



INFILLION

THE NEW SPORTS FAN

**The Media, Tech, and Demographic
Trends that Advertisers Need to Know
to Reach Sports Audiences Today**





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THE CHANGING NATURE OF THE SPORTS FAN

Sports fans have always been a coveted audience for advertisers. Viewers are famously engaged and deliver the rapt attention that brands crave, and brands sponsoring teams or games can get a goodwill boost from supporters. One study after another has shown that sports fans are [more likely to pay attention to commercials](#), that they look favorably upon brands that [sponsor their home teams](#), and that this receptivity is [growing rather than shrinking](#).

Besides, for years, sports had stayed relatively analog as the rest of the world went digital, which meant that brands could stick to tried-and-true tactics. The Super Bowl still drew the enormous, multi-demographic, linear TV audiences that advertisers craved, and its high-impact commercial spots continued to command both enormous media spend and peak consumer attention. Broadcast and cable channels maintained a strong hold on the rights to air professional leagues and championships.

Infillion is an advertising technology company that is built for the connected, always-on consumer. We're also an expert at reaching sports fans, from our InStadium digital billboards, to our TrueX interactive streaming ad packages that can amplify a campaign around a major sporting event, to first-party targeting so precise that it can reach people who frequent golf courses or who use popular fantasy apps.

Our past research has shown that [consumers now live in an era of "constant consideration."](#) one in which they're absorbing media at a near-nonstop rate, and in which it's more important for a brand to stay in touch with them so that the decision to purchase can happen at precisely the right moment for that individual. These insights have helped us shape our strategies for clients to meet this new consumer reality.

Which led us to the question: As the overall consumer has changed, how has the sports fan changed?

WE DECIDED TO FIND OUT.



MEET THE NEW SPORTS FANS: HOW OUR RESEARCH WORKED

Infillion partnered with Lucid, a Cint Group company, to answer the question “How has the sports fan changed?” The measurement was aimed at evaluating behavioral and attitudinal trends among audience members aged 18+ who self-identified as sports fans. Infillion designed and deployed the study on our proprietary survey platform Phonic, with Lucid providing the audience sample. The study ran from December 11, 2023, to December 18, 2023, yielding a sample of 979 respondents after adjusting for response quality.

The top-level findings:

Our self-identified sports fans are split about evenly between men and women.

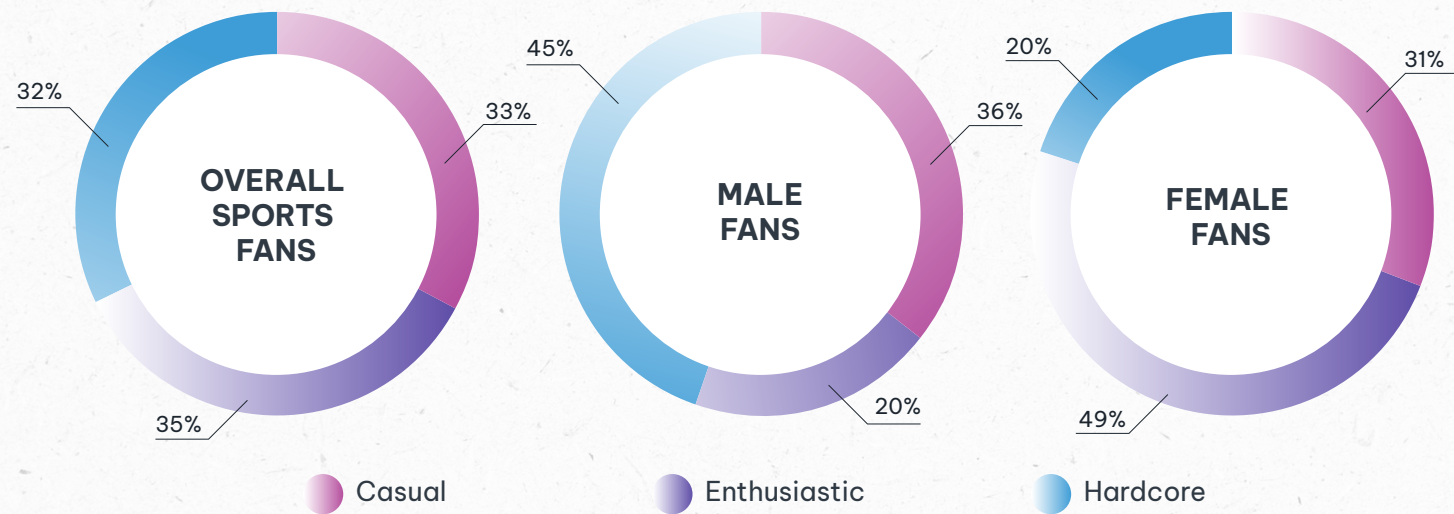
Our respondents turned out to be 51% female and 49% male.

Similarly, age demographics were evenly represented.

No generational age group—Boomers, Gen-X, Millennials, or Gen-Z—was disproportionately more or less likely to identify as sports fans.

Sports fans are divided evenly between casual, enthusiastic, and hardcore fans.

Casual fans (33% of sports fans) answered that they're "somewhat interested" in watching sports. Enthusiastic fans (35%) said they're "very interested." Hardcore fans (32%) said they're "extremely interested."



Historically, research has found that sports fans skewed male by about 10 to 15 percentage points. Today, with always-on access to more sports than ever, it's a little more complicated than that.

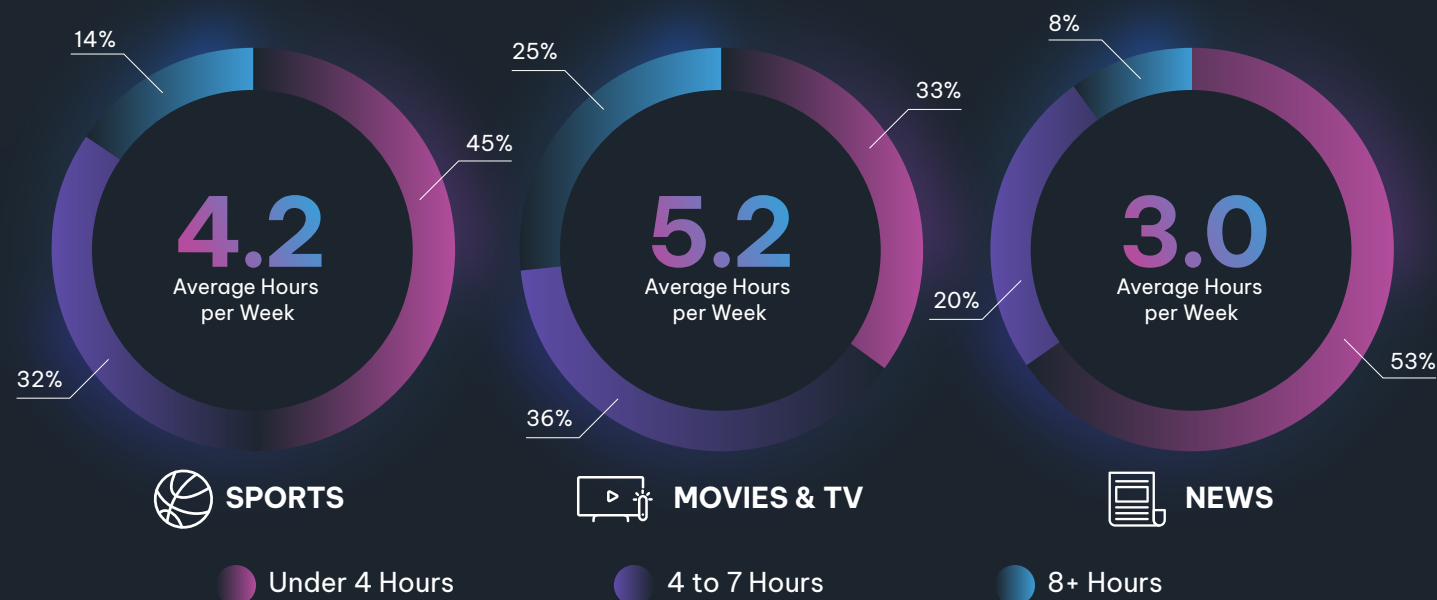
Male sports fans are more likely to identify themselves as hardcore fans (think: closely following a hometown pro team each season), whereas female fans are more likely to consider themselves enthusiastic fans (think: obsessively tuning in to the Olympics every four years). Casual fans, on the other hand, reflected a similar breakdown by gender to casual fans overall.



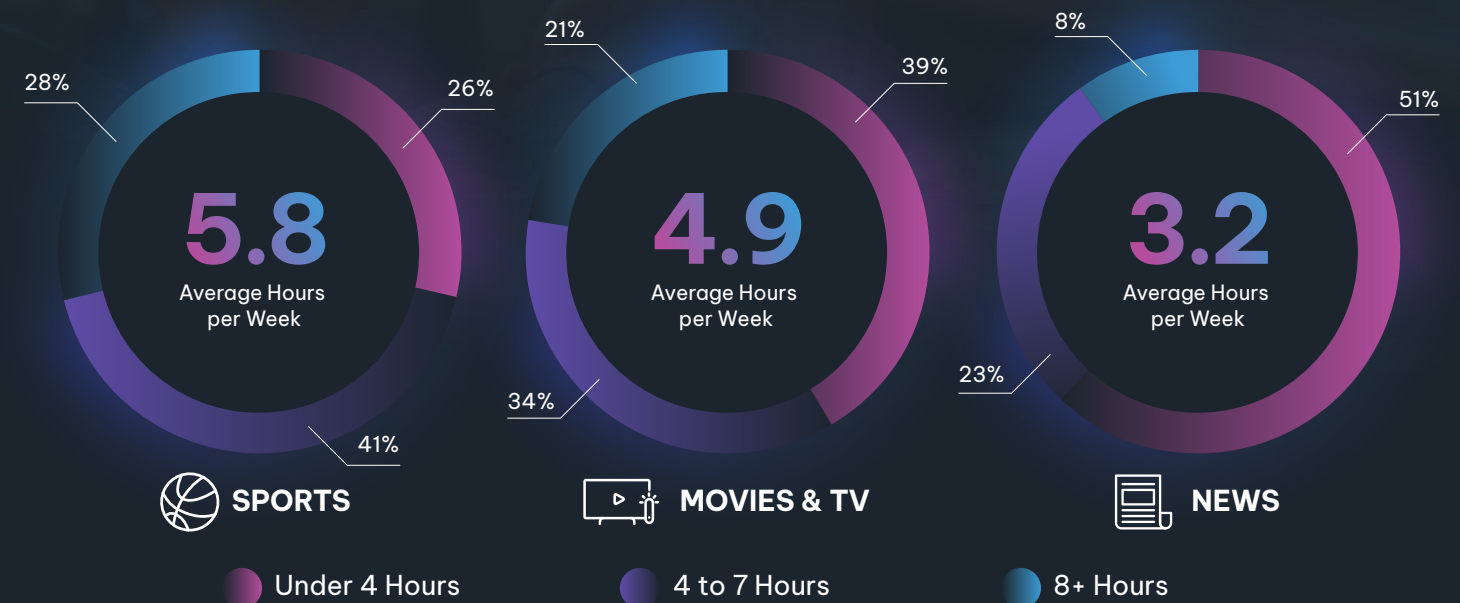
Sports fans also watch lots of other content—and we mean lots.

Contrary to the stereotype of obsessive sports fans who don't focus on anything else, Infillion's research found that even hardcore fans spend considerable amounts of time watching non-sports content every week.

Every week, across all platforms, devices, and live settings, **sports fans** spend **12.6 hours** per week watching:



Every week, across all platforms, devices, and live settings, **hardcore sports fans** spend **13.9 hours** per week watching:



This means that marketers looking to reach sports fans have an opportunity to target them during non-sports programming. **55%** of even **hardcore sports fans** spend **4+** hours per week watching movies and TV.

TRENDS FOR THE NEW SPORTS FAN

We analyzed our research findings and identified four primary trends that are shaping the sports fan of the mid-2020s:

1 UNDERDOGS RISING

It's not just you: Suddenly, everyone you know has a favorite soccer team. During the COVID-19 lockdown, fans tuned into sports they hadn't paid significant attention to before, either because their favorites were on hold or they just wanted to fill up some free time. And those new affinities have stuck. For brands, reaching sports fans is now a lot more complicated than relying on a set of media markets.

2 STREAMING SHOWDOWNS

As the sports world makes its long-anticipated shift to streaming video, sports fans are getting choosy about how they want to watch—and they're making it known to the streaming publishers they subscribe to. With fans often switching up streaming subscriptions based on which sports are in season, and vocally prioritizing price and user experience, being able to find them at a reliable place and time is no longer a given. It's a brave new world for the brands that want to connect with them.

3 CONSTANT CONTENT

New sports fans are being minted through unconventional means, such as scripted or documentary TV series, viral and meme-worthy moments—and, yes, the Taylor Swift effect. Concurrently, young fans in particular are looking for new content channels, from podcasts to fantasy sports news sites, to engage with their favorite sports long after the game ends.

4 FANDOM 360

Live sports took a blow during the COVID-19 lockdown but emerged from it with record crowds, but with a new challenge: Fans today want live sports to be a full, end-to-end experience, even a multi-day one. There's a fresh new opportunity for retail, hospitality, and travel brands to be part of the always-on sports fan's lifestyle.

MEET THE NEW SPORTS FANS

We asked the sports fans we surveyed: “How have your viewing habits changed in the past few years?” Here’s what some of them said, and some of the patterns we noticed.

CHOOSE YOUR OWN ADVENTURE

Tap into our trends by following the highlighted colors, and flip ahead to that section if you want to learn more.

UNDERDOGS RISING

STREAMING SHOWDOWNS

CONSTANT CONTENT

FANDOM 360

“When I had more time on my hands during the COVID-19 pandemic, I would watch basically any sport that was on TV just to fill the time. And so I got into things like WNBA and college volleyball...and now [today] I’m completely following them, not just watching them but paying attention to their records [and] following them on social media.”

- Millennial female, MN

“I picked up an interest in major cycling events such as the Tour de France. I accidentally stumbled upon the coverage on Peacock and was fascinated by how challenging the sport really is.”

- Boomer male, GA

“I watch more sports on my phone than I used to, and I picked up cricket. I started watching it when I saw an ad on TV.”

- Gen-Z male, GA

“I started watching pickleball because my aunt played it, and I keep watching because I now love to play as well.”

- Millennial male, NY

“I began watching Formula 1 races after binge-watching Drive to Survive on Netflix. I really like the drivers and the interaction available from the race teams—podcasts, online videos, etc.”

- Gen-X female, COA

“I have started watching more soccer. Our city got an MLS team, [which] is what got me started watching. I keep watching to learn the game.”

- Boomer male, TX

“I’ve started enjoying football more; if I’m honest it’s because Taylor Swift is dating Travis Kelce. It was never interesting before.”

- Gen-Z female, RI

“I have added ESPN+ so that I can view a few more games, mostly MMA and college basketball.”

- Boomer male, OH

“I’ve started watching more sports on my phone thanks to the Peacock app. I watch more soccer now than before, because it’s interesting and it was one of the few sports that had live games on in parts of 2020.”

- Millennial male, NY

“I never really watched soccer, but then my kids started playing it.”

- Millennial male, MI

“I have started to watch more football, and became more acquainted with the Chiefs because of Taylor Swift.”

- Millennial female, UT



UNDERDOGS RISING

It's not just you: Suddenly, everyone you know has a favorite soccer team. During the COVID-19 lockdown, fans tuned into sports they hadn't paid significant attention to before, either because their favorites were on hold or they just wanted to fill up some free time. And those new affinities have stuck. For brands, reaching sports fans is now a lot more complicated than relying on a set of media markets.

“

I saw that I could stream cricket, and decided to watch one day and got hooked on it. I still don't understand all the rules but I am learning.”

- Boomer male, NJ

The 2004 comedy *Dodgeball: A True Underdog Story* featured a fake ESPN offshoot called “ESPN 8: The Ocho,” a channel for coverage of extreme niche sports, with the joke being that they were so wildly outside the mainstream that only a few hardcore obsessives would care. But now, sports once thought of as niche are big business, and not just because the real ESPN broadcasts an annual “The Ocho” programming lineup that features sports like corgi racing and tractor pulling. Sports that were unheard of a few years ago, or that were thought to be unable to gain a serious foothold in the U.S., are attracting growing audiences, and the attention that advertisers crave.

Professional baseball, basketball, football, and hockey once seemed to have an unbreakable lock on U.S. sports fandom and, indeed, they still get the most attention from sports fans. But that's changing. The big challenger, unsurprisingly, is soccer. Both men's and women's soccer have caught up to hockey in interest, according to Infillion's research, and the WNBA—fresh off [a \\$75 million capital raise](#) to supercharge the league's footprint—is right there with them.

Which traditional pro and college sports are the most popular?

We asked sports fans to tell us which sports they currently enjoy watching.

	SPORTS FANS OVERALL	MEN	WOMEN
NFL FOOTBALL	73%	78%	70%
MLB BASEBALL	45%	53%	38%
NBA BASKETBALL	43%	52%	34%
COLLEGE FOOTBALL	42%	52%	32%
MEN'S COLLEGE BASKETBALL	34%	45%	23%
WNBA BASKETBALL	26%	29%	23%
WOMEN'S COLLEGE BASKETBALL	26%	26%	25%
WOMEN'S SOFTBALL	26%	27%	24%
NHL HOCKEY	22%	26%	18%
WOMEN'S SOCCER	21%	20%	22%
MEN'S SOCCER	20%	23%	17%



The NFL remains the clear leader in interest from sports fans, undoubtedly because of how many otherwise casual fans—or fans who ordinarily prefer other sports—tune in to the Super Bowl every year. But from the rise of the WNBA to soccer’s newfound popularity in the U.S., the numbers for sports beyond football get interesting.



NICHE GOING MAINSTREAM

In addition to soccer, other sports are emerging in the U.S. mainstream that had primarily enjoyed niche or overseas fan bases. Formula 1 car racing roared onto the Vegas Strip in November 2023 with its inaugural Las Vegas Grand Prix, attracting over 300,000 spectators and bringing the city [a billion-dollar economic boost](#). And while a sport's inclusion in the Olympics isn't an indicator of mass-market American fandom, three sports that have been on the rise stateside—flag football, lacrosse, and cricket—are highly anticipated upcoming additions to the quadrennial games.

Women's sports, too, are finally having their moment. The [all-time attendance record](#) for any women's sporting event was broken in August 2023, for a volleyball tournament at the University of Nebraska. And sure enough, volleyball piqued the

interest of Infillion's survey more so than any other women's sport. Meanwhile, the first stadium specifically built for a women's professional sport is [set to open in Kansas City](#), for soccer's Kansas City Current, co-owned by Kansas City Chiefs quarterback Patrick Mahomes and his wife, Brittany.

One factor that's driving new sports into the mainstream is the unique preferences of digitally native younger sports fans. Except for basketball and soccer, the major traditional pro sports generate notably less enthusiasm among the youngest demographic of American adults than older cohorts. Some of this behavior will change as Gen-Z gets older, but in the meantime, Gen-Z is getting interested in emerging sports. The standout is boxing and mixed martial arts (MMA), which ranked as one of younger fans' top sports in Infillion's survey, with 35% of Gen-Z saying they enjoy watching it. A likely reason for this? They follow the MMA and UFC stars who have become TikTok celebrities, and vice versa.

THE RISING FIVE

Want your brand to be seen alongside the next big thing? These fast-growing sports stood out in Infillion's research.

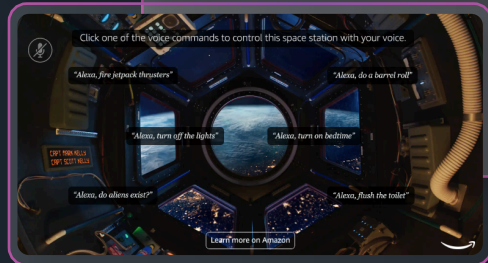
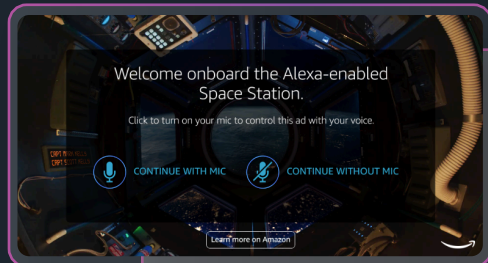
- 1 Soccer:** From Lionel Messi to Megan Rapinoe, soccer stars are finally household names in the U.S.—and our research found both men's and women's soccer are even with NHL hockey in popularity.
- 2 Women's Volleyball:** With 32% of sports fans saying they enjoy watching women's volleyball, it was the most popular women's sport in our survey by far.
- 3 Combat Sports:** TikTok-famous fighters have propelled the likes of MMA and UFC to popularity among young viewers. Gen-Z ranked it higher in popularity than any other sports besides NFL football and NBA basketball.
- 4 Cricket:** Gen-Z respondents were twice as likely as fans overall to say they enjoy watching cricket, making this soon-to-be Olympic sport one to follow among young viewers.
- 5 Motorsports:** *Drive to Survive*, a hit Netflix series about F1 racing, has made the historically Eurocentric car series a fresh sensation among Americans. Millennials and Gen-Z ranked motorsports ahead of golf and tennis in popularity in our survey.

FOLLOW THE TORCH

Want to reach female sports fans? You've got a great chance in 2024, thanks to the Olympics. Infillion's research found that female sports fans are 25%–30% more likely to watch the Olympics than male sports fans.



ALEXA, TAKE ME TO SPACE



Amazon used Infillion's TrueX technology to make an interactive offshoot of its Super Bowl LIII commercial, which ran across streaming video publishers. Viewers could control an "Alexa-powered" International Space Station in this eccentric ad narrated by astronaut Scott Kelly, which was honored by the OMMA Awards and Webby Awards.

UNDERDOGS RISING: THE ADVERTISER'S PLAYBOOK

Reaching someone who considers themselves a "sports fan" is no longer as simple as buying ads against a few key sports in the right broadcast TV media markets. Whether you're looking for Formula 1 superfans or pickleball enthusiasts, here are a few tactics for reaching the highly individualized sports fan of today.

THINK DIGITAL-FIRST.

Fans of soccer, F1, volleyball, and other rising sports are more likely to be heavy streaming viewers. They're frequently getting hooked on new sports because they're able to find games and matches on networks and apps like Peacock and ESPN+. They're also not necessarily watching live as much, given the time zone differences for rising sports that are popular internationally but may be inconvenient for viewing in the U.S. Reaching fans of these sports demands a streaming-first strategy that prioritizes next-generation platforms, mobile apps, and other on-demand digital content. Even if the audience watches big games on linear TV, their digital devices are likely their top priorities, so meet them where they are.

TAKE YOUR TARGETING TO THE NEXT LEVEL.

It gets difficult to pin down sports fans when they're tuning into multiple sports in a season, shifting their level of focus based on how well a team is doing, or getting deep into a sport that traditionally hasn't attracted much advertiser attention. That's where dynamic targeting matters, especially with the decline of third-party cookies. Survey-based first-party data like Infillion's TrueTargeting can capture intricate preferences about sports fans' habits. And privacy-proofed geolocation can help identify sports fans who are also spending time getting active at gyms or recreational facilities, or who prefer to watch games at bars rather than at home, and more.

Within an ad, interactive creative can offer opportunities for further audience segmentation. With a multipath ad experience such as the one Infillion's TrueX ads can offer, you can include creative that's designed to appeal to fans of multiple sports and allow them to choose their favorite.

MAKE BIG EVENTS A MULTIPLATFORM AFFAIR.

Huge sporting events like the Super Bowl and the Olympics tend to draw sports fans who might not otherwise tune into linear TV, especially if they're fans of sports that don't ordinarily air on cable or broadcast. Turning a Super Bowl ad's creative and messaging into ads for mobile, CTV, and even digital out-of-home can keep up the brand momentum for consumers in that "constant consideration" phase who might be interested—but not converted—by a splashy Big Game spot.



STREAMING SHOWDOWNS

As the sports world makes its long-anticipated shift to streaming video, sports fans are getting choosy about how they want to watch—and they're making it known to the streaming publishers they subscribe to. With fans often switching up streaming subscriptions based on which sports are in season, and vocally prioritizing price and user experience, being able to find them at a reliable place and time is no longer a given. It's a brave new world for the brands that want to connect with them.

“

**“I’m now
watching football
on Amazon Prime.”**

– Gen-X female, MA

As the world went digital in the 2000s and 2010s, and streaming media transformed the entertainment industry, sports coverage was comparatively slow in making the jump. Plus, sports were associated with live broadcasts, and streaming networks had become famous for the asynchronous, on-demand viewing that made the concept of “binge-watching” a household term. It didn’t seem like an instant fit.

But as we roll into the mid-2020s, sports—including mainstream pro sports—have gained a clear foothold in the streaming world. NFL Sunday Ticket, the package that gives fans access to games outside their media market, has made the jump from DIRECTV to YouTube. Thursday Night Football is now on Amazon Prime Video. And the NBCUniversal-owned Peacock has established itself as a destination for live and on-demand sports content, especially the Olympics and pro soccer. It also made streaming history in January 2024 as the exclusive broadcaster for the NFL playoff game between the Kansas City Chiefs and Miami Dolphins, a game that [drew in 23 million viewers](#) and made the day the highest-ever for U.S. internet traffic.

Sure enough, according to Infillion’s research, **46% of sports fans say they’re watching more sports on streaming than they were pre-2020**. But even beyond sports, a plethora of streaming options has meant fans can be choosy about how they watch, what devices they watch on, and what subscriptions they purchase. And their preferences get interesting.

DEVICE USE AND SPORTS VIEWING

One long-held belief that marketers have had about sports coverage has been that it’s best watched on a TV—and, indeed, [high-resolution TVs are often marketed to sports fans](#) specifically for that reason. But research over the past few years has found that Gen-Z viewers, accustomed to mobile-friendly TikTok content, [aren’t watching video on TVs like prior generations](#) and possibly never will. Infillion’s research of Gen-Z sports fans, however, found a more complex story.

The obvious caveat here is that content viewed on a TV can (and often does) also consist of linear content, not streaming. So, we also broke down the numbers to look at what we call “streaming-forward sports fans”—the 46% of sports fans who say they’re watching more sports on streaming than they were before 2020. While overall they’re watching sports content on a variety of streaming devices, they still prefer to watch it on a TV—82% say they often watch sports on TV, compared to 77% of sports fans in general.

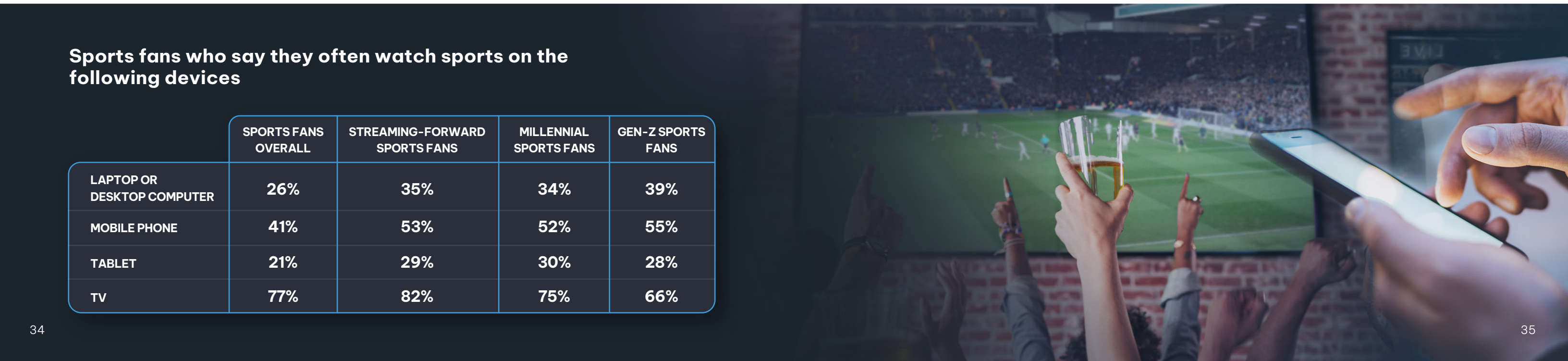
And what about digital natives? Millennial sports fans, and even more

so Gen-Z sports fans, are far more likely to split up their sports viewing on a variety of devices—computer, mobile, and tablet—than the overall sports fan. But they certainly aren’t giving up the living room TV. In summary, a strategy for reaching younger sports fans isn’t a TV-forward strategy or a mobile-forward strategy. Millennial and Gen-Z fans want sports content on the device that’s most convenient to them at the time, and reaching them demands a truly cross-device marketing strategy.

Now, let’s move on to one of the most contentious topics in advertising: the so-called “subscription wars.”

Sports fans who say they often watch sports on the following devices

	SPORTS FANS OVERALL	STREAMING-FORWARD SPORTS FANS	MILLENNIAL SPORTS FANS	GEN-Z SPORTS FANS
LAPTOP OR DESKTOP COMPUTER	26%	35%	34%	39%
MOBILE PHONE	41%	53%	52%	55%
TABLET	21%	29%	30%	28%
TV	77%	82%	75%	66%



CHAMPIONS OF CHURN?

One thing is clear from Infillion’s research: Live sports alone do not make sports fans spring for a streaming subscription. As we saw earlier, many sports fans spend even more time watching movie and TV content than they do sports, and their preferences in streaming services align with this.

What sports fans prioritize in a streaming service

	PERCENTAGE OF SPORTS FANS WHO CONSIDER IT VERY OR EXTREMELY IMPORTANT
PRICE	88%
SELECTION OF MOVIES/SHOWS	86%
ACCESS TO MY FAVORITE SPORTS	71%
AD-FREE OPTIONS	60%
ACCESS TO NEWS	52%
ACCESS TO SPORTS COMMENTARY AND ANALYSIS	48%
ACCESS TO HISTORIC GAMES/MATCHES	46%

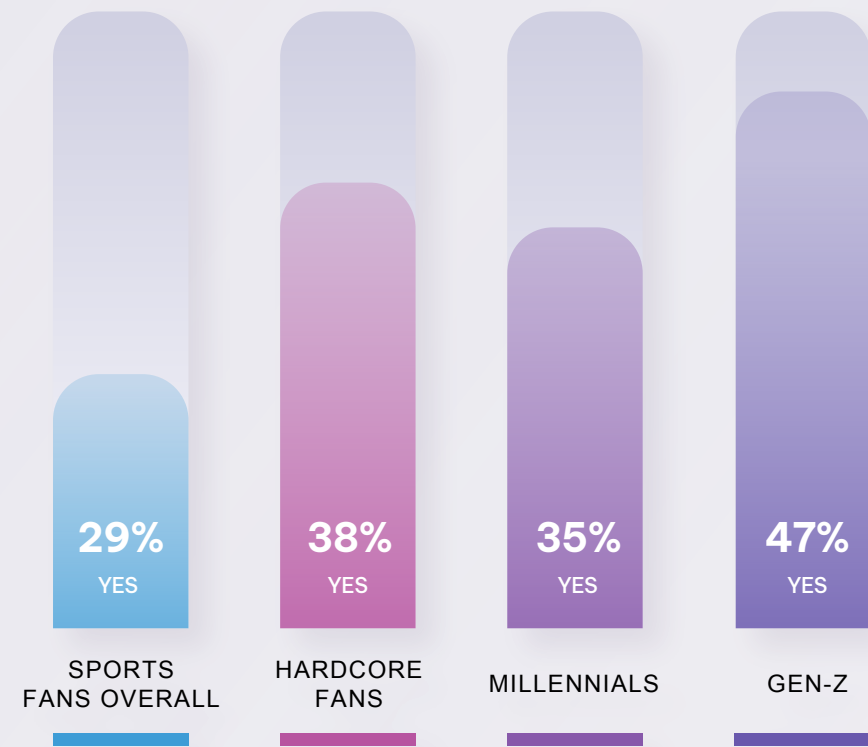
That might seem surprising at first: Access to non-sports content on streaming is still even more important than sports content. That’s likely a testament to how much big-ticket sports content can still be found on cable and broadcast, even if it’s simultaneously available on streaming. In short, many sports fans have switched their sports viewing to streaming because they were already watching other favorite content there.

But price remains the top factor in sports fans’ decisions as to which streaming subscriptions to purchase, with 88% of survey respondents saying that it’s “very” or “extremely” important to them. With streaming services [getting more expensive across the](#)

[board](#), subscribers feel pressured to be budget-minded.

Indeed, talking about streaming today is impossible without mentioning subscriber churn, [which currently stands at 47%](#) annually, according to Parks Associates. Infillion’s research found that, unsurprisingly, sports programming is a contributor to subscriber churn among sports fans. While just under a third of sports fans overall say they’ve canceled a streaming subscription due to a change in the live sports provided, that number goes up to 38% among hardcore fans and 47% among Gen-Z, younger viewers who may be more price-conscious.

Sports and streaming: Are fans canceling over live sports?

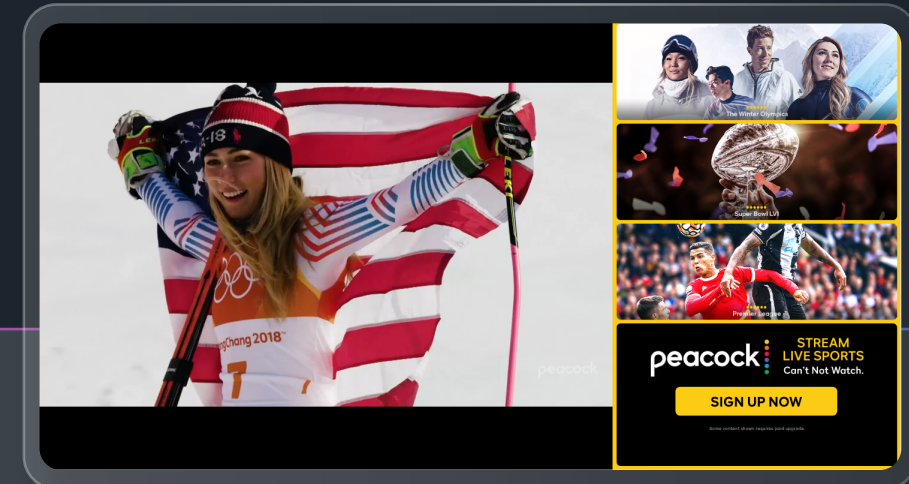


Have you ever canceled a streaming subscription because of a change in the live sports provided?

But when sports fans cancel a streaming subscription over sports, they often aren't gone for good. They frequently resubscribe when the same sport comes back in season the next year. For advertisers, this can be a challenge. You can't always reach the same sports fan in one place for long. And with many, especially younger viewers, viewership is fragmented not just across publishers but also across devices.

The answer for advertisers is at once simple and complex: Go big.

PEACOCK: A HUB FOR LIVE SPORTS



According to Infillion's research, 80% of sports fans subscribe to at least one subscription-based streaming network, and 46% of sports fans say they're watching more sports on streaming than they were before 2020. But it's a big behavioral shift for consumers, and it's been key for streaming publishers to build awareness of the sports content they offer and provide an easy path to subscribe.

NBCUniversal's streaming network, Peacock, has worked with Infillion to deploy ads for major sporting events like the 2022 Winter Olympics and the 2023 FIFA Women's World Cup, across online properties frequented by streaming audiences. These ads made it easy for users to sign up for a Peacock subscription—and sure enough, Peacock's breadth of live sports content helped it [add 4 million new subscribers](#) in Q3 2023.

ADS THAT GET FANS PLAYING... LITERALLY



People are naturally competitive, and [a classic Cornell University study](#) found that sports fans are even more so. And sure enough, Infillion's Creative Studio has found that ads that take the form of a game [drive some of the highest engagement](#) among users. So, why not engage sports fans that way?

Nonprofit Play Rugby USA, which brings the sport of rugby to underserved youth, worked with Infillion on a "two-screen" experience to drive awareness for the organization. Connected TV viewers could snap a QR code with their mobile phones that turned the phone into a game controller so that they could try out virtual rugby kicks on TV.

STREAMING SHOWDOWNS: THE ADVERTISER'S PLAYBOOK

CAST A WIDE NET WITH STREAMING PUBLISHERS.

Reaching sports fans seamlessly and sustainably means having a comprehensive advertising strategy across streaming publishers. A hardcore fan may be watching football on one streaming subscription, basketball on another a few months later, and soccer on a third subscription after that—and they may keep all three subscriptions year-round, or switch them up for cost-effectiveness. Even a fan who only follows football would most likely want multiple subscriptions to catch every single one of their favorite team's games, plus additional ones for documentary content.

PLAN MEDIA ACROSS DEVICES— ESPECIALLY TO REACH YOUNGER VIEWERS.

As we have seen, Millennial and even Gen-Z viewers still prefer to watch sports on the big screen, but they're also watching to a high degree on desktop, mobile, and tablet. This is why, to use a tactic from the last section of this report, cross-platform and cross-device campaigns are so important. Consider retargeting viewers of a connected TV ad using rich display media, like Infillion's NeXt, to help move them closer to a purchase.

PRIORITIZE USER EXPERIENCE.

60% of sports fans say they are "very" or "extremely" likely to prioritize streaming services with ad-free options, which [is in line with the preferences](#) of streaming subscribers overall (about two-thirds say they either prefer entirely ad-free services, or those with multiple tiers). But sports fans, like viewers in general, are far more likely to prioritize the cost of a service, which means that many fans are subscribing to ad-supported services even if it's not what they'd ultimately prefer.

There's a huge opportunity for advertisers to capitalize on this friction. Interactive units like Infillion's TrueX ads can allow users to reduce their ad loads while producing the same brand lift with fewer exposures. Consider ads that make it easy for fans to get back to the content they want, through add-to-cart shoppable features or a QR code scan that lets them finish interacting with the brand on their mobile phones later. Because even when they aren't watching live games, sports fans appreciate the attention to a good user experience. With quality ads, everybody wins.



CONSTANT CONTENT

New sports fans are being minted through unconventional means, such as scripted or documentary TV series, viral and meme-worthy moments—and, yes, the Taylor Swift effect. Concurrently, young fans in particular are looking for new content channels, from podcasts to fantasy sports news sites, to engage with their favorite sports long after the game ends.

“

“I am watching more football than ever. The storylines are fun to watch and it is the best sport to bet on.”

– Gen-X female, OH

In September 2023, rumors had been flying that pop star Taylor Swift, fresh off her record-breaking Eras tour in the U.S., was dating tight end Travis Kelce of the NFL’s Kansas City Chiefs.

The speculation had been stoked by Kelce mentioning on “New Heights,” the podcast he cohosts with his brother, Philadelphia Eagles center Jason Kelce, that he wished he’d gotten to meet Swift when her tour had stopped in Kansas City. And when Swift showed up at a Chiefs game alongside Kelce’s mother, [causing the internet to go nuts](#), the relationship was effectively confirmed. A [viral tweet](#) about Swift eating “chicken with ketchup and seemingly ranch” spawned a meme that got [brands like Heinz](#) in on the fun. Sales of Kelce jerseys jumped by 400%, and he [rocketed to the top](#) of fast-growing sports betting markets. And connected-TV giant Roku said that the

game had seen interest among women in the 18–49 demographic (in other words, prime “Swifties”) jump 63% from just the previous week.

Sports podcasts. Mainstream betting markets. Memes upon memes. And the very real phenomenon of “NFL Swifties.” Welcome to the new world of sports fandom—more diverse and far less predictable than a linear TV-dominated sports landscape, where there are far more outcomes and variables than just who wins.

On the one hand, this certainly makes it more complex for advertisers looking to reach sports fans. On the other hand, it’s creating more entry points for brands, and more opportunities for previously disengaged consumers to tune into sports culture.

YOUNGER SPORTS FANS WANT MORE CONTENT, NOT LESS

Despite widespread concern that younger Americans [aren't showing an interest in live sports](#), the real story is much more nuanced. As we mentioned earlier, Infillion's research found that members of Gen-Z are just as likely to consider themselves sports fans and hardcore fans compared to the average adult.

Let's start by going back to one of the questions we asked our survey respondents about sports content that they prioritize on streaming, and take a look at what Millennial and Gen-Z respondents said compared to the general sports fan population.

How do younger sports fans' preferences differ from fans overall?

	PERCENTAGE OF SPORTS FANS WHO CONSIDER IT VERY OR EXTREMELY IMPORTANT	PERCENTAGE OF MILLENNIAL SPORTS FANS WHO CONSIDER IT VERY OR EXTREMELY IMPORTANT	PERCENTAGE OF GEN-Z SPORTS FANS WHO CONSIDER IT VERY OR EXTREMELY IMPORTANT
ACCESS TO MY FAVORITE SPORTS	71%	74%	71%
AD-FREE OPTIONS	60%	66%	73%
ACCESS TO SPORTS COMMENTARY AND ANALYSIS	48%	53%	64%
ACCESS TO HISTORIC GAMES/MATCHES	46%	54%	60%

Regardless of age, seven in ten sports fans prioritize access to their favorite sports on streaming. But Millennial and Gen-Z also want **sports content beyond live games**. They're accustomed to having access to nearly unlimited podcast commentary, from Barstool to the Kelce Brothers. And younger viewers who aren't tuning into as many live games still want the social media-friendly recaps and analyses that can fill them in on what happened. Sure enough, while we found that 54% of sports fans say they keep up with all the latest sports news and analysis, that number jumps to 60% for Millennial and 61% for Gen-Z.

But wait—you may have taken note of a less savory number in there, which is that Millennial and Gen-Z show an even greater desire for ad-free content than the general sports fan population. Once again, the real story is more nuanced. One, just because people say they prefer their content to be ad-free doesn't mean they'll pay extra for it. And two, further Infillion research shows that younger sports fans don't mind having brands involved. They just want those brand integrations into their favorite sports to be relevant and engaging, not out-of-place or interruptive.

We asked sports fans to tell us if they agree with the following statements:

	SPORTS FANS OVERALL	MILLENNIAL SPORTS FANS	GEN-Z SPORTS FANS
I'M MORE LIKELY TO BUY PRODUCTS OR SERVICES THAT SPONSOR MY FAVORITE TEAMS AND ATHLETES	51%	59%	65%
I LIKE SEEING TEAMS AND ATHLETES I FOLLOW IN ADS	58%	65%	76%
I APPRECIATE IT WHEN ADVERTISERS SPONSOR A GAME	53%	64%	56%

The key here is for advertisers to understand—and to make it clear to fans and viewers—that their role is to support the team, the game, and the fans. Millennial and Gen-Z sports fans out-index the general sports fan demographic in wanting brand experiences that tie directly to their favorite athletes and teams. They also look favorably upon advertisers when they're seen as sponsoring and supporting a game rather than running interruptive ads in it.

It's important for advertisers across the board to understand that they're what stands between a consumer and the content they want to see. But that's doubly true with advertisers targeting sports fans. While 63% of sports fans surveyed by Infillion said that they pay more attention to sports on TV than they do when they're watching other TV content, 66% of them say they often tune out during commercial breaks. The onus is on advertisers to keep viewers interested with relevant, engaging ad creative that taps right into the same emotions that sports fans experience when watching the game.

SPORTS BETTING WINS WITH YOUNGER FANS

Being able to bet on games or participate in fantasy leagues is core to the sports experience for younger fans in particular. Infillion's research found that while 34% of sports fans overall regularly bet on the sports they watch, that number goes up to 46% for Millennial fans and 51% for Gen-Z fans. To tap into these young, gaming-friendly fans, why not turn your ads into games? Infillion's creative team can build in scratch-off challenges, 3-card monte, memory-based match games, and more.

DIGITAL NATIVES, DIGITAL-FIRST CONTENT CONTENT

It seems like a paradox: Gen-Z is made up of enthusiastic sports fans, yet research shows they're watching less live sports content. Gen-Z trend expert **Casey Lewis** gives us the reason:

"Televised sports are boring compared to what Gen-Z is used to consuming. Can you imagine a young person sitting down and watching a long, slow golf tournament? No way! That's why franchises like LIV and TGL are appealing—they combine experiential and digital with sport, making it more engaging in the moment. Bringing in experiential and digital also makes the sport itself more likely to go viral in clips online."

CONSTANT CONTENT: THE ADVERTISER'S PLAYBOOK

RETARGET SPORTS FANS ACROSS THEIR FAVORITE CONTENT.

especially for younger viewers. If you're running a campaign across live sports, consider retargeting fans with dynamic display ads like Infillion's NeXt to stay connected with them as they immerse themselves in sports-adjacent media, from fantasy sites to commentary hubs.

MAKE YOUR ADS HYPER-RELEVANT.

Fans appreciate when ads incorporate their favorite teams and athletes. With a combination of advanced creative and programmatic ad technology like Infillion's MediaMath, ad creative can be easily and seamlessly swapped in to customize an ad for the location, the time of day, the weather, or even how a team's doing at that point in the season. Giving sports fans something more personalized to seize upon can help get back that hard-to-capture attention.

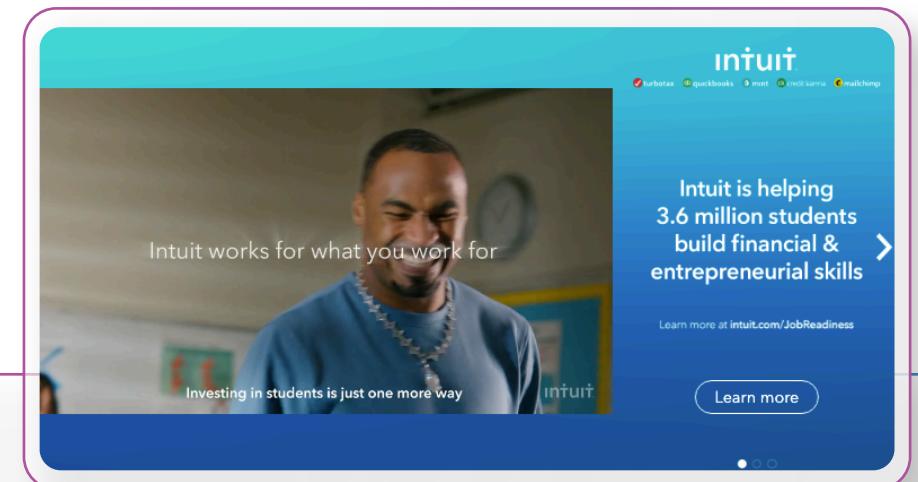
SEIZE THE MEMES.

Thanks to the likes of TikTok and Instagram Reels, when something unexpected happens during a live sports event, the world knows about it—and gets to see it remixed in real time. While some of these viral moments are truly unexpected (nobody planned that [black cat on the field at the Giants-Cowboys game](#)), smart maneuvers from brands can win, too. Just look at what happened during college football's inaugural Pop-Tarts Bowl, where [an oddball edible mascot](#) became the most talked-about moment of the game, taking the showdown between North Carolina State and Kansas State well beyond an audience of fans alone.

The research is clear: Sports fans' media consumption goes far beyond the games,

Fans appreciate when ads incorporate their favorite teams and athletes. With a combination of advanced creative and programmatic ad technology like Infillion's

WHEN SPORTS MERGE WITH BRAND SOCIAL RESPONSIBILITY



According to Infillion's research, 58% of sports fans say that playing sports was a highlight of their childhoods. A commitment to youth sports, or broader youth initiatives supported by pro athletes, can be a real winner for brands looking to reach sports fans in the making.

Infillion helped Intuit create an interactive ad that highlighted NFL wide receiver Robert Woods's advocacy for its job-readiness programs in the L.A. area, tapping into his childhood and early football days in the region. Viewers could learn more about the program than they'd be able to in a traditional TV spot, and could click through to learn more.



FANDOM **360**

Live sports took a blow during the COVID-19 lockdown but emerged from it with record crowds, but with a new challenge: Fans today want live sports to be a full, end-to-end experience, even a multi-day one. There's a fresh new opportunity for retail, hospitality, and travel brands to be part of the always-on sports fan's lifestyle.

“

“[Post-COVID, I’ve] been going to as many games in person as possible.”

– Millennial female, CA

There are few things in life as emotional and visceral as being there in person when your favorite sports team scores a huge win—the collective energy, the roller coaster of anticipation, and the lifelong memories it creates. And this good sentiment translates to the brands that get involved. As we covered in the previous section, over half of sports fans say they appreciate when advertisers sponsor a game, and a similar percentage say they’re more likely to buy products or services that sponsor their favorite teams.

It’s no wonder brands pay enormous sums of money for stadium-naming rights. In 2019, financial services company SoFi paid [a reportedly record-breaking \\$625 million](#) to put its name on the brand-new stadium that the NFL’s Los Angeles Rams and Los Angeles Chargers call home. But that’s a sum that’s out of the question for most brands, and even when it comes to smaller brand buys within a stadium or arena, they’ve traditionally required a full-season or even multi-year sponsorship commitment.



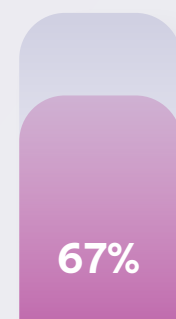
Here, more than anywhere else in the world of sports fandom, COVID-19 upended things. Live sports attendance was banned or heavily restricted for over a year, leaving fans out of a routine, and teams and arenas out of a revenue source. But 62% of sports fans in Infillion’s survey say they’re watching in-person sports as much as or more than they were pre-COVID.

That’s great news. Because sports stadiums are a fantastic place for brands to get visibility—especially among the young audiences whose attention they crave.

Young sports fans’ receptivity to stadium ads



MILLENNIAL SPORTS FANS



GEN-Z SPORTS FANS

Percentage who say they often notice which brands are stadium sponsors

And here’s the even better news: Stadium advertising is more accessible and can produce more ROI than ever before. Thanks to flighted advertising options like Infillion’s InStadium, digital advertising within stadiums can be purchased on a flighted basis. That opens it up to brands **who don’t want to—or can’t—commit to a longer term sponsorship. This is particularly amplified in verticals like entertainment, where film and television studios are only looking to promote a specific movie or TV show in the weeks leading up to release. Campaigns are also now able to be much more targeted around a particular date like Halloween or tax day.**

Plus, digital out-of-home in stadiums can be configured to be visible on TV broadcasts, opening unique creative up to more exposure. For truly unique activations during halftime or game breaks, advertisers can strategically place brand ambassadors or social media influencers in the stadium to capture footage and post it for potentially millions of additional exposures.

LIVE SPORTS IS A LIFESTYLE

Infillion’s research picked up on another rising opportunity for brands targeting in-person sports audiences: the whole game day, not just the game. Tailgating at a sports arena on the outskirts of town, surrounded by little more than an enormous parking lot, is no longer the norm. Many newer arenas now anchor planned walkable neighborhoods that contain restaurants, bars, shopping, hotels, and even residential and office space. Atlanta’s Battery development surrounds the MLB’s Braves’ new Truist Park, and the New York Mets’ Citi Field may soon be surrounded by [a similar hospitality and entertainment complex](#).

This isn’t just a real estate developer’s push. Fans, especially younger ones, want a live sports outing to be a multi-stop affair, which creates real demand for these stadium-centric complexes, or “[adult playgrounds](#),” as Axios called them. Infillion’s research backs this up, and brands should take note.

What do fans enjoy doing before and after a game? Here are the percentages who said they’re “very or extremely likely” to do the following.

SPORTS FANS OVERALL	BEFORE A GAME	AFTER A GAME
GO TO A BAR	46%	47%
GET FAST FOOD	58%	60%
GET A SIT-DOWN MEAL	57%	54%
GO SHOPPING	37%	30%

MILLENNIAL SPORTS FANS	BEFORE A GAME	AFTER A GAME
GO TO A BAR	61%	60%
GET FAST FOOD	65%	71%
GET A SIT-DOWN MEAL	67%	66%
GO SHOPPING	50%	40%

GEN-Z SPORTS FANS	BEFORE A GAME	AFTER A GAME
GO TO A BAR	58%	63%
GET FAST FOOD	78%	83%
GET A SIT-DOWN MEAL	72%	70%
GO SHOPPING	58%	53%



Sports fans’ media consumption—especially that of younger fans—now includes a multimedia diet of recaps, podcasts, fantasy leagues, and social media content. Similarly, their live sports attendance has now become an outing that includes bar and restaurant visits, and even shopping, potentially both before and after the game. This is a key learning for retail, food and beverage, and hospitality brands, particularly those whose products and services are available within walking distance of sports venues and could benefit from geolocation and dynamic messaging on game day.

SPORTS TOURISM: THE NEXT FRONTIER

Sports team fandoms are increasingly no longer confined to hometowns, media markets, or even national borders. When Infillion asked the sports fans in our survey to name their favorite teams, soccer franchises based in Europe and the U.K.—Chelsea FC, Real Madrid, Bayern München, and Arsenal were among the top picks—regularly popped up, alongside hometown NFL and NBA teams. Argentinian superstar soccer player Lionel Messi’s move to MLS’ Inter Miami CF has given the team a footprint far outside southern Florida.

Infillion’s research found that American sports fans are increasingly willing to travel long distances to watch their favorite teams play, including internationally, whether they’re following their favorite NFL team to a game in Frankfurt or flying to the U.K. to see Chelsea FC play in person.

How many sports fans say they’d be “very or extremely willing” to travel to watch a big game or tournament in person?

	SPORTS FANS OVERALL	MILLENNIAL SPORTS FANS	GEN-Z SPORTS FANS
REGIONALLY (UNDER 100 MILES)	60%	69%	77%
NATIONALLY (100+ MILES, WITHIN THE U.S.)	34%	43%	48%
INTERNATIONALLY	26%	35%	47%

This obviously has big implications for travel and tourism brands looking to market to American sports fans open to the idea of taking a trip across the country or abroad. Indeed, these numbers back up a few emerging trends:

American sports go global.

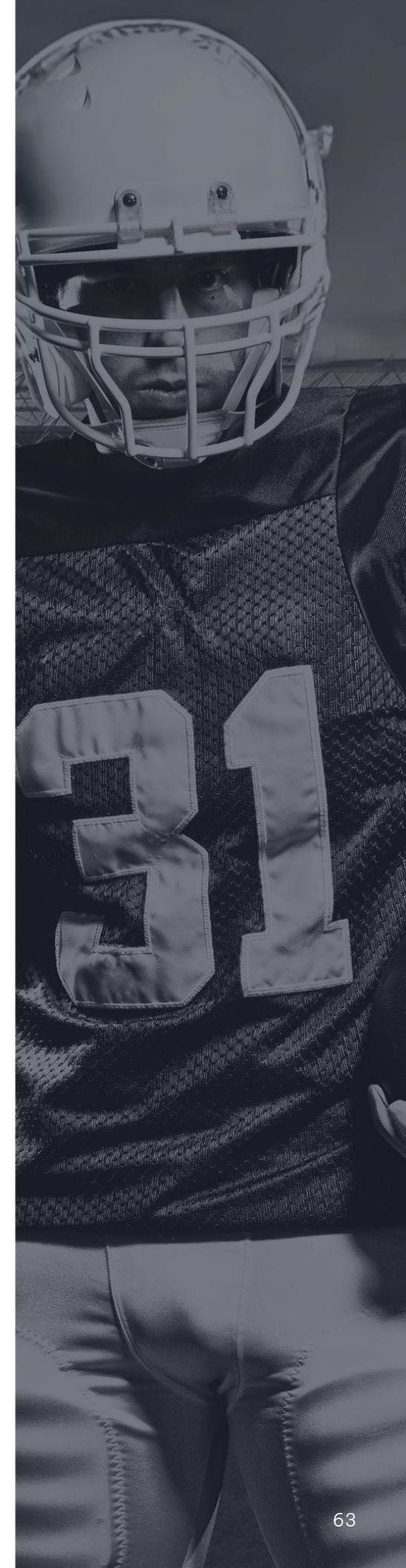
American pro sports have been turning to global audiences to fuel their growth. The NFL [announced in December 2023](#) that it would be doubling the number of games played outside the U.S. from four to eight, and brands are already getting in on the action. Jameson Whiskey [ran a campaign](#) with former quarterback Ryan Fitzpatrick to petition the NFL to schedule a game in Dublin. In the NBA, the Brooklyn Nets' overseas games have given them an enormous international fan base, [particularly in France](#), where the team's NBA Global Game in January 2024 against the Cleveland Cavaliers was accompanied by a Brooklyn pizza pop-up and a Notorious B.I.G. tribute concert. (It doesn't hurt that ["très Brooklyn"](#) emerged as a slang term for "cool" in France a decade ago.)

Some diehard American fans are following their favorite teams abroad. Tanya Giles, a hardcore Buffalo Bills supporter, flew to London to see the team play an international game. "It was incredible how the Bills fans came out in full force, with gatherings at The Admiralty each night. And the energy and excitement walking from the station to the stadium was phenomenal. The overflow of partying in the pubs and streets was the perfect substitute for a traditional Bills tailgate, complete with multiple rounds of the Bills Shout song." Knowing how legendary Bills tailgates are, that's saying something.

Bucket list experiences.

Apple TV+'s soccer-themed hit *Ted Lasso* is [credited with supercharging soccer's rise](#) among U.S. sports fans—and a boost in tourism for Richmond, the quiet London borough where the show takes place. But before the show had even premiered, [British tourism agency VisitBritain found](#) that international trips to the U.K. that included watching a live soccer match were up 66% since 2011. Wisely, [Apple TV+ picked up the rights](#) to Major League Soccer's MLS Season Pass programming in 2023, just as *Ted Lasso* ended its run.

Don Steele, a New York City-based superfan of North London's Arsenal FC, has taken three trips across the pond primarily to see the soccer (er, football) team play. "As special as the games are, there is something magical about the walk from a tube stop to a stadium with the other fans, walking by (and going into) the pubs along the walk, buying scarves that relate to the team's histories, and of course hearing songs you can only faintly understand on TV," Steele explains. "The atmosphere is truly second to none and I always feel uplifted by the experience."



This, once again, is a trend that is more pronounced in younger viewers. Nearly half of Gen-Z sports fans say they'd be down to travel abroad to watch their favorite team play. Gen-Z trend expert Casey Lewis weighs in: "We know young people are spending more on experiences than things. I think part of that is wanting to experience something in real-time with others. A lesser but still significant part of that is being able to flex about your in-person experiences on social media—doing cool stuff makes for compelling social content."

Vegas bets big on sports.

Las Vegas didn't even have a professional sports team a decade ago. Now, it has representation in the NHL, NFL, and WNBA, with an MLB team arriving in 2025, and has looked to sports tourism for big events like the Formula 1 Grand Prix and Super Bowl LVIII as major economic drivers. The city's tourism board [has officially changed](#) its slogan from "The Entertainment Capital of the World" to "The Sports and Entertainment Capital of the World." It's telling that a resort city dependent on tourist dollars sees sports as its next big thing.



FANDOM 360: THE ADVERTISER'S PLAYBOOK

ADVERTISE OUTSIDE THE BOX, WHILE INSIDE THE STADIUM.

Infillion's InStadium has access to ad inventory in 97% of pro and college sports facilities in the U.S. and can bring flighted ad campaigns to life, ranging from 3D video in the arena to augmented reality on the JumboTron. With these immersive campaigns potentially available to TV broadcast viewers or strategically shared after the fact on social media, the audiences can be orders of magnitude larger than that of a sold-out game.

SUPPLEMENT STADIUM CAMPAIGNS WITH GEOLOCATION POWER.

Advertisers can easily reach fans in a privacy-safe way when they're in a stadium, near a stadium, or show patterns of regularly going to games. Infillion's geolocation data can even use this to supplement InStadium ad campaigns to later retarget fans who've seen out-of-home or digital activations while at games.

THINK OF SPORTS FANS AS FAR MORE THAN LOCAL CUSTOMERS.

Stadium advertising used to target an audience that was reliably local. Now, fans—particularly younger ones—are increasingly interested in making their sports obsessions national or global. And game highlights, including branded ones (hello, Pop-Tarts), have the potential to go viral in postgame, short-form content in recaps, and on social media. Brands that never thought there would be a fit for them on the field can now reap the benefits of a more mobile, global, tech-savvy, always-on sports fan base that increasingly sees fandom as a lifestyle that keeps going long after the game has ended, and well past the confines of their hometown or media market.

Sports stadiums have been investing in improved technology to animate player introductions, scores, and, yes, even ads.

When users opt to share their location data, either as part of a team's ticketing app or through other avenues,

Stadium advertising used to target an audience that was reliably local. Now, fans—particularly younger ones—are increasingly interested in

AN ICE-SHATTERING SUCCESS



Infillion's promotion for Netflix's *Sonic Prime* series took to NHL arenas with a 3D visual extravaganza that brought the well-known cartoon character Sonic the Hedgehog directly to the ice, with social media influencers placed in the stands to share the experience far and wide. The cutting-edge activation won the out-of-home categories at the 2023 Creative Media Awards and ThinkLA IDEA Awards.

WINNING SPORTS FANS WITH THE INFILLION PLAYBOOK

Sports fans are more diverse than ever before, and so are their media habits—and for marketers, that can make reaching them seem more complicated than the rules of NBA free agency. That's where Infillion comes in. Our bespoke media solutions can help you reach any kind of sports fan, from lifelong soccer enthusiasts to newly minted NFL Swifties. Here's how we do it.

THE MOST DYNAMIC AUDIENCES IMAGINABLE.

Sports fans' preferences and habits can change quickly—whether a favorite team has made the playoffs or whether a particular sport is in season can dictate their viewing habits, paid streaming subscriptions, what neighborhoods they're spending time in, and use of sports-related apps and news sites. Infillion's dynamic, first-party targeting, which makes use of flexible survey data and geolocation, can make sure that fans are being targeted by their preferences right now, not by rigid and outdated intelligence.



FRONT-AND-CENTER BRAND EXPERIENCES IN LIVE VENUES.

Live stadium audiences offer premium, rapt attention—and fans, especially younger ones, say they appreciate seeing brands support their favorite teams. With access to 97% of pro and college sports arenas, Infillion's InStadium can put your brand front and center, with everything from static billboards to immersive sight-and-sound experiences during breaks. Our Creative Studio can talk you through all the possibilities and identify the arenas with the tech capacity to bring first-to-market innovations to life. Plus, use Infillion's geofencing to retarget audiences who have visited those arenas and seen your brand's activations.



FEWER ADS. BETTER BRAND LIFT. MORE TIME WATCHING THE GAME.

Sports fans made it clear in our research: Ad breaks can easily be interruptive and irritating. But with Infillion's TrueX ads, viewers can opt into engaging with an interactive ad unit in lieu of traditional commercial breaks, saving them time that they'd otherwise spend watching video ads. If you're specifically aiming to engage sports fans and are looking for a brand experience they'll love, you can even make your ad take the form of a game or race—the sky's the limit.

SCALE FOR TODAY'S ALWAYS-ON SPORTS FAN.

Infillion's premium advertising and choice inventory are supercharged with the addition of MediaMath, the industry's most advanced programmatic DSP technology. With MediaMath, reach sports fans across the apps, content outlets, and devices where they engage with media ranging from podcasts to fantasy sports news and more. Build custom audiences and reach them efficiently, with the impactful creative that Infillion does best.

Start planning your sports marketing playbook. Learn more and reach out to us at infillion.com.

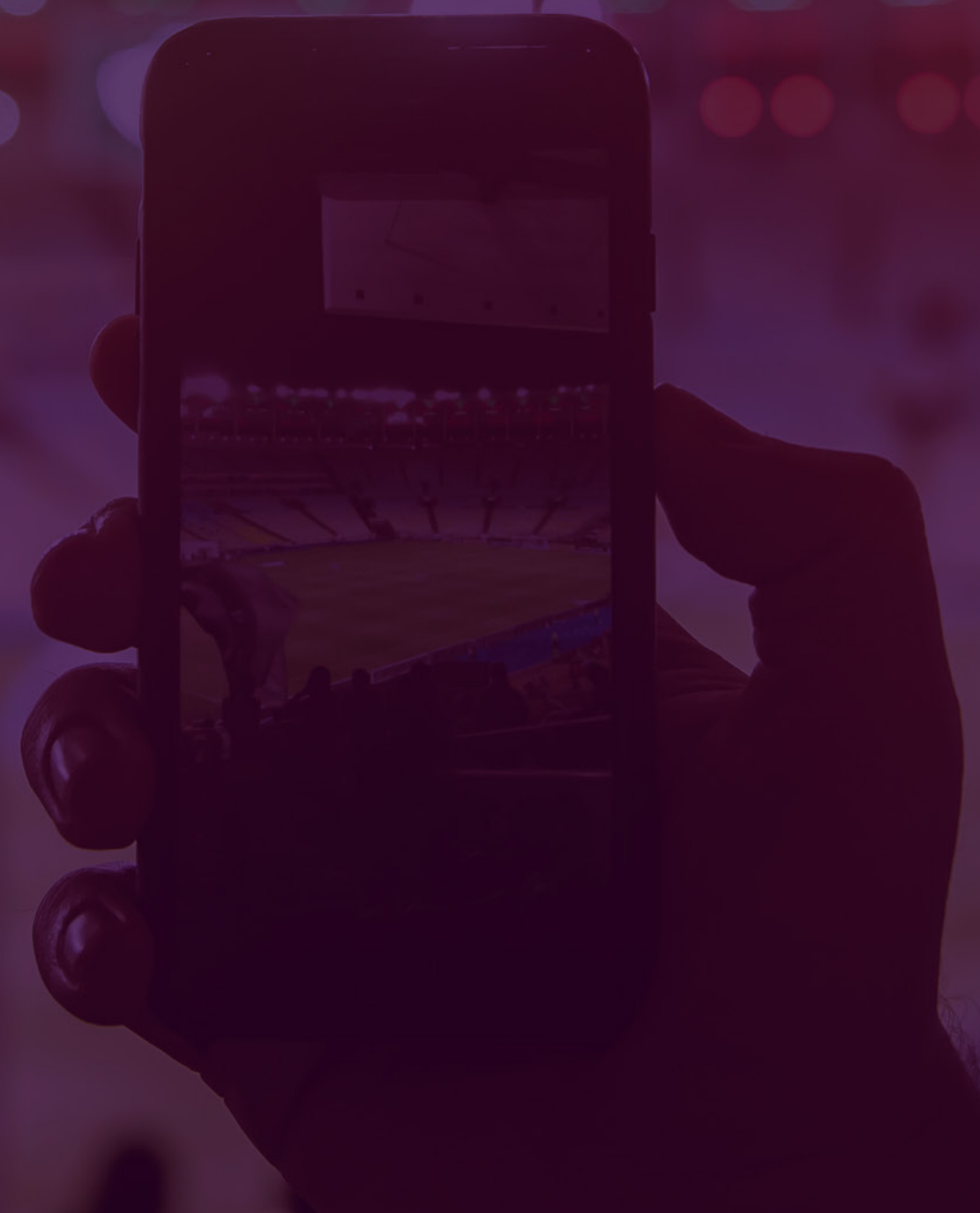


ABOUT INFILLION

Infillion is an advertising technology and solutions company that has built the most advanced media-buying platform in the digital advertising industry—offering CTV, value exchange products including TrueX, premium rich media and display, live fan experiences, location technology, and first-party data via its Gimbal commerce business.

Infillion's advertising solutions offer unparalleled engagement and scale, premium inventory, award-winning creative, and superior targeting and measurement, all unconstrained by walled gardens. Infillion's mission is to improve user experiences and provide high-attention ad formats and services that respect consumers' time, attention, and privacy.

Learn more at infillion.com





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