

A close-up photograph of a young Black man with short hair and glasses, looking down at a smartphone held in his hands. He is wearing a red jersey with yellow and blue stripes on the sleeves. The background is a blurred teal color. The entire image is framed by a thick blue border.

Generation STREAM

SPORTS EDITION

Presented by Disney Advertising

THE SCORECARD

Disney Advertising

Introduction to Generation Stream: Sports Edition

The year 2020 created unique, never-before-seen moments that impacted not only the world around us, but also the world of sports. Fan-filled stadiums became spectatorless, pregame tailgates turned into at-home experiences, and new sports interests came to the fore. Despite these changes, sports fans maintained their fandom, with the caveat of having to renavigate their sports experience throughout the pandemic. One of the silver linings for sports viewers is the myriad of virtual experiences that further diversify the ways in which they can fan sports.

Much of what's driving this anytime and anywhere access to sports content is streaming, which is enjoyed by 90% of Americans 13-to-54. Not only has streaming changed the distribution of entertainment, it has also altered the expectations of it.

We explore 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.

Today, The Walt Disney Company is extending this streaming exploration into the realm of sports, with Generation Stream: Sports Edition. This body of work explores the new generation of sports TV streamers to understand their behaviors and motivations, and to uncover trends that inform the future of sports, fandom, and consumption.

In Generation Stream: Sports Edition, we surveyed 2,500 sports streamers ages 13-to-54 across the U.S. to learn about who they are, the ways they fan, and how they watch sports. We delve into sports streamers, who are defined as individuals who self-identify as sports fans, use streaming services to watch some or all of their sports content, and have watched a live (or not live) sports event, sports highlight, and/or sports-related video within the past three months. The findings of Generation Stream: Sports Edition are captured in five, soon-to-be-released reports—Sports Unleashed, Complete Athlete, Digital Rituals, Outer Rings and Sports Fandom 360—each of which tells a distinct story of the sports streaming experience today.

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



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.



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

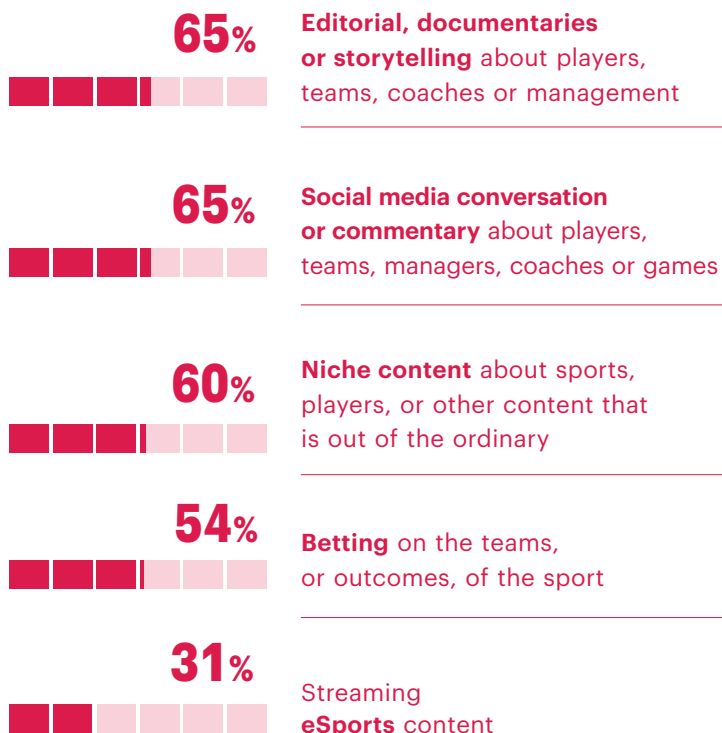
Off Field

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.

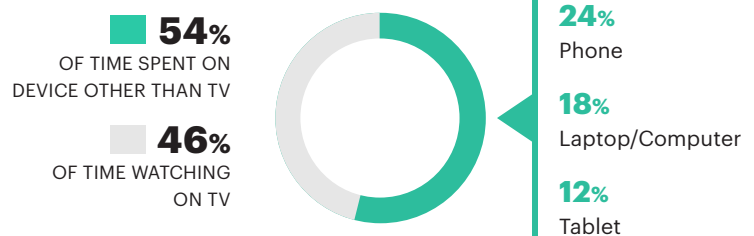
TV continues to be the dominant platform for consuming sports content across demos. However, screens, themselves, are tipping digital with Millennial and Gen Z sports streamers spending more time watching on phones, tablets and laptops.

76%

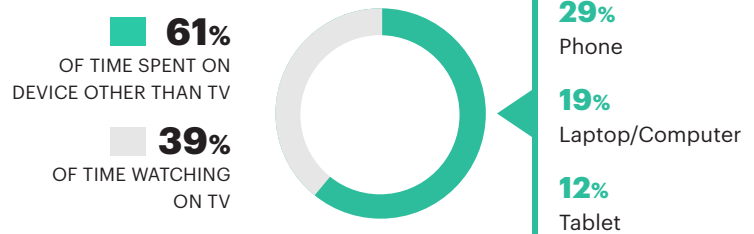
of sports streamers are engaged in one or more second screen activities when they watch sports.

TIME SPENT CONSUMING SPORTS CONTENT ACROSS DEVICES

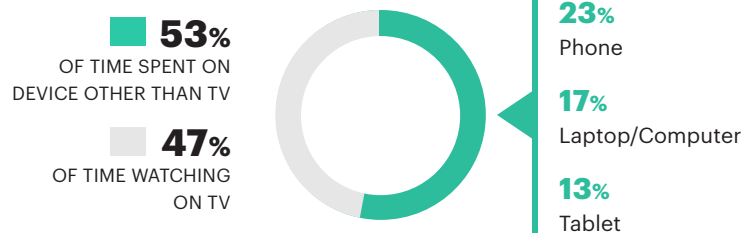
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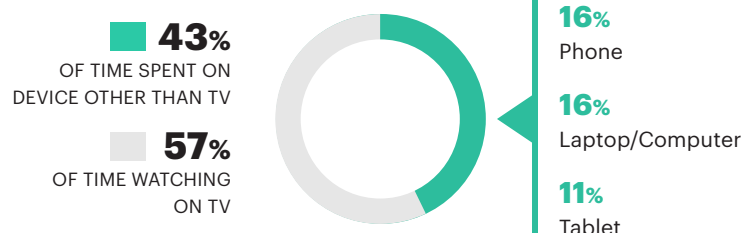
Gen Z



Millennials



Gen X



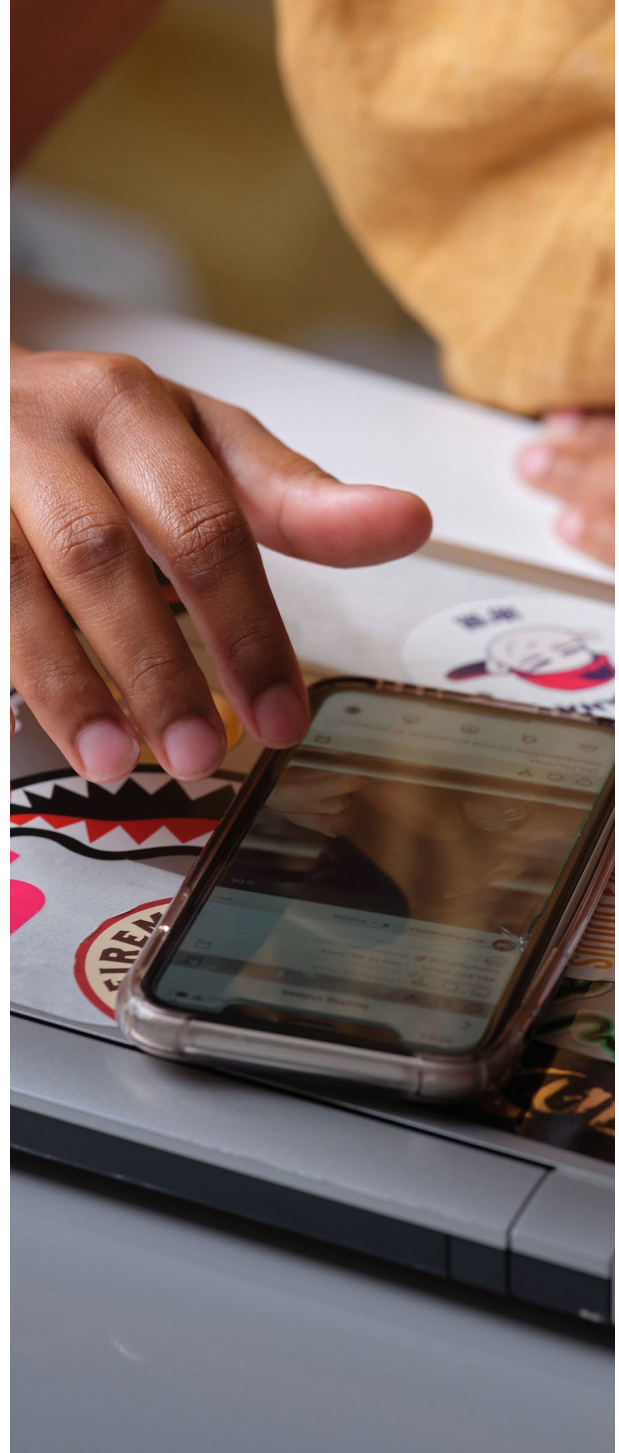
Social Gameplay

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

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THE SCORECARD

This is just a first look at Generation Stream: Sports Edition. Stay tuned for the release of four upcoming trend reports and a segmentation report, which dive deeper into the sports streaming experience today, and where it is headed next.