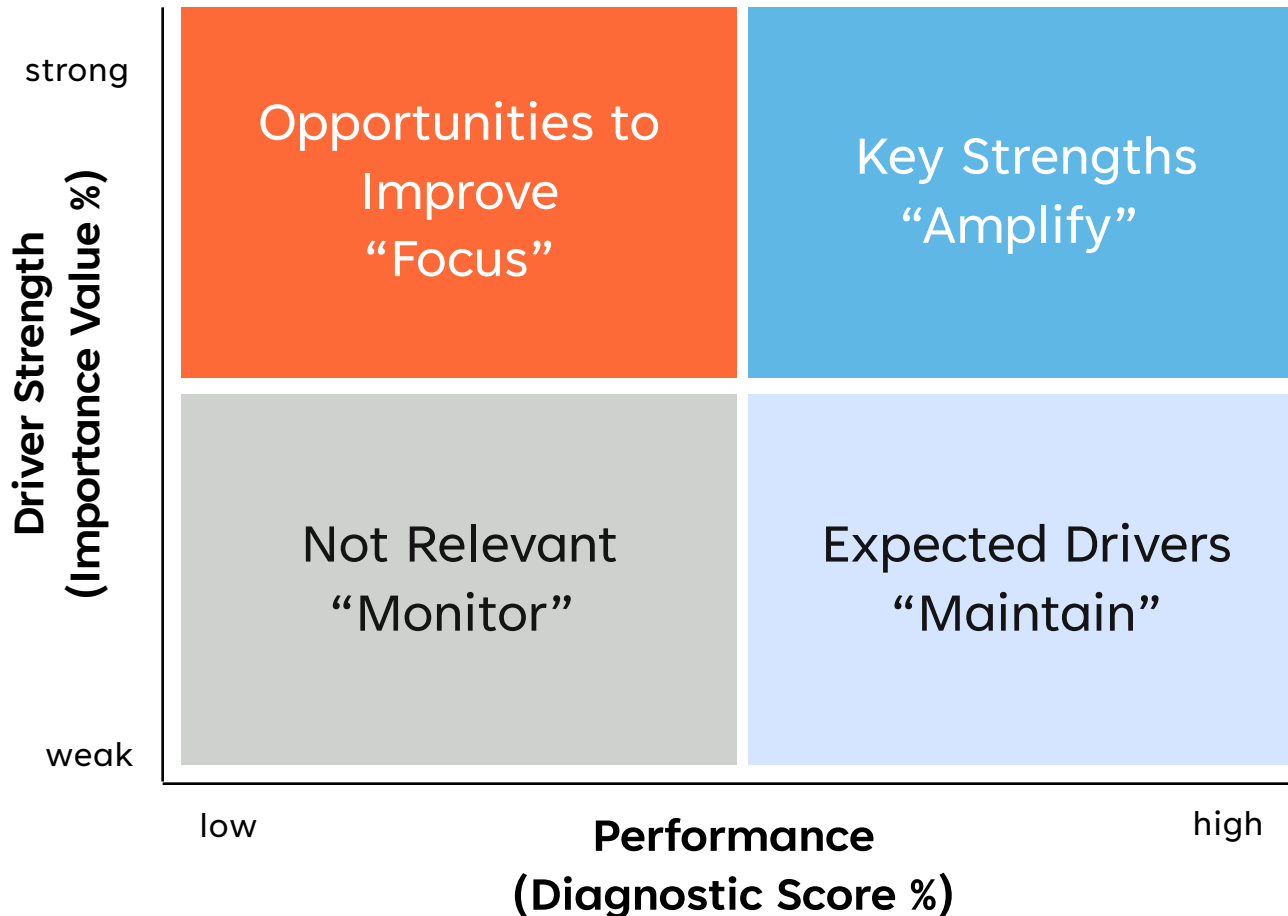


Industry Analysis: Sports & Leagues

H1 2023

Interpreting the Results

The relative weighting analysis derives the Driver Strength for each of the 20 perception diagnostics to the Mindshare and Purchase Intent scales. "Top Drivers" are those diagnostics with Driver Strength (Importance Values) above the median for that Industry. Key Strengths are those diagnostics also with Performance (Diagnostic Score) above the median for that Industry, and Opportunities to Improve have Performance below the median.



Key Strength: These are the stronger importance drivers as well as common perceptions for the Industry. These are attributes to amplify in communications / messaging.

Opportunities to Improve: These are stronger importance drivers but not commonly associated with the Industry, making them opportunities to focus on and improve. Enhanced investment here will likely yield the largest impact to brands.

Expected Drivers: These are weaker drivers but common perceptions of the Industry. Consumers expect a brand to have strong performance in these areas to be able to compete in the Industry, however enhancing focus here will not likely yield a strong impact to the brand.

Not Relevant: These are both weaker drivers and less commonly associated with brands in the Industry, therefor are considered least relevant for the Industry

Word of mouth and engagement drive love and purchase of sports & leagues brands, representing category opportunities

Top 5 Key Drivers of Mindshare for Sports & Leagues

Among Gen Z (n=576)

1. Pay Attention To
2. Talked About
3. Recommended
4. Express Who You Are
5. Gets You

Among Millennials (n=1,034)

1. Pay Attention To
2. Recommended
3. Express Who You Are
4. Gets You
5. Talked About

Top 5 Key Drivers of Purchase Intent for Sports & Leagues

Among Gen Z (n=576)

1. Pay Attention To
2. Talked About
3. Recommended
4. Express Who You Are
5. Cool

Among Millennials (n=1,034)

1. Pay Attention To
2. Recommended
3. Gets You
4. Express Who You Are
5. Like To Hear From

Mindshare for sports and leagues is highly driven by the “buzz” around brands, including brands they naturally **pay attention to**, brands that are **talked about** and **recommended** in their social circles, as well as brands that **get them** and help them **express who they are**.

An opportunity exists for sports & leagues brands to build stronger connections with young consumers and generate more buzz in the category.

Similar to mindshare, purchase intent for sports and leagues is driven by brand “buzz,” including brands they naturally **pay attention to** and **recommend**, as well as brands that **get them** and help them **express themselves**. However, sports and leagues brands are not strongly associated with these attributes, positioning these as opportunities for improvement.

Gen Z is uniquely driven by **cool** brands, that are unique and stands out from competitors, which is a perceived strength in the category. Millennials are uniquely driven by brands they **like to hear from**, though they consider it to be an opportunity for improvement.

A background image showing a woman sitting on a couch with a dog. The image is overlaid with a dark blue, semi-transparent grid pattern. The woman is wearing a light-colored top and dark pants. The dog is sitting next to her, and she is looking towards the camera.

Additional Info

METHODOLOGY OVERVIEW

1

- We used our [Performance Drivers](#) methodology to analyze the importance drivers for both Mindshare and Purchase Intent for an entire Industry, rather than at the individual brand level.
- Only the brand ratings for the top 50% of performers by YScore+ within each Industry were used.
- Region: North America (U.S. & Canada)
- Brand ratings were collected weekly from 1/2/2023 - 7/2/2023 (H2 2023)
- Analyses available for each Industry for:
 - All 13-39-year-olds
 - Gen Z
 - Millennials
- Analyses will be updated 2x per year

2

Performance Driver
Analysis conducted separately for the following Industries:

- CPG (Food & Beverage) (n=4,139)
- Education Technology (n=2,952)
- Fashion & Apparel (n=10,618)
- Financial Services (n=3,386)
- Health & Beauty (n=4,199)
- Home Improvement (n=2,412)
- Household Goods (n=1,983)
- Intimates (n=2,904)
- Media, Tech, & Entertainment (n=25,320)
- Retail (n=3,182)
- Sport & Leagues (n=1,610)

3

- Looking for the Performance Drivers for your brand(s)? Use the [Performance Drivers dashboard](#) to run the drivers for any brand with any demographic audience.

YPulse's Youth-Centric Brand Diagnostics

YPulse's Brand Tracker assesses a holistic view of young consumers' affinity for brands using 20 unique measures.

20 Youth-Centric Diagnostics

Which of the following...?

1. Have a **BRIGHT FUTURE**
2. Are **COOL**
3. Are **ECO-FRIENDLY**
4. Helps you **EXPRESS WHO YOU ARE**
5. **GET YOU**

6. Have you **HEARD SOMETHING POSITIVE ABOUT** recently
7. Are **HOT** right now
8. Are **INNOVATIVE**
9. **KEEP GETTING BETTER**
10. Would you **LIKE TO HEAR FROM** more often

11. **MAKE THE WORLD A BETTER PLACE**
12. Do you **PAY ATTENTION TO**
13. Are **POPULAR** among you and your friends
14. Have you previously **RECOMMENDED**
15. **REFLECT DIVERSITY**

16. Are **RELIABLE**
17. **SUPPORT CAUSES** you care about
18. Have you **TALKED ABOUT** more often recently
19. Are **TRUE TO THEMSELVES**
20. Are **TRUSTWORTHY**

Performance Drivers Analysis Variables

YPulse Performance Drivers Analysis use Relative Weight Analysis to identify which of the 20 youth-centric performance diagnostics are most important in moving consumers further down the path of the two relationship scales we measure: Mindshare and Purchase Intent.

Mindshare Scale

Please tell us how well you know each of the following brands.

- I have never heard of this brand
- I have heard of this brand
- I am familiar with this brand / know about this brand
- I have bought from or financially supported this brand
- I am loyal to this brand
- This brand is one of my favorites

Purchase Intent Scale

How likely are you to buy or to use the brand in the future?

- Very Unlikely
- Somewhat Unlikely
- Somewhat Likely
- Very Likely

A black and white photograph of a group of young people standing together. In the center, a person is holding a large boombox. The image has a purple overlay on the left side where the text is located.

Want to go even *further* with a custom Performance Drivers Analysis?

Our Strategic Services Team can complete entirely custom drivers analyses for any group of brands and demographics and help you best leverage the findings.

Contact support@ypulse.com or your Customer Success Manager to learn more about our services options.