



ANALYST REPORT

# The 2026 Sports Marketing Guide

— APRIL 2026



## Executive Summary

The 2026 Sports Marketing Guide is an audience intelligence resource designed to help corporate brands make smarter, more targeted decisions about sports sponsorship and marketing investment.

For brand teams evaluating where to spend sponsorship dollars, the data in this guide enables like-for-like comparisons across properties, surfaces niche audiences, and grounds investment decisions in observed consumer behavior rather than assumed cultural prestige.

Drawing on daily survey data from Morning Consult Intelligence, the report profiles the fan bases of more than a dozen major U.S. and global sports properties.

### **The report is structured around three core questions:**

1. Which sports properties hold the greatest reach and purchasing influence among U.S. adults?
2. Who, specifically, are the fans of each league — and how do they differ from the general population across demographics, psychographics, and consumer behaviors?
3. Where are these fans most reachable?

## Key Takeaways

**For brands seeking scale, the NFL remains unmatched:** The NFL holds a dominant lead as the most-watched sport among U.S. adults and leads on favorability and purchasing consideration.

However, for brands seeking to target differentiated audience composition, other properties may offer better returns:

**The NBA is the strongest property for targeting Gen Z:** The NBA over-indexes dramatically among Gen Z (+12pp) and Millennials (+6pp) as a most-watched sport. The MLS fan base also skews notably younger.

**Formula 1 and European soccer attract upwardly-mobile, digitally-active audiences:** F1 over-indexes among Gen Z, women, and parents as a most-watched sport. Both FIFA and EPL fans skew urban, trend-forward, and are heavy users of social platforms. These fan bases are particularly well-suited for brands in tech, luxury, lifestyle, and global consumer goods categories.

**The WNBA and NASCAR are the most female-skewing fan bases:** No other league draws as high a share of female fans as the WNBA. Its fan base also skews Democratic and urban — a sharp contrast with NASCAR, the second-most female-heavy fanbase, that skews Republican and rural.

**Sports fans over-index heavily on TikTok, Instagram, and Snapchat:**

Fans who follow athletes on social media use TikTok at +31pp over the general population, Instagram at +30pp, and Snapchat at +22pp. Daily sports viewers show similar skews. This signals that sports-adjacent digital placements — particularly short-form video and social commerce — are high-efficiency channels for reaching engaged fans outside of live broadcast environments.

**Fantasy sports participants and live-event attendees represent the**

**most commercially engaged sports fans:** These segments over-index sharply on Millennials, higher incomes, parents, and college education. They are among the most brand-receptive and product-active fan cohorts. Brands whose sponsorships touch live events, DFS platforms, or broadcast integrations can expect disproportionate reach into this high-value segment.

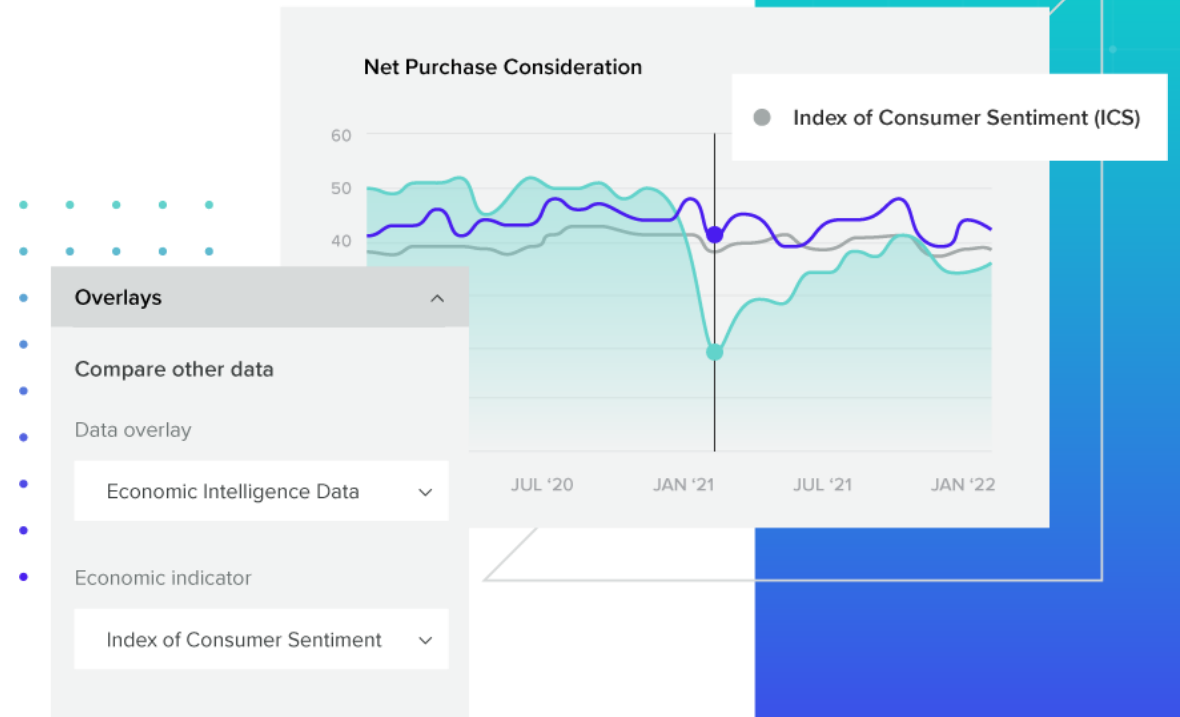
**LIV Golf isn't popular, but it represents the highest-income, highest-**

**status audience of any property:** LIV fans dramatically over-index on premium and digital purchasing, social status aspiration, higher household incomes, homeownership, and married-with-children households. They lean heavily Republican. For luxury, financial services, or aspirational lifestyle brands, LIV offers one of the most concentrated affluent audiences in sports.

# Methodology

Data featured in this report comes from **Morning Consult Intelligence**. The platform helps you understand your audience, brand, competitors and market in a way traditional research companies can't.

- Surveys are conducted daily and results are aggregated on a rolling basis.
- League fan bases are defined as respondents who rate a given league as "Very Favorable" on a 5-point scale. This "hard fan" definition captures people with strong positive affinity rather than casual awareness.
- Data reflects surveys conducted between April 2025–April 2026.
- Percentage point (pp) differences compare a league's fan base to all U.S. adults. Example: if 45% of NBA fans are urban and 33% of all adults are urban, NBA fans are +12pp.

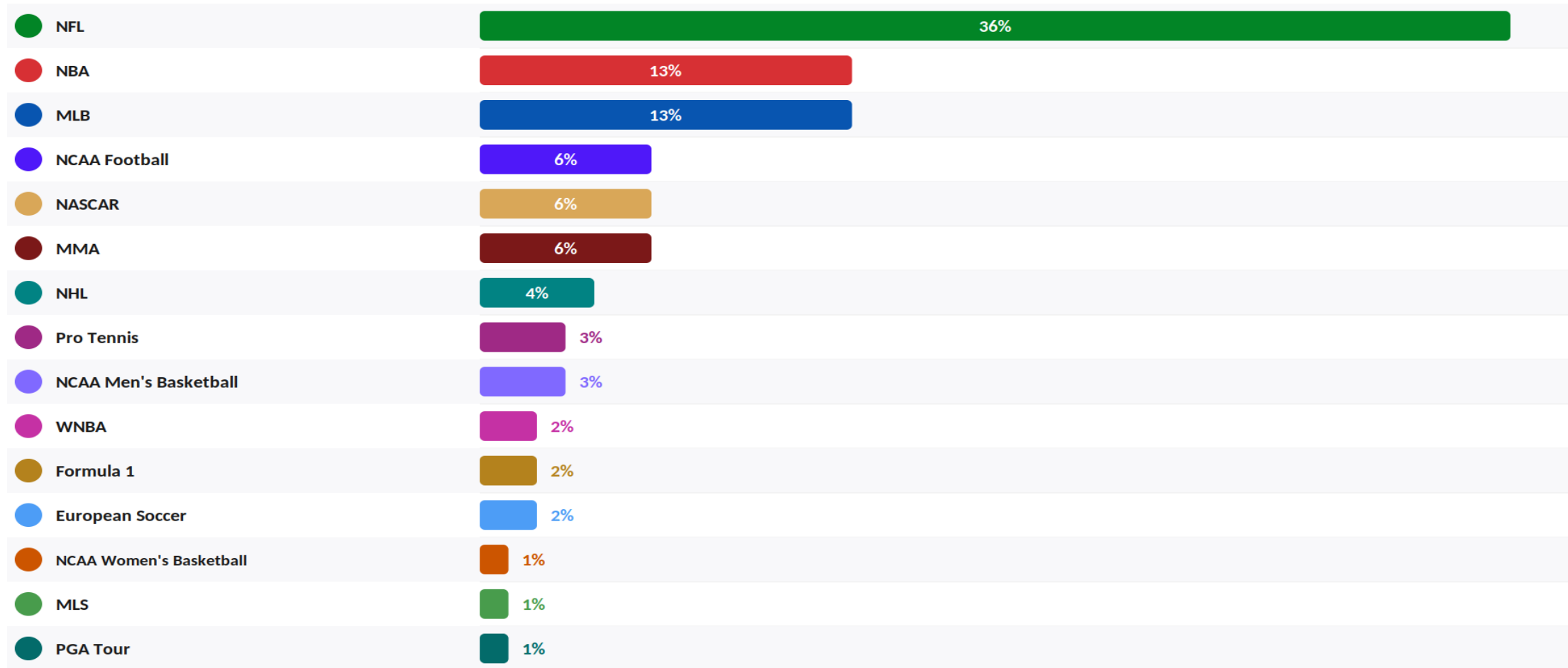




# League Popularity & Reach

## Americans' Most Watched Sport

Share of U.S. adults naming each sport as their most watched; LPGA and NWSL were surveyed but received 0%



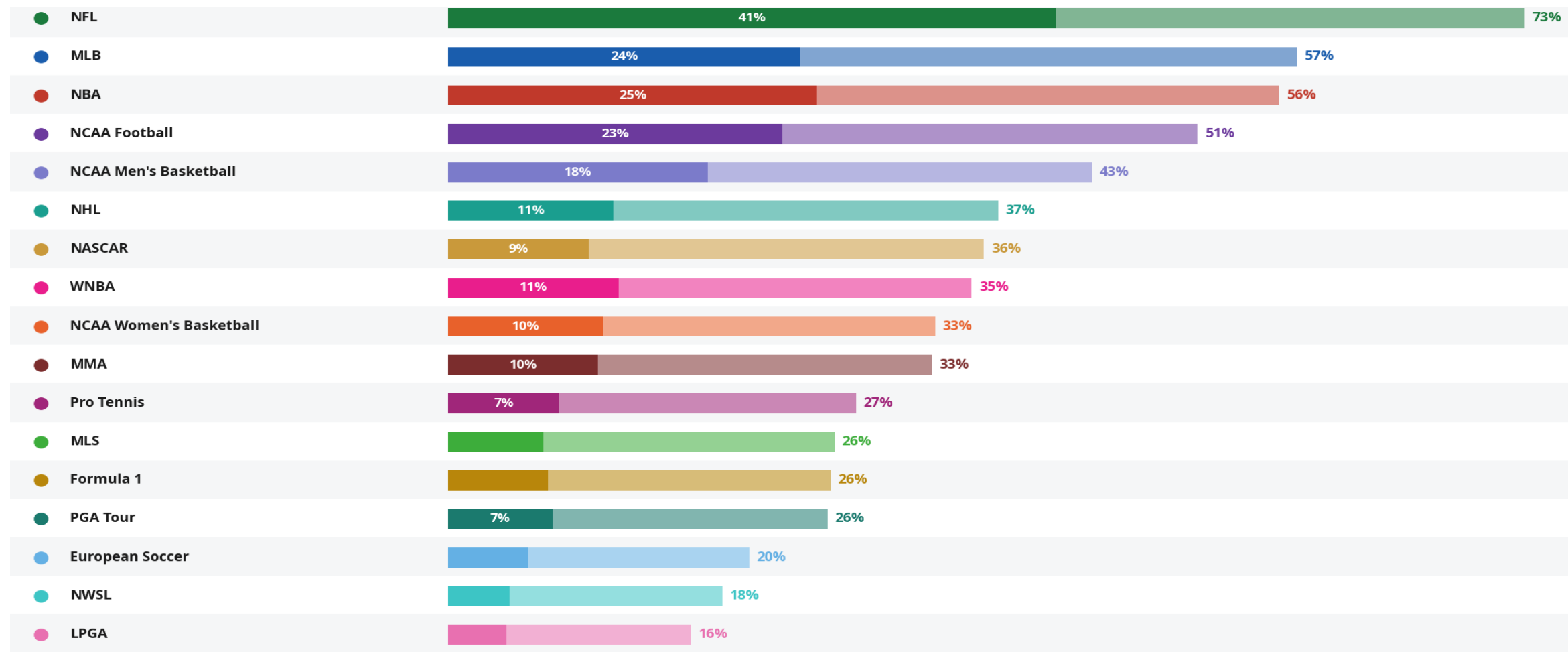
## Most Watched Sport: Over/Under Index Among Key Audiences

Percentage point difference vs. general population | Green = over-indexes, Red = under-indexes

	All adults	Gen Z	Millennials	Women	Parents	Income \$100k+
NFL	36%	-5pp	-2pp	-1pp	-1pp	-4pp
NBA	13%	+12pp	+6pp	-3pp	+6pp	-1pp
MLB	13%	-9pp	-4pp	-1pp	-5pp	+3pp
NCAA Football	6%	-2pp	-1pp	—	—	+2pp
NASCAR	6%	—	-2pp	+2pp	-1pp	-4pp
MMA	6%	+2pp	+2pp	-1pp	+1pp	-4pp
NHL	4%	-1pp	—	—	-1pp	+1pp
Pro Tennis	3%	-1pp	-1pp	+1pp	-1pp	—
NCAA Men's Basketball	3%	-1pp	—	—	—	+1pp
WNBA	2%	+1pp	—	+1pp	—	—
Formula 1	2%	+2pp	+1pp	+1pp	+1pp	—
European Soccer	2%	+2pp	—	—	—	+3pp
NCAA Women's Basketball	1%	+1pp	—	+1pp	—	—
MLS	1%	—	+1pp	+1pp	+1pp	+2pp
PGA Tour	1%	-1pp	—	—	—	+2pp

## League Fandom: Avid vs. Casual Fans

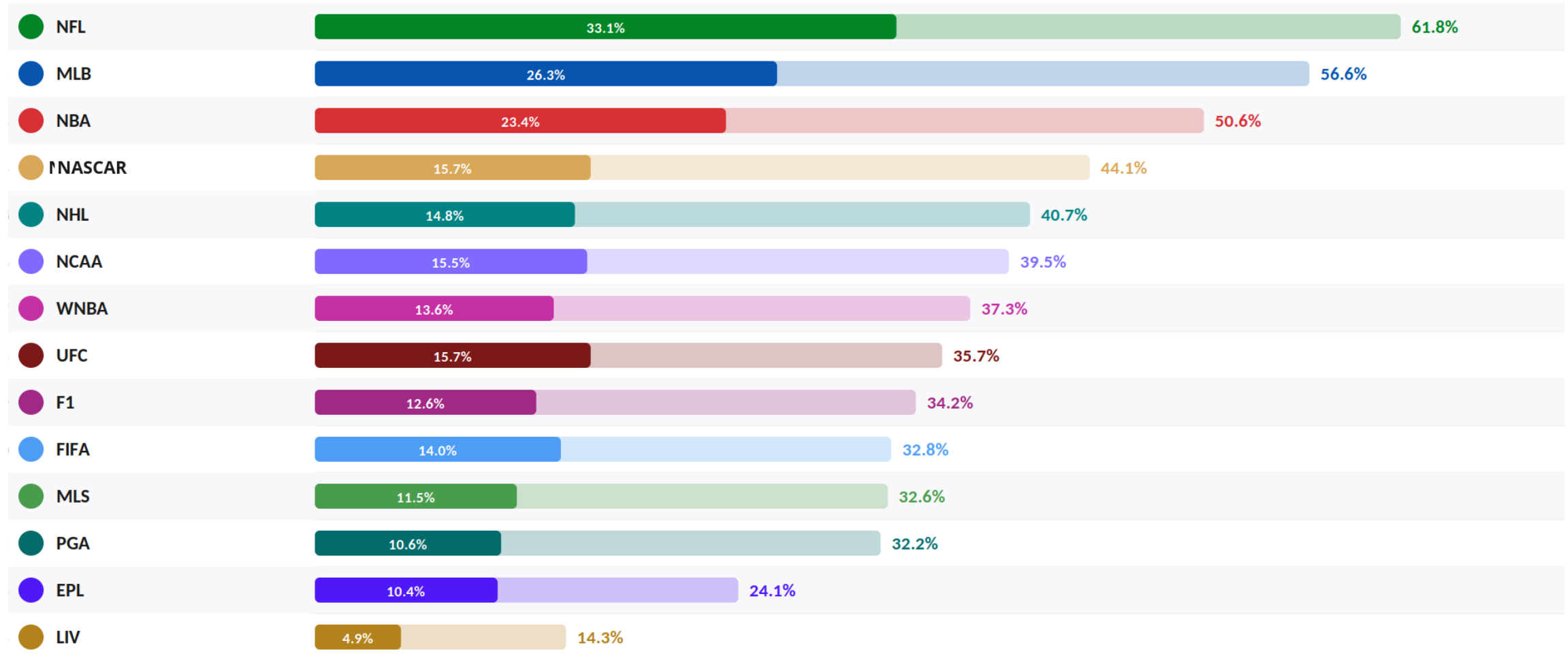
Share of U.S. adults who are avid (dark bars) or casual fans (light bars) of each league



# League Favorability Rankings

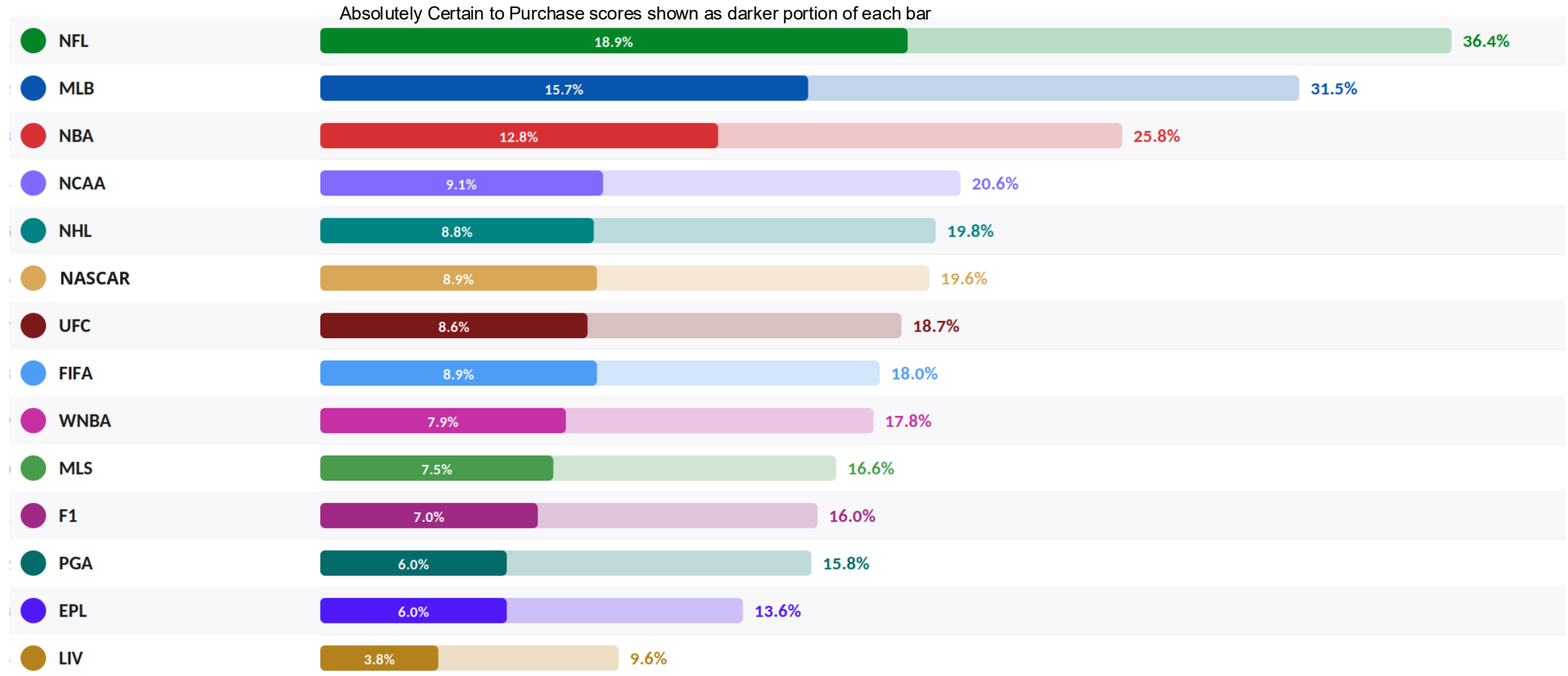
NFL leads on total favorability; UFC has a notably high share of “very favorable” fans

Very Favorable scores shown as darker portion of each bar



# League Purchasing Consideration Rankings

NFL and MLB lead on total consideration





# **Audience Profile & Fan Base Compositions**

# The Audience Profile of a Modern Sports Fan

Whether defined as watching sports daily or participating in fantasy sports, fans tend to be more male, younger, wealthier, and more urban

*How to read this data: 71% of daily sports viewers are male, which is 23 percentage points higher than the general population*

	Daily Sports Viewers	Attends 2+ Live Sports Events A Year	Follows Athletes on Social Media	Listens to Sports Podcasts	Fantasy Sports Participants
Male	71% (+23pp)	66% (+18pp)	55% (+7pp)	67% (+19pp)	72% (+23pp)
Gen Z	15% (+3pp)	20% (+8pp)	22% (+10pp)	16% (+4pp)	19% (+1pp)
Millennials	34% (+6pp)	38% (+10pp)	41% (+13pp)	38% (+10pp)	46% (+17pp)
Household income \$100k+	21% (+7pp)	30% (+16pp)	19% (+5pp)	16% (+2pp)	24% (+7pp)
Parents	31% (+4pp)	43% (+16pp)	36% (+9pp)	33% (+6pp)	39% (+9pp)
College-educated	46% (+13pp)	51% (+18pp)	48% (+15pp)	47% (+14pp)	51% (+15pp)
Urban	37% (+9pp)	40% (+12pp)	40% (+12pp)	43% (+15pp)	40% (+7pp)
Black	29% (+16pp)	16% (+3pp)	26% (+13pp)	31% (+18pp)	25% (+12pp)

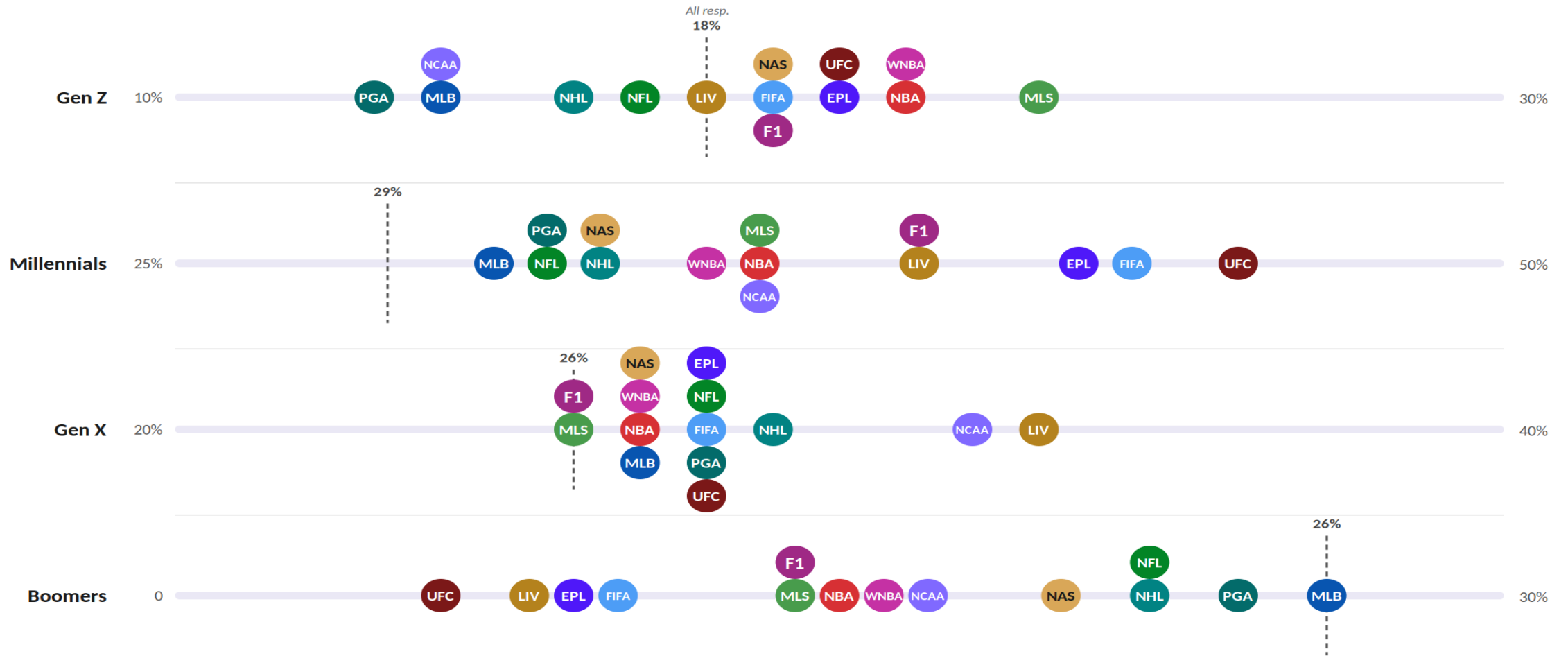
# The Digital World: Sports Fans Over-Index on TikTok and Instagram Usage

Engaged sports fans are disproportionately present on every major platform — TikTok and Instagram show the largest gaps vs. all adults

Platform	All U.S. Adults	Follows Athletes on Social Media	Daily Sports Viewers
TikTok	36% use	67% (+31pp)	57% (+21pp)
Instagram	53%	83% (+30pp)	73% (+20pp)
Reddit	26%	50% (+24pp)	39% (+13pp)
Spotify	35%	58% (+23pp)	45% (+10pp)
Snapchat	34%	56% (+22pp)	45% (+11pp)
LinkedIn	33%	52% (+19pp)	49% (+16pp)
X (Twitter)	39%	54% (+15pp)	52% (+13pp)
Twitch	14%	32% (+18pp)	28% (+14pp)
YouTube	88%	97% (+9pp)	96% (+8pp)

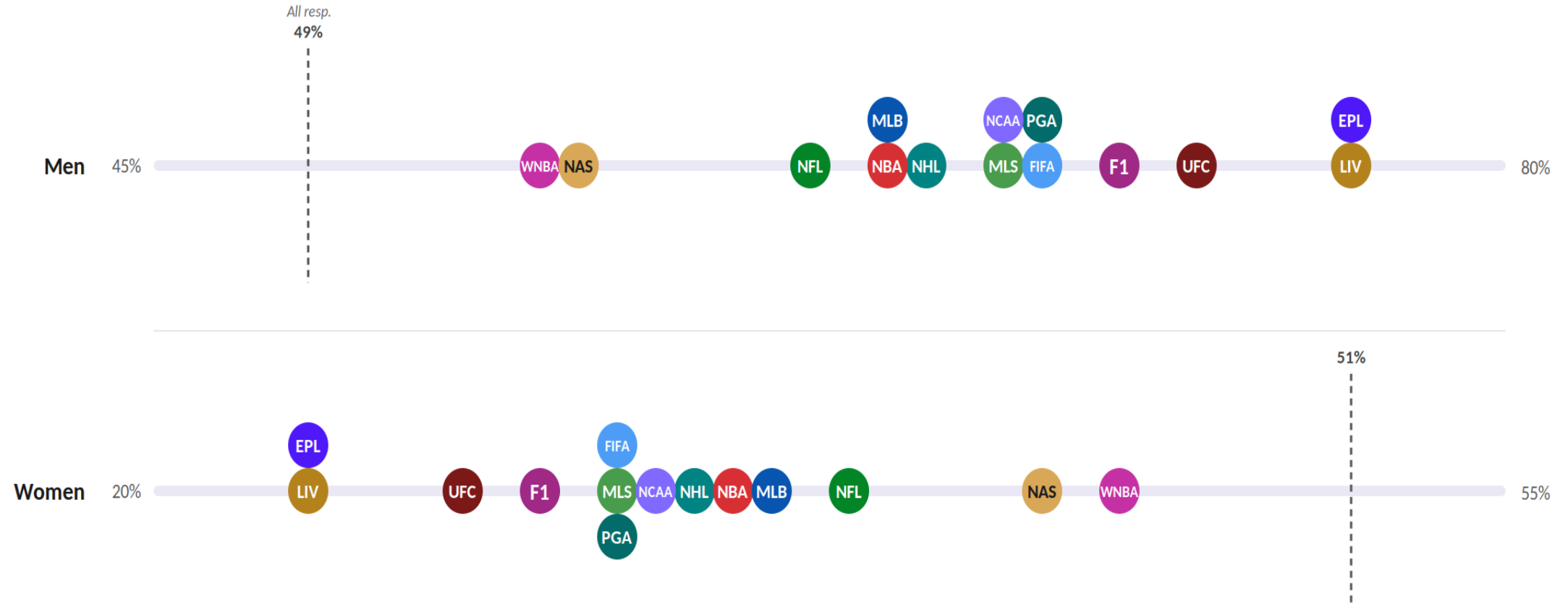
# Fan Base Composition By Generation

MLS and NBA fans skew toward Gen Zers, FIFA and UFC fans skew toward millennials



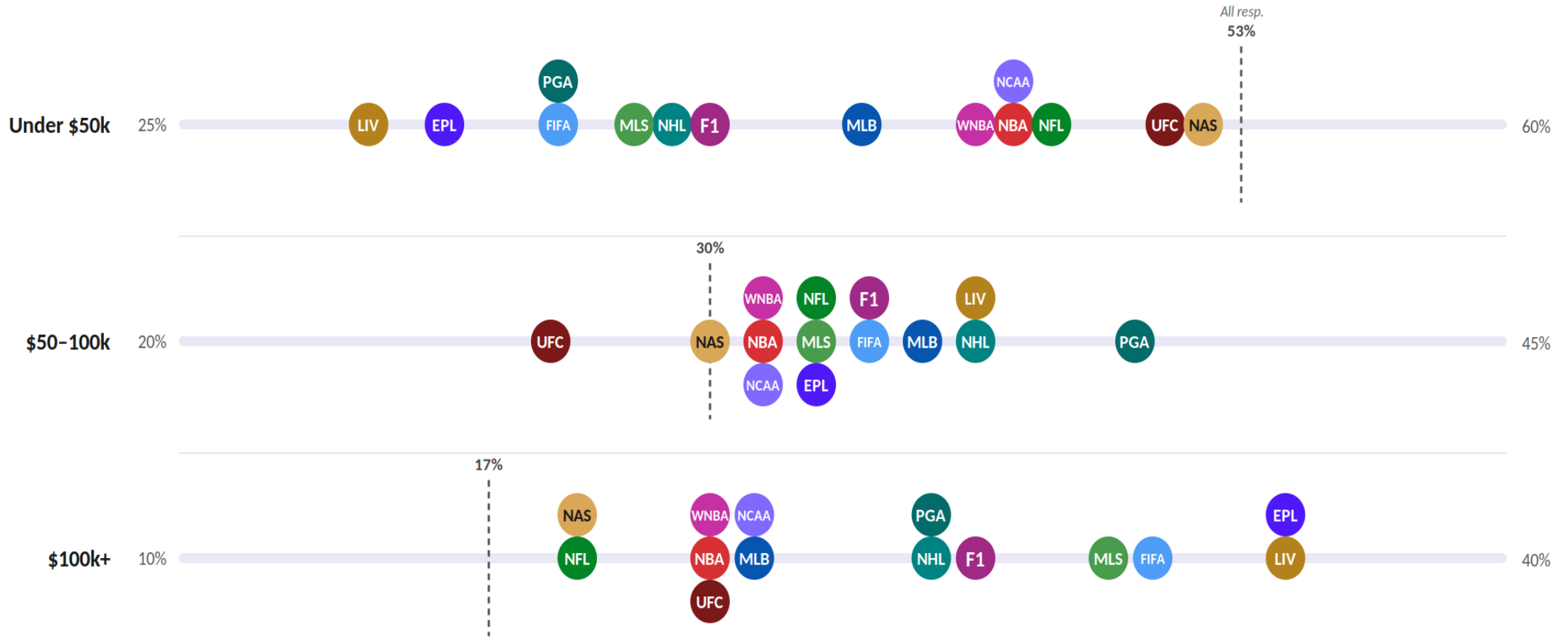
# Fan Base Composition By Gender

Men dominate most fan bases; the WNBA and NASCAR draw notably more female fans than any other league



# Fan Base Composition By Household Income

LIV and Premier League fans over-index on higher incomes; UFC and NASCAR fans skew lower-income



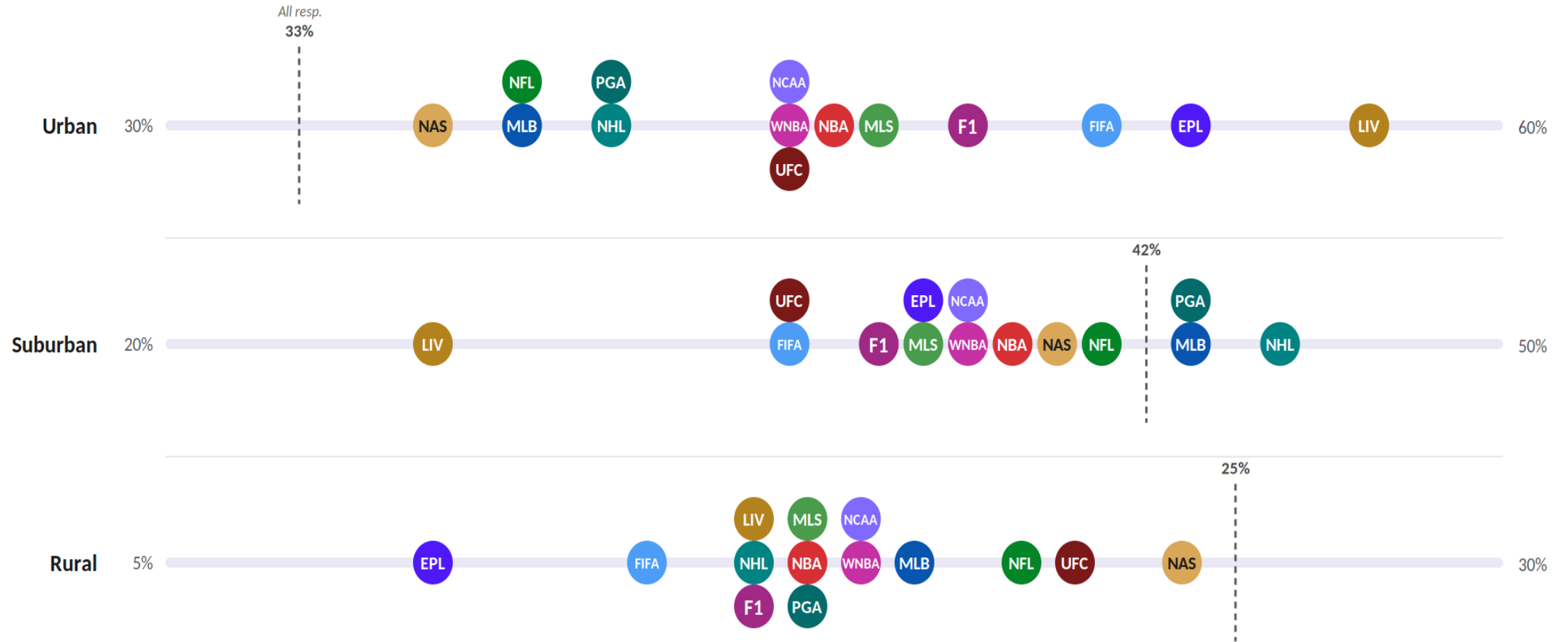
# Fan Base Composition By Political Party

LIV and PGA fans lean heavily Republican; WNBA and EPL fans skew Democratic



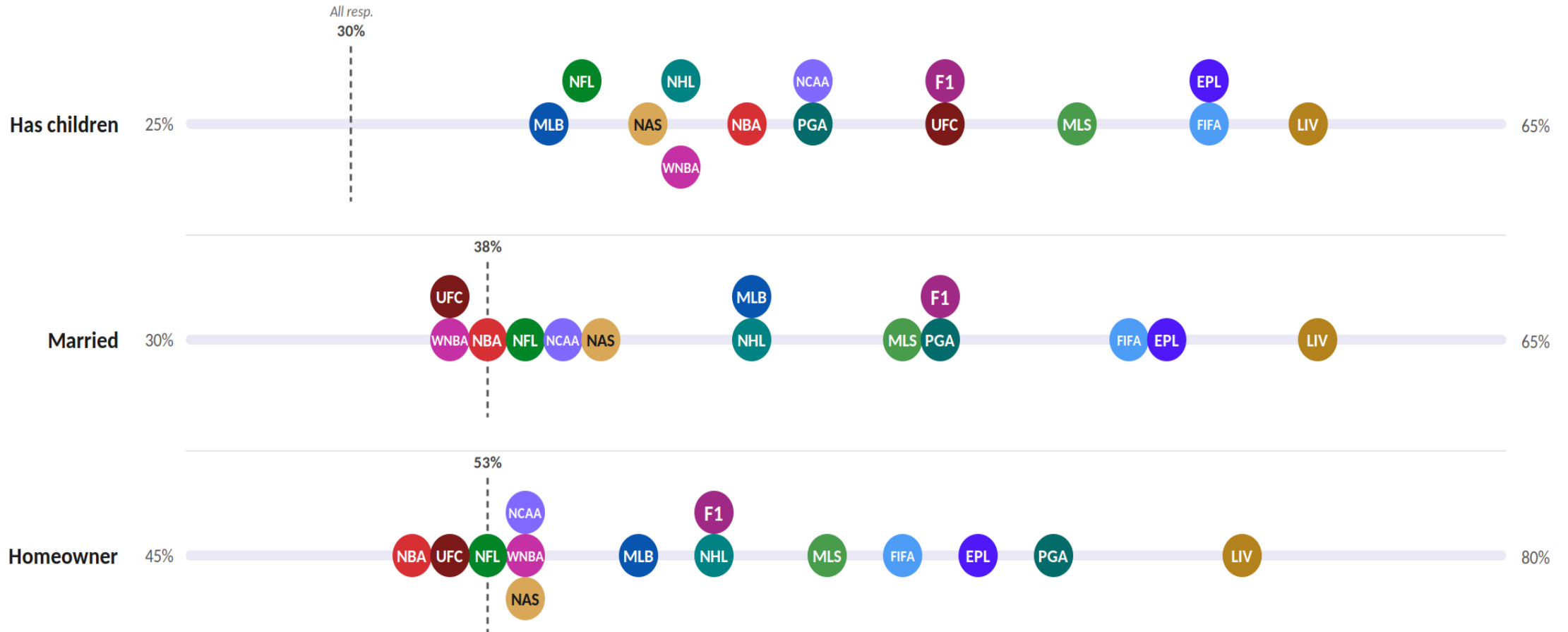
# Fan Base Composition By Community Type

FIFA and EPL fans over-index in urban areas; NASCAR and UFC fans skew more rural



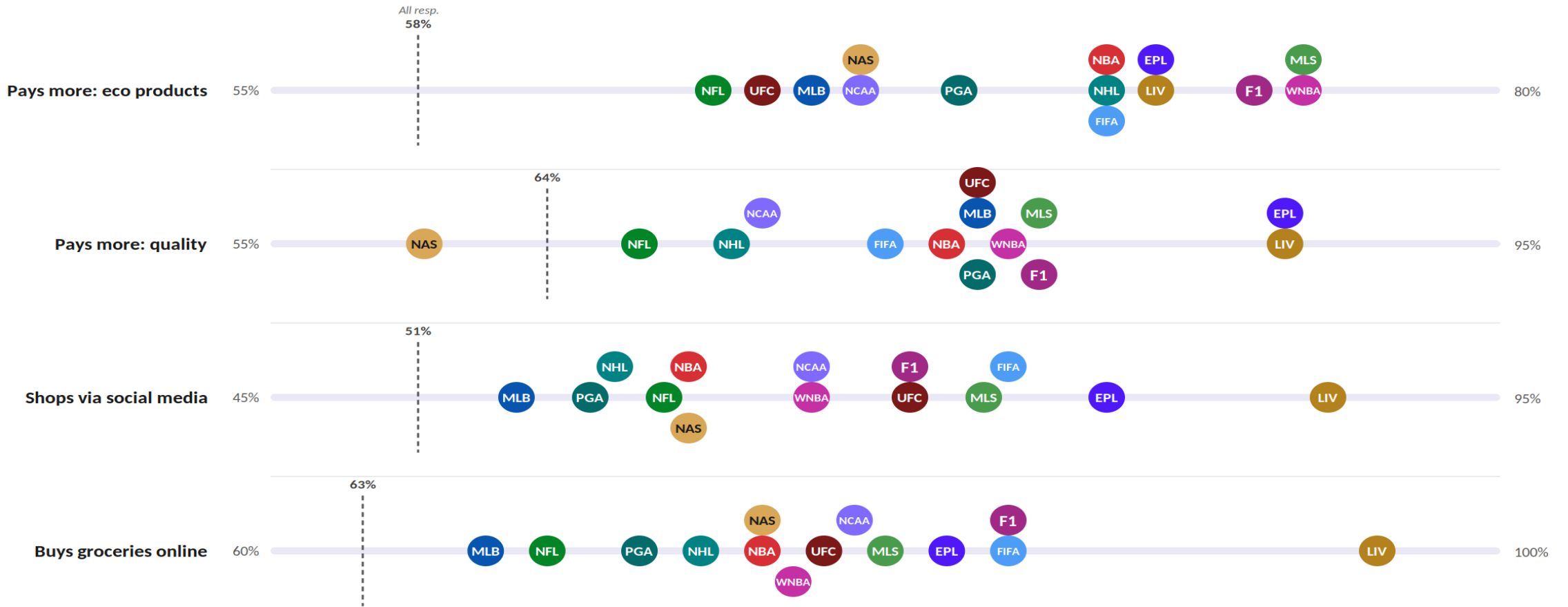
# Fan Base Composition By Family Profile

LIV fans over-index across all three family markers; FIFA and EPL also skew toward parents, married adults, and homeowners



# Fan Base Composition By Consumer Habits

LIV fans over-index on premium and digital purchasing; MLS and FIFA fans lead on social media shopping



# Fan Base Composition By Psychographic Profile

LIV fans dramatically over-index on social status aspiration; MLS and FIFA fans skew trend-forward

