

Flat Track Roller Derby - Market Research

- Roller derby is played by approximately 1,250 amateur leagues worldwide, mostly in the United States.
- Professional roller derby quickly became popular; in 1940, more than 5 million spectators watched in about 50 American cities
- Word of mouth is responsible for attracting the majority of fans, either by having a friend or family member involved (34%) or hearing about it through a friend (23%)
- Print advertisements bring in ten percent of fans, but radio or TV advertisements are responsible for less than 2 percent.
- There has been a steady decline in cable TV subscriptions for much of the last decade – also known as “cord-cutting” — mostly attributable to the rise of the Internet and video-on-demand (VOD) platforms like Netflix and Hulu.
- Exposure through TV shows and movies may be a way to reach the next generation of derby fans.
- Derby fans have been stereotyped as people who don’t like other sports.
- Almost 60 percent of fans consider themselves a fan of traditional major sports such as football, baseball or basketball
- Derby fans keep up with sports through several channels. 70% watch sports or sports- related programming on TV. Over half (54%) keep up with sports by visiting websites, and just over a third (35%) listen to sports-related programming on the radio.
- The Global sports market reached a value of nearly \$388.3 billion in 2020, having increased at a compound annual growth rate (CAGR) of 3.4% since 2015. The market declined from \$458.8 billion in 2019 to \$388.3 billion in 2020 at a rate of -15.4%. The decline is mainly due to lockdown and social distancing

norms imposed by various countries and economic slowdown across countries owing to the COVID-19 outbreak and the measures to contain it.

- Factors that negatively affected growth in the historic period were covid-19 pandemic, doping scandals, shortage of sports officials and climate changes.
- Additional factors that could hinder the growth of the sports market in the future include threat from home entertainment and increasing regulations on sports.¹
- Some leagues prominently display their injuries, to embellish the image of violence or machismo.
- The largest governing body for the sport is the Women's Flat Track Derby Association (WFTDA), with 397 full member leagues and 48 apprentice leagues.

Market

- In February, 2020, ESPN, the top-grossing sports statistics app worldwide, increased its earnings by a factor of 4 compared to the total profits in February, 2019, reaching \$14 million in user spending.
- Kids and teens are getting in on the sport now too, as junior leagues like Atlanta Junior Roller Derby take root.
- WFTDA rules for minors, such as prohibiting hitting and accelerating into a block.
- In 2009, the feature film *Whip It* was based on roller derby and introduced general viewers to its rules and culture.
- College roller derby is also expanding in the United States.

¹ <https://www.thebusinessresearchcompany.com/report/sports-market>

- Zaina Arafat asserts in *Virginia Quarterly Review* that roller derby defies **heteronormativity** and patriarchal standards. In **Egypt**, Arafat says, there are expectations that a woman will not show visible scars, will have an unblemished body for her husband, and will refrain from activities that may damage her body. She says roller derby in Egypt is subversive, as it acts as an indirect political statement.
- Carly Giesler states that skaters enact sexualities that create or reclaim an identity, and their role parodies "hegemonic scripts of sexuality" through the use of costumes, derby names and personas. Giesler argues that female sports objectifies them for the male gaze, but roller derby turns this on its head by disregarding gender roles and norms.²
- While scores, news, and highlights remain core to the experience, the app now puts live streaming and video-on-demand (VOD) features on an almost even footing.
- A great way to build a strong community around your business and reinforce your brand image
- United States is the key market in the sports apparel and footwear industry holding the lion share of the market with over thirty percent.
- Many sports fans argue that women's sports are boring compared to men's sports. Simultaneously, women's sports, compared to men's sports, are rarely broadcasted in the media.
- Ninety-five percent of fans today have some form of interaction with their favorite team or league in the off-season
- Despite the improvements towards reaching gender equality in sports, female athletes still face numerous obstacles. The media, for example, present sports as if there are masculine (e.g., football and ice hockey) and feminine (e.g.,

² https://en.wikipedia.org/wiki/Roller_derby

gymnastics and figure skating) sports, aligning with traditional expectations of male and female athletes.³

Personal

- On an average day in 2017, millennials spent 6 fewer minutes on purchasing goods and services (40 minutes) than did non-millennials (46 minutes). Activities in this category include...household services, and government services.
- 65 percent of Millennial sports fans stated that they consumed sports content on Facebook at least several times per week.
- 53% of Gen Zers identify as sports fans, compared to 63% of all adults and 69% of millennials.
- Gen Zers are half as likely as millennials to watch live sports regularly and twice as likely to never watch.
- Esports are more popular among Gen Z than MLB, NASCAR and the NHL, with 35% identifying as fans.
- Kobe Bryant and LeBron James ranked as Gen Z's favorite sports figures with 11% and 10% of selections, respectively.
- Gen Zers currently between ages 13 and 23 are less likely than the general population to identify as sports fans.

Demographic

- 25 and 34 year old demographic comprises 41 percent of fans.
- Most are female (59% to 41% male)
- Fans 24 years old and younger are more likely to be female (83% versus 17% male)
- Ten percent of fans are 24 years old or younger
- Only 7 percent are 55 or older
- 35 to 54 year olds make up another 41 percent, average fan is just over 36 years old
- 4 out of 5 fans identify as straight; the remaining identify as gay, lesbian, bisexual or other
- With the emergence of male roller derby leagues, women make up 98% of active adult derby skaters. However, men are more than 60% of league volunteers (including referees).
- Browning said the NHL is investing in educating its players about how to effectively use social media to engage fans and grow their profiles based on feedback from the NHL Power Players, an advisory council of young fans the league formed in 2019.⁴
- Users on Gen Z's app of choice, TikTok, like to see athletes in the "raw and authentic, full-screen, vertical style" that the platform is known for, a TikTok spokesperson said.
- Those who watch live sports, more than three-quarters (77%) of Boomers (older than age 56) most commonly watch a TV broadcast, as compared to 57% of Gen X (ages 40 to 56) and just 35% of Millennials and Gen Z.⁵
- Only 5% of the public watches live sporting events on an unofficial or pirated streaming service. Boxing fans (11%), Millennials (9%) and NBA fans (8%) use pirated streaming services more frequently than the general public.

⁴ <https://morningconsult.com/2020/09/28/gen-z-poll-sports-fandom/>

⁵ <https://www.sportico.com/business/media/2021/poll-streaming-tv-1234620393/>

- 12% of Gen Zers watch live sports via illegal streams, while only 37% of that age group watch on a traditional television broadcast.
- Three-fifths (61%) of Americans currently subscribe to traditional cable TV, but 16% say they plan to cut the cord eventually, meaning that less than half (45%) of households currently subscribe to and plan to keep traditional cable TV. That number drops to 36% for Gen Z.