

# WILDERNESSES

A man with a beard is shown in profile, looking towards a television screen. The screen displays a soccer game. The background is a blurred stadium filled with spectators. The overall color palette is a gradient from teal on the left to purple on the right.

## The Changing Nature of Sports Fandom

Wilderness Agency | Industry Insights Report



Federer SUI \* 15 5

Denis Istomin UZB 30 5

Challenges Remaining

FEDERER ROGER 3 00

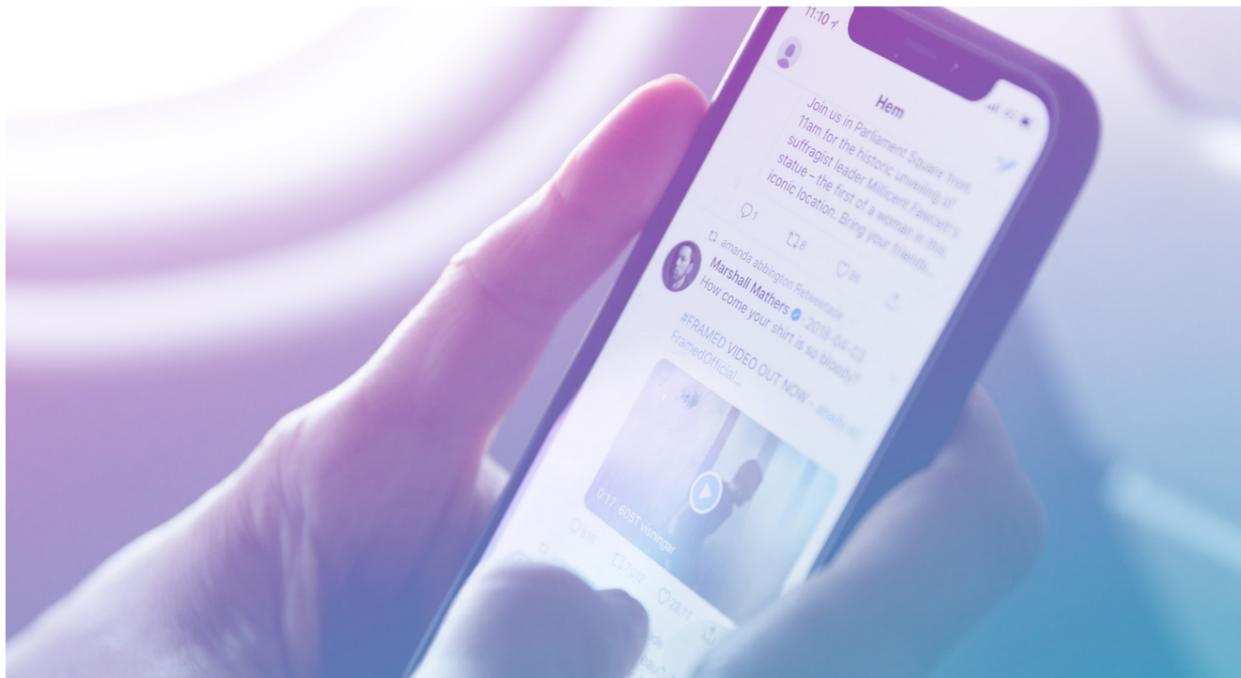
ISTOMIN DENIS 3

## How Gen Zs consume sport online: A Deep Dive

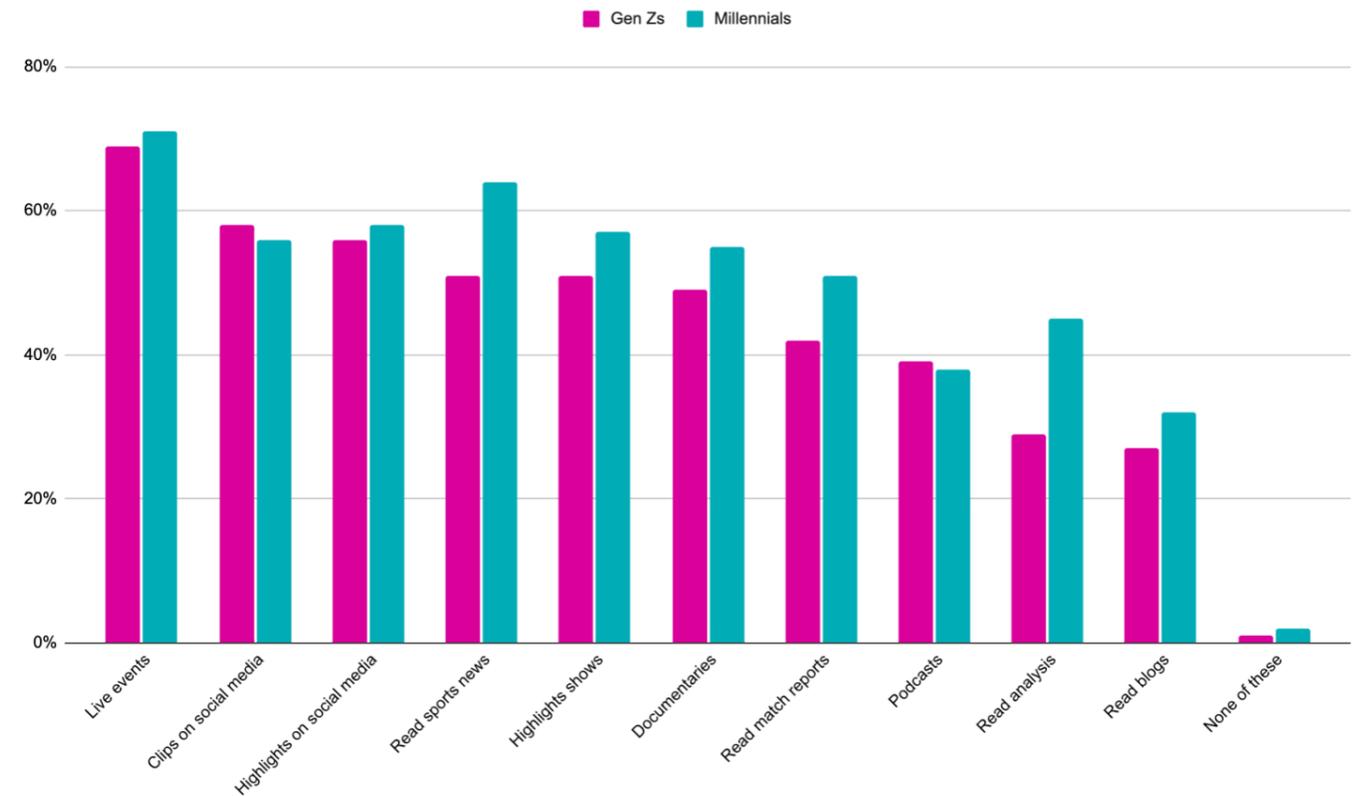
Gen Zs are consuming less sport than their previous generations. Recent research shows that around 40% of them do not watch any sport at all. We dug into the minds of the youth who do love sport in order to find out how they consume and where they think sport needs improvement.

# Gen Zs prefer social media coverage to full games

Our research shows that Gen Z sports fans are reading reports, news and analysis far less than their millennial counterparts and are following sports coverage more so online by catching highlights and clips on social media. When it comes to engaging the new sports fan, it's important to focus on bite-size video content instead of longer form articles and reports as they're not as keen to spend time regularly reading.



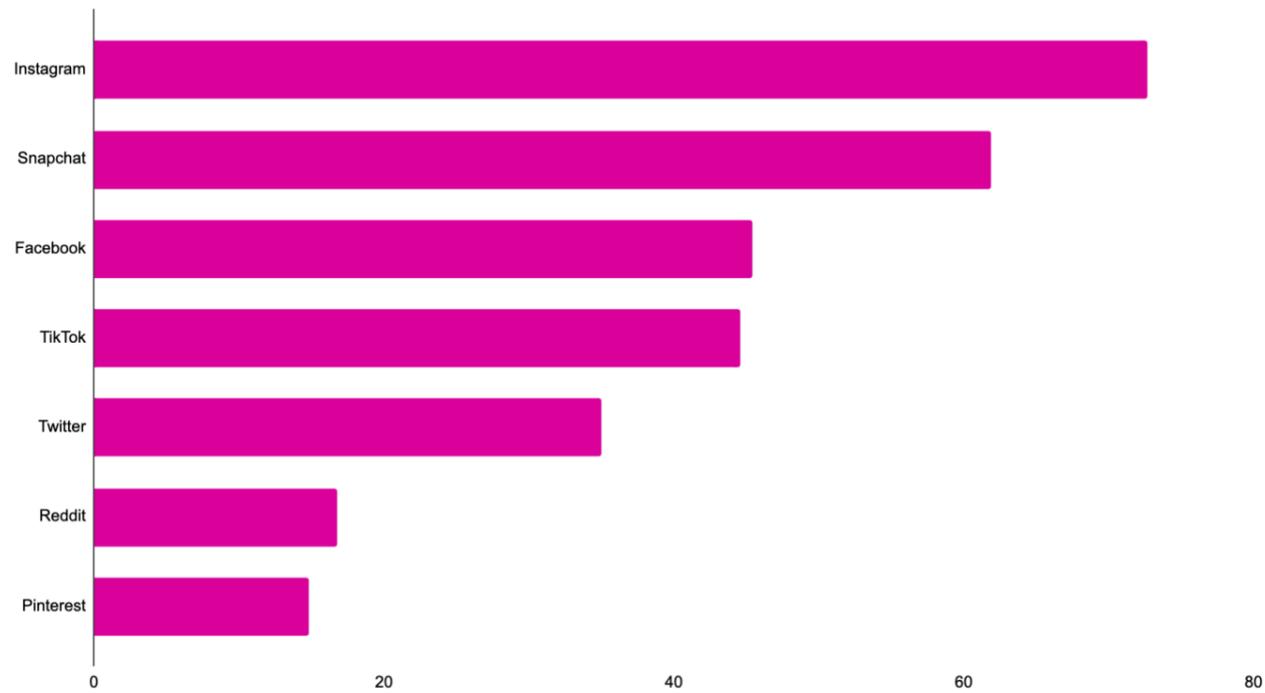
What sports content do they consume?



What is good to note about this generation of sports fans is that they are much more willing to consume snackable content - be that clips or highlights - rather than written content or documentaries. Our recommendation is to add value through a unique tone of voice, and add creativity to short content. It is no surprise therefore that this audience spends so much time on apps such as TikTok and Snapchat that do this so well.

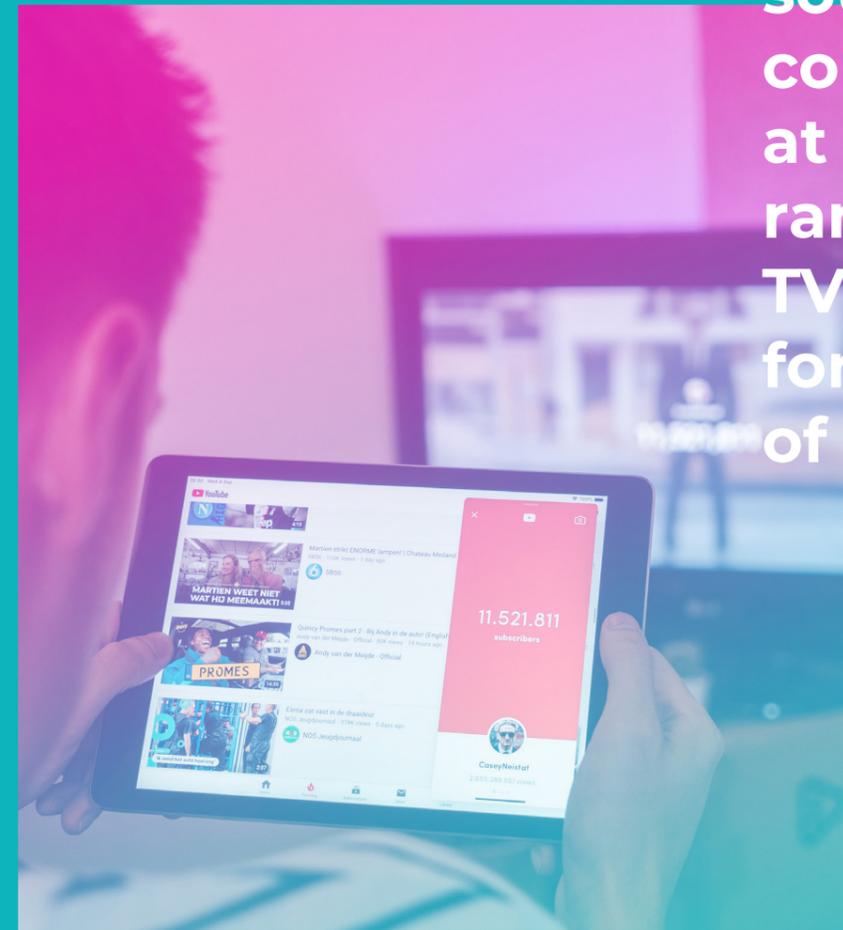
# Where are Gen Z sports fans using social media?

Social Platforms Used Daily



Source: GWI

Gen Z's primary source of sports content is YouTube at 68%. YouTube ranks higher than TV and streaming for this generation of sports fans.

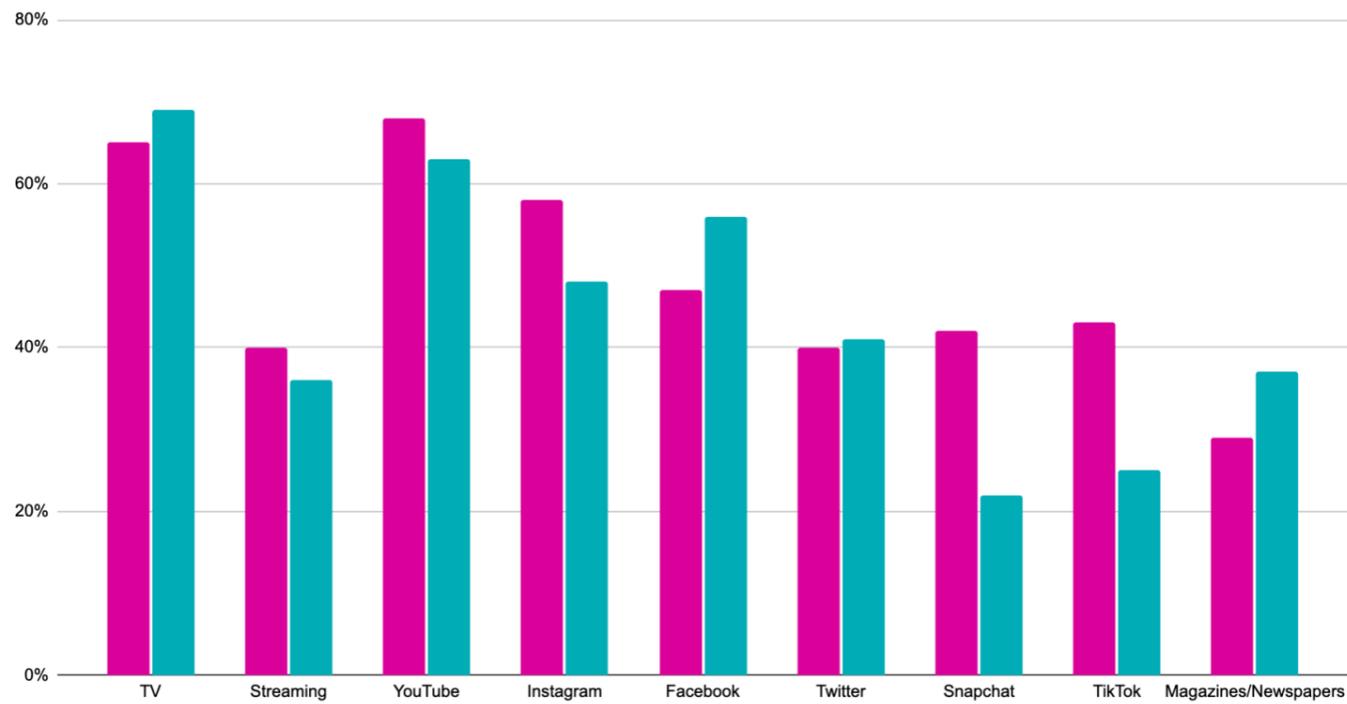


Facebook is increasingly being left behind by these sports fans, with TikTok and Snapchat rising the quickest. In fact, we've seen an 8% increase in reported daily TikTok usage by this demographic between Q4 2020 and Q1 2021. For brands looking to engage this demographic, there are no better platforms than TikTok and Snapchat. Besides this, our research has also shown that 58% of Gen Zs turn to Instagram to follow sports content, making it a consideration as well.

That said, for Gen Zs, YouTube is the main go-to for sports content - more so than TV, streaming and print. For Millennial audiences, TV is still key - and they are also spending more time reading articles - but this isn't the case for younger audiences, who are turning to social media over traditional written coverage in droves. Our research shows that video is winning above all else for this demographic, and finding ways to authentically engage - through highlights and personable analysis - is the way forward.

Sources of sports content

■ Gen Zs ■ Millennials



# Why do they follow sport?

This generation don their colours for a sense of nostalgia: their main reasons for supporting a team are because of family (34%) and because they grew up following it (33%). They do not differ much from their millennial counterparts in this regard. Our research also showed that what they love about sport is the sense of belonging and the entertainment value it brings - but they did have a lot to say about how sport should be improved.

15% of people said **racism and inequality were the number one issues plaguing sport today**, making these the most popular issues for the audience we surveyed. We know Gen Z audiences no longer want brands to sit on the fence, but rather to take a stand when it comes to important issues.



I would prefer my team to have more ethical sponsors that I would want to support, unfortunately that's the sporting sponsorship landscape though and money talks.



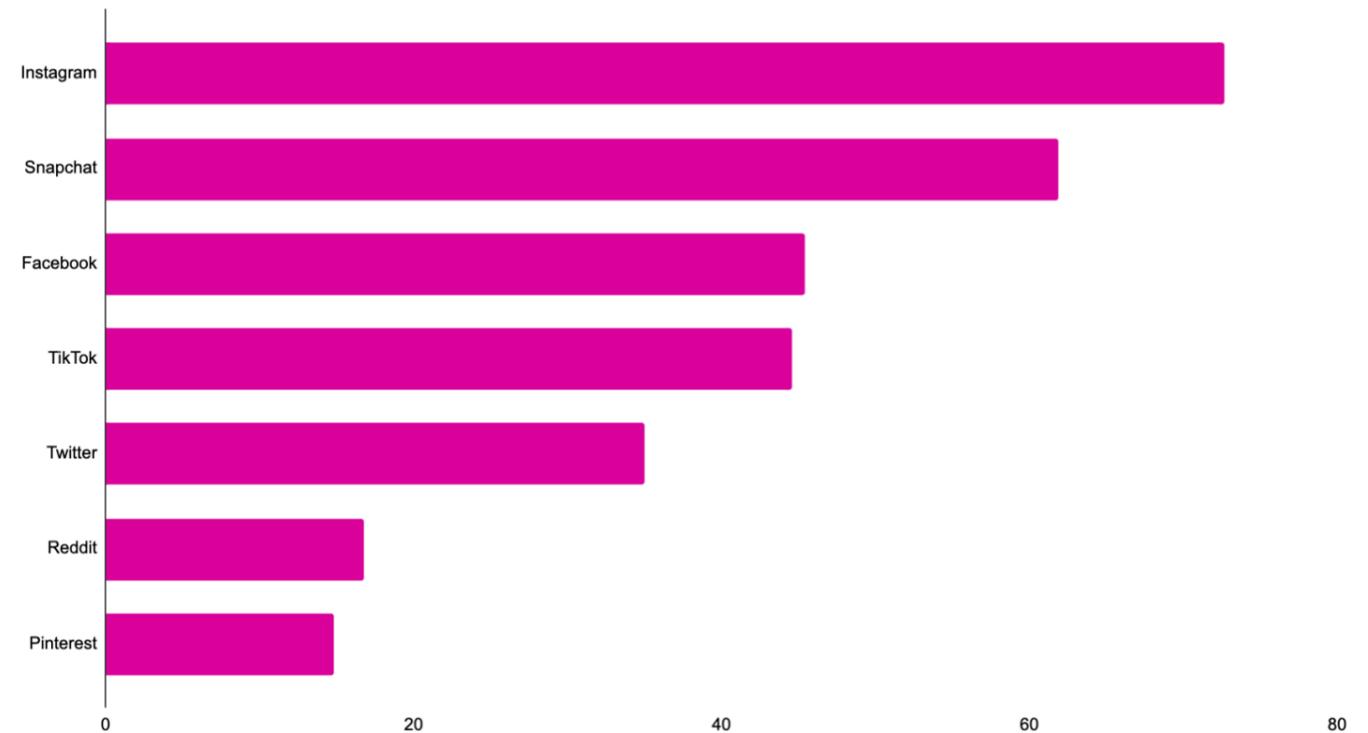
Many young fans also said that they would prefer their teams to choose more ethical sponsorships, with gambling and betting sponsors being cited as a major flaw for some. Furthermore, **86% of Gen Zs said that a brand's values and ethics were important to them when considering making purchases.** Their language showed their hopelessness at teams not listening to what fans want however. Brands have a huge opportunity to take a real stand and go against the majority by listening to young fans and choosing ethical sponsors here - something that is currently not being done, especially by most major sports teams.

# Gen Zs are being priced out of the equation

GEN Z SPORTS FANS ARE MORE LIKELY TO PAY FOR SPORTS VIDEO GAMES THAN TO PAY FOR LIVE SPORTS COVERAGE.



Social Platforms Used Daily



While paying for live coverage of entire games still ranks highly, it is interesting that this generation is more likely to spend their money on sports video games such as FIFA and PES. Print, once again, is getting left behind when it comes to what Gen Zs are spending their money on, with even YouTube Creators ranking higher. A prime learning here is that methods of gamification can be a great way to get this audience to participate in sports content. This is not a passive audience, rather, it is one that expects to be engaged while being entertained and informed.

“““

**I prefer YouTube and social media because of the short and sweet nature. Highlights are much easier to consume than a full sporting event. I very rarely pay to watch sport because the cost of doing so is ridiculous, so I have no option but to catch highlights and follow along on social media.**

# What would you change about sport?

“

I wish sport wasn't run so much like a business with overpriced ticket prices, etc. That spoils it for me.

“

It's much easier to follow a game along on social media because you don't have to pay and you can still be part of the conversation.

“

You have to pay a lot more for games now. I remember growing up and listening to coverage on the radio with my family. Nowadays coverage is so expensive, people my age feel priced out.

“

I wish there was better coverage on free channels. It's far too expensive to pay to watch all the games.

“

Event and league organisers should do more to promote the unique elements of the live stadium experience to make it worthwhile, as well as working on flexible payment options for individuals and families.

# What do Gen Zs look for when it comes to sports brands and coverage?



**I mostly watch games via streaming, through Sky Go for instance, because it's so flexible.**

Our research has shown that what this generation wants is:

**Flexibility** - They want to be able to consume content around their schedule. Several respondents claimed games were “too long” and that they wish they had “more time to watch entire games”. While of course gameplay cannot be changed, this indicates that this is a generation that demands something different: they want bitesize and easy-to-consume content they can consume wherever. Naturally, social media lends itself to this perfectly, as do streaming apps that offer flexibility.

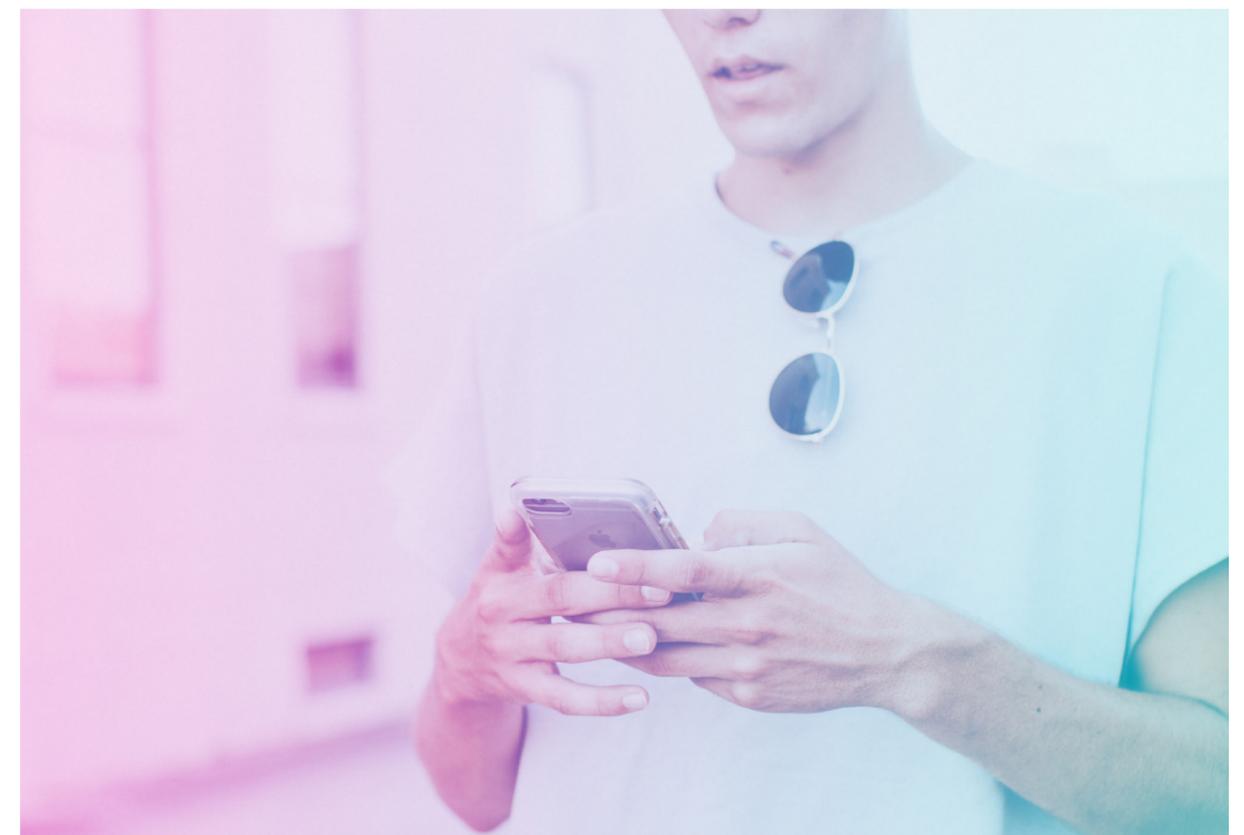
**Affordability** - Another huge barrier to sport consumption is the high cost. Several respondents claimed match tickets were too expensive, as were subscriptions to services where they could watch games. As of last year, it would cost UK fans £3,399 to watch every single Premier League match. With costs rising so much, we know this generation turns to freely available highlights, such as on YouTube.

**Gamification** - Since this generation is far more likely to spend their money on sports games than sports coverage, including elements of gamification into coverage - instead of having a traditional, passive approach, is a worthwhile idea.

**Video** - We're seeing written content increasingly being left behind, and YouTube and social media highlights winning. Video is essential in engaging the new sports fan and needs to feature in brands' strategy.

**Authenticity** - Increasingly, Gen Zs expect brands they support

to take a stand for causes they care about. Respondents replied with racism, inequality and environmental impact being key issues they believed need attention in sport. They want brands - and sports teams they support - to take a stand and be authentic in their actions.



# What's next?

A poll from Morning Consult shows that only 53% of Gen Zs identify as sports fans, compared to 69% of millennials. We know younger generations do not seem to be as passionate about sports, but it's much more important to understand that Gen Z sports fans are very different to their predecessors. When they are not being served content that works for them, they are not afraid to step away. While the millennials we've spoken to have also complained about high ticket and coverage prices, they still paid for it. What makes Gen Z unique is that they take a stand, and are turning away from tradition. Many of them have stopped paying for coverage, and are instead finding new ways to consume sport - through YouTube and social media.

The brands who will win in this space are those who go against the grain and make

sport accessible, in a shorter format. We're seeing YouTube dominating this space, and it will continue to do so because of the flexibility it allows users - they can consume content on the go and it is free. Our prediction is that TikTok, with its snackable and authentic video format, is increasingly going to feature heavily in this space. It also allows for creativity and participation, which is crucial for an audience that is no longer passive. Brands in the sports sector who aren't jumping on this platform right now risk losing out on this generation and being left behind.



# We are team Wilderness.

We are a young, talented and slightly obsessed pack of social strategists, content creators and media experts.

**Strategy** fueled by insight. We build, curate, and grow online communities that deliver impact.

**Creativity** that grabs attention, makes you stop, think, engage and interact,

**Paid media** focussed on human-centric advertising to reach people not consumers. We engage, activate and convert global audiences.

Like the  
sound of us?

Get in touch.

[hello@wilderness.agency](mailto:hello@wilderness.agency)