

## Marketing to Sports Fans - US - July 2016

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.



"Professional football leads the pack as the most popular American sport, followed by baseball and basketball. Avid Fans often follow all three (or more) traditional sports and keep up with their favorite teams by watching sports news, reading articles online, and even scanning the local paper."

- Dana Macke, Senior Lifestyles and Leisure Analyst

### This report looks at the following areas:

- More than two thirds of Avid Fans follow multiple sports
- Future fandom driven by early participation
- Football dominates sports culture, but there is a decline in youth participation

For the purposes of this Report, Mintel categorizes respondents based on their level of engagement with sports:

- Sports Fan :  
Someone who follows sports (net of Avid Fans  
,  
Casual Fans,  
and  
Occasional Fans  
).
- Avid Fan :  
Someone who almost never misses his/her team's game/event, for at least one of the sports evaluated.
- Casual Fan :  
Someone who watches at least half of his/her team's games/events, for at least one of the sports evaluated.
- Occasional Fan :  
Someone who occasionally watches games/events for at least one of the sports evaluated.
- Non-fan :  
Someone who does not follow any of the sports evaluated.

Analysis is based on  
*Sports Fans*

. The terms "major sports" and "traditional sports" refer to the following:

- Professional football
- Professional baseball
- Professional basketball
- Professional hockey

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

China  
+86 (21) 6032 7300

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 - July 2016

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.

- Professional tennis
- Professional golf
- Professional auto racing
- Professional soccer
- College football
- College basketball

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Marketing to Sports Fans - US - July 2016

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

More than two thirds of Avid Fans follow multiple sports

Figure 1: Number of sports followed by Avid Fans, May 2016

Future fandom driven by early participation

Figure 2: Motivations to follow sports – History, by Sports Fans and Avid Fans, May 2016

Football dominates sports culture, but there is a decline in youth participation

Figure 3: Kids' participation in popular sports, January 2009-December 2015

The opportunities

Women could be an incremental audience for fantasy sports

Figure 4: Sports engagement, by gender, May 2016

Professional leagues can improve perceptions among fans and non-fans

Figure 5: Perceptions of sports leagues, select attributes, May 2016

New media channels have low penetration even among Avid Fans

Figure 6: Keeping up with sports, by Sports Fans and Avid Fans, May 2016

What it means

### The Market – What You Need to Know

US sports bring in more than \$27 billion in annual revenues

Avid Fans are typically young, White, males

Sporting goods market is strong, but some chains fail to compete

Fantasy sports grow in unlikely areas

Youth sports participation declines, but kids are still fans

A strong economy boosts leisure spending

### Market Size – Major Sports Leagues

Major sports leagues in the US reap more than \$27 billion annually

Figure 7: Revenues of major US sports leagues (\$ billions), 2013-14 season

### Key Demographics of Avid Sports Fans

Avid football fans reflect the demographics of average Americans

Figure 8: Profile of avid NFL fans, indexed to all Avid Fans, by key demographics, May 2016

Baseball wins with families

Figure 9: Profile of avid MLB fans, indexed to all Avid Fans, by key demographics, May 2016

Young fans gravitate toward basketball

Figure 10: Profile of avid NBA fans, indexed to all Avid Fans, by key demographics, May 2016

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Marketing to Sports Fans - US - July 2016

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.

## American soccer fans are young and affluent

Figure 11: Profile of avid soccer fans, indexed to all Avid Fans, by key demographics, May 2016

## Market Perspective

### Sports Authority loses footing amid \$44 billion sporting goods market

Figure 12: Estimated annual sporting goods stores retail sales, 2005-13

### Fantasy sports leagues expand into new areas

### The NFL soars in popularity, but kids less likely to be devoted players

Figure 13: Kids' participation in popular sports, January 2009-December 2015

### Slight decline in licensed gear among kids, but NFL apparel continues to be popular

Figure 14: Kids' ownership of licensed college/professional sports apparel, January 2009-December 2015

Figure 15: Kids' ownership of licensed college/professional sports apparel, by sport, January 2009-December 2015

## Market Factors

### Economic stability can boost recreational spending

Figure 16: Perceptions of financial health, 2013-16

### Experiential spending provides personal satisfaction

Figure 17: Perceived change in spending – Spending more, by category, 2016 versus 2013

## Key Trends – What You Need to Know

Sport marketers go beyond TV

Stadium amenities aim to please

Golf participation and viewership flags

Brazil faces Olympic-sized challenges

Female fans may be hard to gain in light of bad PR

Daily fantasy sports face legal battles

NFL admits link to CTE, only after settlement is reached

Alternative sports may convert non-fans

## What's Working?

Marketers create breakthrough ads to engage fans

Stadium amenities turn up the dial on the fan experience

Social platforms create dedicated spaces for Sports Fans

## What's Not Working?

Golf participation is down, and TV ratings have followed

Figure 18: Adults who participate in golf, February 2009-March 2016

Figure 19: Masters final round TV audience (millions of viewers), 2007-16

Drug scandals, Zika concerns, and safety issues threaten the success of 2016 Summer Olympics

Will watching sports impact the health of fans?

Misogynistic sports stories float to the surface in 2016

Fantasy leagues face restrictive legislation

High-priced sports packages may lead more to cut the cord

**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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

# Marketing to Sports Fans - US - July 2016

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.

CTE threatens the future of football

## What's Next?

Fans turn to alternative sports for something new and different

"Moneyball" strategy influences more than just MLB

Stadiums get smarter

Some Rio events to be broadcast in virtual reality

## The Consumer – What You Need to Know

Avid Fans watch all the sports

Football continues to dominate

Let's go. While we're young.

Fans watch sports news to keep current

Avid Fans demonstrate more "fanatical" behaviors

Pro leagues may want to polish their images

Athletes can step-up as role models

## Sports Followed

An avid fan of one sport, is an avid fan of many sports

Figure 20: Number of sports followed by Avid Fans, May 2016

Professional football reigns

Figure 21: Sports followed, May 2016

As expected, men over index as sports lovers

Figure 22: Sports followed, by gender, May 2016

College sports are for more than just students

Figure 23: Sports followed, by age, May 2016

Hispanics are interested in fútbol, but also football

Figure 24: Sports followed, by Hispanic origin, May 2016

Olympic sports and combat sports draw crowds

Figure 25: Other sports followed, by frequency of write-in entry, May 2016

## What Drives Fandom?

A history of sports engagement drives future followers

Figure 26: Motivations to follow sports – History and entertainment May 2016

Non-fans are not entertained

Figure 27: Barriers to following sports, May 2016

Some fans driven by pride, or connecting with their past

Figure 28: Motivations to follow sports – Connection and pride, May 2016

Women more attracted to the entertainment aspect of sports

Figure 29: Motivations to follow sports, by gender, May 2016

White Sports Fans feel closely connected with teams

Figure 30: Motivations to follow sports, by race, May 2016

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

## Marketing to Sports Fans - US - July 2016

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.

### Connecting with friends motivates young Sports Fans

Figure 31: Motivations to follow sports – Connecting with friends, by age, May 2016

### Fans of all ages enjoy the strategy behind the game

Figure 32: Motivations to follow sports – Strategy, by age, May 2016

## How Fans Keep Up with Sports, Teams, and Players

### Traditional media keeps Sports Fans in the know

Figure 33: Keeping up with sports, by Sports Fans and Avid Fans, May 2016

### Older fans read the newspaper, but not magazines

Figure 34: Keeping up with sports – Paper sources, by age, May 2016

### Women less likely to actively keep up with sports news

Figure 35: Keeping up with sports, by gender, May 2016

### Hispanic Sports Fans use digital means to follow their teams

Figure 36: Keeping up with sports – Digital sources, by Hispanic origin, May 2016

### Sports fans of all races use sports news as a main resource

Figure 37: Keeping up with sports – Popular sources, by race, May 2016

## Engagement with Sports

### Most fans keep it casual

Figure 38: Sports engagement, May 2016

### Mirror, mirror, on the wall, who are the biggest Sports Fans of all?

Figure 39: Perception of being an above-average sports fan, by sports followed by Avid Fans, May 2016

### A quarter of fans are interested in sports stats

Figure 40: Sports engagement – Statistics and gambling, May 2016

### Women less likely to be “super fans”

Figure 41: Sports engagement – Statistics and gambling, by gender, May 2016

### Young fans devote their time to sports-related activities

Figure 42: Sports engagement – Fanatic behaviors, by age, May 2016

### Northeasterners believe they are the biggest fans

Figure 43: Perception of being an above-average sports fan, by region, May 2016

### Black Sports Fans less likely to believe they are “bigger fans than most”

Figure 44: Sports engagement – Fan behaviors, by race, May 2016

## Perceptions of Leagues

### Perceived strengths and weaknesses of professional leagues

#### Methodology

Figure 45: Correspondence Analysis – Perceptions of professional sports leagues, May 2016

### College sports decidedly affordable and appealing to young fans

Figure 46: Correspondence Analysis – Perceptions of professional versus college sports, May 2016

Figure 47: Perceptions of sports leagues, May 2016

## Attitudes of Sports Fans

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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

## Marketing to Sports Fans - US - July 2016

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.

### Sports fans split on league issues

Figure 48: Attitudes toward sports issues, May 2016

### All ages urge professional teams to take a stand

Figure 49: Attitudes of Sports Fans - Controversial issues, by age, May 2016

### Sports Fans perceive leagues in a more positive light than Non-fans

Figure 50: Attitudes toward sports league player treatment, by Sports Fans and Non-fans, May 2016

### Hispanic fans see the virtue in professional athletes

Figure 51: Attitudes of Sports Fans, by Hispanic origin, May 2016

### Fans aged 25-44 are key purchasers for team-related gear

Figure 52: Attitudes of Sports Fans toward ownership of team apparel, by key demographics, May 2016

## Appendix – Data Sources and Abbreviations

### Data sources

Consumer survey data

Consumer qualitative research

Abbreviations and terms

Abbreviations

## Appendix – Market

Figure 53: Revenues of major sporting leagues, 2013-14 season

Figure 54: Kids' participation in popular sports, January 2009-December 2015

Figure 55: Kids' ownership of licensed college/professional sports apparel, by sport, January 2009-December 2015

Figure 56: Kids' ownership of licensed college/ professional sports apparel, January 2009-December 2015

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 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

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