CHANGING THE GAME
How Gen Z Is Redefining Sports, Consumption & Sponsorship
Gen Z Has A New Vision For Sports

ABOUT THIS REPORT
Gen Z, like every generation, has a distinct set of values. Sports is the latest category that they are disrupting.

Whistle and Cassandra explored the attitudes about and perceptions of sports among young men in the U.S. through:

- Quantitative survey of 501 men aged 13 to 34
- Qualitative interviews among 15 men aged 15 to 20

The results uncovered several factors that have modern young people reconsidering what qualifies as a sport and why, how they consume this content, and the role of advertisers in this space. If brands want to connect with young men and have the greatest return on their sports marketing investment, they must understand sports as defined by Gen Z.

ABOUT THE AUTHORS
Founded in 2014, Whistle is an authority on sports and entertainment for today’s generation. With a strategy rooted in analytics and consumer insights—to ensure we are in sync with young men today—Whistle creates, curates and distributes content across social media, YouTube and premium OTT platforms.

For nearly 20 years, Cassandra has worked with brands to tap into young consumer mindsets and uncover their unique values. Cassandra leverages research to understand trendsetting young people and anticipate market shifts.

PRIMER: GEN Z MEN ARE...

...IN THEIR TEENS AND EARLY 20’S
Gen Z men are those born from 1997 to present, making them age 21 and younger (unless otherwise noted, data in this document refers to males 13 to 21).

...DIGITAL BORN
Gen Z men have been indelibly marked by coming of age during the birth of social media and the video game boom.

...HARD WORKING
Culturally, Gen Z men have been raised to value work and effort, and they enjoy learning and practicing new skills.

...OPEN-MINDED
Gen Z men are progressive in their social attitudes, particularly when it comes to race, gender, and sexuality.

...COMPETITIVE
Unlike their Millennial counterparts who were raised in the era where everyone received a trophy, Gen Z value a meritocracy.

DEFINITIONS: FOR THE PURPOSES OF THE RESEARCH...

TRADITIONAL SPORTS:
The “Big 5,” including football, basketball, baseball, hockey, and soccer.

NON-TRADITIONAL SPORTS:
Any activity or competition—aside from the Big 5—that young people consider to be a sport, e.g., competitive gaming, physical skills competitions, extreme running, obstacle courses and trick shots.

1Cassandra, 2015-2018
KEY FINDINGS

90%
say there are many different definitions of sports today

76%
think that an activity has to have practiced skills to be considered a sport

56%
feel that non-traditional sports are more relevant to their generation than traditional sports

65%
keep up with non-traditional sports by watching videos on YouTube/social media

69%
say advertisers are a welcome part of non-traditional sports

Nearly Any Physical Activity Can Be A Sport
Beyond traditional sports, Gen Z men also look to emerging sports that are more reflective of their interests. These non-traditional sports have already challenged the notion of what it takes for something to be worthy of young men’s time and attention.

Sports Rely On Smarts, Not Just Strength
Gen Z defines a sport as something that has defined rules, requires practiced skills, and includes an element of competition. In their eyes, sports not only need to be physically active, but also showcase mental strategy; they need competition, but not trophies.

Gen Z Men Are Drawn To Non-Traditional Sports
A striking departure from past generations, Gen Z views non-traditional sports as more creative, innovative, and relevant to their generation than traditional sports. Z’s have been involved from the beginning, feel invested, and enjoy spreading the word to their peers.

Sports Now Live On Social Media
Growing up with mobile devices and social media has influenced their content preferences and consumption habits, sports included. Young men gravitate toward sports that fit their preferred media: the non-traditional sports that were born on social media.

Brands Can Reach Z’s Through Non-Traditional Spots
Advertisers can benefit from a less-crowded market where they can be the focal point. Investing in non-traditional sports allows brands to earn Gen Z’s respect, consideration, and powerful word-of-mouth support.
THE EVOLUTION OF “SPORTS”

As the most progressive generation to date (68% of teen boys say their generation is open-minded), 9 in 10 Gen Z men embrace the notion that there are many different definitions of what activities can be considered sports today. Young men say, as long as an activity has rules (“to keep the sport fair”), involves some level of competition (“this makes it more entertaining”), and requires skills (“it’s mind blowing what they can do”), they are willing to view it as a sport.

As a result, 4 in 5 Gen Z men say that their generation is more likely than past generations to enjoy a broader range of sports. As one 20-year-old man explained, any activity can become a sport among his generation “as long as it is accepted as a sport.” This includes sports born of the digital era and those that demand new skills, as well as those that reflect Z’s value of hard work and desire to be part of a like-minded community.

80% of Gen Z men say the definition of sports is changing

“The definition of sports is different than how my parents would define it because they would just think of the traditional sports such as football and basketball. Growing up, they probably watched these traditional sports as they were not able to experience the growing popularity of these non-traditional sports.”

– Ivan, 18

“My parents will consider traditional sports as sports and will fail to consider the other ones. They will … neglect sports like swimming and track.”

– Jeffery, 19

“I definitely can see esports becoming a mainstream sport. ESPN has already had interviews with some of the top esports players… they even broadcasted some of the major tournaments on TV.”

– Isaac, 15

1 Cassandra, 2015
2 Cassandra, 2017
SKILLS & STRATEGY ARE MORE IMPORTANT THAN SCORES & TROPHIES

Gen Z’s broader definition of sports is rooted in their generational values. Admiring hard work, they don’t place as much emphasis on whether that work is mental or physical, and this carries through to their perception of sports.

- Practiced skills (76%) are more important to sports than physical activity (70%); mental strategy isn’t far behind (62%).

Gen Z men see competition as a reward unto itself, which is distinct to Gen Zs compared to their Millennial counterparts. Knowing that they or an athlete they admire has trained hard and strove for greatness is a marker of success in their eyes. They don’t measure the quality of a player or person in prizes but rather what they bring to the competition overall.

- Winning trophies (41%) is less important than simply competing well (78%).

“I THINK THAT THE COMPETITION AND STRATEGY LEVELS ARE MORE IMPORTANT [THAN PHYSICAL ACTIVITY] TO BE A SPORT.”
– ISAAC, 15

“A LOT OF SPORTS DO NOT CONTAIN PHYSICAL CONTACT OR HIGH ENDURANCE, LIKE GOLF AND ARCHERY, BUT THEY ARE BOTH COMPETITIVE AND REQUIRE A LOT OF PRACTICE AND SKILL. ESPORTS ALL REQUIRE SKILL WITH WHATEVER DEVICE YOU ARE USING AND IS COMPETITIVE.”
– ERIK K., 19

“COMPETING AND TRYING TO WIN WILL ALWAYS BE ENTERTAINING TO ME, REGARDLESS OF THE SPORT.”
– HAYDEN, 20

TOP ATTRIBUTES NEEDED FOR SPORTS

Q: What attributes does an activity need to have to be considered a sport? Please tell us on a scale of 1-5 where 5 is definitely needed to be considered a sport and 1 is not at all needed to be considered a sport. Summary of 4+5.

- Defined rules (78%)
- Element of competition (78%)
- Practiced skills (76%)
- Physical activity (70%)
- Clear winner (68%)
- Mental strategy (62%)
- Keeping score (61%)
- Prizes or trophies (41%)
GEN Z MEN ARE DRAWN TO MODERN, NON-TRADITIONAL SPORTS

Gen Z men are more likely than their Millennial counterparts to say that non-traditional sports are relevant to their generation. As their definition of a sport is changing, they are looking to engage with sports that are evolving to meet their new expectations, supplementing their traditional sports diet with new sports like gaming, trick shots, and extreme running.

“**I watch [non-traditional sports] because they can be just as entertaining as watching traditional sports.**”
- Isaac, 15

“I **like newer and faster [sports]**”
- Caleb, 15
CREATIVITY, INNOVATION APPLY MORE TO NON-TRADITIONAL SPORTS

Q: For the following statements, please indicate whether it applies more to traditional or non-traditional sports.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Traditional Sports</th>
<th>Non-traditional Sports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative</td>
<td>30%</td>
<td>70%</td>
</tr>
<tr>
<td>Innovative</td>
<td>32%</td>
<td>68%</td>
</tr>
<tr>
<td>Evolve Over Time</td>
<td>40%</td>
<td>60%</td>
</tr>
</tbody>
</table>

*Creative and innovation are critical for success with Gen Z men as they allocate their attention. Young men view non-traditional sports as more relevant to their generation than traditional sports because they specifically link back to the qualities that Gen Z values:

- **Creativity is the #1 form of social currency** among young men\(^4\)
- 75% feel better about themselves when they buy/use products that are *innovative*\(^5\)
- 77% say it’s important for sports to **evolve over time**
Z’S DRAWN TO CLASSIC SPORTS COMMUNITIES

One of the primary draws of any sport for young people is that it engenders a sense of community. Mainstream sports excel in delivering this feeling of togetherness through their longstanding history, which fully cements the connection that fans feel.

“I LOVE THE HISTORY THAT TEAMS HAVE WITH EACH OTHER AND THE UNBREAKABLE FAN BASES THAT... LEGENDARY CITIES/STATES HAVE.”
– ERIK K., 19

“FOLLOWING TRADITIONAL SPORTS LEAGUES, ALWAYS INVOLVES CLASHING FAN BASES AND LOYALTY TO ONE’S TEAM. IF THERE WASN’T A STRONG FAN BASE FOR A SPORT, I WOULD PROBABLY NOT WATCH IT AS INTENSELY AS I WATCH MY FAVORITE FOOTBALL OR BASKETBALL TEAM.”
– KEVIN, 20

“IT IS ALSO ENJOYABLE TO WATCH MY FAVORITE TEAMS AND PLAYERS PLAY SO I CAN ROOT FOR SOMEONE AND DO SO ALONG THE MANY OTHER FANS.”
– JEFFERY, 19

NON-TRADITIONAL SPORTS COMMUNITIES RIVAL THOSE OF TRADITIONAL SPORTS

Non-traditional sports have rapidly growing fan bases—communities that mirror those of traditional sports. With 46% of Gen Z men saying that they feel a need to keep up with sports overall to be part of the cultural conversation, they’ve become a mandatory part of their social lives. One 15 year old noted “Some [non-traditional sports] are very popular so you have to stay in the loop about them”; a majority (53%) of Gen Z men now make time to follow non-traditional sports. Young men feel a particularly strong, grassroots connection to these communities because they were there at the start and believe they can shape the future of non-traditional sports.

“My passion of sport drew me to [non-traditional sports] and just staying in the loop with current sports events to socialize about them with my friends.”
– HAYDEN, 20

“It is becoming more and more cool to be a fan of something, and the way we interact with our phones, the internet, media, etc. has made it easier and easier to be more and more involved in whatever you are a fan of.”
– JACOB, 18

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1/2 of men aged 13-20 are likely to try a trick shot of their own after watching them on YouTube⁸

NEW SPORTS COMMUNITIES ARE INTERACTIVE

Their strong stake in these non-traditional sports communities has made the content more participatory. Gen Z men see trick shots as accessible, potentially achievable—and they imitate them. In the same way that generations past played pick-up basketball, young men now also strive to replicate the moves they see across social media and upload shot-for-shot comparison videos to demonstrate their skills. In eSports, they can even test their skills directly against the pros when playing online.

“IT’S SO COOL TO SEE THE GREATEST PLAYERS PLAY THE SAME VIDEO GAME THAT I PLAY AND SEE HOW WELL THEY PERFORM. THESE ESPORTS PLAYERS ALSO PROVIDE GREAT ENTERTAINMENT LIKE THEIR FUNNY HUMOR WHILE STILL BEING ABLE TO PLAY AT THEIR BEST.”
– JEFFERY, 19

“IT’S FUN AND EXCITING TO WATCH THESE GAMES. AT TIMES I FEEL LIKE I AM PART OF THAT TEAM MYSELF.”
– VICTOR, 15

“WHEN I WATCH A VIDEO IT JUST KIND OF INSPIRES ME TO DO SOMETHING LIKE THAT FOR MYSELF.”
– DYLAN, 20

⁸Whistle/Qualtrics, June 2018
⁹Whistle/Mindswarms, July 2018
KEEPLYING UP WITH NON-TRADITIONAL SPORTS

SOCIAL MEDIA TAPS IN

These digital natives are migrating their overall viewing from TV screens to handheld devices and from TV networks to social networks. Teen boys aged 14 to 17 spend more than twice as much time streaming video as they do watching live TV. This includes their sports consumption, which relies on the social spaces where they already spend time; 4 in 5 young men follow sports differently than their parents do.

Non-traditional sports like skills challenges and competitive gaming are a natural fit as this content and its community were born online. Young men are already used to watching and following on social media. Conversely, traditional sports developed their following and community through in-person engagement and TV viewing and are having to be adapted for Gen Z’s preferred platforms.

Q: Thinking about non-traditional sports you follow, how do you follow them?

- Watch on TV: 29%
- Watch on YouTube/social media: 65%
- Follow on Social Media: 53%
- Follow on Sports News Sources: 16%

73% of Gen Z men visit YouTube daily

"IF I WERE IN CHARGE OF TRADITIONAL SPORTS I WOULD BROADCAST THEM ON YOUTUBE. BROADCASTING THEM ON YOUTUBE WOULD BRING MORE VIEWERS TO THE SPORT AND MORE PEOPLE COULD EXPERIENCE THE ENTERTAINMENT."  
– JULIAN, 15

"I WATCH AND FOLLOW DIFFERENT TWITTER FEEDS, YOUTUBE VIDEOS, VIDEO CLIPS THAT GET POSTED OF THE GAME, AND PLAYERS. FOR EXAMPLE, DURING PAY-PER-VIEW EVENT THAT MY DAD DID NOT BUY I WOULD WATCH THE UFC TWITTER FEED FOR LIVE RESULTS."  
– VICTOR, 15

"THE COMPETITION IS FUN TO WATCH, SO THE MORE WAYS TO WATCH AND ENJOY [SPORTS] THE BETTER IN MY OPINION."  
– ISAAC, 15
A ZERO SUM GAME?

A majority of young men already spend more time following non-traditional sports than traditional sports. And they are evenly split on whether there is more time to follow new sports, versus whether following new sports takes time away from those they already follow. As non-traditional sports continue to grow, they will take over an even greater share of audience from traditional sports.

FOLLOWING NON-TRADITIONAL SPORTS TOPS FOLLOWING TRADITIONAL SPORTS

Q: Please pick the statement that is most true for you.

- 52% I spend more time following non-traditional sports
- 48% I spend more time following traditional sports
- 50% There is always time to follow new sports
- 50% Following a new sport takes time away from following other sports
THE BENEFITS FOR BRANDS

GETTING THROUGH TO GEN Z

Gen Z men are frustrated that traditional sports are overloaded with marketing messages and sponsorships. As a 20-year-old man explained, the level of advertising has gone too far “because it takes away from the game.” Looking to avoid ads, most young men prefer watching highlights (55%) over full games (45%).

While some brands have begun to connect with these emerging games and events, non-traditional sports have yet to pass the tipping point where advertising overwhelms. More than two-thirds of young men (69%) still say brands are a welcome part of non-traditional sports, and a majority (54%) say brands can capture their attention by getting involved in non-traditional sports—presenting a clear opportunity for brands eager to stand out from a sea of marketing messages.

WINNING THE ATTENTION GAME

“Companies can capture my attention by...”

54% 46%

Getting involved with a non-traditional sport I follow Getting involved with a traditional sport I follow

Q: Please pick the statement that is most true for you.

69% of Gen Z men say brands are a welcome part of non-traditional sports

“I PREFER WATCHING HIGHLIGHTS TO AVOID WATCHING COMMERCIALS.”
– ERIC B, 19

“[BRANDS THAT ADVERTISE OR SPONSOR NON-TRADITIONAL SPORTS ARE] TRYING TO DIVERSIFY WHO THEY WANT TO REACH OUT TO. I THINK IT IS VERY IMPORTANT HOW REDBULL USES NINJA IN FORTNITE.”
– DAVIS, 20

CHANGING THE GAME: HOW GEN Z IS REDEFINING SPORTS, CONSUMPTION & SPONSORSHIP

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SPONSORSHIP OF NON-TRADITIONAL SPORTS ADDS UP

Not only will the messages get through, associating with non-traditional sports has a clear benefit for brands. Nearly 3 in 5 young men say it’s important for brands to support the sports they follow and watch—and Gen Z men are watching non-traditional sports. Those that get involved early can earn endemic status and help define the lifestyle connected with emerging sports, establishing a lasting connection between the brand and the sport as it reaches the mainstream.

“TO ME [A BRAND ADVERTISING AROUND SPORTS] DOES [MATTER] BECAUSE I SEE THAT THEY ARE PASSIONATE ABOUT SPORTS JUST AS I AM SO IT GIVES ME A CONNECTION TO THEM.”  
– HAYDEN, 20

“[WHEN A BRAND SUPPORTS A NON-TRADITIONAL SPORT] IT TELLS ME THAT THEY ARE AWARE OF THE UP AND COMING SPORTS AND AREN’T AFRAID TO TAKE A RISK.”  
– ISAAC, 15

“NEW EMERGING SPORTS HAVE BIG POTENTIAL AND [ADVERTISING OR SPONSORING] COULD DETERMINE THE BRAND THAT PEOPLE ASSOCIATE WITH THE SPORT OR SPORTS STAR.”  
– ERIK K, 19

Brands that advertise around and sponsor sports in a non-disruptive way not only earn a halo for supporting the sports young men love, they also earn an added degree of purchase consideration. The increased likelihood of mentions in their conversation with friends and attention on social media are powerful given how this generation makes decisions. Seven in 10 men aged 14-20 are more likely to buy a product or service if a friend endorses/promotes it, and 65% are more likely to buy if a social media influencer endorses/promotes it.11

11 Cassandra, 2017
DETAILED METHODOLOGY
This report was generated through an online quantitative survey fielded from August 7-12, 2018, among young men in the U.S. Whistle & Cassandra interviewed a nationally representative sample (based on age, gender, ethnicity, and region) of 501 13- to 34-year-old young men. In addition, 15 qualitative online interviews were conducted from July 31-August 2, 2018, with 15- to 20-year-old young men for deeper contextual understanding.

Unless otherwise noted, data in this document refers to 13- to 21-year-old young men. Previous Cassandra and Whistle primary research is also leveraged in this report and sourced throughout.

ABOUT WHISTLE
Whistle is Entertainment. Entertainment meticulously crafted for today’s generation by embracing their passion points and appealing to their action-oriented mindset.

We expertly blend our proprietary insights, diverse creator community, production chops and deep analytics to create and curate “breakthrough” content—originals and branded—for distribution via our channels and a carefully vetted roster of strategic partners.

Whistle’s programming is relatable, fun and inclusive, constantly evolving to reflect the tastes of this generation.

Whistle - Everybody Plays. Come With?

ABOUT CASSANDRA
Cassandra helps leading brands See Tomorrow®. Comprised of cultural strategists and business intelligence experts, the Cassandra team anticipates consumer-driven market shifts by understanding trendsetting young people. Their work anticipates these shifts, so companies are primed for what’s happening now and next, and prepares brands for the future. For nearly 20 years (before “Millennials” became a buzzword), Cassandra has worked with brands to tap into young consumer mindsets that hold the keys to their future.