

The Yoga Conversation

December 2013



CHANNEL SIGNAL 
listening makes you smarter

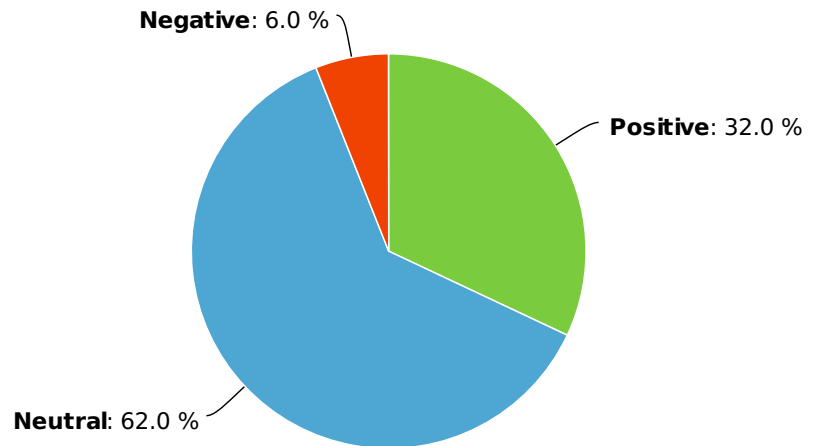
Category - Yoga

This report is part of a monthly series that documents online consumer comments made about yoga. The Channel Signal algorithm collects these comments from blogs, online media and social media platforms like Twitter, Facebook, YouTube, etc. We filter out the junk, assign each comment a positive/neutral/negative rating and analyze the clean data to report on the top issues and trends that drove the online yoga conversation for December. Our purpose is to provide actionable consumer insight to companies in the yoga business.



Activity / Sentiment Overview

Total Consumer Comments



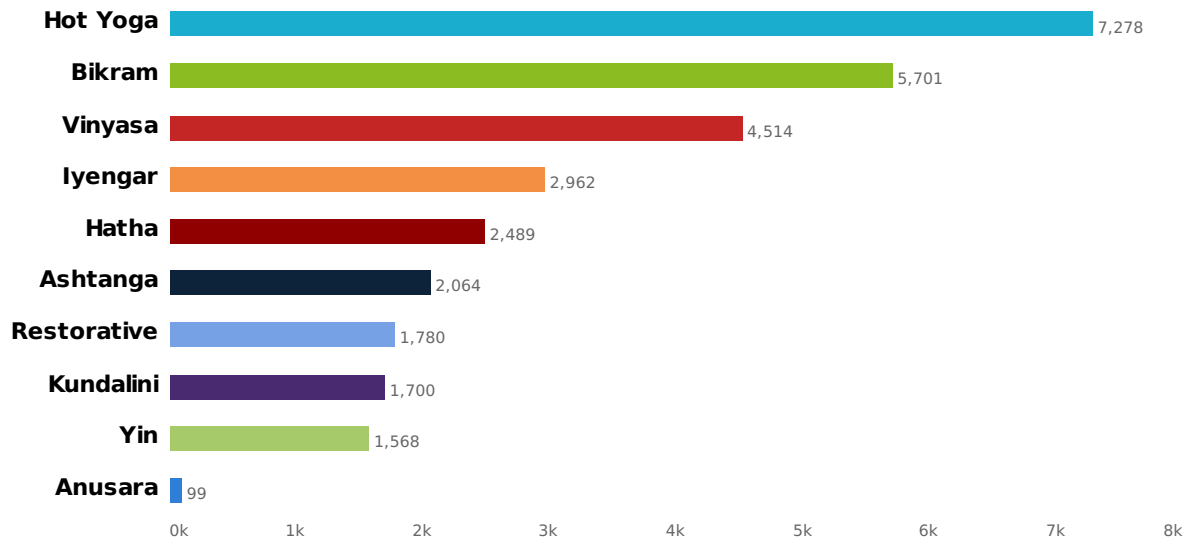
Channel Signal documented over 429,000 legitimate consumer online mentions of yoga, yoga brands and issues. The chart above shows the sentiment to be predominantly neutral; however, many of these comments shaded toward positive but did not contain the language to mark it as such.

Comparative Analysis

ANALYSIS: 1 | Which Yoga Practices Got Talked About the Most?

Hot Yoga is the style of yoga most talked about online, followed by Bikram. Interestingly, 308 of the comments referencing third place Vinyasa use the term "hot" or "heated". Clearly, Americans like their yoga hot. Despite a scathing profile on Bikram Choudhury in the December issue of Vanity Fair, the comments using the term "Bikram" were almost entirely about the practice, not the man.

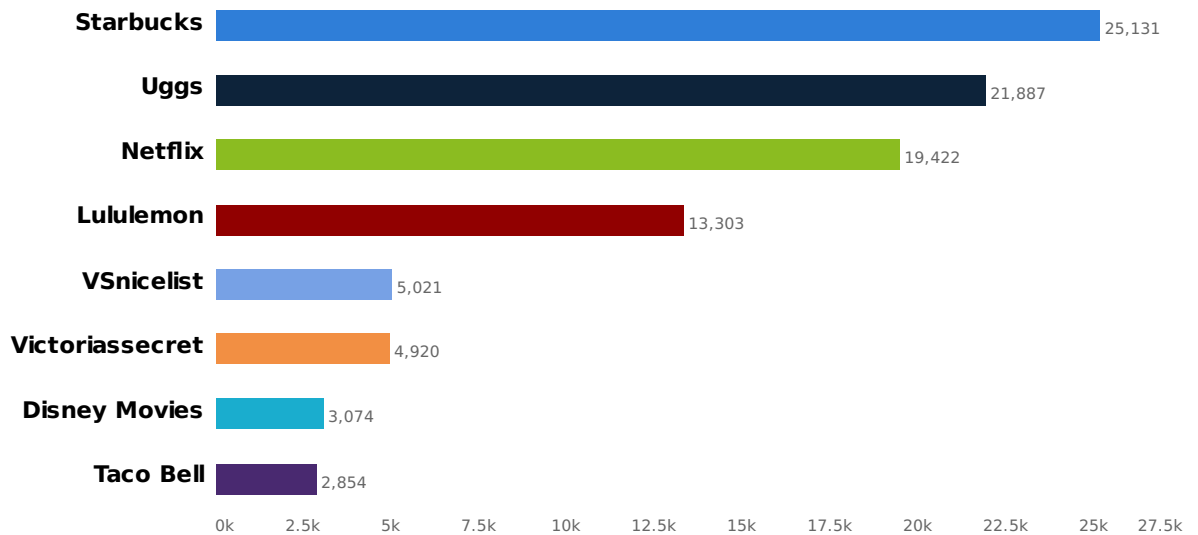
MENTIONS



ANALYSIS: 2 | The Top Brand Named in the Online Yoga Conversation was...Starbucks?

Wait a minute - Starbucks? Netflix? Taco Bell? Like it or not, these are the brands most frequently referenced when people talk about yoga online. The reason, which we discuss in more detail below, is that yoga and these brands are widely cited online as signs of the "Common White Girl". Channel Signal documented 1,383 retweets of this Twitter post alone: *"How are girls hard to understand? We like Taco Bell, Starbucks, cuddling, compliments, naps, disney movies, yoga pants, and shopping."* Lululemon was the most mentioned brand in the real business of yoga, followed by Victoria's Secret, whose brand mentions were outperformed by mentions of yoga pants in its VSnicelist holiday rewards program.

MENTIONS



Topic Analysis

TOPIC: 1 | Lululemon Bashing Continues - Goes Mainstream

Consumer comments targeting November's gaffe from former Lululemon CEO Chip Wilson, regarding the suitability of "some women's bodies" for yoga pants, were surprisingly light. More interesting was the fact that Lululemon's widely publicized problems with see-through fabric in certain yoga pant styles is still a major part of the brand conversation **nine months after the situation surfaced.**

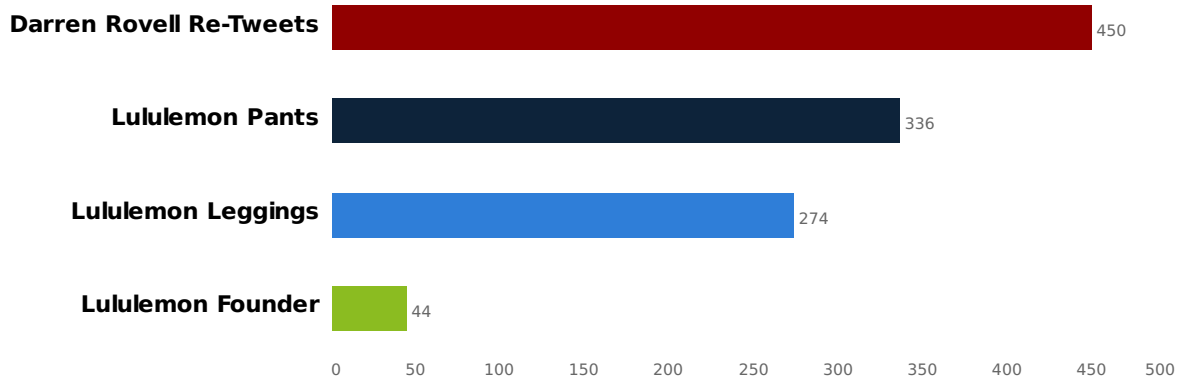


An example: a widely-shared tweet from ESPN broadcaster Darren Rovell showing a football player with wet, very sheer uniform pants ran with this text: *"Did Nike consult with Lululemon on its see through NFL pants?"* This is significant because 1) an ESPN football reporter is not exactly a typical observer of yoga developments, and 2) in talking to his audience of male, mainstream sports fans, Rovell's reference to Lululemon required no explanation. Even to non-yoga consumers, the brand is still equated with the see-through problem.

KEY INSIGHTS

For Lululemon, this situation is not going away. Aside from the comedic aspect, the lasting damage is the consumer's perception that equates the fabric problem with low quality. As a brand that purports to understand its consumer, Lululemon got caught shortchanging them. Product integrity has become a message that competitive manufacturers should take advantage of. How does this play out? Lululemon's CFO is estimating a loss of \$67 million for 2013, and the stock price continues to fall.

MENTIONS



KEY QUOTES

🗨️ **RT @darrenrovell: Did Nike consult Lululemon on its see through NFL pants? <http://t.co/XII5NebcsG>**

Link: <http://twitter.com/MedardoNava/status/414209512849944576>

Site: twitter.com **Author:** Medardo Nava (Klout 49)

🗨️ **Going to be shooting a yoga calendar for 2014. Does anyone have some see-through Lululemons I can borrow?**

Link: <http://twitter.com/HarshadaWagner/status/416345938417184769>

Site: twitter.com **Author:** D. Harshada Wagner (Klout 41)

🗨️ **Ready to give up on lululemon athletica? Let's do it together! Join me for the #dropluludrive this holiday season. Watch the video for details and requests for help... and spread the word!**

Link: http://www.facebook.com/126408064068432_655597434482823

Site: facebook.com **Author:** Alanna Kaivalya

🗨️ **CNNMoney: Lululemon's see-through apology <http://t.co/tVyalCI988>**

Link: <http://twitter.com/BusinessNewsVid/status/413071625915875328>

Site: twitter.com **Author:** Business News Videos (Klout 28)

TOPIC: 2 | Lifestyle Dominates the Conversation

The vast majority of the consumer yoga conversation had nothing to do with the practice of yoga itself - it was about girls wearing yoga pants and yoga being a stereotypical activity of affluent white women. While much of the talk was discouragingly sexist, many comments came from women embracing the style. We expected to document these kinds of comments, but we were surprised by the volume.

There is a recurring meme online that Channel Signal calls the "Typical White Girl". A mocking and constantly changing assortment of brands and activities are cited as examples of the things she loves: The North Face, Uggs, Starbucks, an iPhone and, yes, yoga pants, often from Victoria's Secret. An example: this post was retweeted an astounding 17,404 times on Twitter in December: *"White Girls" - a poem. I need starbucks now Like can this weather just not Netflix, uggs, and yoga pants Your so pretty I can't even.*" You can see more examples in the Key Quotes section below. We actually picked up over 3,300 retweets from women saying that *"Baseball pants to girls are like yoga pants are to guys."* Even the spinoff topic volume is significant.

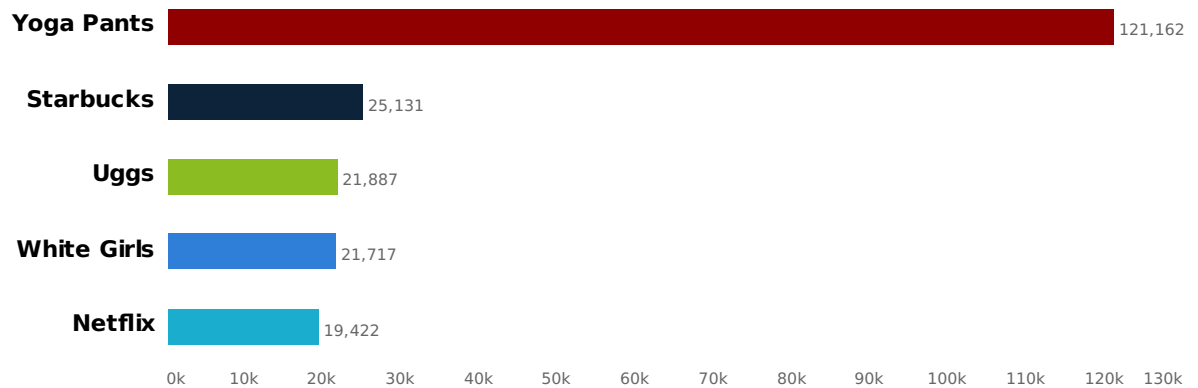
KEY INSIGHTS

It's possible to find this sheer volume discouraging (shouldn't these people be talking about chaturanga?), but we see some opportunities.

1) Clearly, a huge percentage of yoga clothing, especially pants, are being used for casual wear. That's nothing new for a purpose-built product; consider running shoes, Gore-Tex outerwear and Timberland boots. We see the chance to produce product, possibly at a lower price point or with non-yoga features for this casual audience. Carhartt does exactly this with their new Quick Duck line - the same look, but 30% lighter. They're targeting this same consumer desire.

2) Understand that some people view yoga as a cliché. Other communities with similar perception issues - think CrossFit and triathlon - leverage the fact that they are "the butt of jokes" as a rallying point for the tribe. Use this to your advantage.

MENTIONS



KEY QUOTES

- “ For more hot girls in yoga pants go to <http://fotozup.com>. Check the "For Guys" section.
 Link: <http://hotgirlswearingyogapants.tumblr.com/post/69806683099/for-more-hot-girls-in-yoga-pants-go-to>
 Site: tumblr.com Author: wildside22
-
- “ Typical white girl.. yoga pants, uggs, and an iPhone. All she is missing is some Starbucks. @KenzieLynn timer <http://t.co/wTNgBQ5EXr>
 Link: <http://twitter.com/youngbloodlynde/status/407728019227152384>
 Site: twitter.com Author: Dylan Lynde (Klout 41)
-
- “ I swear yoga pants are one of the greatest inventions ever made
 Link: <http://twitter.com/CourtRowedder/status/413443305817391105>
 Site: twitter.com Author: Courtney Rowedder (Klout 41)
-
- “ RT @CloydRivers: If finals had more questions about Starbucks, yoga pants, Christmas movies and Luke Bryan, white girls wouldn't even have to study. Merica.
 Link: <http://twitter.com/BrittneyBellamy/status/411329213384245248>
 Site: twitter.com Author: BritBell93 (Klout 25)
-
- “ RT @RonTheAnchorman: "White Girls" - a poem I need starbucks now Like can this weather just not Netflix, uggs, and yoga pants Your so pretty I can't even
 Link: http://twitter.com/amanda_rhoade/status/411953179421442048
 Site: twitter.com Author: amanda rhoade (Klout 43)
-
- “ RT @Ch4BrianFantana: 80% of women that wear yoga pants probably don't do yoga.. And 100% of straight men don't care.
 Link: http://twitter.com/david_tatlock/status/411366059489640448
 Site: twitter.com Author: Dave tatlock (Klout 26)

TOPIC: 3

The #1 Practitioner Goal - A Better Body

Once you set aside the volume of non-yoga-related brand mentions, it becomes apparent that the online yoga conversation is nearly devoid of talk referencing yoga brands and products. Yoga practitioners are quite active online, but their talk is about the experience and the results vs. how much they love the performance of their

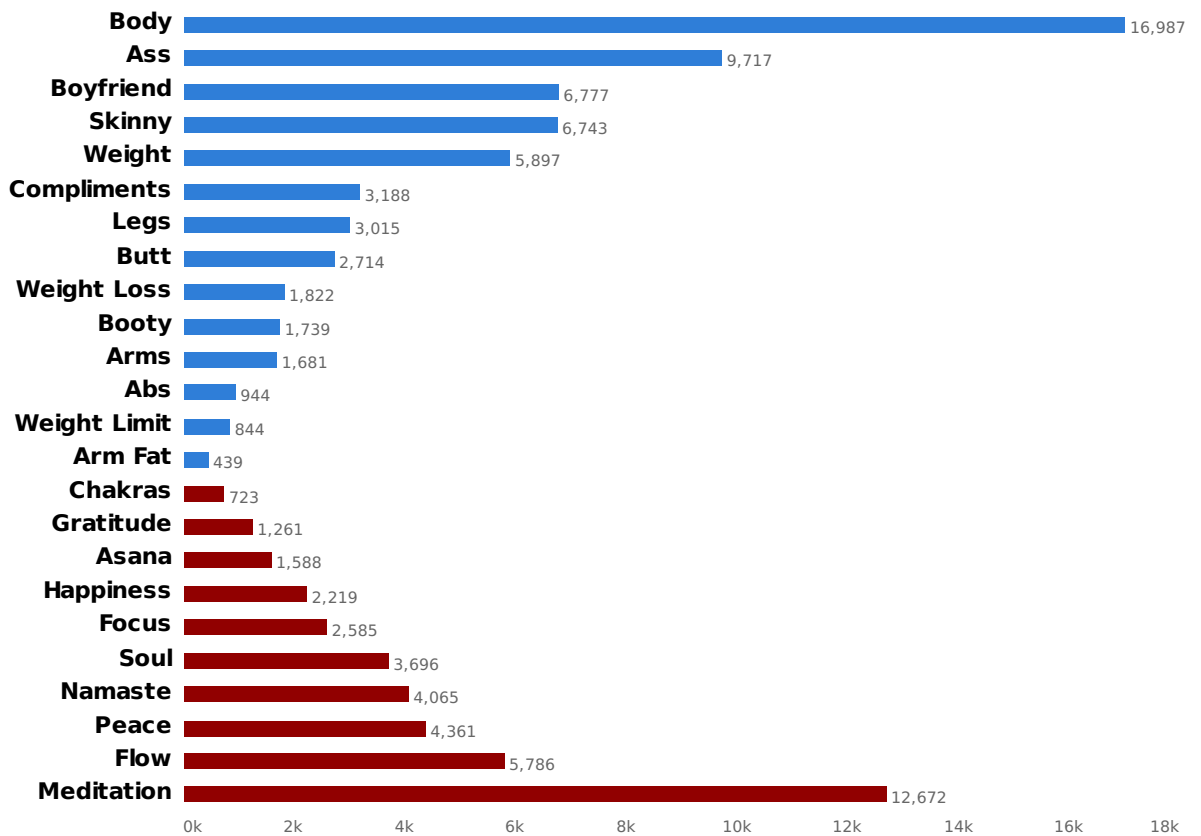
new pants or mat.

A breakdown of how consumers discuss the yoga experience points to another interesting trend - comments mentioning weight and body image outweigh those of a more spiritual nature. In the graph below, we contrast the use of specific terms like Weight, Skinny and Ass (indicated by the blue lines) with words like Peace, Meditation and Gratitude (in red). The results quantify the common observation that American yoga enthusiasts are more interested in looks than enlightenment.

KEY INSIGHTS

- 1) OK, so your customers are talking about the yoga experience instead of your products. Obvious question: How can you change that? Better question: Do you need to? Make sure your marketing makes it clear that your company understands the experience, because this audience makes it clear that forcing the conversation to product benefits isn't going to be effective.
- 2) The findings below quantify a well-established assumption: American yoga consumers are motivated by diet/body issues more than spiritual ones. They're telling you what they want. Address this fact as you market and develop product.

MENTIONS



KEY QUOTES

- “ Gray yoga leggings make my butt look even more perfect.
 Link: <http://twitter.com/WizardGoddess/status/409892792119595008>
 Site: twitter.com Author: Tori Anne (Klout 34)
- “ Beside yoga, I love VS workouts. Go perky booty, abs, toned legs and arms! God bless me!
 Link: <http://twitter.com/Saell94/status/409972553155760128>

Site: twitter.com **Author:** saella fitriana (Klout 36)

“ **After this last final is over, I'm going to start doing yoga again. I lost my abs. :(**

Link: <http://twitter.com/chseysindisguise/status/409861771739275264>

Site: twitter.com **Author:** Cheyanne Nicole (Klout 22)

“ **time to get back to my yoga today, cant go wedding dress shopping next month with the 19 pounds the holidays gave me as a gift lol setting the bar high on my weight loss goal for my new years resolution to get ready for the wedding...my goal 40 pounds lighter this year or a 9 in jeans!!!!**

Link: http://www.facebook.com/100005719478557_188520718015243


Site: facebook.com **Author:** Laura N Jason Messer

“ **The attitude of gratitude is the highest yoga. Yogi Bhanan**

Link: <http://twitter.com/featheredpipe/status/411389808939130880>

Site: twitter.com **Author:** Feathered Pipe (Klout 55)

Top Influencers

TOP 10 AUTHORS	 KLOUT SCORE
Huffington Post	99.0
Washington Post	98.0
Wall Street Journal	98.0
The Globe and Mail	96.0
The Boston Globe	96.0
Duke University	94.0
Western Australia	93.0
Joshilyn Jackson	93.0
VANITY FAIR	93.0
University of Iowa	91.0
Overall Average *	22.3

* This average represents all consumers with Klout scores who posted in this primary category.

KEY QUOTES

- “ Bikram Feels the Heat: Yoga guru Bikram Choudhurys journey from healer to alleged predator. <http://t.co/bCcsUvogHn>**
Link: <http://twitter.com/VanityFair/status/413677910638473216>
Site: twitter.com **Author:** VANITY FAIR (Klout 93)

- “ Lululemon actually ADMITS its PR disasters are hurting sales <http://t.co/0xcYE1hgVs>**
Link: <http://twitter.com/HuffingtonPost/status/411411433738756096>
Site: twitter.com **Author:** Huffington Post (Klout 99)

- “ Patent office approves patent for videotaping yoga classes <http://t.co/sLjyDym4uz>**
Link: <http://twitter.com/washingtonpost/status/411618180336201728>
Site: twitter.com **Author:** Washington Post (Klout 98)

- “ RT @OrthoZane: @PreventionMag and @DukeU find that yoga can treat chronic pain such as osteoarthritis. Read more in on our blog! <http://t.co/4XP8CmmCrn>**
Link: <http://twitter.com/DukeU/status/411311322329260032>
Site: twitter.com **Author:** Duke University (Klout 94)






- “ @sophiebiblio @quinncy "like all tiresome zealots, I long to convert you" is perfect. I am stealing it to say at parties about yoga.**
Link: <http://twitter.com/HarperCollins/status/411595304610172929>
Site: twitter.com **Author:** Joshilyn Jackson (Klout 93)

- “ An ancient form of Yoga has been found to be effective for pain, and even post-traumatic stress <http://t.co/i2Vg1g7A4I>**
Link: <http://twitter.com/BostonGlobe/status/412926640776577024>
Site: twitter.com **Author:** The Boston Globe (Klout 96)




Channel Signal tracks influence via a metric service called Klout, which measures one's number of followers and how often one's content is re-shared. The influencer chart above shows some of the most important voices to talk about yoga in December. Some, like the ones from Duke University and the Boston Globe, are references to yoga as a treatment for medical conditions. Others, from Huffington Post and Vanity Fair, talk about the problems with Lululemon and Bikram Choudhury.

Category Report

WHAT You Get:

-  A **large dataset** of consumer opinions
-  **Comparative analysis** of the top brands
-  The trending consumer **headlines**
-  Names and quotes from **key influencers**
-  A **monthly strategy call**

WHY It Matters:

-  See what's trending to **capitalize on opportunities**
-  Know about **product performance** before competitors
-  Get an **unbiased view** of consumer opinions

WHAT It Costs:

-  **Please call for details.**

What Is Channel Signal?

We collect and filter large amounts of consumer opinions and then analyze and provide insight into issues that are critical to brands, retailers, event organizers, associations and analysts.



Other Reports

Product Review Reports (\$1,000/mo.)

An analysis of consumer product reviews from your e-commerce partners. We break out your top positively and negatively reviewed products and detail unifying themes.



Brand Reports (\$1,500/mo.)

An analysis of your brand performance. We highlight the total volume, breakout the headlines, back them up with consumer quotes and reveal the top influencers.



Senior Management Reports (\$5,000/mo.)

A comprehensive review of everything consumers say about your company, including products, marketing initiatives and event sponsorships. Presented with headlines and analysis on each critical topic. Includes a Consumer Review Report.



Special Reports (Cost determined by scope)

A report based on your needs. It might be a competitor analysis, a review of a new product launch, or an analysis of consumer opinion on an event sponsorship.



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