



Generation STREAM

SPORTS EDITION

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DIGITAL RITUALS

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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 "throng 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

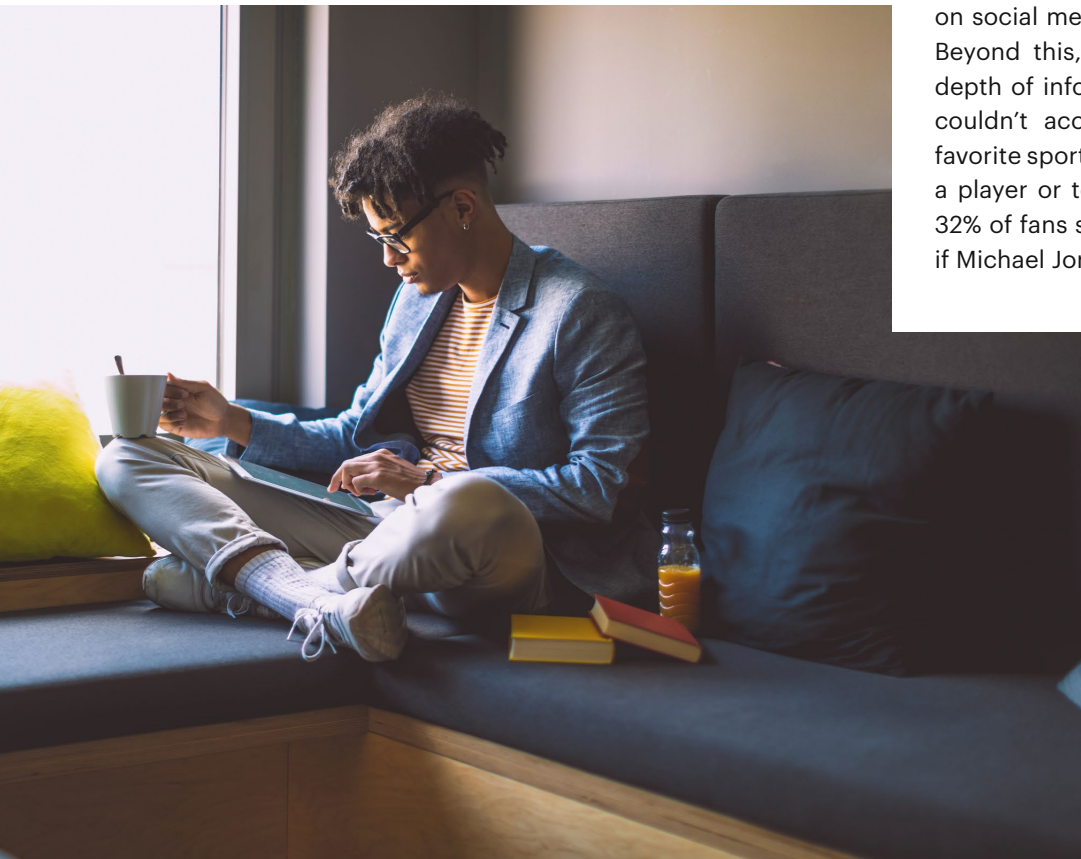


▶ **71%**

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.

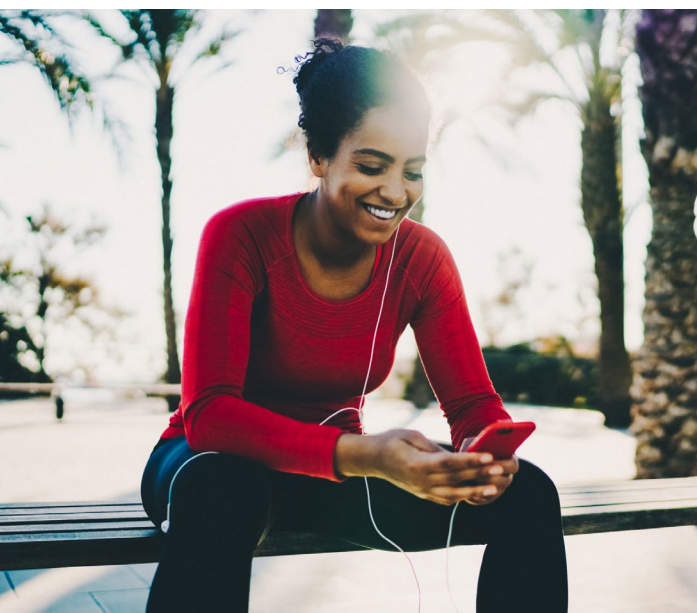
“I use ESPN+ to help curate my sports viewing experience because it allows me to get updates on what's going on in training camps, or who is a potential risk for not making the roster.”

- 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.

