

# knit

## Gen Z Sports Panel & Insights

Presented on May 6, 2021





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## Feedback from the Voice of Gen Z

- 🕒 60,000+ Gen Z Panel
- 🕒 Quant & Qual Research
- 🕒 City & Regional Targeting

Trusted by **50+** Brands

for providing Gen Z feedback





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## Gen Z Sports Panel & Insights

Presented on May 6, 2021

# The Sports Industry is struggling to engage and retain Gen Z



Gen Z is **2x** more likely to **never**  
**to watch sports**

Only **1 in 4** Gen Z'ers watch live  
sports at least **once per week**  
(vs 50% of millennials)



# Viewership is dipping across the board

2020 Viewership Trends:

**Stanley Cup Finals** dipped by 61%

**NBA Finals** were down 49%

**NFL** ratings down 7%

Least-watched **World Series** on record



# Gen Z Holds the Future for Sports Franchises

“If you **lose a generation**, it **destroys value** and the connective tissue. It’s what some of the big sports leagues are nervous about. Could we lose a generation because we didn’t give them **access and the products and services they want?**”



**Ted Leonsis**

Principal Owner of  
Washington-based NBA, NHL,  
WNBA teams



And it is urgent to understand  
this **next generation**

“There’s no strategy for bringing in a 35-year-old fan for the first time. You have to make them a fan **by the time they’re 18**, or you’ll **lose them forever.**”



**Tim Ellis**  
CMO, NFL



# Sports Leagues all agree Gen Z is the lifeblood of their leagues



“**Gaining and retaining young people** is key to future-proofing the NFL. So when we look at that generation, I personally look at it as the **lifeblood and health of the brand** and our business.”

**Tim Ellis**  
CMO, NFL



“The draw for sports historically has been this idea of connecting with others and **creating interactions and connection points**, whether at the ballpark or the water cooler at the office. We see the **younger generation has that same desire**, probably even more so in terms of connecting with friends.”

**Chris Marinak**  
COO, MLB



“We’re doing all these great things, but if they’re not resonating with that **next generation**, we need to tweak it and **listen a little more.**”

**Heidi Browning**  
CMO, NHL



“We are a sport of **digitally native fans** and have taken a direct strategy **aimed at engaging** Millennials and **Gen Z**, and our numbers have been consistently rising.”

**Nick Sakiewicz**  
Commissioner, NLL



“The challenge isn’t about finding **Gen Z**. It’s about attracting and **keeping their attention.**”

**Kate Jhaveri**  
CMO, NBA



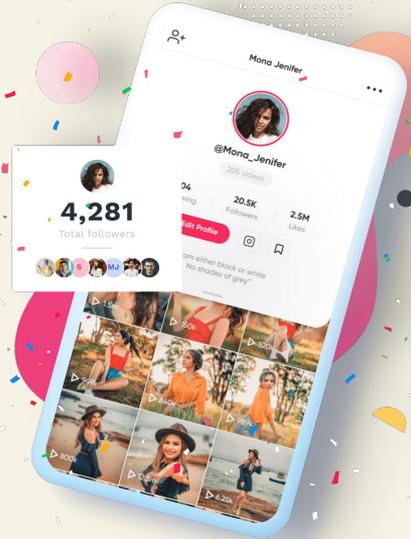
“We have an **audience** that delivers something that most other properties don’t – it’s **very young**, very diverse..”

**Don Garber**  
Commissioner, MLS

What's the  
**good** news?



Gen Z is still seeking the benefits of  
**Sports**, but through new avenues:



**Entertainment**



**Community**



# Gen Z's favorite forms of entertainment

1



Movies

2



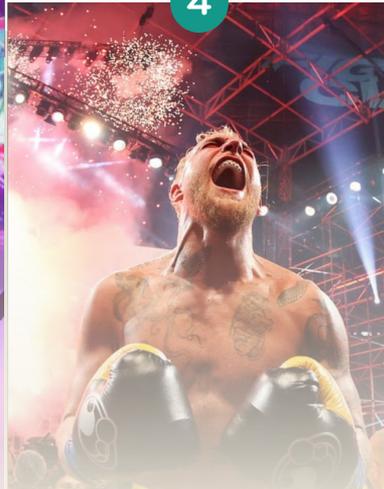
Music

3



TV

4



Sports

5



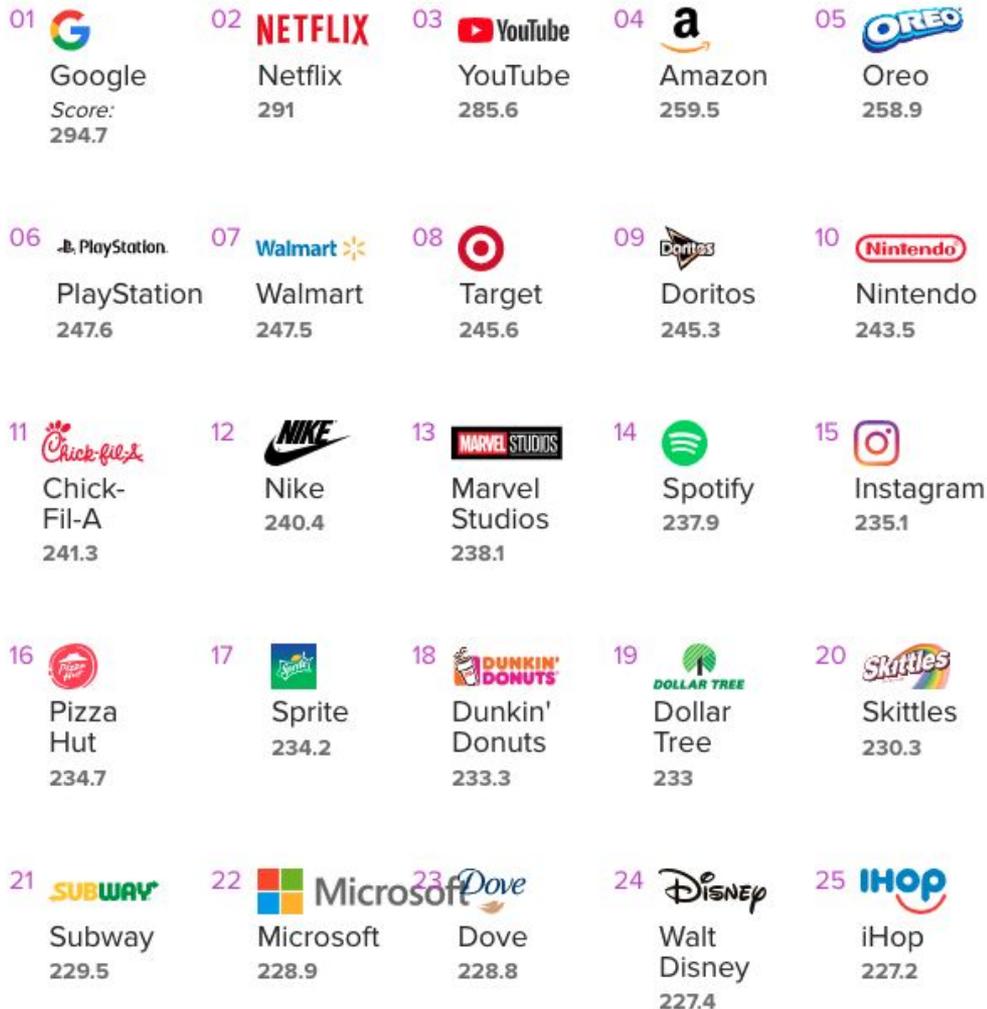
Gaming



**Knit Data:** "Please rank the following forms of entertainment from your favorite to least favorite. Based on mean response." n=127

And it's seen in

# Gen Z's most loved brands

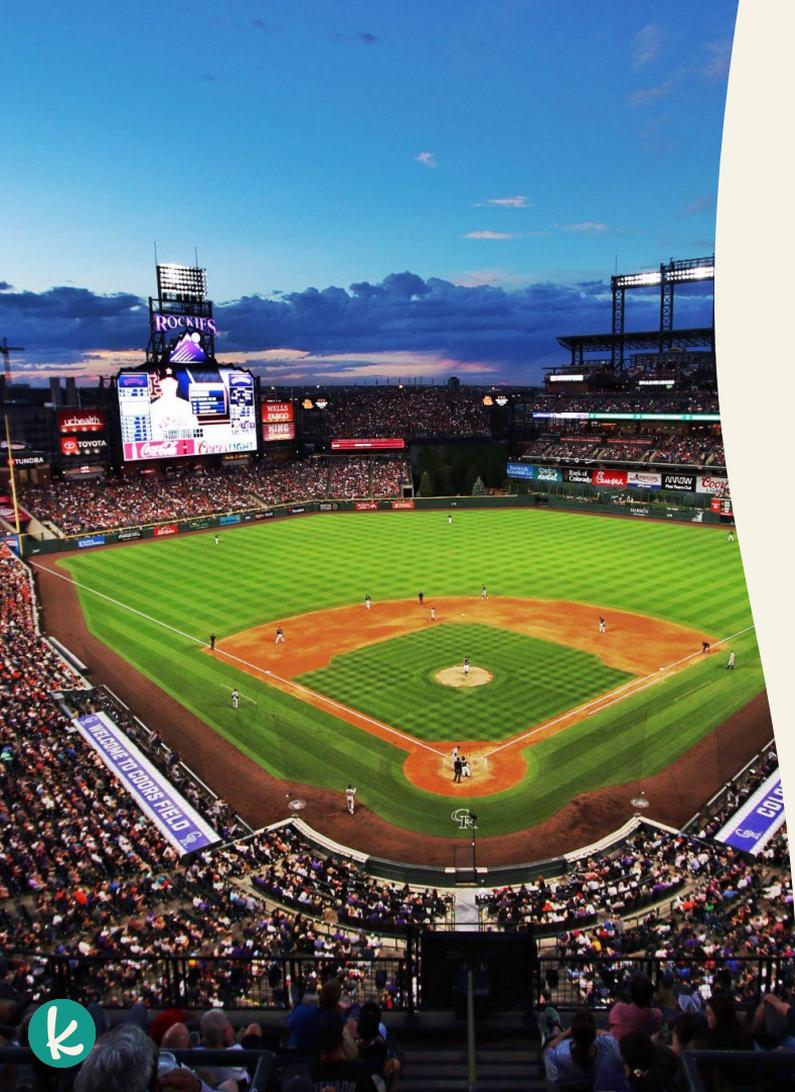


Source: [Morning Consult](#)



Gen Z is not a  
**problem** for the  
sports industry.

It's an  
**opportunity.**



*knit*

# 3 biggest points of frustration

within the sports industry

“I wish my favorite sport was....”

#1 answer from Gen Z

More interesting  
during broadcasts.



**Knit Data:** “I wish my favorite sport \_\_\_\_\_” Please rank the attributes below in the order that you most wish your sport was more like.” Based on mean response. n=127

“I wish my favorite sport....”

#2 answer from Gen Z

Had more ways  
to watch games



**Knit Data:** “I wish my favorite sport \_\_\_\_\_” Please rank the attributes below in the order that you most wish your sport was more like.” Based on mean response. n=127



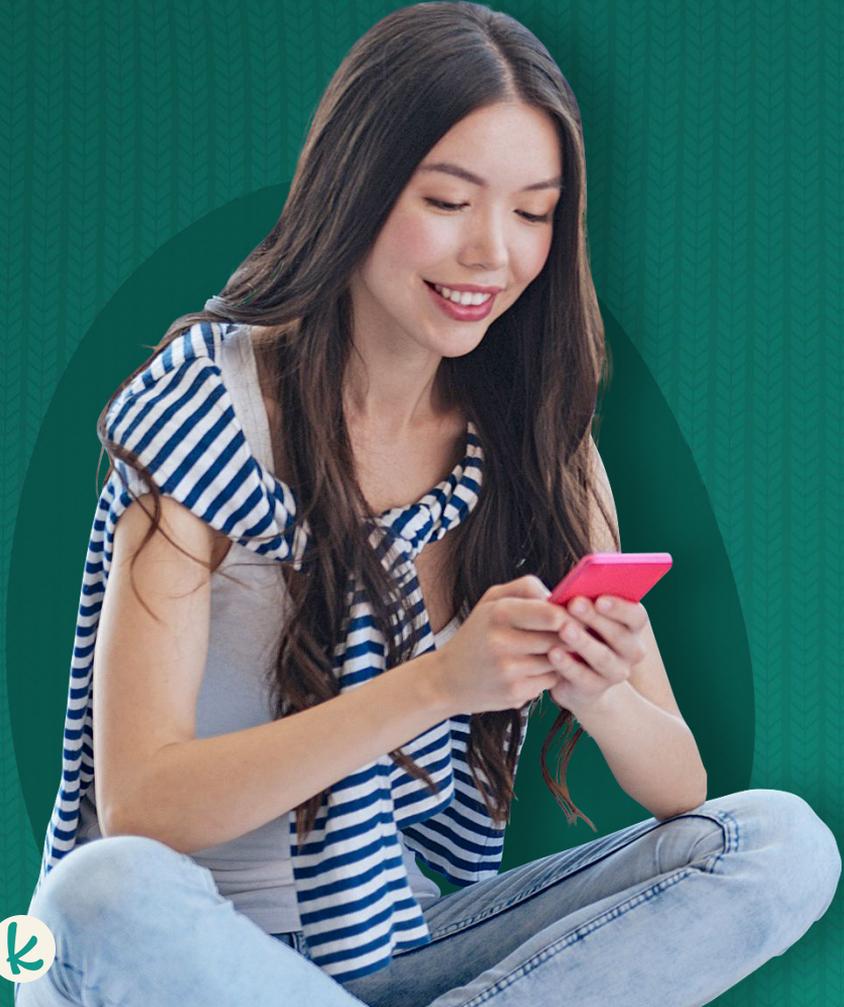
“I wish my favorite sport....”

#3 answer from Gen Z

Had more ways to  
interact with players



**Knit Data:** “I wish my favorite sport \_\_\_\_\_” Please rank the attributes below in the order that you most wish your sport was more like.” Based on mean response. n=127



Opportunity 1

# Digital fan engagement

and the perks that  
come with it



“I wish my favorite sport was....”

#1 answer from Gen Z

More interesting  
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**Knit Data:** “I wish my favorite sport \_\_\_\_\_” Please rank the attributes below in the order that you most wish your sport was more like.” Based on mean response. n=127

# How Gen Z consumes entertainment? Digital First

57%

NETFLIX

68%



79%



% of gen Z using each service daily



It's not just about "digital"...

# Personalization is key



Click to view Voice of Consumer  
Video on Youtube



So what can  
teams & leagues  
be **doing?**



Innovate for personalization  
on second screens...

95%

use a second device  
while watching tv



Source: [Marketing Charts](#)

# What is happening on 2nd devices?



**Whitespace moments**



**Live chatting for opportunities**



Click to view Voice of Consumer  
Videos on Youtube

# What opportunities are there?

## Embrace Sports Betting



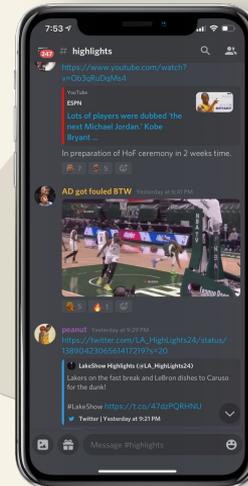
Lean into **partnerships** with newly popular betting providers to enhance live participation

## Showcase Real-time Highlights



Provide **exclusive** highlights and in-game content on social media and owned apps

## Join in on Real-time Convos



Create or join **communities** with your biggest fans to foster true fandom and discussion





## Case Study

# Tap to Cheer

Empowering real-time fan engagement



Creation of an immersive virtual experience

Integrating live viewing experiences with mobile

**140M "Taps"** on WNBA app

**75% lift** in WNBA app downloads

**68% lift** in regular season avg. viewing



Source: [Shorty Awards](#)

## Opportunity 1

# Digital Fan Engagement

### What you can do:

- ⌚ Build a strategy to leverage second devices during broadcasts
- ⌚ Personalize digital experiences – ideally integrated through broadcasts
- ⌚ Foster a community and join the conversation



# These principles transfer from URL to IRL



In-person attendance is less about the game with Gen Z and more about **social** aspects

Gen Z fills the “**white space**” by facilitating **social interaction**

Similar to “**going out**”

- Often times a **last min.** decision
- About the experience of **being with friends** more than the game itself



Click to view Voice of Consumer  
Video on Youtube



# What **opportunities** are there?

## MILLER PARK'S NEWEST EXPERIENCE THE MILLER LITE LANDING



## Stadium Experiences

Create spaces that better embrace free-flowing **social experiences**, including full-service bars, charging stations, high-def TVs & more.



## Subscription Tickets

Lean into Gen Z's **last minute** nature by offering subscription tickets that allow for last minute group outings to the game.



## Opportunity 2

# Next Gen Media

reinventing the traditional  
broadcasting model



“I wish my favorite sport....”



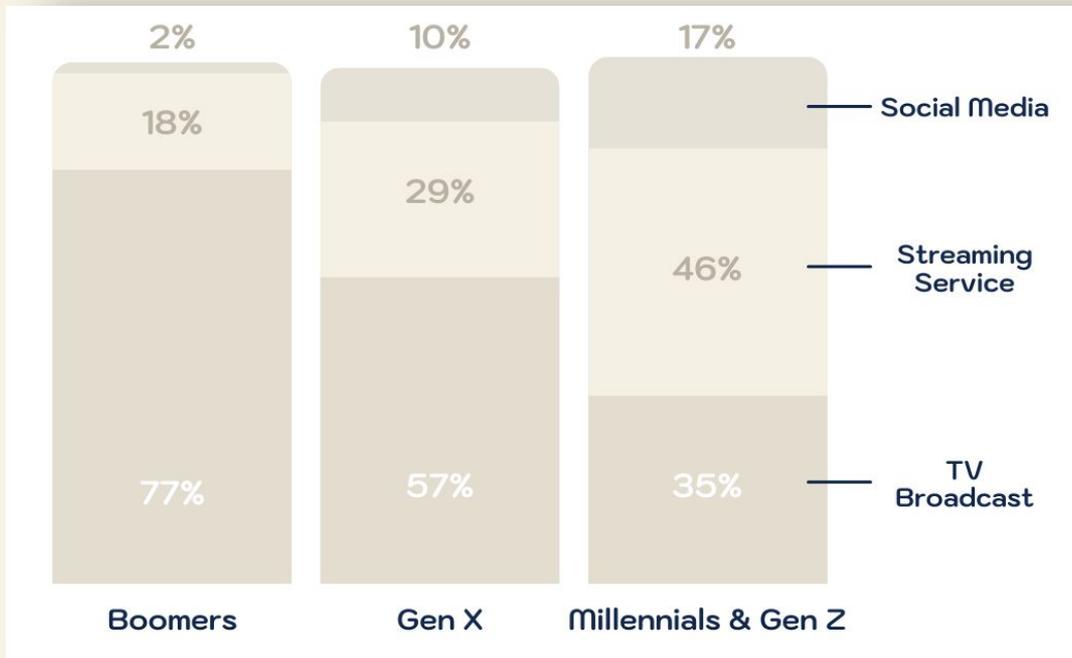
#2 answer from Gen Z

Had more ways  
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# Gen Z's sports watching habits are significantly different



**Most Common Live Sports Viewing Platform by Generation**



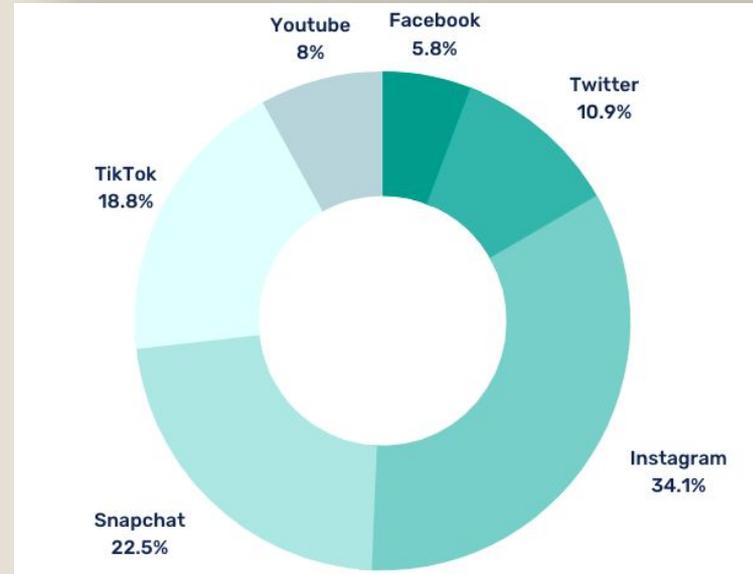
# Embrace their habits

## Catch this new generation where they are

What's **Gen Z** up to during the **day**?

**4.5**  
**hours**  
on **social** media

Where are they **spending** their **time**?



Source: [YPulse](#)

**Knit Data:** "Which social media platform do you spend the most time on?" n=830



# Gen Z is willing to engage with teams there... **a ton**

**4x**  
more likely

watch 3+ hours of  
non-game content

**60%**

Posted UGC of favorite  
sports team



# What social content does Gen Z want from their sports teams?



## Highlights

#1 requested type of content

**Knit Data:** "Please rank the following types of social media content that you would most like to see from your favorite sports teams" Based on mean responses. n=830





**UFC**

Case Study

# Snapchat Partnership

For exclusive content  
targeting a younger fanbase



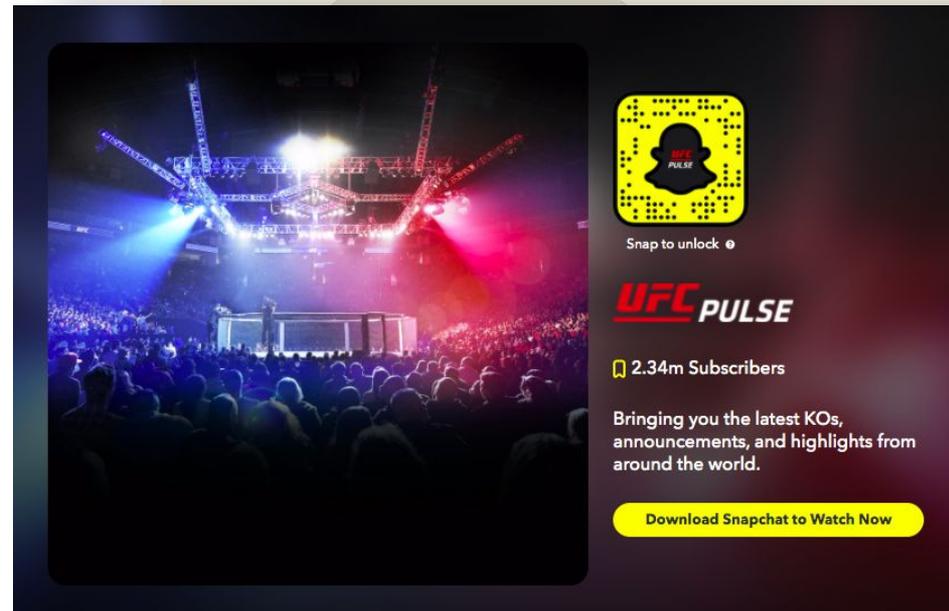
Embracing Gen Z's favorite platforms

To engage a new fanbase & drive UGC

Producing special **AR filters** for 20+ **Our Stories**

Producing **two shows** for Snapchat's Discover page

**UFC**



Source: [Marketing Dive](#)



Case Study

# Twitter Partnership

For personalized content on  
Gen Z's favorite players

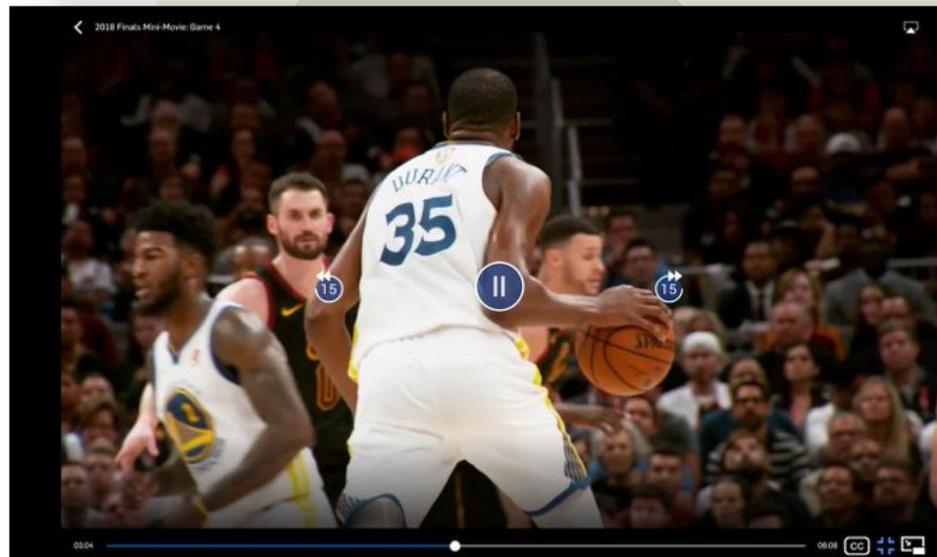


Embracing Gen Z's favorite platforms

To engage the fanbase  
with personalize viewing

Fan voting for **featured  
athletes** on the “Iso Cam”

Complementary **live stream** on  
Twitter w/ **exclusive** commentary



Source: [Cleveland.com](https://www.cleveland.com)

## Opportunity 2

# Next Generation Media

### What you can do:

- 🕒 Embrace social media for exclusive viewing & highlight content
- 🕒 Partner with Gen Z's favorite channels on innovative tech
- 🕒 Encourage participation through UGC, voting & more





### Opportunity 3

Lean into your  
community  
starting with your players



“I wish my favorite sport....”

#3 answer from Gen Z

Had more ways to  
interact with players



**Knit Data:** “I wish my favorite sport \_\_\_\_\_” Please rank the attributes below in the order that you most wish your sport was more like.” Based on mean response. n=127

What Gen Z really values:  
**Authentic Relationships**

**“Humans are greater  
than highlights”**



**Heidi Browning**  
CMO, NHL



# What values are you keying in on via social?

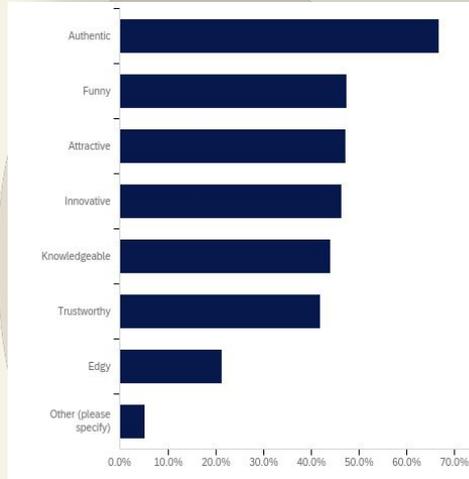
Why Gen Z says they follow brands & influencers:

#1 Authenticity

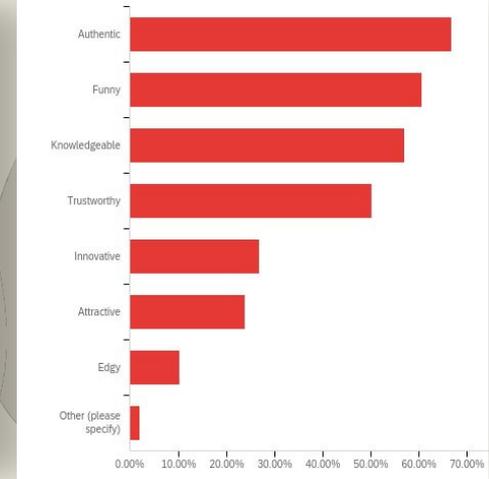
#2 Funny

Knowledgeable: #3 answer for influencers

Why Gen Z says they follow brands:



Why Gen Z says they follow influencers:



We've embraced

# Authenticity & Humor

with our Knit Members...

and it's increasing engagement



This is the beginning of your history with  
New Contact

05/04/2021 AT 2:27 PM

Hit me with some cheesy dad jokes ☐

VIA SMS - 05/04/2021 AT 2:27 PM

Why did the old man fall into the well?

MCKENZIE L - 05/04/2021 AT 2:28 PM

Status changed to Open by McKenzie Layne

05/04/2021 AT 2:28 PM

Why ?

VIA SMS - 05/04/2021 AT 2:28 PM

Because he couldn't see that well... 🙄

MCKENZIE L - 05/04/2021 AT 2:29 PM

😭😭😭😭😭😭😭😭😭😭 noooooooooooo

VIA SMS - 05/04/2021 AT 2:29 PM

🙄🙄🙄

VIA SMS - 05/04/2021 AT 2:29 PM

Lmao... thanks for taking our survey!

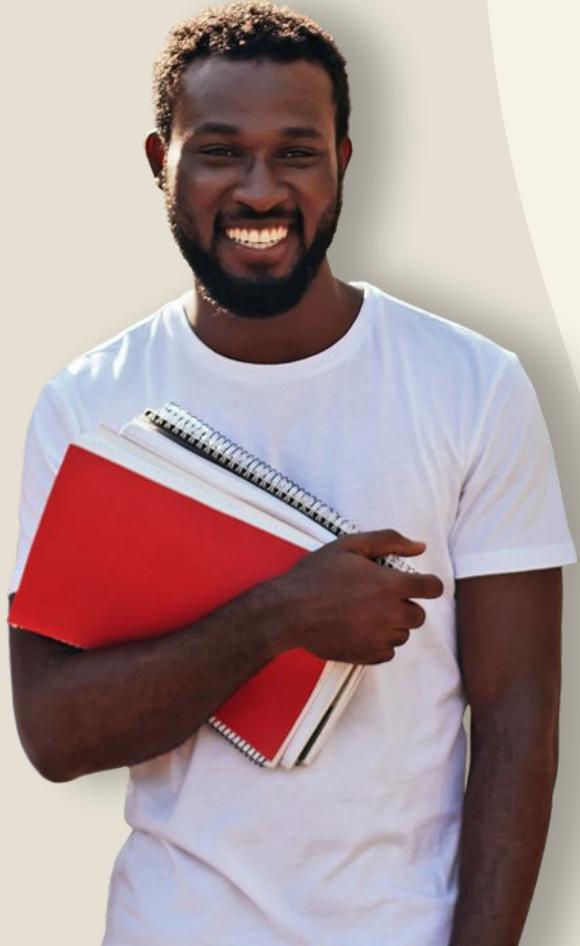
MCKENZIE L - 05/04/2021 AT 2:30 PM

Loved "Lmao... thanks for taking our survey!"

VIA SMS - 05/04/2021 AT 2:30 PM

My pleasure !

VIA SMS - 05/04/2021 AT 2:30 PM



How can **sports**  
leverage these  
principles on  
**social**?



# What social content does Gen Z want from their sports teams?

1



Highlights

2



“Day in the life”

3



Historic Moments



4) Game & score recaps 5) Social justice & community work 6) Interviews with players

**Knit Data:** “Please rank the following types of social media content that you would most like to see from your favorite sports teams” Based on mean responses. n=830

B·R  
**KICKS**

Case Study

# Influencer Takeovers

Powered by what Gen Z  
values most



Frequently **feature athletes**, embracing these qualities:

**Authenticity:** Raw, “in the life” footage

**Funny:** Natural, unforced dialogue & moments

**Knowledgeable:** Passionate, respected sneaker influencers, like PJ Tucker

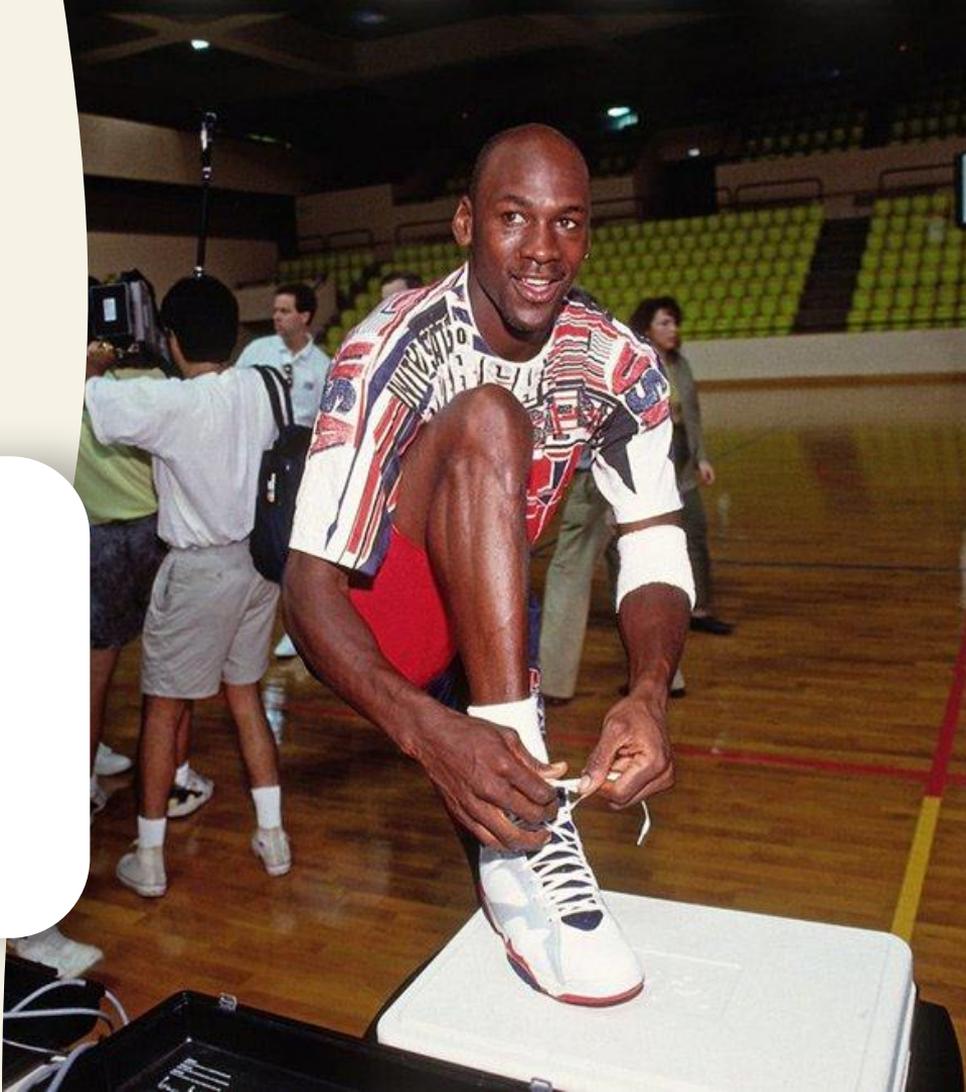


## Opportunity 3

# Lean into your community

### What you can do:

- 📌 Feature your athletes
- 📌 Capture their natural “day in the life”
- 📌 Leverage unscripted content





Bonus Opportunity

# Tap into Social Good



You've already heard Gen Z is diverse...



The **most diverse** generation yet.

&



They **expect** their brands, colleges & more to **reflect** inclusive values



Source: [Tallo](#)

And there's an opportunity to stand out

70% thinks that less than 25% of brands are **actually** socially conscious



Brands that **do good**, do well....

89%

more likely to support  
brands that support  
charitable causes



Knit Data: Social Good Study. n=350

knit



# Thanks

For More **Gen Z** Insights:

Dive in anytime:

[goknit.com/insights](https://goknit.com/insights)

Launch your own study:

[adhawan@goknit.com](mailto:adhawan@goknit.com)



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You make **hundreds** of decisions about Gen Z every week.

It's time to include them.