

YouGov

UNITED STATES



# Next fan up

Inside the next-generation of NFL fans

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# Next fan up

As the 2023 NFL season kicks off, longtime fans of the league will return to their favorite Sunday routines. While fans want to see their team win the Super Bowl in February, the league itself wants to grow its fanbase by ensuring the next generation embraces the sport.

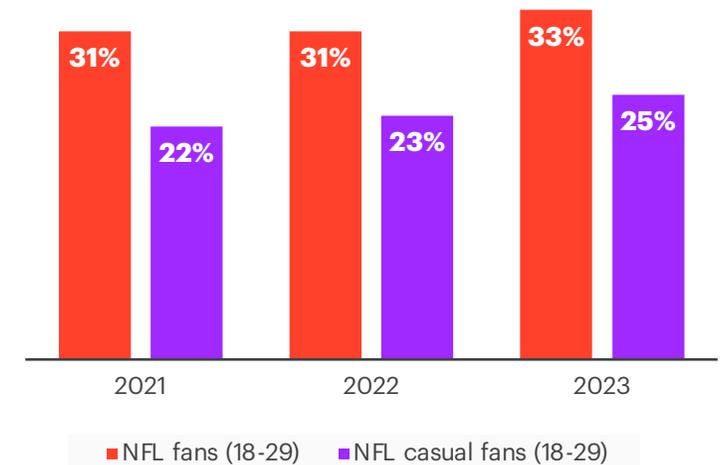
The good news for the NFL is that more Americans aged 18-29 are interested in the league in 2023 than were in 2021. What's driving this increased interest, and how do these younger, newer fans (next-gen fans) of the sport compare to mature NFL fans aged 30+?

This report explores the next gen of NFL fans, uncovering their favorite teams and players, their media consumption preferences, adoption of sports betting and other key trends.

YouGov Profiles, August 20, 2023; August 21, 2022; August 22, 2021  
(N= 9800-12000)

- NFL fans (18-29)- NFL is TOP interest or "somewhat interested"
- NFL casual fans (18-29) - "A little bit interested in NFL"

NFL fan interest (18-29)

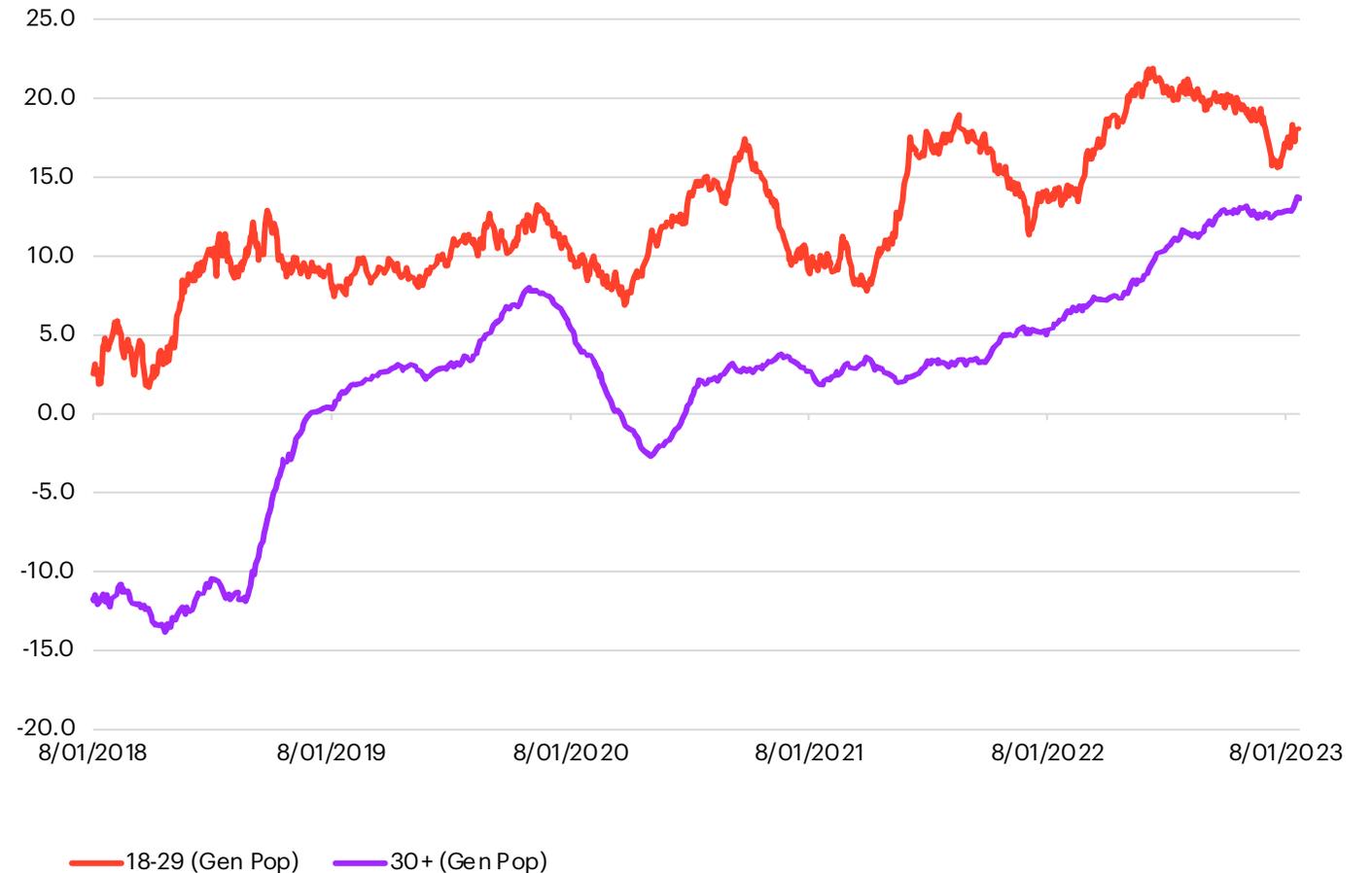


# Under 30s' high opinion of NFL continues to grow

Reputation among over 30s recovers from politicization and pandemic

[How YouGov defines reputation >](#)

## Reputation of NFL

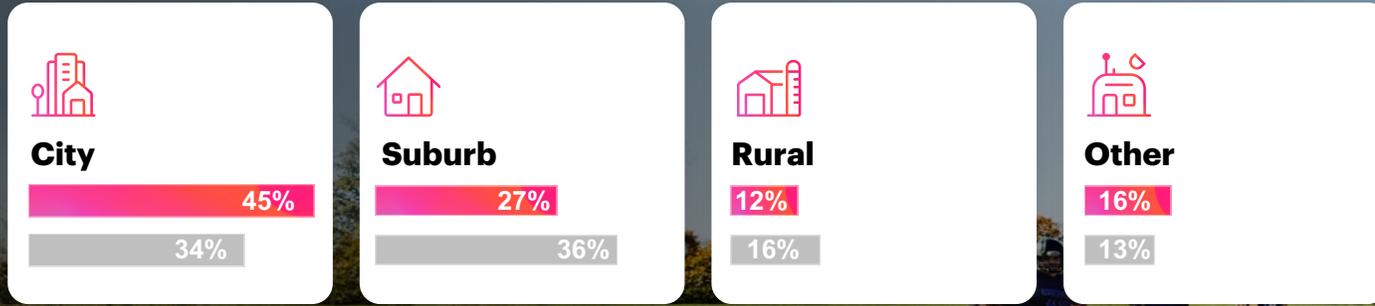


YouGov BrandIndex: August 1, 2018 – August 23, 2023

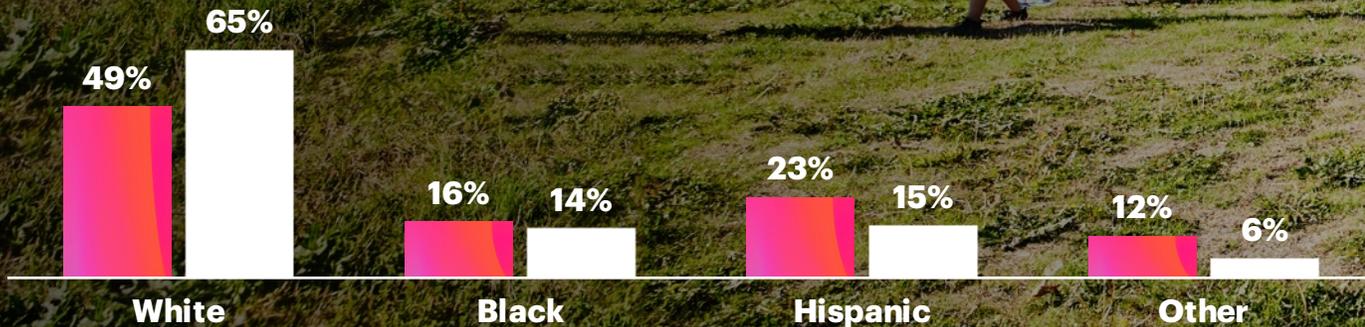
- 18-29 (Gen Pop), N>600
- 30+ (Gen Pop), N>3200

# Next-gen fans are diverse city dwellers

**Location** ■ NFL fans 18-29 ■ NFL fans 30+



**Race** ■ NFL fans 18-29 ■ NFL fans 30+



YouGov Profiles, August 2023

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- NFL fans (30+) – “NFL is TOP interest or “somewhat interested”

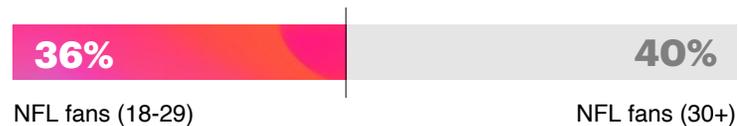


# Friend groups driving younger interest more than family

“I started watching/going to games with my friends”

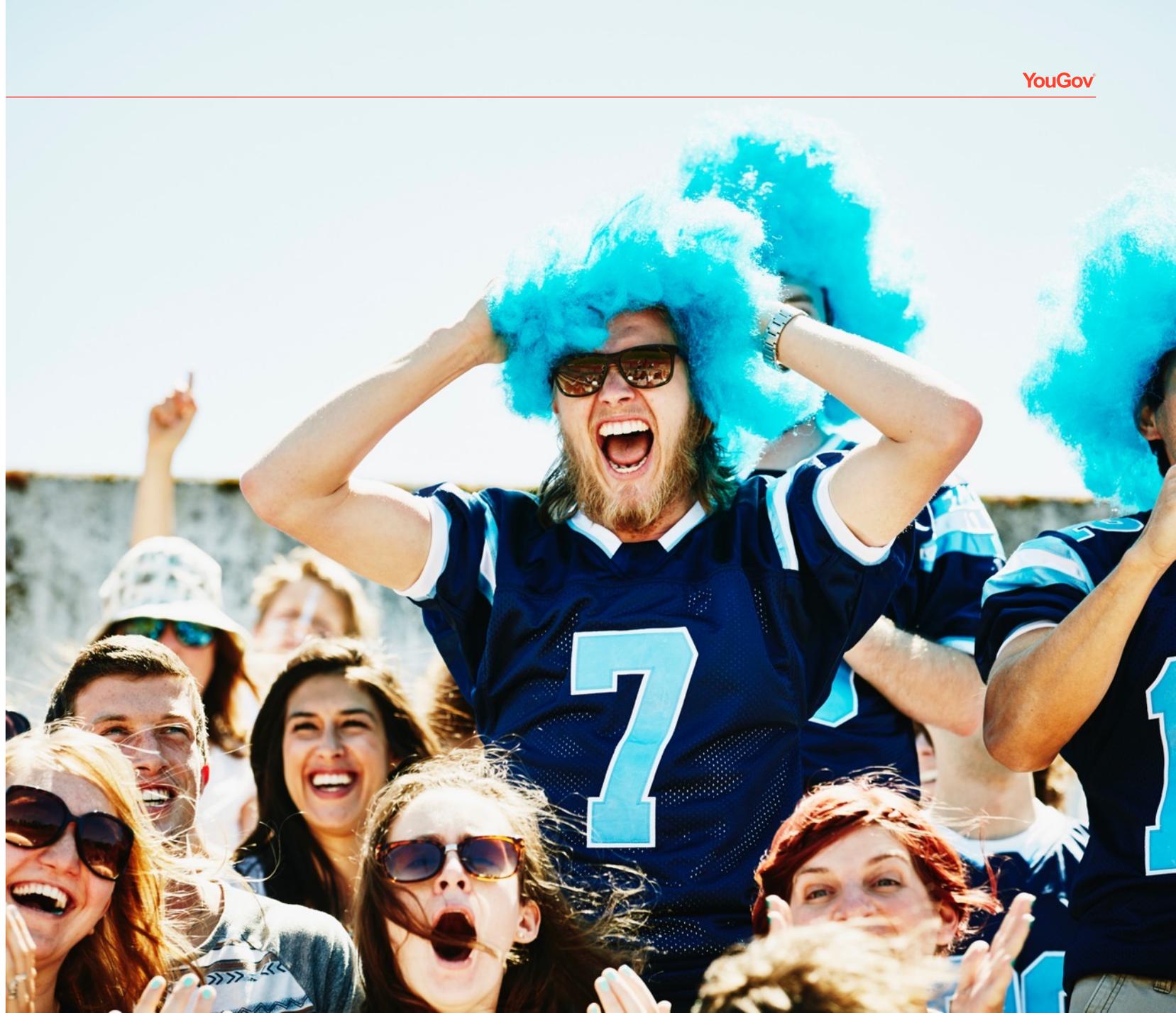


“My family are longtime fans, and I was raised to be a fan too”



YouGov Surveys, August 23-25, 2023

- NFL fans (18-29) – NFL is TOP interest or “somewhat interested” (N>125)
- NFL fans (30+) – “NFL is TOP interest or “somewhat interested” (N>750)



# Next-gen fans top two teams have not won Super Bowl in last decade

7 games among next-gen top 5 teams in 2023 season (including three in the first four weeks)

## NFL fans 18-29



## NFL fans 30+



■ Indicates biggest difference between age groups

YouGov Profiles, August 2023

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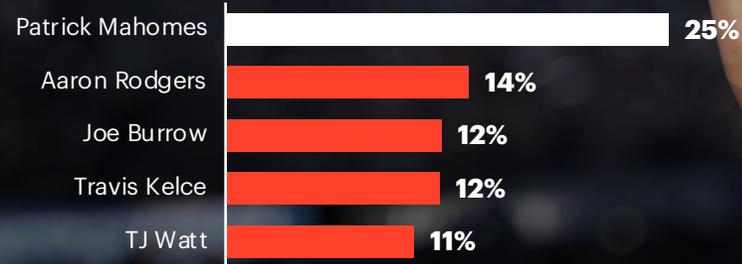
# Patrick Mahomes most popular player, especially with fans aged 30+

Next-gen fans more likely to name wide receivers like OBJ, DK Metcalf and Ja'Marr Chase as favorites

## NFL fans 18-29



## NFL fans 30+

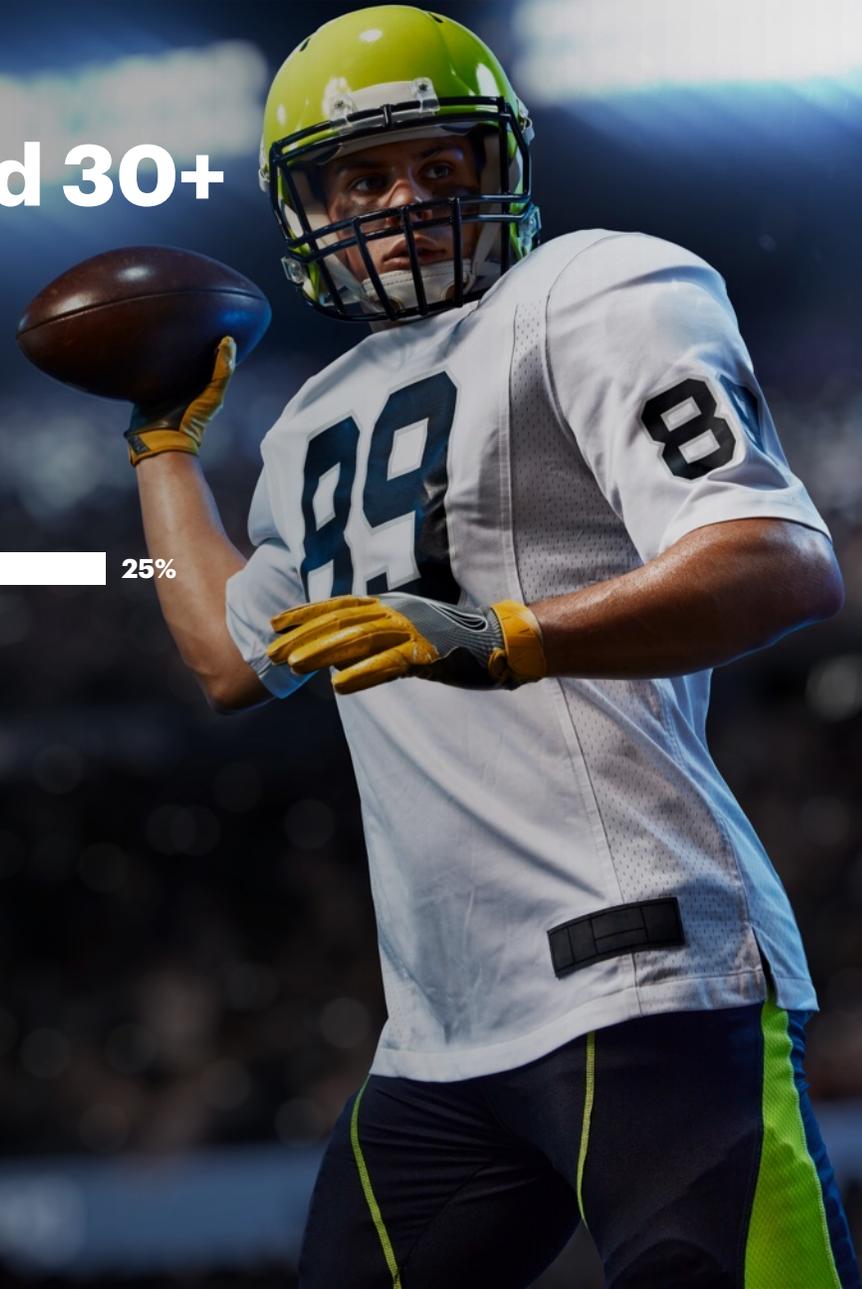


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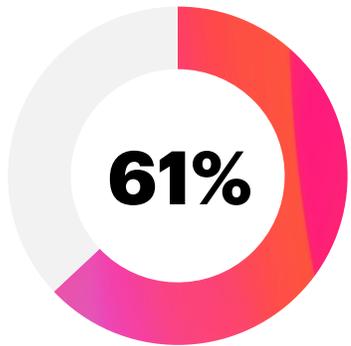
[Learn more >](#)

YouGov Profiles, August 2023

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# Sunday Ticket on YouTube TV better for next-gen fans

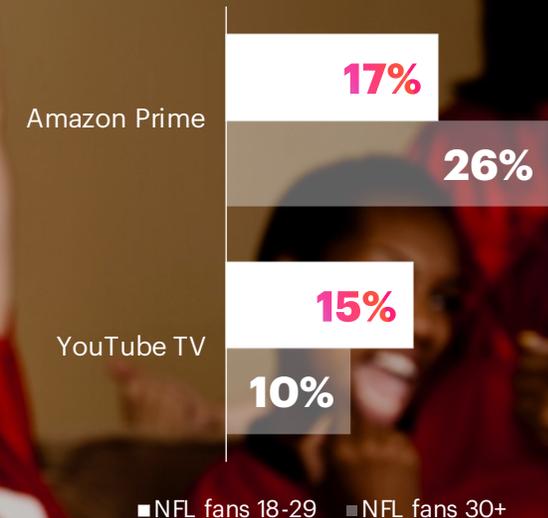


of NFL fans 18-29 agree “Watching sports via streaming is so much better than watching on live TV” (vs 33% NFL fans 30+)

YouGov Profiles, August 2023

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Which, if any, of the following streaming services or platforms have you used to watch sport in the past 30 days?



52-week moving average

[Learn more >](#)

# Next-gen NFL fans prefer RedZone

Fans over 30 gravitate toward full, primetime games

**If your favorite team was not playing, how would you most prefer to watch live NFL games from home on Sundays?**



■ NFL fans 18-29 ■ NFL fans 30+

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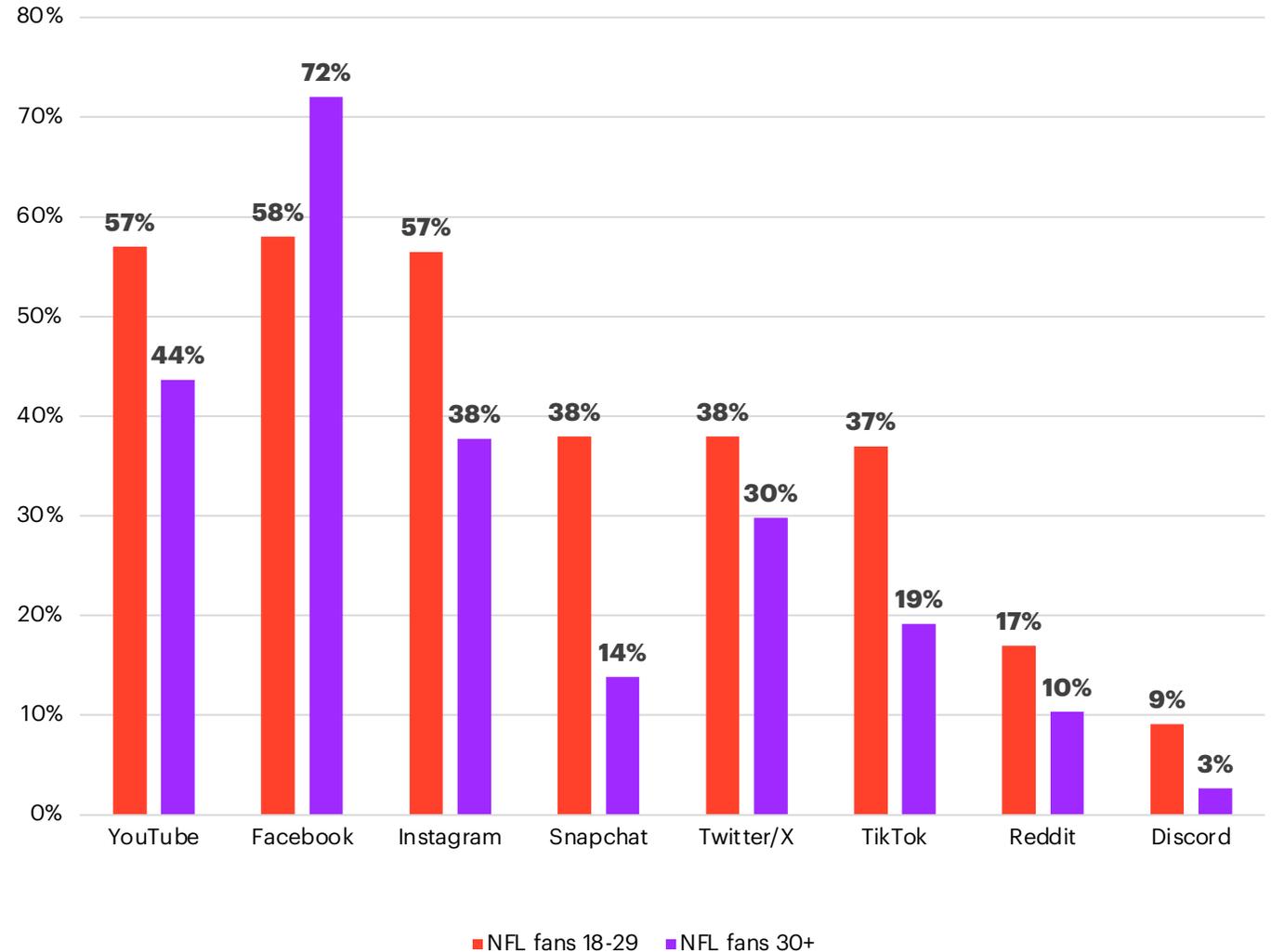
# Next-gen NFL fans huddling on social

Snapchat, TikTok and Discord most overindexed

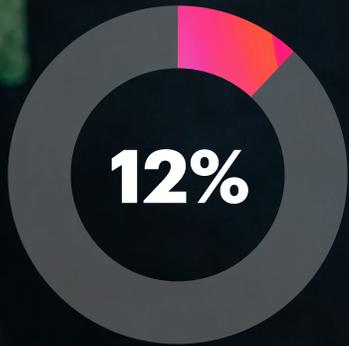
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YouGov Profiles, August 2023

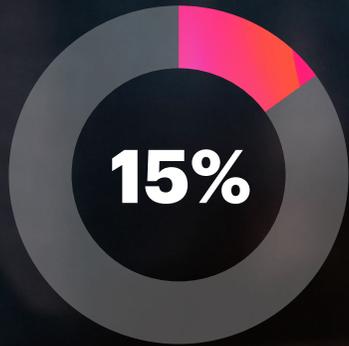
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# Next-gen NFL fans more involved with NFL lifestyle content

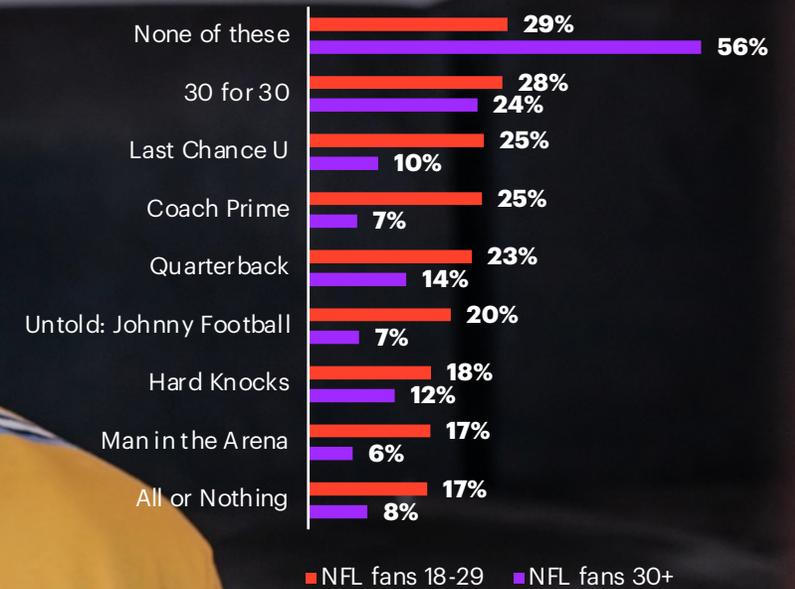


**Played Madden NFL recently**  
(vs. 7% NFL fans 30+)



**Played Madden NFL ever**  
(vs. 19% NFL fans 30+)

## Program ever watched



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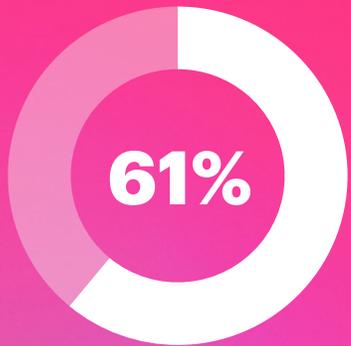
[Discover zero-party data >](#)

YouGov Profiles, August 2023

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# Better bettors?

Next-gen NFL fans 3x more likely to bet every week

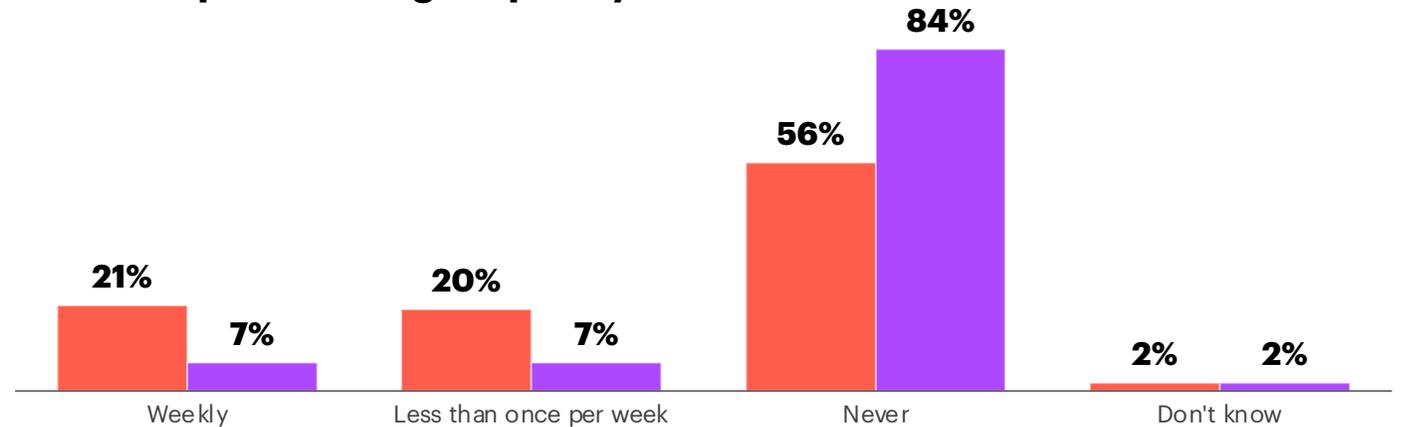


61% of NFL fans 18-29 think online gambling should be legal  
(vs 52% NFL fans 30+)

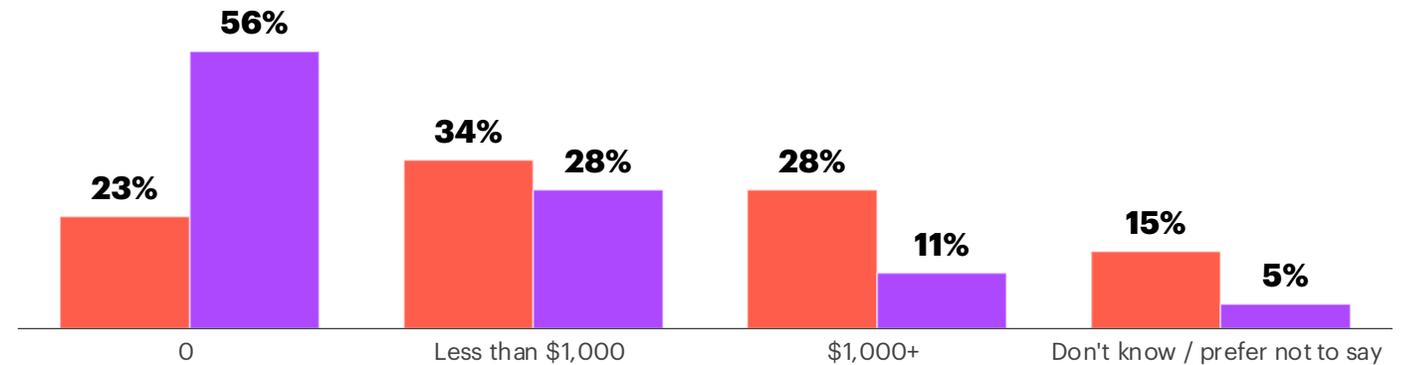
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## Online sports betting frequency



## Amount bet on sports annually



■ NFL fans 21-29 ■ NFL fans 30+

# Top online sportsbooks considered

- First-movers DraftKings and FanDuel have largest market-share
- ESPN's entrance likely to impact 2024 rankings

[Explore more rankings >](#)

YouGov BrandIndex: August 1, 2022 – July 31, 2023

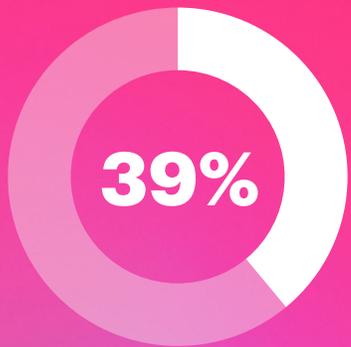
- NFL fans (21-29) – NFL is TOP interest or "somewhat interested" (N>350)

## Consideration Rankings

Rank	Brand	NFL Fans 21-29
1	<b>DraftKings</b>	21%
2	<b>FanDuel</b>	20%
3	<b>Bet365</b>	12%
4	<b>BetMGM</b>	12%
5	<b>FOX Bet</b>	11%
6	<b>888sport</b>	11%
7	<b>Betway</b>	9%
8	<b>WynnBET</b>	6%
9	<b>Barstool Sportsbook</b>	5%
10	<b>Bally Bet</b>	4%

# May the best fan win

Majority of next-gen fans play fantasy football

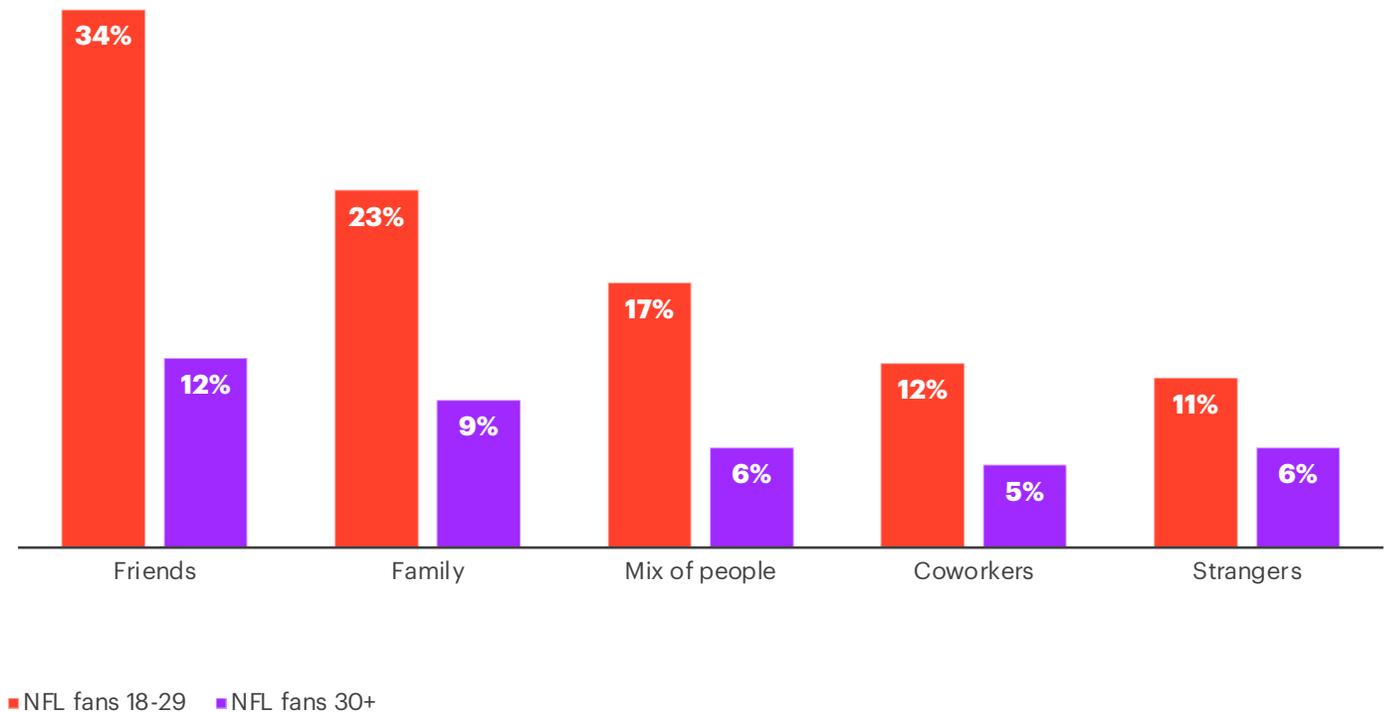


of NFL fans aged 18-29 did not belong to any fantasy football league in 2022  
(vs 74% of NFL fans 30+)

YouGov Surveys, August 23-25, 2023

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- NFL fans (30+) – “NFL is TOP interest or “somewhat interested” (N>750)

**Last year (i.e., in 2022), did you belong to a fantasy football league predominantly comprised of any of the following people? Please select all that apply.**



# Want a deeper analysis?

## YouGov BrandIndex tracks 16 key brand health metrics including:

- Ad Awareness
- Customer Satisfaction
- Purchase Consideration
- Recommendation

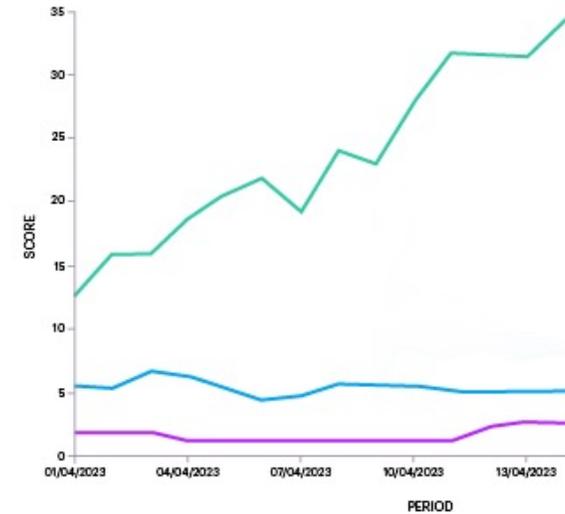
## With YouGov Profiles, you can segment your analysis by:

- Team or player interest
- Media consumption habits
- Gambling interest
- And much more

Get in touch >

View 2023 Super Bowl Report >

## Advertising awareness



Metrics ▾

Advertising Awareness



# Thank you

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