



# Generation STREAM

## SPORTS EDITION

*Presented by Disney Advertising*





## Introduction to Generation Stream: Sports Edition

The world of sports continues to transform before our eyes. Over the past few years alone, stadiums hosted games without audiences, pregame tailgates expanded into at-home experiences, betting on games became commonplace and niche, and new sports came to the fore. Despite this period of disruption, viewers expanded their fandom and found new ways to engage with sports, athletes, leagues and one another. The driving factor behind these changes? Streaming. We explored this shift in **Generation Stream: Volume 1**, Hulu's foundational thought leadership study that took a deep dive into streaming attitudes and motivations, uncovered trends that could inform future behaviors, and ultimately revealed how to connect to streamers in meaningful ways with content, brands and advertising.

Disney Advertising is proud to extend its thought leadership initiative, Generation

Stream, into the realm of sports with **Generation Stream: Sports Edition**. This body of work explores the behaviors and motivations of sports streamers, who self-identify as sports fans, use streaming services to watch some or all of their sports content, and have watched a sporting event, sports highlight, and/or sports-related video within the past three months. The findings of Generation Stream: Sports Edition are captured in six chapters—*The Scorecard*, *Sports Unleashed*, *Complete Athlete*, *Digital Rituals*, *Outer Rings* and *Sports Fandom 360*—each uncovering distinct trends that inform the future of sports, fan-ship, and consumption.



## **The Scorecard**

*(Introductory Report)*

Page 5

A snapshot of sports streamers that ranges from how sports streamers are identifying with eSports to a deep dive into different ways people are extending their sports experience.



## **Sports Unleashed**

Page 16


Sports content is untethered from traditional formats, and fandom is evolving into a kaleidoscope of viewing experiences. With more access to sports through streaming, social media and podcasts, 'watching sports' has taken on new meanings—and embraces a more diverse audience in the process.



## **Complete Athlete**

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The image of athletes as superheroes is giving way to a more complete picture of who they are: complex human beings who are emotional, social, and multidimensional. The "Complete Athlete" is stepping off the sidelines to create a more culture-defining game.



## **Digital Rituals**

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Sports fandom is as evergreen as the rituals that surround it. While new digital rituals are evolving sports culture, they're not cannibalizing traditional experiences. Instead, they're supplementing old rituals and making the sports experience more diverse, and more fulfilling for the next generation of sports fans.



## **Outer Rings**

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Sports betting, fantasy sports and eSports once represented the outer rings of the industry, but today they are fast becoming new centers of the expanding sports universe, ushering in new, diverse fans that ultimately elevate the game.



## **Sports Fandom 360**

*(Segmentation Report)*

Page 67

Five emerging segments are shaping the future of sports streaming. As streaming unleashes more diverse sports experiences, audiences are regrouping into clusters of fandom. Each of these new clusters, or fan segments, tells a deeper story about the evolution of sports in an era of social media, social justice, social distancing, and more.

## Methodology

To explore Generation Stream: Sports Edition, Disney Advertising partnered with the generational research agency, Culture Co-op, and used the following combination of qualitative and quantitative research approaches:

**Trend Explorations:** Leveraged ESPN's sports research combined with Culture Co-op's existing generational and trend research to understand shifts in sports audiences and culture.

**Culturesetter Projects:** Two waves of in-depth projects about sports, culture and trends. Projects were conducted among 25 diverse sports "Culturesetters," a handpicked group of Gen Z, Millennial and Gen X individuals at the forefront of sports culture who stream some or all of their sports content.

**Expert Interviews:** A series of interviews with sports industry leaders, media executives and academics.

**Nationally Representative Survey:** A survey among 2,500-people, ages 13-to-54, that identify as sports streamers.

**Video Ethnographies:** Video interviews with five culturesetting sports streamers representative of diverse fan experiences.

## Defining Sports Streamers

Sports streamers are individuals who:

- Self-identify as sports fans
- Use streaming services to watch some or all of their sports content
- Have watched a live or non-live sports event, sports highlights and/or sports related videos within the past three months

**Read on for trends and insights about how to connect with the next generation of sports streamers.**





# THE SCORECARD

*The Scorecard* is an exploration of the trends that are defining the future of TV and sports, while keeping score on how sports fandom is evolving. This snapshot of sports streamers ranges from how they are identifying with eSports, to a deep dive into different ways people are extending their sports experience.

# Sports Go Deep

2020 recentered sports, as fans had to rethink tradition and adapt to the pandemic, protests, and social unrest. Not surprisingly, sports fans felt the impact: 86% of sports streamers say that the past few years changed the way they watched sports with more than one-third (34%) saying that the impact was significant. Furthermore, 67% of sports streamers say these changes will impact how they watch sports going forward. But more than just changing how they watched sports, the past year altered how they viewed the game.

Now, more than ever, sports' new focus is on humanity in addition to wins and losses. 71% of sports streamers say that the pandemic and protests of the past year have made athletes more relatable to them. **The result is a growing trend in humanizing sports, beginning with a more complete picture of athletes.** As testament to this shift, 85% of sports streamers say they enjoy content that humanizes players. Furthermore, 81% agree, "the mental and emotional wellness of players doesn't get much attention, but should"—a topic that is particularly timely as top athletes like Naomi Osaka and Simone Biles spoke up about the stigma around mental health in sports.

Part of this new, 360-degree appreciation of athletes includes understanding their perspectives. The racial reckonings and Black Lives Matter protests turned athletes into activists, and put sports leagues in a new spotlight. More than half of sports streamers (56%) say they are interested in the intersection of sports, race, social causes and activism, and 74% of sports streamers agree that leagues should give their owners and players greater space to voice support for social causes of their choosing.



74%

of sports streamers agree that the past year has made them more thoughtful about how sports, race and politics intersect.

Here's a picture of how sports streamers feel about athletes outside of their performance on the field:

81% like learning about who athletes are outside of sports

78% like athletes that are entrepreneurial

74% like it when players support social or political causes outside of their games

69% wish there was more storytelling in sports

63% are a fan of an athlete because they represent a race, gender, or sexuality they identify with

## Beyond the Big Four

The sports spectrum is broadening as streaming gives audiences access to new, niche and global sports. **88% of sports streamers are also tuning into the longtail of lesser-known sports.** Leading the pack in this shift is Gen Z, who is less likely than older generations to tune into 'the classics' (80% watch one or more Big Four sports vs. 86% of older generations).

This isn't to say the Big Four are no longer 'big', or that they've lost their youth appeal—sports like the NBA appeal across generations as does its college basketball counterpart. But **streaming is untethering sports from traditional viewing and, in doing so, creating a broader range of sports viewing experiences.**

# 68%

of sports streamers have become passionate about a sport they didn't have access to before streaming.

Gen Zs are **+95%** more likely to be fans of Anime sports than their Gen X counterparts.



## Sports Superfandom

The majority of sports streamers are Superfans who watch 20% more types of sports than fans in general, engage in more digital activities while watching the game (81% are doing at least one online activity while watching vs. 76% of other fans) and are more emotionally invested in the outcome: 63% say they are extremely (31%) or very (32%) invested in the outcome of games as compared to 46% of sports streamers overall. However, even among Superfans there's a pecking order, with some sports fans out-fanning others.

# 53%

of sports streamers are Superfans, ranking their passion for sports as an 8, 9 or 10 out of a possible 10.

Percentage of sports streamers who rank themselves as Superfans (8, 9, or 10 out of a possible 10 in their sports fandom):

1. **75%** ESPN SUBSCRIBERS
2. **74%** ESPN+ SUBSCRIBERS
3. **67%** HULU + LIVE TV SUBSCRIBERS

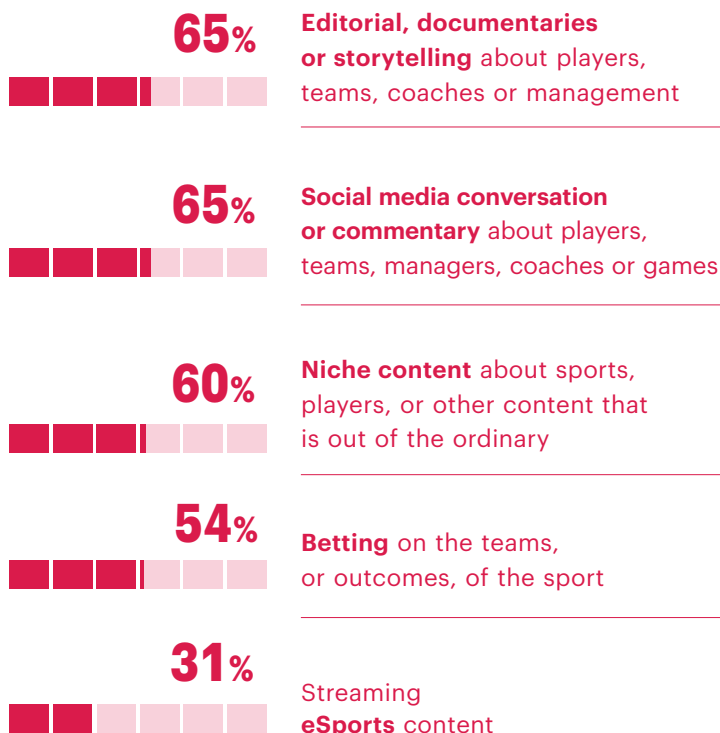
# Off Field

Matches and games have long been sports' big events—and they, along with the highlights and clips that replay them, are still the main draw. In the past three months, 62% of sports streamers have watched a live game and 49% have watched highlights and clips. But a growing number of fans are interested in content that is off of the traditional field, or are finding new ways to engage with the content that is on it.

**Nearly one-quarter of sports streamers (23%) have tuned into a sports podcast within the past three months and 35% are watching sports videos not related to a particular game,** such as training tutorials, MasterClass videos and athlete profiles. Hollywood is also playing a heavier hand in sports content with about one-third of sports streamers saying they've watched a sports TV series (32%) or documentary (31%) in the past three months. Furthermore, **fantasy leagues have continued to grow in popularity, the legalization of betting has rolled out across several states, and eSports has changed the definition of what is a sport altogether.**



Percentage of sports streamers who are interested in each type of content:



▶ **77%**

of sports streamers have streamed sports content *other* than games and matches in the past three months.



## Out of Bounds

It's official: fewer sports streamers are rooting for the home team. **Tipping the scales is Gen Z, a more geographically-agnostic generation who is spreading their wings to express sports fandom beyond their zip code. Gen Zs are about half as likely as older generations to say they are exclusive fans to the team closest to where they live now** (16% vs. 28% among Millennials and Gen Xers) and 38% more likely than older generations to say they are exclusive fans of a team that is not geographically close to them either now, nor previously in their life. Perhaps this is because Gen Zs are more likely than Millennials and Gen Xers to be fans of several teams, rather than exclusive fans of one, making regionality less of a factor. As fandom departs from the grid, sports communities are beginning to follow: nearly half (44%) of sports streamers who watch with a community say it's an online community rather than an in-person community (56%). **This geographic shift has created an entirely new set of sports rituals that help audiences express their love for the game no matter where they are.**

**59%** of sports streamers are fans of teams outside of where they live now or where they grew up versus 41% of those who say their fandom is still locally-based.

## Fewer “Me’s” in Team

Fewer sports streamers are personally identifying with sports teams, and more are simply following the sports they love. **44% of sports streamers say they watch sports because they love the sport versus 30% who say they watch because they follow a team.** Like the other trends we’ve tracked, there is a generational current driving this shift. One-quarter of Gen Zs (25%) report they watch sports because they follow a team as compared to one-third (33%) of both Millennials and Gen Xers. Among the Gen Zs who *do* follow teams, it’s the players rather than the region that draws them in (40% vs. 29% respectively), backing up Gen Zs’ more off-the-grid mentality. Notably, younger generations care far less about the team coach—18% of Gen Zs say it’s a reason they follow a team vs. 26% of Gen Xers—and more about the team culture, which comes in #2 on their list of why they follow a team as compared to #5 among older generations.

Sports streamers are **+47%** more likely to watch sports for the love of the sport versus the love of the team.

### TOP 10

REASONS SPORTS STREAMERS FOLLOW SPORTS:

1. **44%** **The sport:** I just generally love the sport
2. **36%** **The skills:** It's just fascinating to watch—I'm impressed with the sport
3. **30%** **The team:** I follow a specific team, or teams
4. **29%** **My family:** My family is interested in this sport, so I watch to connect with them
5. **28%** **The athletes:** I follow a specific athlete(s) I'm passionate about
6. **26%** **Personal experience:** I have played, coached or participated in this sport so I am passionate about it
7. **25%** **My friends:** My friends are interested in this sport, so I watch to connect with them
8. **19%** **The community of fans:** I am part of a community that follows this sport, so it's a social experience
9. **19%** **Escapism:** It just helps me relax, or escape my everyday life
10. **18%** **Pop culture:** I just like to stay up to speed on what's happening in this sport because it's part of pop culture



# Second Screening

When tuning into the game, sports streamers are more likely to be engaged in second screen activities as they are in other IRL activities. **Three-quarters of sports streamers are engaged in one or more second screen activities when they watch sports, from checking social media (41%) to shopping online (26%), as compared to 71% who say they are multitasking and socializing IRL.** And though it would make sense that the digitally native generation is driving this trend, that's not necessarily the case. While watching sports, Millennials are engaged in the most second screen activities across the board (79%) followed by Gen Zs (75%) and Gen Xers not trailing far behind (72%). Perhaps even more interesting, the youngest generation is slightly more likely than older generations to engage in real world activities, with cooking, eating and drinking topping their list.

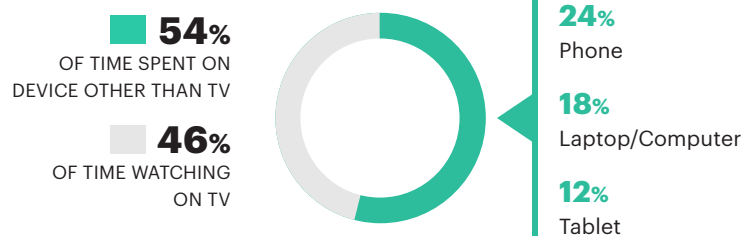
TV continues to be the dominant platform for consuming sports content across demos. However, screens, themselves, are tipping digital with Millennial and Gen Z sports streamers spending more time watching on phones, tablets and laptops.

# 76%

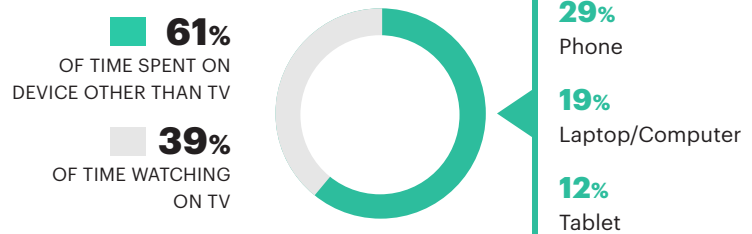
of sports streamers are engaged in one or more second screen activities when they watch sports.

## TIME SPENT CONSUMING SPORTS CONTENT ACROSS DEVICES

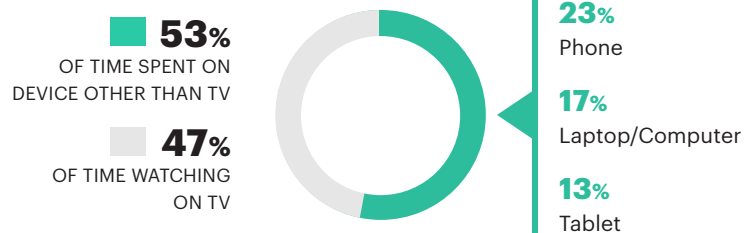
### Total Respondents



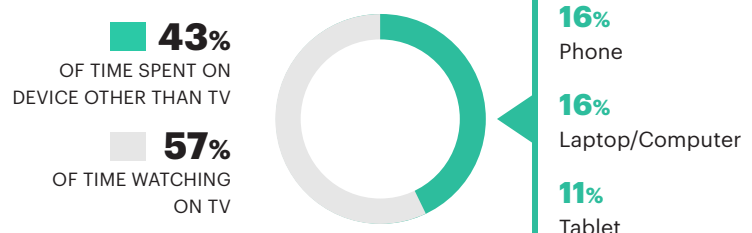
### Gen Z



### Millennials



### Gen X



# Social Gameplay

Instagram, Twitter, TikTok, Facebook and other social sites have amplified sports fandom from the ground up and completely changed the game of fandom. **88% of sports streamers watch sports related channels on social media, 85% follow a player or team on social, and 74% create or comment on sports-related content on social media sites.** In the past year, this burgeoning sports social club became a lifeline to fans who missed the camaraderie of in-person events, with 1-in-5 sports streamers saying that they built a stronger online community around sports, or engaged with more social media as a way to experience sports during the pandemic. More than just a quick fix for sports fans missing community during a year of distancing, social media delivers a range of benefits to fans, from serving up shorter-form content to helping them learn more about the sports they love.

## TOP 10

### BENEFITS OF SPORTS ON SOCIAL MEDIA

1. **29%** Highlights, clips & commentary
2. **28%** Convenience
3. **28%** Following favorite players
4. **26%** Learning about the sports
5. **25%** Freedom to be part of a community, but also be anonymous
6. **24%** Following conversations about players, teams and games
7. **23%** Being an active part of the sports conversation
8. **22%** Keeping up with sports stats
9. **19%** Finding other fans 'like me'
10. **17%** The authenticity of online communities



▶ **93%**

of sports streamers say social media benefits their sports viewing experience.

## Highlights on the Short Game

**One of the biggest trends shaping sports is the short game, or how highlights and clips have changed fans' sports experiences and the sports industry. But**

▶ **77%** of sports streamers say they enjoy watching highlights—the same percentage who say they enjoy watching the game from start to finish.

as much as sports streamers are tuning into social media and other sources to get the CliffNotes version of the game (see Social Gameplay), fans aren't necessarily swapping out the full game for the shorter version. Only 23% of sports streamers say they have made a ritual out of skipping the game and just watching the highlights. At first glance, preference for a shorter game seems to follow a generational arc, with 88% of Gen Xers appreciat-

ing the full game as compared to 82% of Millennials and just 67% of Gen Zs. But a closer look shows that older generations are interested in *all formats of sports*, a trend consistent with the fact that Gen Xers are more likely to qualify as Sports Superfans (64%). Further backing up the fact that younger generations aren't necessarily the ones who prefer highlights more, Gen Xers are more likely to say they like highlights and clips (84%) than are Millennials (80%) or Gen Zs (66%).



## Sports Brand Fans

Sports brands play a unique role in sports culture. **Three-quarters of sports streamers (76%) agree that sports brands are, culturally speaking, the most iconic brands out there**, with 74% saying that some of the first advertisements they remember are from sports brands. Sports brands are also favorite brands: 75% of sports streamers agree, “Sports brands are some of my favorite brands, so I don’t mind watching their advertisements.” There’s a cultural component to sports brands that adds to the atmosphere of the game in a way that is organic, nostalgic and appreciated. Furthermore, the relationship between brands and athletes is a symbiotic one: 67% of sports streamers like a brand specifically because their favorite athlete, or team, wears that brand and an equal 66% of sports streamers care about which athletes brands do, and don’t, sponsor.

▶ **78%**

of sports streamers say they made a sports-related purchase during the last season of their favorite sport.



### TOP 10 SPORTS-RELATED PURCHASES

1. **39%** Jerseys, hats, apparel & accessories
2. **31%** Sports video games
3. **23%** Sports memorabilia
4. **22%** Posters or banners
5. **20%** Car accessories
6. **20%** Pillows, blankets, home decor
7. **20%** Glassware, cups, mugs, shot glasses
8. **18%** Player photographs, signatures
9. **17%** Flash drives, pens, office supplies
10. **16%** Vinyl figure pops, bobbleheads



# SPORTS UNLEASHED

Sports content is untethered from traditional formats and fandom is evolving into a kaleidoscope of viewing experiences. Niche sports, global games and new viewing formats are ushering in a new generation of fans and opening up creative opportunities for the industry. At the same time, these shifts are fragmenting the viewer experience, making how fans tune into sports more bespoke than ever before. Welcome to the Wild West of next generation sports streaming.

▶ 69%

of sports streamers agree,  
“Streaming has changed the  
way I watch sports.”



Maya, a 15-year-old from Chico, CA, isn't your typical sports fan. Her passion for figure skating stems from her obsession with the Japanese sports anime series *Yuri on Ice*, which follows skaters Yuri K. and Yuri P. as they compete to win the Grand Prix championship. Praised for featuring a same-sex relationship and tackling timely topics like anxiety, *Yuri on Ice* is very Gen Z (i.e., complicated). Coupled with YouTube videos and social media, this series is how Maya learned the ins-and-outs of figure skating. “I finally figured out the scoring system,” she told us after revisiting past episodes and joining an anime-related group chat on Instagram. This group chat is also where she connects with others about *Haikyuu!!*, a volleyball manga series that evolved into an anime TV show. “I binge as much of the show as I can, until I can't keep my eyes open,” she admitted. During a typical binge session she sends *Haikyuu*-related memes to her group chat, gushes with friends about the characters over FaceTime, and immediately takes to social media. “Twitter, Tumblr, Instagram, and YouTube are all things I use to continue my experience. I watch live volleyball matches on YouTube, make posts, and ask people about their favorite matches, different arcs, and what they think of characters in the show.” Beyond *Haikyuu!!*, Maya also follows volleyball through global TV, like the Thai drama, *Project S: The Series*. “I watch a number of sports dramas from countries all over the world.” However, she isn't just another teen-on-a-screen—Maya is a bona fide sports fan and her passion for sports extends beyond digital. “My favorite way to engage in sports is to do them,” she told us.

# Debunking the Sports Demo

Maya probably isn't who the U.S. Figure Skating League or, more broadly, the sports industry has in mind when thinking about its audience. But as atypical as her fandom may seem, it's more the norm than not: **60% of sports fans say that they watch a niche or global sport that is out of the ordinary, or typically not watched in the U.S., and 73% of fans say that, because of streaming services, they watch more diverse sports than they did a few years ago.** Social media is also a big part of sports fans' sports viewing experience: 43% of sports fans spend more time watching sports with their social media community than they do with an in-person community (see side bar). Maya, and others like her, represent entirely new cohorts of sports fans that are fast becoming the future of the industry.



## THE IMPACT OF ONLINE SPORTS COMMUNITIES

Not surprisingly, online sports communities became lifelines for sports fans during the past two years. Among the 86% of sports fans who said the pandemic, protests and political upheaval impacted their sports viewing, 1-in-5 (21%) report having built a stronger online community around sports, with 58% of these respondents saying these stronger communities had the biggest impact on their sports viewing behavior during the past year. Backing up the importance of online sports communities, 56% of sports fans say they have a strong connection to an online sports community—nearly as many fans who say they have a strong connection to an in-person sports community (62%).

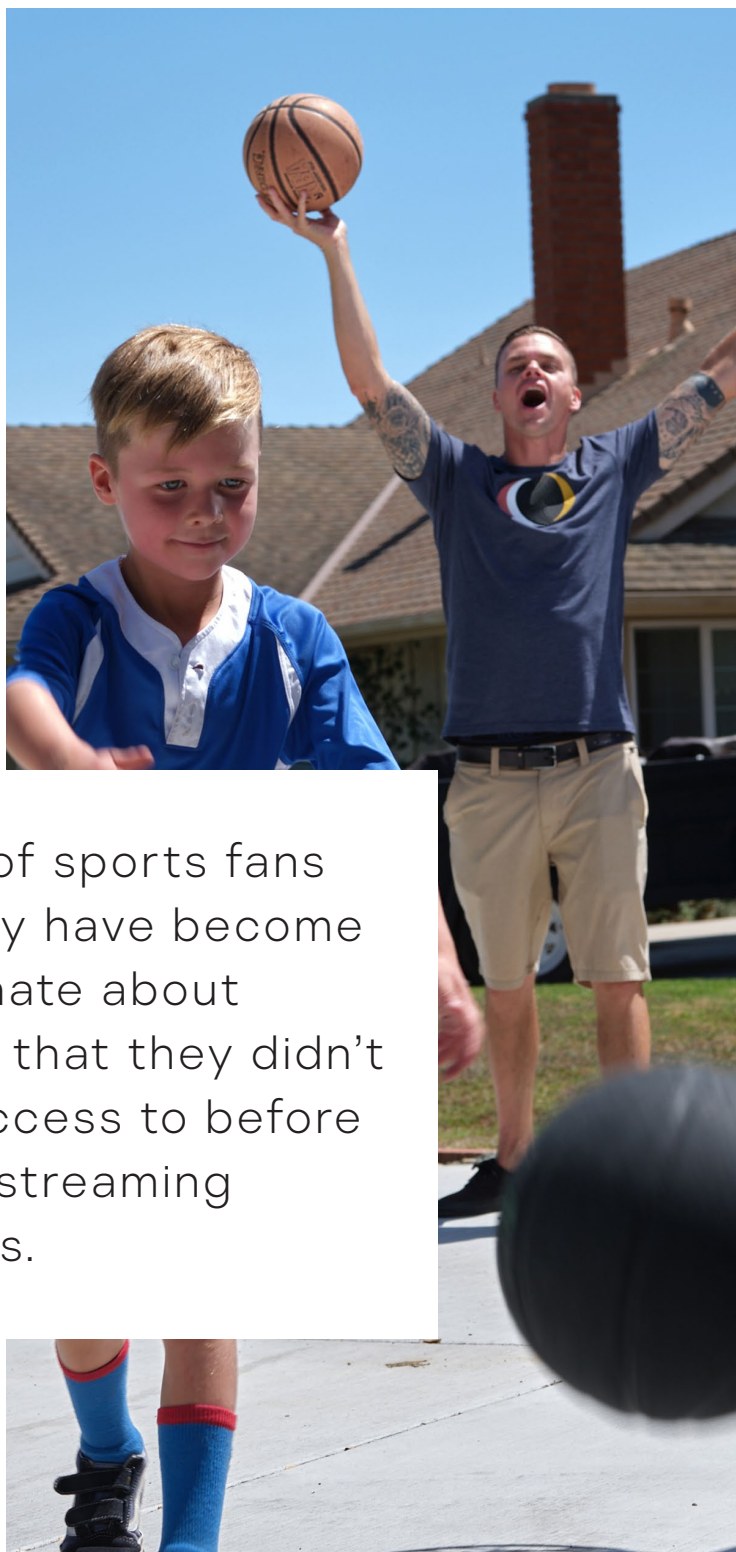
Furthermore, sports fans are watching in a number of ways: 64% binge sports content and one-in-five (19%) follow multiple games at once across various platforms and devices. In fact, young people are more likely than the previous generations to watch sports on a variety of platforms and devices. Additionally, 76% of fans are engaged in at least one digital activity while watching games, from checking social media or blogs to posting about what they are watching. **As more viewers access sports non-traditionally, even conventional sports fans are rethinking their experience.** Take, for instance, Ryan, a 39-year-old father of three from Chicago, IL, who is about as polar opposite from Maya as a sports fan can get. An avid Big Four follower, Ryan watches “a couple of hours of sports on TV every night” and, pre-pandemic, regularly went to games. He’s not part of the digitally native generation (“I don’t have Insta,” he offered up). He feels somewhat pigeonholed by traditional sports formats and wants to branch out. “I don’t know why we don’t see more options for viewing other sports, outside of the major sports such as baseball, football, basketball, hockey, golf, tennis, soccer and NASCAR,” he commented. “If I had a channel that I knew would broadcast some random or unusual sports, no matter the time of day, that would likely become my back-up option for when none of my typical sports or teams have a live broadcast going.”



# All Access

Of course, the sports industry has already branched out quite a bit from its network heyday when fans had to catch clips on the nightly news. Streaming and social media have made it possible for viewers to diverge from the Big Four and fandom is no longer tied to timetables or zip codes. “Sports has become wildly local and wildly global all at the same time,” Russell Wolff, Executive Vice President and General Manager of ESPN+ explained. “Fans want to watch what’s happening with their local team and watch Wimbledon.” As testament to this, his own teenage sons follow English football clubs, something Wolff couldn’t do when he was their age. “There was no access to those games back then.” Neal, 41, of Ventura, CA, reflected on trying to explain the power of on demand sports content to his kids. I told them, “When I was a kid, if I missed a game, that was it. I would never be able to see it again.” Not surprisingly to anyone who has explained the same thing to younger generations (population: parents 35+), Neal’s kids didn’t get it: “They looked at me blankly.” And while time shifting is pretty basic by now, it’s relatively novel for sports.

To meet the needs of the evolving fan, sports distributors have acted quickly. ESPN added a direct option to stream sports and made the leap to streaming with ESPN+ back in 2018 and, following in ESPN’s footsteps, NBCUniversal recently closed their NBC Sports Network making content available on its streaming network, Peacock. Notably, ESPN struck a ground-breaking, seven-year rights deal with the NHL to air 1,000 games formally on NHL.TV exclusively on ESPN+; and Amazon has secured the rights to Thursday Night Football for ten years beginning in 2023—a move that has been cited as a “tipping point” for sports streaming.



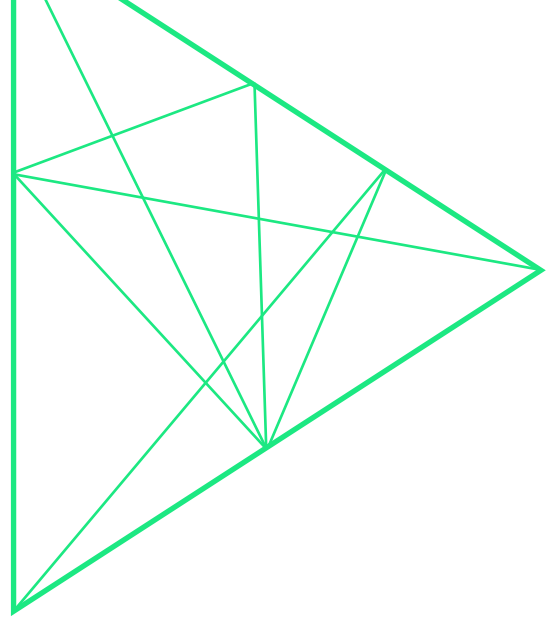
**68%** of sports fans say they have become passionate about a sport that they didn’t have access to before sports streaming services.

**Taken together, increased access to sports is bringing new fans into the game,** like Rose, 37, of San Antonio, TX. Similar to Maya, she represents the ‘typically atypical’ sports viewer. Rose’s favorite sport is fishing, which she discovered through noodling—bare hand catfishing practiced in the South. “I didn’t learn about this southern cultural sport from a sports program,” she explained. “I would have never discovered noodling if it wasn’t for documentaries and the Internet.” Podcasts are another go-to source for Rose to catch a different side of sports, naming *In a Skirt* and *Black Girls Talk Sports* among her favorites. “My perfect sports streaming program involves diverse perspectives.” For Rose, hearing sports commentary from a female or non-white POV is a major draw, and personally profound. “If it wasn’t for the internet giving a platform for sports podcasters and sports YouTubers, I don’t think I would have been given an opportunity for the growth I’ve had as a person.”



However, like Ryan, these new formats are only making Rose want to cast an even wider net. “Non-traditional sports need to have a bigger platform of visibility,” Rose told us, mentioning that she’d be interested in programs on adaptive, niche and international sports. We heard this cry for more—more sports, different sports and new formats—from almost every sports fan we spoke with. Jamael, 19, of Atlanta, GA, agrees. “Sports shows of today only speak on the same two popular sports which are basketball and football. The new generation of sports streaming should include the coverage of all sports in detail.”





That said, even the ‘usual suspects’ (i.e., the NBA and NFL) are reaching new demographics by offering broader access. Kyle, 31, of San Diego, CA, and father to a toddler, appreciated the NFL giving a nod to its smallest fanbase. For Kyle, experimentation by the NFL is a welcome change. “I thought what the NFL did last year broadcasting a game on Nickelodeon was genius. It was fun and catered to an audience—kids—that many broadcasts ignore. I think sports content providers should consider offering multiple viewing experiences for the same games—a traditional broadcast, a fantasy or gambling broadcast, and a fun kids-centered broadcast.” It’s this exact type of multi-experience approach that streaming services can uniquely unleash. Olivia Stomski, Director of Newhouse Sports Media Center at Syracuse University, sees the power of leveraging the same content across platforms to reach new audiences. “We may have an amazing six-minute feature on an athlete. Well, how do we use that on different platforms to reach new viewers?”



# The Short Game

While there is still a strong appetite for long-form content like games, films, and documentaries, social media offers a more snackable way to consume sports—and, as a result, is ushering in a younger generation of fans. The number one benefit of watching sports on social media, according to sports fans, is highlights and clips that help them “get to the good stuff quickly;” **In fact, as many Gen Z sports fans agree they like watching highlights (66%) as those who say they like watching the full game (66%),** illustrating just how powerful the short game has become. As an answer to this generational calling for quicker content to complement full games, Instagram recently launched Reels, a platform for creators to make 15, 30 or 60-second clips of content. While Reels is content agnostic, the sports industry is a key target. Since its launch last August, the MLB, NBA, NFL and NHL have all partnered with the platform. Furthermore, YouTube just launched an updated sports platform that helps fans stream clips, news, and trending videos quicker. And SportsCenter focused its efforts on Instagram in 2020 by recruiting House of Highlights founder, Omar Raja, to manage the show’s Instagram account and court younger audiences and a larger social following. The move worked: by the year’s end, SportsCenter’s Instagram account grew to 26.5M followers, with more than 40 posts garnering over 1M social engagements apiece and ESPN’s Instagram account shot up to 20.7M followers.

Furthermore, new, short-form sports platforms like Buzzer are also gaining, well, buzz in the industry. Buzzer gathers subscribers’ team and player preferences and sends push alerts to give sports fans simple access to memorable sports moments. This approach appeals to fans like Linnea, 43, of Spring Lake, NJ, who is actively looking for condensed content, such as



“every pitch of the Mets game with the rest of the game removed.” Or to Finn, 22, of Boulder, CO, who appreciates NFL’s RedZone because it “strips the mundane aspects of football away.” He describes the RedZone experience as an “eternal cliff of suspense and anticipation with the highest likelihood for scoring, excitement, adrenaline and endorphins.”

And then of course there’s TikTok, which is

planning to expand its short-form live sports streaming. Its partnership with the NFL for the Super Bowl this year—the “TikTok Tailgate,” which mixed game coverage with tailgate recipes, live streams of music acts, and content from creators and celebrities alongside NFL legends—was one of its most successful partnerships ever, according to the company. Forbes reported that TikTok, alongside other social platforms, drove a 483% YOY growth for the 2021 X Games; and according to our study, **37% of sports fans who create game-related content on social media share it on TikTok.** As much as social

media helps fans share sports content, it also introduces them to new sides of athletes and commentators. ESPN’s Tim Kurkjian, for example, recently busted a move with TikTok star JoJo Siwa, showing her 40 million fans that Tim can break out some sweet dance moves almost as well as he can break down a baseball game.

While TikTok is having a moment and, let’s

ESPN's TikTok, with 15.5M followers, reached **1B** likes this year, making it one of the most-liked brands on the platform.

be real, the social platform du jour will change, Stomski says it’s not about the platform; it’s about understanding the generation that’s on it. “They swipe as fast as they possibly can. You have to get them in 15 seconds,” she told us. “So now the sports industry is asking, ‘How do we get that 15? And once we get it, what do we do with it?’” She says this marks a paradigm shift in the industry, from building anticipation to jumping to the punchline. “We used to create stories by saying, ‘In a land, far, far away’ and then bring an audience through the entire story. Now we’re in a culture where we have to say, ‘He became king. This is how it happened.’”

According to Wolff, games have become shorter and the pace has become quicker to keep fans engaged. “Every league has focused on pace of play. That’s intentional. For example, the NHL changed the rules so that there’s limited time from when the whistle blows until the next puck gets dropped.” However, shorter attention spans don’t mean less consumption—just different consumption. For example, content is being watched in a variety of ways. Stomski notes, “In three hours, when we’ve watched one game, [my nephew] has seen highlights of 12 different games. He wants music. He wants tight shots. He wants the hard cuts. Streaming for him is about what happens quickly.” The point is that shorter content isn’t just broadening and diversifying the sports audience; it’s changing the game entirely.



# Kaleidoscope Sports

Because of new access points, social platforms and shorter formats, sports viewership has become a kaleidoscope of fan experiences. This isn't dissimilar to streaming's impact on entertainment overall; by now we all know it's hard to find shows that *everyone* watches (save for *Friends*, which has bucked that trend and somehow remains evergreen). But sports are different because, at the core, sports are arguably more about camaraderie than any other content. "The most important purpose of sports is to bring communities together," Rose told us. Solanchs, 28, of Miami, FL, agrees: "Sports streaming shouldn't just be about sitting down and watching a game. It should be centered around socializing with other people that are as tuned in as you. That's honestly the best part for me—talking to someone who is rooting for the other team, or with someone who has similar thoughts as me. Both of those occasions make viewing sports incredible." Sports fans agree: 62% feel a strong connection to an in-person sports-watching community and 56% feel strongly connected to a sports community online.

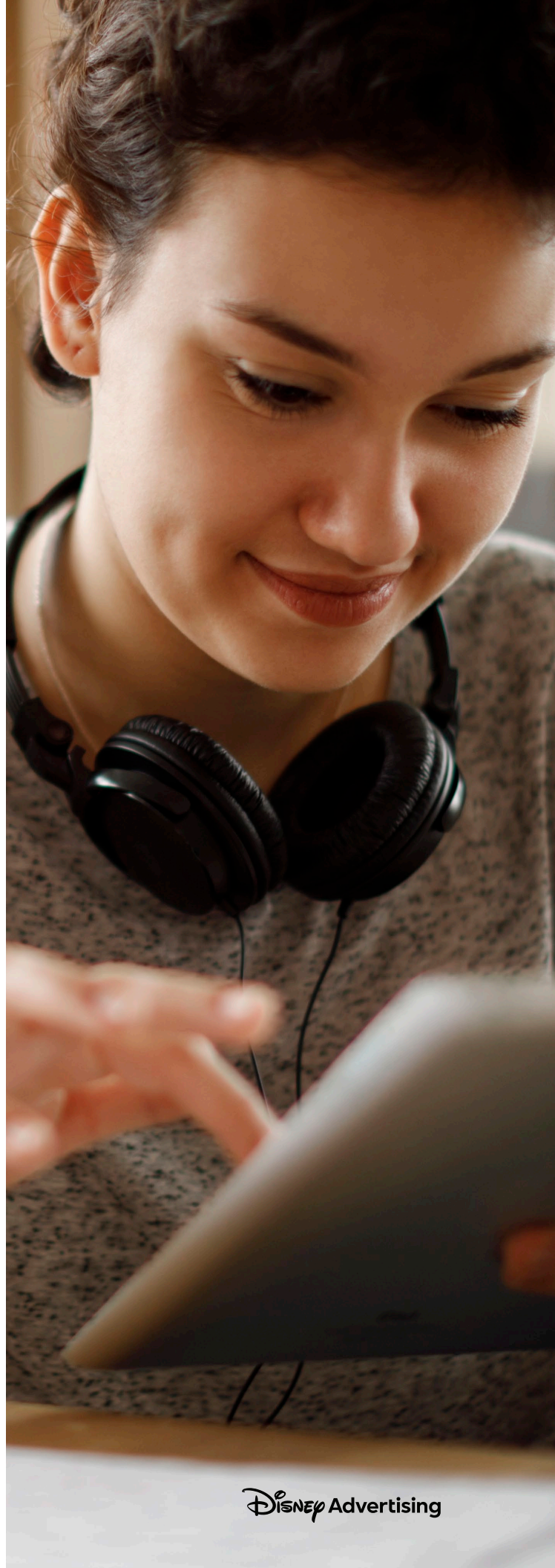
But coming together to watch the game isn't always seamless, which is frustrating for fans like Ryan. Because of local blackouts, the same platforms that are expanding his sports horizon are also cutting him off from his community. "My kids will grow up rooting for some team other than the Cubs, even though they're growing up walking distance from Wrigley field. We might get to a couple of games out there, but we'll be watching other teams every night on TV."



"There is nothing more frustrating than wanting to watch your favorite team and trying a million different ways to access the game. You need to have an engineering degree to try to figure out how to find some of your teams these days."

—Erica, 47, New York, NY

To use a sports cliché, sports streaming still has a few hurdles to overcome. However, it's also impressive to see just how much the experience has evolved, and how streaming platforms are stepping up to make accessing sports even more turn-key. Case in point: Hulu announced that the NFL Network is now available to all of Hulu's Live TV subscribers as part of their core subscription plan. **With more access to sports through streaming, social media and podcasts, and an ever-growing library of different formats, 'watching sports' has taken on new meaning—and embraced a more diverse audience in the process.** Back to Maya, the ask is this: "If a sports streaming service offered short-attention-span-friendly, plot-driven content divided into animated and live-action categories, I would be set for a very long time." Sure, it's a tall order, but with sports unleashed, the possibilities are endless.



# SPORTS UNLEASHED BRAND TAKEAWAYS



**Rethink the people who comprise the sports demographic.**

Having access to new, niche and global content is opening up sports to broader audiences who are looking for alternative sports, new formats, and multiple viewing experiences.



**Highlights and clips are changing how fans watch sports.**

In addition to an expectation to catch the best moments quickly, fans are looking for more curated sports viewing experiences that allow them to follow one athlete, or just watch specific plays across various games.



**Social media is rebuilding the sports experience from the ground up.**

New voices, diverse points of view and collective fan feedback are changing the top-down sportscaster model into a sports experience that is more diverse, inclusive and multifaceted.



# COMPLETE ATHLETE

The image of athletes as superheroes is giving way to a more complete picture of who they are: complex human beings who are emotional, social and multidimensional. This humanization of athletes marks a shift in sports from scorekeeping to storytelling, ushering in a new generation of more diverse sports fans and a deeper narrative into America's quintessential pastime. Meet the "Complete Athlete," who is stepping off of the sidelines to create a more culture-defining game.

“The storytelling and the personalization - the humanizing of players - is what fans want.”

- Kati Fernandez,  
Director, Content Development & Integration,  
ESPN+ / ESPN

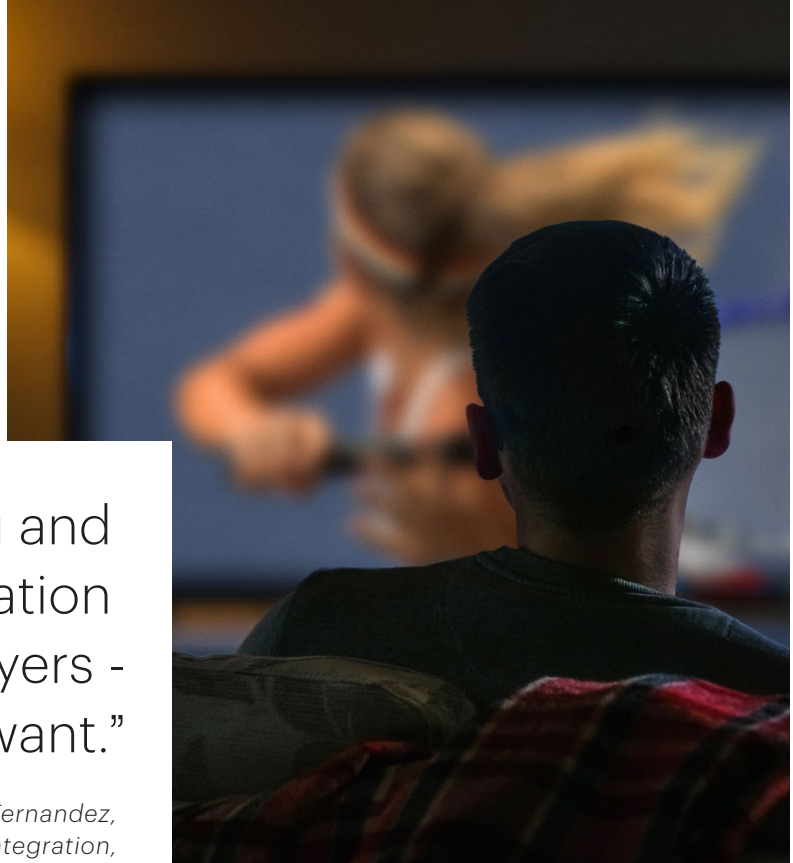
When Naomi Osaka dropped out of the French Open in the spring of 2021 citing mental health concerns, it was a watershed moment in sports: Osaka opened up arguably the largest and most public dialogue about the mental health of athletes. As a Japanese-Haitian woman who grew up in America in a predominantly white sport, Osaka represented the intersectionality of mental health, gender dynamics and racism—key social issues changing the sports industry and athletes’ role in it. Brand sponsors hailed her honesty (Nike, sweetgreen) and stepped in to pay her fines (The Calm App), while fellow athletes tweeted their support. Within days, the *New York Times*, *Washington Post*, *Time*, *NPR*, *Forbes*—the list goes on—published stories about her positive impact on the mental health movement. Michael Phelps, who has been vocal about his depression, went as far as to say, “This will 100% save somebody’s life.” And it just may have. When fan favorite Simone Biles shocked the sports world by withdrawing from several events at the Tokyo Olympic Games saying her mental health was impacting her physical safety, it’s hard not to wonder whether Osaka’s bravery in addressing her own mental health concerns paved the way for Biles to do the same.



69%

of sports fans agree with Fernandez, saying:

“I wish there was more storytelling in sports—there’s too much focus on the game and not enough focus on the stories surrounding athletes, teams, and sports culture.”



Beyond challenging the taboo of mental health in sports, Osaka's and Biles's openness about their mental wellness gave a nod to how they and other athletes, like the rest of us, struggle—physically, emotionally and socially. And while the fact that athletes are “human, too” should be a no-brainer, historically speaking this hasn't always been the case. Take, for instance, Evel Knievel, who in an interview with *Vanity Fair*, once reflected, “All my life, people have been waiting around to watch me die.” More recently, Colin Kaepernick became an icon for social justice, calling attention to racial inequality in 2016 by taking a knee during the national anthem. Since opting out of his contract at the end of that season, he hasn't had a job offer from the NFL. And when LeBron James spoke up in a 2018 interview about racism and the Trump administration, news host Laura Ingraham commented that he should “shut up and dribble.” The point is that athletes, more so than other public figures, have traditionally been expected to play one role only: *player*.

But a sea of change in sports is underway. **Fans are no longer satisfied with only knowing players on the field—they also want to understand who they are off the field.** This shift isn't just marking a more holistic appreciation for athletes; it's opening up the world of sports to new formats, narratives and, ultimately, audiences.



“Sometimes I think that teams are looking for what they can get from a player instead of how they can help a player. It's a shift of mindset but it would be rad to see.”

- Neal, 41, Ventura, CA



## Athletes to Activists

This new, 360 view of athletes can be credited in part to a time defined by recognizing difference and embracing empathy. The pandemic, racial reckonings and social issues of 2020 and 2021 had a democratizing effect on culture, with “We’re all in this together” becoming the catchphrase of the times. Athletes were stopped in their tracks and training as the world shut down. Just like us, they processed the fear, isolation, and grief of the pandemic and came together to push for justice. With games canceled and seasons postponed, fans followed their favorite athletes as people rather than players.

The pandemic brought about a perception-changing moment for Ava, 19, of New York, NY. “While I’ve always followed my favorite athletes and enjoyed watching interviews just as much as the competitions themselves, I admit to thinking of them more as athletes than as people,” she told us. “When the pandemic hit, most of these athletes couldn’t train normally, and I watched their journeys on social media with more empathy and interest than I ever had before.” In keeping with this sentiment, **71% of sports fans say the pandemic and protests of the past year have made athletes more relatable to them.** For Ava, this relatability was as humanizing as it was healing. “As an aerialist who also couldn’t train with the intensity and structure that I was used to, it was extremely beneficial to my mental health to watch many of my role models go through similar struggles.”

▶ **74%**

of sports fans agree:

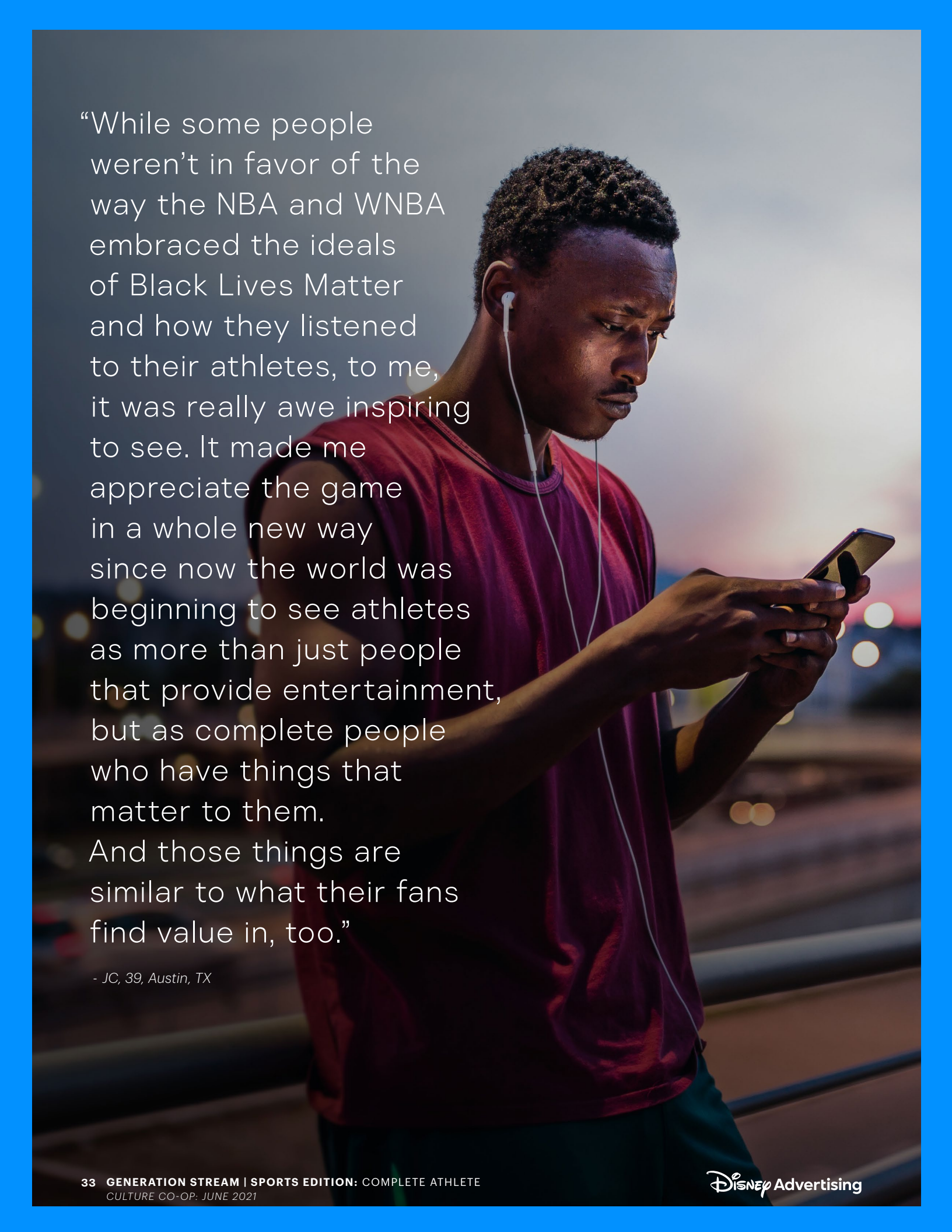
“The past year has made me more thoughtful about how sports, race and politics intersect.”

These struggles, of course, extend beyond the pandemic. In 2018, the #MeToo movement opened up dialogue about gender inequities in sports—Why was Serena Williams reprimanded for her “outburst” on the court while scores of men (cue John McEnroe) have been applauded for doing the same?—and, in 2020, the Black Lives Matter protests galvanized players to speak out about racial injustice. Seemingly overnight, athletes and athletic organizations stepped off the political sidelines en masse and into the activism spotlight. The MLB relocated the All-Star Game over the controversial Georgia election law; the Cleveland Indians and Washington Redskins changed their names; the NBA and WNBA boycotted games and made Black Lives Matter visible on courts, jerseys and pins; and Kevin Love and Hayden Hurst, among many others, spoke up about mental health. It was a year where fans had no choice but to see athletes anew.

“Younger fans want to marry their sports fandom to match their real life. Now, more than ever, people are invested in cultural moments.”

- Kati Fernandez,  
Director, Content Development & Integration,  
ESPN+ / ESPN





“While some people weren’t in favor of the way the NBA and WNBA embraced the ideals of Black Lives Matter and how they listened to their athletes, to me, it was really awe inspiring to see. It made me appreciate the game in a whole new way since now the world was beginning to see athletes as more than just people that provide entertainment, but as complete people who have things that matter to them. And those things are similar to what their fans find value in, too.”

- JC, 39, Austin, TX



While some have voiced frustration over players advocating for social causes outside of sports, for most, the change has been a welcomed one. Erica, 47, of New York, NY, saw the past year of sports as a teaching moment for her kids. “Last year, we streamed more sports as a family, which offered us the chance to talk about the issues happening in current events like the protests, which were showing up in sports,” she explained. “It was interesting and helpful from a parenting perspective. Those are hard topics to address and the fact that they surfaced during shared experiences of sports viewing made them timely and situational. Therefore, they were easier to talk about.” Drayson, 40, of the Bronx, NY, also sees players’ political turn as a positive one. “Some may say that the sports industry and players should stray away from controversial political issues, but I disagree. I believe what they are doing is long overdue and it will bring about a positive change.”

The events of the 2020 and 2021 were certainly catalysts for athlete activism, but it’s unlikely players will step back into the position of “just dribbling” anytime soon. As *The Atlantic* noted, “The atmosphere in sports has changed. Athletes have shown that they feel a purpose beyond just providing entertainment for legions of fans.”

## Entertainers to Entrepreneurs

**In addition to ‘activist’, athletes are adding ‘entrepreneur’ to their personality repertoire.**

Athletes have long parlayed their sports career into business endeavors: Tom Brady recently announced the launch of his non-fungible token (NFT) company, “Autograph”, and who can forget the George Foreman Grill of mid-nineties fame? But one of the more talked about entrepreneurial turned athletes that people are eyeing is that of the team owner. Players know that the best way to change the gender and race inequalities they are fighting for in culture and in sports is by becoming team and league decision makers. However, this is a role that people of color have historically not held. “When do we become team owners? When do we become the commissioners?” is something the late David Williams II, the SEC’s first Black athletic director, was asked in 2018 during “Dear Black Athlete,” a series of conversations about race and sports aired on ESPN. Unfortunately, his question is as relevant now as it was then. To date, there is only one principal Black owner in the NFL, NBA and MLB (none other than the legendary Michael Jordan), and across the big four (adding the NHL to the mix) there are only nine female owners out of one-hundred-and-thirty-three. “We are told we can only entertain,” Chris Archer of the Tampa Bay Rays noted during the same series Williams spoke at. “But every team has doctors, lawyers, economists,” roles Archer advocated young sports fans of color should aspire to, as well.



**This gap between who is on the field and who’s calling the shots off of it is a particularly glaring one for Gen Z, the most racially and culturally diverse generation to date.**

As Jamael, 19, of Atlanta, GA, noted, “In sports, people of color are often the majority of the player base but little to none are owners. This has been the case over every decade of modern sports.” However, the past few years may just change that. The recent advocacy for Black-owned brands, banks and economies as a way to fight racial injustice from the top down has had an impact across industries, including sports. Notably, LeBron James recently championed Renee Montgomery to pursue ownership of the Atlanta Dream as a way to further the Black Lives Matter movement; and Serena Williams and Naomi Osaka have both signed on as owners of the National Women’s Soccer League in a move to influence pay equity in women’s soccer. As more athletes likely follow suit, the sports narrative will inevitably change. As the *New York Times* pointed out, “Would the NFL have blackballed Colin Kaepernick if a significant number of former Black players were at the owners’ table? Unlikely.”



Beyond the impact that athletes-turned-owners are having on gender and race dynamics in sports, athletes-turned-media moguls is another way that players are beginning to insert their personalities and POVs into the game. Podcasting is leading the way. In the article, *"The Rise of the Athlete Podcaster,"* the *New Yorker* points out that, in the past, if athletes wanted to speak candidly about their experience or points of view, they'd have to write a tell-all book, do a sit-down interview, or land a network job. Today, athletes have found their voice on podcasts such as wrestler Chris Jericho's *"Talk Is Jericho,"* boxing legend Mike Tyson's *"Hotboxin',"* and Ringer, a network of sports podcasts that elevated athletes' voices—and was acquired by Spotify for a cool two-hundred million last year. As Jamael sees it, "My ideal reporter is one who played the game they comment on. A network for players by players would add key aspects of the game that most people don't currently see." For Jamael, podcasting is a step in the right direction. "I enjoy podcasts like *ALL THE SMOKE* and *I AM AN ATHLETE* because they show the side of the player that often gets misconstrued and misjudged by the media." Backing this up, 60% of sports fans listen to sports podcasts weekly during the season of their favorite sport, with one-quarter reporting that they tune into them daily.

Finally, and notably, the NCAA ruled this year that college athletes can now profit off of their "NIL," or name, image and likeness, giving young players the ability to monetize their talents without giving up their university scholarships, stipends or status. This opens up a floodgate of new, entrepreneurial opportunities for athletes, from sponsoring videos on social media to upstarting summer camps. The benefits for college football and college basketball players are a no-brainer, but the new legislation will also give a major boost to athletes in lesser-followed college sports who, nonetheless, have garnered national attention. Take, for instance, gymnast Katelyn Ohashi, who raked up nearly 200 million views and the nickname "Perfect 10" for her Tina Turner-and-Beyoncé-jamming floor routine, but who had to turn down endorsement deals because of her UCLA team status. This law could have changed her career trajectory entirely, like it has for volleyball sensations Haley and Hanna Cavinder of Fresno State. With this new ruling, the sister duo leveraged their 3+ million TikTok followers and 250+ million Instagram followers to score endorsement deals with Boost Mobile and Six Star Nutrition.

## Players to Protagonists

The rise of multidimensional athletes is also being driven by fans who want to know players simply as people, regardless of whether they are championing a cause, running a team or hosting a podcast. **69% of sports fans—particularly Millennial sports fans (74%)—wish there was more storytelling in sports, saying there's too much focus on the game and not enough focus on the stories surrounding athletes, teams, and sports culture.** “I personally enjoy the human stories of the players and the storylines of rivalries and adversity almost as much as the actual game playing itself,” Danielle, 37, of Brooklyn, NY, told us. “My husband and I have a joke that if he wants me to get into a game or a match to watch with him, he has to first tell me about the players' personal lives.” It's this context Danielle says that often persuades her to root for or against certain players and teams. “Learning about Knicks player Reggie Bullock's sister's murder and his subsequent activism in the LGBTQIA+ world has been a huge point of interest for me,” she explained. “My emotional connection to him as a player is stronger when I watch games.”



“Sports can be an amazing window into larger cultural challenges and shifts. *30 for 30* does a wonderful job of dropping you into what may seem like a small sports moment and expanding outward to discuss the cultural and social issues of the time. Race and class struggles, mental health issues, justice system failings, crime, violence, drug and addiction problems, even war and elections and complicated international affairs—all can be shown through the lens of sports storytelling.”

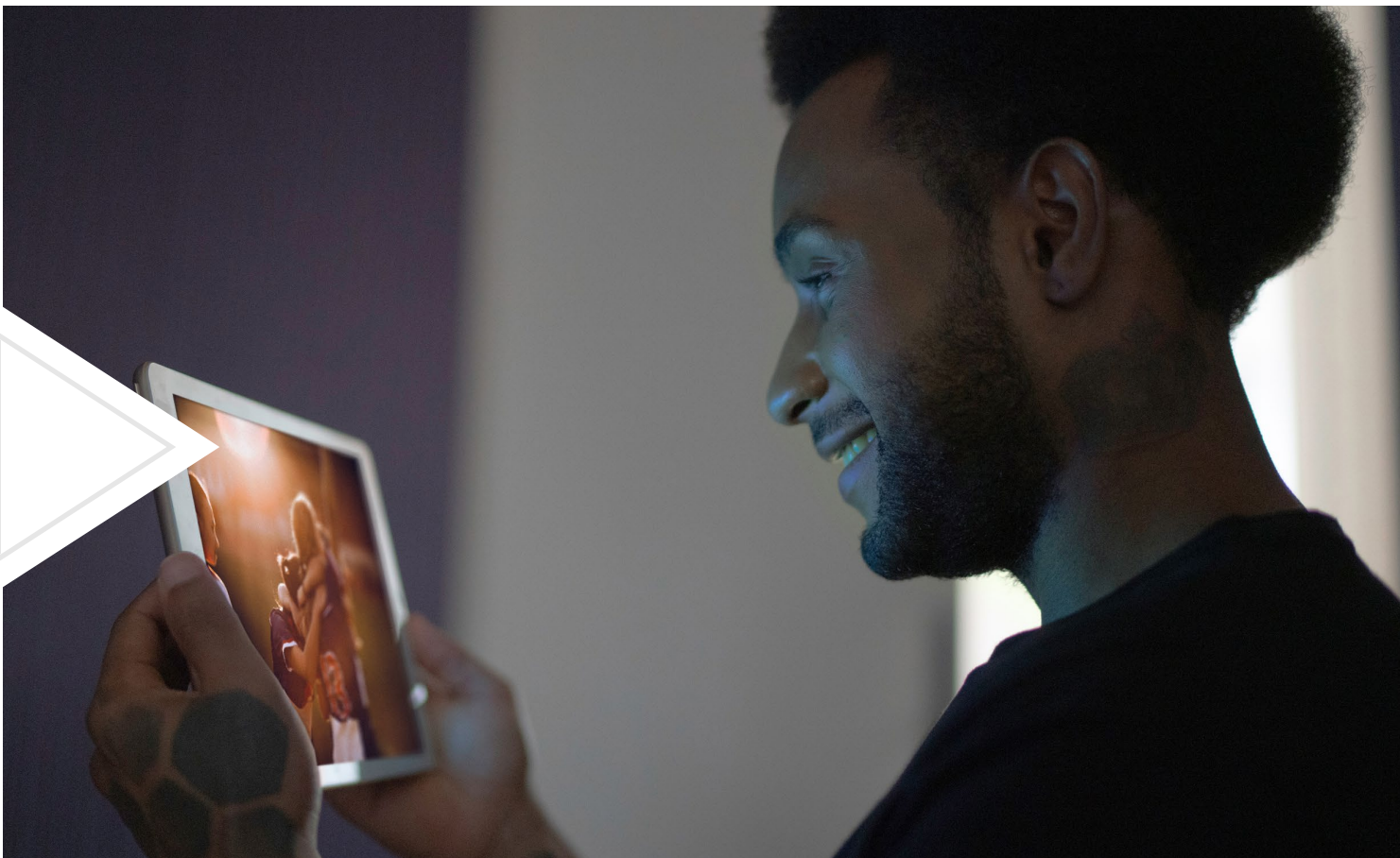
- Danielle, 37, Brooklyn, NY



This desire for a narrative where players are protagonists of a story that extends well beyond the game is an expectation among Gen Z, who have grown up watching content with complicated characters and storylines that push boundaries and challenge traditional formats. Furthermore, Zs are accustomed to diving deeper into celebrities' personal lives through social media; so for them, what happens to athletes on the field is really only half the story. For Maya, 15, of Chico, CA, the back-story is a must. "I, personally, cannot sit through sports where I have no idea who the players are behind the scenes. I need there to be a story to everything, and a good one at that, to feel any kind of emotion." Sports fans are looking for more. "I think that once you're used to something, you're used to it. And I think that for so long, we didn't even notice that we were seeing the same formats in sports," Olivia Stomski, Director of Newhouse Sports Media Center at Syracuse University, explained. But she feels

the sports industry is beginning to wake up. "We're starting to see executives at sports networks saying, "Hey, we need to do something. We need to look at our viewers and our fans holistically. It's important for us to serve those fans and our viewers in a way that includes them."

One way to do this is by showcasing more diverse voices and more "complete athlete" stories, something that women, POC and the LGBTQIA+ community, in particular, are clamoring for. "I love seeing Black anglers, women anglers, and females sharing their passion for sports," Rose a 37-year old Mexican-American from San Antonio, TX, who identifies as queer, told us. "I've been told fishing isn't a real sport, and I've had to do my own research to discover alternative sports. In my opinion the sports industry hasn't done a great job of catering to diverse interests or demographics. These marginalized communities exist and need to be represented." Ava agrees. "Growing up with many of my friends watching major sports





“I think sports programs could be more culturally inclusive. The most important purpose of sports is to bring communities together and to teach individuals acceptance and overcome differences.”

- Rose, 37, San Antonio, TX

networks, as well as my parents, it was intimidating and confusing to me that women’s sports seemed less desirable in the media,” she reflected. But Ava also pointed out that streaming services are in the “perfect position to change this narrative” by swapping out traditional protagonists and flipping the sports script. This move could be a lucrative one according to research from the Sports Innovation Lab, which analyzed billions of social media and

TV data points from more than three million households to track what fans bought, bet, created and streamed. They found that fans of women’s sports are the most likely to be part of a cohort that consumes sports digitally and socially with an emphasis on storytelling and athlete-driven stories. While this group makes up just 10% of sports fans, they account for more than half of total sports revenue.

Furthermore, athletes are flipping the script for the industry. Recently, Japanese soccer star Kumi Yokoyama came out as transgender, becoming the most high-profile Japanese athlete to ever do so. Yokoyama cited OL

Reign midfielder Quinn’s decision to come out as transgender in 2020 as inspiration. “Lately the word ‘LGBTQ’ has become more commonly known in Japan and been covered by the media, but people in my position aren’t able to raise our voices and talk about it,” she explained. “But if all of us speak up together then we can help raise awareness.” Yokoyama and Quinn join the ranks of a burgeoning LGBTQIA+ community in sports, including Megan Rapinoe, Ryan Russell, Patricio Manuel, Jason Paul Collins, Fallon Fox and Danell Leyva, among many others.

With more star players representing these marginalized groups, narratives are organically changing. Fans, particularly those of the next generation, are all for more diversity in sports: 63% of sports fans are a fan of an athlete because they represent a race, gender, or sexuality they identify with and 65% agree that transgender girls and women should be able to compete in women's sports.

More than just evening out the gender divide, or representing marginalized communities, changing the narrative in sports means showcasing athletes—all athletes—for who they are alongside how they play. This is perhaps why Coco Gauff was deemed “the next generation’s sports star” by New Balance. The brand isn’t concerned with whether or not Gauff wins or loses but, instead, focused on her as a leader—on and off of the court. “She’s not just here to climb the rankings,” New Balance stated. “She’s here to lead the next generation.”

Ultimately, the payoff of humanizing players and featuring more “complete athletes” is not only a more interesting narrative, but also a broader and more diverse fanbase. “We all love stories,” Stomski pointed out. “As human beings, we’re told stories as kids, we’re told stories as old people, we grow up and tell our own stories. Sports fans love the stories attached to sports. Streaming companies can uniquely dive into the storytelling aspect of sports and create an entirely new audience, if just given the chance.”



“I think the Drew Robinson story is a great example of what I feel like viewers want. It’s a story that shows somebody for who they are outside of the accolades. **So many times, we glorify athletes, but the truth is, they are human.**”

- Kati Fernandez, Director,  
Content Development & Integration,  
ESPN+ / ESPN

# COMPLETE ATHLETE BRAND TAKEAWAYS



For sports fans today, who a player is off of the field is as important, *if not more important*, than how they perform on the field.

Align your brands with athletes who are multidimensional, meaningful and relatable.



Storytelling is weaving its way into sports.

Documentaries, podcasts and TV series that provide an in-depth look at an athlete or sporting event will resonate with a generation who is looking for a more complete picture of sports and how it intersects with culture.



Activism in athletics is here to stay.

Brands have the power to amplify players' voices and the causes they care about.



# DIGITAL RITUALS

Sports fandom is as evergreen as the rituals that surround it. Game Day chili, stadium soundtracks, and pregame tailgates are as familiar today as they were three generations back. However, as the digital world expands the sports experience, new rituals are naturally coming into play. From collecting NFTs to commenting on Instagram and postgaming with podcasts, a new wave of digital rituals is quickly becoming the sports ceremonies of next generation fans.



## Virtual Tailgating



Call it a product of the pandemic, the rise of the digitally native generation: tailgating is slowly moving off the grid. As the country socially distanced during the pandemic, tailgating came to a temporary halt, leaving fans at a loss for where they'd grill-and-gather before the game. "Things have definitely changed for me and for everyone else in the last year," Solanchs, 28, of Miami, FL told us. "There were no sports when the pandemic started, but then sports picked back up and I had to find a new way to experience the game." Enter Zoom, the video conferencing app that just keeps on giving. In April 2020, Penn State held its Blue-White Virtual Tailgate that inspired 700 tailgates with 8,000 participants spanning from Happy Valley, PA to Mumbai, India. Texas followed suit with its own version, "My Texas Tailgate," as did Colorado State, University of Alabama, and many others. The virtual tailgating trend leaped to the big leagues with the NFL in the fall and winter, culminating in TikTok's two-hour Super Bowl Virtual Tailgate, complete with cooking tutorials, special NFL guests and a live halftime show headlined by Miley Cyrus. Brands includ-

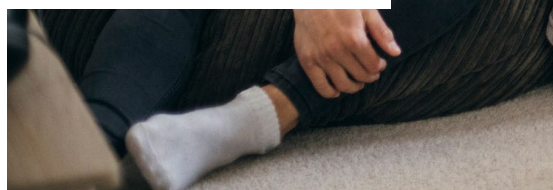
ing Corona, Frank's RedHot and Pepsi also got in on the (virtual) party, delivering the tailgate experience to fans' doorsteps. Pepsi's "Tailgate in a Box" featured \$5,000 of pre-and-post-game party necessities, such as an outdoor projector, cornhole sets and, of course, lots of Pepsi.

Tailgates are grassroots at the core and don't need musical acts and free merch to deliver on what sports fans are really looking for: camaraderie. Fans like Solanchs, for example, launched their own DIY digital get-togethers during the pandemic. "A lot of my friends are far away, so we'll have special nights for boxing where we share screens, see each other and feel like we're all in that arena together," she explained. "We're able to have conversations and see each other's reactions. It's super fun when we pick different fighters that we are rooting for." **In total, 16% of sports fans participated in a virtual tailgate during the pandemic with the youngest generation of fans—Gen Z—not surprisingly leading the charge: 1-in-5 Gen Zs tailgated virtually in the past year.**

▶ 95%

of sports streamers have developed at least one new 'digital ritual' around their sports fandom, from following athletes on social media to creating pregame podcasts.

While the digital version of this tradition doesn't deliver on every aspect of the real thing, there are some unique perks that will likely have fans tailgating virtually, for years to come. For one, access. People who can't be at the game IRL can now feel like they are part of the action. Erica, 47, of New York, NY, is happy to avoid the "throngs of people" at sporting events; for her, tailgating at a digital distance is a plus. In keeping with this, one-quarter of sports fans say a benefit of experiencing sports on social media is being able to be part of a community while also avoiding the crowds. Furthermore, virtual tailgates have given fans access to new experiences, like meeting their favorite coaches and players. Penn State's Blue-White Virtual Tailgate raffled off chances for fans to meet Penn State football coaching staff, former athletes and the Nittany Lion mascot face-to-face (or, in this case, screen-to-screen). In essence, virtual tailgating isn't just about digitizing the party—it's about opening up the invites.





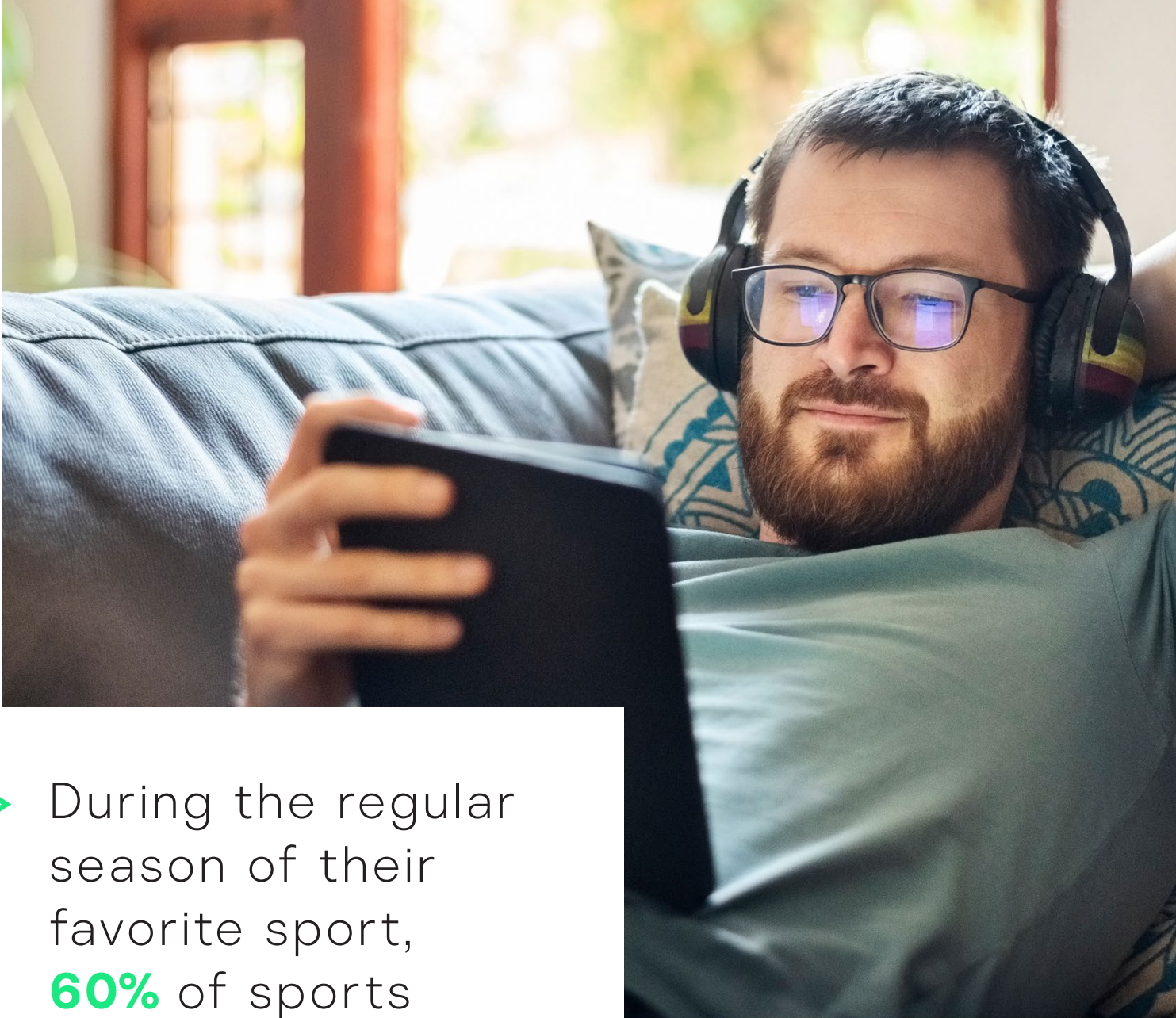
## Audio Play

The past year or so may have muted some Game Day energy, but athletes and fans still rocked on. Spotify launched Daily Sports, a mixed media playlist that combines a curated selection of sports podcasts and commentary with personalized playlists. This comes on the heels of ESPN's Hype Hits, which brings the soundtrack of locker rooms, stadiums, and buses to athletes and fans so they can get hyped, as the name implies. And adding to the play-by-playlist mix is Pandora's and SiriusXM's UNINTERRUPTED Radio, an "athlete empowerment brand" launched by LeBron James and Maverick Carter, which features the music NBA and WNBA players listen to on and off the court. The station includes pregame and postgame playlists with music selected by Megan Thee Stallion, Pop Smoke, and Summer Walker, among others, as well as the aptly-named "Vet Mode" playlist with throwback faves from Jay-Z, Tupac and Notorious B.I.G.—basically a best-hits of 90s hip hop.

Of course, audio and sports have long gone hand-in-hand. Sporty Spice was a 90s icon; the Sony Sports Walkman single-handedly defined exercise culture in the 80s; and Queen's 70s stadium anthem 'We Will Rock You' still rocks stadiums half a century later. But audio has become even more integral to sports as athletes and spectators have had to compensate for the energy of fan-filled stadiums and gameday get-togethers during social distancing. Rose, 37, of San Antonio, TX, reflected, "As a child growing up in the 90s, I remember the NFL Superbowl, NBA Championship, the Olympics, and the US Open being a really big deal. Cheering, drinking, and socializing was a way for me to be vulnerable and express emotions with a community." But for Rose, like the rest of us, fandom had to be reinvented last year. "The pandemic has taken that



experience away from me and has forced me to find new ways of experiencing these emotions." Audio answered this call by stepping in where traditional sports soundtracks stepped off. **Playlists and podcasts surged during the past year with nearly one-quarter (22%) of respondents saying they tuned into more sports podcasts this year than last as a way to compensate for missing games; and 13% of sports fans say creating custom playlists to get pumped for the game has become a new 'digital ritual.'**



▶ During the regular season of their favorite sport, **60%** of sports streamers say they listen to sports podcasts *weekly*.

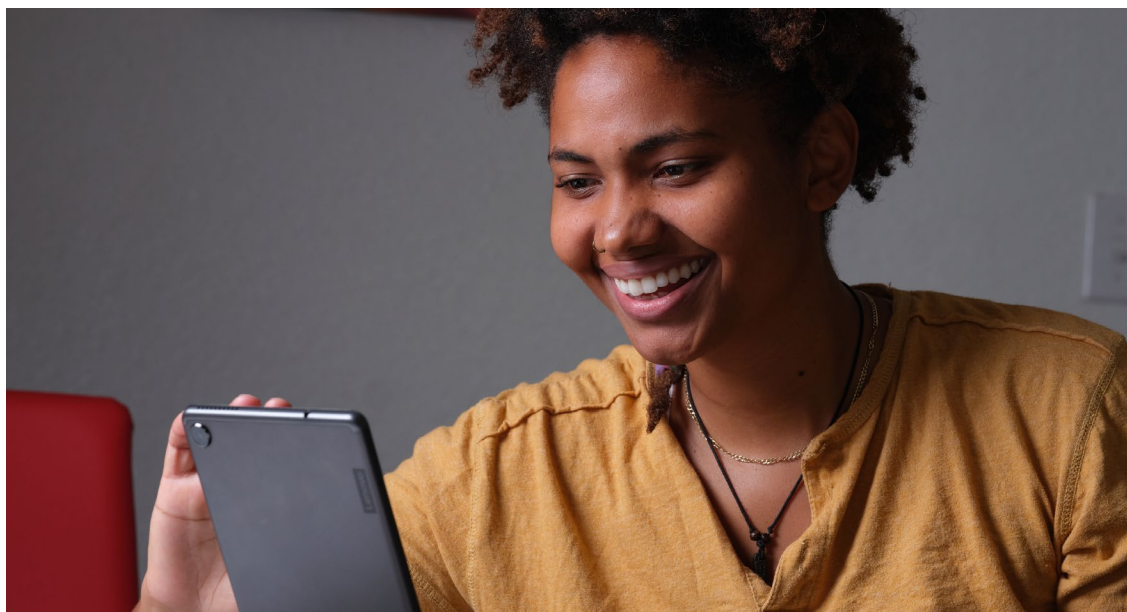
Beyond playlists and podcasts, the sports industry piped out stadium sounds digitally to bring fans the audio rituals they've come to love—from baseball walk-out songs to the requisite crowd jeering. ESPN partnered with a tech company that augments crowd noise to amplify sports experiences, to capture the at-home energy of fans, grabbing real-time game reactions straight from the source—America's living rooms—and broadcasting them back to ESPN. Similarly, Yamaha created a remote 'cheer app' that sent fan feedback directly to stadium speakers. This user-generated virtual fandom could just become a sports ritual of the future. Experts say that even after the pandemic they are looking for ways to connect fans watching from home with the in-arena experience.



## Social Smack Talk

Sports wouldn't be sports without the commentary that comes with it. The fact is that social media is where sports fans can broadcast their voice beyond the bleachers and call the shots as they see fit. "I find myself watching a lot of YouTube videos about different boxers. I love the comments the other boxing fans post on there and I also love commenting," Solanchs told us. "It's super exciting seeing what other people think and then being able to voice my own opinion." Olivia Stomski, Director of Newhouse Sports Media Center at Syracuse, credits streaming services for supercharging fans' voices through chat. "Sure, it's different from sitting in a bar or on your couch talking to your friends and high-fiving in person, 100%," she admitted. "But we are seeing that one of the reasons why streaming platforms are finding success is because they give fans a voice. Even though they are typing, they're still chatting with each other across the nation—with others who they know, don't know, agree with and don't agree with."

Expressing this voice is arguably the most powerful digital ritual among sports fans today. When we asked about the new activities fans ritually engage in, social media commentary topped their list: 27% of sports fans comment on social media about games, events, and sports-related content and 23% report they post immediately after the game. While it would be easy to assume Gen Z is driving this trend, Millennials and Gen Xers report posting on social media about sports even more than their younger counterparts. For Neal, 41, of Ventura, CA, social media and group texts are a turnkey way to keep up with the sports community he used to hang out with before family life took over. "I have auto-text created in my iPhone that with just typing 'GC' it comes out as: ⚡Go Chargers ⚡. This is my quick way to stay connected with my friends who we once watched games together." Erica, 47, of New York, NY wishes there were more platforms to create online viewing parties to "talk smack with pals."



And Danielle, 37, of Brooklyn, NY, says trash talking is a big part of her husband's sports experience—and something that she often gets pulled into. "My husband gets really into trash talking with other fans. He is in a variety of Facebook groups that are specific to the Knicks or to other teams and he will often regale me with the tales of a comment section of what is going on. He definitely jumps right in."

While sports commentary over social media talk isn't a product of the pandemic, for many it's served as an important emotional outlet and a way to connect with others during a difficult year of distancing. **According to sports fans, the second biggest impact on sports because of the pandemic—right after not being able to go to games—was, "I built a stronger online community around sports." 58% of sports fans report doing so and a very close 57% also agree, "The sports community rallied more than ever to support players and teams during this time."**

Athletes are also taking to social media to talk smack. Some even take to Twitter feeds to get motivated and fuel their game. With that said, industry experts still agree trash talking has traditionally been a good-natured way to have fun. The difference now is that fans have a bigger platform to do it.





## Digital Deep Dives

For many fans, prepping for a game has become a sport in and of itself. **Whereas pre-game prep of the past may have included tuning into a sports commentary show, or getting hyped with friends the day of, digital has made this ritual ‘ramp up’ to the game longer, deeper and more intense.** “My pre-game prep is a 6-day affair leading up to the games on Sunday,” Finn, 22, of Boulder, CO, explained. “This entails watching the waiver wire in my fantasy league on a daily basis, reading articles about team issues, and just trying to find out who could be the next breakout star before anyone else in my league does.”

Part of the reason for longer game prep, as Finn alludes to, is because the stakes are higher. Betting and fantasy leagues have upped the ante for sports knowledge as more fans have skin in the game. Nearly one-fifth (19%) of sports fans say betting has become a new sports ritual for them. Furthermore, 21% of sports fans—and 33% of Millennial men—participate in fantasy sports, and 16% of fans have spent money on a fantasy league buy-in in the past six months.

However, digging down digital rabbit holes isn’t always driven by having money on the line. **Sports knowledge is social currency, particularly among younger generations.** “Younger fans are like, ‘What do I have to know?’ in order to talk about the sport, or feel connected to pop culture,” Kati Fernandez, Director of Content Development & Integration at ESPN+ and ESPN Films, explains. And for super fans of teams and players, the need for knowledge can be a voyeuristic obsession. Athletes have become influencers in their own right, and, like the rest of influencer culture, their followers have made a sport out of following them. On Instagram, Simone Biles has more followers than the official Olympics account. Likewise, Serena Williams’s following surpasses 13 million. And as of June 2021, Argentinean soccer player Lionel Messi holds the title of the world’s most followed

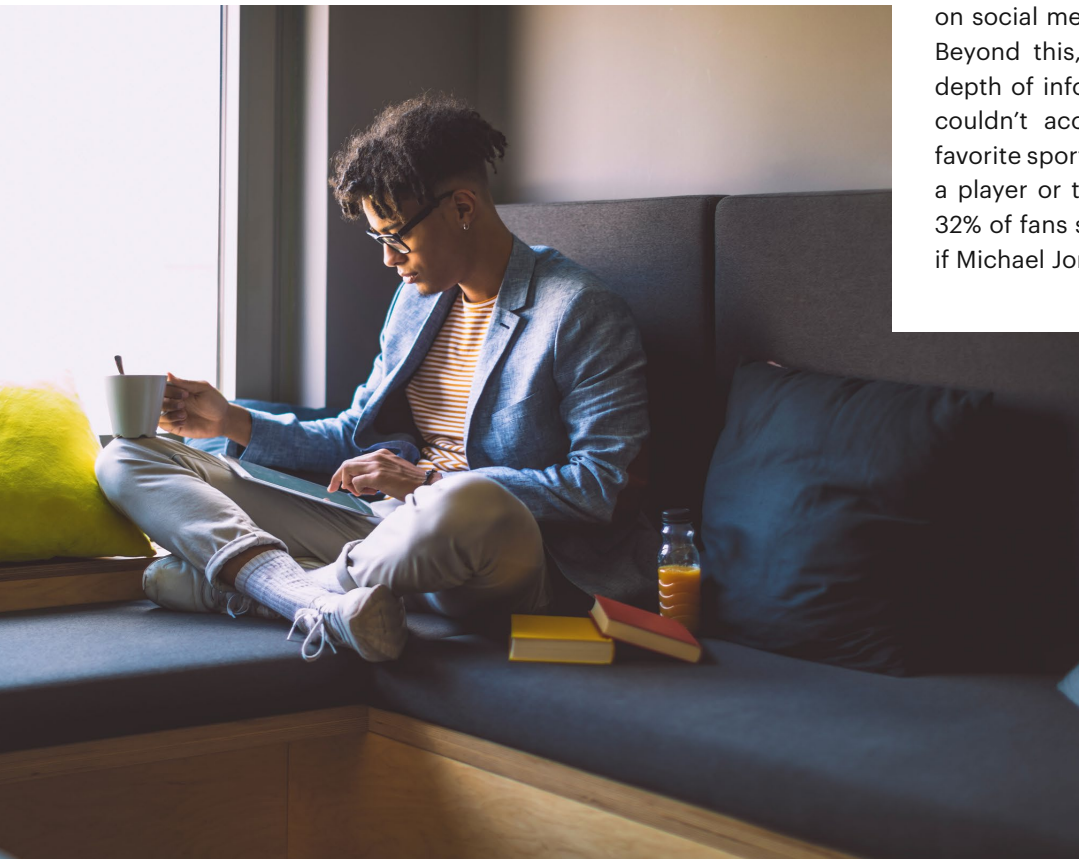


▶ **71%**

of sports streamers are checking team stats online weekly during the regular season of their favorite sport.

athlete with 217 million followers—just a few million shy of Kim Kardashian’s 228 million.

For Claude, 20, of New Orleans, LA, it’s his obsession with Serena Williams that drives his love for tennis, period. His pre-match prep ritual looks something like this: “The way I get ready for a match is by checking to see how Serena Williams is looking pre-tournament because she is the main reason I watch. After catching up on Serena’s status pre-tournament, I look at who she will potentially have to play before reaching the finals. As the tournament and Serena progress, I follow all the updates and interviews on social media and various websites.” Emma-lea, 24, of Portland, OR, isn’t quite as intense as Claude, but her love for Nebraska football drives a fair share of digital digs as well: “I follow every Nebraska Husker social media page (Instagram and Facebook) and frequently look up news about recruits and coaches.” Of course, it’s not that fans have gotten more obsessive, although the pandemic *did* give people more time online to explore their sports obsessions: One-in-five sports fans say that because of the events of the past year, they spent more time



on social media as a way to experience sports. Beyond this, however, the Internet delivers a depth of information previous generations just couldn’t access. During the season of their favorite sport, 67% of sports fans say they follow a player or team on social media weekly, with 32% of fans saying they check in *daily*. Imagine if Michael Jordan had Instagram in the 90s.

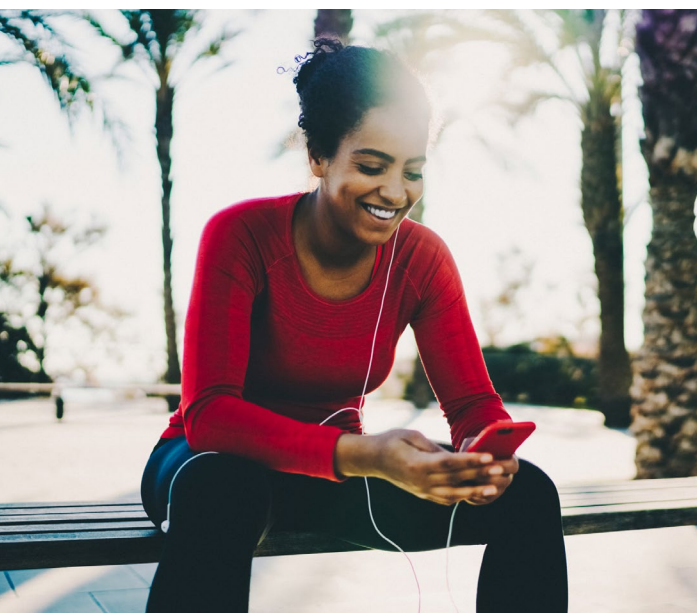
"I use ESPN+ to help curate my sports viewing experience because it allows me to get updates on what's going on in training camps, or who is a potential risk for not making the roster."

- Finn, 22, Boulder, CO



# Calling the (Virtual) Shots

One of the newer digital rituals in sports is curating viewing experiences that allow fans to not only watch sports when and where they want to, but also how they want to. Take, for instance, My Group, powered by IBM Watson, an app released late last year before The Masters Tournament. Aimed to appeal to finicky golf fans who don't like tournament coverage gaps (i.e. all golf fans), the app allows users to choose the players they'd like to follow and tees up shots from that player on every hole. Similarly, the recently released MLB Film Room empowers baseball fans to nerd out on the niche content they can't get enough of. Unlike traditional highlight reels, the Film Room is highly customizable, allowing viewers to hone in on content like 'walks with the bases loaded in the ninth inning,' 'grand slams hit off of pitches thrown at least 95 miles per hour,' or even 'Tim Anderson singles to center field off four-seam fastballs in night games' (apparently there are five of those available). These new curation apps follow the release of Buzzer, which also empowers fans to make their own custom content cuts (see *Sports Unleashed*, *The Short Game*).



**Bespoke streaming experiences like these are super-serving sports nerds as much as they're filling a white space for fans who just don't have the time to keep up with it all.**

Neal is one of those fans. In dreaming up what he'd like his future sports viewing experience to look like, he wondered, "Maybe there is a streaming service where I can watch a 5-minute highlight from the Chargers game, or get a Warriors update, because I had a meeting, or was putting the kids to bed?" For him, a big part of the appeal would be having all of the content in one place. "Instead of going to Twitter, Facebook, YouTube, and Instagram for updates, it would be rad if there was a sports area I could customize with everything." This is exactly where the sports streaming experience is headed. In addition, **77% of sports fans—and 86% of avid sports fans (those who consume sports most)—say checking out the best clips of a game or event is increasingly important to them.** Customizing these clips is the next frontier. "Highlights have evolved from just watching when you want to and the ones you want to, to a world where our personalization and algorithms are sorting through the highlights you most want to see and feeding them to you," Russell Wolff, Executive Vice President and General Manager of ESPN+ told us. With this evolution, the new sports ritual may be programming the perfect sports experience and letting tech do the rest.





## IRL is Here to Stay

The digitization of sports rituals isn't just a technological evolution, it's changing sports culture all together. Tailgating is more inclusive and sound is more immersive; sports communities have bigger platforms to jeer on, fans are armed with more knowledge, and audiences are increasingly in charge. **However, before writing off the live sports experience as a thing of the past, consider this: sitting down to watch the game when it happens—arguably the most OG sports ritual of all—is trending right alongside this new wave of digitally driven sports rituals.** Nearly half of sports fans (43%) say there's still a certain exclusivity—and nostalgia—in watching the old-fashioned way. In fact, despite virtually all sports fans saying they tap into tech to watch sports, 67% of sports fans agree they miss the days when everyone watched the same game or cheered for the hometown team. Caitlin, 37, of Kinston, NY, for example, manages the Instagram for her Brooklyn-based softball league, but acknowledges her love for the game is anchored in live experiences with her dad. "I grew up watching baseball with my dad (go Yankees!) and it's extremely nostalgic for me."



Even the digitally native generation values traditional sports viewing experiences. For Fantasy Sports enthusiast Finn, this means watching games over wings with friends. "I go to Buffalo Wild Wings because it maximizes my ability to watch as much in real time as possible," he explained. "Fantasy sports are always more enjoyable when you can see your fantasy points accumulating in live action." He's not the only Gen Z to say Buffalo Wild Wings is his source for sports. Mitchell, 18, of Guilford, CT, also goes to the wings-and-beer-sports chain regularly after games. After wrapping up a recent baseball game, he and six of his teammates headed there to catch the New York Yankees vs. Tampa Bay Rays game live. "We watched the game because it was on one of the televisions in the restaurant and all of us are baseball fans. We wanted to get wings and watch games following our win." If that doesn't sound about as evergreen as sports rituals get, we're not sure what does.

**The takeaway is this: new digital rituals are evolving sports culture but not cannibalizing traditional experiences; they're supplementing old rituals and making the sports experience more diverse, and more fulfilling.**

▶ "I'm absolutely looking forward to getting back together with friends and being able to stream sports together."

- Danielle, 37, Brooklyn, NY



# DIGITAL RITUALS BRAND TAKEAWAYS



The pandemic created the need for sports fans to find new ways to connect with their sports communities, from attending virtual tailgates to sharing Game Day playlists.

These new formats are likely to stay even after the pandemic, and offer new and creative opportunities for brands to be part of sports experiences.



Podcasting continues to grow in popularity among sports fans.

Consider partnering with sports podcast hosts to reach your consumers on a more personal level.



Keep in mind that digital sports rituals are trending alongside traditional sports viewing.

It's important to balance digital brand opportunities with IRL experiences to capture the full range of sports fans and the full spectrum of sports experiences.





# OUTER RINGS

Outside of the main sports arena is a growing number of fans who are getting in on the game in new, different, and lucrative ways. Sports betting and fantasy sports are surging in popularity and accessibility, and eSports is redefining what sports are altogether. A cultural spotlight now shines on what was once the outer rings of sports—betting, fantasy leagues, and video games —creating an entirely new inner circle of future sports fandom.



## Gamifying the Game: The Burgeoning Sports Betting Landscape

May 14, 2018 was a pivotal moment for the U.S.'s estimated \$150 billion underground sports betting industry. The Supreme Court struck down the 1992 Professional and Amateur Sports Protection Act (PASPA), a federal law that had prohibited sports betting in most states for nearly three decades. In just three years since this ruling, half of all states and Washington D.C. have legalized sports betting. "The Supreme Court decision opened the sports betting floodgates," Kyle, 31, of San Diego, CA told us. **"Sports betting was on the fringes as recently as a decade ago, but it's no longer confined to Vegas or a shady booker. Anyone can download an app on their phone, place a bet, and cash out."** Backing up the mainstreaming of sports betting, Olivia Stomski, Director of Newhouse Sports Media Center at Syracuse, says betting is quickly weaving its way through almost every facet of sports. "There was a time when you wouldn't touch betting or odds," she explained. "Now we're asking, 'What else can we add to the betting experience?'"

► **54%**

of sports streamers  
are interested  
in sports betting.



The industry is answering with a range of new ways to wager on spreads, moneylines, passing yards, strikeouts, and more. One such way is the just-opened sportsbook inside of Capital One Arena, the first professional sports arena to offer legal betting within its walls. Evangelized by sports industry experts as a data-driven fan experience, the two-story, 20,000 square foot facility looks like the love-child of an upscale sports bar and Las Vegas, complete with comfy seating, betting kiosks, 24 beer taps, a restaurant headed by a Michelin-starred chef, floor to ceiling screens, and boards of data on odds and point spreads. Other in-arena betting experiences are likely to follow. The Nationals are planning to open a similar concept in Nationals Park, the Arizona Diamondbacks have been approved by the state to open a sportsbook across from their ballpark in downtown Phoenix, and Philadelphia just opened its long-awaited \$700 million Live! Casino and Hotel Philadelphia gaming hall in the city's Stadium District, which houses a FanDuel sportsbook and lounge. Experts are



“As more states continue to legalize betting and the historical stigma is lifted, sports gambling will become ubiquitous.”

- Kyle, 31, San Diego, CA

banking on these digital betting “portals,” as they’re called, to play a crucial role in luring young sports fans back to arenas. It could be a good bet: Among the 36% of sports streamers who say betting is one of the primary reasons they follow sports, Gen Zs lead the pack with 48% saying that betting is a driver for their fandom.

Arena-adjacent sportsbooks are just one iteration of clicks-and-mortar sports betting experiences that fans will increasingly have access to. DraftKings and sports bar chain Sports & Social announced this summer that they are teaming up to launch upscale, betting-themed sports bars across the country, starting in Nashville and Detroit. This comes one year after Buffalo Wild Wings and Roar Digital, MGM Resorts International’s sports-betting venture, created a multi-year partnership aimed at revolutionizing the sports bar experience through its wings, beer and betting concept. While inside Buffalo Wild Wings locations in New Jersey, Indiana, Colorado, West Virginia, Tennessee, and Iowa, sports fans can place bets on the BetMGM app, which offers up better odds on select bets, as well as other perks. Buffalo Wild Wings is also set to roll out an

in-bar channel, “OT Odds Powered by BetMGM,” aimed at its betting clientele and featuring sports betting content like live game odds and fantasy league betting advice. The strategy of embedding betting into restaurant experiences could be a lifeline for sports bars which, like other restaurants across the country, suffered during the pandemic and now need something other than carrying the big game to get people off of their couch, particularly during non-peak sports periods. Kyle sees the potential. “Sports betting has the opportunity of making people invested in games and moments beyond their home team and gets fans invested in games that would otherwise be meaningless,” he told us. “It gives me a reason to watch the Bengals play on a Sunday afternoon, midweek MAAction, and championship soccer—all things I would never otherwise invest my time in.”

**Beyond the integration of sports betting into physical spaces, streaming services are in the early stages of experimenting with betting formats to enhance the sports**

**experience.** FuboTV has introduced a dashboard that streamers can pull up to place bets while watching games. This new feature allows for fans to bet on things like “which team will score first in the second half,” and will evolve to include more immersive and custom betting experiences, tailored to viewers content and betting preferences based on their viewing data and previous bets. Other streaming services are also taking advantage of the opportunity. Sinclair plans to offer a standalone streaming service with a betting component and NBCUniversal added a betting companion show to the PGA tour this year on Peacock, its solution to streaming.

**Audiences also feel streaming services can uniquely serve the sports betting marketplace in ways traditional networks, or large-scale betting venues, can’t.** Kyle, for one, sees growth in the ‘outer rings’ of sports betting: “Streaming services, especially, have the ability to cater to more niche audiences,” he observed. He makes a good point. Outside of big arena sports, there is an opportunity for



sports betting in games around the world—like table tennis, for example. One 23-year-old from New Jersey told the *New York Times*, “It’s crazy to think I’ve made hundreds of dollars [betting on] Ping-Pong [overseas].” Like other obscure pastimes that surfaced during the pandemic as people had more downtime at home, betting on international contests—including sports like Belarusian ice hockey, Nicaraguan soccer and South Korean baseball—caught the attention of fans at a moment when many traditional domestic sports were sidelined. While some of these niche sports haven’t had as much staying power as table tennis, the pandemic highlighted the potential of the longtail of sports betting. Considering that nearly one-in-five sports fans (17%) report having tuned into a niche or global sport outside of the norm in the past six months, there is an opportunity for streaming services to not only give fans access to these unique sports, but also wager on them.

While the future of sports betting is just beginning to unfold, what is certain is that the market is there—and it always has been: betting on horses and baseball predate the twentieth century; Las Vegas opened its gates to sports betting in 1949; and people have been betting on the Super Bowl since its incarnation. This year alone, 23.2 million Americans planned to bet \$4.3 billion on the big game, according to *AdWeek*. Many believe that legalizing and regulating sports betting will ultimately create a cleaner and fairer playing field. Kyle, for one, is excited. “It’s the direction that the public is moving,” he told us. “Sports betting is becoming massive.”





## Sports Fantasy: The Reality of Fictional Sports

Finn, 22, a rising senior at University of Colorado, Boulder, was about to give up on the Cincinnati Bengals until fate—or, more precisely, fantasy—stepped in. Having been dedicated to the Bengals since age 10, the team’s losing streak was starting to take a toll. “I had been utterly disappointed every year and I was starting to lose interest in the NFL because I felt like I had no reason to keep watching,” he reflected. However, at 17, he was asked to join a 12-person fantasy football league. For some, the league was a way to feel more connected to the NFL season; others joined because of the betting. Finn joined to make his life as a Bengals fan “a little more bearable,” as he put it, by giving him a chance to ‘win’ even if the Bengals didn’t. Now, Finn’s fantasy league has expanded into an all-year, all-encompassing sports group on Instagram, Twitter, Snapchat and four other means of messaging with an average of 1,000 group messages *each day*—and easily “a couple thousand” during football season. “If I have a question about anything pertaining to [sports], I’ll ask the question in the group message before Googling it.”



While Finn's fantasy league may be an extreme example, he's not alone in his enthusiasm for fantasy sports: **one-in-five sports streamers (21%)—and one-in-four male sports streamers (26%)—say they have participated in fantasy sports in the past three months.** While the popularization of fantasy sports began in the 1980s, its growth has accelerated in the past decade with emergence of Daily Fantasy Sports (DFS), an accelerated version of traditional fantasy sports that can be played over one week, or even one day, rather than an entire season. Taken together, **fantasy sports and DFS has grown from 5.1 billion in the U.S. in 2011 to 8.37 billion in 2021, and it is expected to hit 13.75 billion by 2025** according to Statista. What's more, an entire economy has developed around fantasy sports, including a cottage media industry with niche websites on statistics, podcasts, analysts—and even weathermen. Kevin Roth is a meteorologist for RotoGrinders, a website dedicated to daily fantasy sports. He has a master's degree in meteorology, but uses his expertise to analyze how, for example, 20MPH winds could create a 10% drop in passing yards and impact fantasy league results. While he may be one of the better-known fantasy sports weather analysts, others are out there, like the Fantasy Football Weather Guys, "professional meteorologists providing statistical analysis of weather impacts on fantasy football," according to their website. Retailers also make up a piece of the fantasy economy. ESPN's Senior Fantasy Sports Analyst, Matthew Berry, runs Fantasy Life, an online retailer that sells hoodies, tumblers, phone cases, and a signature toilet-shaped loser's trophy. The point is, while fantasy sports is fictional, the business surrounding it is very real.

**In many ways, fantasy sports were a precursor to, or placeholder for, sports betting.** The head of content at a sports betting news website shared in an interview with Vox Media, "I think there still would've been a pretty decent groundswell of sports betting without [fantasy sports], but everyone got more comfortable with it because of daily fantasy." The popularity of fantasy sports is anchored in a bigger shift in sports culture: following players versus teams. Gen Zs, the youngest generation of sports fans, report that they are less likely to follow

sports because of a specific team than are their parent's generation (25% vs. 34%, respectively) and, when asked the top reason they do follow sports, they are more likely to say their fandom is based on a specific player, or players (40% vs. 36% among older generations). Millennials are more likely to follow their local teams (40%) compared to Gen Z sports fans (32%). Generationally speaking, the preference for players makes sense: Gen Zs came of age during the era of influencer culture, where individuals rather than groups commanded culture's attention; following individual players isn't so different from following individual influencers online.

For Finn, being freed from the team mentality in sports has been game changing. "What fantasy football allowed me to do was get two to three good players on the Bengals' team on my fantasy roster. Even if the Bengals lost, I could root for individual players and get a 'tangible' reward for it." Furthermore, the camaraderie that was once tied to rooting for a local team is now fueled by the 1,000 group texts his fantasy league trades daily, as well as a new set of bonding rituals that have emerged around fantasy leagues, like the Waffle House punishment. Popularized on social media in the past few years, the ritual entails the league loser having to sit in Waffle House for 24 hours and can earn less 'time' by consuming waffles (one waffle = one less hour of service). Finn also finds that fantasy leagues, while not rooted in hometown teams, help bond him to his hometown community: "My friends and I used to watch games every week together in high school, but now that we are all scattered across the country [in college], fantasy football is how we all stay connected."



Fantasy leagues are also building camaraderie by reorganizing into new, community-driven formats. In the spring of this year, the Hall of Fame Resort & Entertainment Company launched the Hall of Fantasy Leagues ("HOFL"), a 10-franchise league described as "the first national fantasy league that allows you to experience a fantasy team with a community of shared stakeholders." The franchises within this new league include the Atlanta Hot Wings, the New York Bodega Cats, the Ohio GOATS and the Texas Y'allers, among others. Each franchise is connected to major U.S. cities, professionally managed, plays competitions over the course of a full season, and even has a show that airs every Tuesday at 8pm EST, hosted by sports broadcaster Jeff Eisenband. Sound familiar? Ironically, fantasy sports may be coming full circle, back to its traditional roots, making the fine line between fantasy sports and 'real' sports even more blurry.

# The Game of Gaming: Unpacking the Appeal of eSports

For anyone who dismisses eSports, or competitive video gaming, as ‘not real sports,’ consider this: **one quarter of sports fans (26%) watch eSports and it surpasses other sports mainstays, such as NASCAR, beach volleyball, pro wrestling and international soccer, as a favorite among sports fans.** Furthermore, according to Statista, the global eSports market revenue is projected to grow as much as 1.62 billion U.S. dollars in 2024. And while it’s true that eSports is relatively new to the sports industry, it actually got its start back in the 1970s. On October 19, 1972, Stanford University held the first-ever eSports event, where students competed at the video game Spacewar! for the cool prize of a one-year subscription to *Rolling Stone* magazine (if that’s not a rock-and-roll start, we’re not sure what is!). Today, prize money for eSports competitions have hit nearly \$35 million. “I think there’s this conception of eSports as this diminutive thing, but everybody plays or watches games. Whether it’s solitaire on your way to work, or a million-dollar tournament at Madison Square Garden,” Zach Dixon, Co-Founder of Players’ Lounge, an online eSports competition platform, told us. “So, re-

ferring to eSports as a sport makes sense.” **81% of eSports fans agree that “eSports are real sports, just like football, basketball or baseball.”**

According to Dixon, eSports developed a lot like traditional sports—only faster. “When games are fun to play with friends, then they tend to be fun to play with strangers,” he explained. “And then people get really competitive and self-organize into leagues. English soccer teams professionalized across the 19th century and 20th century to what the [English] premier league is today; that happened with League of Legends in 15 years.” South Korea fueled the popularity of eSports, where the game of gaming has become a national institution. Underscoring this, eSports is the fifth most popular future job for South Korean students, according to the *New York Times* (athlete, doctor, teacher and digital content creator take the top four spots), and eSports pros are on par with K-pop idols, in terms of fame and fortune. “I sleep only three or four hours a day,” one teenage Korean eSport academic told the *Times*. “But I want to become a star. I dream of an eSports arena packed with fans all rooting for me.”



South Korea's influence on eSports aside, there are a few unique features to eSports that make it exponentially appealing to fans. One that Dixon points out is that there is a greater range of eSports viewing experiences. "Nobody cares about watching a few attractive or clever people playing non-professional basketball. Nobody's going to tune into that broadcast consistently. But there are millions of people every day that watch non-professional gamers play non-professional video games on Twitch and similar streaming services," he explained. Another key driver of eSports' global popularity is its accessibility: while not everyone has the physique to become an NBA or NFL star, anyone with access to a console or a computer could, theoretically, go pro at eSports. "What I like specifically about eSports is that you don't have to be a traditional athlete to play," Jamael, 19, of Atlanta, GA, told us. This fact makes eSports unique in that, unlike traditional sports fans, most eSports fans are also eSports players, so their attachment to the game is personal. **Backing this up, 83% of eSports fans agree, "Playing video games is more than just a pastime for me—being a gamer is an integral part of my identity,"** and 76% of players aspire to go pro. "There are a lot of people who never play baseball who are baseball fans, or women who like football who have never played. They just like it as entertainment," Dixon explained. "You don't really get that as much with eSports. There's a big cultural difference."





Despite these differences, there are a lot of similarities between eSports and the non-E variety. For one, camaraderie is still king: 86% of eSports fans agree, “eSports isn’t just about the game, but about the banter and dynamic between gamers and teams.” And while these communities are largely digital, just like traditional sports, live games matter too, with 77% saying they attend, or plan to attend, an eSports event. Younger fans, like Gen Zs, may not even see the difference between the two at all. Dixon reflected, “The idea of being a professional gamer was never a reality when I was 18. But my nephews are 16, 13 and 12. They have a ton of access to eSports pros because they watch them on Twitch every day after school, and they watch them play in big tournaments. They look at eSports the way previous generations looked at football. It’s no different.”

In conclusion, the world of sports is dynamic, with generations, cultural shifts and technology continuously broadening how sports and sports fandom are defined. **Sports betting, fantasy sports and eSports once represented the outer rings of the industry, but today they are fast becoming new centers of the expanding sports universe, ushering in new, diverse fans that ultimately elevate the game.**

▶ **82%**

of eSports fans predict that, in 20 years, eSports will be as popular as football in the U.S.

# OUTER RINGS BRAND TAKEAWAYS



Sports communities are changing as sports betting and fantasy leagues continue to grow in popularity.

These games outside of the game are becoming central to why fans watch, bringing an additional layer to the fan experience.



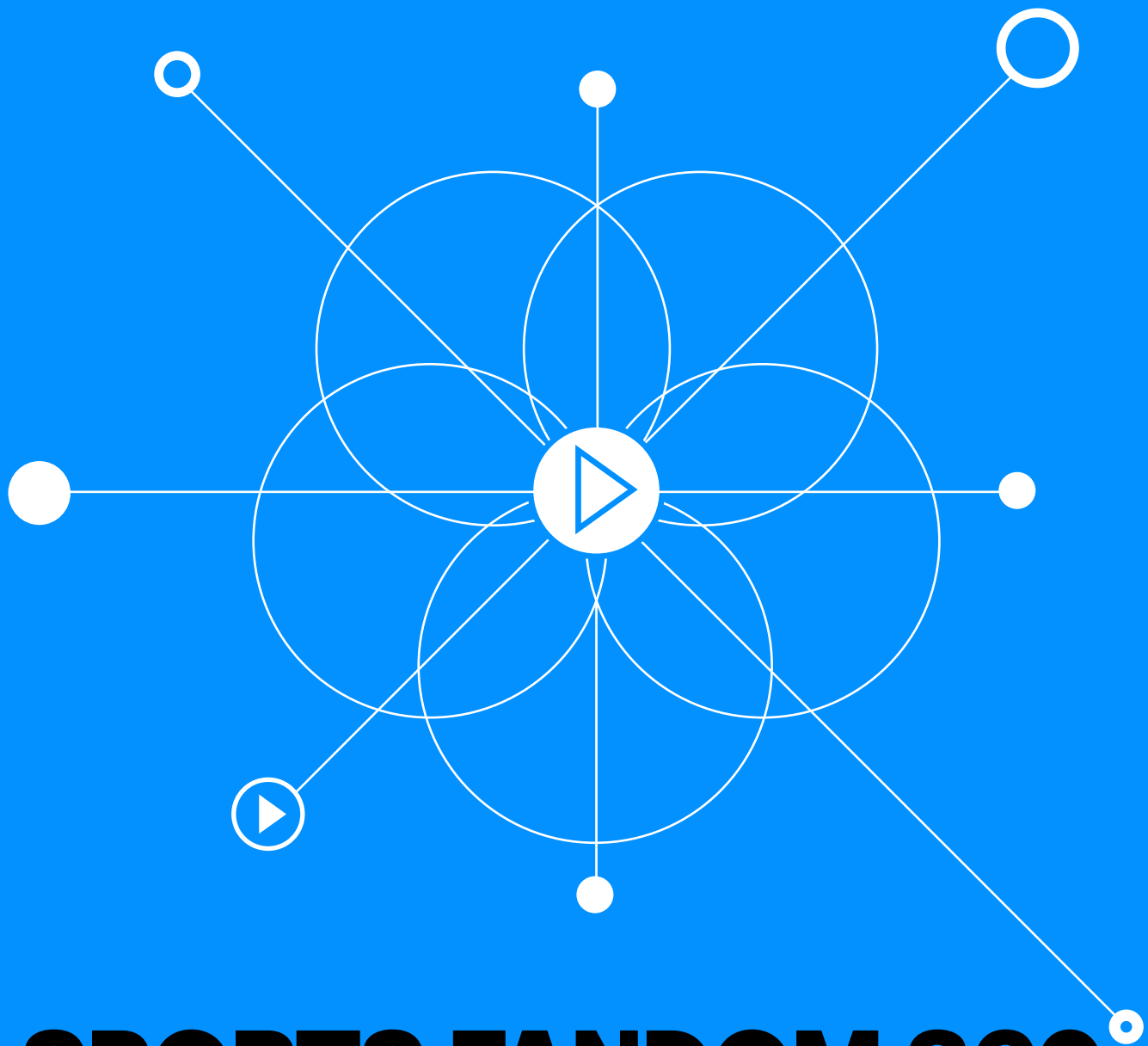
Sports betting will continue to impact the sports industry, opening up opportunities for new sports betting venues, restaurants and tourism.

Consider how your brand can become part of this burgeoning sports betting landscape.



eSports continue to gain traction among young sports fans who don't see the difference between video games and traditional sports.

Think about opportunities for your brand in the eSports and gaming space, particularly as a way to reach Gen Z audiences.



# SPORTS FANDOM 360

Five emerging segments are shaping  
the future of sports streaming

# Introducing Sports Fandom 360

As streaming unleashes more diverse sports experiences, audiences are grouping into new clusters of fandom. Each of these clusters, or fan segments, tells a deeper story about the evolution of sports in an era of social media, social activism, and more. But what's common among all of these groups is that streaming has changed their sports experience: **69% of sports fans say that, because of streaming, they watch sports differently now than they did in the past, with the top difference being easier access to more sports content.** And that other 31%? Well, many of them have never experienced sports without streaming. "My generation was born into a time where streaming our favorite media gets easier by the day," as Maya, 15, of Chico, CA put it.

These fan clusters are anchored in a full circle of ever-expanding attitudes, preferences, and behaviors toward sports. From the games they gravitate to—NBA, MMA, or anime—to why they tune in in the first place: betting, bonding, bingeing, rooting, relaxing, tweeting, and tailgating. It's a dynamic spectrum of experiences that will continue to fragment and reform as streaming continues to change sports formats and evolve fandom. But what we know for sure is that the days of the singular sports experience, or the singular sports fan, is a thing of the past.

Meet the audiences shaping the new full circle of future sports fandom: **Amplifiers**, classic Big Four fans giving sports a digital and pop culture twist; **Universalists**, voracious fans who experience sports on multiple levels; **Nichesters**, young, digital-first fans who enjoy the longtail of niche and global sports; **Soloists**, folks who prefer to fan without distractions; and **Classics**, traditional sports fans who tune into live games and prioritize IRL experiences.

## Top 5 Ways Streaming has Changed the Sports Experience for Fans

Sports fans say:

**49%** Accessing sports is easier than ever

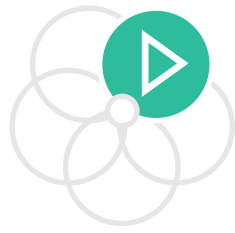
**45%** It has become easier to find fans like me

**41%** I watch more of my favorite sports

**35%** I watch a larger variety of sports



# Meet the audiences shaping the future of sports fandom.



## Amplifiers

# 17%

of sports streamers

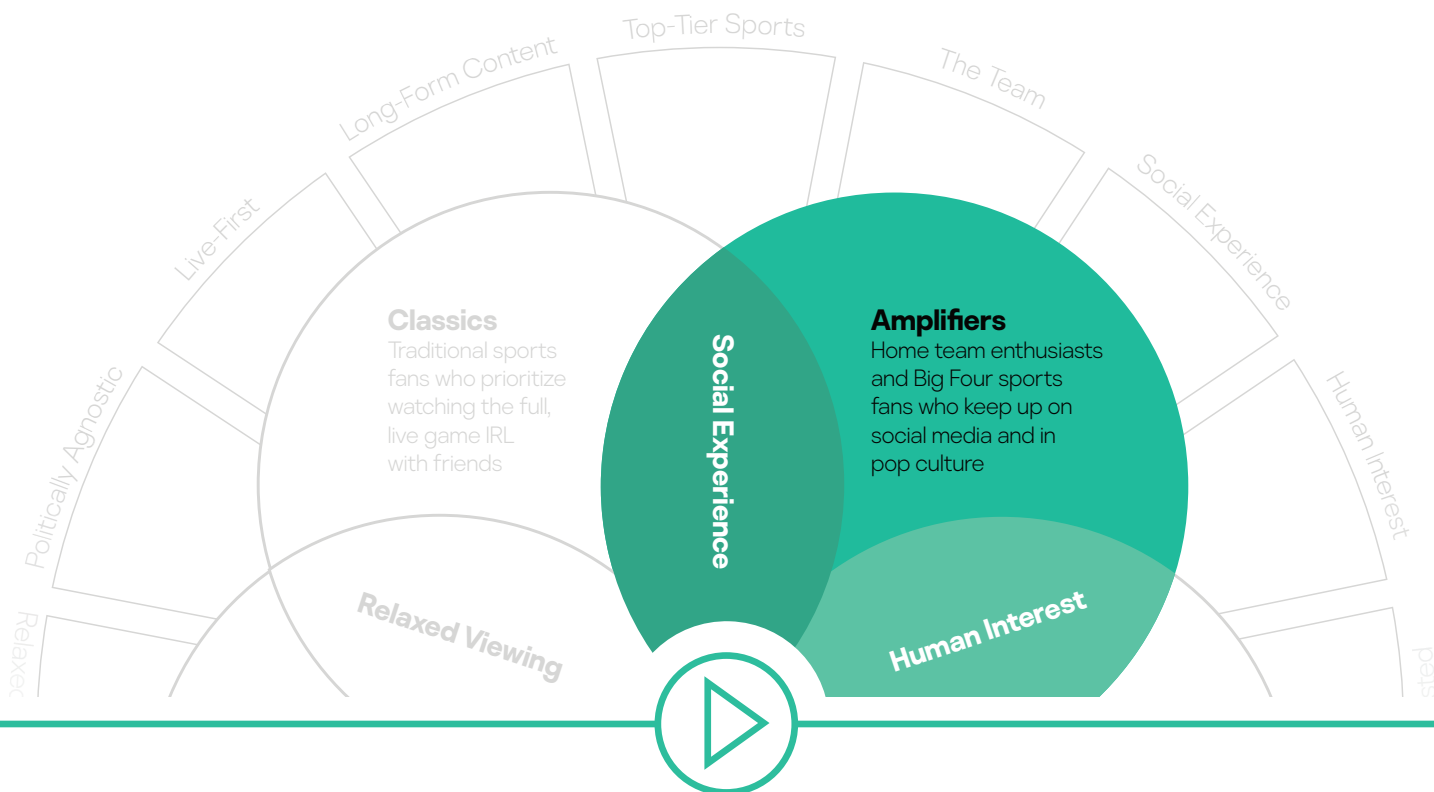


It could be easy to brush off the Amplifiers as another generation of cheerleaders. They follow the Big Four, root for the home team, are emotionally invested in the game and ultimately see sports as a social experience—what’s the point of watching without family, friends and food? **But think of the Amplifiers as quintessential super-fans with a digital twist: they are dialed into pop culture and their fandom is amplified on social media.** For them, cheering for the home team happens as much in the living room and on the bleachers as it does over Instagram, Facebook and TikTok. They are known for social smack talk, digging down digital rabbit holes for sports commentary and stats, and are the most likely to message friends in a group chat while watching the game (31% sports streamers vs. 25% overall). Despite their digital savviness, sports are ultimately a human experience for Amplifiers. Not only do they watch socially, but they also enjoy documentaries and storytelling that hones in on the human side of sports.



“I follow a lot of celebrities and boxers on social media. If fights are coming up, I’ll post it on my Instagram story just to let other people know, ‘Hey this fight is coming up let’s all get really excited about it!’”

- Solanchs, 28, Miami, FL



## Amplifiers

### Streaming Profile:

#### Amplifiers' streaming behavior

**27%** Stream Only  
vs. 23% among total sports streamers

**42%** Stream Most  
vs. 46% among total sports streamers

**31%** Stream Also  
vs. 31% among total sports streamers

### Audience Snapshot:

#### Amplifiers at a glance

**Watching:** College sports

**Eating:** Sushi bowl, made from a recipe on TikTok

**Wearing:** Something Instagram-worthy

**Doing:** Messaging friends in a group chat

**Following:** Their favorite team on Instagram

**Where you'll find them:** ESPN

### Personal Scorecard:

#### Amplifiers' standout streaming stats

**Follow top-tier sports:** Only 57% watch sports outside of the Top 10 vs. 74% of sports streamers

**Most avid fans:** 64% are "avid fans" (an 8, 9, or 10 on a 10-point scale) as compared to 51% of sports streamers

**Home team pride:** 56% are exclusive fans of a team that is geographically close to them now vs. 23% of sports streamers

**Community-connected:** 73% say sports connects them to family, friends, neighbors, colleagues & community vs. 63% of sports streamers

**Storytelling-centric:** 74% enjoy human stories of teams or athletes compared to 68% of sports streamers

#### Most similar to:

**Classics:** They tune into top-tier sports and enjoy watching with friends

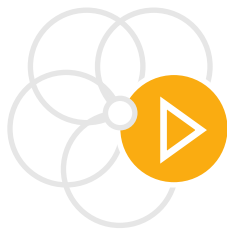
**Universalists:** They're socially engaged on media and care about the human side of sports

## Universalists

# 33%

of sports streamers

Universalists, as the name implies, enjoy the widest range of sports and express the most diverse types of fandom, multitasking across platforms as they watch games to keep up with social posts, player stats, fantasy leagues and podcast commentary. Far from sports snobs, this group tunes into the NFL as much as eSports and, on average, follow nearly twice as many sports as sports streamers overall. But their open-mindedness isn't limited to sports: **Universalists are the most likely of any segment to describe themselves as culturally curious, global, and trendsetting.** Like the Amplifiers they are not only highly social and enjoy the human side of the game, but they are also highly socially conscious—they are more likely than any other segment to describe themselves as such, and the most likely to say that the intersection of sports with race and social activism is important to them (64% of Universalists vs. 56% sports streamers overall).



“My generation doesn’t want to be tied down to just one sport, one topic, one issue.”

- Jamael, 19, Atlanta, GA

# Universalists

## Streaming Profile:

### Universalists' streaming behavior

**22%** Stream Only  
vs. 23% among total sports streamers

**51%** Stream Most  
vs. 46% among total sports streamers

**27%** Stream Also  
vs. 31% among total sports streamers

## Audience Snapshot:

### Universalists at a glance

**Watching:** Everything—from the Big Four to cricket, poker, rugby, disc golf, water polo, truck, tractor pulling and more

**Eating:** Sustainably farmed burgers

**Wearing:** #BlackLivesMatter NBA pin

**Doing:** Betting on a Fantasy League

**Following:** Blogs, podcasts, Twitter

**Where you'll find them:** ESPN+

## Personal Scorecard:

### Universalists' standout streaming stats

**Watch the most sports:** 8.9 sports vs. 5.5 sports among sports fans overall

**Plugged-in:** 24% share screens or video chat with friends while watching sports vs. 17% of sports fans

**On the "Outer Rings" of fandom:** 36% stream eSports vs. 26% sports streamers overall; 27% participate in fantasy sports vs. 21% of sports streamers overall

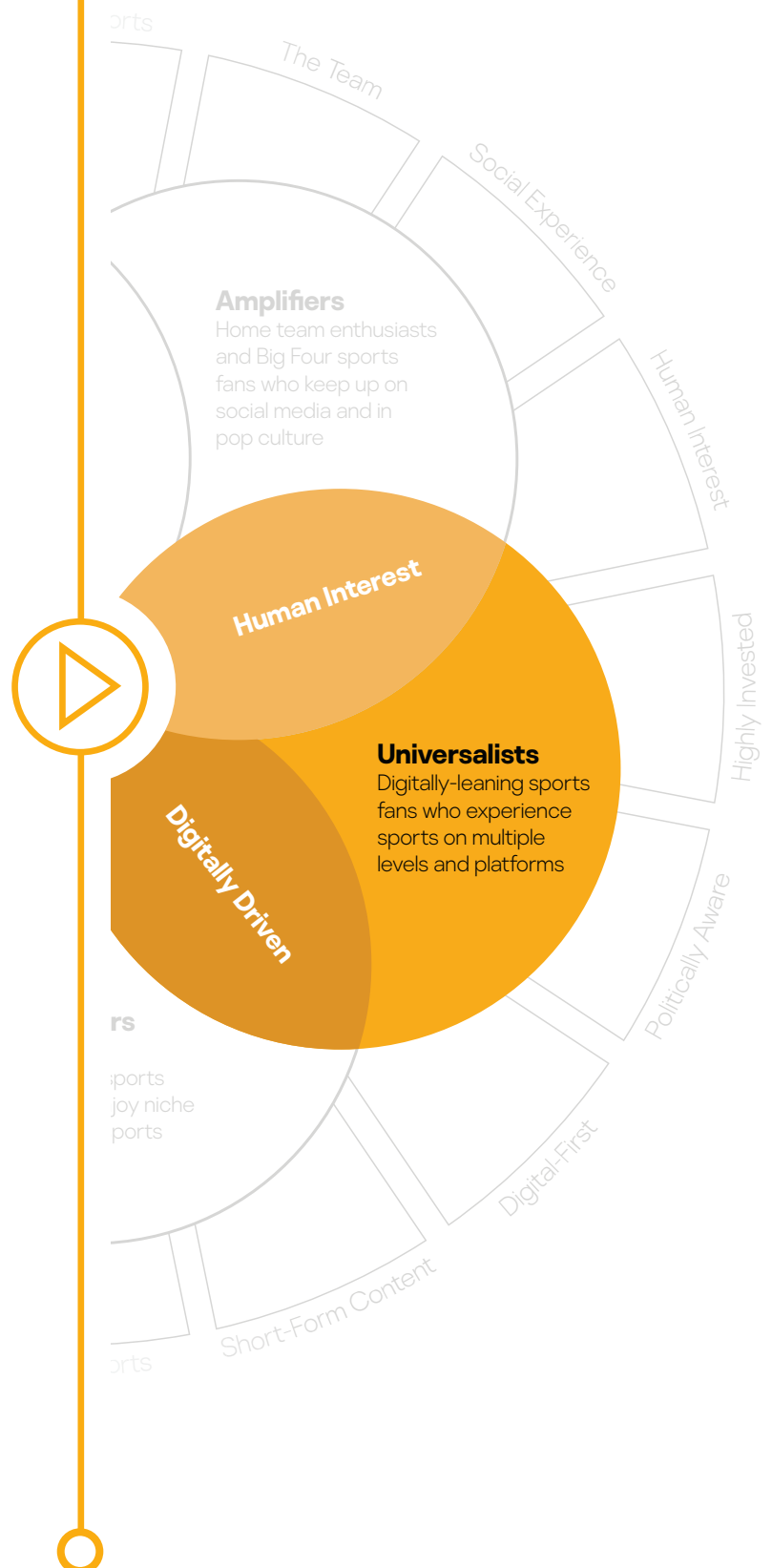
**Socially Active:** They are the most likely to follow a player or team because of their social activism (23% vs. 18% of sports streamers overall)

**Intellectual:** 25% listen to podcasts before or after games to get new or different points of view on athletes, teams, the game, or other sports content vs. 20% of sports fans overall

## Most similar to:

**Amplifiers:** They're socially engaged on media and care about the human side of sports

**Nichesters:** They're into the 'long tail' of sports and are more diverse, global and digital than most sports streamers



## Nichesters

11%

of sports streamers



The youngest of the sports segments (51% are Gen Zs vs. 40% of sports streamers on average), Nichesters reflect a generation known for having shorter attention spans and bespoke identities, and their interest in sports is no different. They are the most likely of sports fans to watch highlights only (29% of Nichesters vs. 23% of sports streamers overall) and they are less likely than most to watch the Big Four (75% watch the NBA, NFL, MLB and NHL vs. 84% of others). **Interestingly, they are tuning into the longtail of sports content:** 20% of Nichesters watch anime sports vs. 15% of sports streamers overall; 16% watch badminton vs. 10% sports streamers overall; 13% watch cricket vs. 8% sports streamers overall; and 9% watch handball vs. 5% sports streamers overall. While they don't rank as the most avid sports fans, **their penchant for sports outside of the norm means that they watch more types of sports than do other fans**—6.1 vs. 5.5 on average, second only to Universalists. Personal experience (i.e. they've played the sport themselves) and pop culture are big drivers of Nichesters' fandom and, when it comes to social media, Nichesters aren't just following sports, they are creating content and posting about their favorite players.

▷ “Growing up I was only aware of traditional sports or popular western sports, like NBA, NFL, MLB, and WNBA. But streaming is a great opportunity to discover alternative sports.”

- Rose, 37, San Antonio, TX

# Nichesters

## Streaming Profile:

### Nichesters' streaming behavior

**21%** *Stream Only*  
vs. 23% among total sports streamers

**55%** *Stream Most*  
vs. 46% among total sports streamers

**25%** *Stream Also*  
vs. 31% among total sports streamers

## Audience Snapshot:

### Nichesters at a glance

**Watching:** Anime sports

**Eating:** Street food

**Wearing:** Customized kicks

**Doing:** Virtual tailgating

**Following:** YouTube sports videos *not* related to games

**Where you'll find them:** Hulu + Live TV

## Personal Scorecard:

### Nichesters' standout streaming stats

**Niche appeal:** 20% watched a niche or global sport that is out of the ordinary in the past six months vs. 17% overall

**Content creators:** 61% create or comment on sports-related content weekly vs. 55% of sports streamers overall

**Multimedia experiences:** 68% play sports-related video games weekly vs. 59% of sports streamers, and 16% created a playlist for a game vs. 12% of others

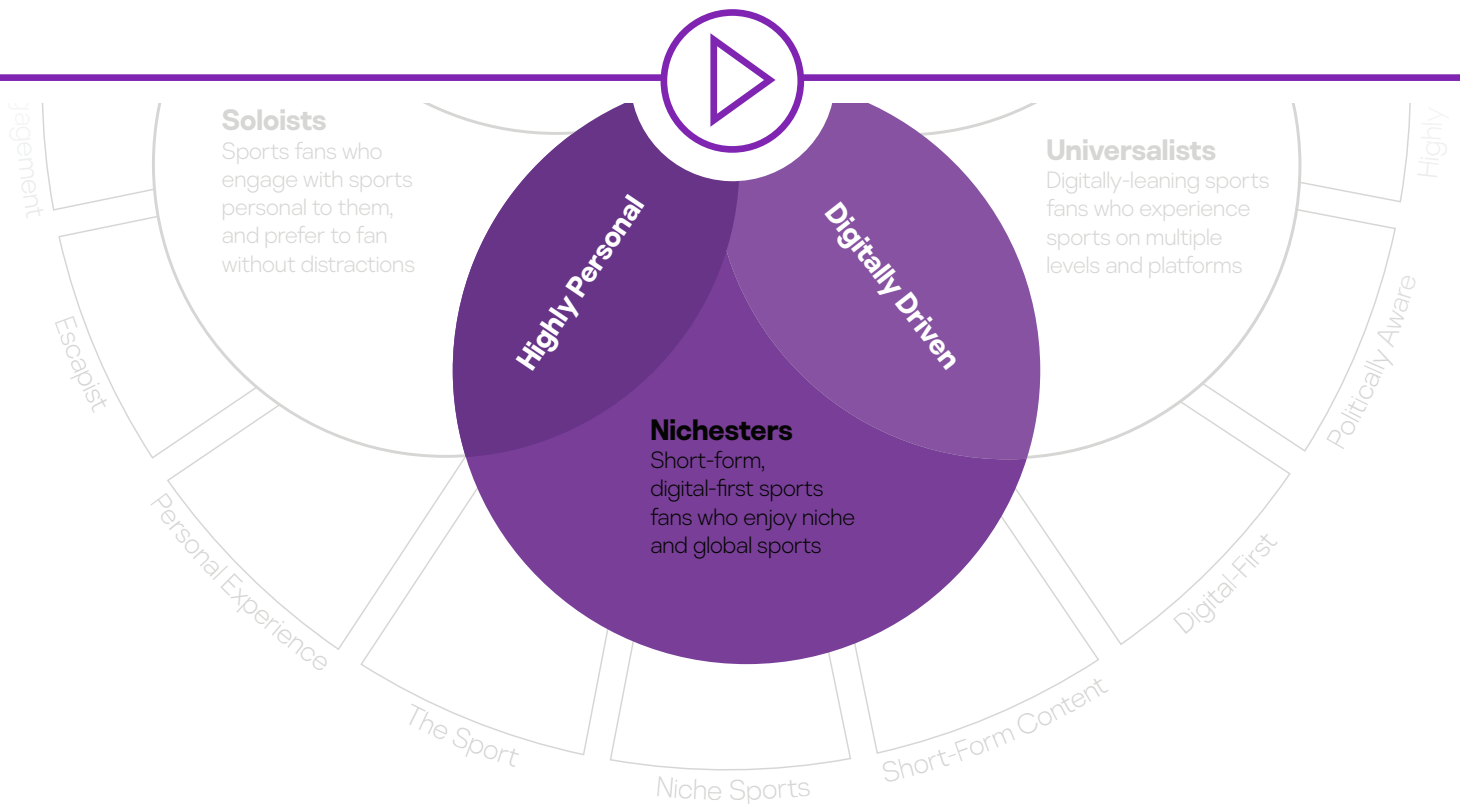
**Location agnostic:** Only 16% are exclusive fans to a team geographically close to them vs. 23% of sports streamers overall

**Looking for inclusivity:** 52% say it's hard to find an inclusive sports community vs. 45% of sports streamers overall

### Most similar to:

**Universalists:** They're into the 'long tail' of sports and are more diverse, global and digital than most sports streamers

**Soloists:** Sports is a personal experience rather than a team one



## Soloists

# 18%

of sports streamers

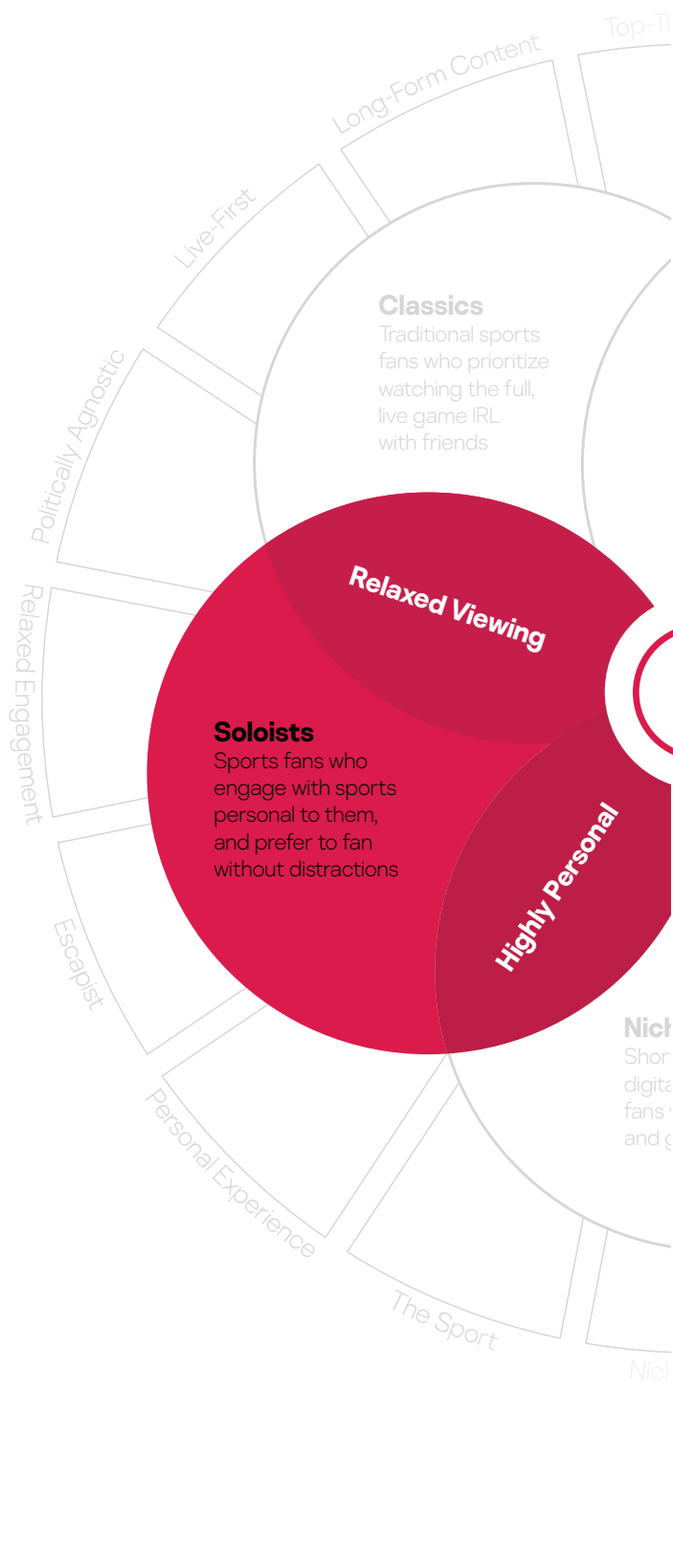


For Soloists, the social aspect of sports matters less—they are enthusiastic about a sport or a player that is often personal to them rather than those around them, and they are the most likely of any group to watch sports solo. Put another way, when they tune into sports, they tune everything else out. Sports viewing is escapist ‘me-time’, and the outcome of the games matters less than simply indulging in a sport they love. As such, they are the least likely of any segment to care about predictions (53% of Soloists care about predictions vs. 71% of sports streamers overall), game analysis (50% vs. 70%) or social media commentary (56% vs. 65%). On the opposite end, they are the most likely of the segments to say their full attention is on the game; if they are doing something else while watching the game, they’re eating and drinking rather than scrolling and posting. Notably, they have a penchant for boxing and UFC, and because of their highly personal relationship to sports, they are akin to Nichesters in their specificity of sports fandom: 63% appreciate niche content, or information about sports and players, that is out of the ordinary as compared to 60% of sports fans overall.



“During the [past few years], I realized that watching sports was therapeutic. I became more of a fan because I had more free time to actually focus my attention on sports that I love and pay close attention to the players and what was going on.”

- Drayson, 40, Bronx, NY



# Soloists

## Streaming Profile:

### Soloists' streaming behavior

**22%** *Stream Only*  
vs. 23% among total sports streamers

**44%** *Stream Most*  
vs. 46% among total sports streamers

**34%** *Stream Also*  
vs. 31% among total sports streamers

## Audience Snapshot:

### Soloists at a glance

**Watching:** Boxing, UFC

**Eating:** Microwaveable foods

**Wearing:** Sweats

**Doing:** Watching the game—no distractions please!

**Following:** Their favorite player over time

**Where you'll find them:** Hulu (No Ads)

## Personal Scorecard:

### Soloists' standout streaming stats

**Sport-centric:** The sport is the main reason they watch; teams matter less

**Solo viewers:** They are the most likely to watch alone; 57% of the times they watch sports they watch alone vs. 53% among other sports streamers

**Highly personal:** They are guided by "personal culture," or their own way of doing things (48% vs. 42%)

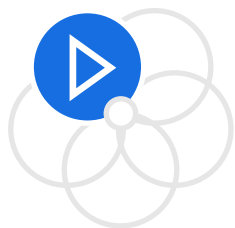
**Escapist:** They are the most likely of the segments to watch sports because it helps them relax, or escape everyday life

**Socially Agnostic:** Along with Classics, the social side of sports isn't particularly interesting to them—47% care about how sports intersects with activism vs. 56% of sports streamers overall

## Most similar to:

**Nichesters:** Sports is a personal experience rather than a team one

**Classics:** Sports viewing is about indulging in something you love rather than engaging in all of the activities that surround it



## Classics

# 20%

of sports streamers

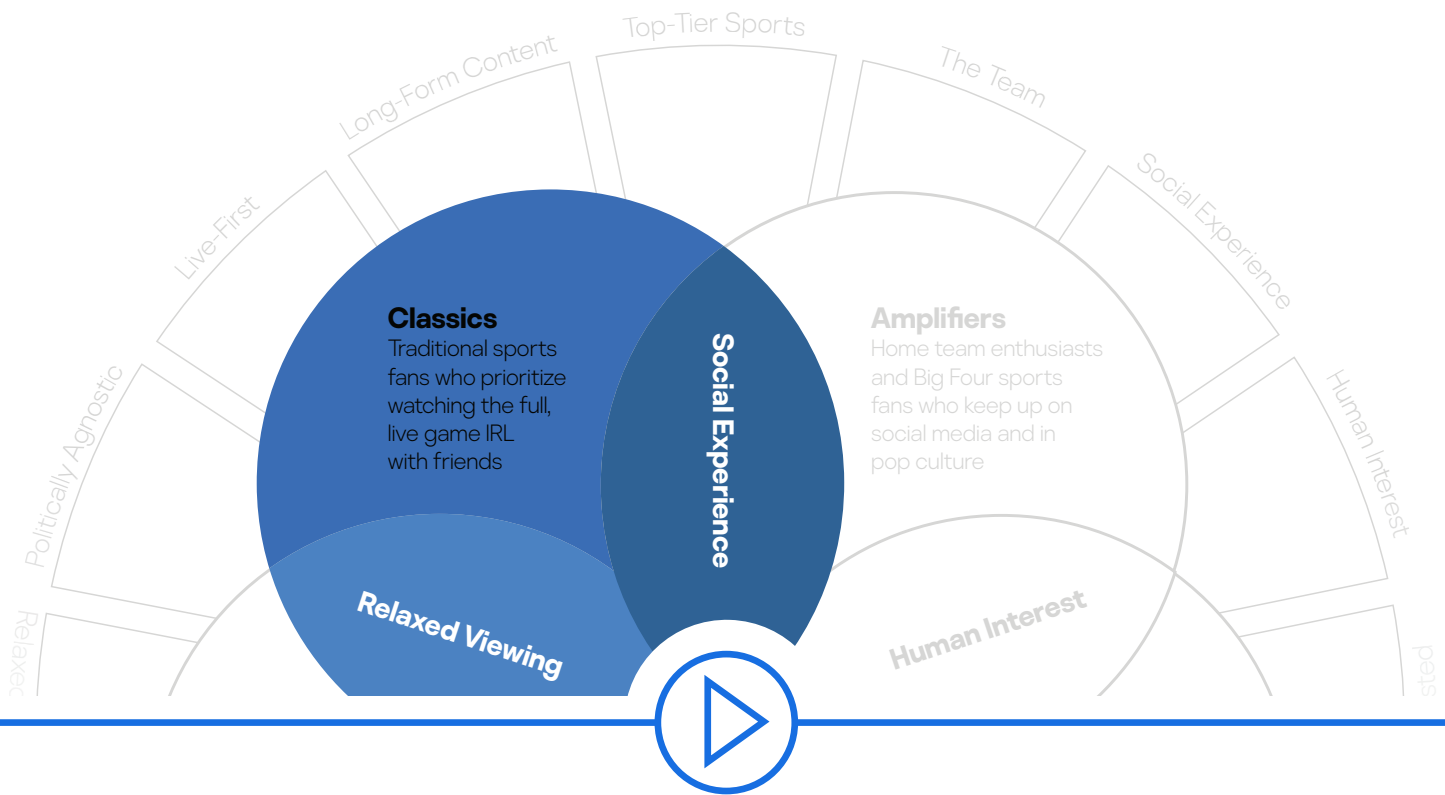


If there's any sports streaming fan who resembles classic Americana culture, it's the Classics. They are Big Four fans who, like previous generations, can't think of a better way to enjoy the big game than with friends over chili and wings. Notably, it's important for this group to not just catch full games, but to catch full games *live*. **The social aspect of sports for this group is key and it's decidedly of the IRL variety: they are hanging out with friends, cooking, eating and drinking while watching the game, rather than posting, tweeting or group chatting.** Self-described as hard working, easy-going and pet loving, they are keeping sports viewership real, albeit via streaming.



“My husband and I really enjoy big sports events where we can throw a party, invite people over, have a lot of food, and watch together. Sports is something that we definitely share with others.”

- Danielle, 37, Brooklyn, NY



## Classics

### Streaming Profile:

#### Classics' streaming behavior

**23%** Stream Only  
vs. 23% among total sports streamers

**40%** Stream Most  
vs. 46% among total sports streamers

**37%** Stream Also  
vs. 31% among total sports streamers

### Audience Snapshot:

#### Classics at a glance

**Watching:** The big game

**Eating:** Chili & wings

**Wearing:** Team jersey

**Doing:** Cooking, eating and socializing IRL

**Following:** A new player—just because they're old school it doesn't mean they don't like new talent

**Where you'll find them:** Hulu (ad-supported)

### Personal Scorecard:

#### Classics' standout streaming stats

**Big Four Fans:** They are most likely watching the NFL, NBA, MLB and NHL

**Love for live:** 80% say watching the game when it happens is important vs. 77% overall

**Full games:** 81% say it's important to watch full games from start to finish vs. 77% of sports streamers overall

**Chill:** They are even-keeled and happy to be watching the game with friends—the outcome of the game matters less and, alongside Soloists, they are the least emotionally invested in the game

**Neutralists:** They are the least likely of all sports segments to care about how sports intersect with race and social activism (45% vs. 56% of sports streamers)

### Most similar to:

**Amplifiers:** They tune into Big Four sports and enjoy watching with friends

**Soloists:** Sports viewing is about indulging in something you love rather than engaging in all of the activities that surround it

# SPORTS FANDOM 360 BRAND TAKEAWAYS

As sports streaming continues to broaden the industry's fanbase, **these rising psychographics are reshaping the sports viewing experience and are carving out the new experiences and content sports fans are looking for next.**



**Streaming, social media and younger generations are changing who sports fans are and what they want from their sports experience.**

Think about how your brand can align with the Amplifiers, Universalists, Nichesters, Soloists and Classics.



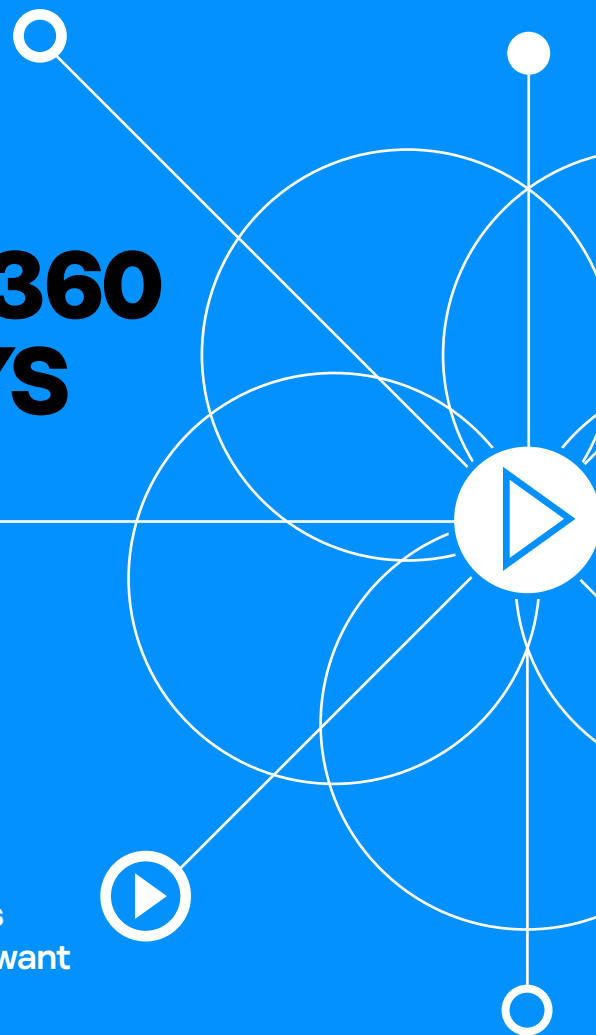
**The Amplifiers, Universalists and Nichesters reflect the next generation of sports fans.**

These are the influencers of sports streamers as they are trend-forward, digitally-savvy and socially connected. Taken together, they represent over half (61%) of all sports streamers, so capturing their attention is key.



**Keep in mind that these psychographics aren't necessarily static.**

As sports streamers enter different life stages and phases their sports viewing behavior will naturally change.





# Generation STREAM

## SPORTS EDITION

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