



THE NEW SPORTS FAN

Consumer Research for the Fast and Curious





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- Brand lift measurement
- Market research
- Content strategy
- Research operations



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Gen Z doesn't care about sports. That's part of a bigger problem.

As Gen Z spends an increasing amount of time tuned into our digital lives, many of us lose sight of the traditional forms of community that previous generations relied on.

[Dace Potas](#) USA TODAY

Sports betting boom fuels concerns over problem gambling | 60 Minutes

There's been a surge of young problem gamblers since sports betting was legalized. An addiction therapist warns AI-powered sports betting has spurred a public health emergency.

JUN 30, 2024

The Taylor Swift effect and the sudden surge in female NFL fans



CNN's Anna Coren speaks with CNN Sports Analyst Christine Brennan about Taylor Swift's effect on the surge in female NFL fans

Did You Know?

- Women are **21% more likely** than men to watch the Olympics Games
- When asked to name the sports they enjoy watching, Gen Z sports fans ranked combat sports like **boxing** and **MMA** higher than any other sport, except NFL football and NBA basketball
- Nearly a third of sports fans say they've canceled a streaming subscription **because of a change in the live sports programming**. For Gen Z, it's almost half!
- Nearly half of sports fans are **willing to travel internationally** to watch their favorite sports teams at a live game or event

Sports Study Methodology



[Download the playbook here!](#)

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 audiences 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 12/11/23 to 12/18/23, yielding a sample of 979 respondents after adjusting for response quality.



Qualitative research, simplified.

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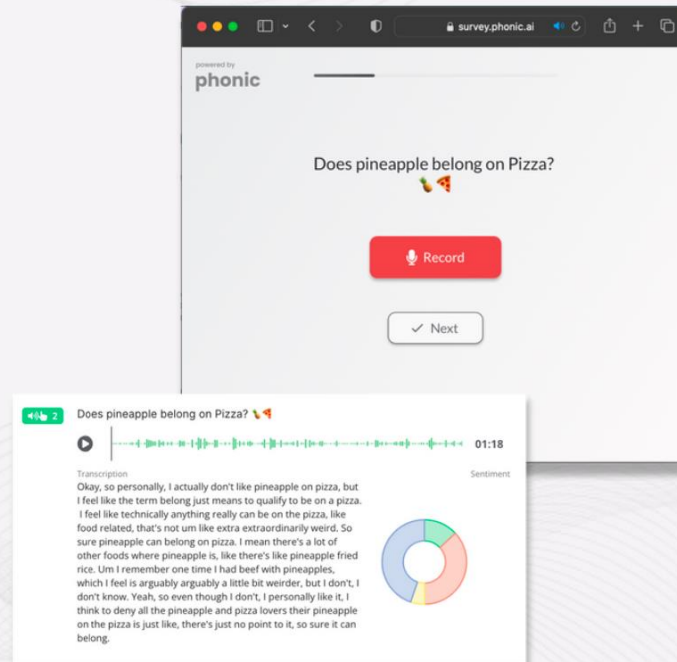
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- ✓ **Cross-tab analytics**



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<https://phonic.ai>

AUDIENCE SEGMENTATION

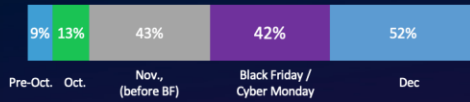
ANXIOUS ALEX

Feels stressed, anxious, and overwhelmed by the task of holiday shopping. They seek a convenient, cost-effective experience that minimizes hassle.

SEGMENT SHARE
36%

SEGMENT SIZE
52 M

SHOPPING TIMELINE



- 65% will do most or all of their holiday shopping online
- 33% shop using loyalty or reward programs to save money
- 30% plan to spend \$500+ on holiday gifts this year
- 6% agree that "Holiday shopping is fun"

ATTITUDES & BEHAVIORS



INTENDED RETAILERS



TARGETING & MESSAGING

Location targeting: Established, big box retail stores with wide range of gift options

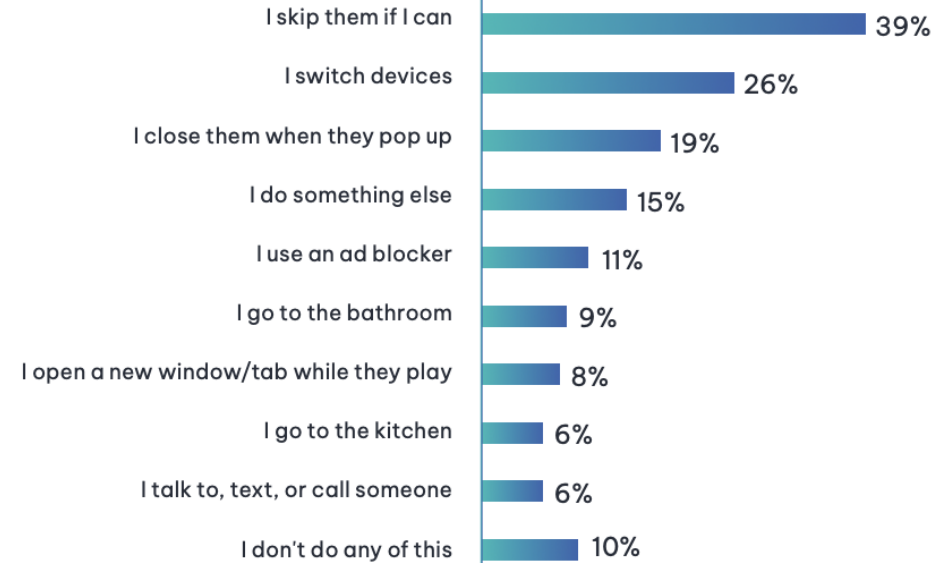
Timing: This group procrastinates big-time; target them during the back half of the holiday season

Messaging: Emphasize ease and convenience. Highlight "one-stop-shop" messages, "one-click order" capabilities, and stress the availability of gift guides or curated lists

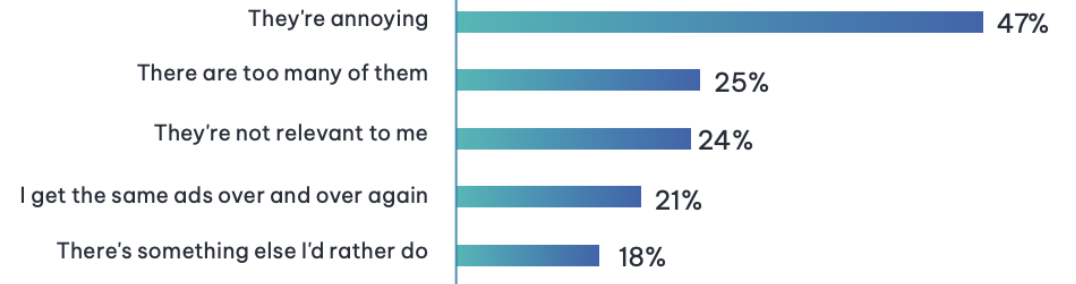
Offers: Promote gift cards, all-in-one packages, and bundling deals that can ease the perceived burden of shopping

CONSUMER TRENDS

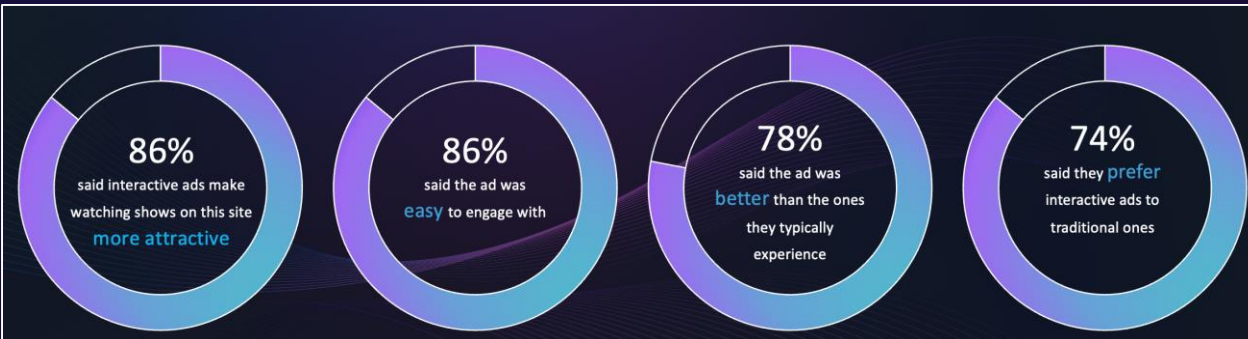
When using your phone, laptop, or TV, how do you typically avoid ads?



Why do you avoid ads?

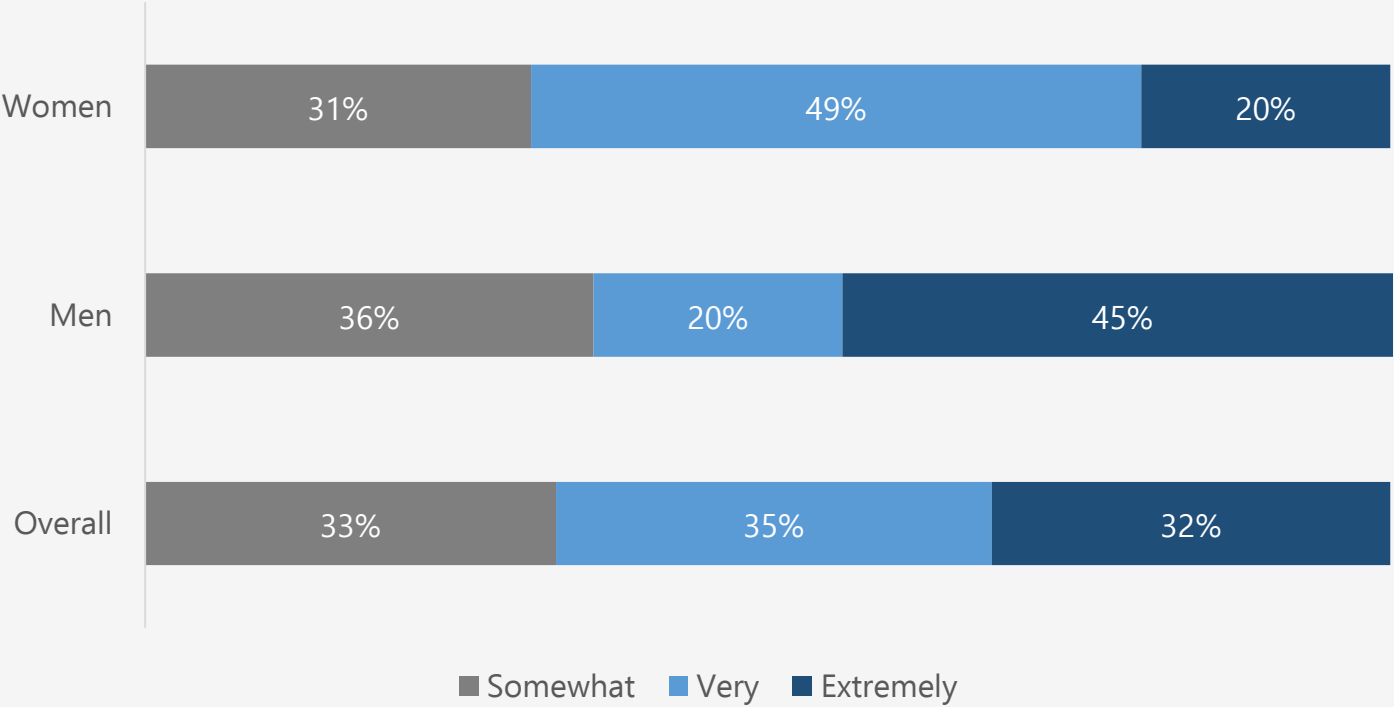


UX RESEARCH



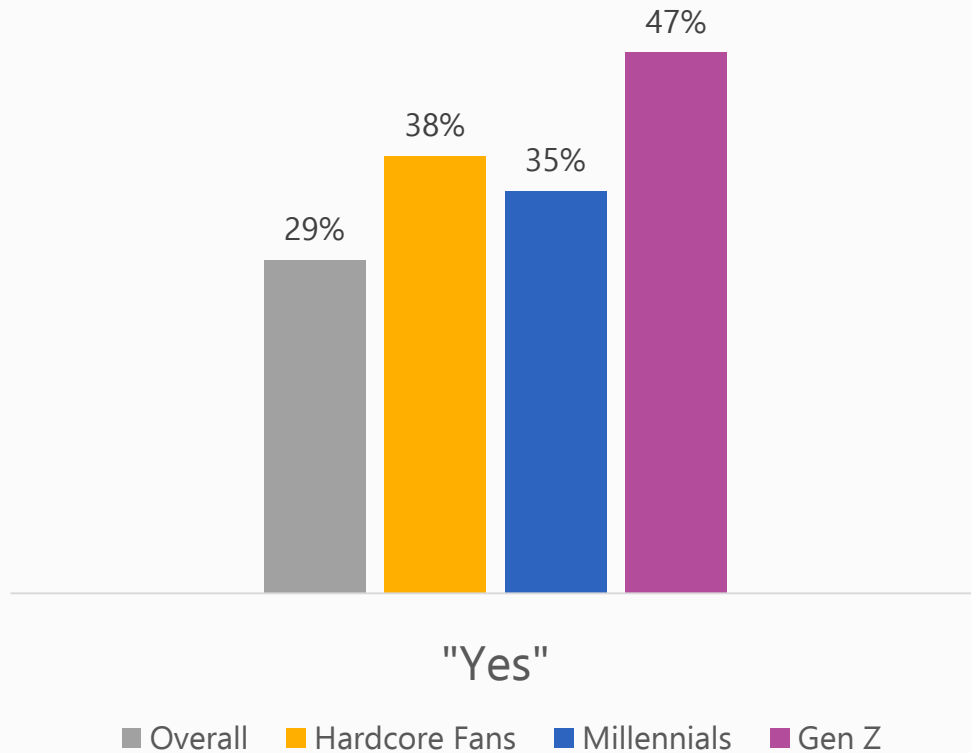
Lesson 1: Let fans self-identify

How interested are you in sports?

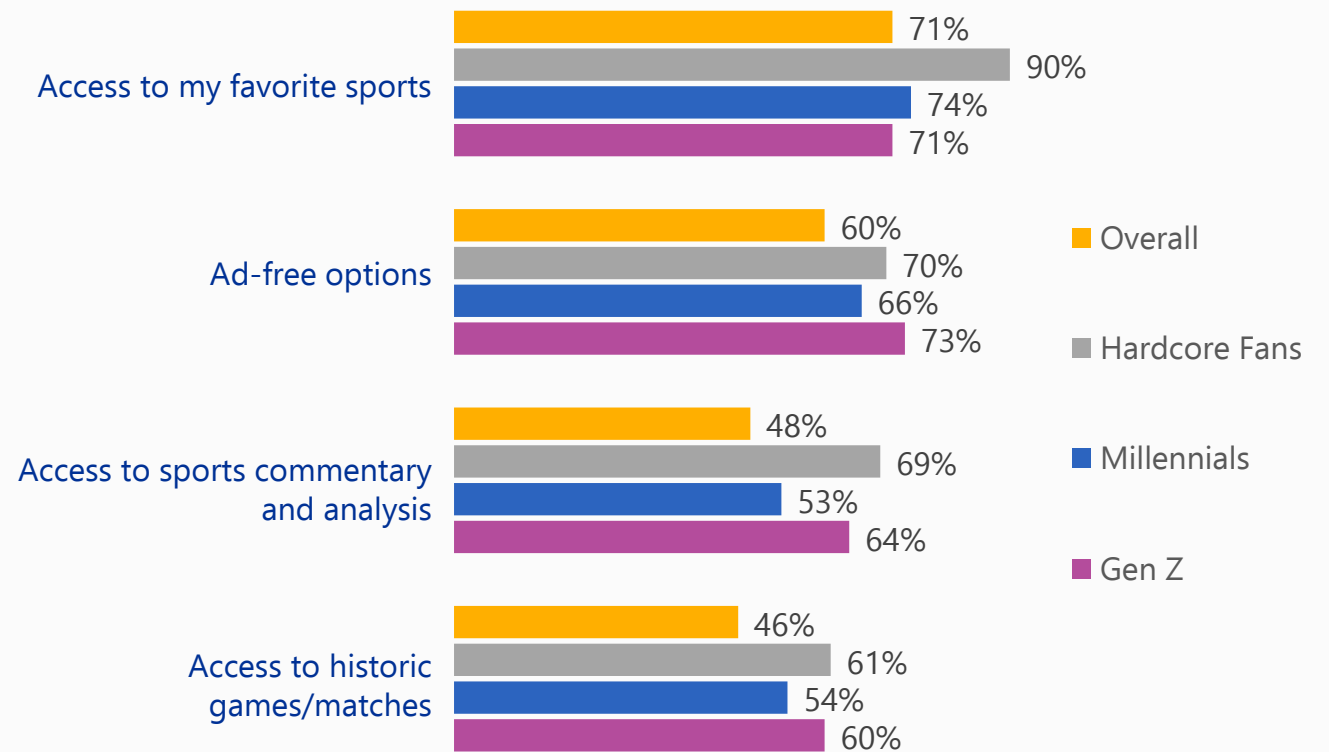


Lesson 2: Stay Agile

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



When deciding which streaming service(s) to subscribe to, how important are each of the following factors?



Lesson 2: Stay Agile

Week 24

Uncertainty About The Future By Age

Adults 18-24 and 25-34 have gained some confidence about the future since last week, registering drops in skepticism. However, adults 35+ have seen a 7-point increase in those "not very" or "not at all" confident things are returning to normal

How confident are you that things will be normal a month from now?
(Not Very/Not At All Confident by Age Segments)



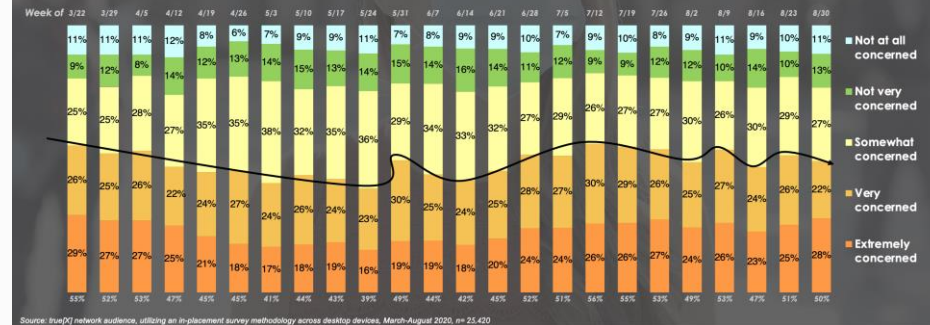
Source: TrueD network audience, utilizing an in-placement survey methodology across desktop devices, March-August 2020, n= 25,420

Week 24

Concern About Healthy Communities

About half of respondents are currently "very" or "extremely" concerned, which is a modest but statistically significant increase since two weeks ago

How are you feeling today about the health of your community?



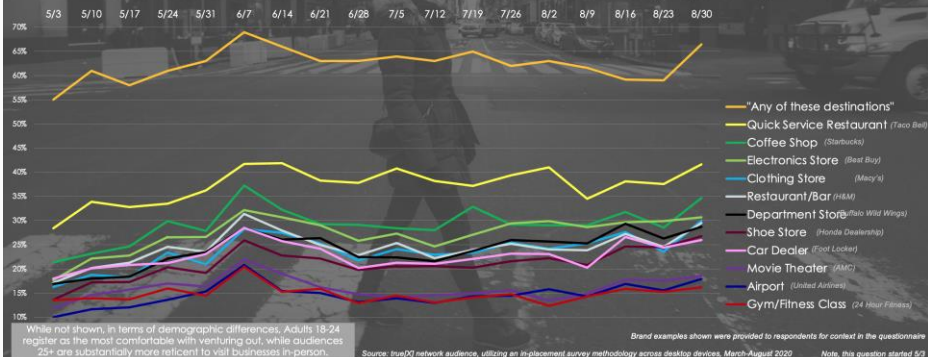
Source: TrueD network audience, utilizing an in-placement survey methodology across desktop devices, March-August 2020, n= 25,420

Week 24

Consumer Comfort with Venturing Out

Two thirds of consumers express comfort with visiting popular destinations, a sharp 7-point jump since last week. Eating out continues to rate as the most comfortable, followed by shopping at stores, while going to an airport, movie theater or gym/class rate much lower comparatively

Please select all the places you would feel very comfortable visiting in person right now.



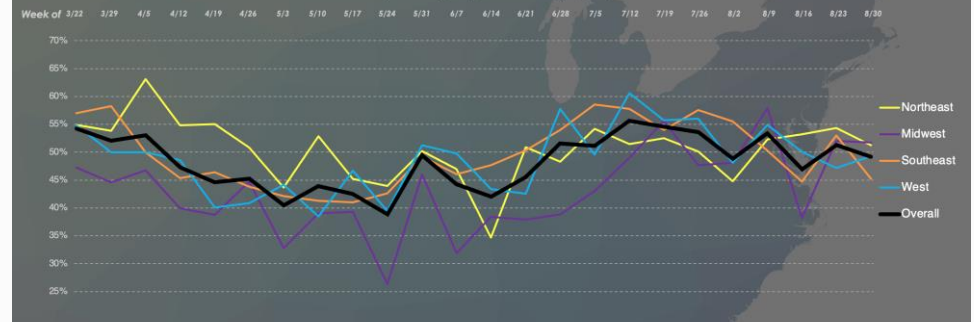
While not shown, in terms of demographic differences, Adults 18-24 register as the most comfortable with venturing out, while audiences 25+ are substantially more reticent to visit businesses in-person. Source: TrueD network audience, utilizing an in-placement survey methodology across desktop devices, March-August 2020. Note, this question started 5/3

Week 24

Concern About Healthy Communities By Region

This week, only the Southeast registered a statistically significant change in community health concern, with a 6-point drop since last week. The remaining regions remained fairly consistent

How are you feeling today about the health of your community?
(Extremely/Very Concerned by Region)



Source: TrueD network audience, utilizing an in-placement survey methodology across desktop devices, March-August 2020, n= 25,420

Lesson 3: Use Qualitative Data Strategically

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

In Conclusion...

- When applicable, give your respondents the opportunity to self-classify
- Stay vigilant! Consumer trends are fickle than ever
- For the most holistic understanding of consumer trends, leverage all types of data: behavioral, demographic, psychographic, qualitative, quantitative
- Use AI to get **closer** to humans, not farther





THANK YOU!

Questions?

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