

REPORT

SWITCHED ON SUPERFANS

FROM BOOMERS TO GEN Z, THE CHANGING
VIEWING HABITS OF THE SPORTS SUPERFAN



 **imagen**
from Reuters

WWW.IMAGEN.IO

INTRODUCTION

WELCOME TO THE AGE OF THE ATTENTION ECONOMY...

The extensive research we have undertaken with the most passionate fans of America's main pro-leagues indicates a seismic generational shift in fans' relationship with content.

Fandom is no longer about just watching games, with dedicated fans indulging their passion to new levels thanks to the range of video content available, and their ability to interact with it.

- **80%** of those aged 18-26 will typically watch sport from their mobile phone while out^[1]
- **74%** of young adults get most of their sports content from social media^[1]
- **80%** of Gen Z fans follow a professional athlete online^[2]

Whilst the live experience is far from dead, the emphasis younger generations place on the content that surrounds it should dictate how clubs develop content strategies and utilize technology to turn followers into lifelong superfans.

"One of the emerging trends in sports content consumption is on the social media side – TikTok, Instagram, Facebook content that's short form.

This content enables content creators (on behalf of their teams and organisations) to create deeper bonds between the fan, the watcher, the consumer and the player, the competitor and the team. Show behind-the-scenes or mini-series type content that people can digest really quickly and easily, and it creates a much deeper bond."

**NICK ASHWIN,
CRO AMERICAS, IMAGEN**

[1] <https://nypost.com/2023/06/20/gen-z-enjoy-live-sports-less-than-other-generations-poll/>

[2] <https://www2.deloitte.com/us/en/insights/industry/media-and-entertainment/immersive-sports-fandom.html>





METHODOLOGY

A 15 minute online survey of 1,866 American and Canadian sports fans & super fans, split equally between the following leagues:



The sample selected was broadly representative of the North American population as a whole, across age, gender, ethnicity, and income.

Fans were defined on a five-point scale, and at a minimum watch/attend multiple games a season and seek out information on their preferred league on a frequent basis.

DEFINING GENERATIONS

For this study the generations have been defined by the following ages, in accordance with Pew Research Centre definitions:

1946-64

B

BABY BOOMERS

55 – 73 years old

1965-80

X

GEN X

39 – 54 years old

1981-96

M

MILLENNIALS

23 – 38 years old

1997-
Onwards

Z

GEN Z

18 – 22 years old

WEIGHTING THE DATA

The data was weighted to ensure each league's sample comprised 25% of every generation, ensuring that league results are comparable and not skewed by sample composition.

CONSUMPTION

LEAGUE AND GENERATIONAL DIFFERENCES

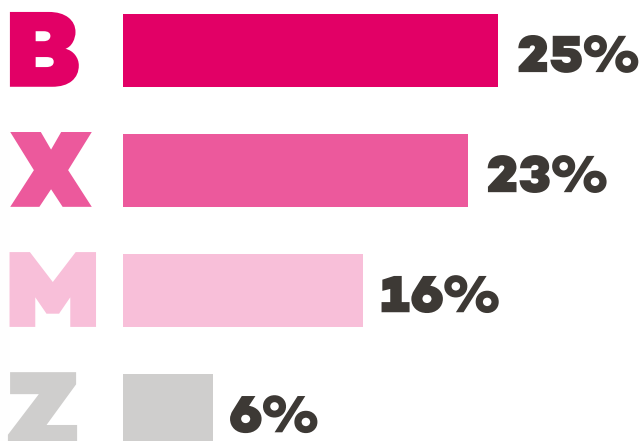
Our research indicates a significant generational shift in non-game content consumption.

Sport, unlike almost any other form of entertainment, transcends age groups in building communities around teams. But there is a growing divide in how it is consumed. Younger generations watch a much higher proportion of non-live content, and in the case of Gen Z, this appears to be at the expense of live game viewership. Even when Gen Zs are watching live, it's likely the game won't have their full attention.



CONSUMPTION OF NON-GAME VIDEO CONTENT BY GENERATION

% stating they watch 3+ hours of non-game video content a week



+22% MORE GEN Z FANS DUAL SCREEN THAN BABY BOOMERS



"Media consumption is no longer limited to a single screen, even when a big match is on. For many, one screen isn't enough, as the general population has increased its multi-screen viewing activities (social media, texting, playing games, ordering food) by an average of 5% over the last year, with this percentage doubling to 10% among Gen Z." – Nielsen Sports.



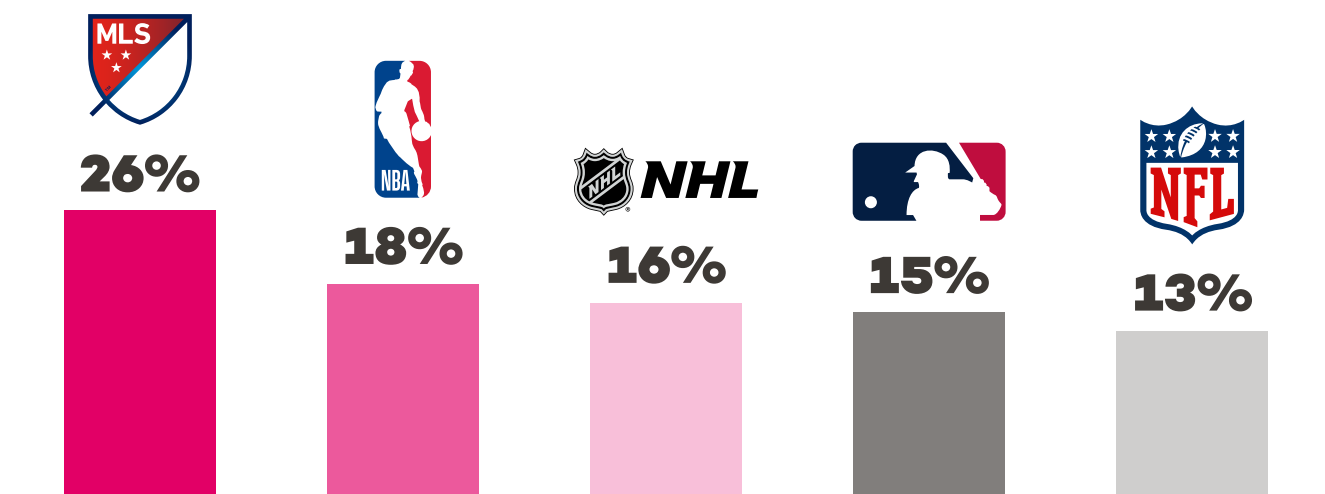
CONSUMPTION

LEAGUE DIFFERENCES

Reflective of the younger fan-base, MLS fans consume higher levels of non-game content than any other league, in fact twice as much as the average NFL fan. "The ultimate aim," observed The Guardian^[3], "is to impel viewers to pay for live sport, but the marketing pitch is becoming more sophisticated, involving a galaxy of add-ons that promise to take us behind the scenes at the world's biggest clubs and reveal the drama, conflict, and personalities that shape sporting dynasties."

CONSUMPTION OF NON-GAME VIDEO CONTENT BY LEAGUE

% stating they watch 3+ hours of non-game video content a week



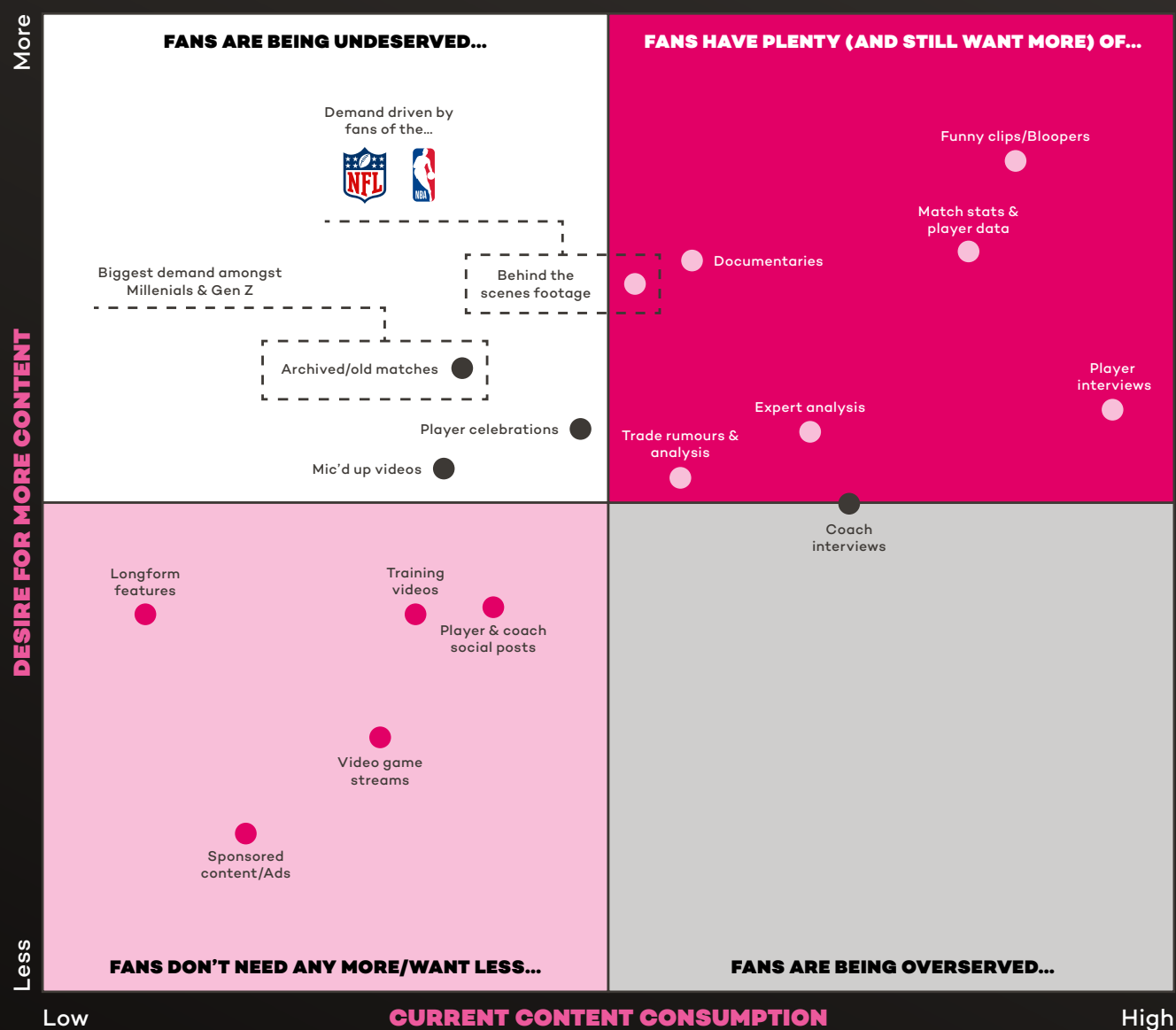
[3] <https://www.theguardian.com/football/2023/oct/19/lionel-messi-mls-apple-tv-documentary-beckham>

SUPPLY & DEMAND

OPPORTUNITIES FOR CONTENT EXPANSION

Whilst the market is successfully supplying the types of content fans want to see, there is still room to expand offerings.

Whether it's discovering the funniest sports videos or re-watching classic moments, fans of all ages regularly seek out and consume new content. Baby Boomers are however more likely to consider the sports content market over-saturated, whilst younger generations feel underserved, indicating untapped potential for rights holders to better utilize their archives to meet the demand for material.



PLATFORM ATTRACTION

OPTIMIZING THE EXPERIENCE

What matters most to fans is accessing the content they want quickly, without obstruction and on their terms.

Easy navigation was cited as the key reason for website/app preference across all ages, with Gen Z in particular prioritizing usability above all other aspects. Speed, quantity and exclusivity were all considered important cross generationally, however older audiences were more likely to utilize websites instead of social media for content consumption.

"Apple TV has given soccer fans something unique: a consistent service and experience for nearly all MLS games." – Matt Devitt SVP, Product Sales and Strategy, Nielsen One^[4].

ISSUES ENCOUNTERED WHEN TRYING TO WATCH NON-GAME VIDEOS

TOO MANY ADS 37%

CLICK BAIT 19%

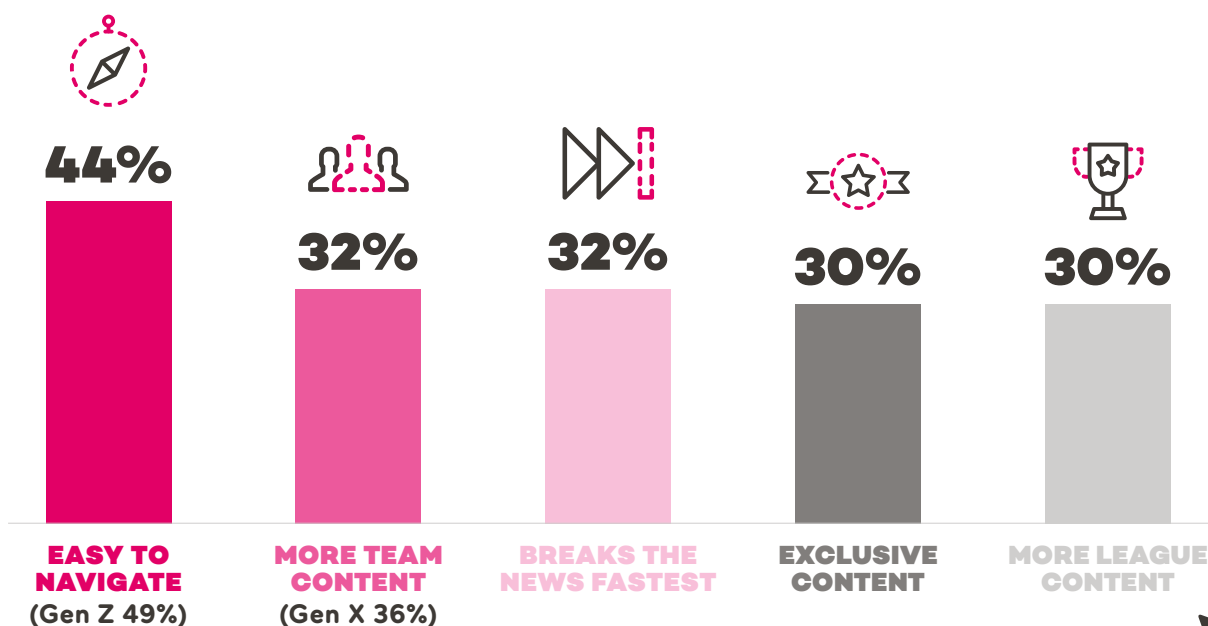
NOT AVAILABLE 16%

POOR QUALITY 15%

CAN'T FIND 14%



TOP 5 REASONS FANS SAY THEY PREFER A WEBSITE TO OTHERS



[4] <https://www.thecurrent.com/fragmentation-live-sports-streaming-nielsen-opinion-data>

MONETIZATION MODELS

AVOD VS SVOD

Though fans complain about advertising, the majority would still rather have ads than pay a subscription for content.

This is echoed in the The Big Shift: Wave II (UK) study^[5], where 68% of respondents displayed a preference for streaming free, ad-supported content than opting for paid subscriptions — 8% higher relative to the US. Around 13% of those polled said they would cancel subscriptions in favour of free ad-supported CTV services.

TOP 5 REASONS FANS PAY FOR A SUBSCRIPTION SERVICE

% stating it's the most important reason



LIVE GAMES

25%



TEAM CONTENT

14%



EXCLUSIVE CONTENT

12%



REMOVE ADS

12%



4K/UHD

11%

[5] <https://lgads.tv/resource/big-shift-uk-wave-ii/>



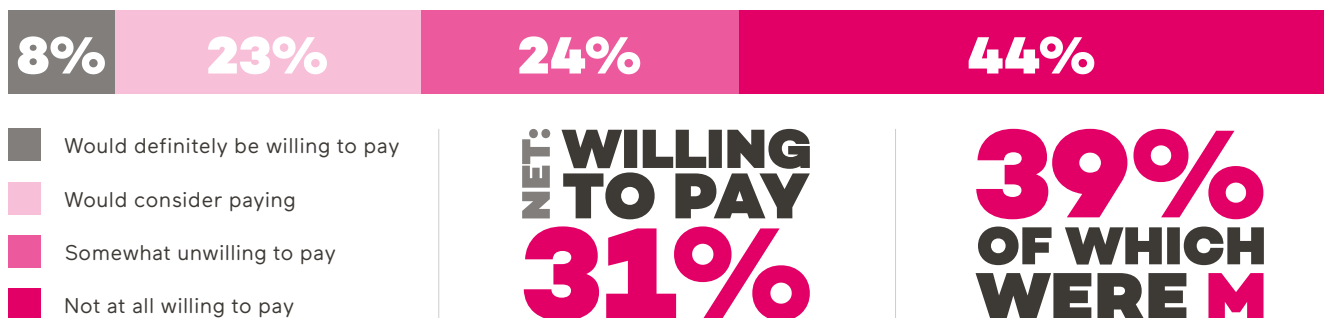


MONETIZATION MODELS

AVOD VS SVOD

Across all generations, the majority of fans would prefer not to pay for exclusive content, however millennials show the greatest willingness to do so. According to Digital TV Europe^[6]: "live Premier League has helped drive [Prime Video] to 13 million subscribers, despite a recent price increase."

WILLINGNESS TO PAY FOR EXCLUSIVE CONTENT



FANS WOULD BE WILLING TO PAY

\$15
PER MONTH FOR EXCLUSIVE CONTENT

\$10
PER MONTH FOR AD FREE CONTENT

[6] <https://www.digitaltveurope.com/longread/sports-rights-scramble/>

ENGAGEMENT

WHAT, WHERE AND WHY?

Millennials' interactions are focused on commenting and sharing the videos they enjoy, whilst Gen Z indicate a stronger preference for self-curation, via playlists, favourites and home screen personalization.

"In the future of sports, the battlefield will be fan engagement. For sports clubs, athletes, and federations, fan engagement isn't merely a strategy; it's the very lifeblood of their existence."^[7]

TOP 5 ASPECTS OF CONTENT ENGAGEMENT

% stating very important

Z + M AUDIENCES COMBINED

SEARCH FOR CONTENT	32%
BROWSE FOR INSPIRATION	26%
REPOST/SHARE CONTENT	24%
COMMENT ON CONTENT	24%
REACT TO CONTENT	23%

MILLENNIAL & GEN Z FANS

44% HAVE SENT THEIR OWN CONTENT VIA A DIRECT MESSAGE



EITHER TO TEAMS OR LEAGUES' OFFICIAL SOCIAL ACCOUNTS.

60% HAVE POSTED THEIR OWN CONTENT PUBLICLY ON SOCIAL MEDIA

[7] <https://worldfootballsummit.com/unlocking-the-future-of-sports-content-blog/>

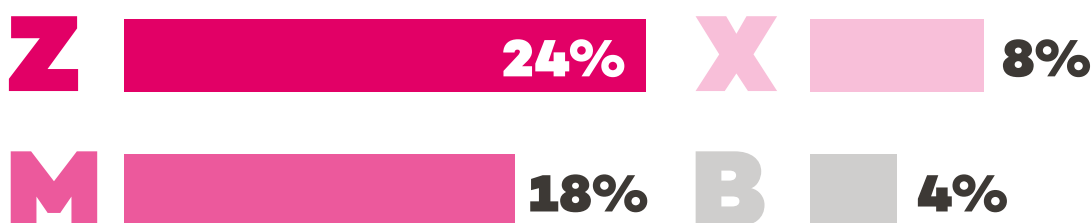
INFLUENCER IMPACT

MAKING THE RIGHT IMPRESSION

Whilst consumption of influencer content is highest amongst GenZ, Millennials are most likely to act after watching influencer video.

Footballers with the biggest social media profiles include Cristiano Ronaldo, Lionel Messi and Neymar. But it's not just players who can drive engagement. Football journalist Fabrizio Romano has over 25 million followers on Instagram, 19 million on X/Twitter, and 2 million subscribers on YouTube.

% OF FANS STATING THEY WATCH INFLUENCER CONTENT ON SOCIAL MEDIA



SAYING THAT, AFTER WATCHING AN INFLUENCER, THEY ARE LIKELY TO...

M **Z**

	FOLLOW THEIR ACCOUNT	61%	60%
	ATTEND A GAME/MATCH	66%	56%
	BUY OFFICIAL LEAGUE MERCHANDISE	59%	52%
	BUY OFFICIAL TEAM MERCHANDISE	65%	50%
	BUY UNOFFICIAL MERCHANDISE	43%	28%
	PAY A SUBSCRIPTION TO FOLLOW THEM	36%	27%
	CREATE THEIR OWN CONTENT	40%	25%

CONCLUSION

Superfans remain as important as ever for team sports. They're the audience most likely to spend on subscriptions and merchandise, amplify club achievements, and attract new followers.

Our findings however indicate a major shift in fan behaviour is taking place and maintaining the devotion of this audience is dependent on more than winning cups and trophies.

For decades teams have benefited from the unique loyalty of their core fan base. They could be counted on to tune in every week to watch them play live, and were satisfied with a largely passive experience, based on playing schedules and weekly shows. However, we are now swiftly moving into an era of active fandom.

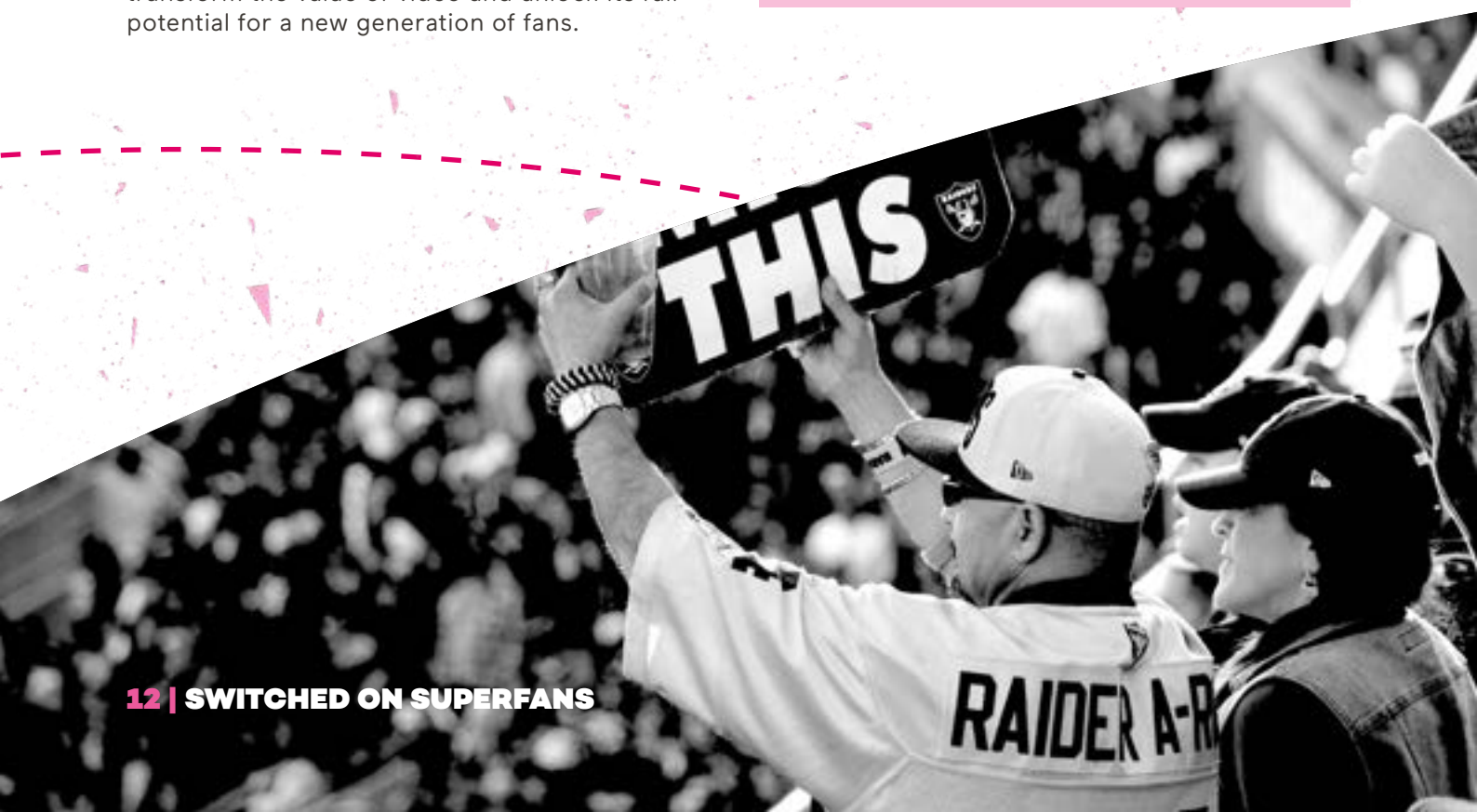
Younger generations expect to be able to fulfil their passions anytime, anywhere, with a consistently high-quality viewing experience. They crave compelling stories and content primed for engagement whilst equally buying into authenticity and heritage.

To satisfy the cravings of this vital audience teams, leagues and rights-holders need to develop video content strategies which address their digital expectations.

At Imagen, we understand how to work with world-leading sports brands to implement such a system. Our intelligent video platform helps to transform the value of video and unlock its full potential for a new generation of fans.

5 DIGITAL TACTICS TO BUILD FAN ENGAGEMENT

- 1** Build relationships with influencers, serving them like traditional media outlets by providing access to exclusive media and integrating their presence onto official channels.
- 2** Drive value from content archives, creating compelling short-form content which draws on club heritage and re-purposing clips for use on social media.
- 3** Optimize video archives for efficient search, and enable content to be auto-distributed to online endpoints, where fans can curate their experiences via playlists, recommendations, and user groups.
- 4** Embrace fans' content submissions to contribute their own material. Enable them to set-up simple portals that allow for easy submission, and promote their contributions across official channels.
- 5** Add watermarking and pre-rolls to video clips to ensure brand visibility is prominent, even where content is shared away from its original source.



TAKE YOUR SPORT TO THE NEXT LEVEL WITH IMAGEN

Imagen is an intuitive and intelligent video management platform that enables sports organisations and media companies to secure, manage and distribute their video media.

THE KEY FEATURES OFFER:



SECURE STORAGE

Automated workflows upload and archive your content quickly, it takes a few clicks to ingest and transcode multiple files.



ACCELERATED FILE DOWNLOADS

Deliver high-resolution files to broadcasters and media partners in seconds.



POWERFUL CATALOGUING

Add rich metadata quickly with Imagen's cataloguing and shotlisting tools. Artificial intelligence features generate rich searchable metadata.



LIVE CONNECT

Live stream, archive, or clip and publish incoming streams in real-time.



RIGHTS MANAGEMENT

Digitise, manage and control the most complex of media rights contracts with Imagen's bespoke permissions.



AUDIENCE ANALYTICS

Drive user engagement and improve ROI across your archive with simple to use dashboards.



BROADCAST OPERATIONS

Automate bespoke and professional packaging and delivery of content to broadcast partners.



ABOUT IMAGEN

Imagen is the leading cloud-based media asset management platform. Used by media companies, sports brands and enterprise organisations who own and manage large amounts of video content, it enables them to drive more value from their content libraries.

All these organisations face the same challenge: how to store, manage and distribute media content fast and securely across borders and boundaries.

Imagen provides a convenient and cost-effective way to manage, market and securely deliver large volumes of high-resolution video content.

Media executives can manage content easily, find footage fast, and get it out to stakeholders around the world with ease, even at huge file sizes. With lightning quick, secure and highly controlled cloud-based access to video content, Imagen protects the past and preserves media for the future.

Companies like the English Premier League, Chelsea Football Club, WTA Media, IMG Replay, MLB, MLS, NHL and many other large media & sports organisations use Imagen to get the most out of their video.

GET IN TOUCH WITH IMAGEN

To discuss your video management, delivery and distribution requirements, please contact us and one of the team will be in touch.

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