



The Sports Fan

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To Be Human Is To Be A Fan

As long as people have been doing things, there have been fans. It's easy to imagine an early human watching another take down a mastodon with unrivaled ease and a fan being born that moment. As long as people have been telling stories, there have been fans. Aristotle and Plato had devoted followers; Buddha, Jesus and Mohammed all had their followers; religion is an essential form of fandom. In other words, fandom is elemental to the human experience. Fandom is a measure of cultural engagement, and cultural engagement is good for societies. It means that people are paying attention, expressing their values, and voting with their attention (and money) on the things that are meaningful to them.

Fandom serves three main purposes: (1) It helps people define themselves both internally and externally. (2) It helps people connect with others. (3) It gives people something that brings them joy in an increasingly anxious world.

This report is the first in a series.

Marketing is largely an exercise in finding the intersection between brands and fans. As such, understanding fandom and how it is changing is vitally important to our business and our clients' business. In 2023, we will explore various types of fandom in four reports: Sports, Music, Brands, and Influencers. Surely there will be common elements and trends across these various types of fandom, but we believe there are enough differences that warrant specific explorations. The four reports will be published quarterly in the order listed above.

Methodology

This report is underpinned by primary research conducted by Starcom in January of 2023, in which we surveyed ~1200 Americans about their attitudes and behaviors regarding sports fandom. It also incorporates learnings from the following sources:

Sports In Transition report: Publicis Sports and Entertainment, 2022

Next Generation Fandom Report: Emory University Marketing Analytics Center, 2022

Pluralistic, TikToks enshittification: Cory Doctorow 2023

Almost nobody Cares what's in the Top 10 any more: David Gerard 2023

Fandom Is Changing

It's no longer enough to simply watch a show, go to a concert, or read a book. Being a fan today means a whole lot more—more access, more content and more engagement.

All Access All the Time

To be a fan today is to immerse yourself in a million different ways.

The emergence of social media and smartphones means that if you are a fan of someone or some organization, you can now get more intimate, get more information, get more interconnected fellow fans than ever before. Whether you're a fan of K-Pop group BTS or the New York Yankees, you have an almost limitless array of platforms and channels that can feed your fandom. You can watch concerts on YouTube and full games on Amazon, but let's say your fandom is a bit more nuanced. Let's say you love cooking and Top Chef, but specifically, you're a fan of host Tom Colicchio: Not only can you watch and rewatch every single episode of Top Chef on Peacock, but you can also join the celebrity chef on Twitter and Discord as he mints pizza-themed NFTs.

Even things that seem monolithic can have infinite nuance in the value they deliver to their fans. Activision's iconic video game *Modern Warfare 2* (MW2), sold eight million copies of the game within three days of its November 2022 launch. What is fascinating about this game is that instead of delivering the same experience for every player, MW2 manages to deliver something for everyone. Fans of fast-paced action might only play the Shipment or Shoothouse maps, while fans of strategy and stealth might only ever play the Battle Royale part of the game.

Over the past decade, entertainment and media businesses have focused most of their energy on designing human attention traps that they can monetize by selling to advertisers. The effect of this is an infinite stream of somewhat personalized content that shapes and enables fandoms around literally anything. You can be a fan of a sandwich, a pop singer before anyone else discovers them, or an obscure anime and connect with someone on the other side of the globe over that fandom.

On the demand side of fandom, it is a great time to be alive. You can assert your individuality, connect with other fans, and distract yourself from life's unpleasantness. And you can do all this in ways that align with your interests instead of having a few choices dictated to you. The downside of this fandom fragmentation is felt most by the business and people who monetize fandom.

Today's fandom lets you truly go down the rabbit hole, encouraging fringe expressions of mainstream interests and mainstream expressions of fringe ones.

The Attention Deficit

A million ways to engage in and express your fandom also means being a fan of a million different things.

In October of 2022, Apple Music announced that it had hit the 100 million mark for the first time. Not 100 million streams, but 100 million distinct songs on the platform. Amazon Music quickly followed suit. The impact of this diversity can be seen in what music Americans are listening to. The Top 10 pop hits in the US in 2022 account for half of one percent of all music listening in the U.S. This doesn't mean that there are fewer music fans; there were 1.1 trillion streams of music in 2022—an increase of 12% over 2021. It's just that people aren't listening to the same stuff. Everything is long tail, with consumers getting more and more niche. Having a #1 hit with less than 10,000 streams is now possible. Forty years ago, that would have landed you squarely on the Indie charts. This explosion of music availability happened at the same time the podcast industry was growing from its nascency to over 70 million different podcast episodes available on Spotify and Apple Music.

Sure, there are still monoliths when it comes to fandom. Celebrities like The Rock, Jennifer Aniston and Dolly Parton have enduring fans of all ages, all political ideologies, and all genders. But in the effort to win over and captivate every moment of human attention, we have created a culture that serves up fan-worthy people, organizations, and things with unprecedented velocity.

One of the clearest demonstrations of this cultural fragmentation can be seen in the ratings for live sports. In the mid-1990s, the NBA Finals regularly drew 25 to 30 million TV viewers per game. We saw about 10 million viewers per game in the late teens and early twenties. Given that the population has grown by about 25 million people in that time span, on a rate basis, the NBA Finals have seen a significant decline in fandom. This fragmentation isn't, of course, limited to sports. The Oscars has seen its audience decline by about 75% from its peak in 1998 to now. Disney—which is essentially a company that sells access to fandom across its theatrical, theme park, and sports properties (e.g., ESPN)—has aggressively moved into streaming, but as of early 2023, has lost upwards of a billion dollars while chasing fans across new touchpoints.

Proliferating channels makes it difficult for us to focus on anything, individually or collectively.

70%

reduction in number of viewers of primetime television in the last 30 years

2x

increase in the number of social media accounts an individual has over the last five years alone

Mass Reach in a Micro World

You CAN still please everyone all of the time.

In 2020 and 2021, during the depths of the Covid-19 pandemic, the average American had more than 30 minutes of extra “free time” each day. And given the fact that people were largely cooped up inside and separated from lots of group interactions, they filled their extra time with content. Streaming services, podcasters, TikTokers and fandom sellers quickly filled the void. As people return to their commutes, offices, restaurants, and parties, we will likely face a glut of content and a relative dearth of attention. The type of content they consume might change as well. For example, some hypothesize folks are more likely to listen to music on their commutes than podcasts. As people return to normal habits and activities, it will be interesting to see if this plays out and if the podcast industry starts to soften in a big way.

The lesson in all of this for people who directly sell fandom (e.g., platforms, entertainment companies and sports leagues) and people who indirectly try to intersect with fandom, is that it is very important to understand the true nature of fandom. Are people fans of Tom Cruise, or are they fans of films about airplanes? Are they fans of films about airplanes, or are they fans of their own youth and nostalgia? We will see later in this report that oftentimes, there are many layers to people’s fandom, and our assumptions about what drives that fandom have to be constantly interrogated.

It's still possible to capture our collective imaginations by finding the shared emotions we chase that underly our fragmented interests.



What This Means for Sports

We surveyed ~1200 Americans age 15+ and asked them about their fandom, how it is changing, and what might help them become bigger fans. Here's what we found.

Not A Free Market

Athletes and fans are constrained by the number of avenues they have to engage and the barriers to initial entry.

As we have laid out, fandom is undergoing profound changes. Media fragmentation is largely responsible for unleashing a torrent of new stars, songs, films and forms of content. Going into this research, we hypothesized that sports fandom might be uniquely disruption-proof. Yes: Fans can now follow their favorite teams and players on social media. They can collect NFTs from stars like Odell Beckham Jr., go on Reddit or Twitter and ask their favorite players questions, and shop the looks of their favorite athletes on Instagram or HighSnobiety. In that sense, sports fans participate in the same social media behaviors that fans of musicians, actors, and influencers can partake in. Yes: Games that used to be on linear television are now on streaming platforms. Yes: Fans can choose not to watch games at all and instead follow along digitally through products like Gamecast, game threads on SB Nation or Twitter, and instantly available highlights. However, the core product of sports are the games themselves, and the barrier to replication is enormously high. It's one thing to be a singer-songwriter with a YouTube channel. If you have a good enough persona and good enough songs, you can rival Taylor Swift for streams overnight. But if you're an athlete, you rely on a tiny number of other professional athletes as foils to show off your talents. The number of leagues, teams, and players is capped by the expense of owning a team, rules about how many teams are allowed and minimum and maximum roster sizes. The number of athletes one can be a fan of will not grow exponentially like the number of podcasts did over the past few years.

Furthermore, professional and collegiate sports in the United States are primarily gatekept by leagues (e.g., NFL, MLB) and platforms (e.g., FOX, Disney, Amazon, YouTube). The leagues sell broadcast or streaming rights to the platforms, and the platforms sell fans to advertisers. Given the nature of this relationship, we anticipate change is inevitable, but slower to come to sports than in other arenas.

The finite number of leagues, games, and athletes has kept sports fandom relatively undisrupted, but change is still coming.

A few key numbers.

50%

Of our total sample, 50% of respondents identified as sports fans. This is consistent with other studies we have seen and is relatively consistent over time.*

65/35

Our study found that sports fans skewed strongly male (65%) but agreed with other studies that routinely report that people identifying as female make up 35% of sports fans.

* One notable exception is the Next Generation Fandom report conducted by Emory University, in which self-reported fandom dropped 51% to 38% from 2021 to 2022. This could be due to methodology changes as there are no systemic factors that we can identify that would rationalize such a profound decline.

Legacy Prevails...For Now

The Big 3 are still the Big 3, but younger fans are demanding different kinds of engagement.

The most popular leagues among our sports fans were overwhelmingly the NFL (65%), NBA (50%), and MLB (46%). NCAA Football, NCAA Basketball, European Soccer, MLS, and Boxing formed the next tranche of favorites coming in between 22% and 16%.

It's worth noting that the biggest sports, according to fans, are ones with a legacy of broadcast. It's no wonder that upstart golf league LIV Golf (which needs reach and credibility more than money) just inked an ad-share deal with the CW. First, being on TV will provide familiarity and credibility for the controversial league, and having a TV deal will help put LIV on equal footing with the PGA tour. Finally, LIV knows its demographic audience and knows they are more comfortable in a linear environment. This explains why the rights went to a linear TV network instead of a pure-play streamer. Older sports fans often complain that leagues are making games "too hard to find," which is code for "I don't know how to watch TV on Amazon!!" So LIV did the logical thing. Golf

fans are getting older and not being replaced by younger fans. CW has its own issues as far as reach goes, so it will be interesting to follow and see if LIV can attract new fans to the game and the league by leveraging players who are already well-known entities. This will help define whether golf fans are fans of individual players or of the ecosystem itself.

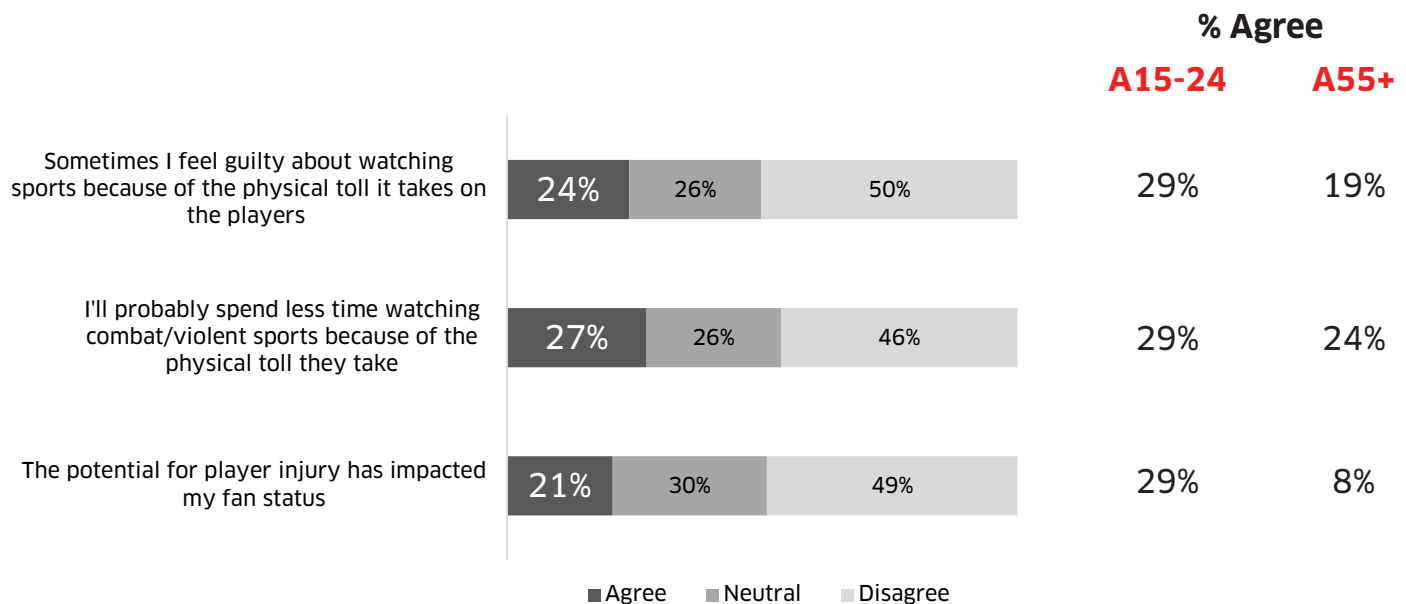
Growing newcomers like F1 and esports are still nascent, with 9% and 8% viewership, respectively, but they are nearly twice as popular with people under 35. These younger sports understand that their Gen Z and younger Millennial fans are deprioritizing watching entire games, instead looking to augment (or sometimes even replace) the game experience with a host of auxiliary content. Why sit for a three-hour battle when you can stream highlights on YouTube, see breakdowns on Twitch, or catch behind-the-scenes drama on Netflix? While all this adjacent content might be inaccessible to older viewers, the future success of the Big 3 might hinge on it.

Modernizing sports means embracing the possibilities of the cord-cutting future without ditching traditional, older fans.

Dealing with Dissonance

Ethical considerations are complicating sports fandom for many.

As we embarked upon this investigation into the changing landscape of fandom, two recent incidents from the NFL forced us to wonder if serious injuries to players are putting off fans of violent or combat sports. For years fans have been aware of the cumulative danger that concussions present. In the 2022 NFL season, Miami Dolphins quarterback Tua Tagovailoa suffered multiple scary concussions on the field. Then in early January, Buffalo Bills safety Damar Hamlin went into cardiac arrest on the field after a one-in-a-million hit to the chest incapacitated him. We asked our panel if the potential negative impacts on players would impact their fandom:



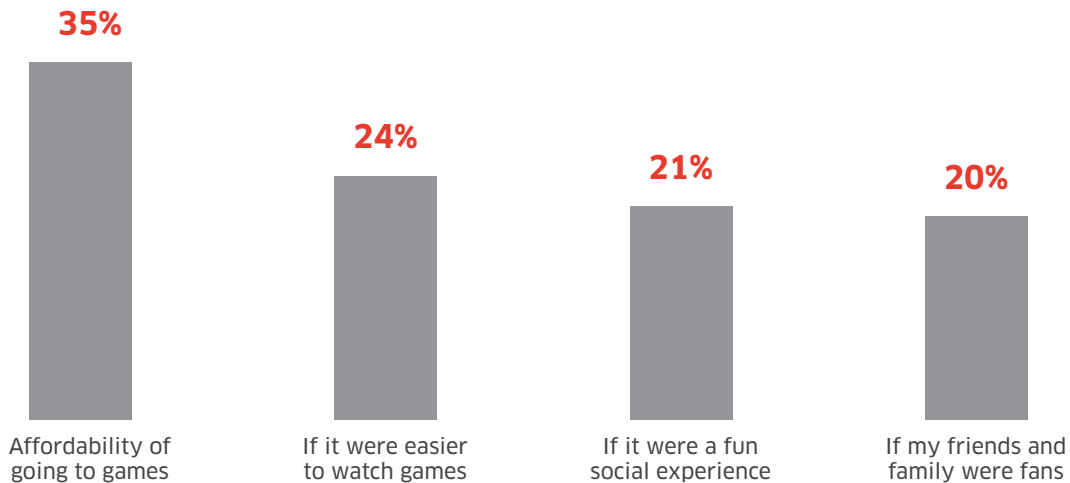
The majority of respondents said they didn't feel guilty and didn't anticipate the risks to athletes impacting their fan status. Younger fans were more likely to cite experiencing guilt, but the vast majority were able to move past this discomfort. We conclude that high-profile traumas suffered by players won't break the fandom mindset abruptly but, over time, could keep younger fans from coming to the league. The other unexpected phenomenon we noticed was that 40% of sports fans say that injuries to their favorite players are a drag on their fandom, not because of the human impact but because of the competitive impact. When your favorite players get hurt, a) you don't get to watch them play, and b) your team probably doesn't fare as well on the field. Injury prevention should be top of mind as injuries negatively impact the quality of the product on the field.

Concerns of safety are surmountable if the fan experience is engaging enough.

Modernizing Without Alienating

A fan experience that is multifaceted and active rather than passive, can break down other barriers.

So what *does* the fan of the future want? When we asked our panel what would make them more enthusiastic sports fans, the top four answers were:



These responses highlight the tension between renovating the fan experience to make it more modern, and the trade-off created with the traditional sports experience fans have come to expect. As the vast majority of Americans get comfortable streaming content and cutting the cord, we must move beyond the decades-old behavior of fans tuning the TV to the game. In the process, however, this might alienate older fans, who tend to be the most loyal and valuable fans at present. The marketing mix for leagues and league partners must incorporate ways to help fans effortlessly navigate how to watch their favorite team.

For younger fans, making fandom a shared social experience and providing rewards for recruiting friends and family should be strongly considered. Sports fandom has significant network effects that should be rewarded and encouraged.

There are other ways to increase active participation as well. Gambling on sports in various forms is now legal in 30 states. This becomes a very interesting lever to bring new fans into sports and strengthen existing fans' relationships with sports. After all, if you have some skin in the game, you're much more likely to reward the sport with your attention. Thus far, sports betting is growing, even though 73% of respondents in our survey said they did not participate in sports betting at all. But the sports fans who do bet are very open to hybrid linear/digital experiences that allow them to bet, review data and watch games all in the same interface. Whoever gets to market with a seamless and robust sports betting application stands to be a big winner.

Improving fan access to their favorite sports is important across the board, but what access looks like is highly dependent on age.

What This Means for Marketers

At first blush, it might appear sports are losing their mass resonance among younger Americans. But as fandoms grow diffuse for sports, just like elsewhere, we're seeing more opportunity for marketers, not less.

Fans Are Still Legion

Modernization of sports will give marketers access to fans, helping them better access the players and teams they love.

Whether you stream influencers playing League of Legends, watch Lionel Messi highlights on loop or catch full Raiders games on TV, you're chasing the same highs: A rush of adrenaline and the community that comes along with it. Sports still capture our hearts and unite us, even if we're not watching the same exact sports in the same exact ways. And while new channels to enjoy sports are popping up every day, there will always be realistic limitations to the number of athletes, teams, and leagues. That is, in fact, part of the appeal of sports. Even for those who just catch highlights, each game matters more because there are only so many in a season. This level of control that leagues and teams have over the sports themselves and the ecosystem of content they generate will keep sports marketing relatively stable. Indeed, investing in sports partnerships and placements still remains a great bet. The key will be to stay close to leagues as they evolve to better capture younger audiences, and to see younger-skewing leagues and fan channels as opportunities for bold innovation. To that end, marketers should still leverage both traditional and emerging sports. It is Starcom's strong recommendation that brands that align themselves with sports follow some key principles:

1. Amplify the social and community-building aspects of fandom.

Brands should help fans celebrate, find, and join communities and cultures that emerge around sports. For instance, brands that incentivize fans to recruit others into the experience stand to win. Brands that leverage the network effects of groups of fans will also harness the power of fandom.

2. Marketers should work with leagues and platforms to innovate the fan experience.

Sports can be slow to innovate, but they are constantly tweaking the game and engagement rules. Brands can and should leverage the heft of their investment to contribute to this innovation. The question to be asked at the brand marketer level is, "How can we help fans enjoy their fandom more powerfully and memorably?"

3. Marketers should dedicate a portion of their budgets to emerging fandoms.

Not every investment will hit, but marketers who invest and experiment early will be best positioned to understand fandoms as they emerge and evolve. Esports is massive, for example, but exceedingly diffuse. That is an investment area that will pay dividends for brands with the vision and patience to contribute to the evolution of the fandom.

Key Findings

For All Fans

More options means more ways to be a fan.

Too many options, however, is splintering fandom.

Unity lies in finding the underlying sentiments driving fandoms.

For Sports Fans

Sports inherently offer only a finite number of ways to engage.

Modern sports will embrace cord-cutting variety rather than reinforcing existing barriers to entry.

An engaging, multifaceted product can overcome ethical and logistical concerns.

Future success relies on understanding the kind of access sports fans want.

As fandoms grow more niche, new opportunities to connect with fringe audiences emerge, but the nature of sports makes reach at scale still possible.