



Engaging
Sports Fans
& Gen Z:
The New
Playbook



ENGAGING SPORTS FANS & GEN Z: THE NEW PLAYBOOK

The world of today is dramatically different than five years ago. The pace of technological change is increasing rapidly, we are in the middle of a digital revolution and a generational shift, simultaneously. Baby Boomers are hitting retirement age, millennials are now the **largest adult cohort** worldwide, and Gen Z, the first generation to truly be considered digital natives, are fast coming of age already making up over a **quarter of the global population** (26%).

Viewer engagement and media habits are different between each generation. Baby Boomers want their content differently than millennials, and Gen Z, as a technologically savvy generation, wants it much differently than traditional methods.

Gen Z is poised to change the world, including how they consume, interact and engage with content, fast. To explore this change in viewer engagement across generations we commissioned a study. The results confirm a seismic change in media consumption habits and content preferences across generations.

It will not come as a great shock to discover that an ever-increasing amount of content is being consumed via smartphone. ***But, what is surprising is the change in the type and duration of content being sought, and the extent to which it is being viewed via mobile phones or across social media as opposed to more 'traditional' broadcast platforms.***

In this ebook, we will explore some of the top findings from the study, focusing on sports consumption habits - surveyed thousands of content consumers and sports fans in the US and the UK - and dives into the impact these revelations have on content production.

We will show why broadcasters, content creators and streamers alike must rethink the form and nature of the content they produce if it is to connect with younger audiences like Gen Z and millennials. In today's fast-paced media landscape, content creators must reevaluate their workflows and tools to engage viewers across generations and demographics to form lasting connections and establish loyal, long-term viewers.

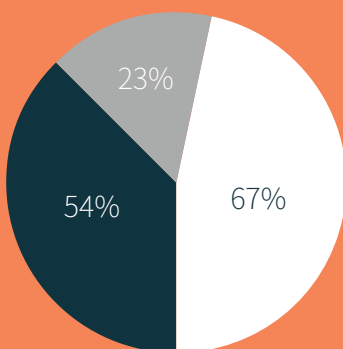
Learn more at vizrt.com

GEN Z
A GEN Z IS
ANYONE BORN IN
THE LATE 1990S
AND THE EARLY
2010S.

MILLENNIALS
A MILLENNIAL IS
ANYONE BORN
BETWEEN 1980
AND 1995.



PREFER TO WATCH SPORTS ON THEIR PHONES



- Gen Z (67%)
- Millennials (54%)
- Gen X (23%)

¹ <https://dictionary.cambridge.org/dictionary/english/gen-z>

DEFINING GEN Z

Gen Z refers to people born in the late 1990s and early 2000s¹. Members of the first generation to have never known a world without the internet, Gen Zers (sometimes referred to as Zoomers) have been described as “**collaborative, self-reliant and pragmatic.**” This pragmatism is especially notable given the profound technological changes of the past 20 years, which have had a massive impact on the way Gen Z perceives – and engages with – the world.

In many countries, Gen Z constitutes the most racially and ethnically diverse generation in history. For example, in the US, more than 48% of Gen Z is non-white according to Pew Research Center . Growing up in communities – and a world – that are increasingly multicultural, Gen Zers are exposed to more cultural influences than ever before.

This translates to an expectation to see their diversity and values reflected in the full range of broadcast and media they interact with. Gen Z is also faced with more media options than other generations, but they prefer ‘snackable’ content – often viewed on the phone – over long-form programming. Over half of Gen Z (67%) prefer consuming sports content on their phones while on the go (vs 54% millennials and 23% Gen X). And 39% of Gen Z respondents opt for highlights or catch up content over live.

To capture the attention of this influential, and soon to be dominant generation, broadcasters and content services will have to adapt if they are to form a meaningful – and enduring – engagement with Gen Z.



THE SHIFT FROM TRADITIONAL MEDIA TO DIGITAL PLATFORMS

Our research confirms, Gen Z is migrating from traditional media towards an increased reliance on digital platforms. This does not mean TV's dominance of live sports is at an end; in fact, *our survey reveals that it remains the top choice for 76% of respondents, suggesting that a big screen experience is still desired for major tournament matches and championship finals.*

However, the research also revealed that not only does Gen Z watch more sports content on their phones, 38% stated it is how they consume all their content. Why? Well, half (48%) cite accessibility, but ease of communication is an influence too with the second biggest reason for mobile phone consumption being the ability to chat and share content quickly and easily with friends.

It isn't just our research that confirms this use of the digital platforms for younger generations, *a study by Snapchat* found that a majority of Gen Z smartphone users (64%) say they are constantly connected online with 57% admitting that they feel insecure without their mobile phone.

Our research also unearthed some interesting developments about social media and sociability (or lack thereof). 81% of respondents prefer to watch sports live, yet nearly two-thirds of Gen Z and almost half (47%) of millennials frequently use social media to catch up on sports, taking the viewing experience online instead.

71% of Gen Z state they often, or very often watch sports content on social media.

But simultaneously, there has been a huge shift away from watching sports outside of the home. *Only 1% of respondents for example, would go to a sports bar or pub to watch live.*

GEN Z WATCH
MORE SPORTS
CONTENT ON
THEIR PHONE

38%

*stated it is how they
consume all their
content*

WHY?

48%

cite accessibility

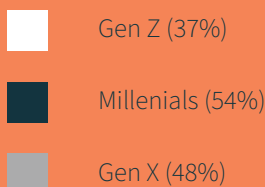
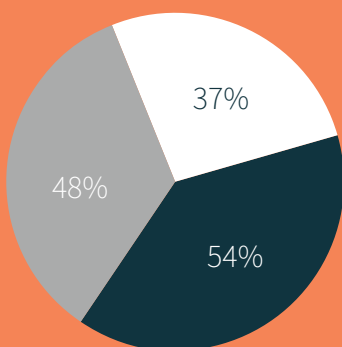
71%

*of Gen Z state they
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77%

OF SPORTS
FANS AGREE
THAT GRAPHICS
ARE IMPORTANT,
OR VERY
IMPORTANT,
WHEN
WATCHING ON
THE GO

VIRTUAL
STUDIOS
HELP FANS TO
UNDERSTAND
CONTENT
BETTER



Most Gen Zers watch sports at home alone now, (69% vs 32% of millennials), or, randomly, with their pet (5%), but a majority of respondents (55%) would still typically watch sports with friends and family.

In line with a more piecemeal approach to content, Gen Z prefers to watch sports highlights 23% more than other demographics. Many only 'often' (54%) or 'sometimes' (18%) watch a full match/game from start to finish, suggesting a deeper influence from the nature of so much social media content consumption.

What sports are they watching? Our findings show that soccer continues to dominate sports consumption in the UK, with more than 70% of respondents saying it is their favorite sport to watch. In the US, American Football, soccer, and athletics, like track and field, are the top choices for sports fans. There has also been an increase in people watching tennis, Formula One, badminton, martial arts, and esports.

Interestingly, a huge majority of respondents (80%) are still watching sport 3-7+ times per week. Therefore, we can safely conclude that – however challenging it might be to adapt to new viewing habits – Gen Z still constitutes a massive market potential for content services and their advertisers.

REAL-TIME DATA-DRIVEN GRAPHICS PROVEN TO RETAIN AND ENGAGE VIEWERS

One way to immerse audiences regardless of demographic is to add to the visual experience. Augmented reality (AR) graphics, virtual studios, sports analysis and replays are integral to engage most audiences, not just Gen Z viewers.

77% of sports fans agree, graphics are important, or very important, when watching on the go. The importance of additional visuals for feeling engaged with sports content increases for the younger demographics. For example, 56% of Gen Zs in the UK agree that graphics and virtual elements help them understand the game/match better, compared to 52% of all surveyed. Virtual studios also prove popular as 41% of respondents are more likely to watch sports commentary if a virtual studio is used.

Not only are all sports fans more likely to watch the content if it uses a virtual studio, they also understand the content better (37%). These numbers increase to 48% for Gen Z and a surprising majority of millennials (54%).

Visual elements like AR graphics or virtual sets are also integral to encouraging Gen Zers to watch sport for longer periods (63% of Gen Z vs 31% of the total surveyed in the UK).

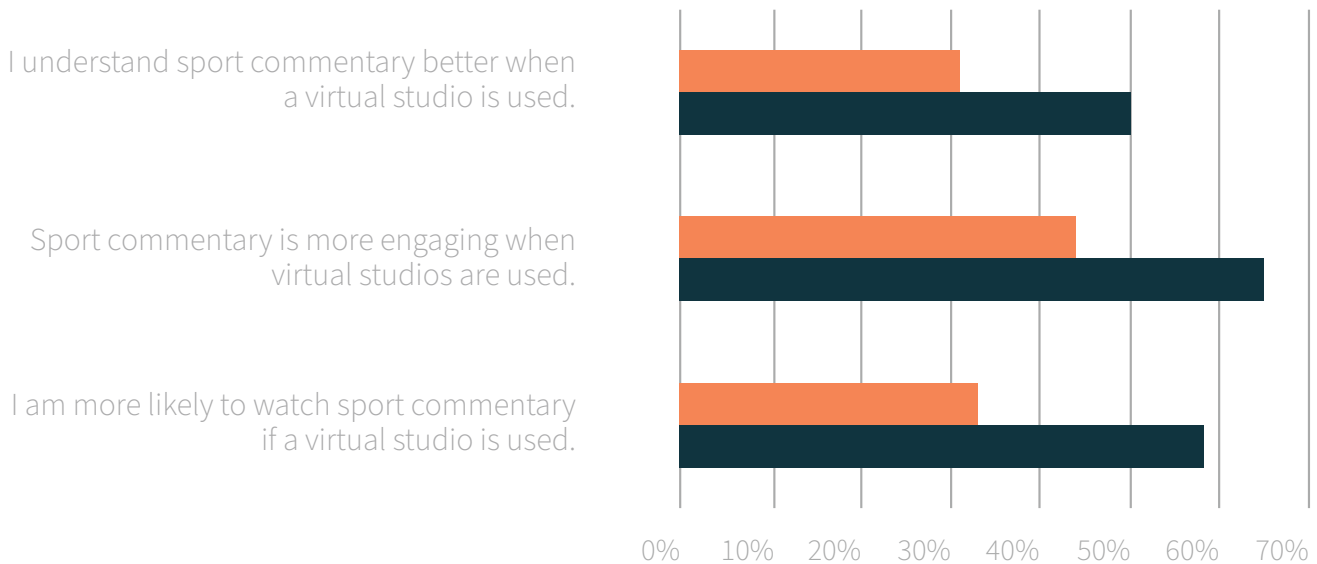
A similar picture emerges when we look at the engagement habits of Gen Zers in the US – this time focusing on virtual studios, which are increasingly prevalent in production across different sports and tournaments.

In this case, a majority of US Gen Z (65%) and millennials (63%), and even more of Gen X (76%) agree that sports commentary is more engaging when virtual studios are used.

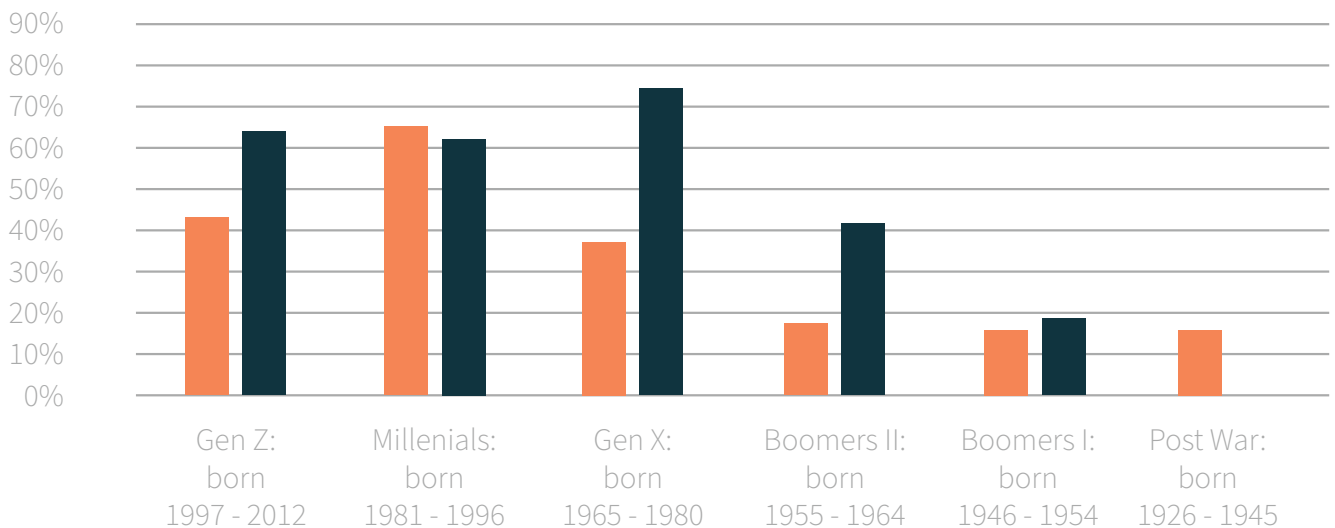


Even more interesting, 67% of millennials in the US are more likely to watch sports commentary if a virtual studio is part of the production, vs 52% of all respondents. This shows the importance of virtual elements for engaging Gen X, the current biggest demographic of millennials, as well as the upcoming Gen Z in both markets.

Virtual Sets in Sports Broadcast



US Generations vs UK Generations on if Virtual Studios Add to Sports Commentary



It's plain to see, then, that the dominant aspects of visual production in sports – both in terms of graphics and virtual set elements – are highly valued by Gen Z and millennials and make a huge difference to the level of engagement with sports content.



This conclusion is further underlined when we look at all respondents, with graphics and virtual elements adding significantly to their viewing experiences and driving broadcaster loyalty.

GRAPHICS AND VIRTUAL ELEMENTS MAKES ME FEEL MORE
IMMERSED AND INTERESTED IN THE SPORTS CONTENT
WHEN WATCHING FROM HOME, ON THE GO, OR IN THE PUB

62%

GRAPHICS AND VIRTUAL ELEMENTS MAKES ME WATCH
SPORTS FOR LONGER

51%

GRAPHICS AND VIRTUAL ELEMENTS HELPS ME
UNDERSTAND THE GAME/MATCH BETTER

43%

GRAPHICS AND VIRTUAL ELEMENTS MAKES ME MORE
LIKELY TO WATCH THAT BROADCASTER FOR
FUTURE SPORTING EVENTS

23%

“

“There’s a drastic shift in how the younger demographic is interacting with, and consuming sports content. To truly keep these fans engaged, broadcasters must adapt their content for the younger generation’s viewing habits. Millennials and Gen Z want shorter, snappier content they can watch on the go, but that is rich with AR graphics, real-time data, and exciting analysis to feel fully immersed in the game.”

Andrew O’Neil
Head of Sport EMEA & APAC
at Vizrt

APPEALING TO THE DIGITAL GENERATIONS IRL (IN REAL LIFE)

Some broadcasters and content creators have already been making a play to appeal to the younger demographics. To achieve this, many have been benefiting from Vizrt’s innovative, digitally-driven technology and expertise in delivering groundbreaking engagement projects.



GOING WHERE THE AUDIENCE IS: UEFA MAKES A STRONG PLAY IN SOCIAL MEDIA

In common with all sports organizations, UEFA has recognized the importance of producing impactful video content for social media, which is the epicenter of sports consumption and engagement for Gen Z. Recently, it became clear that a sports analysis solution which could accommodate powerful virtual elements was required to support a broader range of content.

UEFA is now creating clips and mini-articles using **Viz Libero**, Vizrt's sports analysis solution powered by Viz AI that combines 3D virtual enhancements with telestration tools. The software is packed with automated features such as default calibration, while recent AI innovations have accelerated previously time-consuming tasks, including the creation of 3D flights to show different perspectives and player cutouts.

"The feedback from fans has been incredible, and the numbers are off the scale in regards of views and interactions across various social media platforms. But we are not resting on our laurels; we will continue to improve with the support of technology partners like Vizrt," says Atle Rosseland, Team Leader and Supervisor Performance Analysis, UEFA.

More targeted short-form content has extended the lifespan and replay value of match information for UEFA, as well as providing new ways to monetize content via sponsorship deals. It has also reinforced UEFA's ability to evolve in line with the needs of its audience.

The UEFA performance analysis team is now gearing up to analyze the trends and tactics in the Women's Football Champions, futsal, and all their youth competitions for the summer.

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Atle Rosseland

*Team Leader and Supervisor
Performance Analysis
at UEFA*



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“3Play® turns what used to be a cumbersome 10-minute process into a super easy 10-second process. It even renders and streams the clips directly from its internal storage to online sites, such as our Twitter, Facebook, Instagram, and TikTok sites, as well as our website.”

Luke Winzar

*Collingwood’s Head of Digital
at Collingwood Football Club*

HOW AUSTRALIA’S COLLINGWOOD FOOTBALL CLUB RAPIDLY UPDATES FANS ON GAME ACTION

Nicknamed the “Magpies” or “Pies” for short, the Collingwood team competes in the Australian Football League (AFL), which comprises 18 teams across Australia. While the AFL works on behalf of its member teams to produce digital content for its respective social media outreach, Collingwood prefers to produce and manage its own content to ensure the timeliest and highest-quality video postings.

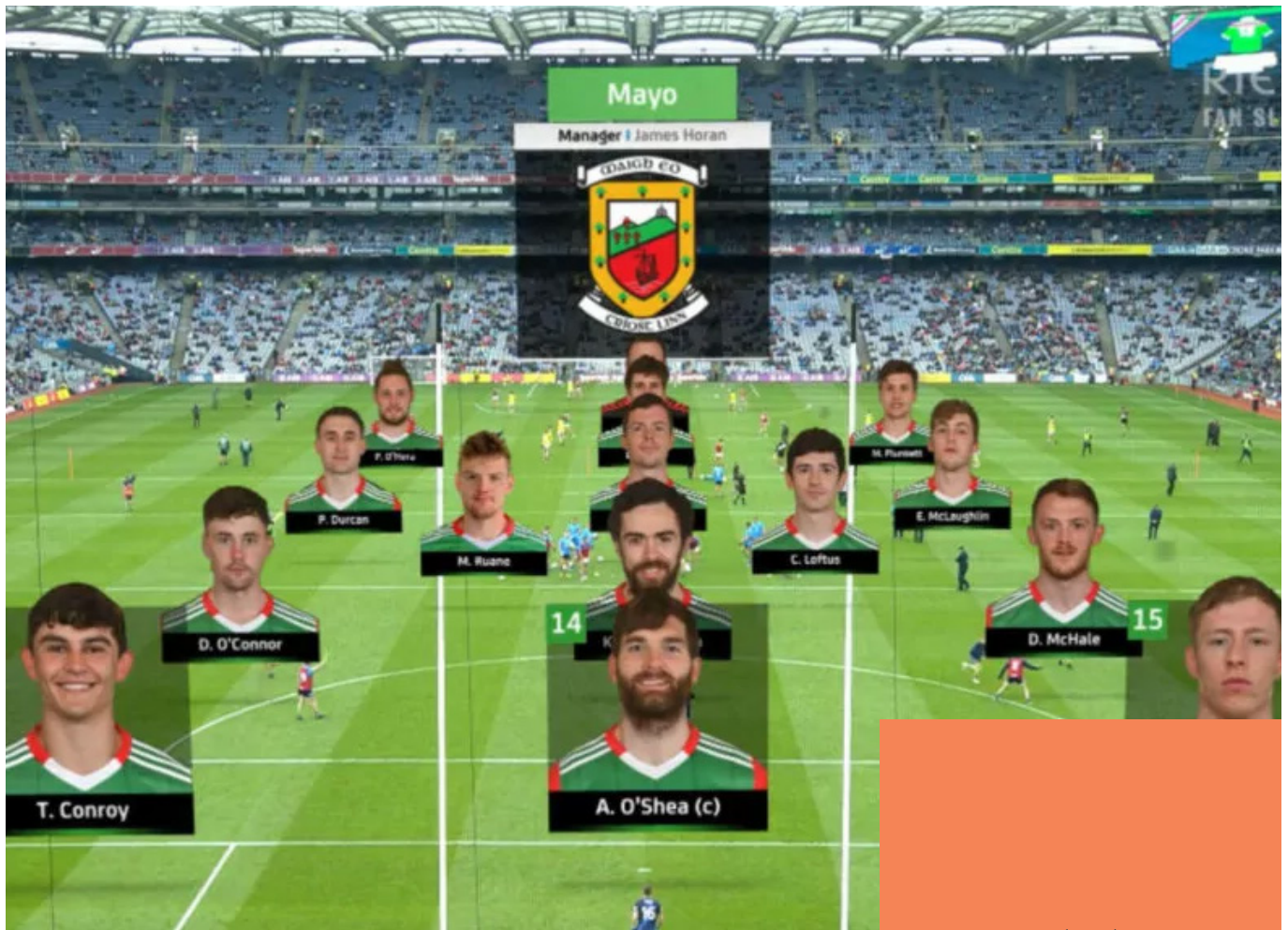
To do this, the club recently upgraded to a 3Play®. This turnkey video editing solution helps create branded highlight reels, instant replays, and other rapid-fire video clips and promos crafted to attract fans and generate excitement for high-profile sports and other live events.

“We’re often the first to release game highlights and replays and this is very important to our fans,” stated Collingwood’s Head of Digital Luke Winzar. The Collingwood fan base includes those who’ve paid for various subscription packages to become VIP members.

In its workflow, Collingwood instantly captures live TV broadcasts at the highest quality using a set top box hooked to a computer, and then brings those feeds into 3Play® to render out the desired clips.

“3Play® turns what used to be a cumbersome 10-minute process into a super easy 10-second process,” Winzar explained. “It even renders and streams the clips directly from its internal storage to online sites, such as our Twitter, Facebook, Instagram, and TikTok sites, as well as our website.”

By working in near-real-time, Collingwood is able to save a huge amount of money, time, and resources that pretty much pays for the system. The ability to take live broadcast feeds and turn them into highlights that go instantaneously to its social channels—while building fan loyalty—it vitally important in helping viewers better understand the game, and get closer to the action.



BRINGING THE GAA GAELIC GAMES ALIVE FOR RTÉ WITH AR GRAPHICS

Ireland's largest sport organization, the Gaelic Athletic Association (GAA), supports and promotes a huge range of traditional Irish sports including hurling, Gaelic football and Gaelic handball. It has a long history of partnership with Irish public service broadcaster RTÉ, and realized there was a need to enhance the visual elements of live sports coverage, including AR graphics, without adding significantly to the required resources.

The two graphics operators who traditionally work on RTÉ's Gaelic Games outside broadcasters are now using Viz Arena, which is Vizrt's market-leading image-based AR graphics and virtual advertising solution. Designed to keep fans engaged, sponsors satisfied, and costs low, **Viz Arena** enables quick calibration with multiple camera feeds – meaning that the broadcaster is able to present AR graphics from different angles within the stadium, adding to the immersive qualities of the coverage.

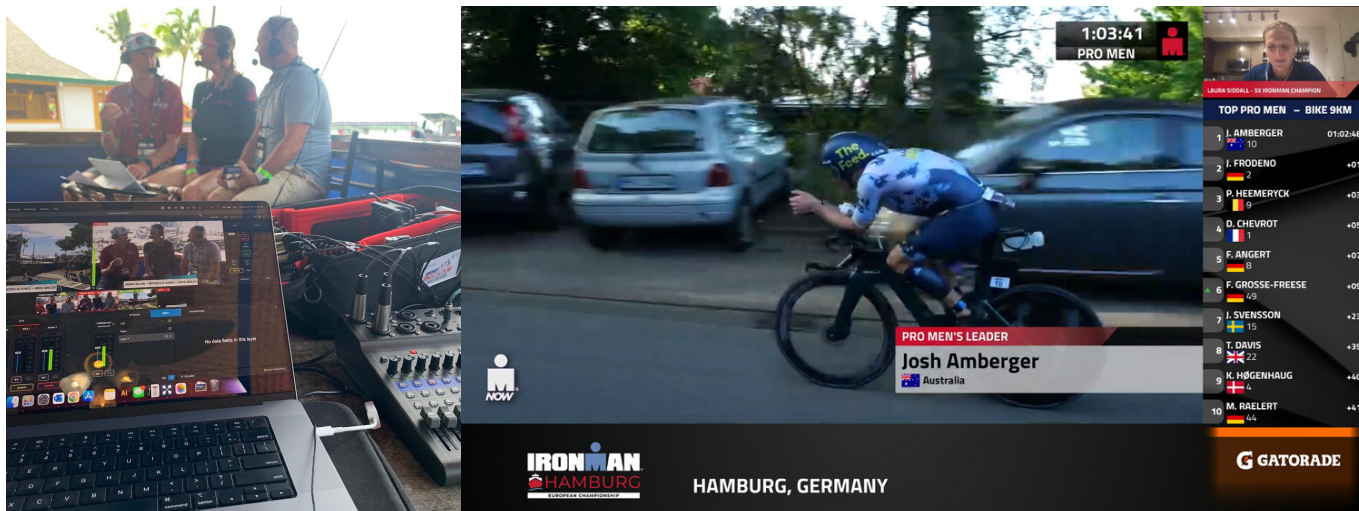
“The fact that it is a software-based solution is the best thing about Viz Arena. It was so easy to integrate with our existing systems, very easy to learn and very straightforward to use. Importantly, Viz Arena didn't add to RTÉ's costs of production or to the time and resources required for its match coverage and that was a huge win,” remarked Grace Dinan, design operations lead at RTÉ.

RTÉ was able to significantly add to its production value, and better engage its hundreds of thousands of viewers for the GAA of all ages, and really increase the experience of its sports fans by adding in real-time AR graphics via Viz Arena.

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Grace Dinan
Design Operations Lead
at RTÉ



BCC broadcasting in Hawai'i using cloud based technology to allow team back in Boulder, Colorado, USA to assist in the production.

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“However, let’s talk about the real invaluable feature of [Vizrt] – their tech support. This company should be the textbook example of how businesses should operate and help their customers. They have 24/7 support from real humans who are passionate about their product and are the ones who directly service it in the background.”

BCC Live

CUTTING-EDGE HTML5 GRAPHICS FOR DIGITAL BROADCASTING

BCC Live, a full service digital media company, uses **Viz Flowics**, our comprehensive cloud-native platform for remote and in-studio production of live graphics and interactive experiences in production, to achieve its digital broadcasts and drive engagement where its audiences are, online.

Viz Flowics’ helps BCC live collect and produce a ‘flow’ of data including comments from Facebook and YouTube, Tweets, photos from Instagram, usernames, handles, profile photos, and much more for a wide range of customers. Additionally, Viz Flowics includes the ability to operate a ‘mechanic,’ which notably integrates with Facebook’s native interaction features such as polling and questions where the user can select an option from a multiple-choice list to vote or answer a free-form question in the comment section.

Not only does this mechanic drive the engagement features on the Facebook platform itself but return the data back into the Viz Flowics system in the form of a flow with which you can drive graphics on the stream itself to show live results.

Recently, BCC and the Viz Flowics team collaborated to deliver content for ROUVY, an indoor cycling app which overlays GPS data with real-life video footage to create a mix of augmented reality of animated 3D riders with live videos.

Together, the teams created a custom API endpoint that integrated with live data from ROUVY that showed, in real-time, the biometric data produced by athletes competing on the ROUVY platform all over the world. This pushed to a data stream that was connected to Viz Flowics that included speed, cycling output power, pedaling cadence, distance, leaderboard, etc. This graphic integration is what made the whole concept of the show possible, and to bring the racing alive.

Fast forward to today when live racing is back in full swing. BCC has applied some of the same foundations with new and improved features of Viz Flowics to create a new custom API endpoint with RTRT, the world-leading endurance sport timing platform host for IRONMAN and Rock ‘n’ Roll Running Series timing data globally.

The RTRT data connector is a must for BCC to provide accurate, complex, and real-time results on-air of its broadcasts. Using this connection, they can drive content and graphic automation in real-time from data streams coming straight from the race timers on-site at the race and bring audiences closer to the action, while driving better engagement.



RETHINKING THE PLAYBOOK FOR VIEWER ENGAGEMENT

As the research reveals, a monumental shift is now taking place in how sports fans consume content. Underpinned by a move from traditional to digital delivery, with a simultaneous emphasis on social media channels, younger viewers clearly want more from their viewing experiences. So, for broadcasters and media organizations to connect, engage, and retain a younger audience demographic, it is essential to rethink the playbook.

However, this is a development that actually transcends Gen Z and millennials. Regardless of demographic, consumers and sports fans agree that graphics and virtual elements help them feel more immersed and interested in sports content, watch for longer, understand the game better, and be more likely to watch that broadcaster in the future.

Embracing interactive features and immersive experiences actively involves the audience, fostering a deeper connection and enhancing viewer engagement, which is especially true for younger audiences. As a result, the leverage of technologies such as AR, virtual studios, sports analysis with replay, and interactive social media elements can enable unique and compelling experiences that help viewers to connect to content in a more meaningful and enduring way.

Broadcasters who take steps now to incorporate at least some of these elements will be well-placed to compete in the evermore intense 'battle for eyeballs'. As well as building the foundation for long-term viewer engagement across demographics, cultivating a devoted and loyal fan-base to ensure they not only survive, but thrive for years to come.

Learn more at vizrt.com



**WANT TO UP YOUR
PRODUCTION
GAME FOR YOUR
SPORTS FANS?**

*Speak with our team of
experts today:*

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