

Marketing to Sports Fans - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"85% of US adults follow at least one sport. The most passionate sports fans, Avid Fans, almost never miss a game/event for the sport/team they follow and account for more than half of sport fans (43%) or 109 million adults."

- **Gina Cavato, Lifestyles & Leisure Analyst**

This report looks at the following areas:

- **Game length may lead to multi-tasking viewers**
- **Cost of attending sporting events can be prohibitive for families**
- **Sports compete with a variety of activities for consumers' leisure time**

America's sport of choice is football, which attracts the most fans and generates the greatest annual revenue. Despite improvements to give fans wider access to games/events through streaming services or apps, fans still prefer to watch at home, on TV, and in real-time. While watching, fans are often "distracted," as many engage in other activities at the same time, namely their smartphones. However, viewing preferences, behaviors, and attitudes differ by the specific sport(s) that fans follow.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Marketing to Sports Fans - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Definition

Executive Summary

Figure 1: Sports Fans, by type, July 2017

The issues

Game length may lead to multi-tasking viewers

Figure 2: Attitudes about passion for sports, by Sports Fans and Avid Fans, July 2017

Cost of attending sporting events can be prohibitive for families

Figure 3: Avid Fans' attitudes about issues for sports, by sport followed, July 2017

Sports compete with a variety of activities for consumers' leisure time

The opportunities

Real-time viewing still dominates

Figure 4: Devices used by Avid Fans to watch sports – TV, by sport followed, July 2017

Access to fans during games transcends the TV

Figure 5: Sports Fans' concurrent sports viewing activities – digital and mobile items, July 2017

Fans' engagement with sports extends beyond just watching games

Figure 6: Fantasy sports and eSports engagement, by Sports Fans and Avid Fans, by age, July 2017

What it means

The Market – What You Need to Know

America's top sports leagues brought in \$35 billion in annual revenues

The most dedicated of fans, Avid Fans, skew young and male

Different sports have different types of fans

Sports compete with consumers' attention and interest

Tech advances benefit fans but hurt cable/satellite providers

Market Size

Major US sports leagues generate more than \$35 billion annually

Figure 7: Revenues of major US sports leagues (\$ billions), 2016-17 season

Figure 8: Key stats of major professional sports, 2016

Who Are Sports Fans?

85% of adults aged 18+ are Sports Fans, 43% are Avid Fans

Figure 9: Sports Fans, by type, July 2017

Avid Fans tend to be young, partnered/married, men...

Figure 10: Sports Fans vs Avid Fans, by gender, age, and marital status, July 2017

...who are parents (most likely dads), middle-income earners, and...

Figure 11: Sports Fans vs Avid Fans, by parent status and gender, and household income, July 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Marketing to Sports Fans - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

...Hispanic, employed, and urban dwellers

Figure 12: Sports Fans vs Avid Fans, by race/Hispanic origin, area, and employment status, July 2017

Key Demographics of Avid Fans by Sport

Football goes...all...the...way...for older adults

Figure 13: Avid Fans of professional football, by key demographics, July 2017

Basketball is a slam dunk for multicultural and young adults

Figure 14: Avid Fans of professional basketball, by key demographics, July 2017

Baseball is a grand slam for parents and Hispanics

Figure 15: Avid Fans of professional baseball, by key demographics, July 2017

Younger, more affluent Avid Fans are hooked on hockey

Figure 16: Avid Fans of professional hockey, by key demographics, July 2017

Young, Hispanic crowd gets a kick out of soccer

Figure 17: Avid Fans of professional soccer, by key demographics, July 2017

Market Perspective

Endless entertainment options could impact passion for sports

Sports Fans embrace the second screen

Figure 18: Sports Fans' concurrent sports viewing activities – digital and mobile items, July 2017

Sports may motivate fans to travel to other cities

Experience-based rewards elicit greater interest among young travelers

Figure 19: Interest in reward redemption options – Select items, by age, March 2017

Market Factors

Spending habits point to growth in leisure market

Figure 20: Perceived change in leisure and entertainment spending – Spending more or the same, 2014-17

Cable and satellite dish subscriptions are down...

Figure 21: Household cable and satellite dish subscriptions, 2010-17

...while smartphones are increasingly used for sports content

Figure 22: Attitudes about cell phones/smartphones – To keep up with news or sports, 2010-17

Key Players – What You Need to Know

Fans have wider access to watch sports and connect with athletes

Politics, cost, and health are on fans' minds

Ads on jerseys, split-screen play, and Vegas are changing the game

What's Working?

Non-traditional platforms joining the sports viewing space

Connecting with athletes (and fans) is seamless through social media

Fantasy sports continue to boom

What's Struggling?

For families, going to games means dishing out some serious cash

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Marketing to Sports Fans - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Political stances and criminal issues are having NFL fans tune out
CTE studies impact support and concern for athletes' health

What's Next?

Fast-paced lifestyles impact changes to the game
The next pro sports hub: Vegas, baby
Non-stop watching, thanks to in-screen advertisements
NBA opens opportunity for brand sponsorships on jerseys
Disney's ESPN to have its own sports streaming service

The Consumer – What You Need to Know

America loves football (no...not soccer)
TV beats out streaming and real-time trumps recorded sports viewing
Viewing on social media/apps most popular for pro soccer, tennis fans
Fans prefer to watch their teams' games/events at home
"Distracted" viewing allows for greater opportunity to reach fans
Team sports fans more likely to indulge in unhealthy food while watching
Home or away, hockey fans are willing to pay to watch their team
Football fans love to talk about their team and to watch with others
Connecting with friends is an important component of fantasy sports
Attending sports games/events on trip is a fun activity
Game length is an issue for three in 10 Avid Fans
Attending games is pricey and fans are more interested during playoffs

Sports Followed

Football is America's most followed sport
Figure 23: Team sports followed, by engagement, July 2017
Individual sports garner less interest than team sports
Figure 24: Individual sports followed, by engagement, July 2017
College sports elicit similar interest to professional team sports
Figure 25: Sports followed, by engagement, July 2017

Devices Used to Watch Sports

Sports Fans still watch their sports in real-time
Figure 26: Devices used to watch sports, by Sports Fans and Avid Fans, July 2017
Football fans most likely to watch games live, soccer fans record and stream
Figure 27: Devices used by Avid Fans to watch sports, by team sports, July 2017
Avid Fans of individual sport least likely to view in real-time
Figure 28: Devices used by Avid Fans to watch sports, by individual sports, July 2017

Platforms Used to Watch Sports

Nearly one in five Avid Fans use real-time updates for their team
Figure 29: Platforms used to watch sports, by Sports Fans and Avid Fans, July 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Marketing to Sports Fans - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Soccer fans most likely to turn to digital to watch games

Figure 30: Platforms used by Avid Fans to watch sports, by team sports, July 2017

One in three tennis fans watch competitions on social media

Figure 31: Platforms used by Avid Fans to watch sports, by individual sports, July 2017

Places Where Sports Are Watched

At-home viewing is most common

Figure 32: Places Avid Fans watch sports, by Sports Fans and Avid Fans, July 2017

Sports bar viewing is most common among basketball and soccer fans

Figure 33: Places Avid Fans watch sports, by team sports, July 2017

Viewing games in-person is most common among college sports fans

Figure 34: Places Avid Fans watch sports, by college sports, July 2017

Concurrent Sports Viewing Activities

Majority of Sports Fans do something else while watching sports

Figure 35: Concurrent sports viewing activities, by Sports Fans and Avid Fans, July 2017

Soccer fans skip commercials, stream music, listen to radio while watching

Figure 36: Concurrent sports viewing activities of Avid Fans, by team sports, July 2017

Avid Fans of pro golf are least likely to socialize while watching

Figure 37: Concurrent sports viewing activities of Avid Fans, by individual sports, July 2017

Food-related Behaviors

Unhealthy foods are a part of the game for three in 10 Avid Fans

Figure 38: Food-related behaviors, by Sports Fans and Avid Fans July 2017

Football fans indulge most in unhealthy food while watching sports

Figure 39: Food-related behaviors of Avid Fans, by team sports, July 2017

Fans of individual sports most likely to recognize athletic spokespeople

Figure 40: Food-related behaviors of Avid Fans, by individual sports, July 2017

Viewing-related Behaviors

Avid Fans travel and pay extra to watch sports

Figure 41: Viewing-related behaviors, by Sports Fans and Avid Fans July 2017

Hockey fans most likely to have cable primarily to watch sports

Figure 42: Viewing-related behaviors of Avid Fans, by team sports, July 2017

Golf and tennis fans more likely to have cable, record events

Figure 43: Viewing-related behaviors of Avid Fans, by individual sports, July 2017

Avid Fans of college sports watch at home and go on-the-road

Figure 44: Viewing-related behaviors of Avid Fans, by college sports, July 2017

Social-related Behaviors

Not all Sports Fans are "big sports fans"

Figure 45: Social behaviors, by Sports Fans and Avid Fans July 2017

Social component of sports is most important for football fans

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Marketing to Sports Fans - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 46: Social behaviors of Avid Fans, by team sports, July 2017

Individual sports fans don't need to bond with others to stay passionate

Figure 47: Social behaviors of Avid Fans, by individual sports, July 2017

Traditional Sports Alternatives: Fantasy and eSports

Participation in fantasy sports/eSports is low...but growing

Figure 48: Fantasy sports and eSports engagement, by Sports Fans and Avid Fans, July 2017

Young adults drive fantasy sports participation

Figure 49: Fantasy sports and eSports engagement, by Sports Fans and Avid Fans, by age, July 2017

Fantasy sports helps users stay connected – with others and their sports

Figure 50: Attitudes toward fantasy sports, by Sports Fans and Avid Fans, July 2017

Adults aged 25-44 enjoy the connecting element of fantasy sports

Figure 51: Attitudes toward fantasy sports, by Sports Fans and Avid Fans, by age, July 2017

Attitudes: Sports and Travel

Most Avid Fans consider sporting events to be a fun trip activity

Figure 52: Attitudes about travel for sports, by Sports Fans and Avid Fans, July 2017

Football fans are least likely to travel to watch live sports

Figure 53: Avid Fan's attitudes about travel, by team sports, July 2017

Tennis fans are willing to travel to other cities to watch live sports

Figure 54: Avid Fan's attitudes about travel, by individual sports, July 2017

Attitudes: Passion for Sports

Sports Fans are just as likely as Avid Fans to think games last too long

Figure 55: Attitudes about passion for sports, by Sports Fans and Avid Fans, July 2017

Soccer fans struggle most with season and game length

Figure 56: Avid Fans' attitudes about passion for sports, by team sports, July 2017

Attitudes: Issues for Sports Fans

Majority of fans think attending sporting events is too expensive

Figure 57: Attitudes about issues for sports, by Sports Fans and Avid Fans, July 2017

Tech advances impact soccer fans more than other major team sports

Figure 58: Avid Fans' attitudes about issues for sports, by team sports, July 2017

Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

Terms

Appendix – Market

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Marketing to Sports Fans - US - September 2017

Report Price: £3085.18 | \$3995.00 | €3666.43

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 59: Revenues of major US sports leagues (\$ billions), 2016-17 season

Figure 60: Household cable and satellite dish subscriptions, 2011-17

Figure 61: Attitudes about cell phones/smartphones – to keep up with news or sports, 2010-17

Appendix – Consumer

Figure 62: Team sports followed, by Sports Fans, July 2017

Figure 63: Individual sports followed, by Sports Fans, July 2017

Figure 64: College sports followed, by Sports Fans, July 2017

Figure 65: Team sports followed, by Avid Fans, July 2017

Figure 66: Individual sports followed, by Avid Fans, July 2017

Figure 67: College sports followed, by Avid Fans, July 2017

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com