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The Beginning of the Immersive Sports Era

Recent technological advancements to the sports viewing experience have led sports teams, leagues, broadcasters and streamers to re-evaluate the best way to capture fan interest.

For example, MLB's Gameday 3D gives fans the ability to watch replays from any angle, while the YES Network became the first to offer single-screen interactive stats, making a second device unnecessary. These types of advances provide the immersive experience those from younger demographics crave.

To better understand how fandom has changed, Deloitte* surveyed 3,000-plus fans, ages 14-plus, and revealed the results in "2023 Sports Fan Insights: The Beginning of the Immersive Sports Era."

Deloitte identified six key fanhood insights. The first three are the focus of this article — (1) Gen Z fans crave a social sports experience, (2) fans want streaming video on demand (SVOD) features that enhance, but don't overshadow the game and (3) fans are crafting their own perfect experience at home.

Join the SBJ Live conversation on September 13th at 12:30pm ET!
The Immersed Fan: Providing Unified and Personalized Experiences

Creating a More Social Experience

Many Millennial (27-40) and Gen Z (14-26) fans want an immersive, customized, personalized sports viewing experience. This means fans who are watching the same sporting event may not have the same experience. For Gen Z fans, socialization and connection are key to their budding fandom.

Increasing engagement with this young cohort could be as simple as placing a social feed on the screen, allowing fans to interact online while

watching the game.

Additionally, virtual rooms could be created where a curated group of friends and family watch the game “together.” This is like the online video game experience where “you’re seeing people and their reactions and talking to each other as you’re playing the game,” said Kat Harwood, Principal of Deloitte’s Sports Industry Practice, Deloitte Consulting LLP. “It’s an immersive and social experience we haven’t fully adopted for watching live sports.”

To tap into social experiences, teams and leagues may want to capitalize on their athletes’ star power and social media followings to attract younger fans, as 80% of Gen Z fans follow professional athletes online.

“Teams and leagues should give athletes a platform and help them create a direct-to-fan channel,” said Harwood. “Many athletes could benefit from more resources to build their own personal brands. The teams would also benefit from the connections the athletes are making.”

Streaming Video Features

Millennials and Gen Z fans are more likely than those in previous generations to watch sports on streaming video services. They say they get a better, more interactive and personalized viewing experience than they would from cable or broadcast TV. Among the features they may want while watching sports on SVOD services are real-time stats and analytics, different camera angles and the ability to watch the game from an athlete’s point of view.

However, some of these technological advances pose a challenge to fans who want to solely focus on watching the game. “This can be solved through the use of alternative broadcasts that appeal to specific demographics,” said Harwood. “Already, there are broadcasts aimed toward kids and others with former players as commentators. You need to find the right denominator when segmenting fans and determine how many alternative broadcasts to use.”

Crafting the Perfect At-Home Experience

With most sports fans watching live events at home – and with more competition coming to the market – streamers are challenged with creating the best possible at-home viewing experience for consumers.

But these additional features, such as the ones previously mentioned, come with a new set of problems.

“If streamers want to use real-time data, they need to work to overcome latency (delay) between the data sources and service providers,” said Adam Deutsch, Managing Director of Deloitte Digital, Deloitte Consulting LLP. “There’s typically a seven-second delay. This can be managed if the content doesn’t need to be exact to the second. For example, in football, it could reference the drive instead of the next play.”

Solving this problem will take a joint effort between the broadcaster, league and data supplier, but that may not be enough.

“There’s no guarantee that equates to making the broadcast more relevant to a younger audience,” said Deutsch. “What we’re trying to solve for is making fans more passionate. Broadcaster technology can make the game feel more modern and comport with the devices and digital behavior the younger generations have.”

Solving for Fragmentation

As more companies acquire broadcasting rights, the live sports market has become fragmented, making it more difficult for fans to find the events they want to watch.

“There should be a wayfinding system,” said Deutsch, “something like a ‘TV Guide’ of sport. It could behoove the sports industry to have an easy place where fans can find which platform has their event.”

Fragmentation has also created a monetization issue, with fans needing to subscribe to a multitude of services to watch their favorite events. This has caused 80% of Millennials to say they would pay extra for a streaming service that had all the sports events they want to watch in one place.

“Like any economic decision, there’s probably a saturation point with fans needing to decide which platforms they’ll subscribe to and which they’re willing to sacrifice,” said Deutsch.

A fragmented market that requires multiple subscriptions could make it

more challenging for sports properties to develop new fans. But, as Harwood said, casual fans could be developed from individual platforms.

“Streaming providers offer other content beyond live sports events,” said Harwood. “People may subscribe for the provider’s other entertainment or news content and casually stumble upon sports in the same way they’ve done in the past.”

“Many big, marquee events are either on free broadcast TV or on networks with massive distribution,” said Deutsch. “Properties could ungate some events. It’s like a free trial and a way to get people hooked to the sport. But, at some point, the free trial concludes and viewers must pay to watch.”

When sports properties and streamers understand the immersive trends Millennial and Gen Z fans want in their sports viewing experience, they can work together to take advantage of technology innovations to create new ways for fans to consume and engage with live sports from home.

*Please see www.deloitte.com/us/about for a detailed description of their legal structure.