

Sports Content

Players Turn Up the Volume on Social Conversation, and Fans are Noticing

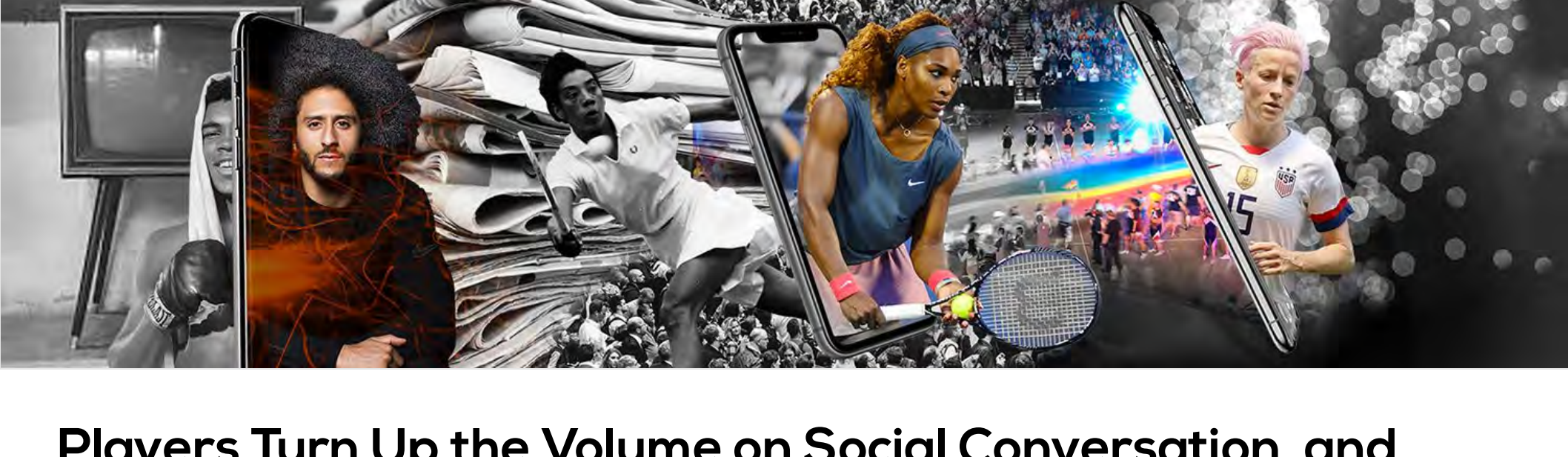
Leveling Up: Leveraging Gamers as Brand Advocates

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Athletes Unmasked: Reaching Fans Beyond the Stands

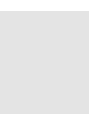
The Betting Invasion: Caveat Emptor



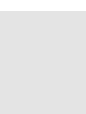
Players Turn Up the Volume on Social Conversation, and Fans are Noticing

by Jameela F. Dallis, PhD

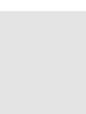
July 29, 2019



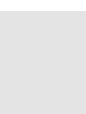
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THREE'S THREE:

- 1 Data reveals a strong correlation between age and fan expectations for athlete activism. Younger fans want athletes to play prominent roles in social conversation.
- 2 Overall, more than older fans, younger fans desire affinity with, and relatability to, players.
- 3 Younger fans take note when brands share their values, and they're willing to pay more for value alignment.

Activist athletes aren't new to the landscape—from the beginning of the twentieth century alone there are dozens of athletes, coaches, and team owners who've made headlines for their stances on social issues.

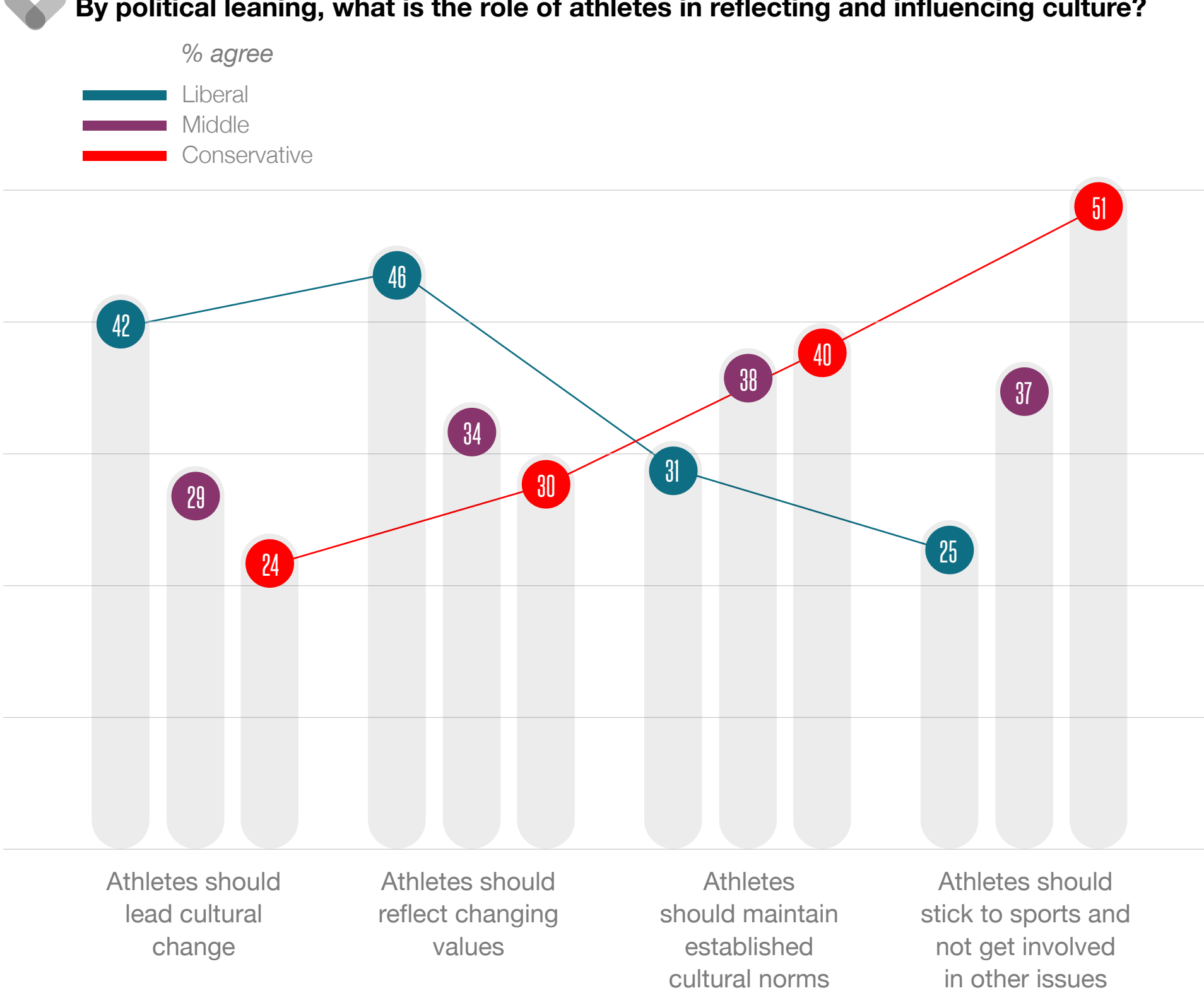
- Take Muhammad Ali who had **“no quarrel with them Viet Cong,”** or Colin Kaepernick who protested police brutality by taking a knee.
- **“Born too soon”** Althea Gibson felt the weighty responsibility of race, and paved the way for Serena Williams—who is bold and comfortable with her greatness.
- And, now, young LGBTQIA fans see themselves in athletes like Megan Rapinoe who declares, **“We already discussed this. Science is science. Gays rule”**—a stark contrast to a young Gay Games founder Tom Waddell who often felt he was the **“only homosexual in the world.”**

So, while outspoken athletes aren't new phenomena, what is remarkable is the accessibility and increased interaction social media gives players and their fans. Brands, teams, and players must understand social conversation's impact on fan identities.

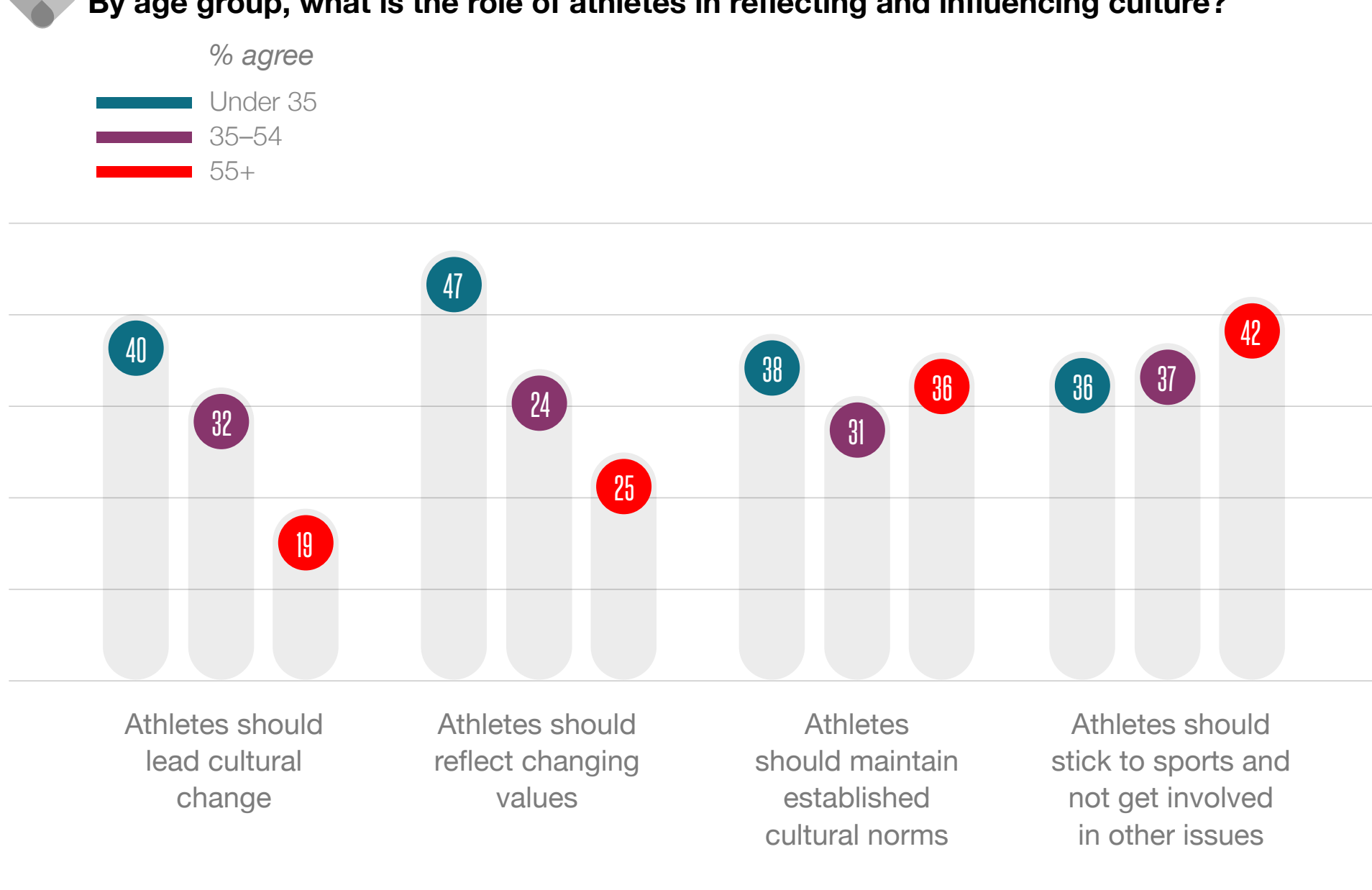
Fan Expectations

We asked US fans about their expectations for athletes and their influence on, and interaction with, culture and society. **We need to understand the ways social conversation drives or diminishes engagement with sports.**

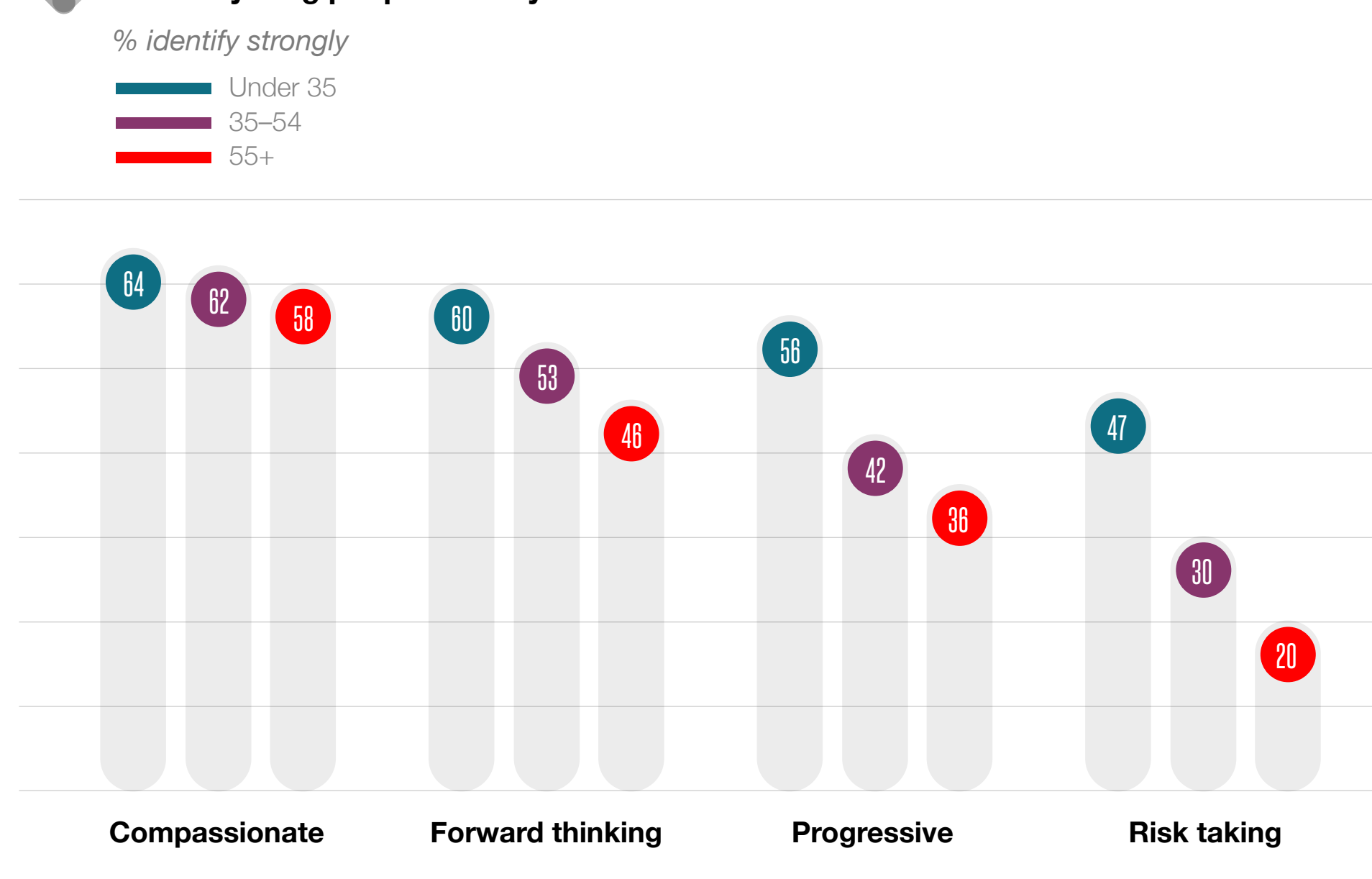
Predictably, our data reveals a strong correlation between fan expectations around athlete activism and their political leaning.



We see this pattern across age as well, as younger fans want players to lead or, at the very least reflect, cultural change, while older fans prefer that players stick to sports.

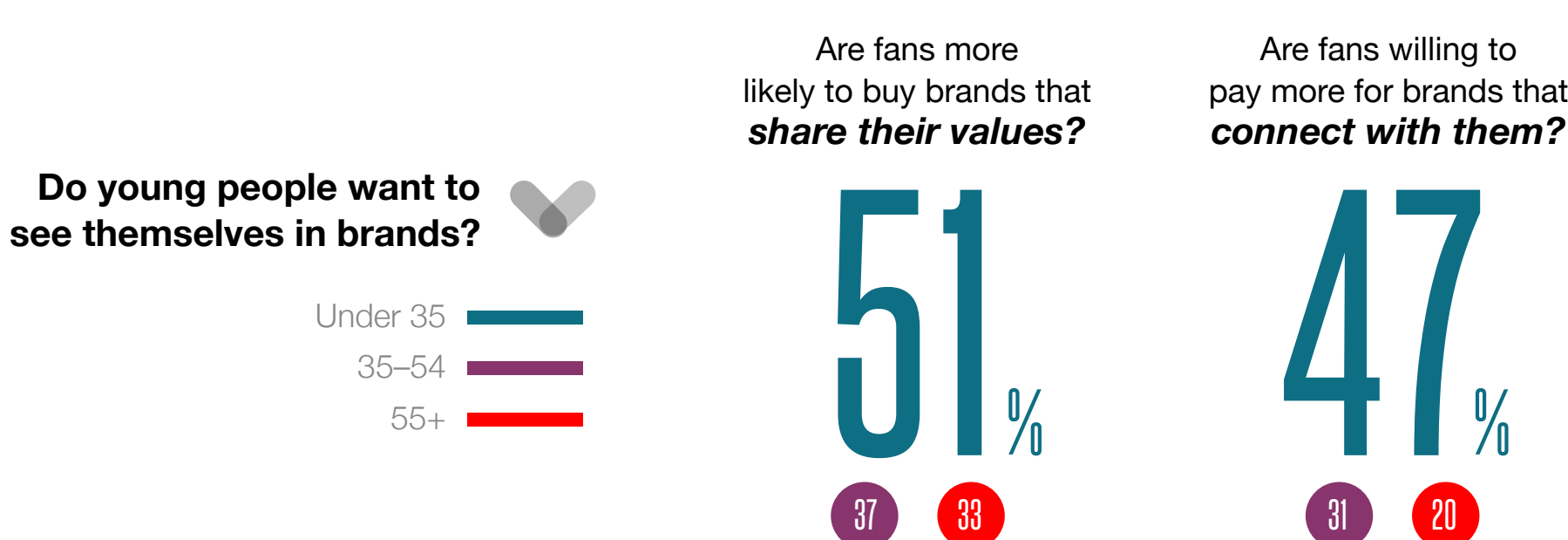


Further, many young fans are more likely to describe themselves as forward thinking, progressive, and risk taking.



Fans Want Value Alignment

As athletes, teams, and brands consider participating in social conversation, they should acknowledge fan desire for value alignment. Younger fans want an authentic connection with brands, and shared values influence purchasing behavior.



One industry leader prioritizing player and fan experiences is incoming WNBA Commissioner Cathy Engelbert. She sees value in leveraging social conversation that's already a part of players' daily lives.

“ Obviously, these women playing in the WNBA, college graduates, they're smart, they have social voices, they are community-oriented millennials, [and] digital natives . . . so it is a moment where I think the WNBA players and the league itself can really step up and really take a leadership role around not just women's sports but sports and actually, the conversation socially as well.



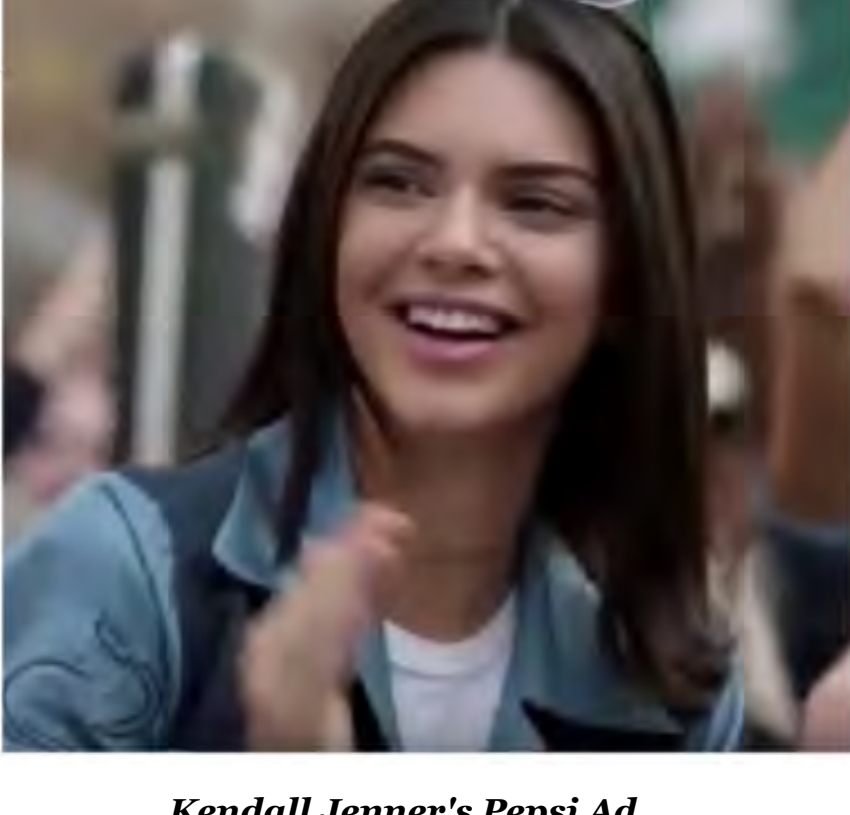
But, with the power social conversation holds to both connect and divide, brands must be sensitive, **because capitalizing on trending social issues without recognizing nuance can be devastating.**

Leveraging hot-button issues must be a calculated risk.

When done right, it can galvanize a cause. When done wrong, it can alienate a base.



Colin Kaepernick's Emmy-nominated Nike Ad

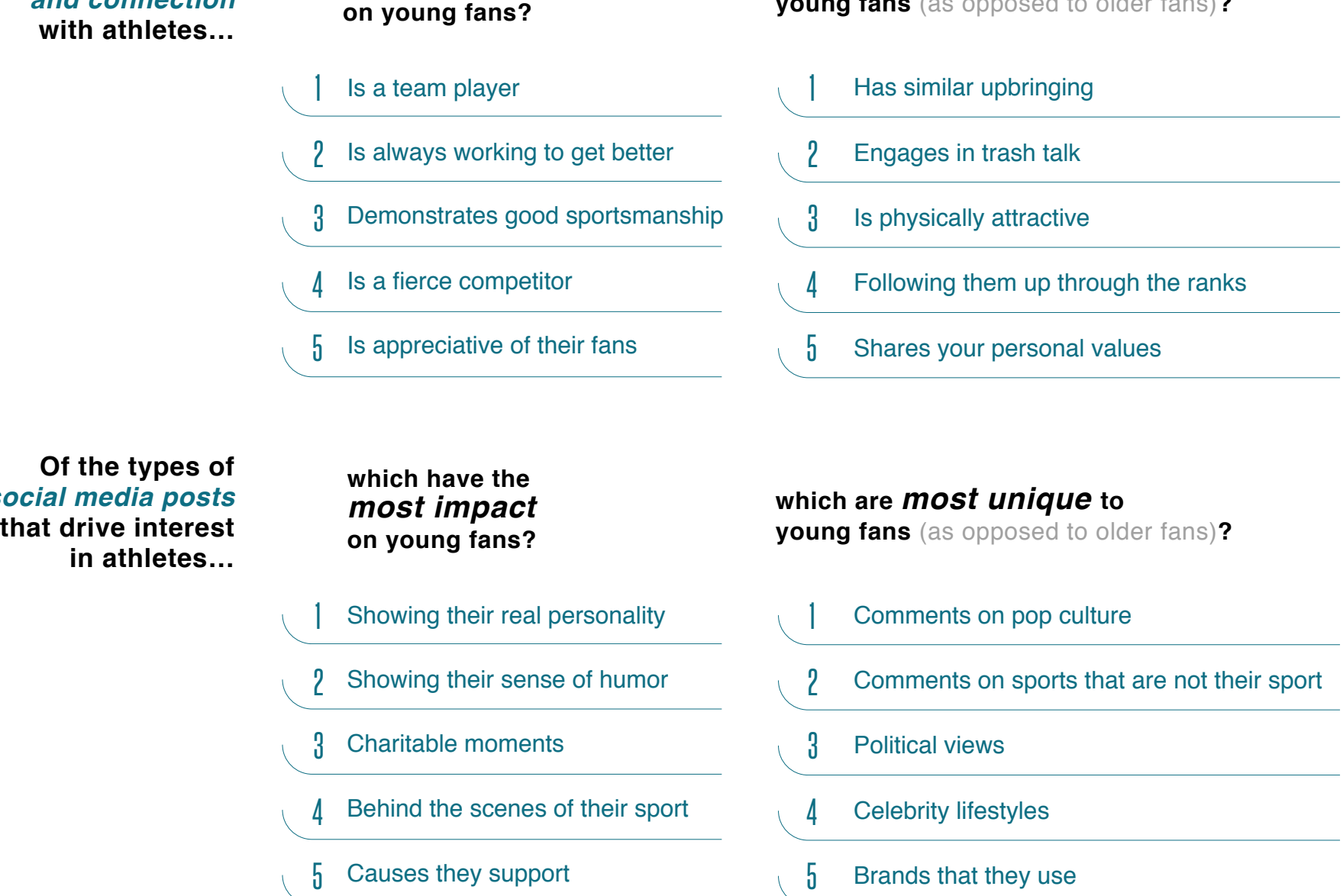


Kendall Jenner's Pepsi Ad

Leveraging Social Conversation

On the court or field, young fans want the consummate player they aspire to emulate, but, at the same time, these **fans prefer when players use social media to show they're just like the rest of us**—from commenting on the latest trends and celebrity news to sharing their opinions about political candidates.

There are many things fans agree on, but if younger fans make up your target audience, keep their preferences in mind.





Leveling Up: Leveraging Gamers as Brand Advocates

by Jameela F. Dallis, PhD

August 1, 2019

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THREE'S THREE:

- 1 Sports fans who play sports video games are some of the most immersed in sports of fans overall.
- 2 Brands reflect fans' achievements—and fans share brand loyalty with other fans.
- 3 Risk-taking, opportunistic, and innovative—gaming fans give brands an incubation space to bring new offerings to market.

Attention is currency and sport leagues vie to keep their fans engaged across platforms in a market where even Netflix finds an unlikely rival in Fortnite. Conventional wisdom suggests video games siphon valuable time from players' daily lives, but, on the contrary, *when it comes to sports fans, THREE finds that sports video games complement the fan experience.*

For many fans, *sports video games make up a significant part of their fandom and playing games like EA's FIFA increase their interest in sports overall.* We find that nearly one-quarter of US sports fans agree that video games are an important part of their fan experience, and two-thirds of those fans say sports games amplify their overall interest in sports.

SPORTS FANS

1 in 4 SAY PLAYING SPORT VIDEO GAMES IS IMPORTANT TO THEIR SPORT FAN EXPERIENCE

SPORT VIDEO GAMERS

2 in 3 SAY PLAYING SPORT VIDEO GAMES INCREASES THEIR INTEREST IN THE SPORT ITSELF

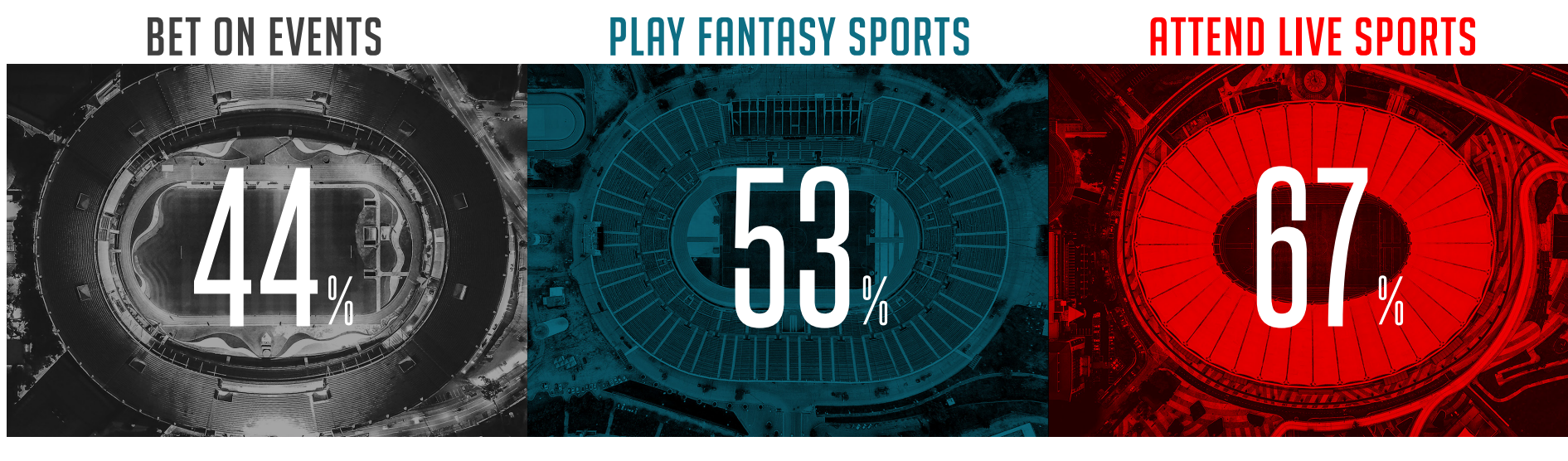
Video Games Offer More Sports Immersion

In general, fans turn to these games because they crave more immersion into the sports they love. In addition to video games, over half of gamers participate in fantasy leagues, they are much more likely to bet on sporting events, and attending live events are more important to them than the average fan.

THREE's own avid Tottenham fan, Sam Schenkman, 29, played youth and college intramural soccer. He says playing FIFA has helped him "figure out what [he is] supposed to do based on where the other players are on the field—it's [helped him] understand the game better."

Similarly, Mario Sanders, 26, says, "[FIFA] led me to start exploring the sport in other facets. Until playing the game in 2011, I rarely watched soccer and had only played as a 3-year-old."

Gamers seek out immersive experiences that strengthen their connection to sports
Gamers rate higher than non-gamers on the following:



The Sports Gamer, Brands, and Identity

The video game industry is paying attention to and capitalizing on the inherent community-building and revenue-driving potential sports have. It is clear that professional sports leagues are invested in this reciprocal relationship—recall NBA commissioner Adam Silver's statement that NBA 2K is the NBA's "fourth league."

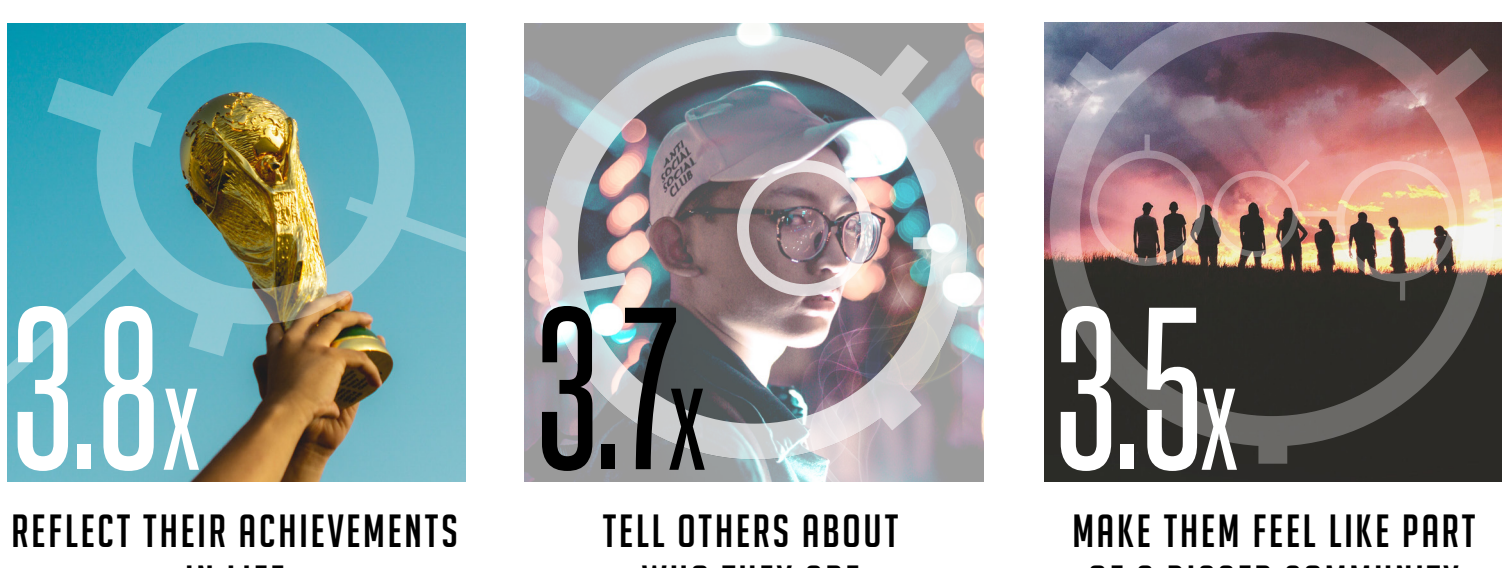


“Of course we have the NBA, the WNBA and the [NBA] G League, and now this is the fourth league in our family, and that’s exactly as we’re treating it: one more professional league.”

Adam Silver, NBA Commissioner

More notable for brands, *these fans are twice as receptive to advertising than non-gaming fans.* They are vocal about the brands they wear, subscribe to, and with which they interact. *Brands become extensions of their identities—essentially dynamic, expressive forms that reflect their motivation to achieve and belong.*

Gamers respond positively to brands that enhance their persona
Gamers are much more likely than non-gamers to say that brands they purchase...



Because *video games* help fans immerse themselves more completely into all aspects of a given sport, they *provide fertile ground for brand expansion and adaptation.* However, for brands to capitalize on gamers' enthusiasm and insatiable thirst for sports, it is critical that brands meet fans on their home turf.

Connection Drives Fans to Brands

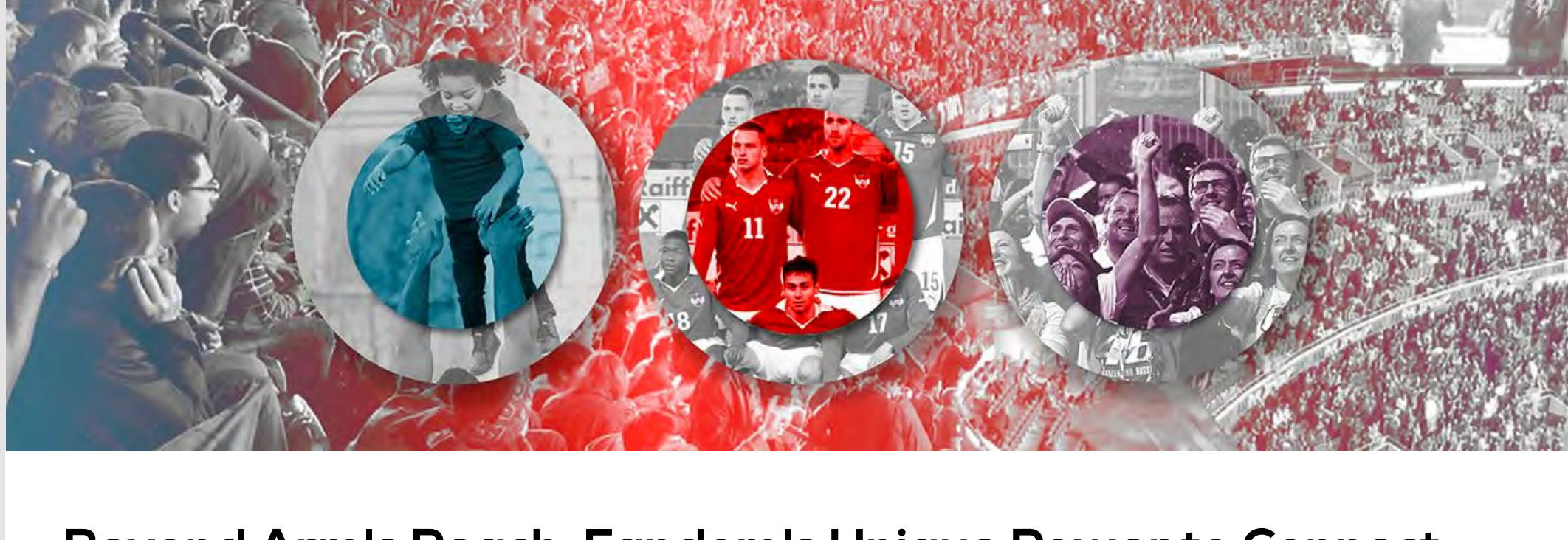
Adam Swain, Principal of Sport at THREE notes,

What's interesting is that we're looking at the data and we're seeing something unique to those fans who play video games—they're risk takers, they're opportunistic, innovative, and even adventurous. And, honestly? I immediately think of Red Bull. It's no surprise that they've been in the vanguard when it comes to action sports, motorsports, and even esports. I think they, better than any other brand, have built a genuine connection with this audience—and it began with a deep understanding of who that audience was.

Gamers indentify as more open to new experiences



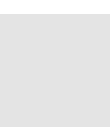
For those willing to make the investment, sports fan gamers are prime targets for developing brand advocates. The intersection of sports and video games gives brands an incubation space for testing new and innovative offerings. Gamer fans are always on the lookout for the next thing—the thing that will reflect who they are and symbolize their membership in a broader community. *Brands wanting to drive innovation, or embrace a growth mindset, can find willing partners in this fanbase, but only after developing an authentic relationship with them.*



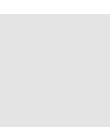
Beyond Arm's Reach: Fandom's Unique Power to Connect

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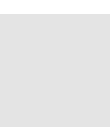
August 6, 2019



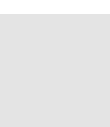
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THREE'S THREE:

- 1 Fandom is inherently social. Shared love for the game—even in the face of conflicting team loyalties—sparks opportunities for connection.
- 2 Value alignment, community involvement, and many other factors strengthen connections between fans, teams, and athletes.
- 3 Technology makes every fan-to-fan interaction an opportunity to amplify a brand's voice. Relevant brands accentuate connection.

Through face-to-face interactions, social media, and the clothes people wear, sports strengthen existing bonds and foster new relationships. Friends, family members, strangers, and athletes comprise the complex global networks sports create.

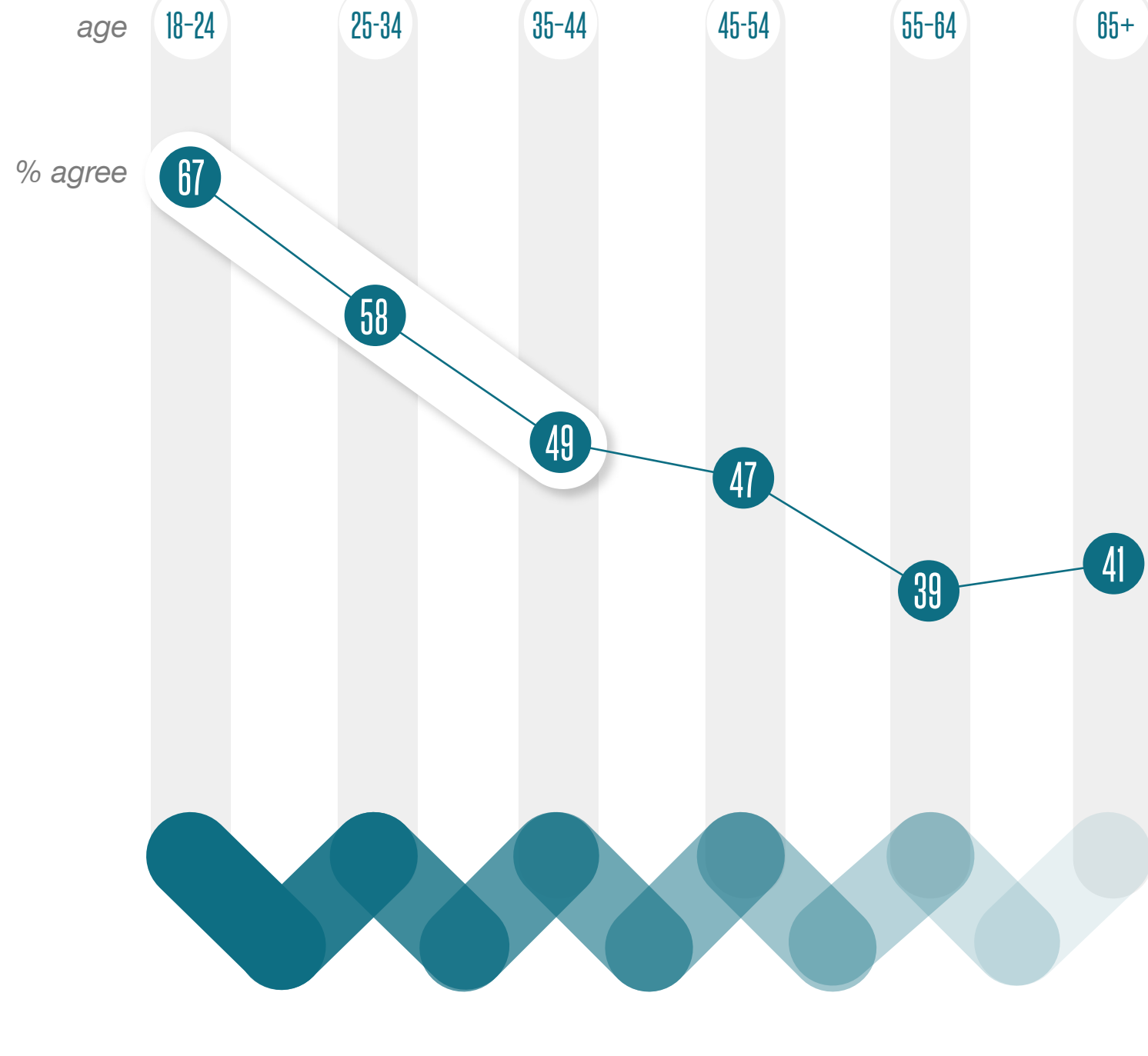
What unites us is more powerful than what divides us. Through sports, we find immediate connection and shared history with people who cheer for the teams we love. In rivalries, we find common ground through shared passion. In bars, barbershops, and water coolers around the world, our shared love of the game fuels genuine connection.

CONNECTION WITH FAMILY AND FRIENDS



Though the role of connection in fandom dissipates as families age, sports are vital vehicles for connecting with people closest to us—even those who are far away.

From ages 18–44, we see the steepest decline in those saying **fandom strengthens relationships**



Fans see sports as means of connecting with family members—especially their children

53%

*of those who did not choose "not applicable"

THEIR CHILDREN *

49%

THEIR PARTNER OR SPOUSE *

46%

FAMILY AND FRIENDS OLDER THAN THEM *

41%

FAMILY AND FRIENDS YOUNGER THAN THEM *

Fans extend their experience by connecting with others in person and online

61%

WATCHING SPORTING EVENTS WITH OTHERS

49%

TALKING WITH FRIENDS OR COWORKERS ABOUT SPORTS

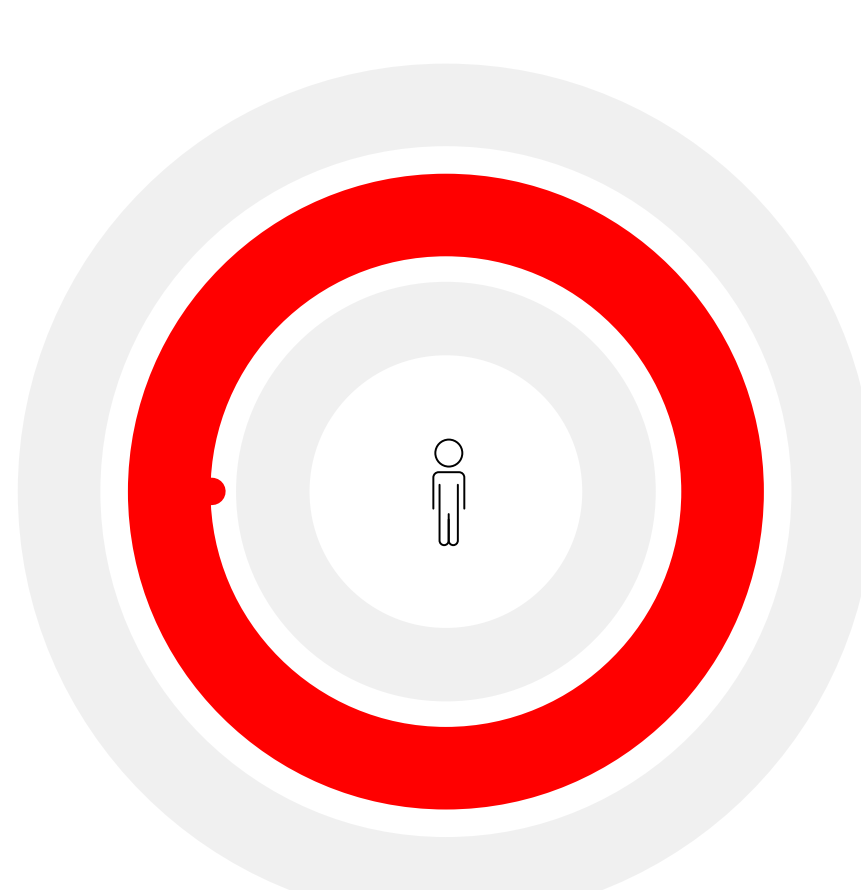
47%

WEARING APPAREL

32%

POSTING TO SOCIAL MEDIA ABOUT ATHLETES, TEAMS, AND SPORTS

CONNECTION WITH COMMUNITY



Fandom connects us to larger communities. Shared love for the game brings strangers into shared moments, neighbors into conversation, and rivals together.

Fans feel that sports create **instant connections** between strangers, and use sports to **broaden their social circle**

57%

53%

...of fans feel that shared fandom **creates instant connections** between strangers

...of fans say that shared fandom brings people together who **would not connect otherwise**

Fans **wear apparel** to facilitate connections with strangers and build community

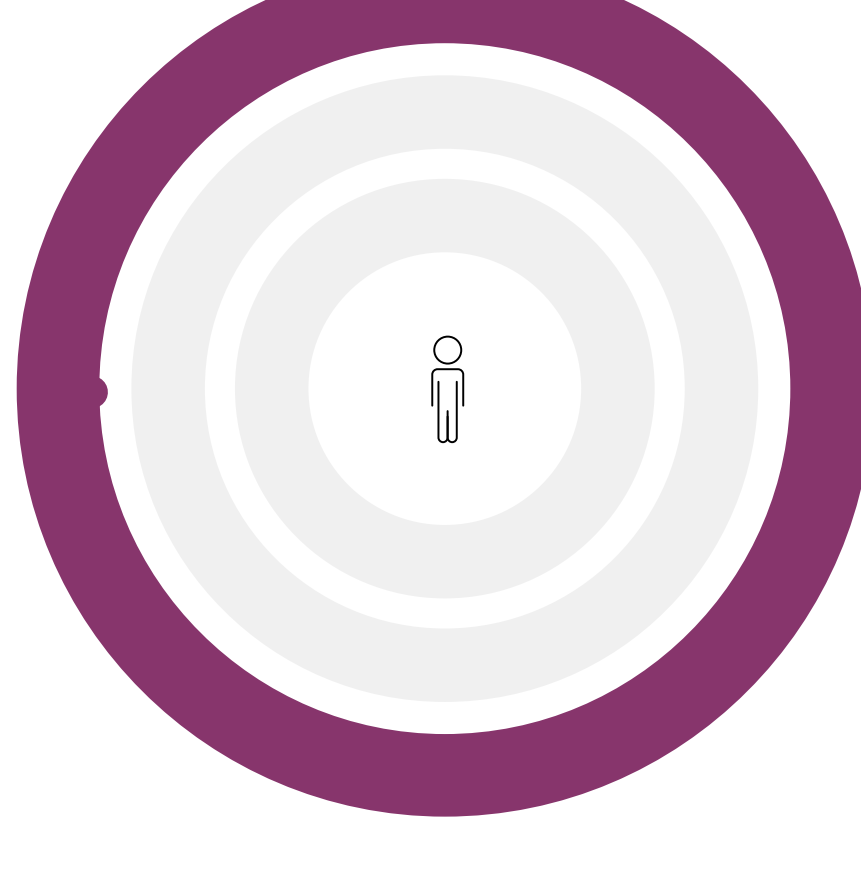
64%

56%

...of these fans wear apparel as a means to **show off their fandom**

...of these fans wear apparel to **connect with other fans**

CONNECTION WITH ATHLETES, TEAMS, AND SPORTS



Fans seek a reciprocal relationship between themselves and their heroes. Leagues, players, and teams should recognize that local relevance matters when it comes to fandom.

Fans feel more connected to teams that **do good in the community**, as well as teams from a city or country with which fans are connected

63%

60%

...of fans feel more connected to a team **doing good things in the community**

...of fans feel more connected to a team from a **city or country** with which they have a connection

Fans also want athletes to share their **personal values** and reflect the values of their community

58%

52%

...of fans are more interested in and connected to athletes who **share the values of their community**

...are more interested in and connected to athletes who **share their personal values**



When Pierre de Coubertin revived the modern Olympic Games over 100 years ago, his idea that sport could bring people together in an age of nationalism was viewed by many as optimistic. But as the Olympic Games can still bring together rivals and enemies in 2018, his once-mocked concept continues to be compelling.

Thomas Bach, International Olympic Committee President

Sports bring families, friends, communities, athletes, and teams together to share communal experiences. But the transformative potential of sports does not end there. Sports can ameliorate decades-long tension between rivals. If only for a short time, the significance is still remarkable.

De Coubertin's foresight is compelling. And when we consider that technology now makes every fan-to-fan interaction an opportunity to amplify a brand's voice, the potential for connection and growth are exponential.

The scale is simultaneously personal, local, and global. Relevant brands will deliver hyper-customized experiences that reinforce what makes sports special in the first place. Brands can still capitalize on the enduring energy of Mean Joe Greene tossing his jersey to a young fan and having a Coke and potentially inspire people around the world to become viral brand ambassadors.



Culture: It's Not Just for the Workplace Anymore

by Jameela F. Dallis, PhD

August 8, 2019

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THREE'S THREE:

- 1

Culture is the most important driver of team engagement.
- 2

Culture is the most persistent driver across age groups.
- 3

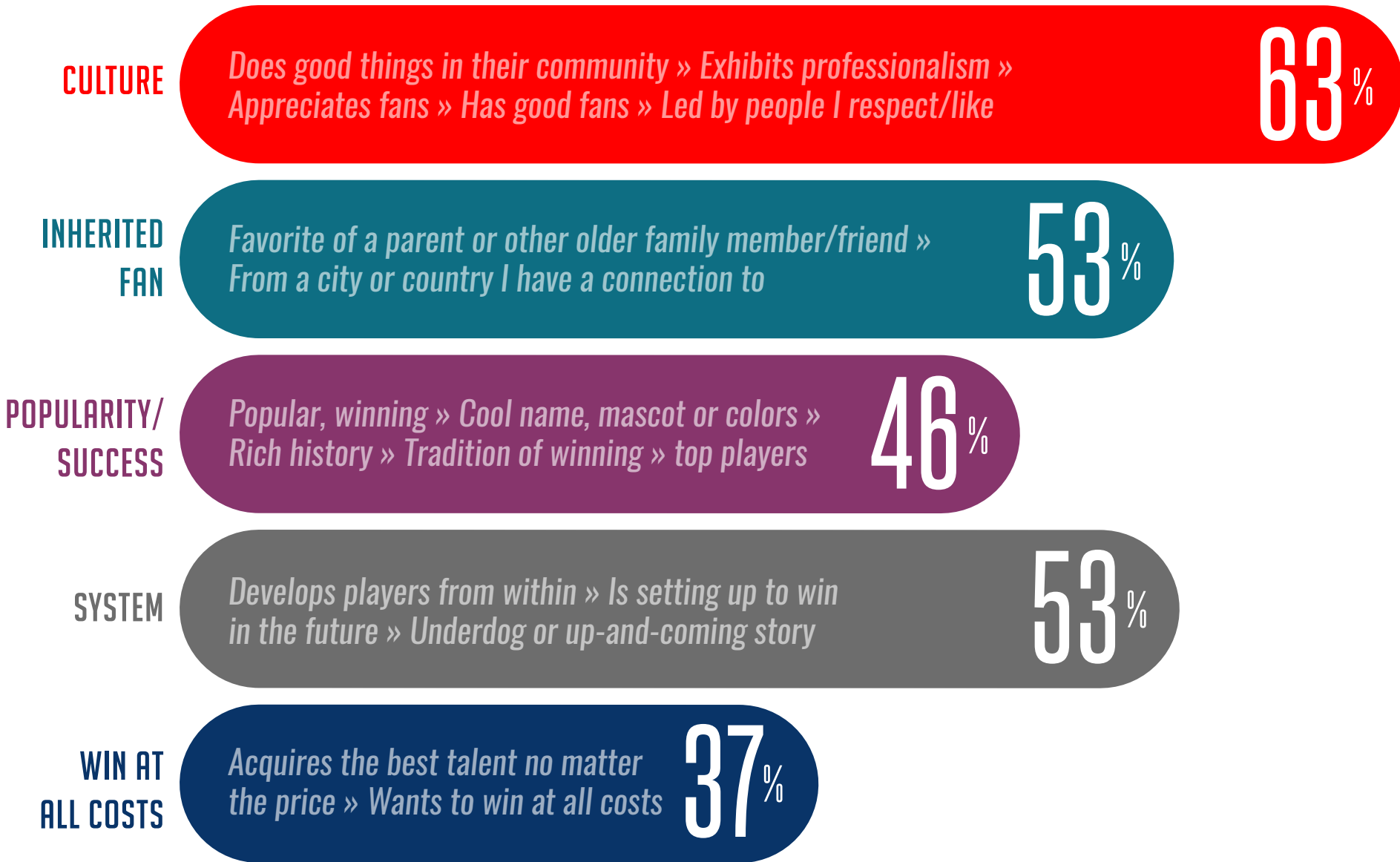
Team culture creates a halo effect for associated brands and sponsors.

Culture matters. From accepting a job offer to choosing a sport team, we want to know we're becoming a part of a culture fueled by mutual respect and appreciation.

We think and talk about workplace culture a lot. The number of Google results for workplace culture alone are at 7.9 billion and rising. It's simple—in positive, affirming environments, we thrive. We're also more productive.

THREE asked US fans about what impacts their connection with a team. **While fandom is multifaceted, we find the most important underlying factor that impacts fans when choosing and remaining loyal to a team is a team's culture.**

♥ CULTURE IS THE TOP DRIVER OF FANDOM.



Great culture leads to sustained success. Take the New Zealand All Blacks, for example. Gilbert Enoka, All Blacks manager, discusses team culture and legacy:

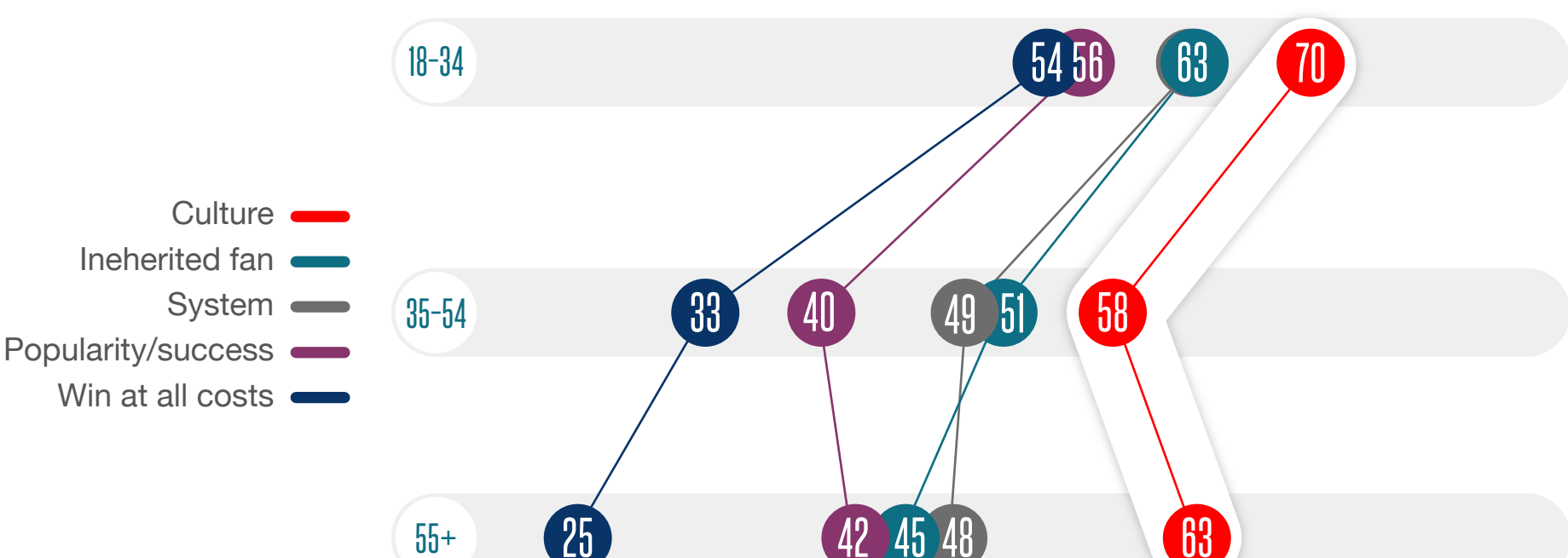


“As an All Black, you understand the team powers above the individual and you are part of a wider legacy, which has been passed down to you from the ages. In this particular period, it is your time and it is your moment. We want people to cherish and understand that and nourish it for the next generation, leaving it in a better place than it was.”

Gilbert Enoka, NZ All Blacks Manager

For fans, the significance of team culture is enduring and the most important factor for all ages. Knowing that a beloved team exhibits relatability, professionalism, community stewardship, and fan appreciation is paramount for the majority of fans, no matter their age.

♥ THE IMPORTANCE OF CULTURE IS ENDURING. IT DOES NOT DECLINE AS PEOPLE AGE.



To build enduring relationships with employees, shareholders, and customers, companies must invest in organizational culture. Tony Hsieh, Zappos Founder, understands and implements this concept well:



“Our number one priority is company culture. Our whole belief is that if you get the culture right, most of the other stuff like delivering great customer service or building a long-term enduring brand will just happen naturally on its own.”

Tony Hsieh, Zappos Founder

THOSE WHO EMPHASIZE CULTURE IN TEAMS ARE **3.9x** more likely to follow through on promotions when the brand is a **GOOD CULTURAL FIT FOR THE SPORT, TEAM, OR ATHLETE**

Just as CEOs invest in their organizational culture, so, too, must teams.

Creating a fan-friendly culture isn't only important for building loyalty—it can affect top-line revenue for teams and their sponsors. When fans connect with teams because of culture, they're much more likely to follow through on promotions and adopt brands that comprise a shared cultural ecosystem.

Culture is about people: people in the front office, people on the field, people in the stands. They play different roles but are connected through a culture into which they've built and adopted together.

“Seeing athletes and teams that I support help others, work hard, and appreciate the game, win or lose, [and some] of my favorite parts of being a fan.”

Fan, Survey Respondent

Culture is about process and partnership built over time. Culture isn't a promotion. Bringing in new sponsorship and brand partners can shift the cultural dynamic for better, worse, or both. Strong cultural alignment can solidify base identity, while poor alignment can violate unspoken promises existing within the dynamic and create distance between fans and the team. Yet, such changes are necessary so a culture remains fresh and relevant in an ever-changing landscape.



Athletes Unmasked: Reaching Fans Beyond the Stands

by Jameela F. Dallis, PhD

August 12, 2019

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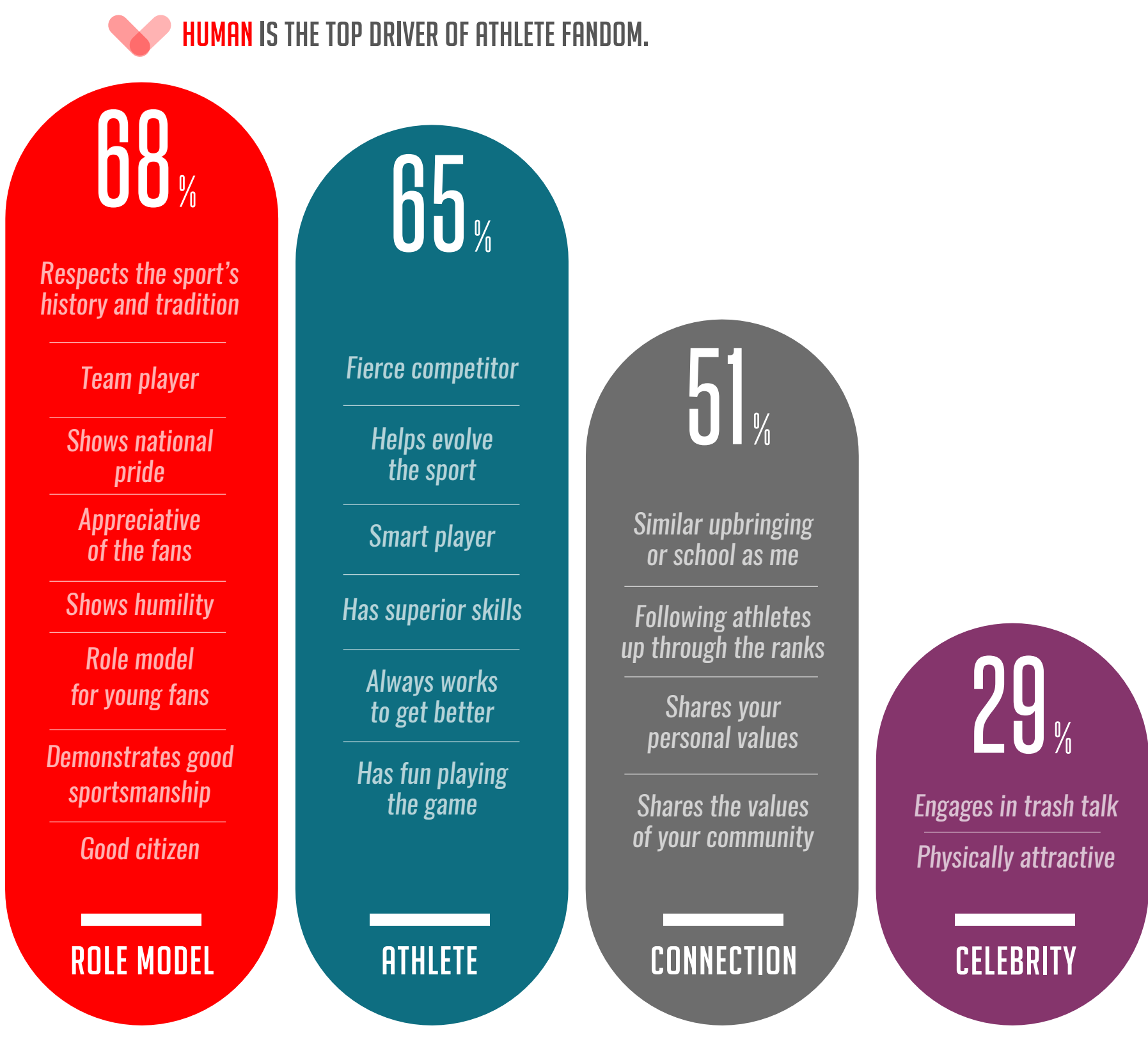
THREE'S THREE:

- 1 While accomplishment on the field is important, fans are more likely to connect with athletes who are good role models.
- 2 Fans want to see the human side of athletes—their true personality, their sense of humor, and the causes they support—on social media.
- 3 To build relationships with fans, brands should partner with athletes who are known for exemplary acts on and off the field.

We previously explored the role of team culture in attracting fans and maintaining loyalty. Because athletes are often the most public face of a team's culture, it is also important to understand fan expectations for the **athletes** they follow and love. Fans connect with athletes in many ways, and out of all connection factors, **fans agree on one thing: they want to know the human in the helmet.**

Fans Connect with Role Models

Undoubtedly, fans love skilled, dedicated players who exhibit prowess, fairness, and help elevate their sport. **But what happens off the field is just as important as what happens on the field.** US fans are more likely to connect with players who respect their sport's tradition, are perceived as good citizens, show humility, and make all-around great role models for younger fans.



Senior writer at ESPN Magazine, LZ Granderson, speaks candidly about his expectations for athletes:

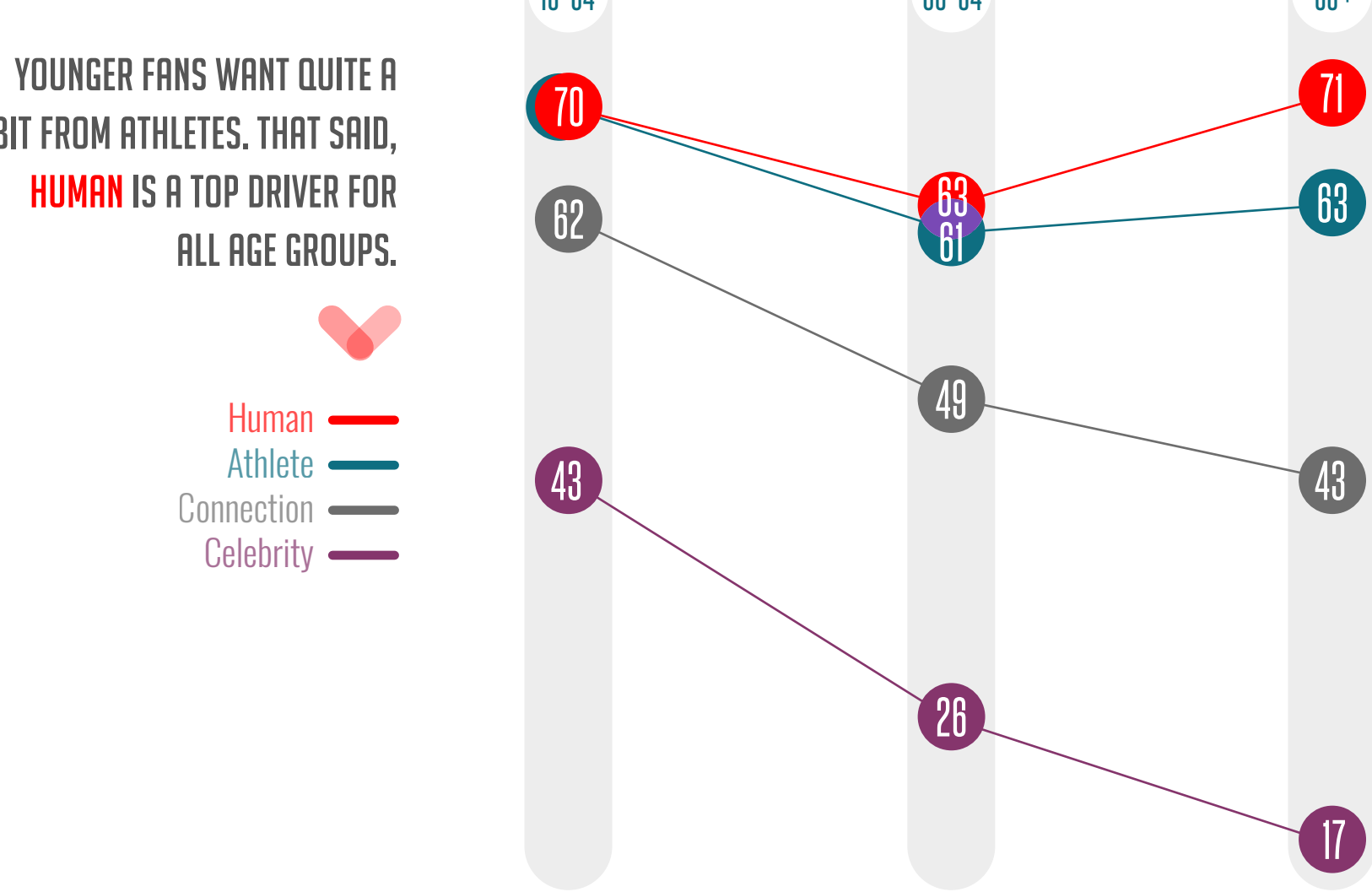


“There is no shame in black athletes not wanting to be role models, but there should be shame when they don't behave like one. It's a free country and people can do whatever they want. But just because we can doesn't mean we should. That's my belief, anyway.”

LZ Granderson, Senior Writer, ESPN Magazine

The Role Model Drives All

Younger fans do expect more from athletes than older fans. These fans want to feel connected through shared values and enjoy following players' development over time, and **yet they still want to know the genuine human attributes of their favorite athletes.** Athletes who practice good citizenship, share their values, and have a good time during the game have significant, positive impact on these fans.



Chris Long, 2019 Walter Payton NFL Man of the Year, emphasizes the importance of being authentic at all costs:

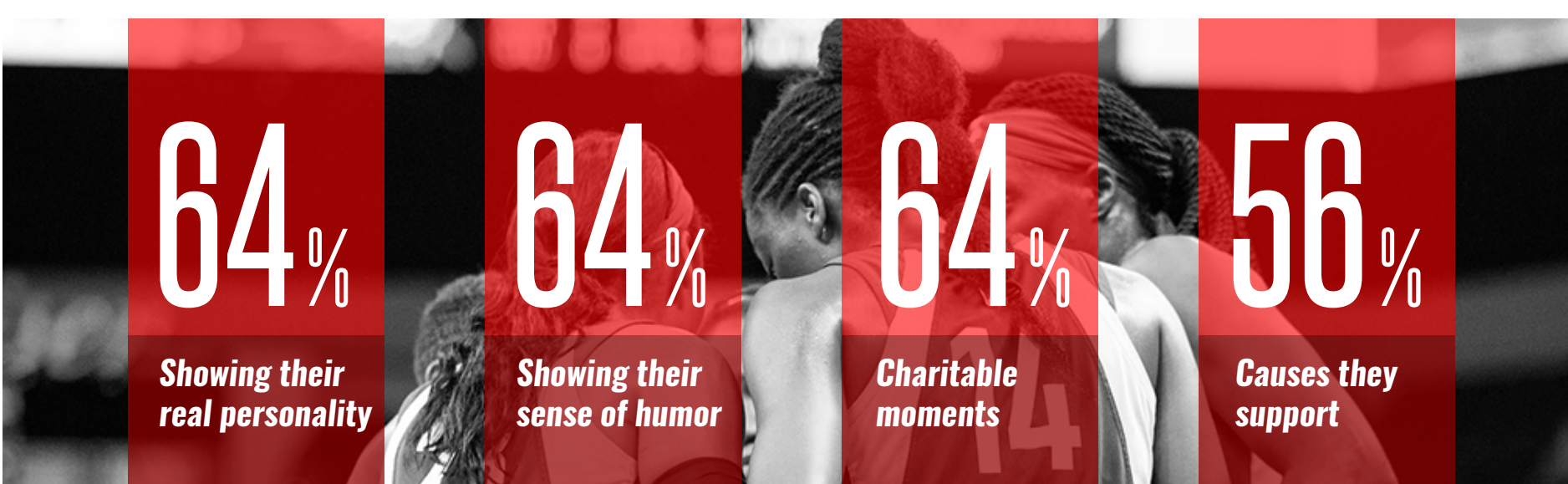


“I am personally not afraid to lose my job. . . . I would always just rather be me than be a fake version of me and have a job. And I'm lucky that I've been paid a lot of money to do what I love.”

Chris Long, 2019 Walter Payton NFL Man of the Year

Social Media Matters

Fans who emphasize athletes as role models are most interested in social media content that reveals **players' unfiltered personalities—from showing a sense of humor to supporting good causes.** Fans also enjoy seeing players spending time with family and friends on their social media feeds.



Jill Gregory, NASCAR Executive Vice President and Chief Marketing Officer, prioritizes NASCAR fans' connection with the people behind the wheel:



“We want our fans to know our drivers before they become stars. That way you feel a better connection to that driver as a person. That way you're more invested in their success and in the sport.”

No matter how we engage with fans, it will always be our goal to tell as many stories as possible to as many fans as possible so they can see inside our sport and really engage with the drivers.

Jill Gregory, NASCAR EVP and Chief Marketing Officer

The Brand Game

Human-focused fans focus on the human being before the athlete. **Significantly, these fans see their brand choices as reflections of their identity which communicate their individuality to others.** These fans prioritize their emotional wellness and care about the world we are creating for our children; they find inspiring and encouraging others fulfilling, and they call themselves compassionate, friendly, and family oriented.

Because their identity is tied up with their brand choices, human-focused fans look for brands that share their values. And, when athletes exhibit both their stellar athleticism and the elements that render them more human, they have the best opportunity to connect with fans. When athletes team up with organizations with strong cultural identities, they have the potential to become powerful, effective brand ambassadors.



