



## PUBLIC POLL FINDINGS AND METHODOLOGY

### How Streaming, Betting, Esports and NFTs are Changing How We'll Consume Sports in the Future

Ipsos research reveals generation, technology and cultural shifts are shaping how Americans engage with sports and what that means for brands

**NEW YORK, September 20, 2021** – A trio of macro trends are changing American sports fandom, according to new research from Ipsos. Generation Z is watching and following sports differently than prior generations. Digital collectibles like NFTs, sports betting and competitive video game competitions called esports are shifting the dynamics of sports spectatorship. Yet, gaps remain with inclusion and equality across sports coverage and interests. These changes will influence how Americans consume sports as viewers, bettors, fans and collectors in the coming years, as Ipsos explores in its Sports edition of **What the Future** magazine.

The driving insight is the sharp decline in relevance of sports TV for Gen Z adults, those born between 1996 and 2003. Just 43% of these viewers report watching at least one of the seven major sports categories regularly on TV. That's a 19% drop compared to Millennials (born 1982-1995) and Generation X adults (born 1964-1981), of which 53% watch at least one sports category regularly on TV. Conversely, 53% of Gen Zers use mobile or the internet to watch sports, versus 46% of Millennials and 27% of Gen X.

In this issue, Ipsos asks media, gambling, esports and digital collectibles experts four major questions about how new forms of sports engagement will impact future fandom:

- David Gandler, CEO and co-founder of FuboTV — What will it mean to watch sports in the future?
- Laila Mintas, CEO of PlayUp USA — What is the smart bet for how gambling will impact fan engagement?
- Jason Lake, CEO of Complexity Gaming and global head of esports for GameSquare Esports Inc. — How will esports impact traditional sports fandom and marketing?
- Katy Tedman, head of partnerships at Dapper Labs — How will the blockchain shape sports fandom?

Ipsos researchers also contribute insightful commentaries with opportunities for brands to prepare for and respond to the evolution in how people consume sports. They include how brands can help solve the chicken/egg dilemma in women's sports coverage; how the futures of fantasy sports and betting are linked; how brands can apply new insights about celebrity endorsers to esports figures; and how digital collectibles factor into Affluent sports collection habits.

Read the full issue [here](#). Below are research highlights followed by a topline of the custom survey results for the issue:

- 38% of Gen Z adults are familiar with esports versus 4% of Baby Boomers and Seniors combined. Yet, 31% of those familiar with esports say they are boring to watch. 23% of U.S. adults say they would watch virtual sports in virtual reality if it were available.

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**GAME CHANGERS**





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- 22% of U.S. adults bet on sports using an app or website, with men outbetting women by 3:1. The number of adults ages 18-34 who bet on an app or website is nearly double the national average at 39%.
- 13% of American adults are extremely familiar or very familiar with non-fungible tokens (NFTs), unique ownership certificates for digital objects on the blockchain. 43% of people with this level of familiarity bought TV and entertainment NFTs, 48% bought sports NFTs, 31% bought music NFTs and 18% bought art NFTs.
- 9:1 is the ratio of Gen Z adults to Baby Boomers (born 1946-1964) and Seniors (born prior to 1946) combined to have purchased sports trading cards and sports NFTs.
- (46%) of Americans agree there needs to be more media coverage of women's sports. Even more (60%) agree, among those that report following at least one sport closely.
- Among sports bettors, 59% place bets against teams they are rooting for if they think it will make them money. That figure rises to 67% among those who follow any sport closely. 31% of bettors only follow sports for betting.
- 78% of affluent collectors with a household income of \$125,000 or more buy sports NFTs as investments rather than for the fun of collecting or as a part of fandom. That's nearly three times more than the general population at 24%.

*These are the findings of an Ipsos poll conducted between August 5-9, 2021. For this survey, a sample of 2,039 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.*

**For full results, please refer to the following annotated questionnaire:**





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### Full Annotated Questionnaire

1. Please indicate below how you interact with the listed sport. Select all that apply for each sport.

#### Total Follow Closely Summary

	<b>Total (N=2,039)</b>
Professional men's sports, such as the NFL, NBA, MLB, etc.	19%
College men's sports (e.g., football, basketball, hockey, etc.)	13%
Mixed martial arts/UFC/boxing	6%
Professional women's sports, such as the WNBA, NWSL, WTA, etc.	5%
College women's sports (e.g., basketball, hockey, soccer, etc.)	5%
Esports (including individual or team competitions)	5%
Action/extreme sports (e.g., skateboarding, BMX, surfing, etc.)	4%

#### Total Not a Fan Summary

	<b>Total</b>
Esports (including individual or team competitions)	76%
Action/extreme sports (e.g., skateboarding, BMX, surfing, etc.)	75%
Professional women's sports, such as the WNBA, NWSL, WTA, etc.	73%
College women's sports (e.g., basketball, hockey, soccer, etc.)	70%
Mixed martial arts/UFC/boxing	70%
College men's sports (e.g., football, basketball, hockey, etc.)	53%
Professional men's sports, such as the NFL, NBA, MLB, etc.	38%

#### Total Attend in Person Summary

	<b>Total</b>
Professional men's sports, such as the NFL, NBA, MLB, etc.	13%
College men's sports (e.g., football, basketball, hockey, etc.)	9%
College women's sports (e.g., basketball, hockey, soccer, etc.)	4%
Professional women's sports, such as the WNBA, NWSL, WTA, etc.	3%
Esports (including individual or team competitions)	3%
Mixed martial arts/UFC/boxing	3%
Action/extreme sports (e.g., skateboarding, BMX, surfing, etc.)	3%



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a. Professional men's sports, such as the NFL, NBA, MLB, etc.

	<b>Total</b>
Follow closely	19%
Watch regularly on television	38%
Read regularly in newspapers/magazines	13%
Use mobile or the Internet to stay current	17%
Use mobile or the Internet to watch	13%
Play fantasy sports	7%
Attend in person	13%
Collect memorabilia/collectibles	7%
Wear team or athlete gear	17%
Not a fan	38%

b. Professional women's sports, such as the WNBA, NWSL, WTA, etc.

	<b>Total</b>
Follow closely	5%
Watch regularly on television	10%
Read regularly in newspapers/magazines	6%
Use mobile or the Internet to stay current	7%
Use mobile or the Internet to watch	6%
Play fantasy sports	2%
Attend in person	3%
Collect memorabilia/collectibles	2%
Wear team or athlete gear	3%
Not a fan	73%

c. College men's sports (e.g., football, basketball, hockey, etc.)

	<b>Total</b>
Follow closely	13%
Watch regularly on television	25%
Read regularly in newspapers/magazines	9%
Use mobile or the Internet to stay current	12%
Use mobile or the Internet to watch	9%
Play fantasy sports	3%
Attend in person	9%
Collect memorabilia/collectibles	5%
Wear team or athlete gear	11%
Not a fan	53%

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d. College women's sports (e.g., basketball, hockey, soccer, etc.)

	<b>Total</b>
Follow closely	5%
Watch regularly on television	11%
Read regularly in newspapers/magazines	7%
Use mobile or the Internet to stay current	7%
Use mobile or the Internet to watch	7%
Play fantasy sports	2%
Attend in person	4%
Collect memorabilia/collectibles	3%
Wear team or athlete gear	3%
Not a fan	70%

e. Esports (including individual or team competitions)

	<b>Total</b>
Follow closely	5%
Watch regularly on television	7%
Read regularly in newspapers/magazines	5%
Use mobile or the Internet to stay current	7%
Use mobile or the Internet to watch	7%
Play fantasy sports	3%
Attend in person	3%
Collect memorabilia/collectibles	2%
Wear team or athlete gear	3%
Not a fan	76%

f. Mixed martial arts/UFC/boxing

	<b>Total</b>
Follow closely	6%
Watch regularly on television	12%
Read regularly in newspapers/magazines	4%
Use mobile or the Internet to stay current	9%
Use mobile or the Internet to watch	9%
Play fantasy sports	2%
Attend in person	3%
Collect memorabilia/collectibles	2%
Wear team or athlete gear	3%
Not a fan	70%

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g. Action/extreme sports (e.g., skateboarding, BMX, surfing, etc.)

	<b>Total</b>
Follow closely	4%
Watch regularly on television	7%
Read regularly in newspapers/magazines	4%
Use mobile or the Internet to stay current	7%
Use mobile or the Internet to watch	8%
Play fantasy sports	3%
Attend in person	3%
Collect memorabilia/collectibles	2%
Wear team or athlete gear	2%
Not a fan	75%

2. How familiar are you, if at all, with esports?

	<b>Total</b>
Extremely familiar	7%
Very familiar	11%
Somewhat familiar	21%
Not very familiar	22%
Not at all familiar	39%
<i>Familiar (Net)</i>	<i>18%</i>
<i>Not familiar (Net)</i>	<i>61%</i>

Esports are professional video game competitions, often between formal teams of competitors. Now, we'd like to ask you some additional questions about sports, including esports.

3. How frequently, if at all, do you do any of the following?

Total Often + Sometimes Summary

	<b>Total</b>
Play video games by myself	48%
Play networked video games with others (e.g., WoW, Fortnite)	25%
Watch individual gamers/influencers on YouTube	22%
Watch individual gamers/influencers livestream, on services like Twitch	20%
Play for an in-person sports team or league (softball, hockey, bowling, etc.)	18%
Watch esports (individual or team competitions)	17%
Join fantasy sports leagues with people you know	17%
Bet on sports, using an app or website	14%
Join fantasy sports leagues with people you don't know	13%
Participate in esports	12%



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a. Watch esports (individual or team competitions)

	<b>Total</b>
Often	7%
Sometimes	10%
Rarely	11%
Never	68%
I used to, but do not now	2%
Don't know	2%
<i>Often + sometimes (Net)</i>	<i>17%</i>
<i>Rarely + never (Net)</i>	<i>79%</i>

b. Watch individual gamers/influencers livestream, on services like Twitch

	<b>Total</b>
Often	8%
Sometimes	12%
Rarely	11%
Never	66%
I used to, but do not now	1%
Don't know	2%
<i>Often + sometimes (Net)</i>	<i>20%</i>
<i>Rarely + never (Net)</i>	<i>77%</i>

c. Watch individual gamers/influencers on YouTube

	<b>Total</b>
Often	9%
Sometimes	13%
Rarely	12%
Never	62%
I used to, but do not now	2%
Don't know	2%
<i>Often + sometimes (Net)</i>	<i>22%</i>
<i>Rarely + never (Net)</i>	<i>74%</i>

d. Play networked video games with others (e.g., WoW, Fortnite)

	<b>Total</b>
Often	10%
Sometimes	15%
Rarely	8%
Never	62%
I used to, but do not now	3%
Don't know	2%
<i>Often + sometimes (Net)</i>	<i>25%</i>
<i>Rarely + never (Net)</i>	<i>70%</i>





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e. Play video games by myself

	<b>Total</b>
Often	25%
Sometimes	23%
Rarely	12%
Never	36%
I used to, but do not now	3%
Don't know	1%
<i>Often + sometimes (Net)</i>	<i>48%</i>
<i>Rarely + never (Net)</i>	<i>48%</i>

f. Participate in esports

	<b>Total</b>
Often	3%
Sometimes	9%
Rarely	8%
Never	76%
I used to, but do not now	3%
Don't know	2%
<i>Often + sometimes (Net)</i>	<i>12%</i>
<i>Rarely + never (Net)</i>	<i>84%</i>

g. Play for an in-person sports team or league (softball, hockey, bowling, etc.)

	<b>Total</b>
Often	6%
Sometimes	12%
Rarely	9%
Never	61%
I used to, but do not now	9%
Don't know	3%
<i>Often + sometimes (Net)</i>	<i>18%</i>
<i>Rarely + never (Net)</i>	<i>70%</i>

h. Join fantasy sports leagues with people you know

	<b>Total</b>
Often	7%
Sometimes	10%
Rarely	9%
Never	68%
I used to, but do not now	4%
Don't know	3%
<i>Often + sometimes (Net)</i>	<i>17%</i>
<i>Rarely + never (Net)</i>	<i>77%</i>





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i. Join fantasy sports leagues with people you don't know

	<b>Total</b>
Often	3%
Sometimes	10%
Rarely	9%
Never	73%
I used to, but do not now	3%
Don't know	2%
<i>Often + sometimes (Net)</i>	<i>13%</i>
<i>Rarely + never (Net)</i>	<i>82%</i>

j. Bet on sports, using an app or website

	<b>Total</b>
Often	5%
Sometimes	9%
Rarely	9%
Never	73%
I used to, but do not now	2%
Don't know	3%
<i>Often + sometimes (Net)</i>	<i>14%</i>
<i>Rarely + never (Net)</i>	<i>82%</i>

4. How much do you agree or disagree with the following?

### Total Agree Summary

	<b>Total</b>
There needs to be more media coverage of women's sports	45%
Watching sports on TV is just as much fun as attending in-person sporting events	37%
<b>[Asked if Q3 'Watch esports' ≠ never OR don't know]</b> Esports are boring to watch	31% <b>(N=562)</b>
We should have more mixed-gender sports at the college and professional levels	30%
I would watch live sports in virtual reality if it was available	30%
<b>[Asked if Q2 ≠ not at all familiar with esports]</b> I am more interested in esports than traditional video games	24% <b>(N=1,184)</b>
I would watch virtual sports in virtual reality if it were available	23%
<b>[Asked if Q2 ≠ extremely OR very familiar with esports]</b> I would like to learn more about esports	12% <b>(N=1,733)</b>





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- a. [Asked if Q3 'Watch esports' ≠ never OR don't know] Esports are boring to watch

	<b>Total (N=562)</b>
Strongly agree	10%
Somewhat agree	21%
Neither agree nor disagree	30%
Somewhat disagree	25%
Strongly disagree	14%
<i>Agree (Net)</i>	<i>31%</i>
<i>Disagree (Net)</i>	<i>39%</i>

- b. [Asked if Q2 ≠ extremely OR very familiar with esports] I would like to learn more about esports

	<b>Total (N=1,733)</b>
Strongly agree	2%
Somewhat agree	10%
Neither agree nor disagree	18%
Somewhat disagree	18%
Strongly disagree	51%
<i>Agree (Net)</i>	<i>12%</i>
<i>Disagree (Net)</i>	<i>70%</i>

- c. [Asked if Q2 ≠ not at all familiar with esports] I am more interested in esports than traditional video games

	<b>Total (N=1,184)</b>
Strongly agree	9%
Somewhat agree	15%
Neither agree nor disagree	24%
Somewhat disagree	20%
Strongly disagree	32%
<i>Agree (Net)</i>	<i>24%</i>
<i>Disagree (Net)</i>	<i>52%</i>

- d. There needs to be more media coverage of women's sports

	<b>Total</b>
Strongly agree	18%
Somewhat agree	28%
Neither agree nor disagree	32%
Somewhat disagree	8%
Strongly disagree	15%
<i>Agree (Net)</i>	<i>45%</i>
<i>Disagree (Net)</i>	<i>22%</i>



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- e. We should have more mixed-gender sports at the college and professional levels

	<b>Total</b>
Strongly agree	12%
Somewhat agree	19%
Neither agree nor disagree	35%
Somewhat disagree	12%
Strongly disagree	22%
<i>Agree (Net)</i>	<i>30%</i>
<i>Disagree (Net)</i>	<i>35%</i>

- f. Watching sports on TV is just as much fun as attending in-person sporting events

	<b>Total</b>
Strongly agree	12%
Somewhat agree	26%
Neither agree nor disagree	26%
Somewhat disagree	19%
Strongly disagree	17%
<i>Agree (Net)</i>	<i>37%</i>
<i>Disagree (Net)</i>	<i>36%</i>

- g. I would watch live sports in virtual reality if it was available

	<b>Total</b>
Strongly agree	11%
Somewhat agree	19%
Neither agree nor disagree	22%
Somewhat disagree	13%
Strongly disagree	36%
<i>Agree (Net)</i>	<i>30%</i>
<i>Disagree (Net)</i>	<i>48%</i>

- h. I would watch virtual sports in virtual reality if it were available

	<b>Total</b>
Strongly agree	8%
Somewhat agree	15%
Neither agree nor disagree	22%
Somewhat disagree	14%
Strongly disagree	40%
<i>Agree (Net)</i>	<i>23%</i>
<i>Disagree (Net)</i>	<i>55%</i>



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5. [Asked if Q3 'Bet on sports, using an app or website' ≠ never OR don't know] How much do you agree or disagree with the following statements?

### Total Agree Summary

	<b>Total (N=438)</b>
I prefer to bet on sports outcomes (who wins or loses)	63%
I place bets against teams I am rooting for, if I think it will make me money	59%
I feel more invested as a sports fan when I bet on sports	56%
I prefer to bet on events within a game (which player will have the most points, specific plays, etc.)	49%
I spend a lot of time researching games or sports to bet on	47%
I only follow sports for betting	31%

- a. I place bets against teams I am rooting for, if I think it will make me money

	<b>Total (N=438)</b>
Strongly agree	23%
Somewhat agree	36%
Neither agree nor disagree	19%
Somewhat disagree	12%
Strongly disagree	11%
<b>Agree (Net)</b>	<b>59%</b>
<b>Disagree (Net)</b>	<b>22%</b>

- b. I only follow sports for betting

	<b>Total (N=438)</b>
Strongly agree	8%
Somewhat agree	23%
Neither agree nor disagree	18%
Somewhat disagree	21%
Strongly disagree	30%
<b>Agree (Net)</b>	<b>31%</b>
<b>Disagree (Net)</b>	<b>51%</b>

- c. I prefer to bet on sports outcomes (who wins or loses)

	<b>Total (N=438)</b>
Strongly agree	20%
Somewhat agree	42%
Neither agree nor disagree	21%
Somewhat disagree	8%
Strongly disagree	8%
<b>Agree (Net)</b>	<b>63%</b>
<b>Disagree (Net)</b>	<b>16%</b>





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- d. I prefer to bet on events within a game (which player will have the most points, specific plays, etc.)

	<b>Total (N=438)</b>
Strongly agree	20%
Somewhat agree	29%
Neither agree nor disagree	24%
Somewhat disagree	14%
Strongly disagree	12%
<i>Agree (Net)</i>	<i>49%</i>
<i>Disagree (Net)</i>	<i>27%</i>

- e. I spend a lot of time researching games or sports to bet on

	<b>Total (N=438)</b>
Strongly agree	14%
Somewhat agree	33%
Neither agree nor disagree	24%
Somewhat disagree	16%
Strongly disagree	13%
<i>Agree (Net)</i>	<i>47%</i>
<i>Disagree (Net)</i>	<i>29%</i>

- f. I feel more invested as a sports fan when I bet on sports

	<b>Total (N=438)</b>
Strongly agree	24%
Somewhat agree	33%
Neither agree nor disagree	21%
Somewhat disagree	12%
Strongly disagree	10%
<i>Agree (Net)</i>	<i>56%</i>
<i>Disagree (Net)</i>	<i>22%</i>

6. Thinking about how you watch sports, which of the following applies to you, if any?

	<b>Total</b>
I stream or watch most sports on a phone, laptop, or tablet	19%
I have subscribed to a specific streaming service to get specific sports content	15%
I subscribe to multiple TV streaming platforms to get all of the sports content I need	14%
I have upgraded or altered my cable package to get specific sports content	13%
I have borrowed streaming logins from friends or family to watch sports	9%
None of these	57%



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7. How familiar are you with Non-Fungible Tokens or NFTs? These are unique digital properties and collectibles that are stored via blockchain and available to be traded with others or sold.

	<b>Total</b>
Extremely familiar	6%
Very familiar	7%
Somewhat familiar	11%
Not very familiar	13%
Not at all familiar	62%
<i>Familiar (Net)</i>	<i>13%</i>
<i>Not familiar (Net)</i>	<i>75%</i>

8. How interested are you in learning more about Non-Fungible Tokens or NFTs?

	<b>Total</b>
Extremely interested	6%
Very interested	8%
Somewhat interested	16%
Not very interested	15%
Not at all interested	56%
<i>Interested (Net)</i>	<i>14%</i>
<i>Not interested (Net)</i>	<i>70%</i>

9. Which, if any, of the following have you purchased in the last 12 months?

	<b>Total</b>
Apparel, fashion items or sneakers	43%
<b>[Asked if Q7 ≠ not at all familiar with NFTs] TV and Entertainment NFT</b>	<b>15%</b> <b>(N=771)</b>
<b>[Asked if Q7 ≠ not at all familiar with NFTs] Sports NFT</b>	<b>13%</b> <b>(N=771)</b>
<b>[Asked if Q7 ≠ not at all familiar with NFTs] Music NFT</b>	<b>11%</b> <b>(N=771)</b>
Hollywood, music or other entertainment memorabilia	9%
Sports trading cards	7%
Pokémon, Magic, Yu-Gi-Oh! or other gaming cards	7%
Other sports memorabilia	7%
Fine art	6%
<b>[Asked if Q7 ≠ not at all familiar with NFTs] Art NFT</b>	<b>6%</b> <b>(N=771)</b>
None of these	42%

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10. [Asked if selected any at Q9] What was the main purpose for your purchase of the following collectibles?

a. Sports NFT

	<b>Total (N=83)</b>
Investment	24%
Fun of collecting	43%
Part of fandom	32%
Other	*

b. Art NFT

	<b>Total (N=40)</b>
Investment	44%
Fun of collecting	33%
Part of fandom	21%
Other	3%

c. Music NFT

	<b>Total (N=67)</b>
Investment	33%
Fun of collecting	35%
Part of fandom	30%
Other	1%

d. TV and Entertainment NFT

	<b>Total (N=96)</b>
Investment	19%
Fun of collecting	43%
Part of fandom	32%
Other	6%

e. Sports trading cards

	<b>Total (N=118)</b>
Investment	29%
Fun of collecting	49%
Part of fandom	16%
Other	7%

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f. Pokémon, Magic, Yu-Gi-Oh! or other gaming cards

	<b>Total (N=129)</b>
Investment	17%
Fun of collecting	46%
Part of fandom	25%
Other	12%

g. Other sports memorabilia

	<b>Total (N=128)</b>
Investment	19%
Fun of collecting	41%
Part of fandom	34%
Other	6%

h. Hollywood, music or other entertainment memorabilia

	<b>Total (N=164)</b>
Investment	13%
Fun of collecting	38%
Part of fandom	42%
Other	7%

i. Fine art

	<b>Total (N=103)</b>
Investment	27%
Fun of collecting	43%
Part of fandom	16%
Other	14%

j. Apparel, fashion items or sneakers

	<b>Total (N=905)</b>
Investment	7%
Fun of collecting	25%
Part of fandom	20%
Other	48%



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### About the Study

These are the findings of an Ipsos poll conducted between August 5-9, 2021. For this survey, a sample of 2,039 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.

The sample was randomly drawn from [Ipsos' online panel](#), partner online panel sources, and "[river](#)" [sampling](#) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2018 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Posthoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 2.5 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=2,039, DEFF=1.5, adjusted Confidence Interval=+/- 4.0 percentage points).

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## PUBLIC POLL FINDINGS AND METHODOLOGY

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