



Generation STREAM

SPORTS EDITION

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SPORTS UNLEASHED

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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%).

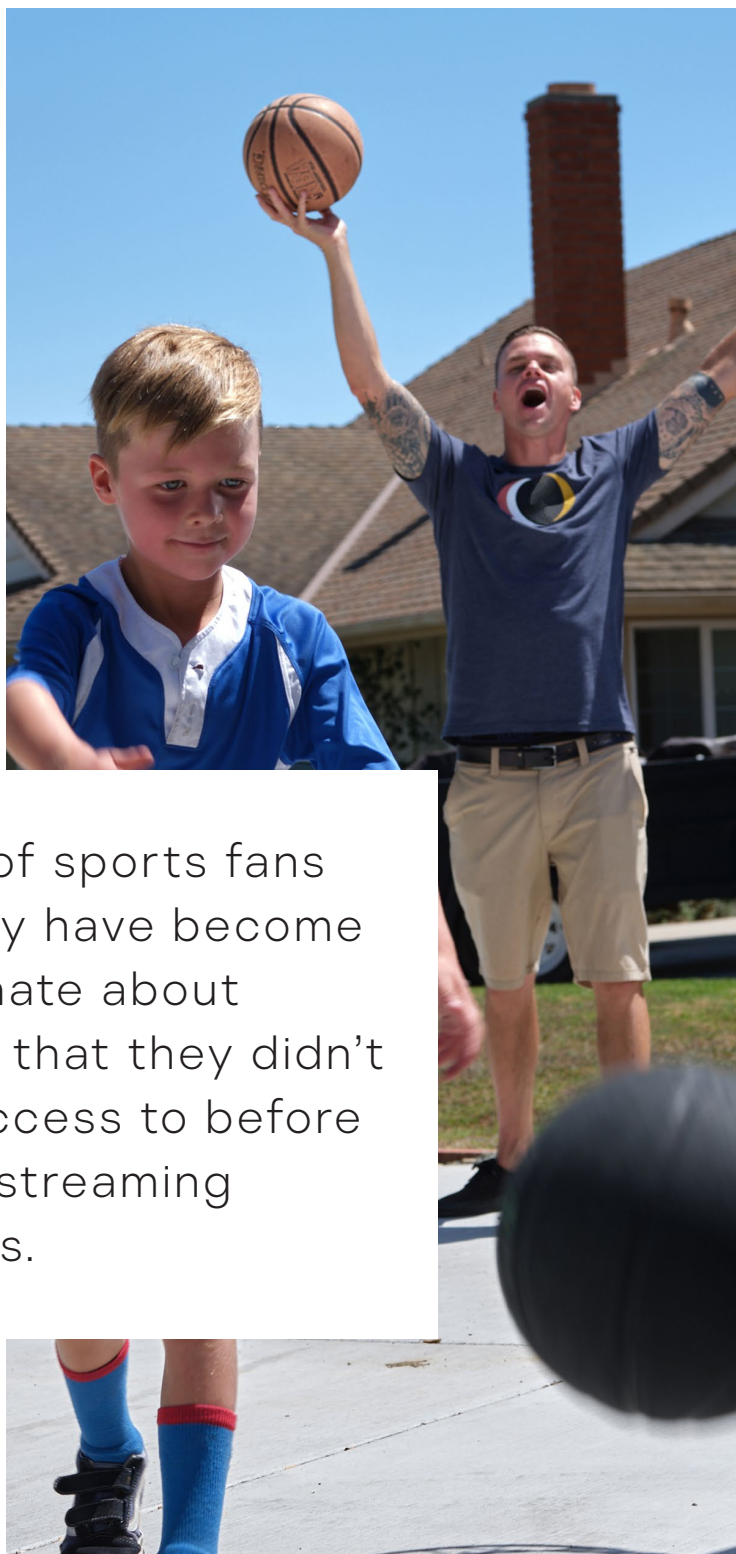
Furthermore, sports fans are watching in a number of ways: 64% binge sports content and one-in-five (19%) follow multiple games at once across various platforms and devices. In fact, young people are more likely than the previous generations to watch sports on a variety of platforms and devices. Additionally, 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.



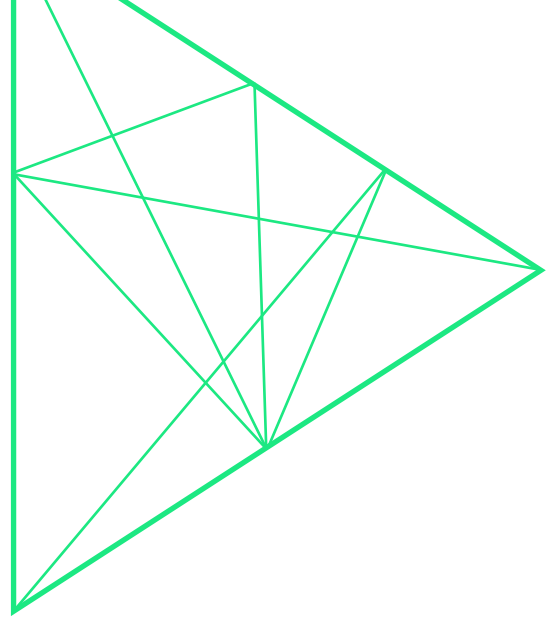
68% of sports fans say they have become passionate about a sport that they didn’t have access to before sports streaming services.

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.”

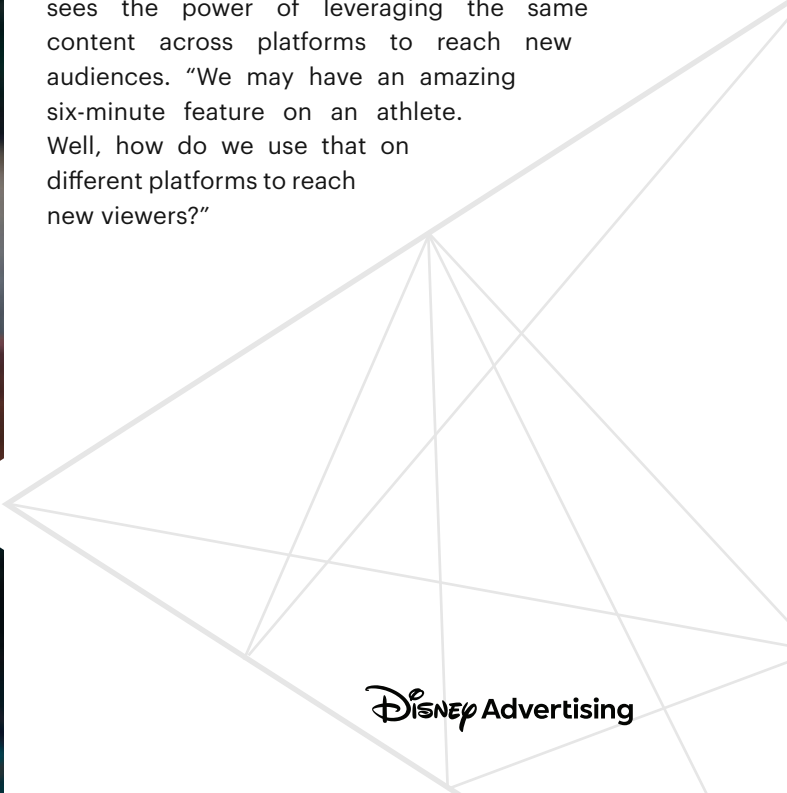


However, like Ryan, these new formats are only making Rose want to cast an even wider net. “Non-traditional sports need to have a bigger platform of visibility,” Rose told us, mentioning that she’d be interested in programs on adaptive, niche and international sports. We heard this cry for more—more 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.

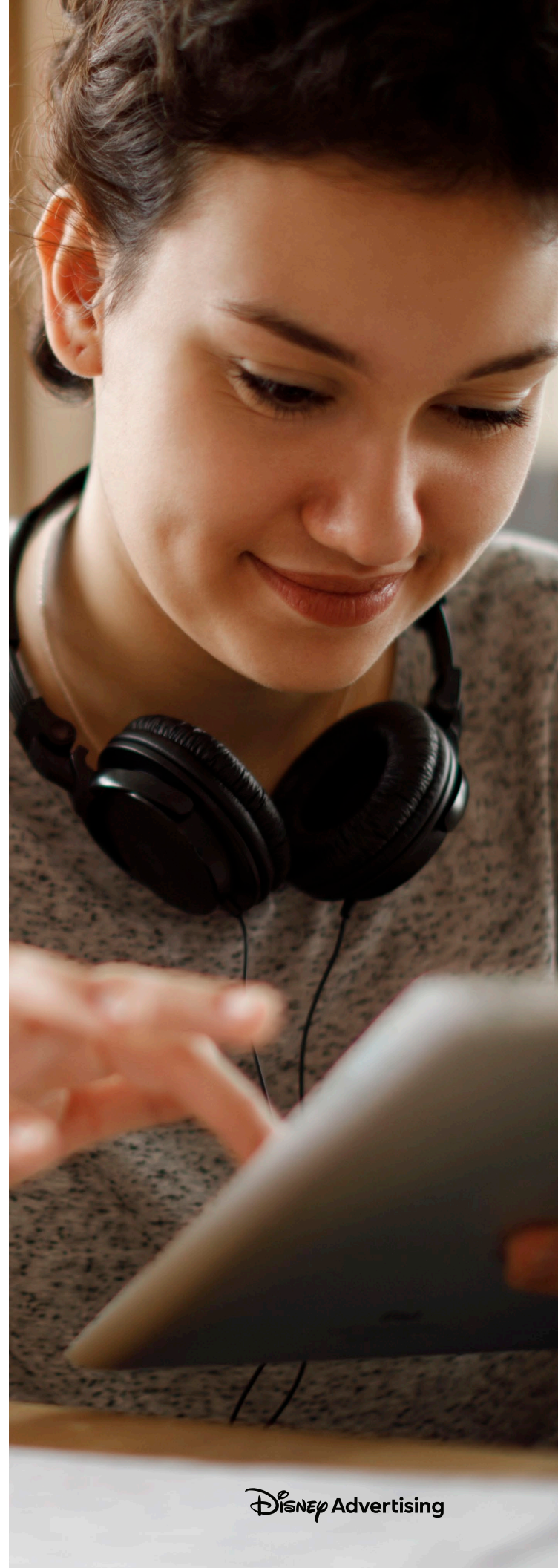
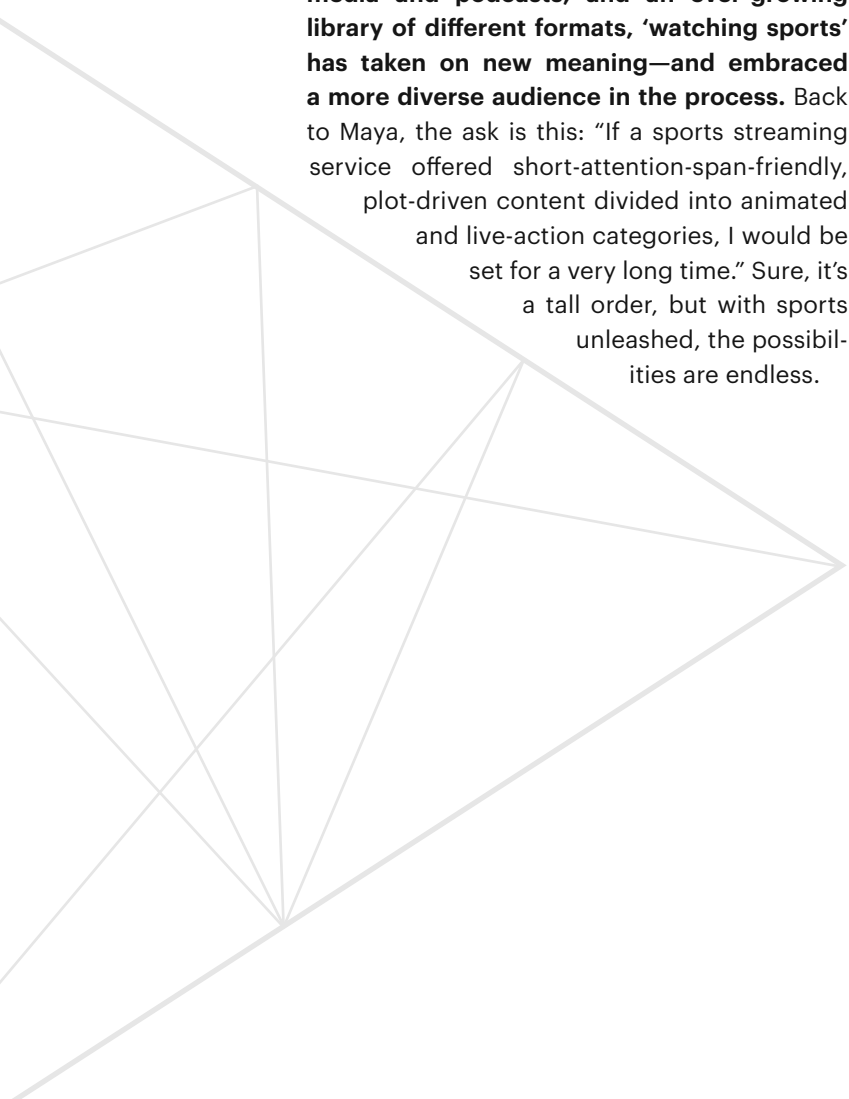
But coming together to watch the game isn't always seamless, which is frustrating for fans like Ryan. Because of local blackouts, the same platforms that are expanding his sports horizon are also cutting him off from his community. "My kids will grow up rooting for some team other than the Cubs, even 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.