



2026 ANNUAL REPORT

Sports Fandom & Sports Market Intelligence Report

The State of the American Sports Fan in the New Era of Fandom

Total Fans • Attendance • Viewership • Streaming • Gambling • Demographics • Fan Engagement State

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Message From Team

Welcome to the Annual Sports Fan Summary Report. For more than a decade, SBRnet has been committed to one mission: helping the sports industry understand its most valuable asset; the fan. This year's report represents our most comprehensive look yet at the American sports fan, shaped by over 7,500 sport fans, 19 sports, and three years of trend data. We are proud to share it with you, and we hope the insights inside help you make sharper decisions, spark new ideas, and grow your corner of this industry we all love.

Neil Schwartz

President



Pegah Sarkoohi

Data Scientist & Lead Analyst



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Terminology Guide

1 **NFL:** National Football League

2 **NBA:** National Basketball Association

3 **MLB:** Major League Baseball

4 **NHL:** National Hockey League

5 **MLS:** Major League Soccer

6 **College Fball:** College Football (Top 50 Schools)

7 **Other Women Sports:** College Volleyball, Soccer, College Softball, College Soccer, Ice Hockey, and College Ice Hockey.

8 **MMA:** Mixed Martial Arts

9 **MiLB:** Minor League Baseball

10 **eSports:** Gaming

11 **WNBA:** Womens' National Basketball Association

12 **NASCAR:** National Association for Stock Car Auto Racing

13 **College Bball:** College Basketball (Top 50 schools)

1

Introduction: Why Sports Fandom Matters

Sports fandom is one of the most valuable and measurable forms of consumer attention in the modern economy. When fans tune in to a Sunday NFL broadcast, stream a WNBA playoff game, buy a jersey, place a bet, or travel across state lines to see their team, they are giving a brand, a league, and an industry their time, their money, and their loyalty; often for a lifetime.

That loyalty drives billions of dollars annually in media rights, ticketing, licensed merchandise, sponsorship, sports betting, fantasy, travel, and brand purchases. And it is shifting faster than ever: streaming is reshaping how fans watch, women's sports are entering the mainstream, legalized gambling has rewritten the fan-game relationship, and Gen Z is consuming sports in ways no generation has before. In this environment, generalizations about "the sports fan" are not just insufficient, they are strategically dangerous.



1

Introduction: Why Sports Fans and Fandom Matters

This is where SBRnet comes in. Our 2026 Annual Consumer Study captured behavioral and attitudinal data from over 7,500 U.S. sports fans ages 13 and older across 23 professional, college, and minor league sports, with each respondent measured on more than 70 categories of demographic, media, streaming, social, sponsorship, gambling, fantasy, merchandise, and brand-preference data.

This report distills that intelligence into the story of the American sports fan in 2026 including who they are, how they watch, how they engage, and how they spend. We also introduce **Sports Fan 360**, SBRnet's new platform for putting this intelligence to work. Whether you are a brand, a rights holder, an agency, a team, or a researcher, the pages that follow are built to help you make sharper, faster, more confident decisions, grounded in the most complete picture of the American sports fan available today.



2

SBRnet Data Categories

SBRnet collects holistic data focused on modern fan behaviors. How they watch, engage, spend, and connect with sports across platforms and experiences. Our data covers key categories including fan reach and consumption, digital and social engagement, spending and economic activity, fan interests and lifestyle, and core demographics such as gender, age, and income.

1 Fan Size & Reach

- Total Number of Fans

2 Media Consumption Behavior

- Live Attendance
- Viewership
- Streaming

5 Fan Interest & Lifestyle

- Fantasy
- Sustainability
- Philanthropy
- Women's Sports

4 Fan Spending & Economic Behavior

- Merchandise
- Sport Gambling
- Sport Travel
- Sponsorship
- Secondary Tickets

3 Social Media Engagement

- Facebook
- X
- Snapchat
- Instagram
- YouTube
- TikTok

6 Fans' Demography

- Age & Generation
- Gender
- Income
- Education
- Race
- Region

3

Life in the "Age of the Sports Fan"

Social media, second-screen behavior, and the shift from passive watching to active participation.

For nearly six decades, I have been a sports fan—but for most of that time, my options for showing it were narrow. My earliest memories are of my dad taking me to Philadelphia Eagles games at Franklin Field. Every summer, our family would catch a handful of Phillies games. As I got older, I fell hard for ice hockey and the Flyers. Yet no matter which team had my heart, fandom essentially came down to two choices: buy a ticket or turn on the network broadcast.

Fast-forward to 2026. I am sixty years older, still a sports fan, but the ways I can engage with my teams have multiplied beyond anything I could have imagined as a kid. Social media was just the beginning. Today, fandom plays out across no fewer than ten distinct categories. Attendance and viewership are still in the mix, but now they share the stage with streaming, sports gambling, licensed merchandise, fantasy sports, sports tourism, and team-driven involvement in charities, social causes, and sustainability initiatives—and that's only a partial list.

This expansion has fundamentally changed what fan engagement means, and its created real demand for more holistic ways to understand and measure it. As one Athletic Director at a major Division I program recently put it, "We are in the age of the Fan."

Neil Schwartz

President, SBRnet

4

Inside the Data: Our Methodology

7,500

U.S. CONSUMERS SURVEYED

Ages 13+, nationally representative

23

SPORTS COVERED

Professional, college & minor league

70

CATEGORIES MEASURED

Fandom, media, spend & behavior

WHAT WE MEASURE

Media & Platforms

Traditional viewership, streaming, and social media usage

Behavioral Trends

Gambling, fantasy, eSports, tourism & philanthropy

Live Attendance

Games attended and frequency of attendance

Consumer Habits

Licensed merch, secondary tickets, sustainability & brand preference

DATA INTEGRITY Weighted to U.S. Census standards (age, gender, race, income, region) and projected to the full U.S. population of 288.9 million consumers ages 13+.

SOURCE

SBRnet Study of Sports Fandom, 2026

[Full methodology → sportsmarketanalytics.com/About/Methodology.aspx](https://sportsmarketanalytics.com/About/Methodology.aspx)

5

Three Years of Sports Fan Growth: Where Fandom Is Expanding

Team, College, Women's, and Individual Sports — Total Fans, Live Attendance, Viewership, Streaming.

Total Fans

Anyone who attended at least one game in person OR watched at least one game on traditional TV or streaming, over the past 12 months.

Charts grouped by: Team • College • Women's • Individual

Live Attendance

Fans who attended at least one game in person at the venue over the past 12 months.

Charts grouped by: Team • College • Women's • Individual

Viewership

Fans who watched at least one game via traditional cable/broadcast TV or streaming services.

Charts grouped by: Team • College • Women's • Individual

LEAGUE GROUPS

 Team Sports

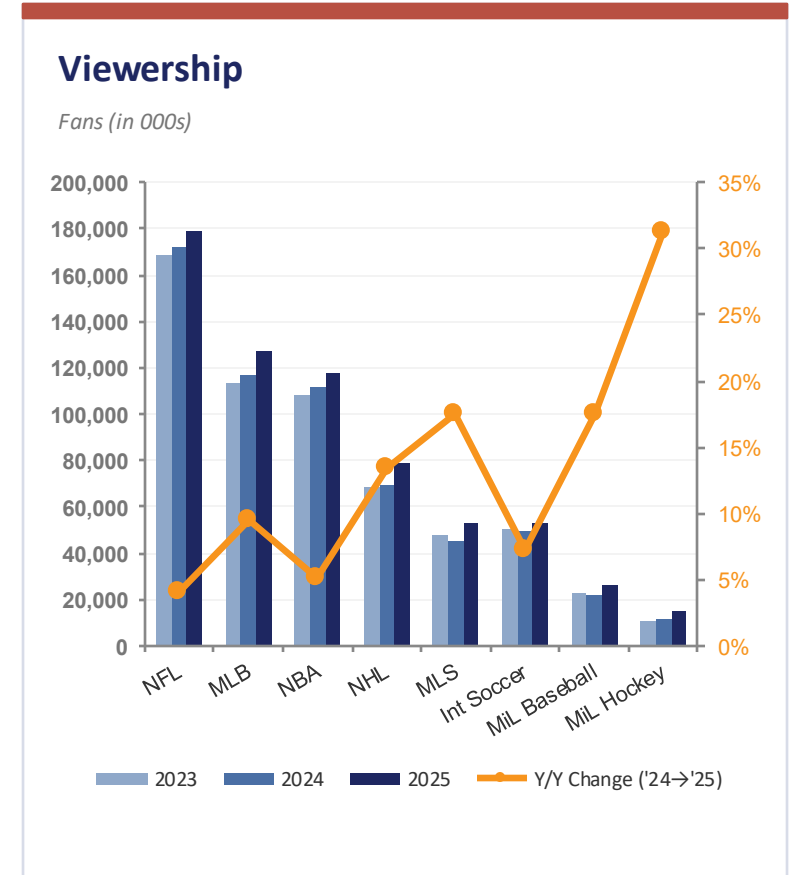
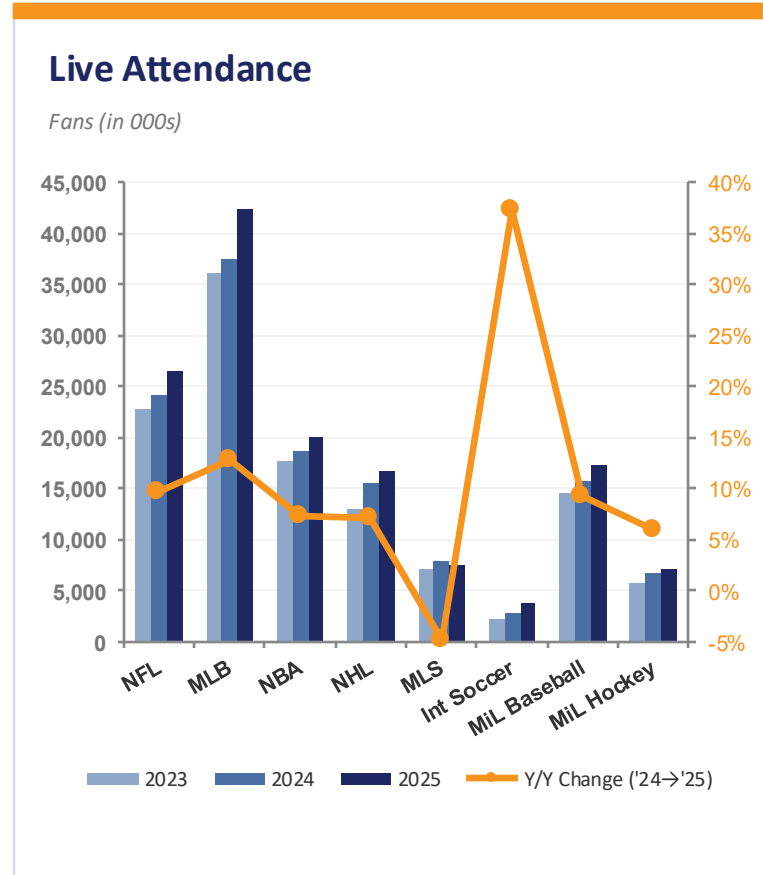
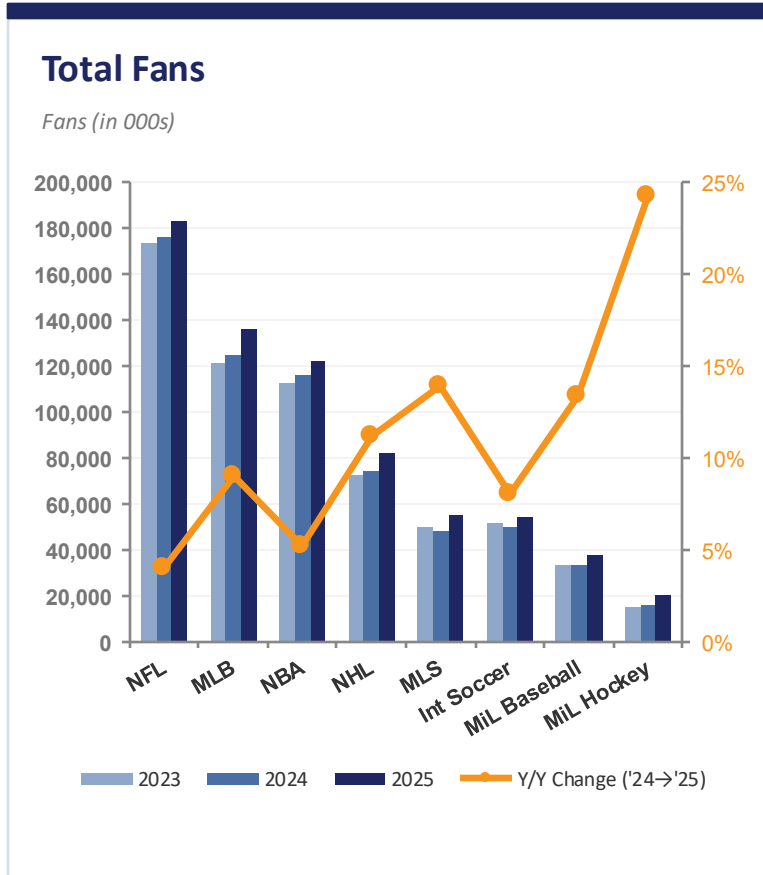
 College Sports

 Women's Sports

 Individual Sports

Team Sports

How the 8 team sports leagues are trending — Total Fans, Live Attendance, and Viewership, 2023 → 2025.



The trend line reflects the percentage change between 2024 and 2025, with 2024 as the baseline.

The Big Three keep getting bigger — but each is winning a different game.

NFL, MLB, and NHL together added 41 million fans over three years. The headline numbers are similar; the underlying behaviors are very different.

401M

Combined NFL + MLB + NHL fans, 2025

+10.1%

Combined 3-yr Total Fans growth

85.7M

Combined live attendance, 2025

+19.8%

Combined 3-yr Live Att. growth

1 NFL: still the biggest, still growing

The NFL added nearly 10 million Total Fans over 3 years (+5.8%) — modest in percentage terms but the largest absolute gain of any league we measure. 97% of NFL fans watched at least one game in 2025, and live attendance grew +9.7% Y/Y. The NFL isn't just holding the lead — it's pulling away from the rest of the field.

183.6M Total Fans, 2025

2 MLB: the live-attendance leader by a wide margin

31% of MLB fans attended at least one game in 2025 — more than 2x the NFL's rate (14.5%) and 1.5x the NHL's (20.3%). With 81 home games per team and 42M live attendees in 2025 (+12.8% Y/Y), MLB has built the strongest in-person franchise in U.S. sports.

31.2% Fans who attended in person

3 NHL: the breakout among the Big Five

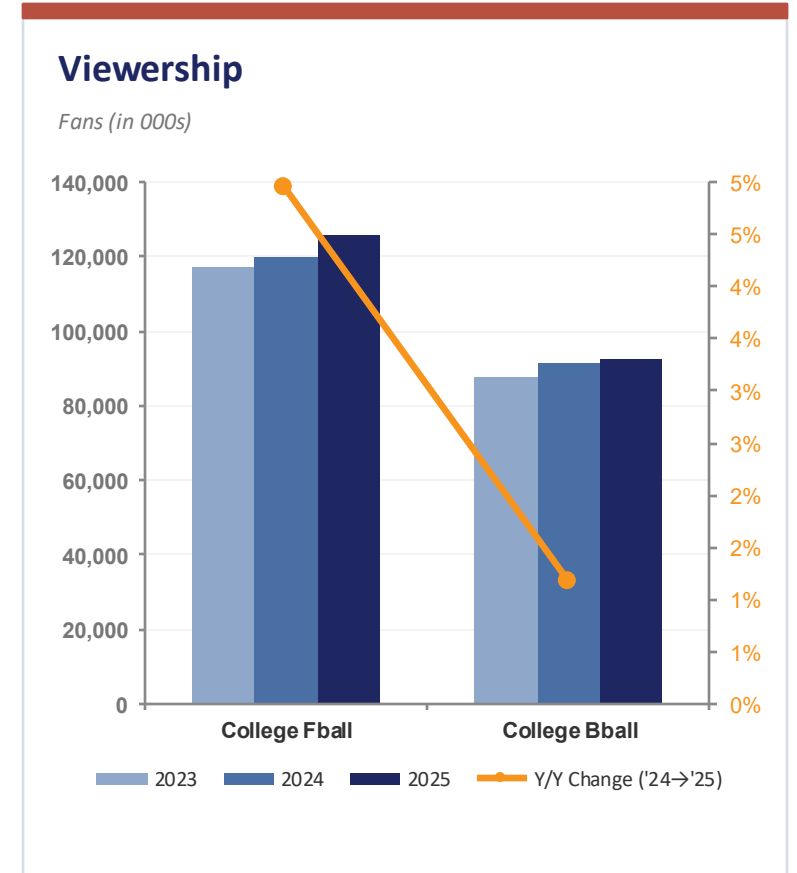
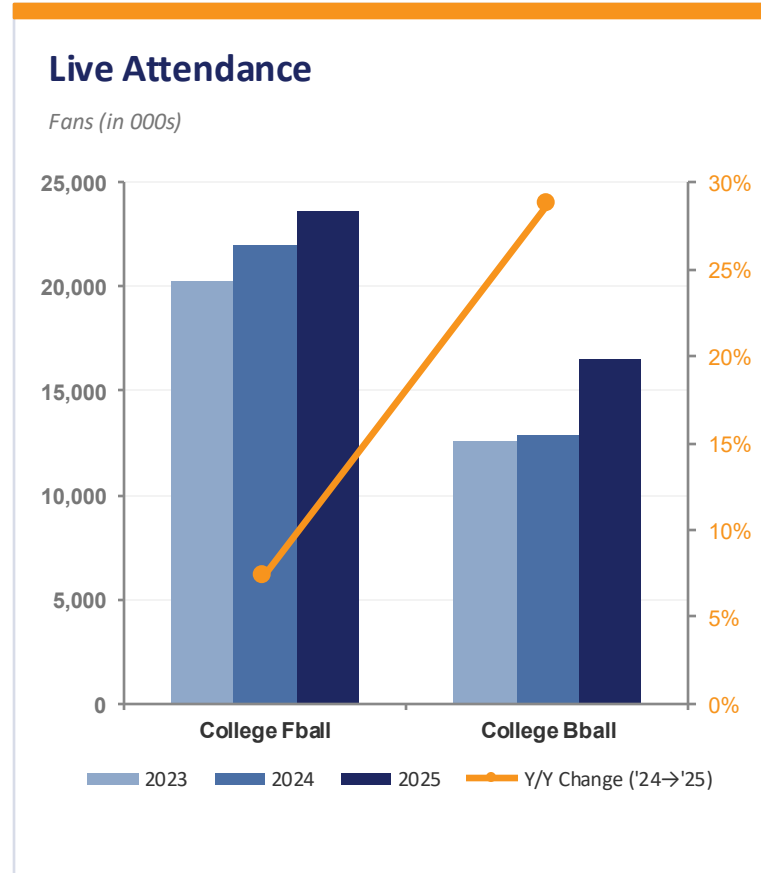
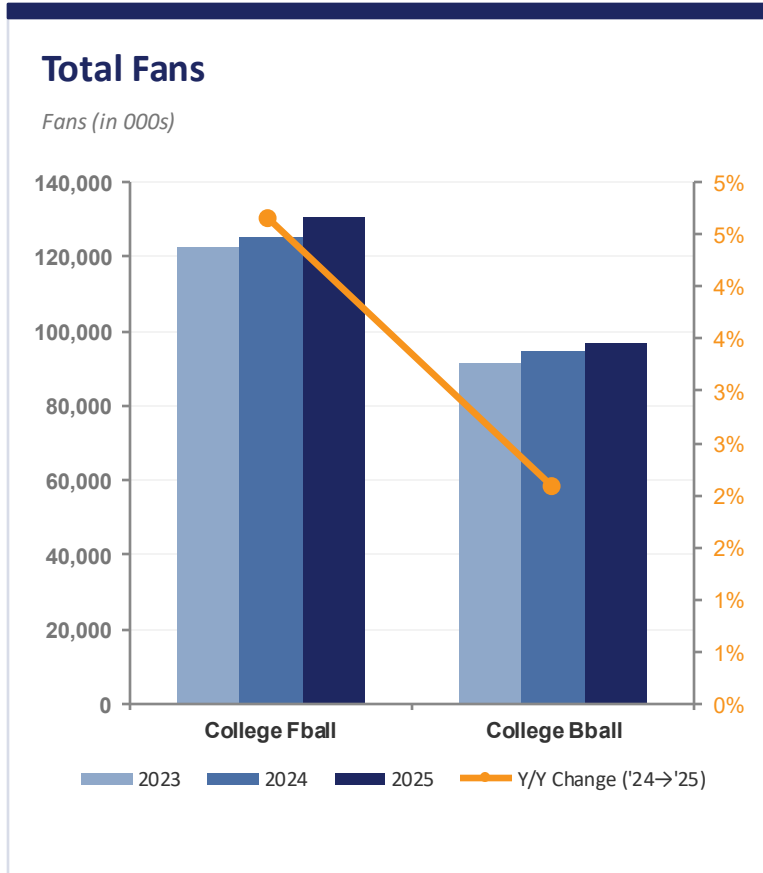
NHL grew Total Fans +11.2% Y/Y and Viewership +13.5% — both the highest growth rates in this group, more than doubling the NFL's pace. After three years of expansion, marquee outdoor games, and a deeper playoff bracket, the NHL is the Big Three's quiet growth story.

+11.2% Total Fans Y/Y

BOTTOM LINE Three leagues, three playbooks. The NFL is a media giant, MLB is the in-person king, and the NHL is the fastest-growing of the three. Brands targeting team sports should not treat them as a single category — the audience economics are fundamentally different.

College Sports

How the 2 college sports leagues are trending — Total Fans, Live Attendance, and Viewership, 2023 → 2025.



The trend line reflects the percentage change between 2024 and 2025, with 2024 as the baseline.

Saturdays are still TV. But arenas just got hot.

College Football remains the bigger fanbase, but College Basketball quietly delivered the most explosive in-person growth of any league in any group this year.

228M

Total Fans, 2025

+6.4%

3-yr Total Fans growth

+22.0%

3-yr Live Attendance growth

+28.8%

CBB Live Att. Y/Y

1 College Basketball attendance jumped +28.8% in one year

From 12.8M to 16.5M live attendees Y/Y — the largest one-year jump of any league of meaningful size. Caitlin Clark's college run, transfer portal star power, and an NIL-driven roster turnover are pulling fans back to the arena in numbers we have not seen in a decade.

+28.8% CBB Live Attendance. Y/Y

2 College Football's growth is steady, not flashy

CFB grew +4.6% Total Fans, +7.3% live attendance, and +5.0% viewership — solid across the board, but not the breakout year CBB had. CFB is now a mature, predictable brand engine — exactly the kind of inventory long-term sponsors prize.

+7.3% CFB Live Attendance. Y/Y

3 Both leagues out-attended every pro league except MLB

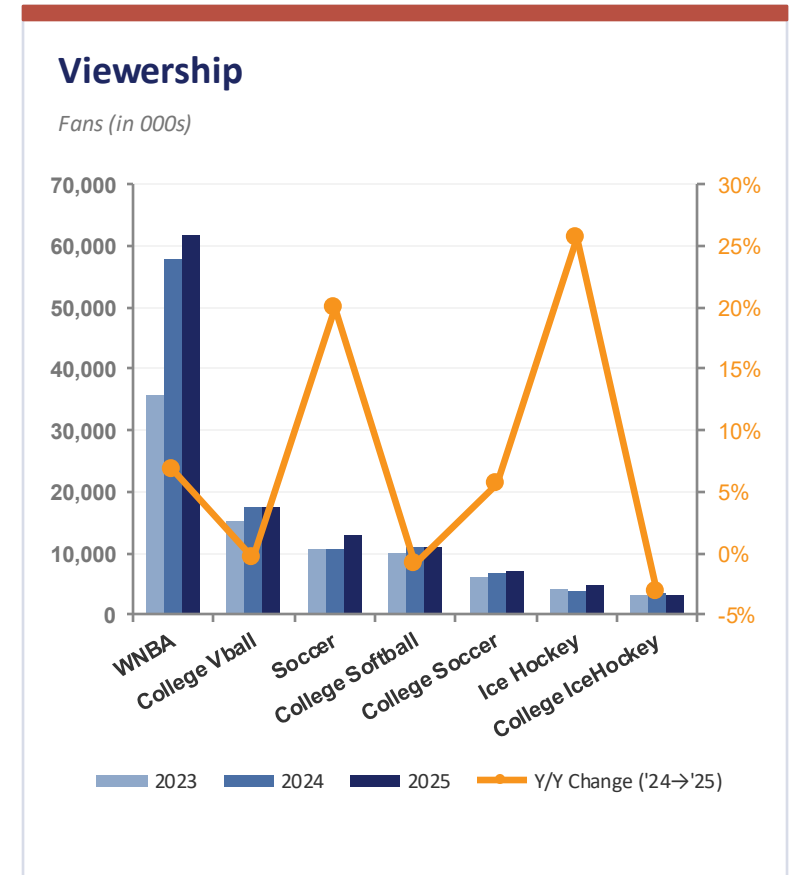
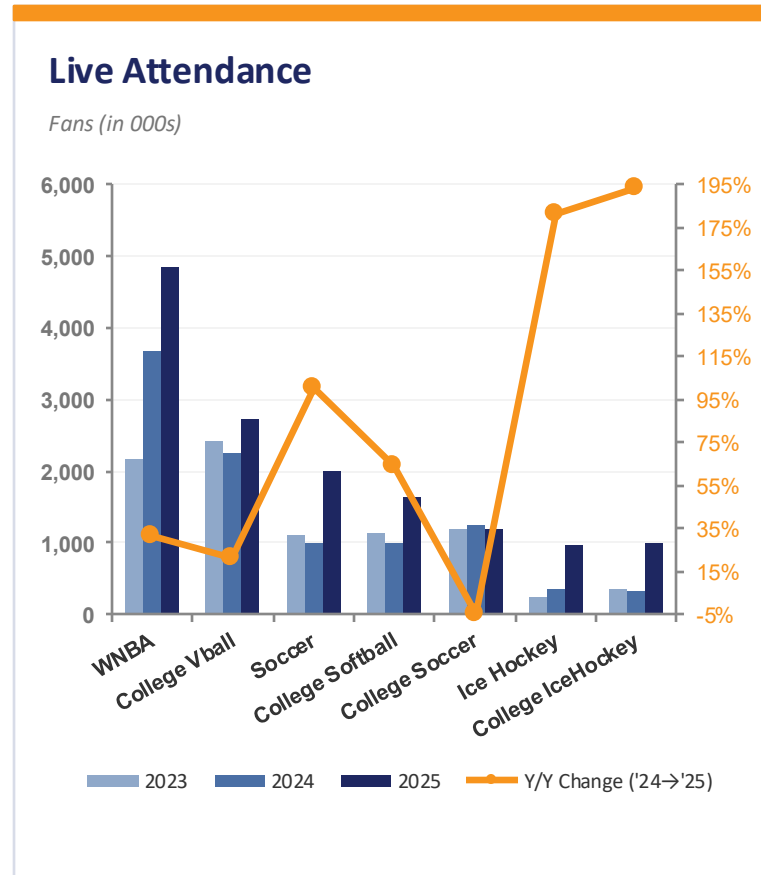
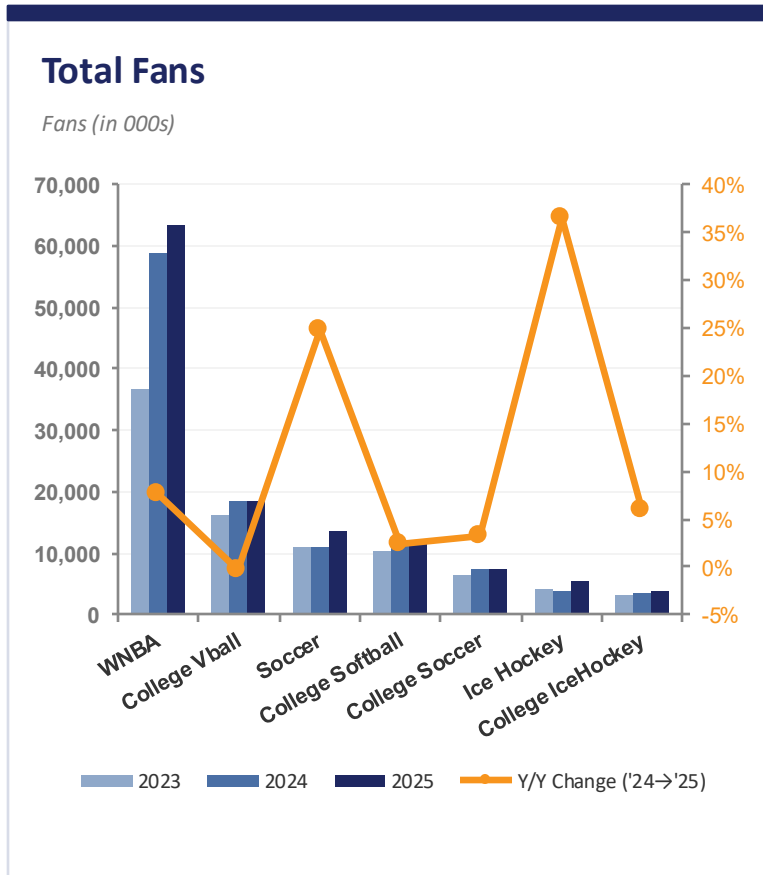
Combined college live attendance hit 40.2M in 2025 — second only to MLB (42.4M). College sports are no longer the "amateur tier" of the U.S. attendance picture; they're the second-largest gate in the country.

40.2M Combined Live Attendance

BOTTOM LINE College sports are no longer a developmental product — they are a top-tier consumer brand. CBB's attendance surge in particular signals an inflection point worth tracking closely in 2026.

Women's Sports

How the 7 women's sports leagues are trending — Total Fans, Live Attendance, and Viewership, 2023 → 2025.



The trend line reflects the percentage change between 2024 and 2025, with 2024 as the baseline.

The fastest-growing category in American sport.

Women's sports added 41% more fans and 66% more live attendees in just three years. The PWHL launch in 2024 reshaped the entire ice hockey landscape — and the WNBA's growth has not slowed.

124M

Total Fans, 2025

+41.3%

3-yr Total Fans growth

+65.8%

3-yr Live Att. growth

+193%

Top single-league Y/Y

1

Women's Pro Ice Hockey (PWHL) is the breakout story

Pro Ice Hockey grew Total Fans +36.5% and live attendance +181% Y/Y — a category-redefining surge. The PWHL's 2024 launch turned women's pro hockey from a niche product into the fastest-growing women's league in America by every metric we track.

+181% Pro Ice Hockey Live Attendance.

2

WNBA's growth is real and durable

WNBA grew +7.5% Total Fans Y/Y on top of last year's massive Caitlin Clark surge — proving the 2024 jump was an inflection, not a spike. Live attendance is up +31% Y/Y and +122% over 3 years; the WNBA now reaches 63M U.S. fans.

+72.7% 3-yr Total Fans growth

3

Pro Soccer doubled its live attendance

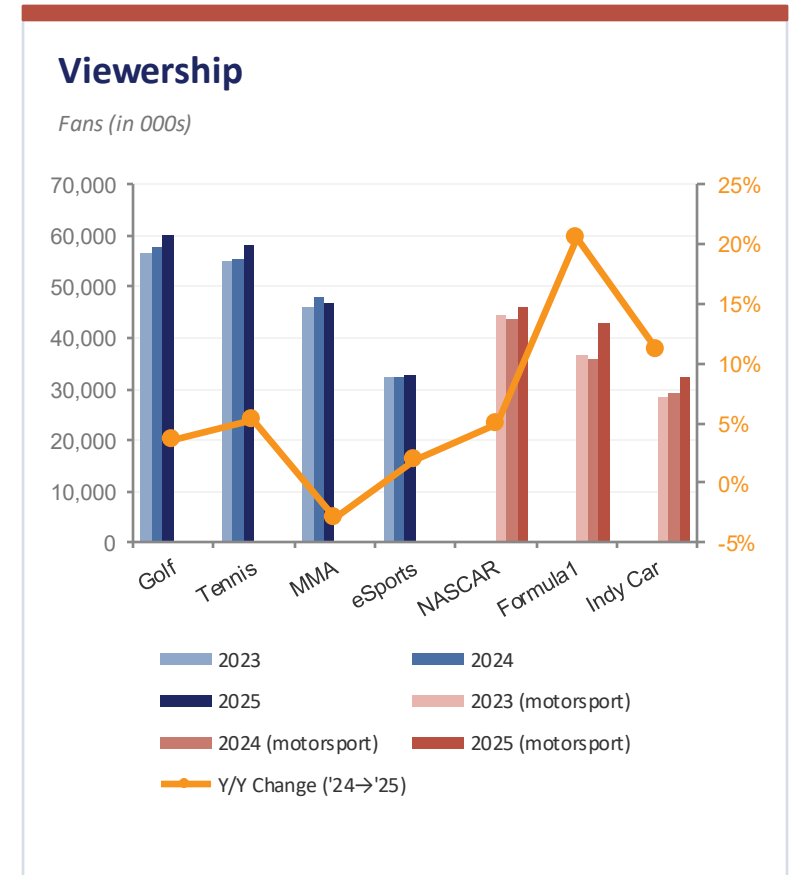
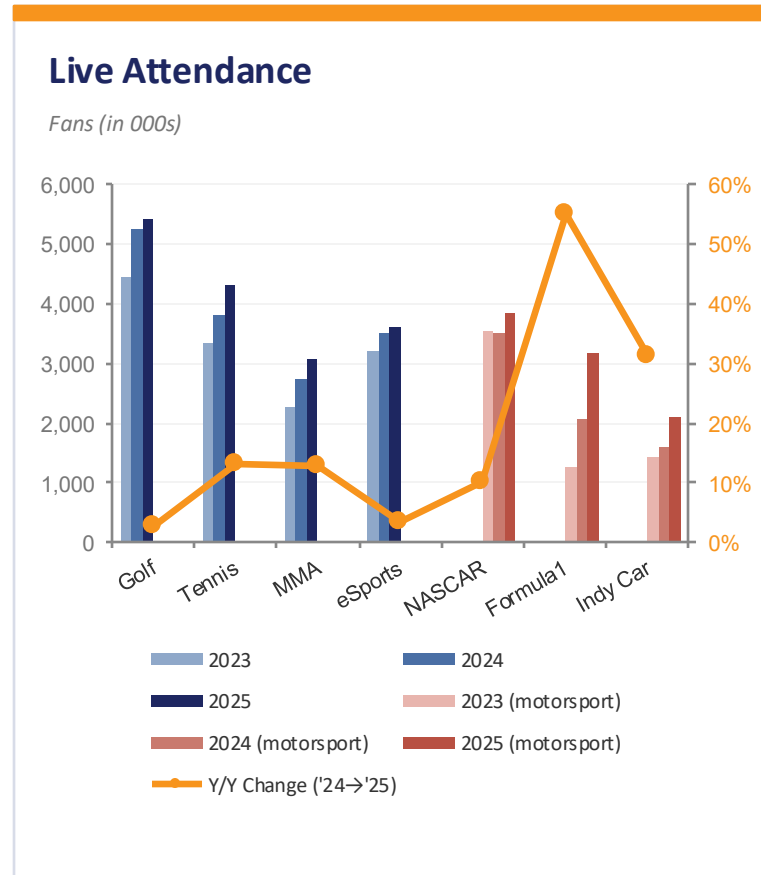
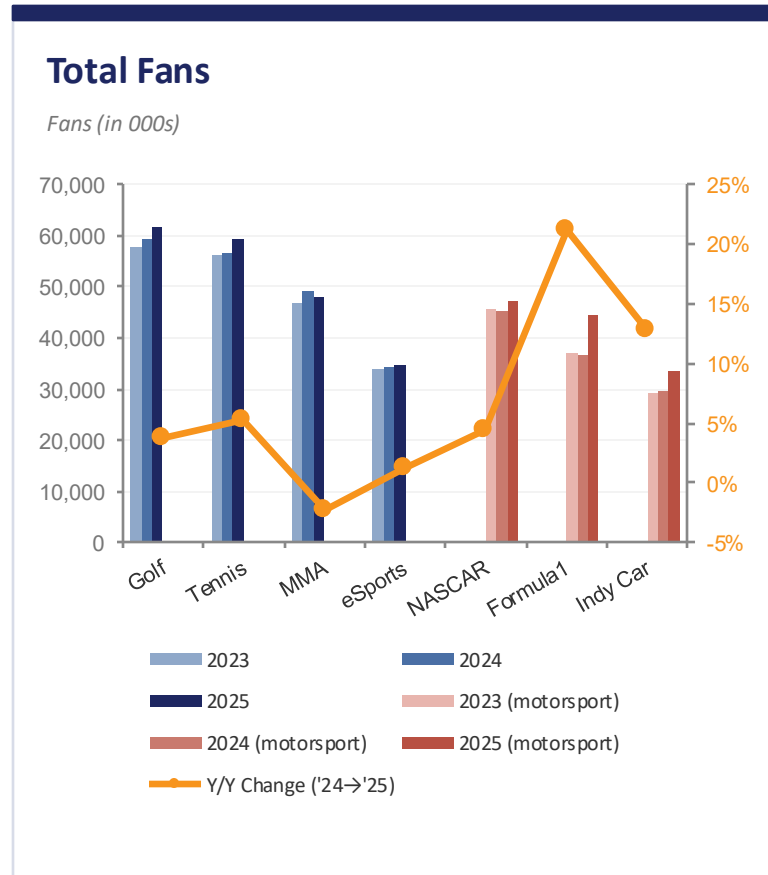
Pro Soccer (NWSL + USL Super League) grew +24.8% Total Fans and +101% live attendance Y/Y. The NWSL's expansion teams and the USL's new league launch are pulling new fans into stadiums at a rate matched only by Pro Ice Hockey.

+100.7% Pro Soccer Live Attendance

BOTTOM LINE Women's sports are no longer one story (the WNBA) — they are a portfolio. With pro hockey, pro soccer, and the WNBA all posting double-digit Y/Y growth simultaneously, this category should be on every brand's 2026 sponsorship plan.

Individual and Motor Sports

How the 7 individual sports leagues are trending — Total Fans, Live Attendance, and Viewership, 2023 → 2025.



The trend line reflects the percentage change between 2024 and 2025, with 2024 as the baseline.

Formula 1 is in a category of one.

Across 7 leagues, growth is mostly modest — except for one. Formula 1 grew faster than every other individual sport on every metric, and now sits within striking distance of MMA and NASCAR.

330M

Total Fans, 2025

+7.3%

3-yr Total Fans growth

+31.3%

3-yr Live Att. growth

+148.9%

F1 3-yr Live Att.

1 Formula 1 grew in every single metric

F1 added Total Fans +21.2% Y/Y, Live Attendance +55.1%, and Viewership +20.5% — the only league in this group to lead on all three. The U.S. now hosts 3 races (Miami, Austin, Vegas), Drive to Survive is in its 7th season, and the fan economics have followed.

+21.2% F1 Total Fans Y/Y

2 Indy Car is quietly riding F1's coattails

Indy Car grew +12.9% Total Fans and +31.1% live attendance Y/Y — strong growth that mirrors F1's. The motorsport halo is real: when F1 brought motorsport back into U.S. cultural conversation, the entire racing category benefited.

+31.1% Indy Car Live Att.

3 MMA is the only declining individual sport

MMA fans dropped -2.2% Y/Y and viewership fell -2.9% — the only league in this group to decline on either metric. Live attendance still grew (+12.7%), suggesting the in-arena product is healthy but the broader fan base is plateauing.

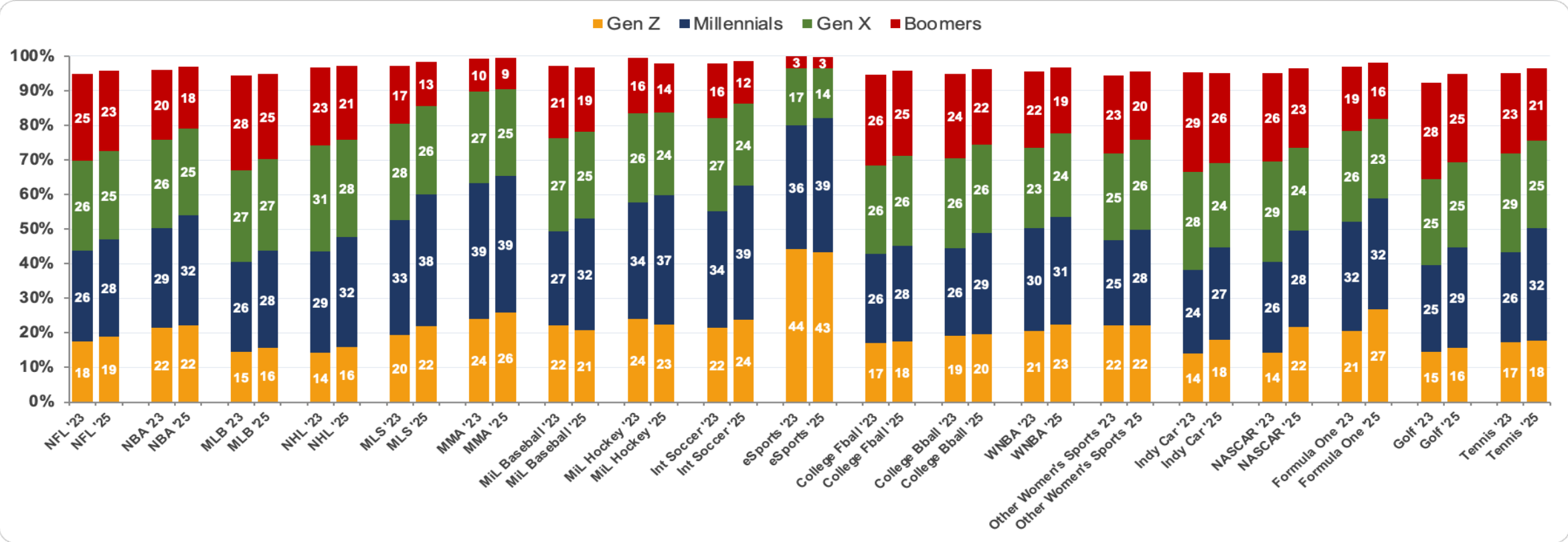
-2.2% MMA Total Fans Y/Y

BOTTOM LINE Motorsport is having a moment — F1 leads, Indy Car follows, NASCAR is steady. Brands targeting affluent and globally-minded fans should be evaluating motorsport sponsorship now, before the 2026 World Championship cycle compounds these gains.

6

Generation Game: How Each Age Cohort Consumes Sports

Generation share of fanbase, 2023 vs. 2025 — paired bars per league.



READING THE CHART: Each league has two bars side-by-side — '23 then '25 — showing the share of fans in each generation. Source: SBRnet Study of Sports Fandom, 2026

Millennials are now the dominant sports generation — and Boomers are losing ground fast.

Across all 19 leagues we measure, Millennials gained +4 percentage points of fan share in just one year while Boomers lost nearly -3 — the largest generational re-mix we have observed in the SBRnet panel.



1 Gen Z lives in eSports — and is moving into motorsport

eSports is in a class of its own with 43% Gen Z fans — 2x the next-highest league. But the more interesting story is where Gen Z is growing fastest: Indy Car (+3.3pp Y/Y), WNBA (+3.2pp), and NASCAR (+3.0pp). Drive to Survive and the Caitlin Clark effect are converting young viewers into year-round fans.

+3.3pp Indy Car Gen Z share gain Y/Y

2 Millennials are the new median sports fan

Millennials make up the largest generational share in 14 of 19 leagues. They are most concentrated in MMA (40%), Int'l Soccer (39%), MLS (39%), eSports (39%), and MiL Hockey (38%). For brands, this is the demographic center of gravity — and it gained +4pp of share in the last 12 months.

14 of 19 Leagues where Millennials lead

3 Boomers still anchor the legacy leagues — but the floor is shifting

Boomers remain the strongest in Indy Car (27%), Golf (27%), MLB (26%), College Football (26%), and the NFL (24%). But all five lost Boomer share Y/Y. As the generation ages out, the leagues with the heaviest Boomer dependency face the steepest replacement challenge.

-2.6pp Avg Boomer share decline Y/Y

BOTTOM LINE Sports fandom is undergoing a generational re-shuffle — not a slow drift. In a single year, Millennials moved from co-dominant to dominant, and the next decade of media rights, sponsorship value, and league strategy will be decided by which leagues replace their Boomer base fastest.

Beyond Watching: How Fans Engage With Sports.

Sports fandom in 2025 is no longer just about who watches and who attends. It is increasingly about what fans DO with their fandom how they bet, buy, respond to brands, and give back. The following slides shows holistic data and analysis regarding modern fan behavior by SBRnet.

01

Sports Gambling

Penetration of legal sports betting across each league's fanbase — and which fan groups are most actively wagering.

02

Licensed Merchandise

Total and per-fan spending on licensed apparel — the most direct measure of fan-to-revenue conversion for any league or team.

03

Sponsorship Influence

Share of fans who report being influenced by team or league sponsors when making purchasing decisions.

04

Philanthropy & GiveDex

Fan donation behaviors, plus an introduction to GiveDex — SBRnet's new index for measuring the giving intensity of every league and team.

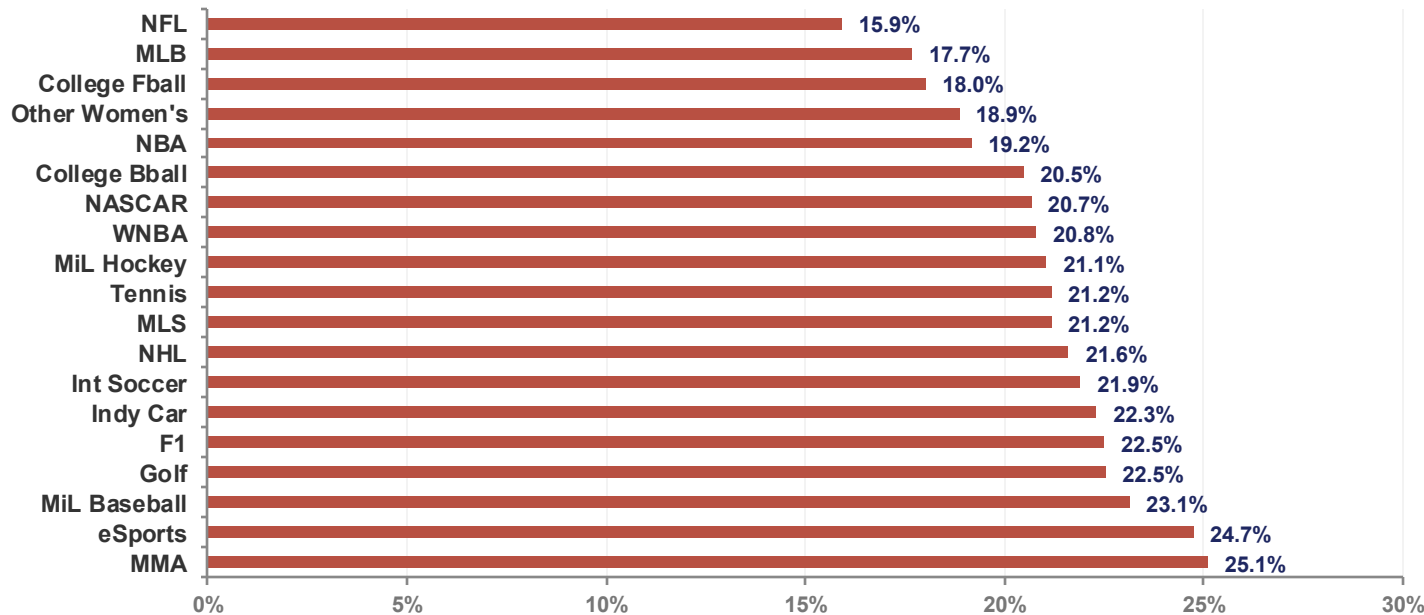
WHY IT MATTERS These four behaviors directly drive league revenue, brand sponsorship pricing, and the long-term commercial value of every fanbase.

1 in 5 sports fans now gamble on sports and the rate spikes for action sports.

Penetration of legalized sports betting across each league's fanbase, 2025.

Gambling Penetration by League

% of each league's fans who report betting on sports



WHAT THE DATA SAYS

Gambling clusters around action sports and motorsport, not the Big 4.

- ◆ MMA leads at 25.1%, combat-sport fans are 1.6x more likely to bet than NFL fans (15.9%).
- ◆ eSports (24.7%), MiL Baseball (23.1%), and motorsport (Golf/F1 22.5%, Indy Car 22.3%) round out the top tier.
- ◆ The NFL has the most gamblers in absolute terms (29.3M) but the lowest penetration of any major league.
- ◆ An estimated 269M U.S. fans gambled across the 19 leagues in 2025.

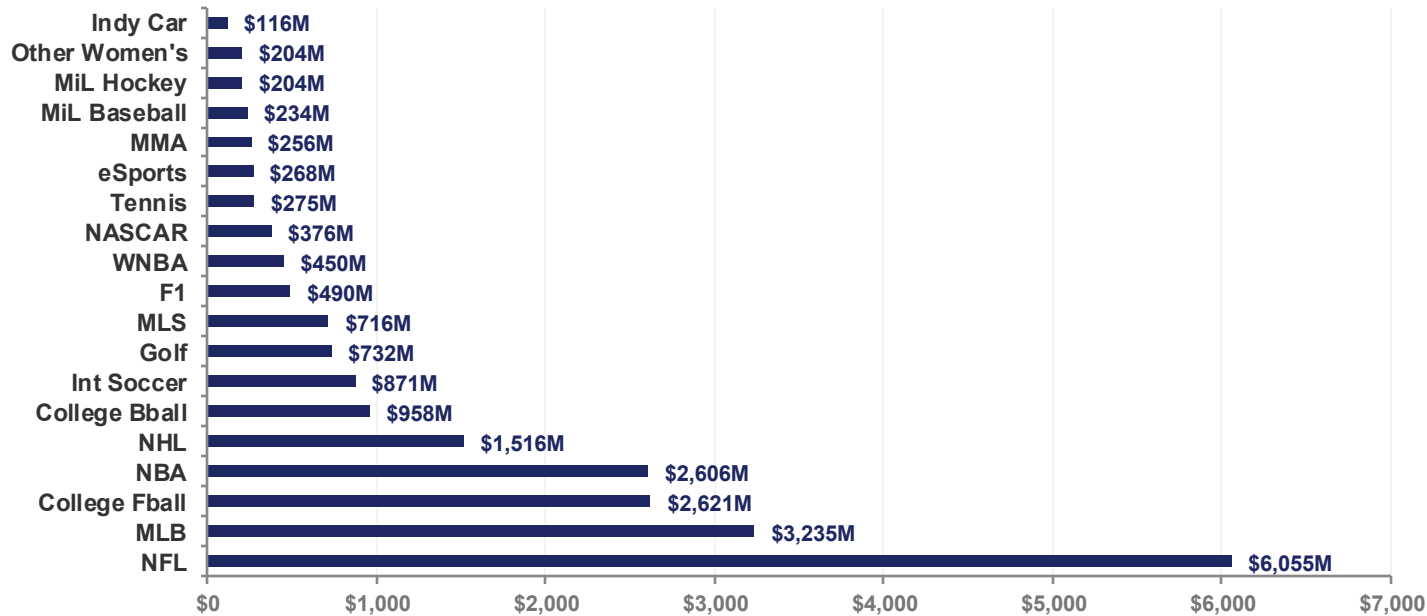
TAKEAWAY Brands targeting the sports-bettor consumer should look beyond the NFL — combat sports, eSports, and motorsport are where the most engaged bettors already are.

U.S. fans spent \$22 billion on licensed sports apparel in 2025.

Total spending on licensed sports logo apparel by league, 2025. The NFL alone took 27%.

Licensed Merchandise Spend by League

Total fan spending on licensed apparel (\$M)



WHAT THE DATA SAYS

The NFL dominates total spend; MLB leads on per-fan intensity.

- ◆ NFL fans spent \$6.05B on apparel, 27% of total industry spend, 1.9x MLB and 2.3x the NBA.
- ◆ On a per-fan basis: NFL \$33, MLB \$24, NBA \$21, College Football \$20, NHL \$18.
- ◆ College Football (\$2.62B) overtook the NBA (\$2.61B) in absolute spend for the first time.
- ◆ Tennis (\$4.62/fan) and Indy Car (\$3.45/fan) have the lowest merch monetization in the study.

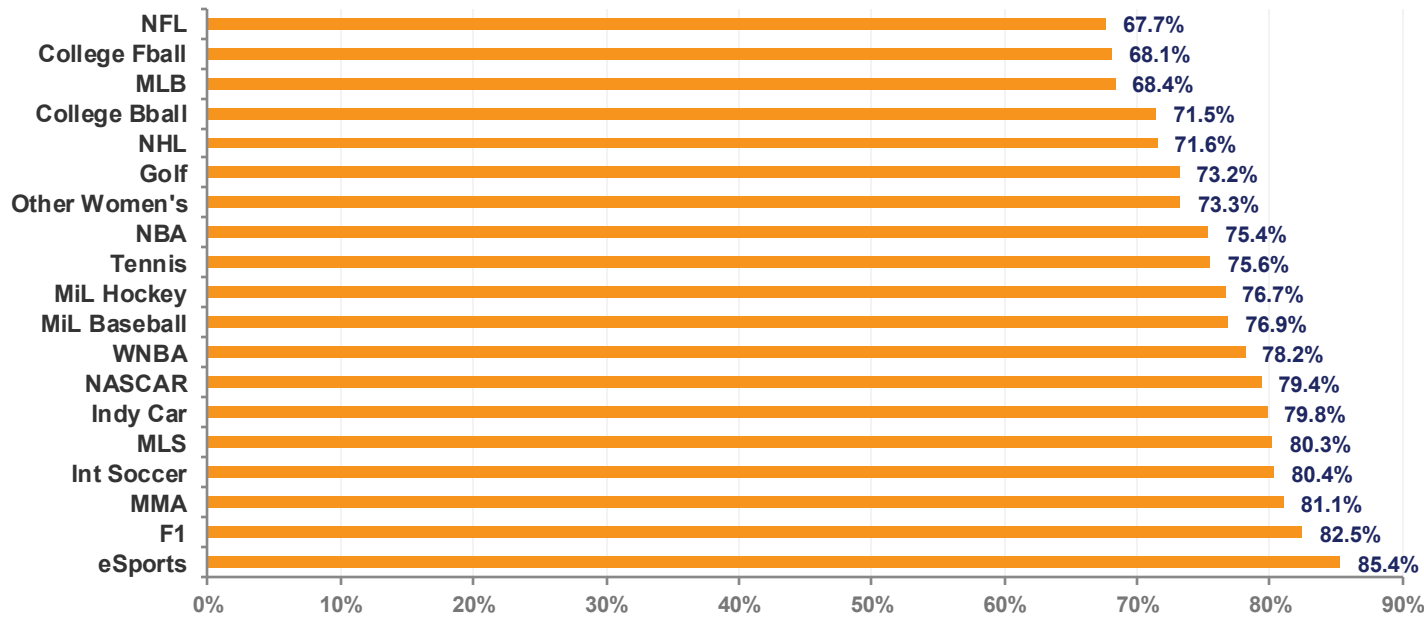
TAKEAWAY The NFL converts every fan into ~\$33 of apparel — the per-fan benchmark every brand and rights holder should measure against.

73% of all U.S. sports fans say sponsorship influences their purchases.

Share of each league's fans who report being influenced by team or league sponsors, 2025.

Sponsorship Influence by League

% of each league's fans influenced by sponsors



WHAT THE DATA SAYS

Smaller, newer, faster-growing leagues outperform the Big 4 on sponsor recall.

- ◆ eSports (85.4%), F1 (82.5%), MMA (81.1%), Int'l Soccer (80.4%), and MLS (80.3%) lead the field.
- ◆ The Big 4 traditional leagues all rank in the bottom half: NFL 67.7%, MLB 68.4%, College Football 68.1%, College Basketball 71.5%.
- ◆ Ad-cluttered legacy leagues show diminishing sponsor returns; emerging leagues deliver higher-impact recall.
- ◆ Across all 19 leagues, ~996M instances of sponsor influence were reported in 2025.

TAKEAWAY Sponsor impact and fan-base size are inversely correlated — brands seeking the highest message recall per dollar should over-weight eSports, F1, and MMA.

7

Introducing Sports Fan 360

Sports Fan 360

Measuring the modern sport fan through **9 cutting edge fan engagement behaviors.**

Sports Fan 360 is a data-driven framework that quantifies fan engagement by combining **9 behavioral metrics** with rich demographic insight — helping teams, leagues, and sports organizations identify which fan segments represent the greatest opportunity for growth. Each fan receives a **FanDex** score that places them on the engagement pathway.

Nine Fan Behaviors





 01 Travel for Sport	 02 Live Attendance	 03 Merchandise Purchase
 04 Fantasy Sports	 05 Sports Gambling	 06 Sport Viewership
 07 Social Media Engagement	 08 Sponsor Influence	 09 Sport Philanthropy

The FanDex Engagement Pathway



DASHBOARD ACCESS

Connect FanDex scores to **who fans really are.**

 Age	 Generation
 Gender	 Race
 Geographic Region	

THE STRATEGIC VALUE

How teams, leagues & brands **put FanDex to work.**

- 1 Identify Growth Segments**
Pinpoint passive fans who represent the largest untapped audience for conversion.
- 2 Design Precise Strategies**
Build activation and CRM campaigns tailored to each engagement tier.
- 3 Benchmark Fan Segments**
Compare FanDex scores across demographics to surface affinity strengths and gaps.
- 4 Prove Fan-Base ROI**
Give sponsors and leadership a defensible, repeatable engagement metric.

7

Who the Sports Fan 360 is For?

1 Sponsors and Brands

Validate audience quality and prove ROI for sponsorship investments.

2 Leagues

Strengthen negotiations for media rights and partnership renewals

3 Team and Venues

Convert "Passive" observers into "Active" ticket-buying and attending loyalists.

4 Marketing Agencies

Optimize resource allocation through hyper-personalized demographic targeting

5 Academic Community

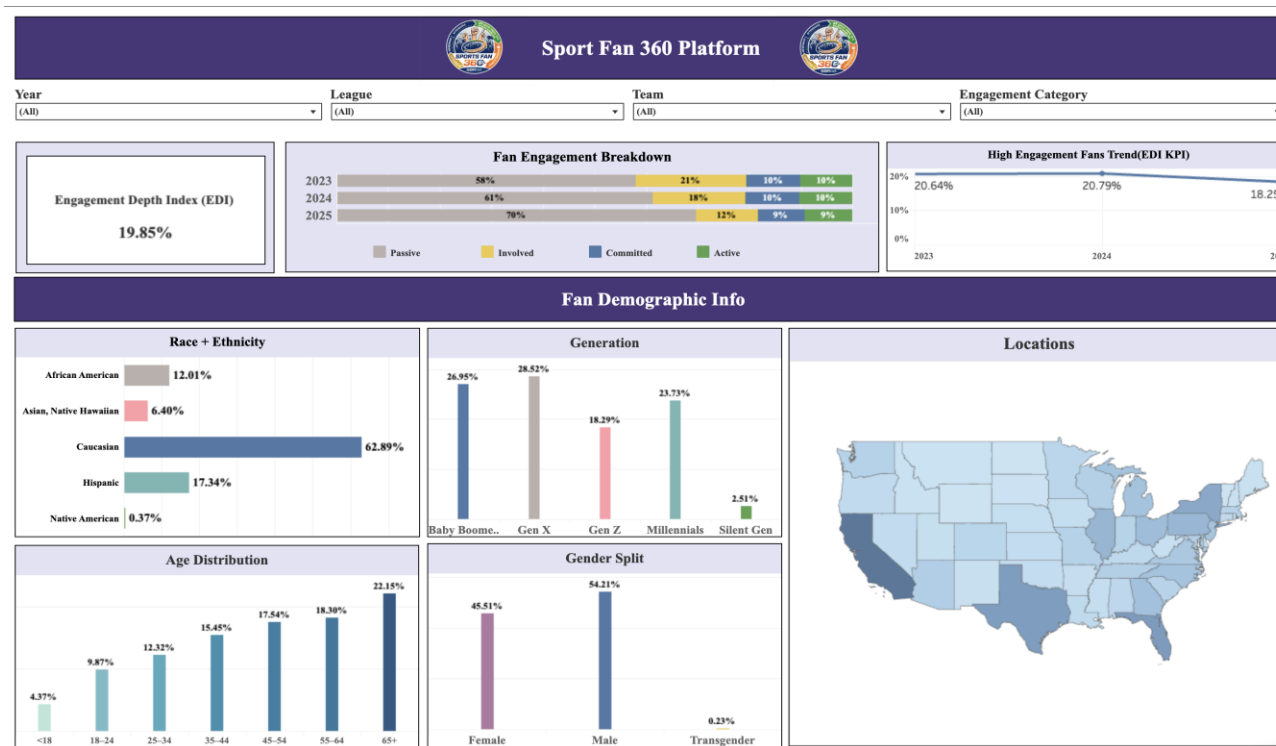
behavioral framework for advanced consumer research.

7

What You Can Do With Sports Fan 360 Platform

Sport Fan 360 Dashboard — 2023-2024-2025

Live dashboard at SBRnet — interactive league/team/year/engagement Category filtering



ABOUT THE PROJECT

A new SBRnet index that benchmarks the giving intensity of every league and team.

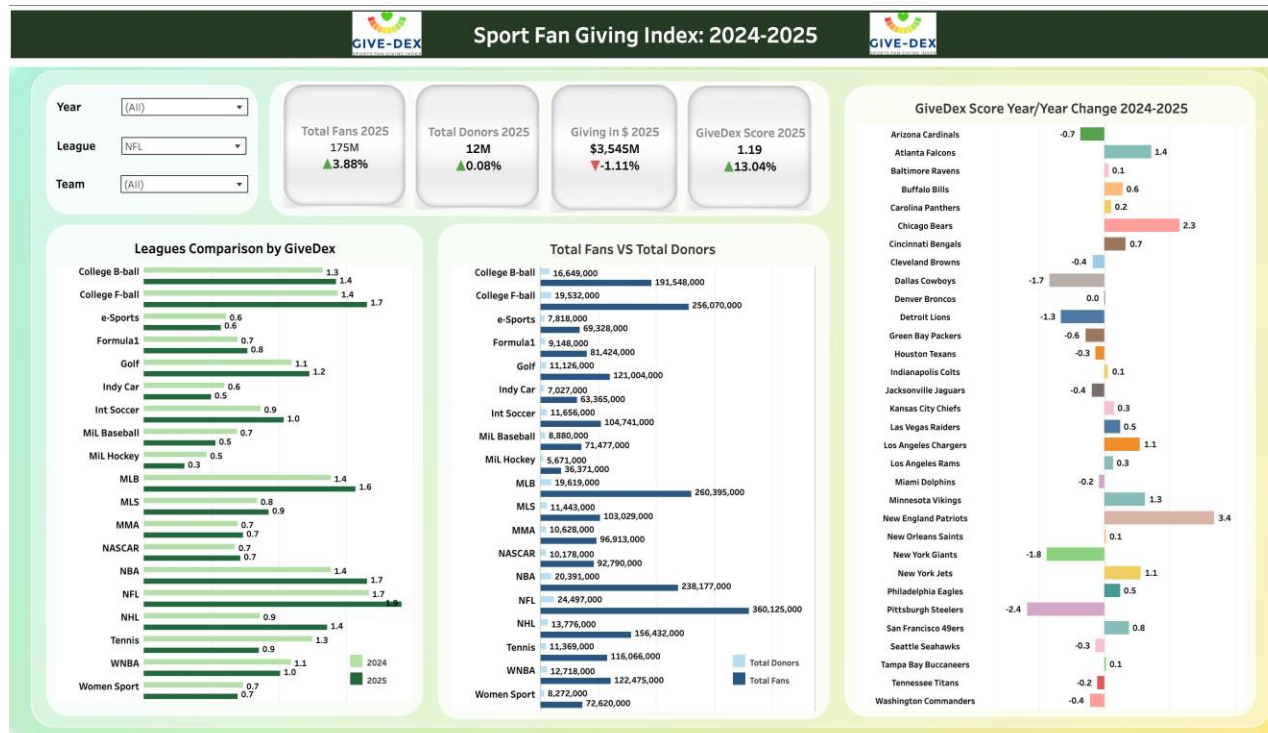
- ◆ Based on the dashboard, users can select the year (2023, 2024, or 2025), league (19 leagues in US), team, and fan engagement category (Passive, Involved, Committed, or Active).
- ◆ Based on these selections, they can view fan engagement scores along with fan demographic information.
- ◆ If you are interested in a demo, please do not hesitate to contact us.

Introducing GiveDex: SBRnet's new Sports Fan Giving Index.

GiveDex measures and benchmarks the philanthropic intensity of each league's and team's fanbase. Above 1.0 = above-average giving.

GiveDex Dashboard — 2024-2025

Live dashboard at SBRnet — interactive league/team/year filtering



ABOUT THE PROJECT

A new SBRnet index that benchmarks the giving intensity of every league and team.

- ◆ GiveDex is built on the SBRnet annual fan study, which captures both the number of fans who donate and the dollar volume those donations represent for each league and team.
- ◆ An index of 1.0 means a fanbase gives at the national average; above 1.0 means above-average giving intensity; below 1.0 means below-average.
- ◆ The interactive dashboard lets users filter by year, league, and team to see how giving compares, and how it has shifted year over year.

TAKEAWAY GiveDex turns philanthropy into a measurable, brand-and-team-specific KPI — so sponsors and rights holders can identify the most charitably active fanbases.



T H A N K Y O U

Get In Touch

Reach out to discuss the data, the methodology, or how to put it to work.

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