

Behind The Remote:

A DEEP DIVE INTO SPORTS VIEWERSHIP & FANDOM

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Introduction

Sports have long been considered premium content by publishers, advertisers, and viewers. The premium nature of sports is typically ascribed to the popularity of sports as a genre in American households and the sheer number of eyes on screens. For many advertisers, this extends to the live nature of sports allowing them to reach highly engaged viewers simultaneously. While the shift to streaming has resulted in fragmentation, it has created new opportunities for advertisers to incorporate sports into their buys.


Ultimately, for most fans, sports viewing takes place in the home, where they can control how and where they watch the content they love. This report takes a deep dive into today's connected sports fan, looking at engagement with sports content and how fans are viewing across traditional TV and streaming. It also highlights the value of sports advertising, with considerations for how best to incorporate sports programming into multiscreen TV campaigns to drive effectiveness.





Methodology

This report is primarily based on an online survey of American sports fans commissioned by Comcast Advertising.

 We surveyed **1,000 participants** representative of the adult U.S. population who engaged with any sports content (live game coverage, highlights, sports-related talk shows, etc.) in the past six months. In this report, our total sample is referred to as the “**average fan.**”

Our core fan segments:

Casual fan

Participants who spend 2 hours or less with sports content each week, watch live sports coverage, and do not consider themselves a moderate or super fan of the sports or leagues they typically follow.

Avid fan

Participants who spend 5+ hours with sports content per week, watch live sports coverage, and consider themselves super fans of at least one sport or league that they typically follow.

Niche sports fans

Participants who typically follow sports outside of the ‘Big Four’ - MLB, NBA, NFL or NHL - including regular season and tentpole events, though their levels of fandom vary.



A LOOK AT U.S. SPORTS FANS

For U.S. viewers, it's all eyes on sports

3.2

hours spent watching sports content weekly¹

69%

of Americans engage with sports content outside of the game (talk shows, social media, etc.)¹

90%

of Americans watch sports outside of the 'Big Four' including tentpole and niche sporting events¹

3

different leagues watched on average¹

51%

of Americans rank live sports in their two most watched genres²

84%

watch the 'Big Four' sports¹ (MLB, NBA, NFL or NHL)



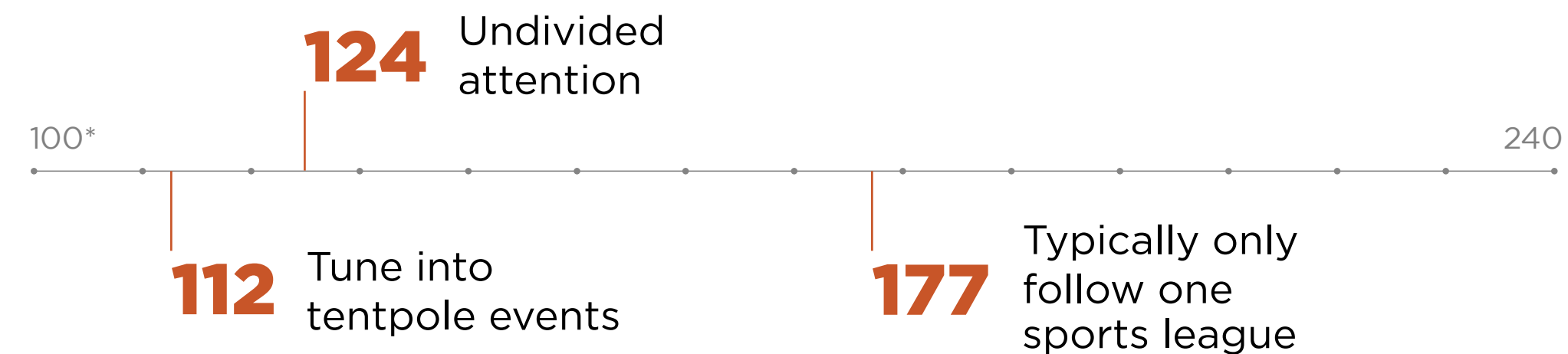
Sources: 1. Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months. 2. Comcast Advertising study in partnership with Cint. Q4 2023, consumer survey responses, N=1500.

While many watch sports, degrees of fandom impact viewing patterns

Casual fans

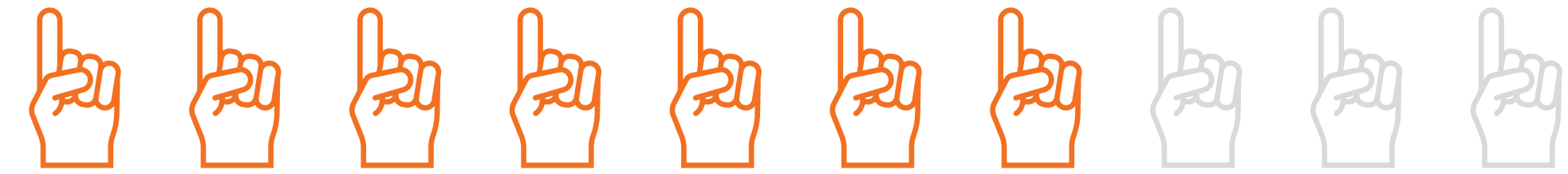
These fans typically only follow one sports league and are drawn to major tentpole events. They are less likely to watch with others and are also the least likely to multitask during the game making them a highly engaged audience.

Casual fans tend to watch fewer sports but give their undivided attention while watching games.



Nearly 7 in 10 fans are niche sports fans

They spend up to 4 hours weekly watching sports and enjoy sports outside of the 'Big Four' like college sports, tennis, and soccer. Since they follow a few leagues, 3 in 5 engage with highlights and rebroadcasts and they are the most likely to have multiple games on at once.



Avid fans

These fans follow multiple sports leagues and most engage with content outside of the game. Many of them view sports as an integral part of their social life and tend to watch games in larger groups.

Avid fans spend a lot of time with sports, consuming many types of sports content.



* 100 index represents the average sports fan
Source: Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months. Big Four = NFL, NBA, MLB & NHL.

Fans are engaging with sports in new ways

With providers creating more immersive viewing experiences such as convenient access to scores and play-by-play analysis, fans are engaging with sports in new ways giving advertisers additional opportunities to reach them



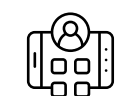
Time to consider the odds

Sports betting is changing how some fans watch sports. **44%** of adults 21+ bet on games* and avid fans are **+37% more likely** to engage in sports betting than the average fan.



Fans are multitasking

Half of fans say they usually have sports on in the background while doing other tasks. Almost **3 in 4 fans** check scores for other games* and 63% scroll on social media while watching the game*. Avid fans are also +38% more likely to have multiple games on at once.



Using technology to enhance the game

Fans crave technology that enhances their game day viewing experiences, particularly real-time stats and analytics. The desire for technology is highest among avid fans, who want customizable camera angles (37%) and the ability to watch with friends and family in virtual rooms (32%).

*Based on answers of at least occasionally
Source: Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months.

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A photograph of two men in a dimly lit bar. They are both looking towards the left of the frame with expressions of intense focus and anticipation. The man in the foreground has his hand near his mouth, while the man behind him has his hand near his chin. The background is blurred, showing warm, glowing lights from the bar.

THE CURRENT SPORTS VIEWING LANDSCAPE



The 'big screen' is central to the fan experience

Fans love watching at home

85% of fans prefer watching live sports on TV rather than in-person.² Over half of Americans say they enjoy watching at home because they can see all aspects of the game better on TV than in person.¹

Sports viewing happens together

83% of fans at least occasionally watch live sports with others.²

73% of fans watch regular season games in groups of 3+ people. This is even greater in households with children and is amplified for playoff or championships.²

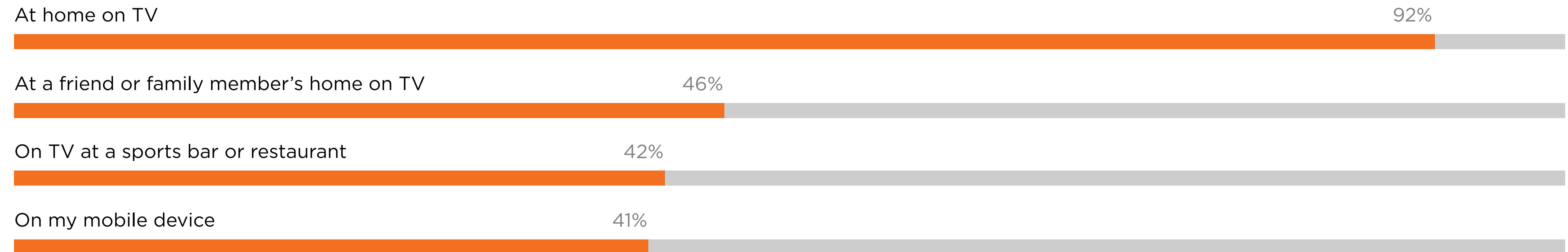
38% of fans say they enjoy watching live sports on TV because sports are an integral part of their social lives.¹

Source: 1. Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months who were satisfied with the current experience of watching live sports through TV coverage. 2. Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months.



Where Fans Watch Live Sports¹

— At least half of the time — Less than half of the time



 Fans are +119% more likely to watch at home than at a restaurant or sports bar.¹

Source: 1. Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months.

With the fragmentation of sports content, viewers have more choice in how they watch

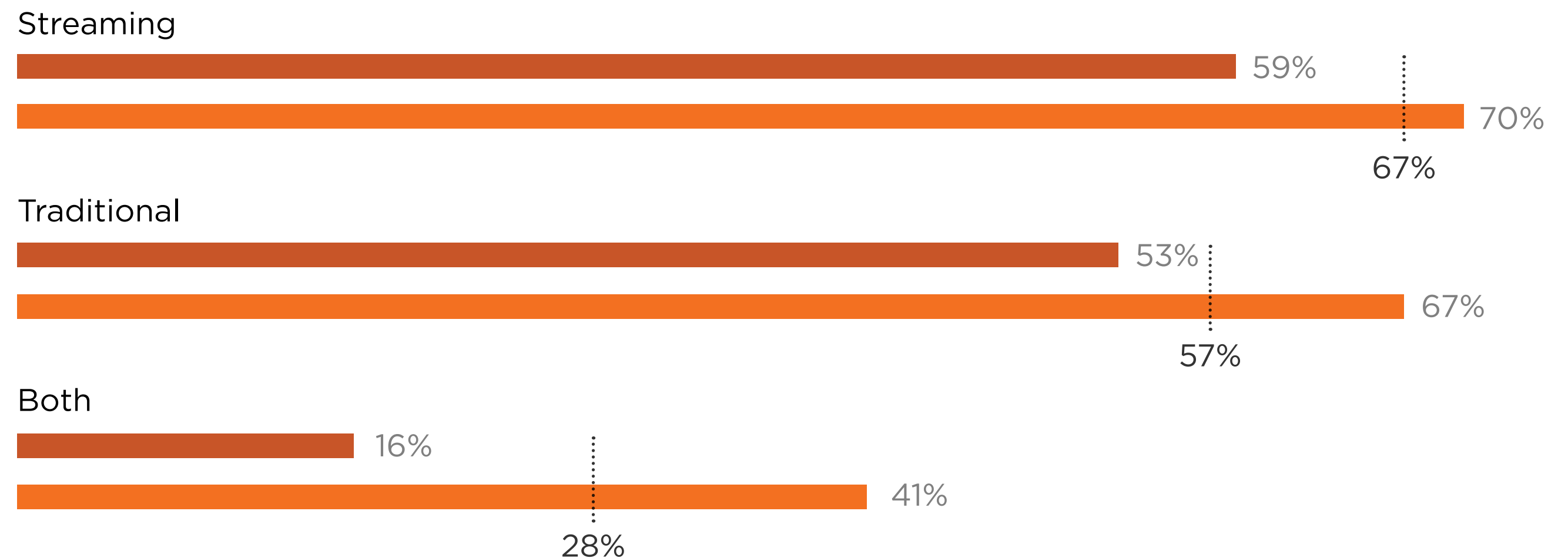
Factors contributing to how fans watch live sports:

- 54%** Ease of finding games
- 49%** Presence of all the games they want to watch
- 49%** Presence of favorite commentator

Overall, **80% of Americans are satisfied with their live sports viewing experience**, regardless of where they watch it (traditional TV or streaming).

How Fans Typically Watch Live Sports on TV

... Average Fan — Casual Fan — Avid Fan





 **46% of fans signed up for a service in the past six months just to watch a specific sport or sporting event.**

Source: Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months. Streaming = Paid Streaming and FAST.



Sports on streaming are a win for fans and advertisers


As viewing habits continue to shift from traditional TV to streaming, live events are following suit. Many sports events are becoming streaming-first, creating opportunities for more advertisers to reach fans via live programming without the same price tag of a Super Bowl commercial.

'FOMO' drives fans to sign up for services

-  Almost half of fans will sign up for a streaming service to watch a specific sport or sporting event.
-  58% of fans that keep the service do so primarily because it is dedicated to a sport that they love

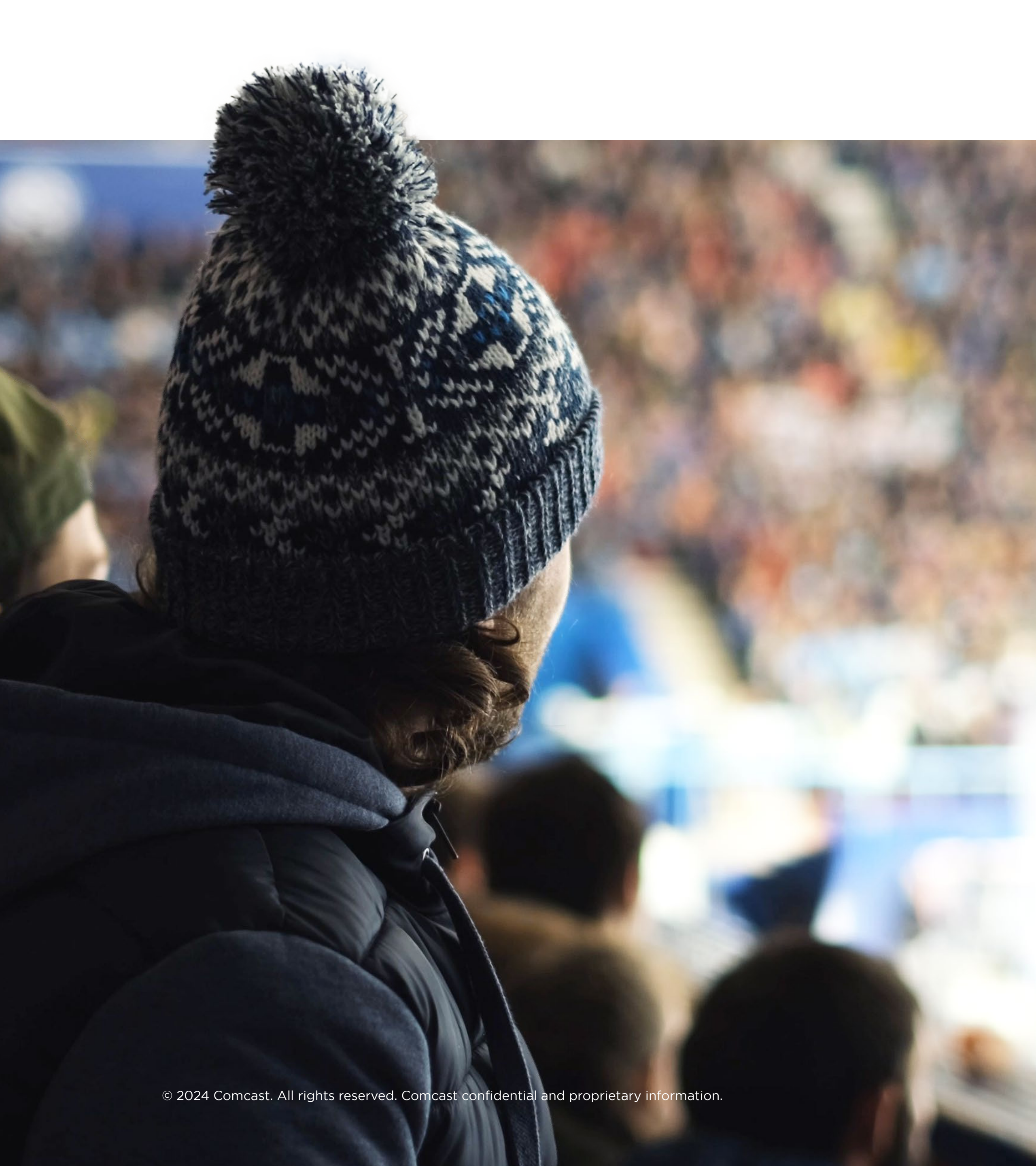
Fans are accustomed to ads in sports

-  Fans who typically watch games on streaming are less likely to view ads as disruptive to the game. In fact, they are more likely than the average fan to agree that the current number of ads is “just about right” (55%*).
-  Avid fans are more open to ads than casual fans and only 45% would pay a premium for an ad-free experience during games on streaming.

 **Avid fans are +31% more likely to subscribe to a streaming service to watch the game than the typical fan.**

*Among fans who typically watch on streaming.
Source: Comcast Advertising Survey, N=1000, April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the P6M.





Fans continue to gravitate to tentpole events, but new viewers help grow fandom

Tentpole events will always draw viewers



Fans are likely to watch **at least one** tentpole event in the next 12 months, such as the Super Bowl, College Football Playoffs, and NBA Finals.¹



Tentpole events also attract communal viewing in larger groups than regular season games, especially in households with children.¹





55% of the most watched sporting events are tentpole events or post-season coverage. Viewers of tentpole events are +10% more likely than viewers of other live sporting events to watch ads, especially those for niche sports.²

Source: 1. Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months. 2. Comscore Program-Based National Ranker.Household Live. January - December 2023. Most watched = Top 100 Sports Telecasts.

Growth is driven by new fans

-  Fans are branching out from the 'Big Four': 1 in 4 sports fans would consider watching soccer in the next twelve months.
-  The popularity of women's sports will continue to grow - 36% of fans who do not currently watch women's sports said they are likely to start in the next 12 months - appealing particularly to avid fans.
-  Better awareness of where or when games are happening (32%) and improved access to live coverage through current subscriptions (30%) will increase fan interest in a new sport, ultimately increasing viewership.

Women pave the way

-  An often-overlooked demographic, 82% of female fans spend up to 4 hours weekly watching sports content.
-  Women are more likely than men to give their undivided attention to the game and, like men, they enjoy the rollercoaster of emotions when watching live sports.

 **Fans are +36% more likely to consider watching at least one non-Big Four sport in the next twelve months.**

Source: 1. Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months.



A woman with dark hair tied back, wearing glasses and a red and white striped shirt, is sitting on a blue couch. She is holding a green mug with both hands and looking off to the side with a slight smile. The background is a blurred indoor setting with warm lighting.

THE POWER OF SPORTS ADVERTISING



Emotional attachment to sports creates value for advertisers

The emotional connection between sports fans and their favorite teams or players should not be discounted. This emotional attachment to sports creates value for associated brands as emotions are known to drive engagement, cultivate positive brand sentiment, and lead to conversions.¹

Emotions help advertising convert at higher rates

Research from Mediaprobe found that there is a positive relationship between emotional engagement and brand memorability, with stronger benefits for advertisers from premium content. Peak engagement is highest in sports content, making it particularly valuable for advertisers.¹ Contextual advertising - advertising relevant to the content - tends to have higher emotional engagement and most fans prefer ads that are related or complementary to the sport they are watching.^{1,2}

Sports fans are loyal

69% will watch until the end of the game even if the team they are rooting for is losing.²



Avid fans are +16% more likely than the average fan to be loyal for the full game.

Source: 1. Mediaprobe. Determining The Value of Emotional Engagement to TV. 2024. 2. Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months.

Advertising during sports can give fans a positive perception of brands

Almost half of sports fans have a positive perception of ads shown during game coverage. Among those who find ads disruptive, ad frequency and repetition are the top reasons.¹

Ads shown during live sports are **+47%** more likely to be seen by 2+ people than the average non-sports traditional TV program.²

Fan Perceptions of Ads During Live Games¹

- 57%** I prefer when ads are related to/complement the sport I'm watching
- 52%** I like to see ads for small businesses when watching live sports
- 50%** I can relate to the ads shown during live sports
- 48%** There are just the right amount of ads shown during games
- 41%** I will pay more to not have ads when watching live sports

Source: 1. Comcast Advertising Survey. N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months. Only top 2 boxes shown (indicating view that ads enhance the experience of watching live sports). 2. TVision Program Analysis Time Period Report. 1H 2024. Live Sports= Live + SD on linear only. Non-Sports = Live +7 on linear only. Co-viewing rate is the proportion of viewing where two or more viewers are in the room with the content tuned for a minimum of 2 seconds for commercial time.





Driving results through advertising in sports

Case Study: Value of Sports Advertising¹

At similar investment levels, an auto dealer who aired on sports during March Madness

reached

2.9X

more households

delivered

3.1X

more impressions

than a dealer without sports in their media mix.



46%

of avid fans purchased a product that they saw while watching live sports (vs. 39% of average fans).²



47%


of fans who purchased a product did so because it would enhance their game day viewing experience, with food & beverage being the most popular category.²





Avid fans are +19% more likely to convert than the average sports fan!²

Source: 1. Comcast Aggregated Ad Exposure Data for Auto advertisers in Philadelphia. 3/19/24 – 4/9/24. N=2. 2. Comcast Advertising Survey, N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months.

Things advertisers should consider when planning their sports buys

-  **Don't underestimate the value of the casual fan¹**

While they may spend less time in front of the screen than avid fans, casual fans are the least likely fan segment to multitask while watching games making them a highly engaged audience. Appealing to this fan segment maximizes incremental exposure for advertisers, particularly during tentpole events.
-  **Lean into new opportunities¹**

The increase in live sports and general sports content on streaming presents new opportunities for advertisers as ad inventory expands across streaming. Additionally, growth in interest for niche sports creates new avenues for advertisers with diverse sports strategies to reach incremental audiences.
-  **Optimize ad creative for the audience to drive engagement**

Fans prefer ads related to or that complement the sport they are watching. Contextual advertising improves relevance, engagement, and ultimately ad effectiveness. Accurate representation in advertising also increases engagement among underrepresented groups, such as female fans. Women are the primary decision-makers in most households and are projected to own 75% of discretionary spending by 2028, making them a core demographic to keep engaged during sports advertising.^{2,3}

Source: 1. Comcast Advertising Survey, N=1000. April 2024. Qualifying Criteria: Watched sports content (game, highlights, talk show, etc...) in the past six months. Data shown for viewers who do not typically watch live game coverage. 2. Campbell, C., Sands, S., McFerran, B. et al. (2023). Diversity representation in advertising. Journal of the Academy of Marketing Science. 3. Wise Up to Women, Nielsen, 2022





Conclusion

Sports remain one of the most watched and enjoyed genres in U.S. households and this shows no sign of changing anytime soon. Additionally, sports fans are passionate, and the emotional connection between a fan and their favorite team or sport cultivates loyalty, engagement, and demand for content.

With live events becoming increasingly available on streaming, advertisers have even more opportunity to reach engaged viewers tuned into sports programming.

To capture the full value that sports can offer, advertisers of all sizes should be considering the viewing habits of connected fans to effectively reach them and make positive connections.

The premium nature of sports and the engagement of fans can help ensure advertisers drive awareness and positive associations for their brand whether audiences are watching on traditional TV or streaming. Advertisers should look to a partner that has access to a breadth of sports content and understands how best to incorporate this premium content into multiscreen TV campaigns.

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