

## Marketing to Sports Fans - US - August 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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



"Technology has impacted sports by changing the way fans follow their favorite teams and as digital marketing takes precedence. Modern fans expect to be targeted online and will increasingly expect leagues to offer a seamless experience across various devices and platforms."

### This report looks at the following areas:

- Fandom trending downward among kids
- Female fans are under-targeted and under-engaged
- How greed and bad publicity dampen enthusiasm for sports

Technology has impacted the way fans follow their favorite teams each season; modern fans expect to be targeted digitally and will increasingly expect leagues to offer a seamless experience across various digital platforms.

#### Key opportunity:

Sports fans are more likely to be male than female and there are opportunities for sports leagues and sports marketers to engage women.

#### Key obstacle:

One important issue facing the industry is that kids' interest in sports has been trending downward which could mean fewer fans in the future.

Other issues to contend with include the perception that the industry is prioritizes profits over the game, and the impact of bad publicity (eg, players making headlines for breaking the law).

BUY THIS  
REPORT NOW

VISIT:  
[store.mintel.com](http://store.mintel.com)

CALL:  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

APAC  
+61 (0) 2 8284 8100

EMAIL:  
[reports@mintel.com](mailto: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 - August 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

The issues

Fans of the future: Fandom down among kids

Figure 1: Percentage of kids who watch sports on TV at least occasionally, December 2007-December 2014

Female fans: Under-targeted and under-engaged

Money, money, money: Fans think the sports industry is too greedy

Figure 2: Attitudes toward sports and money, May 2015

Extra! Extra! Bad publicity dampens enthusiasm for sports

Time is of the essence: Being a sports fan can be time consuming

The opportunities

No child left behind: Targeting kids

Figure 3: Following sports as a family bonding activity, by parental status, May 2015

Market like a girl: Engaging female fans

These fans ain't loyal: Both team and player loyalty are important

Spin control: Preventing bad behavior from tarnishing a team's image

Figure 4: Impact of negative press on opinion of team/sports, by parental status, May 2015

What we think

### The Market – What You Need to Know

Sports generate nearly \$64 billion in North America

Fans also spending on extracurricular sports-related activities

The majority of US adults are sports fans

Mobile devices, cord cutting impact how fans watch sports

Following sports competing with more leisure activities than ever before

### Market Breakdown

Sports generate nearly \$64 billion in North America

Americans place billions in illegal bets each year

Fantasy sports generate \$3.6 billion annually

### Sports Fan Breakdown

The majority of US adults are sports fans

Figure 5: Dedication to following sports, May 2015

Men, Millennials and more affluent likely to be sports fans

Figure 6: Sports fans, by gender, generation, household income, May 2015

### Market Perspective

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Marketing to Sports Fans - US - August 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

### Mobile devices impact how fans watch sports

Figure 7: Cell phone/smartphone and tablet ownership, February 2007-March 2015

### Cord cutting may hurt sports industry

Following sports competing with more leisure activities than ever before

Increasing involvement in fantasy sports may improve engagement

Kids' interest in sports ebbing, could impact the industry down the road

Figure 8: Percentage of kids who watch sports on TV at least occasionally, December 2007-December 2014

### Key Players – What You Need to Know

“Connected” is the name of the game – in more than one way

Keeping an eye on future fans and bad publicity

Technology's impact on sports only in its first inning

### Winning Moves

Sports make people feel more connected

Figure 9: “#THIS: Pence opts to avoid arm wrestle with young fan,” online video, 2015

Figure 10: “Football is our everything,” online video, 2015

Figure 11: “Chicago Basketball is Home – Derrick Rose,” online video, 2014

And making sports more “connected” opens new opportunities

Figure 12: “#49ersInHaiti playing catch with local children after hosting a football clinic,” Vine video, 2015

More game-watching options keeps fans engaged

Spotlighting celebrity fans can raise a team's profile

Figure 13: “LHN – All Access with Matthew McConaughey,” online video, 2014

### Losing Plays

Failure to engage fans of the future could spell disaster

Figure 14: Percentage of kids who watch sports on TV at least occasionally, December 2007-December 2014

Bad publicity may deter fans

Less popular sports still struggle, could benefit from increased involvement

### What's on Deck?

Wearable technology goes pro

The stadiums of the future

Figure 15: “Capture Your Moment,” online video, 2014

All about access

Daily fantasy sports could lead to more engaged fans

### The Consumer – What You Need to Know

Football is America's favorite sport

TV shows and networks most popular, fans prefer to watch full games

Home is “home base” for watching sports

Fans likely to watch alone, with housemates

Men more interested in details and commentary, more likely to play in fantasy leagues

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

# Marketing to Sports Fans - US - August 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

- Water and soda help fans stay hydrated
- Salty snacks, meat, carryout fuel fans
- Following sports provides a sense of belonging
- Greed puts off fans, negative press dampens enthusiasm

## Sports Followed

- Two thirds follow professional sports, four in 10 follow college teams
- Figure 16: Engagement in professional and college sports leagues – Sports fans, May 2015

## Football: Professional and College – is a Fan Favorite

- Football draws the crowds
- Figure 17: Sports followed at least occasionally, May 2015

## Who are Sports Fans?

- Sports Fans population skews male
- Black fans drawn to fast-paced sports

## How Sports Fans Stay Up-to-date

- TV shows and networks most popular, fans still prefer to watch full games
- Figure 18: Resources sports fans use to stay up-to-date, May 2015
- Social media important, Facebook in particular

## Watching Companions

- Fans likely to watch alone, with housemates
- Figure 19: Watching companions, May 2015
- Female fans bring the family together
- Figure 20: "Play Like Me!" and "#FuelGreatness with School Breakfast," online videos, 2014-15
- Millennials – always looking for an experience – more likely to watch with others

## Where Fans Watch

- Home is "home base" for watching sports
- Millennials are key target for out-of-home viewing
- Figure 21: Watching venues, by generation, May 2015
- Sports bars are the venue of choice for the biggest fans
- Figure 22: Watching venues, by level of sports dedication, May 2015

## Information of Interest and Related Activities

- Fans follow players, team news
- Figure 23: Information of interest and related activities, May 2015
- Men more interested in details and commentary, more likely to play in fantasy leagues
- Millennial sports fans are significantly more engaged
- Fantasy websites provide access to high-income fans, dads
- Hyper-fans predictably more engaged

## Food and Drink Consumed While Watching Sports

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)  
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100  
 EMAIL: [reports@mintel.com](mailto:reports@mintel.com)

## Marketing to Sports Fans - US - August 2015

Report Price: £2466.89 | \$3995.00 | €3133.71

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

Water and soda help fans stay hydrated

Figure 24: Beverages consumed while watching sports, May 2015

Millennials are the thirstiest sports fans

Urban fans opt for alcohol

Hyper-fans' taste more sophisticated than may be expected

Salty snacks, meat, carryout fuel fans

Figure 25: Food and snacks consumed while watching sports, May 2015

For Black fans, watching sports works up quite an appetite

Hyper-fans eat healthy snacks

Eating, drinking, and watching sports go hand-in-hand-in-hand

### Motivations for and Barriers to Following Sports

Following sports provides a sense of belonging

Figure 26: Motivations for following sports – Any agree, by generation, May 2015

Greed puts off fans, negative press dampens enthusiasm

Fans believe pro sports more about money, being a fan is too expensive

Time is money

Bad publicity may deter fans

Figure 27: Barriers to following sports – Any agree, by generation May 2015

### Consumer Segmentation

Figure 28: Sports fans segmentation, May 2015

The Die-hard Fans (35%)

The "Not a fan" Fans (38%)

The Other Fans (27%)

Figure 29: Attitudes toward sports, by sports fans segments, May 2015

### Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Abbreviations

### Appendix – The Consumer

Figure 30: Engagement in professional and college sports leagues, May 2015

Figure 31: Percentage of kids who watch sports on TV at least occasionally, December 2007-December 2014

Figure 32: Kids' ownership of any licensed sports clothing, December 2007-December 2014

Figure 33: Sports league apparel owned by kids, December 2007-December 2014

Figure 34: Percent of kids who play sports video games, December 2007-December 2014

BUY THIS  
REPORT NOW

VISIT: [store.mintel.com](http://store.mintel.com)

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

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: [reports@mintel.com](mailto:reports@mintel.com)