

NFL FANS

Profiling the demographics, attitudes
and digital behaviors of NFL fans

GW AUDIENCE REPORT

Q1 2015

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INTRODUCTION

GWI Audience reports examine the digital behaviors and demographic profiles of key interest groups.

With Super Bowl XLIX rapidly approaching, this report places a spotlight on the NFL's American and global fans, dividing them into the following categories:

- NFL Fans – those who say they follow the NFL in some form
- NFL TV Viewers – those who watch games on television
- NFL Online Viewers – those who watch games online

Drawing on our most recent wave of research (among 7,500 online adults aged 16-64 in the US, and 41,983 online adults globally), we offer insights on:

- The demographic and geographic breakdown of NFL fans
- Their attitudes, interests and digital behaviors
- Their favored social networks and activities

Clients can explore the digital characteristics of NFL fans further by building an audience on the PRO Platform – tailoring any element of the definition as required.

KEY TRENDS AND NUMBERS

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- In the US, **65% of adults say they follow the NFL in some form**, with 56% watching games on television and 9% tuning in via the internet.
- But it's popular outside of the US too; globally, 38% of adults are fans, with particularly notable peaks in Mexico, India and China. **Overall, that means there are 4 times as many NFL fans in the rest of the world as there are in America.**
- American men (74%) are more likely than women (56%) to be fans, while 25-34s are the leading age group. **16-24s in the US are the least likely age group to watch NFL games on TV but are among the *most* likely to watch online.**
- **More than 50% of NFL fans also follow the Olympics, Major League Baseball and the NBA.** However, only small minorities play any of the country's major sports – with the biggest sporting activity being swimming (20%).
- Majorities of NFL fans in America **express a strong interest in music, food and films**, with the figures typically peaking among online viewers.
- **NFL fans in the US are nearly 20% more likely than average to say they tend to buy brands they see being advertised** – giving yet more context for why ads aired during the Super Bowl are so important.
- **Nearly three quarters of NFL fans own a smartphone and over half have a tablet.** Small but still important groups say they personally own a smartwatch or smart wristband (7% each).
- **Four fifths of NFL fans in the US are second-screeners**, with laptops (44%) and cell phones (40%) being the top devices. The most popular reasons for dual-screening are checking social networks and playing games (about a third each).
- **Facebook remains the top social network**, and by quite some distance: 83% of NFL fans in the US have an account and nearly half (49%) are active users.
- On average, **NFL fans spend 1.81 hours per day on social networks.** Mobiles are now capturing 1.79 hours.

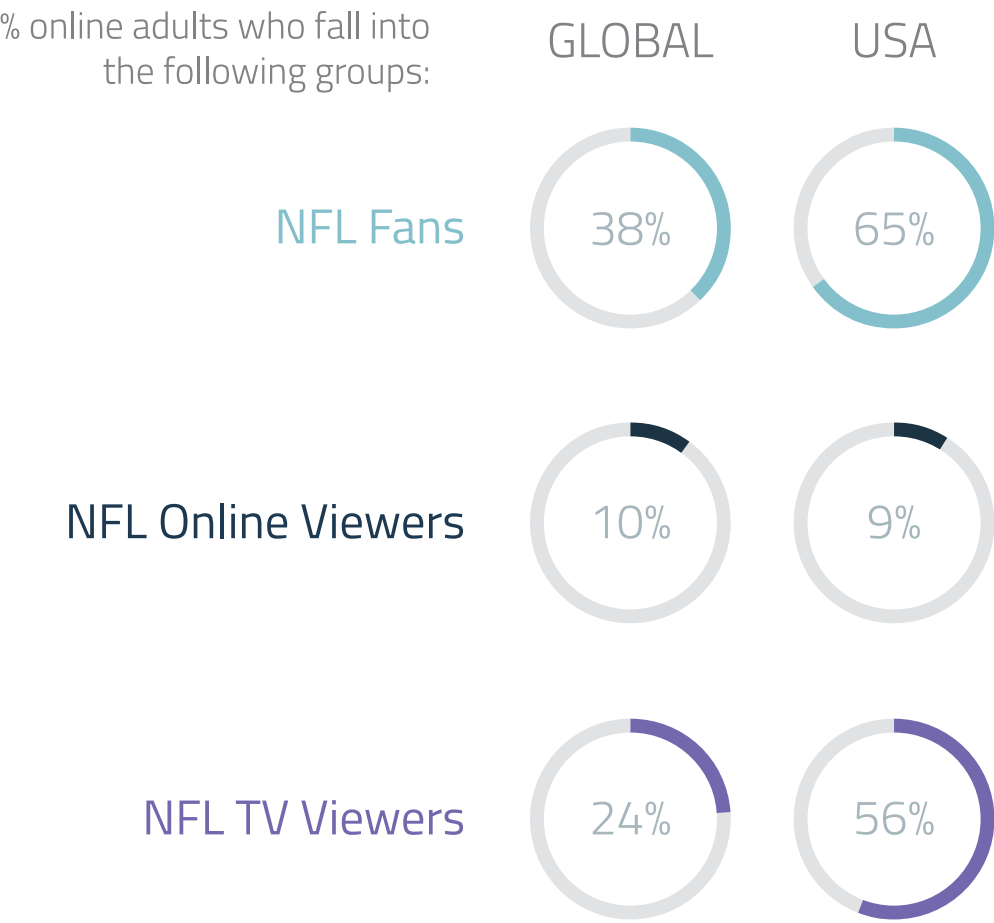
PROFILING NFL FANS

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NFL FANS BY COUNTRY

Within the US, close to two thirds of adults describe themselves as NFL fans – with 56% saying they tune in to games on television and a further 9% reporting that they watch them via the internet.

Chart 1: Profiling NFL Fans

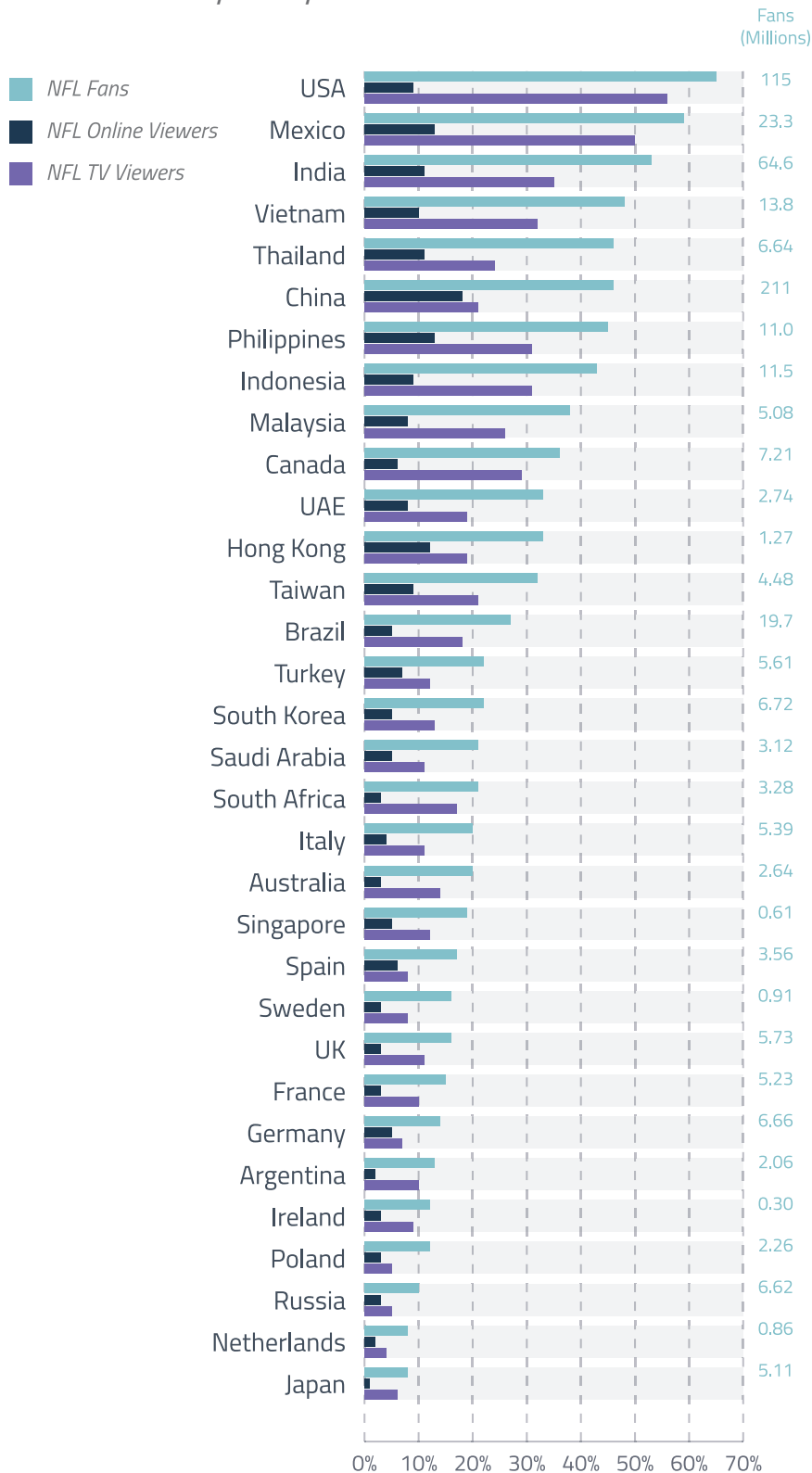


Question: Which of the following sporting leagues do you follow, watch on TV, watch online or watch live in person? National Football League (NFL) // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users aged 16-64

 Want to explore this data on the PRO Platform? Click on **Personal Profiling > Sports > Following Sports Leagues**

As we would expect, the global figures – which reflect an average across GlobalWebIndex’s 32 countries – are considerably lower than this. Nevertheless, it’s still 38% who say that they are an NFL fan, confirming that the sport now has a truly worldwide following. **In fact, there are nearly 4x as many NFL fans in the rest of the world as there are in America.**

Chart 2: NFL Fans by Country



Look at the figures on a country-by-country basis and its obvious popularity in some other markets is clear to see. While the US understandably tops the table, more than 50% in both Mexico and India also describe themselves as fans. **What's more, there are 12 countries where more than 1 in 3 adults are NFL fans, with the figure dropping below 10% in just two countries.**

When we convert these percentages to millions, the US naturally contains one of the biggest audiences but there are also vast fan-bases in countries such as China and India. In China, some 18% say that they're watching NFL games via the internet, reflecting just how important online content consumption has become in parts of APAC, as well as the trend towards using VPNs (Virtual Private Networks) in order to access content which is not available in one's own country. It's certainly telling that **16% of VPN users outside of the US say they have watched NFL games online, rising to 26% in China.**

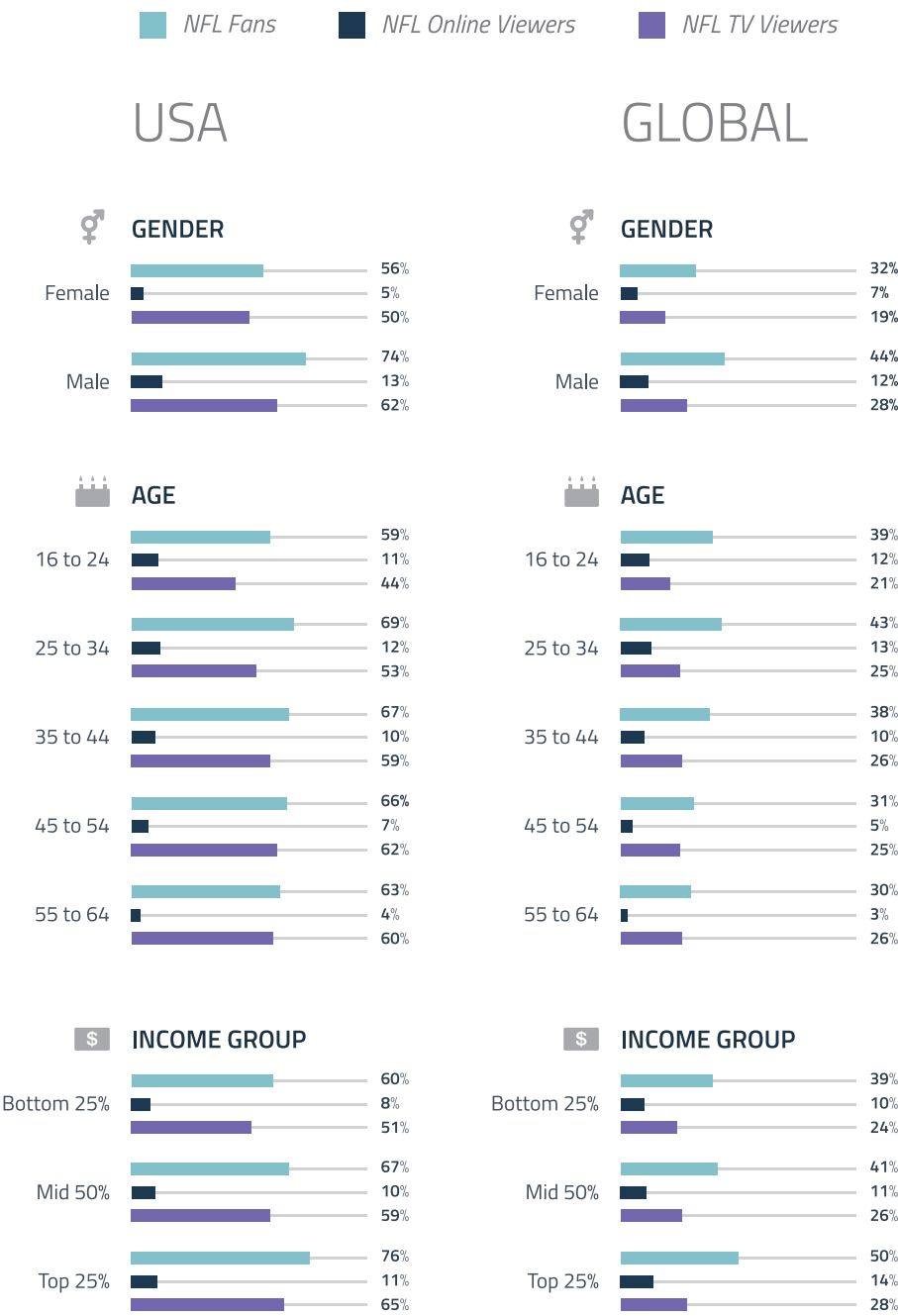
Question: Which of the following sporting leagues do you follow, watch on TV, watch online or watch live in person? National Football League (NFL) // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users aged 16-64

Want to explore this data on the PRO Platform? Click on **Personal Profiling > Sports > Following Sports Leagues**

THE DEMOGRAPHICS OF NFL FANS

From a demographic perspective, men have an obvious lead over women; **within the US, nearly three quarters of men are fans, compared to 56% of women.** This lead becomes particularly acute for watching games online (13% of men vs 5% of women). Similar patterns are repeated globally.

Chart 3: NFL Fans by Demographics

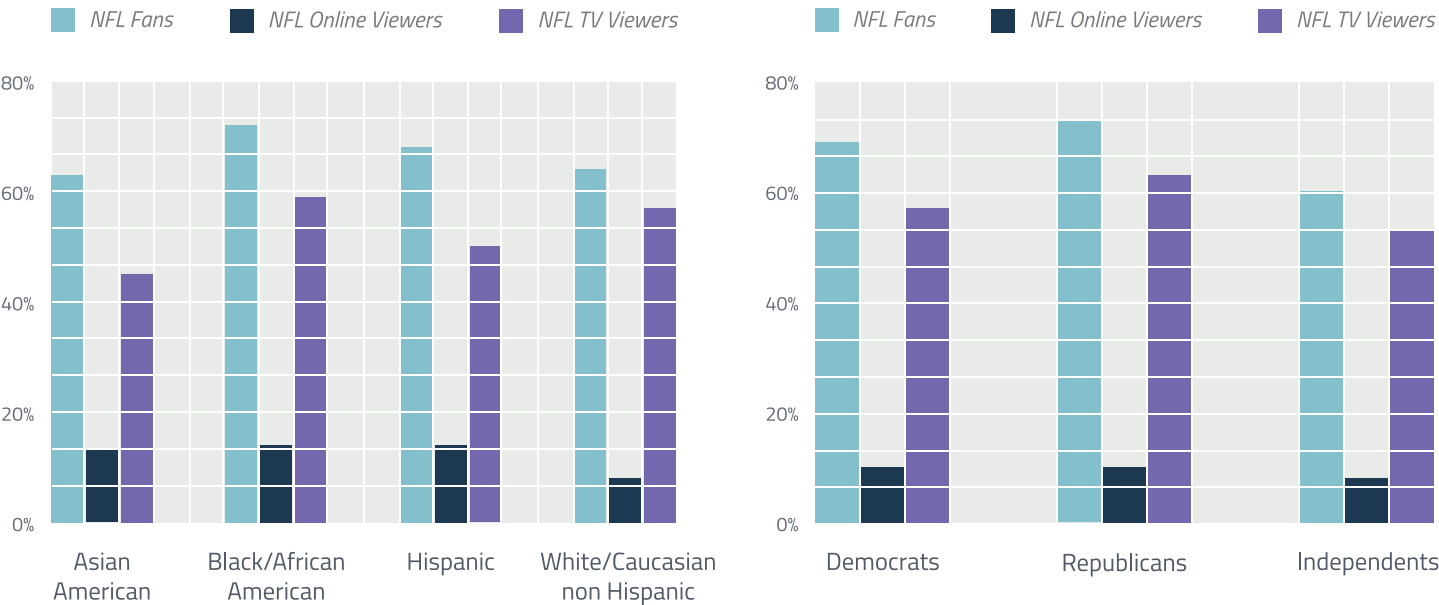


By age, it is 25-34s in the US who are most likely to be fans, with 16-24s scoring the lowest figures of any age group (59%). There's a key difference in terms of viewing behaviors here, though: 16-24s are some of the *most* likely to watch games online but are the least likely to tune in via television. As with other media behaviors, then, there's little doubt that this age group is at the forefront of the migration to online. For online/TV viewers, similar patterns are seen globally, too.

In terms of income, there are predictable peaks to be seen worldwide as well as within the US; in both cases, **the likelihood of being an NFL fan or viewer increases directly in line with wealth levels.**

Further differences emerge across two of the US-specific demographic measures tracked in the GlobalWebIndex survey. Asian Americans are the least likely to be fans or TV viewers but, along with Black/African and Hispanic Americans, are the most likely to be watching games online. **Overall, the biggest fans are Black/African Americans, nearly three quarters of whom are following NFL games in some form.**

Chart 4: NFL Fans by Ethnic Background and Political Affiliation



Question: Which of the following sporting leagues do you follow, watch on TV, watch online or watch live in person? National Football League (NFL) // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on **Personal Profiling > Sports > Following Sports Leagues**

If we switch our attention to political affiliation, the Democrats and Republicans score relatively similar figures, putting both groups considerably ahead of Independents.

ATTITUDES, INTERESTS AND ENGAGEMENT WITH SPORT

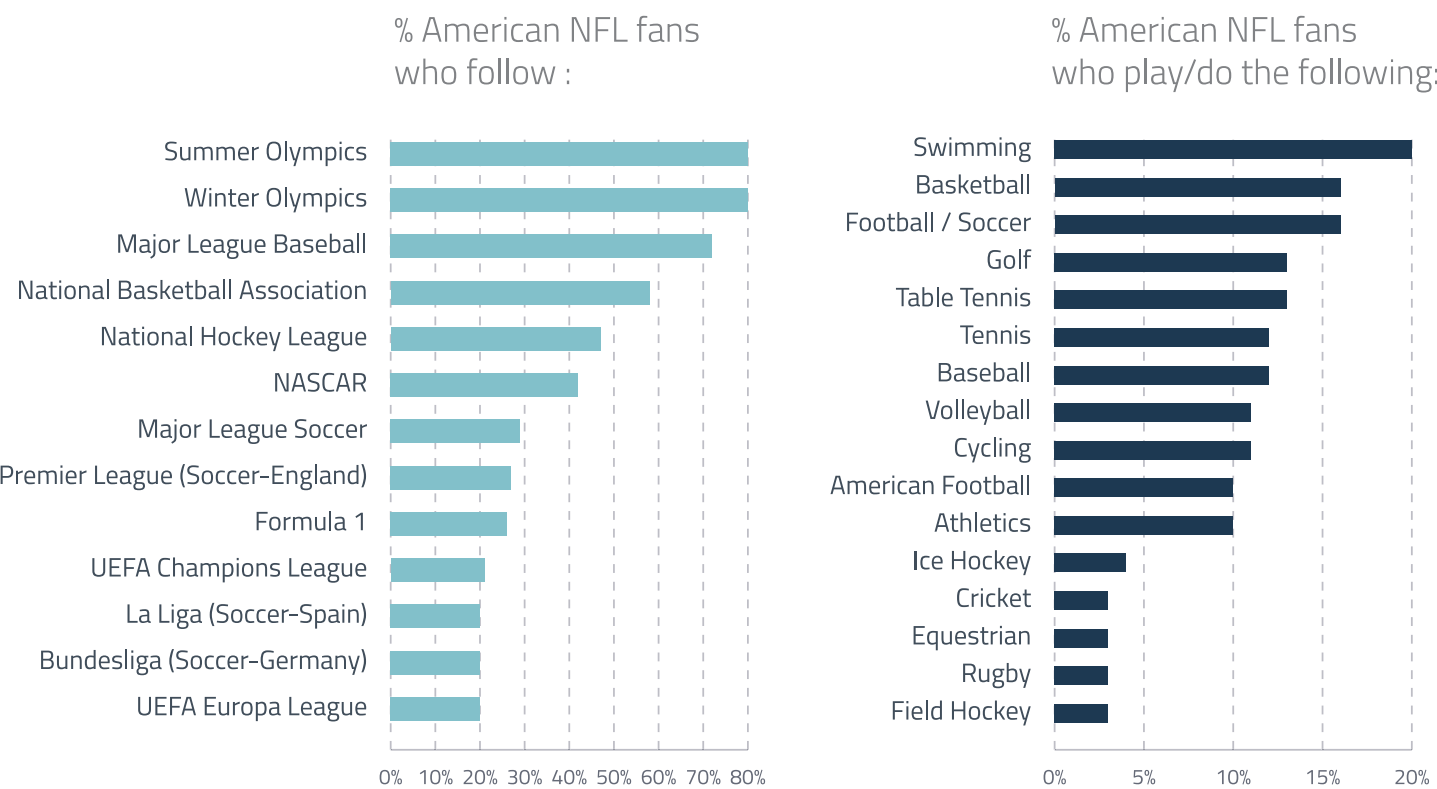
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SPORT: WATCHING VS PLAYING

NFL fans don't confine themselves to following just American football; **majorities are also fans of the Olympics, Major League Baseball and the NBA.**

What's more, significant minorities are keeping up with the National Hockey League, NASCAR, Major League Soccer and a number of European soccer tournaments or leagues.

Chart 5: Engagement with Sport among NFL Fans



Question: Which of the following sporting leagues do you follow, watch on TV, watch online or watch live in person? ■ Which of the following sports do you play in person? // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on **Personal Profiling > Sports > Following Sports Leagues OR Participation in Sports**

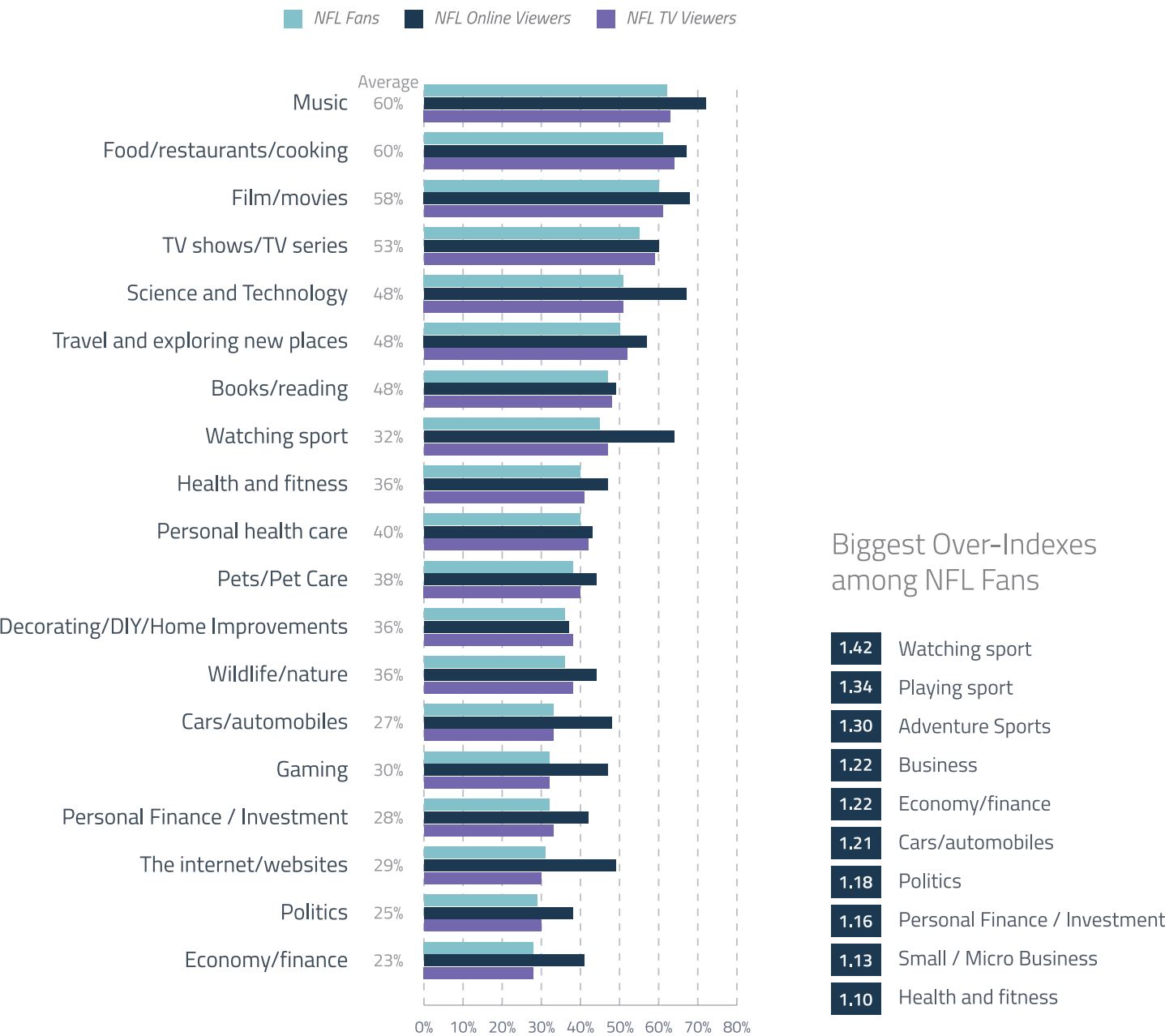
As our chart shows, **there's a clear disconnect between watching and participating:** only relatively small numbers say that they play/take part in sport/sporting activities themselves, with swimming topping the list at 20%. That said, they are ahead of the average American for all 16 of the sporting activities tracked in our chart. Unsurprisingly, **NFL fans over-index most strongly for playing American football; 10% say they do this, putting them 40% ahead of the national average.**

NFL FANS MOST INTERESTED IN MUSIC, FOOD AND FILMS

With the Super Bowl heralding one of the most important (and expensive) advertising moments of the year, GWI's data shows that NFL fans are most likely to express a strong interest music (62%), food (61%) and films (60%), with the figures rising even higher among NFL TV viewers. In most cases, we see the highest percentages of all among online viewers – driven in part by their younger age profile and hence more diverse set of interests.

If we look at where NFL fans over-index the most compared to the national average, there's a predictable emphasis on sport (with watching/playing sport coming top, followed by adventure sports). That the NFL fan audience is skewed towards affluent males finds further reflection in the rest of the list: business, finance, cars and politics are all of much greater interest to NFL fans than to the American population generally.

Chart 6: NFL Fans: Top 20 Interests



Question: Here is a list of topics that may interest you. Can you please indicate which of these you are strongly interested in? // Source: GlobalWebIndex Q4 2014 // Base: Internet Users in the USA aged 16-64

80% OF NFL FANS LOOKING FOR THE BEST DEALS

GlobalWebIndex's survey tracks more than 60 different attitudes and self-perceptions. When we assess the most popular of these among NFL fans, **the desire to find the best deals** is the joint top response. Clearly, then, NFL fans are absolutely in line with the US trend towards savvy shopping.

Chart 7: NFL Fans: Top 20 Attitudes

% NFL fans who agree with the following statements



Biggest Over-Indexes among NFL Fans

- 1.18** I feel positive about the global economy
- 1.18** I would buy a product/service simply for the experience of being part of the community built around it
- 1.18** I tend to buy brands I see advertised
- 1.18** I am comfortable borrowing money
- 1.17** I feel positive about the future of the environment
- 1.17** My favorite brand plays an integral part in my online life and experience
- 1.16** I would consider myself to be much more affluent than the average
- 1.15** Having the latest technological products is very important to me
- 1.15** I like to keep up with the latest fashions
- 1.14** I am proactive about investing money

Question: To what extent do you agree/disagree with the statements below on your perception of yourself? // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on [Personal Profiling > Attitudes & Lifestyle > Self Perceptions](#)

Some of the most interesting results emerge when we compare responses among NFL fans with those from all Americans. Here, we see that **NFL fans are much more likely to buy brands they see advertised and are keener than average to keep up with the latest fashions and own the latest tech products.** They're also a positive group – feeling optimistic about the economy and the environment.

DIGITAL AND SOCIAL NETWORKING BEHAVIORS

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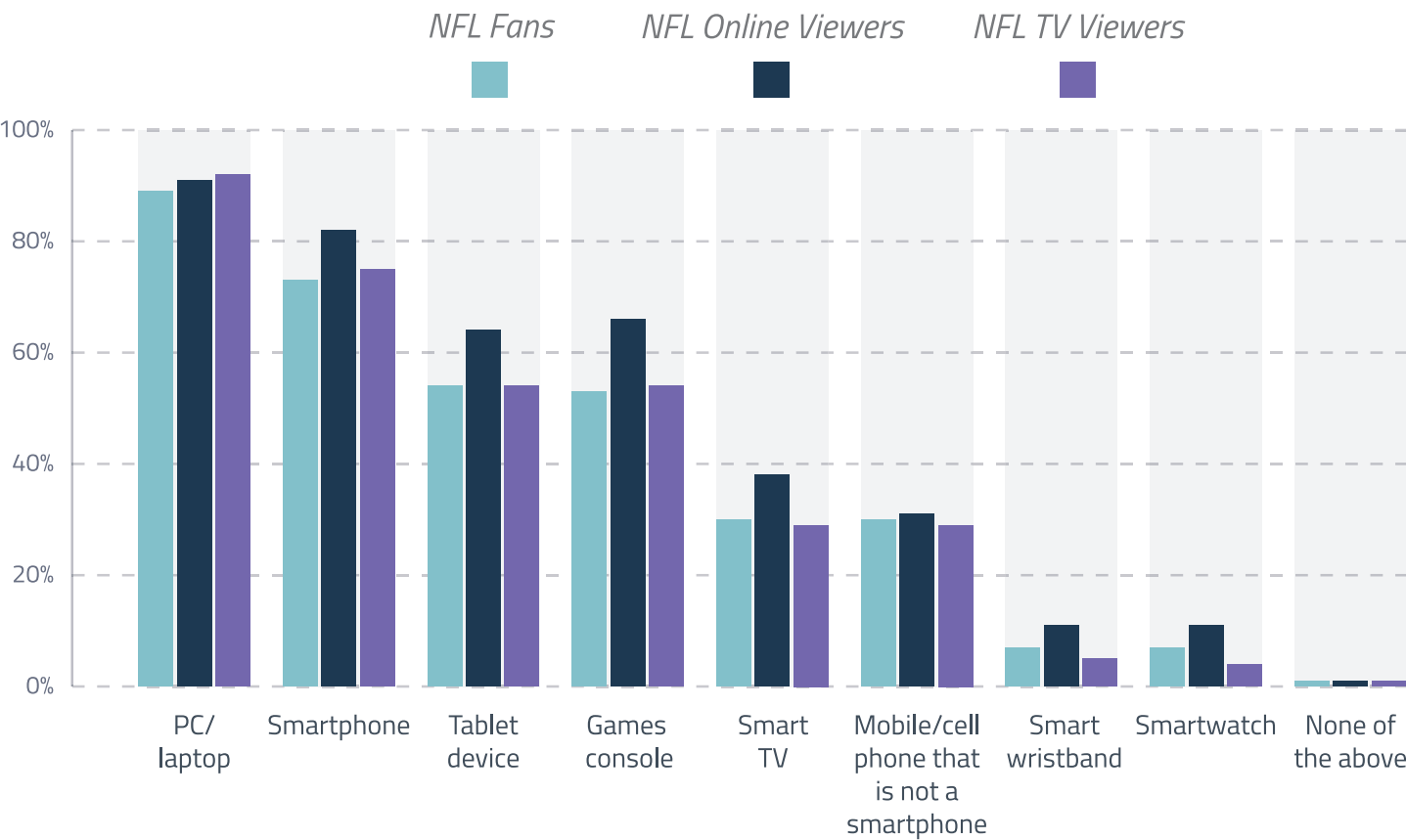
NEARLY 75% OWN A SMARTPHONE

NFL fans are a tech-equipped bunch; **close to three quarters personally own a smartphone and over half have a tablet**. Games consoles are also owned by more than half of this audience, with 53% saying they have one.

Arguably, though, it's the figures for wearables that are most interesting here – especially in light of the second-screen behaviors which we outline below. While still highly niche devices, **it's already 7% who say that they own a smartwatch or a smart wristband** (with considerable cross-over between these two groups: smartwatch owners are much more likely to also own a smart wristband, and vice versa).

Typically, **ownership figures peak among online viewers** - a result of this audience being the youngest of the three tracked in the chart. More than 80% among this group have a smartphone, while close to two thirds own a tablet.

Chart 8: Device Ownership



NOTE: respondents see the following definitions/illustrative examples
Smartphone: a phone that allows you to download apps, send/receive emails and browse the internet. Smartphones include iPhone, Blackberry and Android phones such as the Samsung Galaxy s5
Tablet: e.g. an Apple iPad, Samsung Galaxy Tab, Microsoft Surface, Google Nexus
Smart TV: a television that can connect to the internet
Smart Wristband: e.g. Nike Fuelband, Jawbone Up, Adidas miCoach
Smartwatch: e.g. Pebble, Sony Smartwatch, Samsung Galaxy Gear

Question: Which of the following devices do you personally own? // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on [Internet Landscape > Access Points > Device Ownership](#)

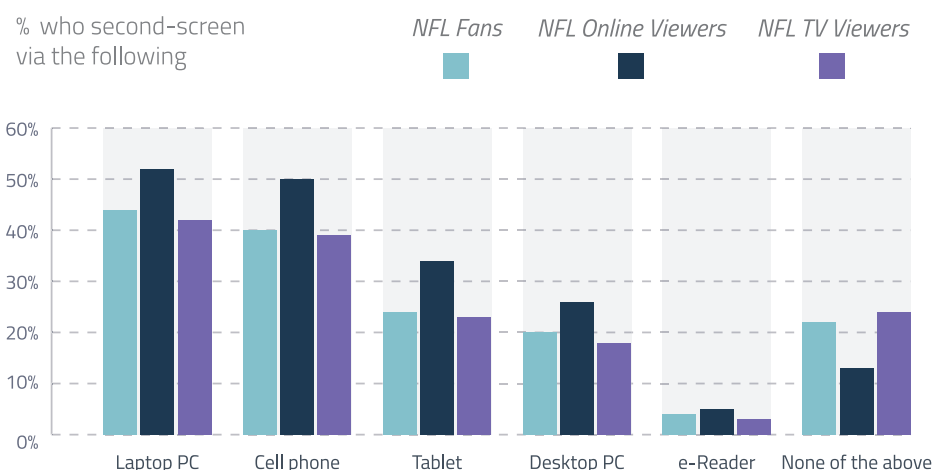
SECOND-SCREENING IS WIDESPREAD

Second- or dual-screening – also known as media multi-tasking – is an absolutely widespread behavior among NFL fans. **Just 22% say they have not done this while watching television, dropping to 13% among online viewers.**

Chart 9: Second-Screen Behaviors

Question: Which of the following devices have you used while watching TV? // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on **Media Consumption > Second-Screen Consumption > Multi-tasking - TV and Online**

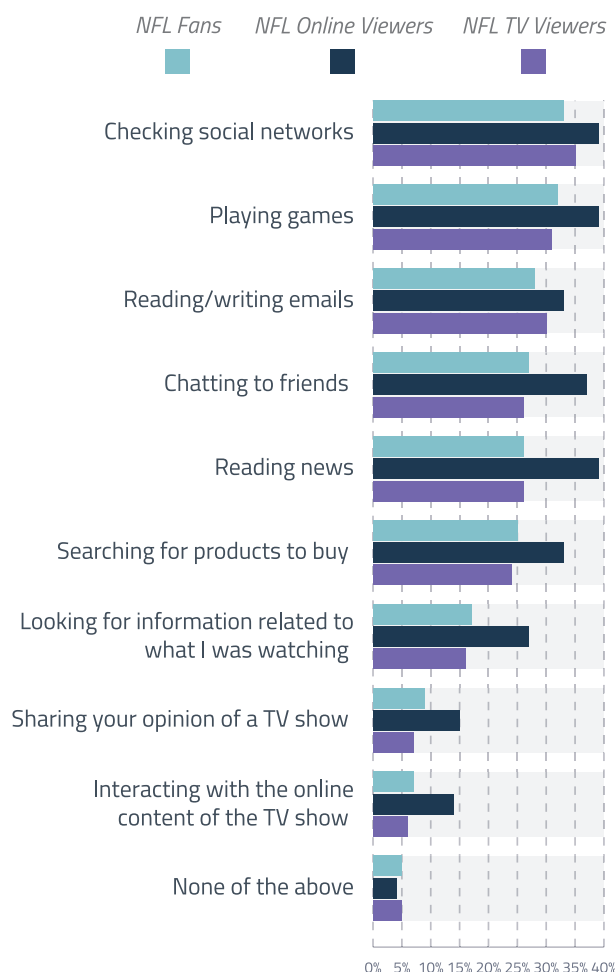


Laptops remain the top device – placing America at odds with the globally prevailing trend, where cell phones overtook laptops back in 2013. Nevertheless, cell phones have been experiencing consistent rises in recent years, and the gap separating them from laptops has been shrinking. It's also telling that cell phone second-screening is most popular among online viewers, the youngest of the three audiences being tracked. This group is also notably ahead of the others for using tablets.

The prevalence of second-screening among NFL fans becomes especially important when we look at top activities – **a third are checking social networks and about a quarter are chatting to friends or searching for products to buy.**

Most second-screen activities are rather "informal" in nature – that is, they are not related directly to the content being watched on the screen (with all of these options in fact coming at the end of the list). **The role of second-screen devices in facilitating conversations with friends and family is, however, an extremely strong one.**

Chart 10: Top Second-Screen Activities



Question: The last time you were watching TV and using the internet, which of the following were you doing? // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on **Media Consumption > Second-Screen Consumption > Second Screen Behaviors**

NFL FANS SPEND DAILY AVERAGE OF 6.32 HOURS ONLINE

The popularity of second-screening is one of the reasons why the average time spent on social networks, and online more generally, continues to show year-on-year rises in America.

Question: On a typical day, roughly how many hours do you spend on/doing the following? **Source:** GlobalWebIndex Q4 2014 **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Enter "Time Spent" in the free search box, or click [Media Consumption > Cross Media Consumption > Time Spent...](#)

On average, NFL fans say they spend 1.81 hours per day engaging with social networks. As a result, networking accounts for close to 30% of the total time (6.32 hours) that this audience spends online each day; that networking remains a fundamental part of daily media behaviors in the US is thus in little doubt.

Unsurprisingly, keeping in touch with news from friends is the top reason for using social networks. However, close to a third of NFL fans are using them in order to “stay up to date with news and current events” – with this being one of the areas where this audience over-indexes very strongly compared to the American average. As we saw during the World Cup during 2014, social networks are a major go-to point for real-time sporting conversations among the USA’s digital population.

Question: What are you main reasons for using social networking services? **Source:** GlobalWebIndex Q4 2014 **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on [Social Media > Social Network Services > Motivations to Use a Social Network](#)

Chart 11: Media Consumption among NFL Fans

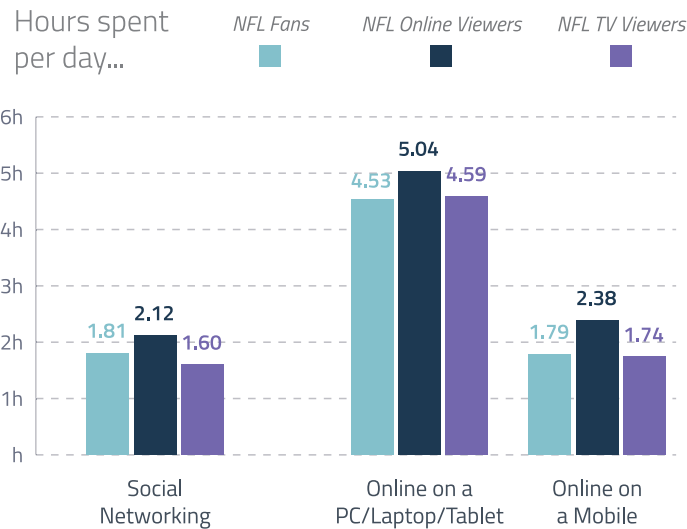
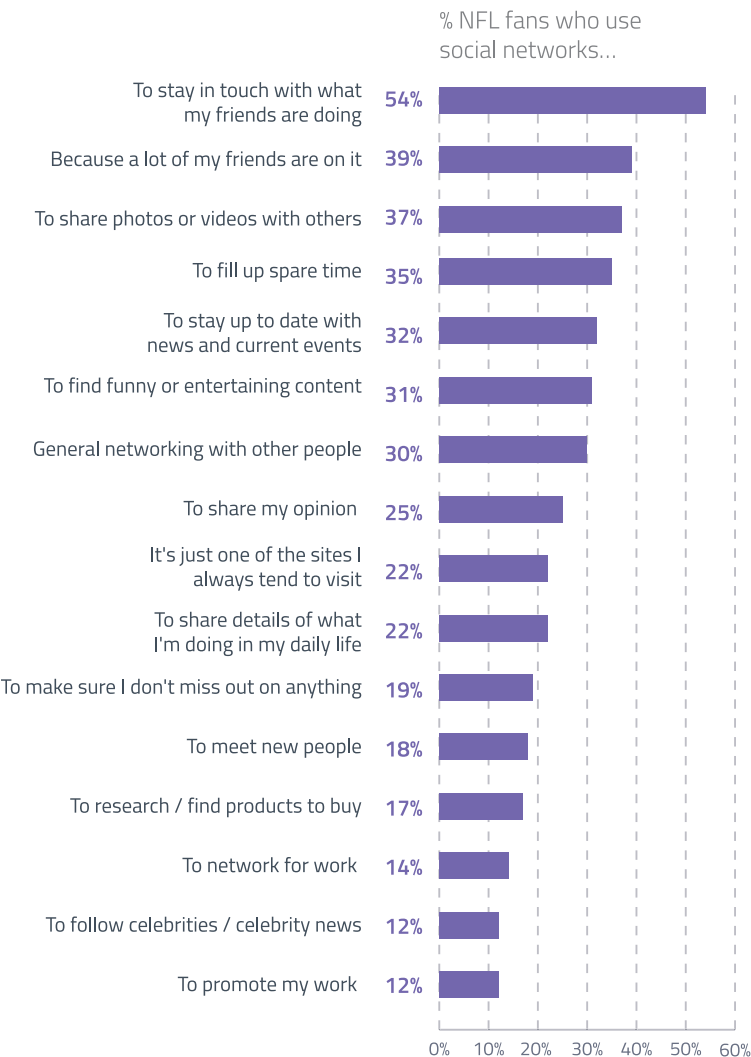


Chart 12: Social Networking Motivations

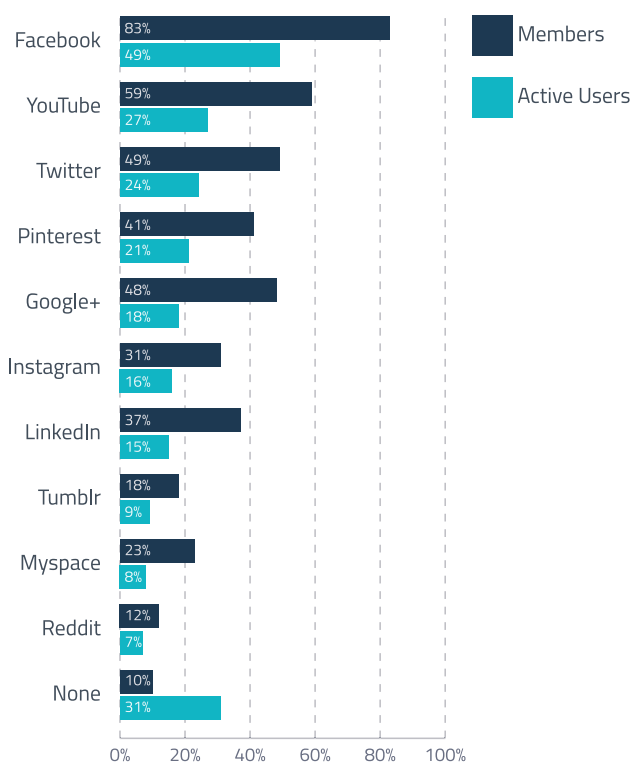


FACEBOOK STILL THE BIGGEST SOCIAL NETWORK

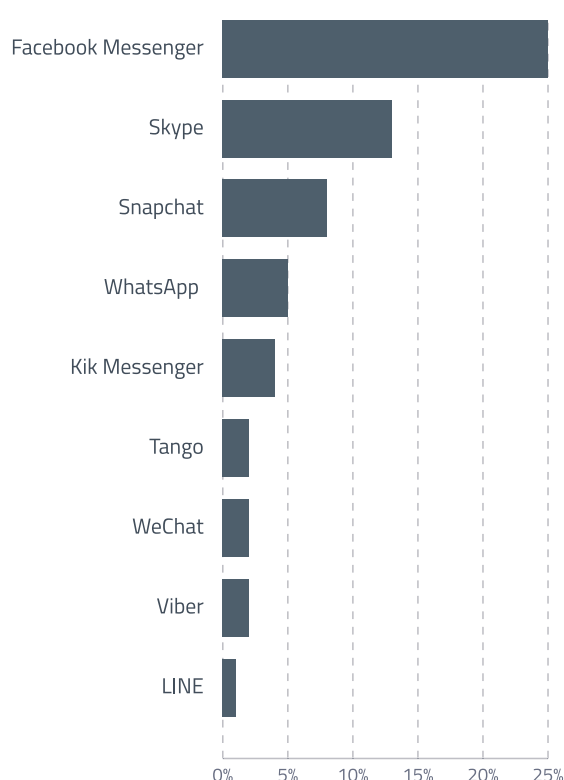
Within the social networking world, **Facebook remains by far the most dominant platform: 83% of NFL fans have an account, while close to half (49%) describe themselves as active users.** That gives Facebook an active user base which is nearly twice that of the next biggest platform.

Chart 13: Top Social Networks and Messaging Services

% NFL fans who are members/active users on...



% NFL fans who use the following messaging services



Question: Account: On which of the following services do you have an account? // Active users: Which of the following services have you used or contributed to in the past month using any type of device? / Messaging Services: Which of the following mobile / tablet applications have you used in the past month? (on any device) // **Source:** GlobalWebIndex Q4 2014 // **Base:** Internet Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on [Social Media > Social Platforms > Account Ownership / Active User OR Apps > Specific Applications > Specific Applications Used](#)

It is YouTube and Twitter which compete for second position – both being actively used by around a quarter of NFL fans – followed by a third-tier of networks comprising Pinterest, Google+ and Instagram. In terms of messaging apps, meanwhile, it's **Facebook Messenger which tops the list** – being the major beneficiary among those who are chatting to friends as they second-screen.

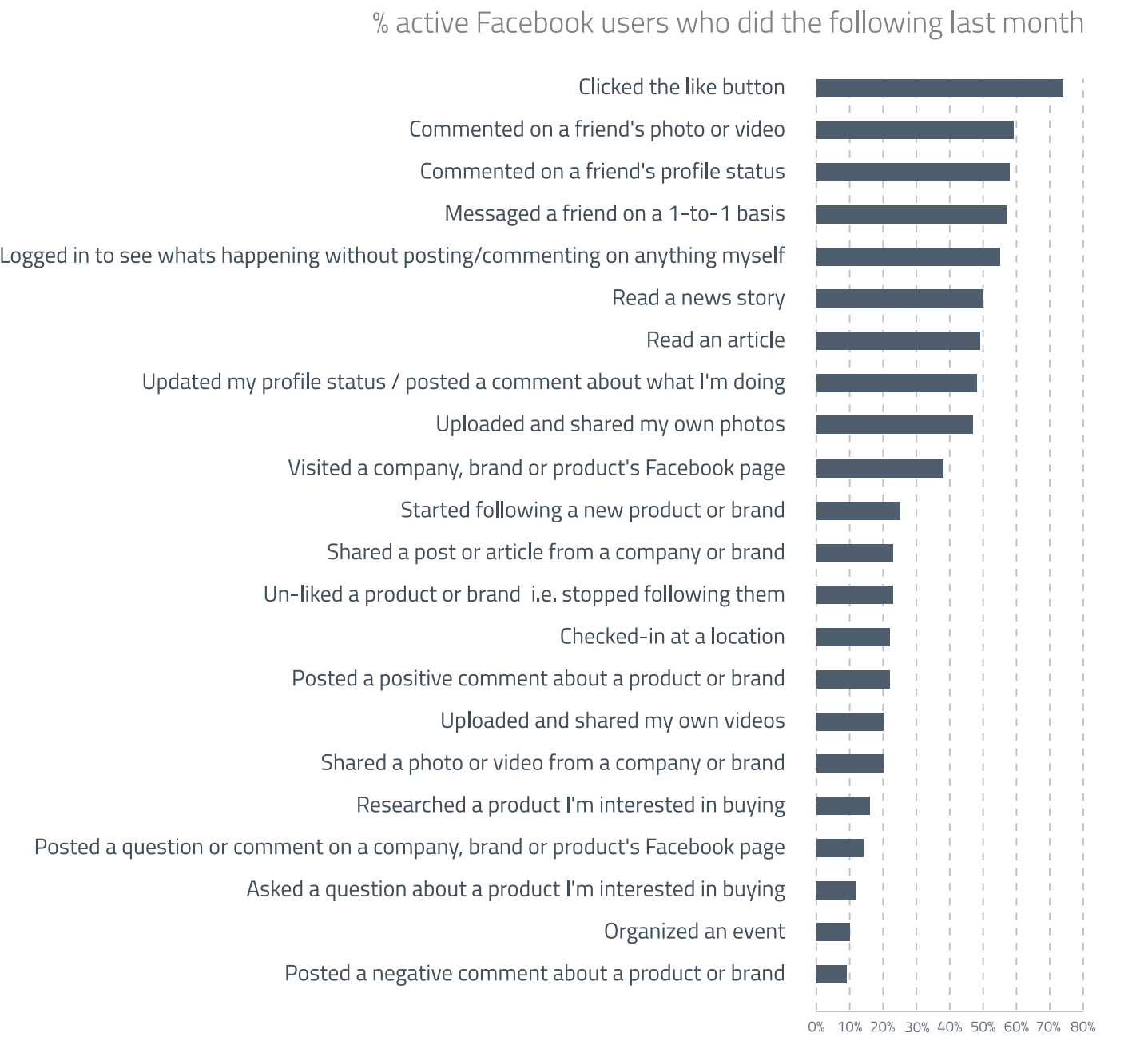
Arguably the most significant data point in our chart is **that just 10% of NFL fans do not have an account on any social network.** Similarly, just 3 in 10 are *not* actively using at least one network, underlining the huge importance of all things social to this audience (and to Americans more generally).

75% OF NFL FANS ON FACEBOOK ARE "LIKERS"

Among the NFL fans who are actively using Facebook, an impressive three quarters say that they clicked the "like" button last month.

What's more, over a fifth say that they posted something positive about a brand and a quarter started following a new product or brand. Clearly, then, the importance of Facebook as a brand interaction space remains considerable. This is particularly true when we recognize that over 20% of NFL fans (and 40% of online views) say that they "follow" sports stars via social media.

Chart 14: Facebook Behaviors among NFL Fans



Question: Thinking about when you use Facebook, can you please tell us if you have done any of the following within the last month? // Source: GlobalWebIndex Q4 2014 // Base: Active Facebook Users in the USA aged 16-64

Want to explore this data on the PRO Platform? Click on **Social Media > Social Platform Past Month Activities > Facebook Actions**



Jason Mander
Head of Trends

E jason@globalwebindex.net /// T +44 20 7731 1614
A Bedford House, 69-79 Fulham High Street, London, SW6 3JW, England

www.globalwebindex.net