



# **EXCLUSIVE REPORT SWITCHED ON SUPERFANS**

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

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# INTRODUCTION

## THE NEW GENERATION AREN'T PLAYING BY THE OLD RULES

**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 the game, with the most dedicated fans indulging their passion to a whole new level thanks to the diverse range of video content available, and their ability to interact with it.

Millennials and Gen Z aren't watching less sports content, but their preferences, and the ways they engage with that content differ significantly from prior generations.

Whilst the live experience is by no means dead, the emphasis younger generations place on the content which surrounds it should dictate how clubs develop content strategies, and utilize technology to help them stand out from the crowd, to turn followers into lifelong superfans.



**RYAN ROLF**  
CRO AMERICAS, IMAGEN



"Sports fans, particularly Millennials and Gen Z, are craving a more personalized experience when engaging with their favorite sports. They are taking matters into their own hands when it comes to content creation and it's up to the leagues, teams and players to keep up with this content consumption shift.

Using the right video management and delivery platform provides sports organizations with the opportunity to push out authentic and relevant content to meet fans' expectations."



# 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 to 73 years old

1965-80  
**X**

**GenX**  
39 to 54 years old

1981-96  
**M**

**Millennials**  
23 to 38 years old

1997-ONWARDS  
**Z**

**GenZ**  
18 to 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

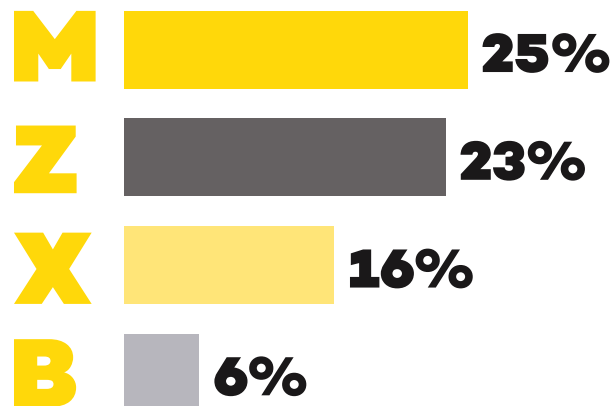
## LEAGUE AND GENERATIONAL DIFFERENCES

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



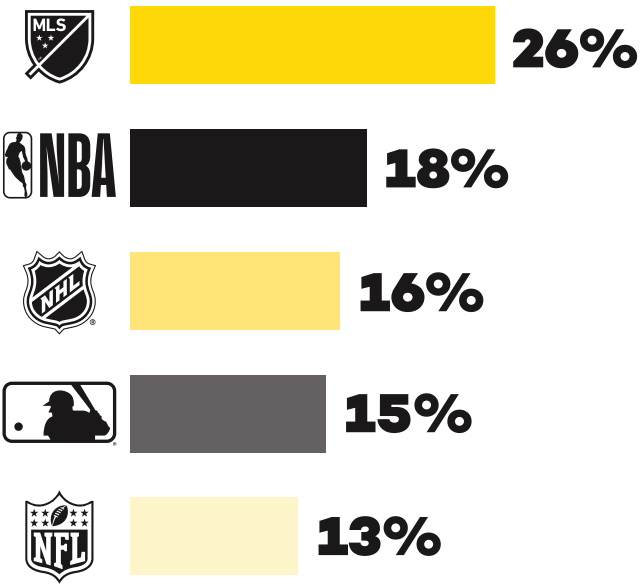
# CONSUMPTION

## LEAGUE AND GENERATIONAL 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.

### CONSUMPTION OF NON-GAME VIDEO CONTENT BY LEAGUE

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

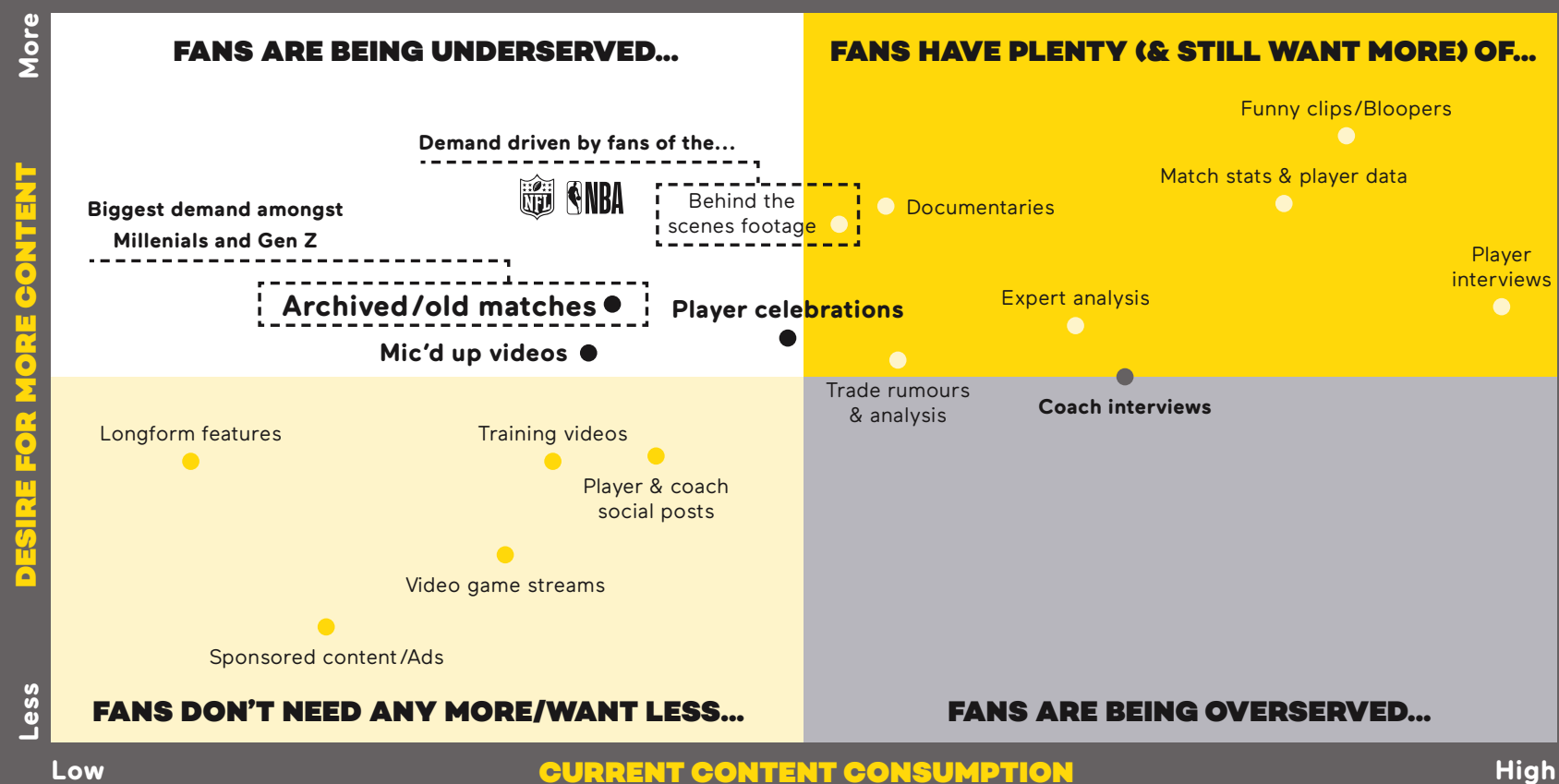


# SUPPLY & DEMAND

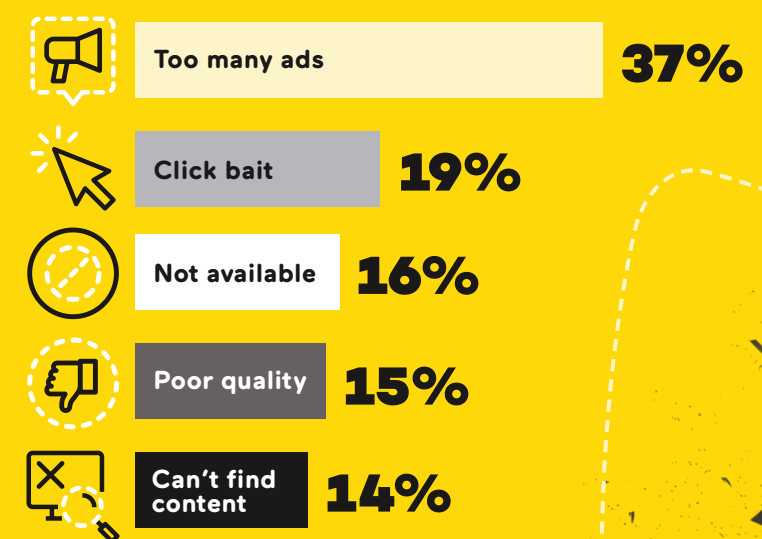
## OPPORTUNITIES FOR CONTENT EXPANSION

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.







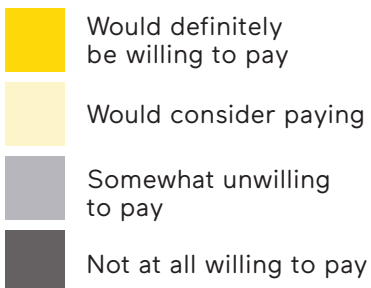


# MONETIZATION MODELS

## AVOD VS SVOD

Across all generations the majority of fans would prefer not to pay for exclusive content, however millennials fans show the greatest willingness to do so, with Gen X and Boomers more tied to their cable subscriptions, and Gen Zs lacking sufficient disposable income.

### WILLINGNESS TO PAY FOR EXCLUSIVE CONTENT



**NET: WILLING TO PAY 31%**

**39% OF WHICH WERE M**

**FANS WOULD BE WILLING TO PAY**

**\$15 PER MONTH FOR EXCLUSIVE CONTENT**

**\$10 PER MONTH FOR AD FREE CONTENT**



# 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.

Currently the majority of content is not directly built for interactivity. To better capitalize on fans' potential to act as brand ambassadors this will need to change.

### 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 





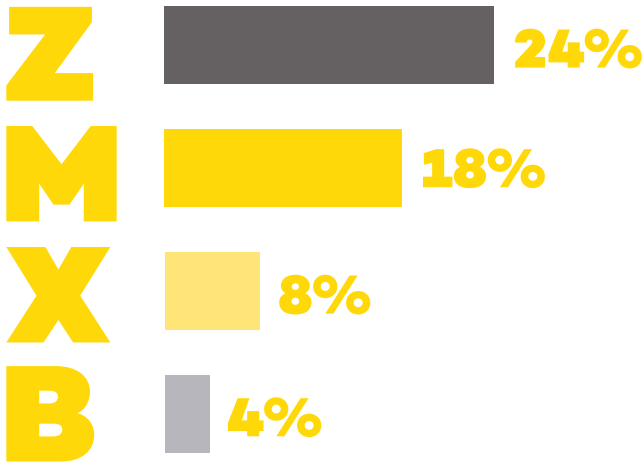
# INFLUENCER IMPACT

## MAKING THE RIGHT IMPRESSION








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

Whilst they have embraced product endorsements for decades, athletes are now increasingly operating as social media influencers, making use of their direct line of communication to admiring fans and followers. This trend is likely to continue as Gen Z’s purchasing power increases.

### % 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.

## 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 catalogues for efficient search, and allow fans to curate their experience via playlists, recommendations, and user groups
- 4 Embrace fans' content submissions to contribute their own material. Set-up simple portals to allow for easy submission, and promoting 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

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.





# TAKE YOUR SPORT TO THE NEXT LEVEL WITH IMAGEN

Imagen is an intuitive video management platform that enables sports organisations, media companies and enterprises to intelligently manage their video media with enhanced functionality, control and insight.

## 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 TO ARCHIVE** Live stream, archive, or clip and publish incoming streams in real-time.



**CONTENT MONETIZATION** Generate revenue with B2B licensing and B2C subscription services.



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





# WIN HEARTS, MINDS AND MARKETS WITH IMAGEN.

## WE ARE IMAGEN.

Drive engagement, generate revenue and transform your business with the world's smartest video management platform.

## NEW YORK

106 West 32nd Street, 2nd Floor  
Office #135, New York, NY

✉ helloUS@imagen.io

☎ +1 (857) 574 9847

## LONDON

16 Kirby St, Second Floor  
London, EC1N 8TS

✉ hello@imagen.io

☎ +44 (0)1954 262000

## CAMBRIDGE

1 Grange Court, Covent Garden,  
Willingham, CB24 5AH

✉ hello@imagen.io

☎ +44 (0)1954 262000

**WWW.IMAGEN.IO**