Instagram** with 643m followers. The **Ronaldo Effect** has been used to describe the amount of influence he has over consumer behaviour. An example of this, is **Coca-Cola's market value dropping by \$4 billion** after he removed bottles of their drink from his table at a press conference.

63% of online adults **follow their favourite athlete** on social media with a relatively even gender split (**65%** of males and **60%** of females engaging in this way).

The **global sports sponsorship market** was worth **\$66 billion in 2022** and is expected to rise to **\$108 billion by 2030**.



Top sports influencers:

Macro influencers (>100K followers)



@serenawilliams
17.2M followers

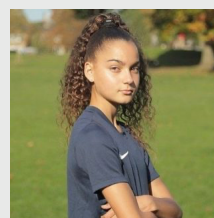
Former tennis player



@cristiano
634M followers

Footballer

Micro influencers (<100K followers)



@ashantiga
97.3K followers

Footballer



@mikeyanguas
99.8K followers

Padel player

Source: Mapper360®



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