

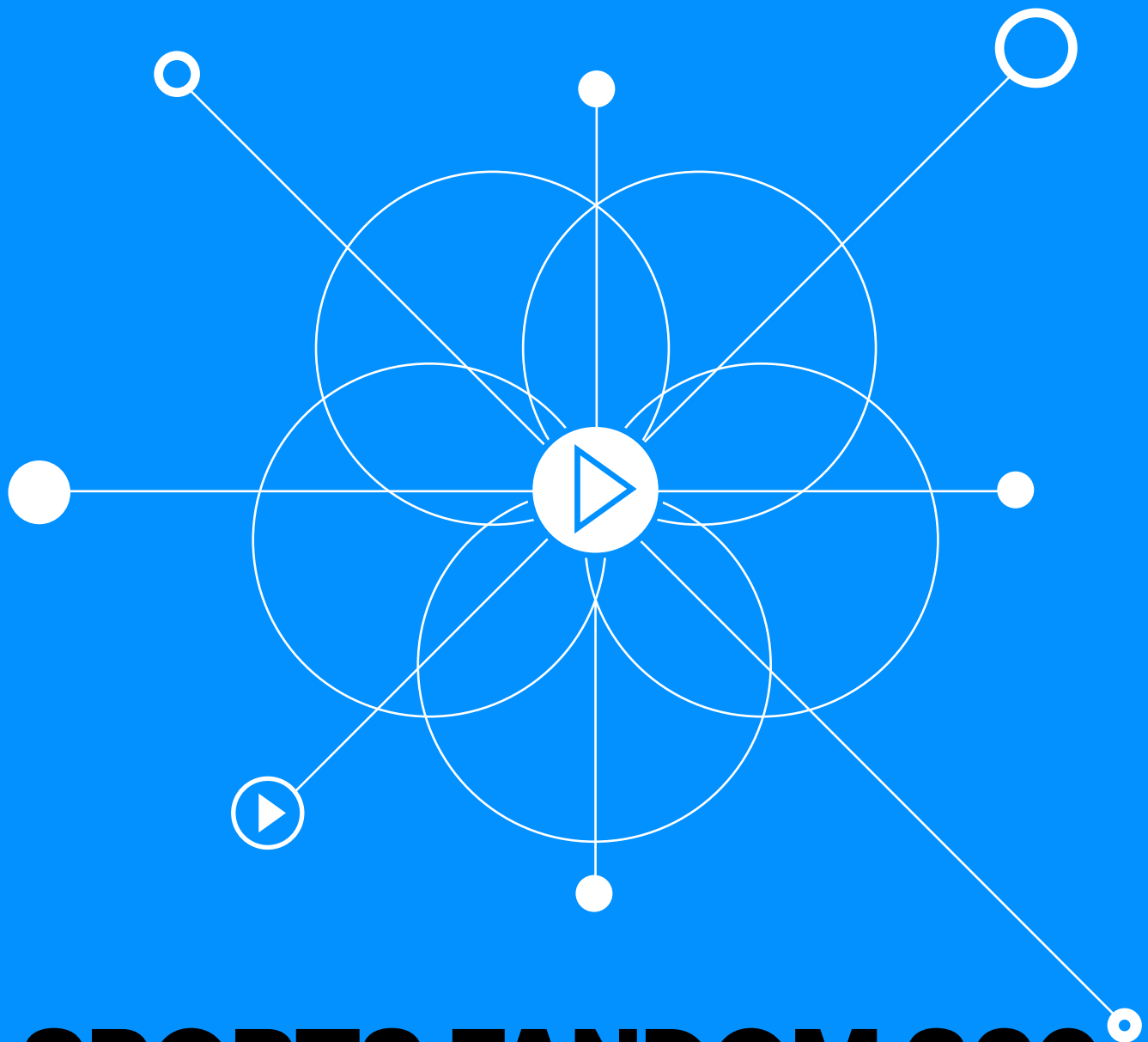
Generation STREAM

SPORTS EDITION

Presented by Disney Advertising

SPORTS FANDOM 360

Disney Advertising



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

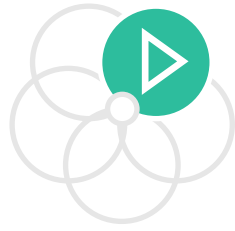
41% I watch more of my favorite sports

35% I watch a larger variety of sports



Meet the audiences shaping the future of sports fandom.





Amplifiers

17%

of sports streamers

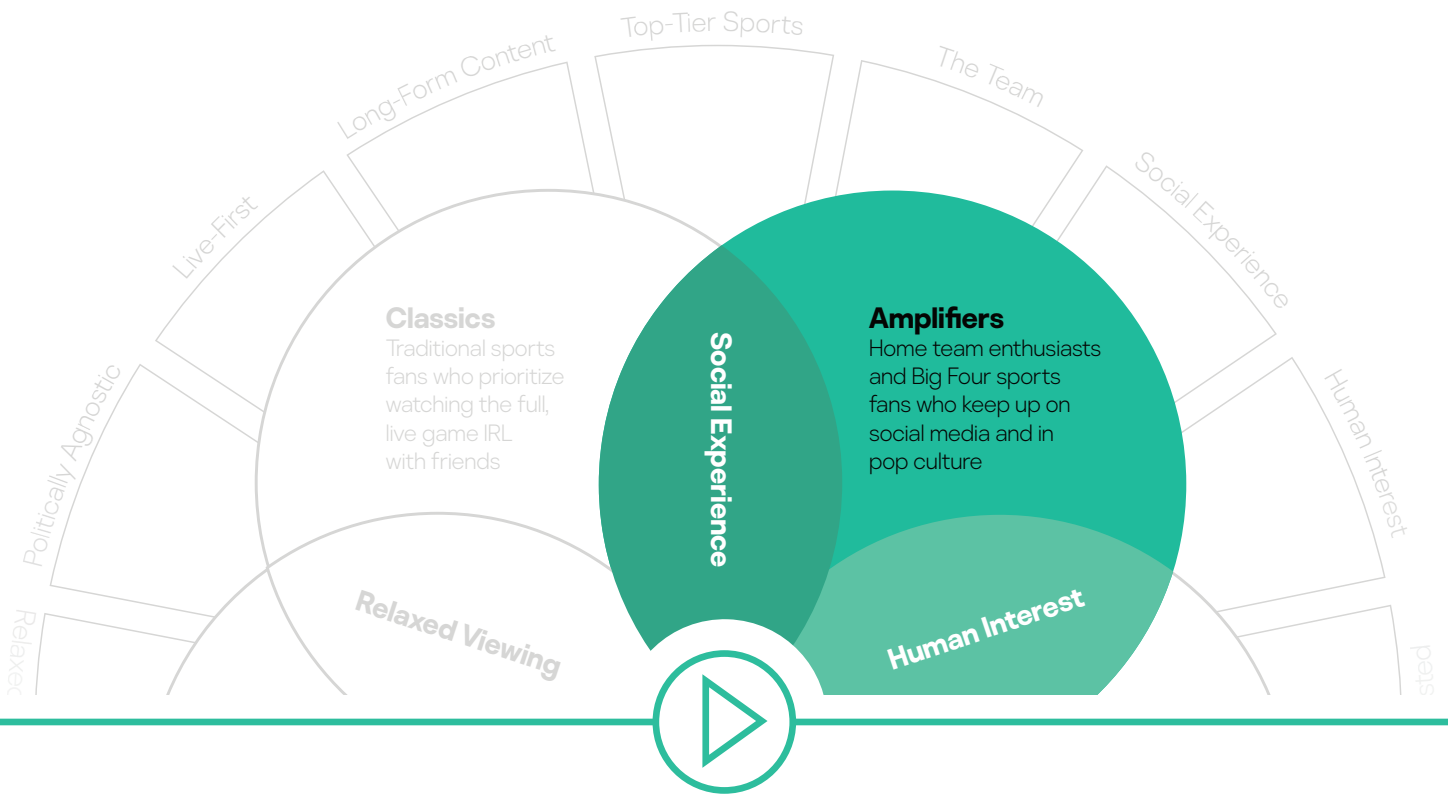


It could be easy to brush off the Amplifiers as another generation of cheerleaders. They follow the Big Four, root for the home team, are emotionally invested in the game and ultimately see sports as a social experience—what’s the point of watching without family, friends and food? **But think of the 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:

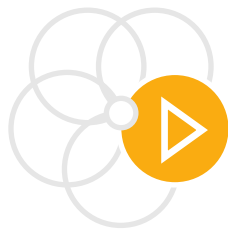
Classics: They tune into top-tier sports and enjoy watching with friends

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

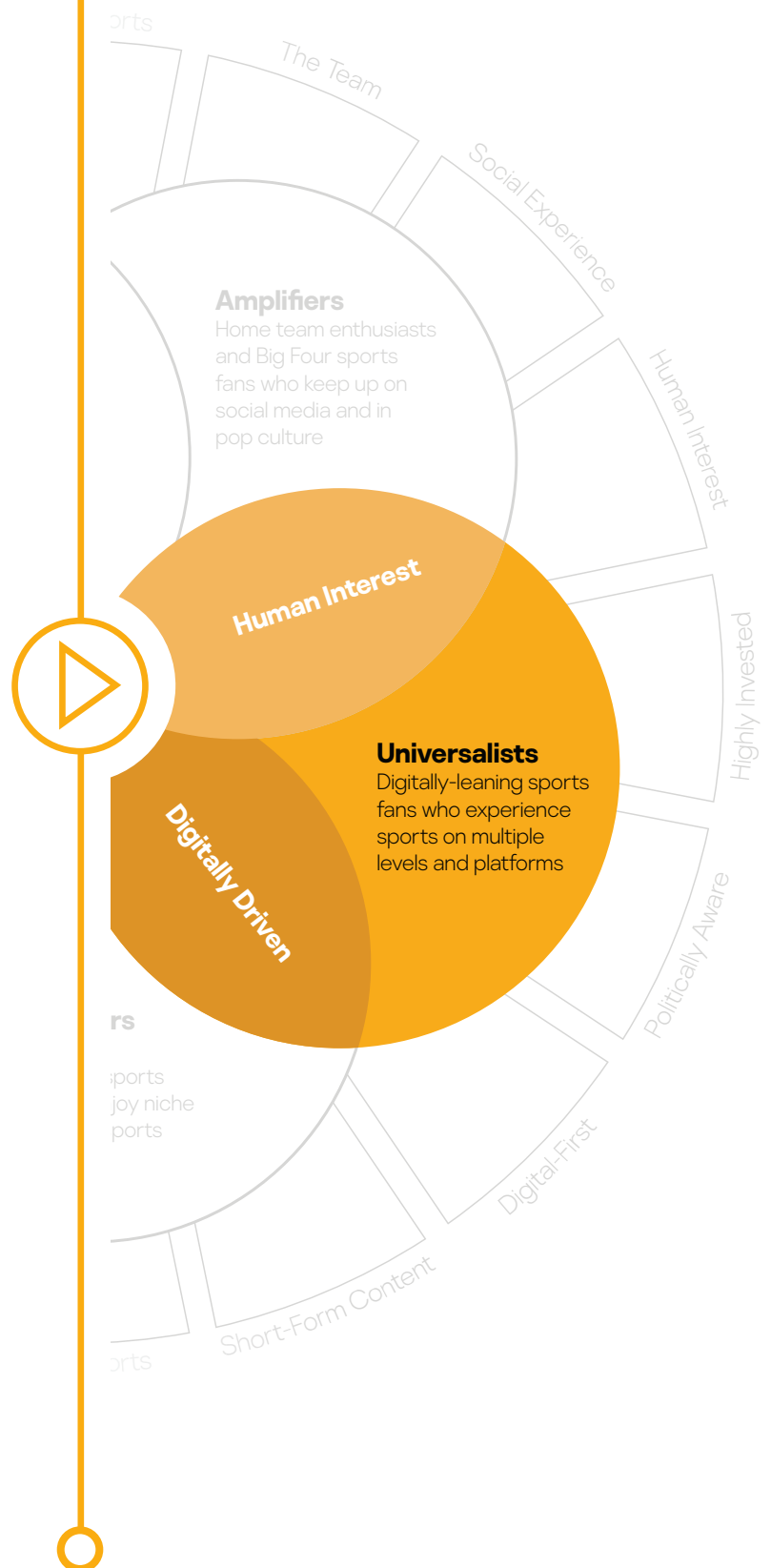
Socially Active: They are the most likely to follow a player or team because of their social activism (23% vs. 18% of sports streamers overall)

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

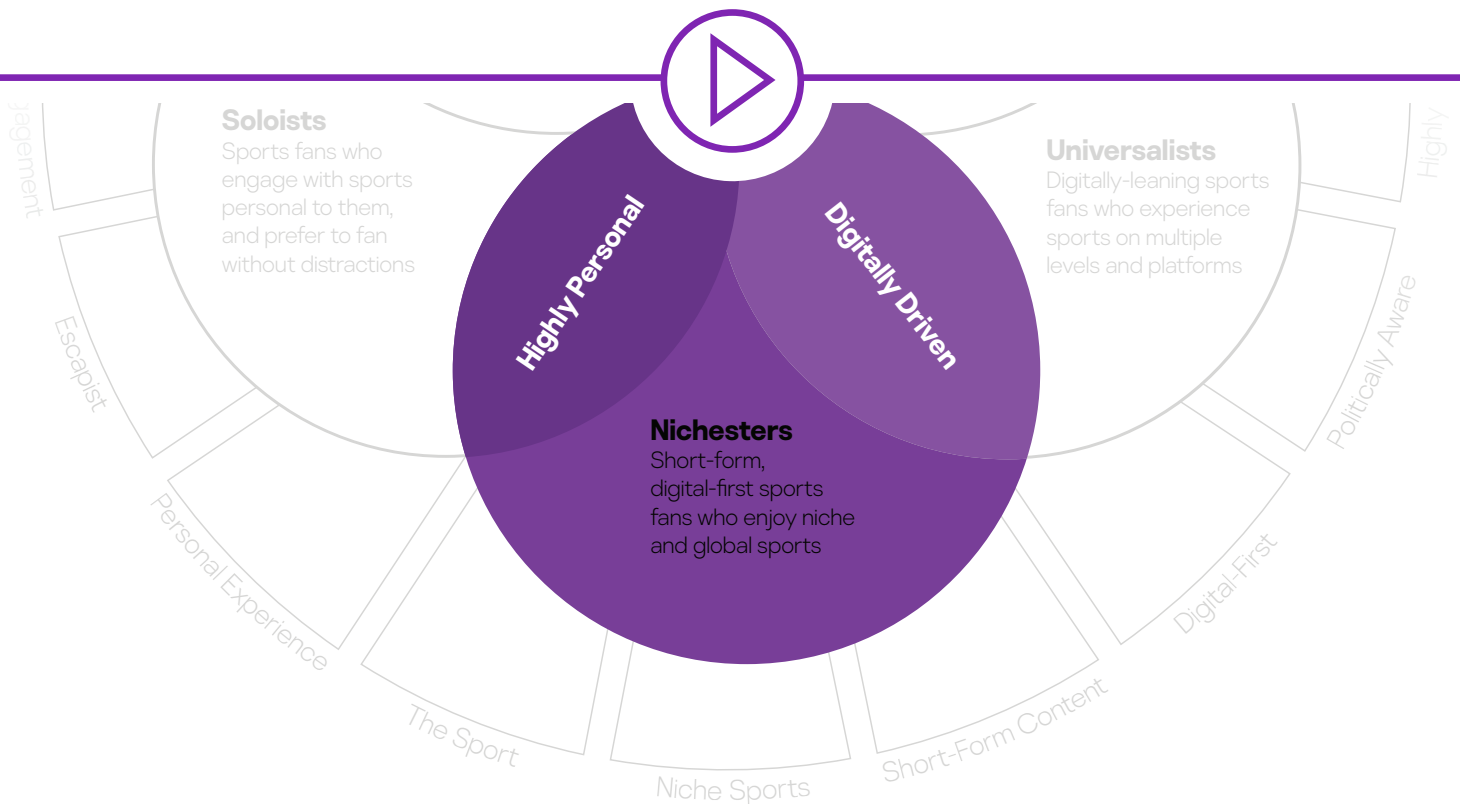
Location agnostic: Only 16% are exclusive fans to a team geographically close to them vs. 23% of sports streamers overall

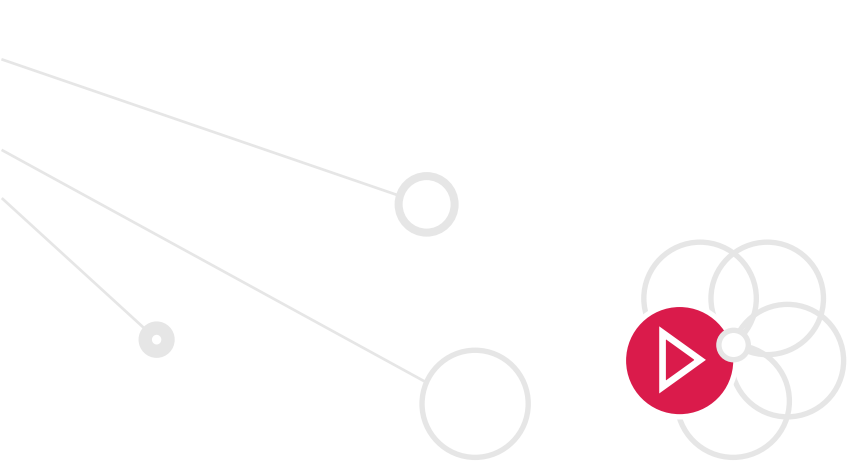
Looking for inclusivity: 52% say it's hard to find an inclusive sports community vs. 45% of sports streamers overall

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%)

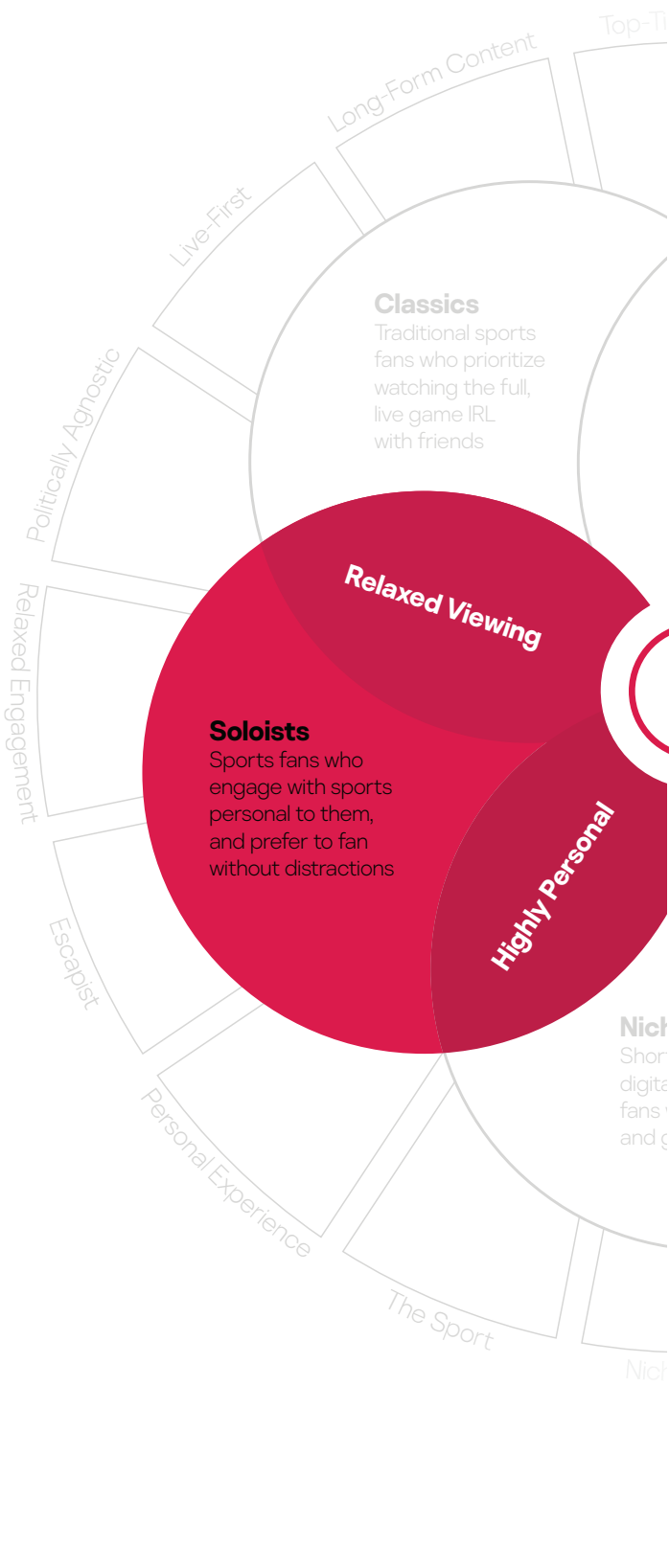
Escapist: They are the most likely of the segments to watch sports because it helps them relax, or escape everyday life

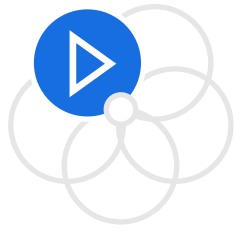
Socially Agnostic: Along with Classics, the social side of sports isn't particularly interesting to them—47% care about how sports intersects with activism vs. 56% of sports streamers overall

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

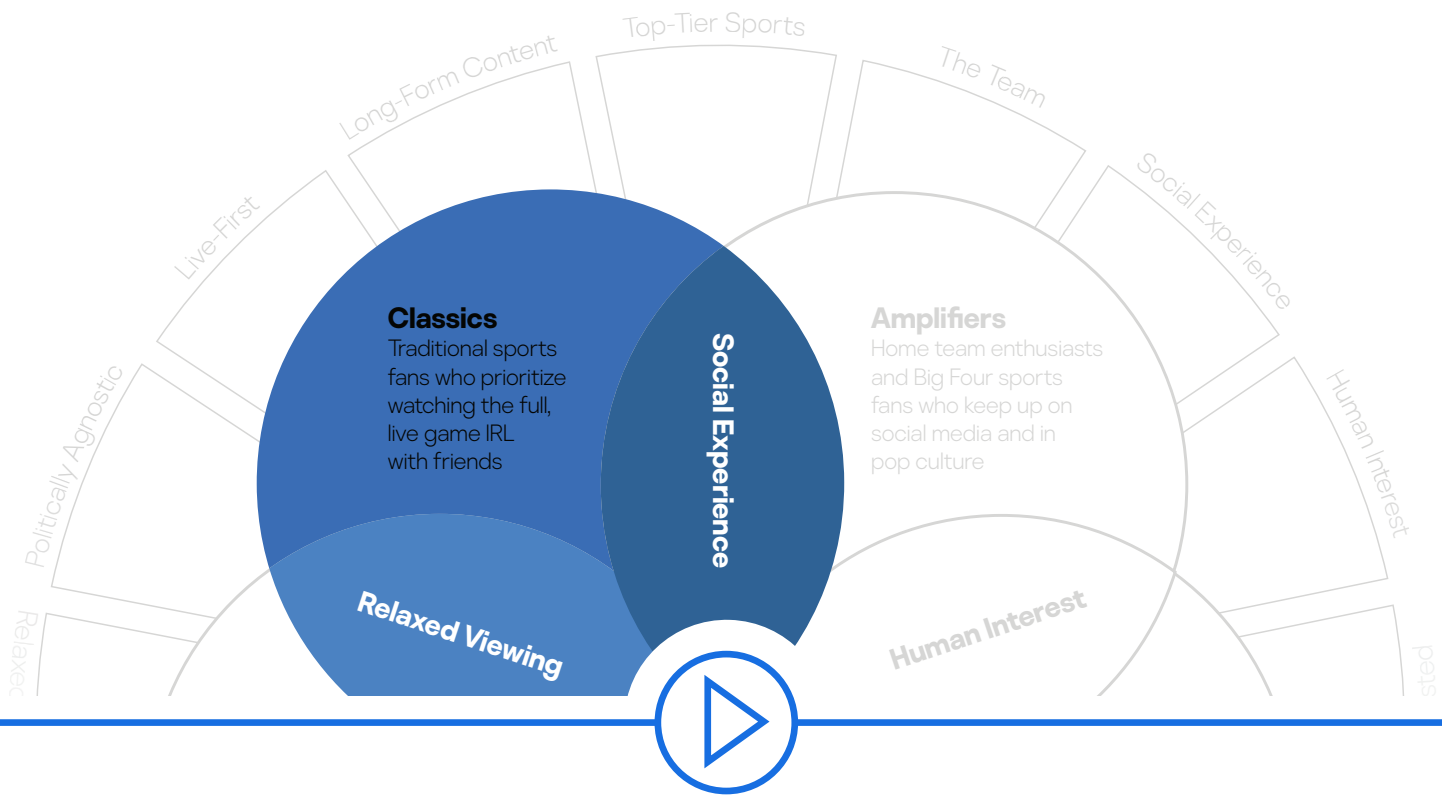


If there's any sports streaming fan who resembles classic Americana culture, it's the Classics. They are Big Four fans who, like previous generations, can't think of a better way to enjoy the big game than with friends over chili and wings. Notably, it's important for this group to not just catch full 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.