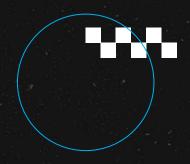
# THE EVOLUTION OF FANDOM

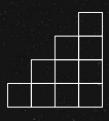
HOW 30 YEARS OF INSIGHTS HELP ESPN ENGAGE MULTIPLE GENERATIONS OF FANS







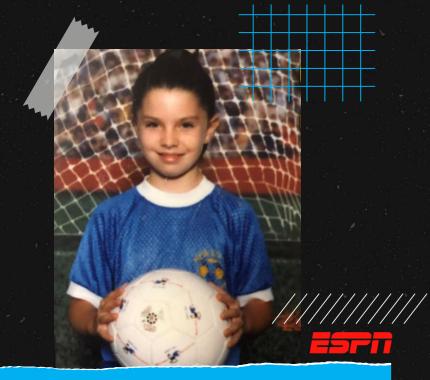






## **CHAD MENEFEE**

**EVP, Strategic Intelligence, SSRS/Sports Poll** 

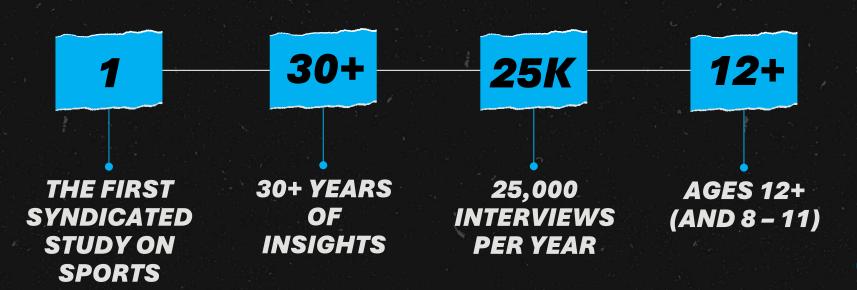


## **KAITLYN CONNOLLY**

**Manager, ESPN Research** 

## FOCUS ON BUILDING LIFETIME VALUE

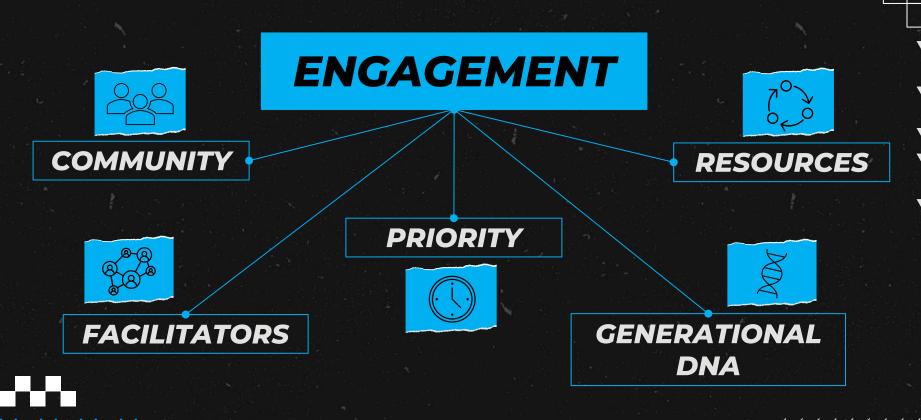
# sports poll 30 years of intelligence





OF AVID SPORTS FANS BECAME FANS BY AGE 10

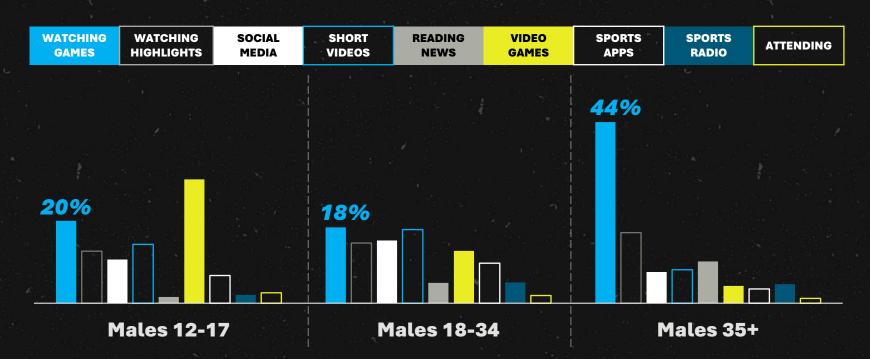
## THE SPORTS POLL FAN DYNAMICS





### YOUNG FANS ENGAGE IN MORE WAYS TODAY

WHAT SPORTS ACTIVITY DID YOU DO MOST IN THE PAST WEEK?



# **NEW METHODS FOR EXPRESSING FANDOM**







**Read Articles** 



**Watch Videos/ Highlights** 













**Events** 









**Play Fantasy** 





**Gaming** (Watching)

Memorabilia



**Athletic Equipment** 



**Attend Games** 



**Athletic Apparel** 



**Engage on Social** (Following players, memes, sharing UGC)



**Gaming** (Playing)



**Sports NFTs** 



**VR Sports Experiences** 



**Sports Travel** 



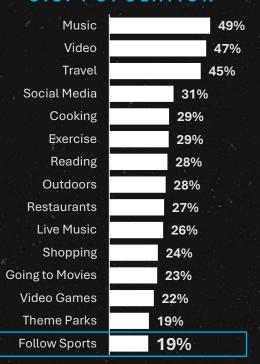


# MORE COMPETITION THAN EVER BEFORE... TOP INTERESTS (% VERY INTERESTED)

sports poll
30 years of intelligence

(JAN 2024-DEC 2024)

#### U.S. POPULATION



MALES 12-17	MALES 18-34	MALES 35+
VIDEO GAMES VIDEO VIDEO VIDEO SOCIAL MEDIA	VIDEO GAMES VIDEO VIDEO VIDEO EXERCISE	OUTDOORS  MUSIC  VIDEO  VIDEO  TRAVEL  EXERCISE
FEMALES 12-17	FEMALES 18-34	FEMALES 35+
FEMALES 12-17  MUSIC  VIDEO  VIDEO	FEMALES 18-34	FEMALES 35+

# **CREATE CONTENT WHERE SPORTS** INTERACTS WITH OTHER TOP PASSIONS

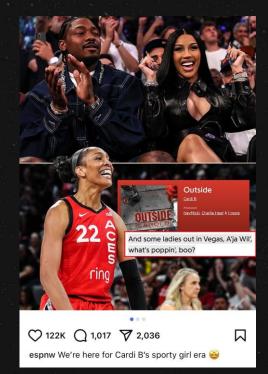
INTERSECTIONALITY = SPORTS +













their inner Iga Swiatek and gave her postgame meal a



### SOCIAL ENGAGEMENT DRIVES ENJOYMENT OF SPORTS

### WHICH IS MOST IMPORTANT TO FANS' ENJOYMENT OF SPORTS?

WATCHING WITH FAMILY OR FRIENDS	45%
FOLLOWING YOUR FAVORITE TEAM	24%
PLAYING SPORTS	9%
ATTENDING LIVE GAMES	6%
FOLLOWING YOUR FAVORITE PLAYERS	5%
PLAYING SPORTS VIDEO GAMES	4%
BETTING ON SPORTS	2%

### **FACILITATORS BRING FAMILY & FRIENDS TOGETHER**

21%

OF THE
POPULATION
ARE
"FACILITATORS"

RESPONSIBLE FOR 6X AS MANY TICKETS PURCHASED AS SPORTS FANS OVERALL

90%+ SAY WATCHING
WITH FAMILY AND FRIENDS
IS IMPORTANT

1.5X MORE LIKELY TO PLAY FANTASY



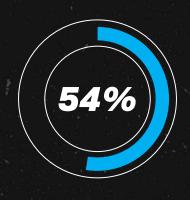
# FANTASY ENABLES COMMUNITY FOR SOCIALLY DRIVEN FANS



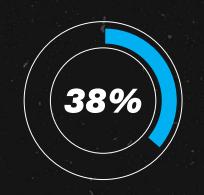


### ACCESS IS THE BIGGEST ROADBLOCK TO ENGAGEMENT

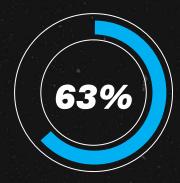
DO YOU HAVE ACCESS TO ALL OR MOST OF THE SPORTS
YOU WANT TO WATCH?



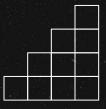
**US POPULATION** 

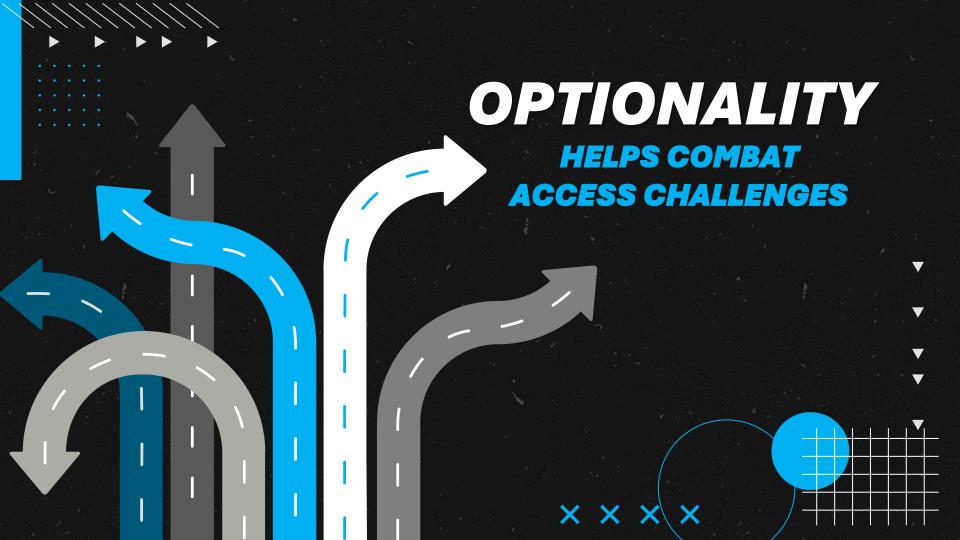


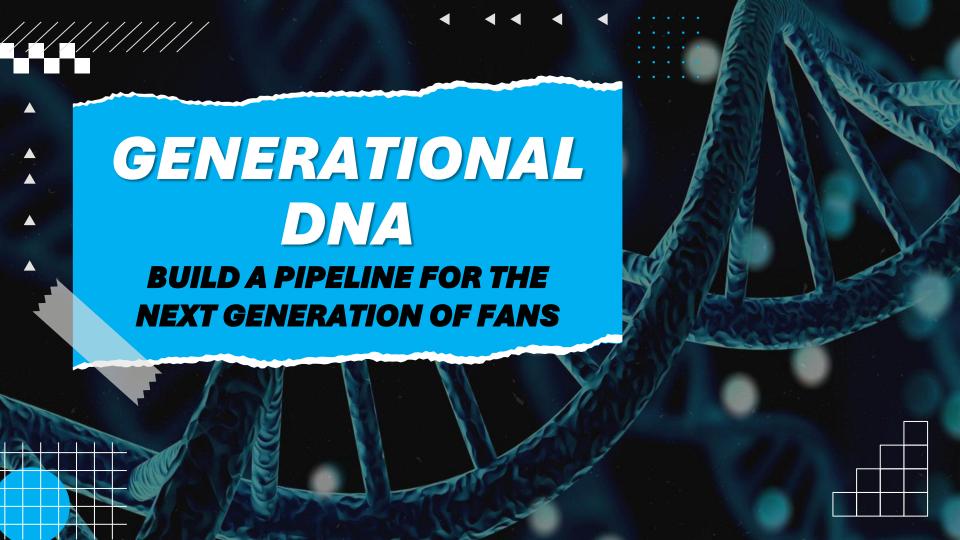
NO CABLE/SAT SUBSCRIPTION



CABLE/ SAT SUBS







### THE "AVID" PIPELINE













sports poll (JAN 2024-DEC 2024)

## THE "AVID" PIPELINE





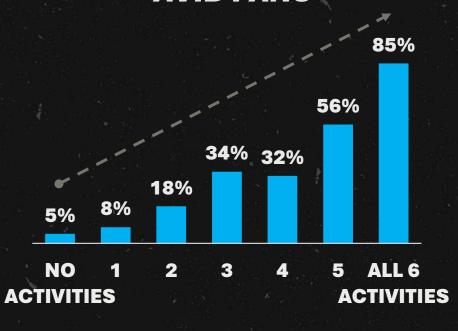








### KIDS (8-11) WHO ARE AVID FANS



sports poll (JAN 2024-DEC 2024)

# LEANING ON RELATABILITY, CREATIVITY & EDUCATION HELPS CONNECT WITH YOUNGER AUDIENCES

### RELATABILITY

- FAMILIAR CHARACTERS
- COMFORT IN THE FORMAT

WHEN MY MOM FIRST TURNED ON THE SHOW, IT LOOKED LIKE I WAS WATCHING A CARTOON OR OTHER PEOPLE PLAYING A HOCKEY VIDEO GAME.

### CREATIVITY

 STEPPING OUTSIDE THE TRADITIONAL SPORTS REALM IT WAS A NEW DIFFERENT IDEA THAT WAS VERY CREATIVE IN MIXING THE CARTOON WITH ACTION.

### **EDUCATION**

 BREAKING DOWN GAME PLAY AND PROVIDING OVERVIEW OF RULES/TERMINOLOGY IT HELPED ME UNDERSTAND THE GAME BETTER AND EXPLAINED IT MORE ON MY LEVEL.







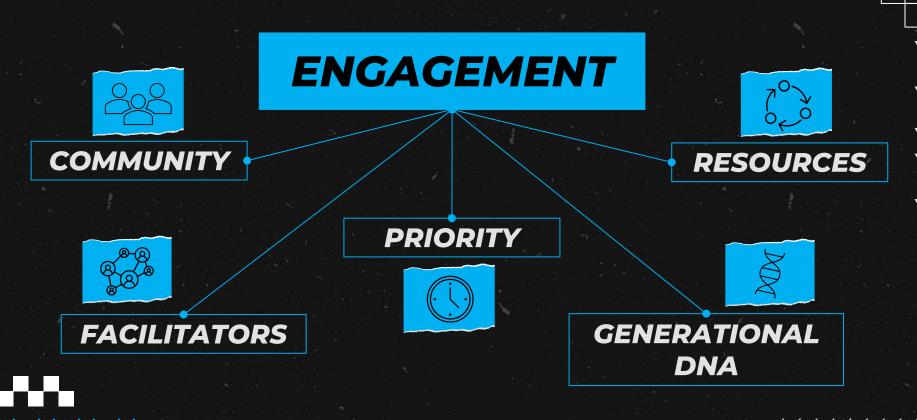








## THE SPORTS POLL FAN DYNAMICS



# THANKS QUIRK'S

### **CHAD MENEFEE**

EVP, Strategic Intelligence, SSRS/Sports Poll

**CMENEFEE@SSRS.COM** 

### **KAITLYN CONNOLLY**

**Manager, ESPN Research** 

KAITLYN.CONNOLLY@ESPN.COM



sports poll 30 years of intelligence

