**Sports Market 2022**

**Sports Mania Returns**

Despite the forgettable 2020 sports season, fans continue to follow the major sports, according to January 2022 research from the Sports & Leisure Research Group: football at 88%, basketball at 60%, baseball at 53%, hockey at 30% and soccer at 29%.

The interruption in the sports world increased interest in lesser sports. According to Sports & Leisure Research Group, from April 2020 to January 2022, golf increased by 17%, NASCAR by 25%, horse racing by 29% and MMA by 57%.

The pandemic didn’t stop many leagues from signing new media rights deals, including the NFL’s 11-year, $100 billion deal, which awarded Amazon Prime Thursday Night Football. The NHL has switched to Disney and Turner Sports at $625 million per year in a new deal.

**Media Rights Growth, March 2022**

|  |  |  |  |
| --- | --- | --- | --- |
| League | Previous Annual Value | Current Annual Value | Expiration Date |
| NFL | $3.1 B | $10 B | through 2023 |
| NBA | $900 M | $2.6 B | through 2025 |
| MLB | $1.5 B | $1.8 B | through 2028 |
| NHL | $300 M | $600 M | through 2028 |
| MLS | $200 M | $100 M | through 2022 |

PwC, April 2022

**Venues Are Filled with Fans Again**

The pandemic drastically restricted sports attendance, but average attendance during the first few games of the 2022 MLB season has doubled or almost doubled for some teams: Los Angeles Angels at +83.9% and St. Louis Cardinals at +125.8%, for example.

Similarly for the NBA, the New Orleans Jazz which had the largest average attendance during the 2021 season of 3,675 increased almost three-fold to 18,306 for 2022 while the Chicago Bulls which had no 2021 home games was first for 2022 with an average of 20,881.

The Sports & Leisure Research Group also revealed a much larger percentage had attended a sporting event during January 2022 at 37% than January 2021 at 21%. Approximately half said they were still wearing masks to indoor sporting events.

**Indices of Adults 18+ Who Attended Three or More College/Professional Sports Event During the Past Year, by Generation, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Generation | Miami-Ft. Lauderdale | Nashville | Milwaukee-Racine, WI | Denver | Portland, OR |
| Gen Z | * 110 | * 178 | * 164 | * 113 | 190 |
| Millennials | * 167 | * 85 | * 96 | * 93 | * 124 |
| Gen X | * 74 | * 54 | * 111 | * 146 | * 37 |
| Baby Boomers | * 62 | * 168 | * 54 | * 51 | * 75 |

Based on The Media Audit’s Fall 2021 surveys

**Viewing from the Home’s Box Seats**

Data from five 2021 representative consumer/market surveys conducted by The Media Audit shows the oldest average age of adults 18+ who watched any major professional or college sports on TV during the past 12 months was college basketball at 52.2.

Unsurprisingly, the next oldest were those watching MLB games at 51.2 years of age and the NFL at 51.1 years of age. The youngest were those viewing NBA games at 45.7, then MLS at 46.2 and NHL at 49.0 years of age.

**Average Income of Adults 18+ Who Watched Major Professional/College**

**Sports on TV During the Past Year, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| League/Sport | Miami-Ft. Lauderdale | Nashville | Milwaukee-Racine, WI | Denver | Portland, OR |
| MLB | * $77,800 | * $73,900 | * $75,400 | * $80,200 | $80,200 |
| MLS | * $70,800 | * $58,000 | * $87,000 | * $94,600 | * $83,200 |
| NBA | * $72,900 | * $67,800 | * $69,800 | * $80,400 | * $74,000 |
| NFL | * $74,200 | * $66,800 | * $71,500 | * $80,100 | * $71,600 |
| NHL | * $73,400 | * $73,300 | * $74,800 | * $85,500 | * $89,200 |
| College basketball | * $77,900 | * $71,000 | * $75,200 | * $90,900 | * $76,500 |
| College football | * $75,200 | * $69,900 | * $81,300 | * $88,300 | * $72,100 |

Based on The Media Audit’s Fall 2021 surveys

**Esports Is Exploding**

According to NewZoo’s April 2022 Global Esports Report, the global esports audience will increase 8.7% during 2022 to a total of 532.0 million and will increase to 640.8 million by 2025. Total 2021 global esports revenues are forecast to increase 21.8% to $1.38 trillion.

A slightly different set of five 2021 representative consumer/market surveys from The Media Audit shows almost 80% of men (78.4%) were esports fans and of all adults 18+, 66.8% were 25–44 years of age.

While the average household income of all esports fans 18+ was $70,500, the average household income of Millennials who were esports fans was $78,200 and the average household income of men 25–44 who were esports fans was $80,400.

**Indices of Men 25–44 Who Were eSports Fans and**

**Selected Planned Purchases, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Purchase Plans | Tampa-St. Petersburg | Columbus | Milwaukee-Racine, WI | Denver | Monterey-Salinas, CA |
| New car/van/truck/SUV/crossover\* | * 130 | * 19 | * 192 | * 145 | 160 |
| New furniture\* | * 171 | * 88 | * 124 | * 129 | * 145 |
| New bed/mattress\* | * 157 | * 111 | * 192 | * 114 | * 69 |
| One or more smart speakers\* | * 127 | * 119 | * 162 | * 125 | * 107 |
| A new home (next 2 years) | * 79 | * 115 | * 192 | * 149 | * 84 |
| Any home improvements\* | * 137 | * 106 | * 151 | * 110 | * 94 |
| New TV\* | * 58 | * 115 | * 180 | * 118 | * 113 |

Based on The Media Audit’s 2021 surveys \*during the next 12 months

**Sports Betting Is a Winner**

With live, legal sports betting in 30 states and Washington, DC, three states where it’s legal, but not in operation and nine states where legislation or voting is pending, it’s no surprise February 2022 sports betting totaled $360.2 million, a 55.6% increase from February 2021.

Insider Intelligence/eMarketer is forecasting 19.0 million Americans will be betting on sports online during 2022, which is 7.9% of all adult Internet users, increasing 31.0% from 2021. By 2023, the total number of online sports bettors could increase to 23.1 million.

Analyzing data from The Media Audit’s same five 2021 consumer/market surveys on page 2 reveals 78.7% of adults who placed sports wages monthly online or via a mobile app one or more times were men and Millennial men over-index the most, on average, at 151.

**Indices of Men 18+ Who Placed Bets on Any College/Professional Sports Games During the Past Year, by Household Income, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Household Income | Miami-Ft. Lauderdale | Nashville | Milwaukee-Racine, WI | Denver | Portland, OR |
| less than $35,000 | * 76 | * 34 | * 61 | * 63 | 23 |
| $35,000–$49,999 | * 100 | * 14 | * 138 | * 130 | * 83 |
| $50,000–$74,999 | * 62 | * 69 | * 155 | * 107 | * 189 |
| $75,000–$99,999 | * 116 | * 122 | * 46 | * 74 | * 29 |
| $100,000–$149,999 | * 114 | * 304 | * 105 | * 150 | * 72 |
| $150,000 or more | * 156 | * 154 | * 130 | * 96 | * 262 |

Based on The Media Audit’s Fall 2021 surveys

**Fast-Tracked Trends**

PwC’s 2022 Sports Outlook Report cites NFTs (non-fungible tokens) as a growing trend in the sports market. Not only are there more collectible, limited-edition NFTs based on classic sports events and players, but also NFT companies are creating digital trading cards.

Sports teams are also limiting their exposure to and attraction of Gen Zers because teams are not creating and sharing enough short-form video content, which is very popular with the youngest adults.

Although more live sports broadcasts have moved from traditional TV to streaming services, many US teams may have to follow the trend in Europe where free streaming services have become very popular with sports fans to watch games.

**Indices of Adults 18+ Who Watched/Listened to Live Streams of NFL Games During the Past Year, by Generation, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Generation | Miami-Ft. Lauderdale | Nashville | Milwaukee-Racine, WI | Denver | Portland, OR |
| Gen Z | * 64 | * 30 | * 73 | * 104 | 99 |
| Millennials | * 197 | * 159 | * 164 | * 122 | * 109 |
| Gen X | * 81 | * 133 | * 118 | * 109 | * 136 |
| Baby Boomers | * 37 | * 52 | * 48 | * 72 | * 74 |

Based on The Media Audit’s Fall 2021 surveys

**More Valuable Insights**

Brands and advertisers can’t overlook female sports fans just because a larger percentage of those fans are men. Data from The Media Audit’s same five 2021 consumer/market surveys on page 3 shows women 18+ under-indexed, on average, as fans of college sports and professional sports. Separating the data by generation reveals a quite different story.

Gen X women over-indexed the most as college sports fans, on average, at 115 ,and professional sports fans, on average, at 113. While Millennial women over-indexed, on average, as professional sports fans at 104 and Baby Boomer women over-indexed, on average, as college sports fans at 106. These are the women with larger disposable incomes and more likely to respond to the many TV and radio commercials seemingly directed at men only.

Although 78.6% of men 18+, on average, placed bets on any college or professional games during the past 12 months, that means slightly more than 20% of women 18+ were also betting. Viewing this data by generation shows women betting on sports skewed slightly younger than those who are professional or college sports fans.

**Indices of Women 18+ Who Placed Bets on Any College/Professional Sports Games During the Past Year, by Generation, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Generation | Miami-Ft. Lauderdale | Nashville | Milwaukee-Racine, WI | Denver | Portland, OR |
| Gen Z | * 32 | * 92 | * \* | * 171 | 279 |
| Millennials | * 137 | * 53 | * 169 | * 125 | * 84 |
| Gen X | * 191 | * 115 | * 141 | * 150 | * 72 |
| Baby Boomers | * 17 | * 134 | * \* | * 20 | * 102 |

Based on The Media Audit’s Fall 2021 surveys \*insufficient data

*Sources:* Sports & Leisure Research Group Website, 4/22; PwC Website, 4/22; Baseball-Reference Website, 4/22; ESPN Website, 4/22; The Media Audit Website, 4/22; Newzoo Website, 4/22; American Gaming Association Website, 4/22; eMarketer Website, 4/22.

*Updated*: April 2022

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**Local Market and Station Information**