

An aerial photograph of a red running track with several runners in various stages of a race. The runners are casting long, dark shadows on the track surface. The track has white lane markings and arrows pointing in the direction of the race. The YouGov logo is centered at the top of the image.

YouGov®

SPORTS WHITE PAPER

# Global Sports 2022: Uncovering the Socially Responsible Sports Fan

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Summary



# ▶ Introduction

Social justice, gender equality, the environment; in recent years global movements such as Black Lives Matter, Me Too, and Extinction Rebellion have been shining a light on these issues and encouraged campaigning for change. In this new report, YouGov Sport sets out to understand the impact of social and environmental priorities within sports and explores how sports fans respond to these topics.

With over three quarters of adults around the globe following at least one sport, gathering for a sporting event is, for many, a chance to feel part of a community and to come together around a shared interest. In such emotionally charged moments, the brands that sponsor or are involved in sport have an opportunity to create positive associations in the mind of the consumer by tailoring their communications to this highly engaged audience.

This study measures sports fans' attitudes around the issues of social responsibility and equality, delving deep into their expectations of sports rights holders and their sponsors to get involved in these matters, and ultimately champion change. As those conversations enter our homes, workplaces and schools, marketers have been discussing and studying the need to bring brand purpose and corporate social responsibility into their marketing mix. With activism on the rise, and awareness around these issues constantly growing, younger generations in particular are expressing a preference for brands that deliver on those purpose statements.

This report uses global research across a selection of international markets in tandem with syndicated data from YouGov Profiles, YouGov Global Profiles, YouGov Global Fan Profiles, YouGov Direct and YouGov BrandIndex.

*Please note, our samples in East Asian markets such as China, Hong Kong, Singapore and India are not all nationally representative (with some being representative of the online or urban population; see methodology for details).*





Section 1

# Understanding the size and drive of sports fans

In this first section, we look at the global reach of sports and identify the size of the sports fan base. We also explore the role that sports play in their lives and identify the issues that matter the most to them.

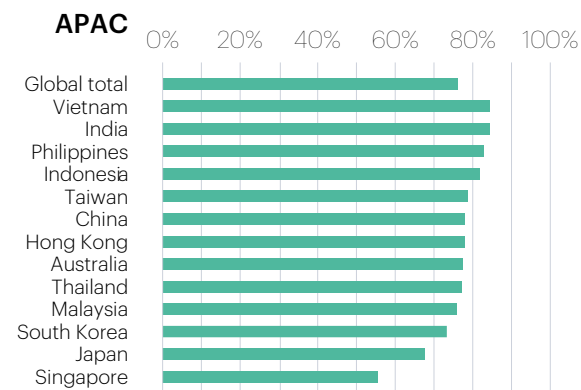
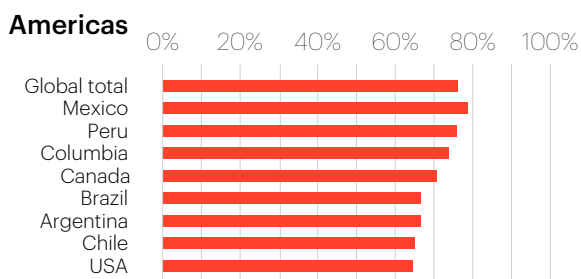
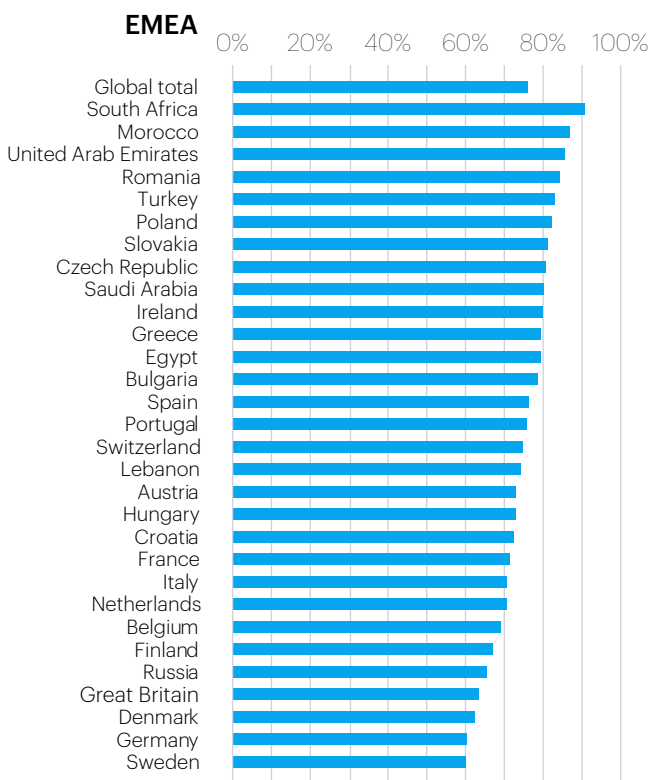


## Global following of sports is high

YouGov Global Fan Profiles reveals that over three quarters of adults around the world follow sports (**76%**). Looking at regional fan base sizes across the 51 international markets

surveyed, these range from **60%** to over nine in ten (**91%**), with most markets globally at or over the **75%** mark for levels of sports fans.

## Sports fans by country within region



Q: Which, if any, of the following sports do you watch/follow?

For the purposes of the remainder of the report, we will focus on a selection of the global markets as a representation of the broad regions and markets covered by YouGov's international data products.





# The popularity of sports spans all ages

Whilst men are more likely to watch or follow almost all types of sports than women, the differences by age are less pronounced, with strong sports following across all age groups.

Sports followers by age and gender (Global)							
Global Total	Age					Gender	
	18-24	25-34	35-44	45-54	55+	Male	Female
76%	77%	76%	77%	76%	74%	83%	69%

Q: Which, if any, of the following sports do you watch/follow?

## Football ranks highly across most regions

Sports often play a huge part in national pride for a country, be it supporting their national team or a local athlete, but which sports are the most popular within different territories? Data from YouGov Global Fan Profiles looks at the top three sports watched or followed by sports fans in select countries. Football is the most popular sport globally, followed by basketball and swimming. Its stronghold in popularity is

evident in 9 out of 16 countries analyzed. American football and Australian rules football appear in pole position in the US and Australia respectively, with ice hockey ranking highest in Canada. In India, cricket dominates the agenda among sports fans, whilst in China basketball is the number one sport.

### Sports followed/watched by country (Top 3)

	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>
Argentina	Football	Tennis	Basketball
Australia	Australian Rules Football	Tennis	Cricket
Canada	Ice Hockey	Baseball	American Football
China	Basketball	Table Tennis	Badminton
France	Football	Tennis	Rugby Union
Germany	Football	Ski Jumping	Biathlon
Hong Kong	Football	Badminton	Swimming
India	Cricket	Kabadi	Badminton
Indonesia	Badminton	Football	Motorsport
Italy	Football	Tennis	Motorsport
Poland	Ski Jumping	Volleyball	Football
Singapore	Football	Swimming	Badminton
Spain	Football	Tennis	Basketball
GB	Football	Tennis	Rugby Union
UAE	Football	Basketball	Cricket
USA	American Football	Baseball	Basketball

Q: Which, if any, of the following sports do you watch/follow?

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# The Olympics are the most popular global event

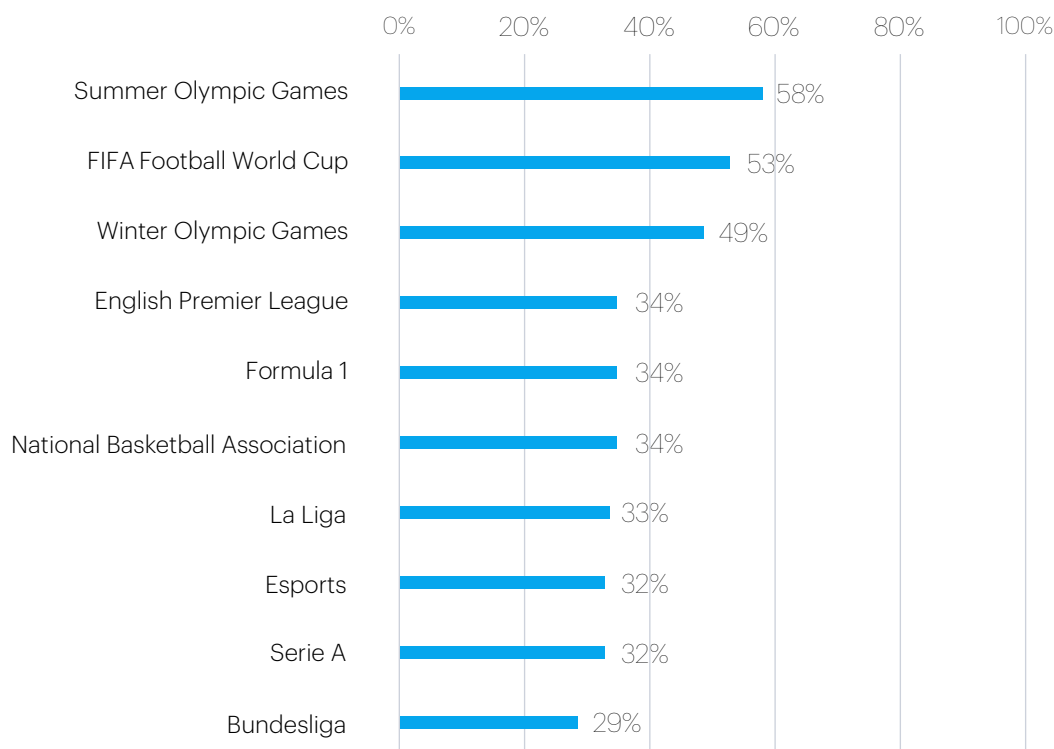
Each year, hundreds of major sporting events are held around the world, with billions of sports fans tuning in to view. Reviewing the top 10 sporting events from YouGov Global Fan Profiles, it is not surprising to find that sports fans register higher levels of interest when compared to the global population. Quadrennial events take centre stage, with the Summer Olympics in pole position among sports fans (**58%**), and the Winter Olympics in third (**49%**).



The worldwide love of football puts the FIFA World Cup as the second most popular global sporting event of interest (**53%**), and football leagues dominate five out of the 10 big events. The non-soccer events of Formula 1 and NBA Basketball are favored by **34%** of global adults and rank on par with the English Premier League, closely followed by

esports (professional video game competitions) at **32%**. Looking at the data by age, the Summer Olympics, FIFA World Cup and the Winter Olympics rank first, second and third for all groups, except for sports fans aged 18-24, where esports moves up the rankings into second position.

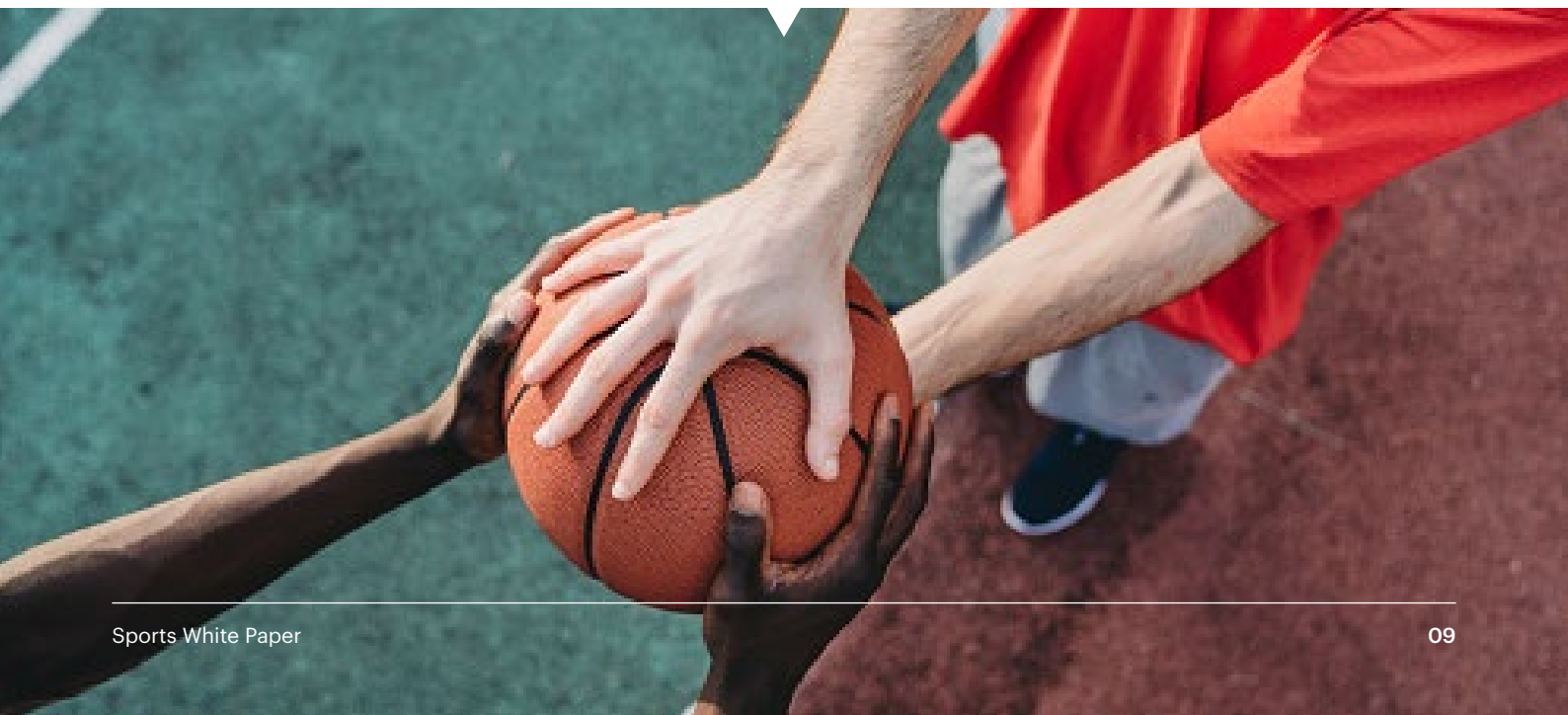
## Interest in global sports leagues and events



● Global sports fans

Q: What is your level of interest in the following global leagues? Interested/somewhat interested

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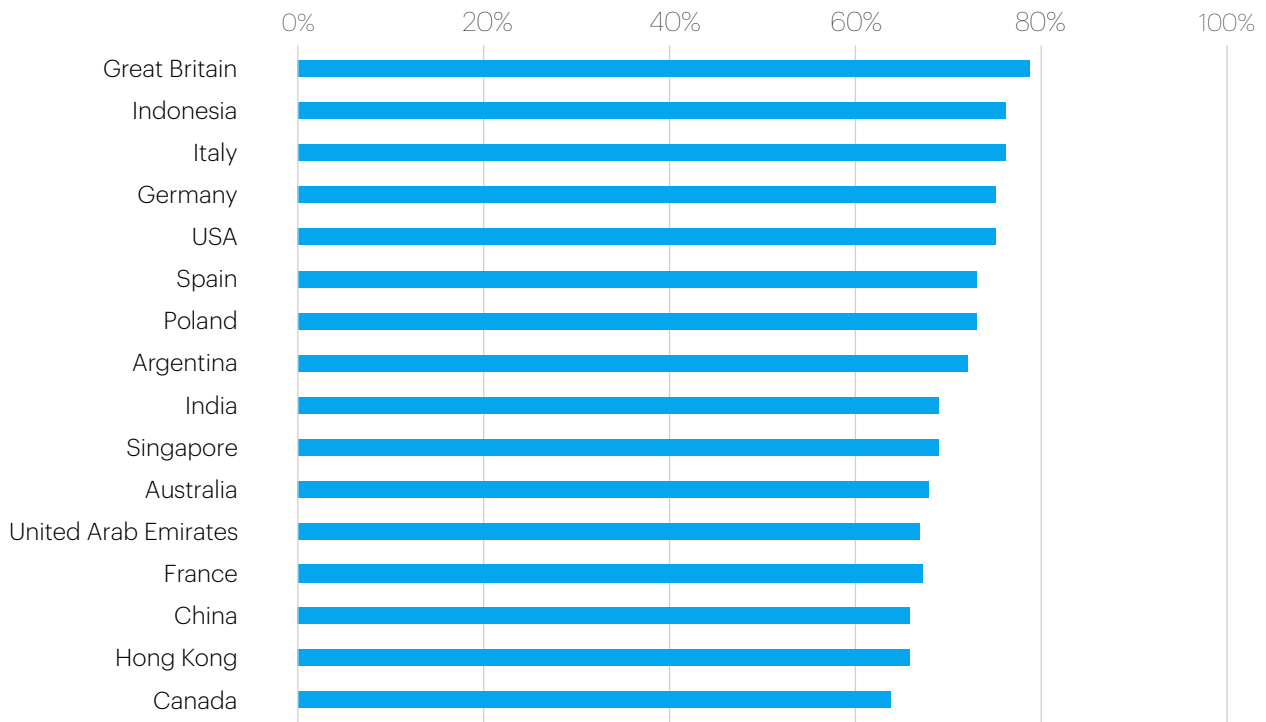


## Global sporting events bind together international communities

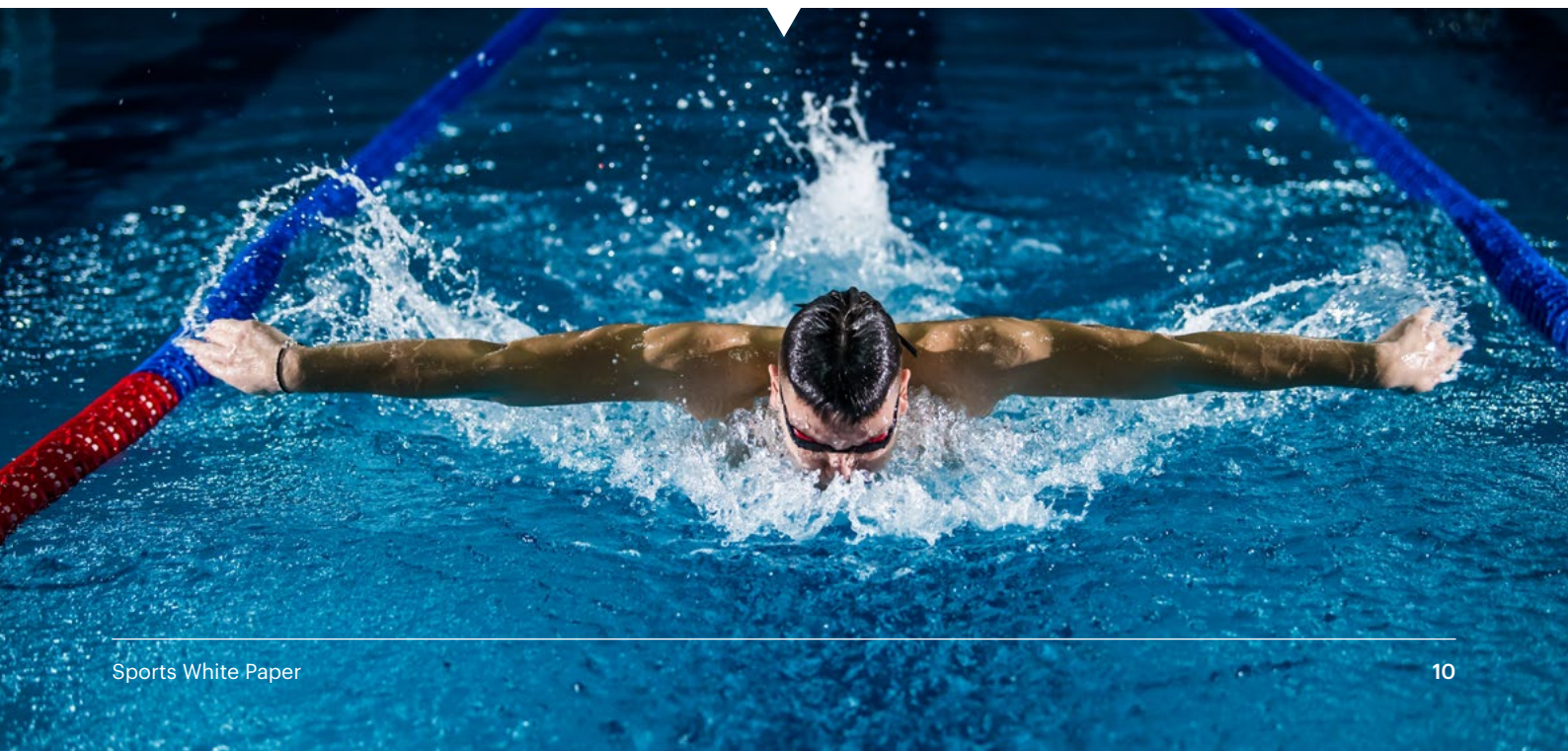
YouGov Global Profiles data shows that the power of global sporting events to enhance international communities is far reaching, with more than two thirds of sports fans globally agreeing that events like the Olympics are good for the international community (**67%**). For Brits, the Olympic flame burns brightly, with almost eight in ten (**79%**) recognizing

the value of the Olympics for the international community, compared to almost three quarters of US sports fans, along with Indonesia, Italy, Germany, Spain, Poland, and Argentina, all registering **70%** or above.

### Sports followers: 'I think having an event like the Olympics is good for the international community' - Net agreement by country



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.



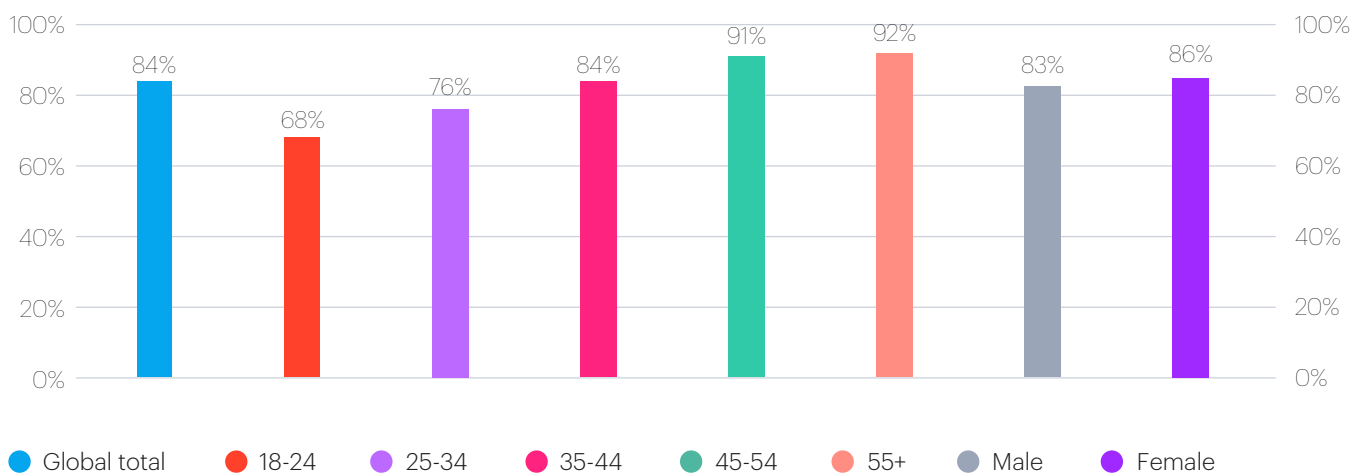


# Americans form a deep bond with their sports teams

This sense of community is also evident when we look at US sports fans and identify the deep connection they have with their favorite team. Committed to the end, YouGov US

General Sports tracker data shows that over eight in ten US sports enthusiasts remain loyal to their team (84%), rising to over nine in ten among US sports fans aged 45+.

## Sports fans: 'Whether my team wins or loses, I will stay forever loyal in support of the team' – Net agreement (US)



Q: Thinking about your favorite team, to what extent do you agree or disagree with the following statements? YouGov US Sports General Tracker.

Sports instill a compelling sense of loyalty and passion among fans, but what else matters to them? And specifically, what global social issues are they concerned about?

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# What matters to sports fans?

The world has faced many challenges in recent years. The pandemic spared no country, and created not only a global health crisis, but also a global economic downturn. However, as the pandemic gradually eases in many countries, it is still difficult to predict the path ahead. Alongside the challenges that directly impact the everyday lives of many global consumers, awareness of broader issues like climate change and the importance of sustainability, social justice, and social responsibility is rising among global consumers and sports fans alike.

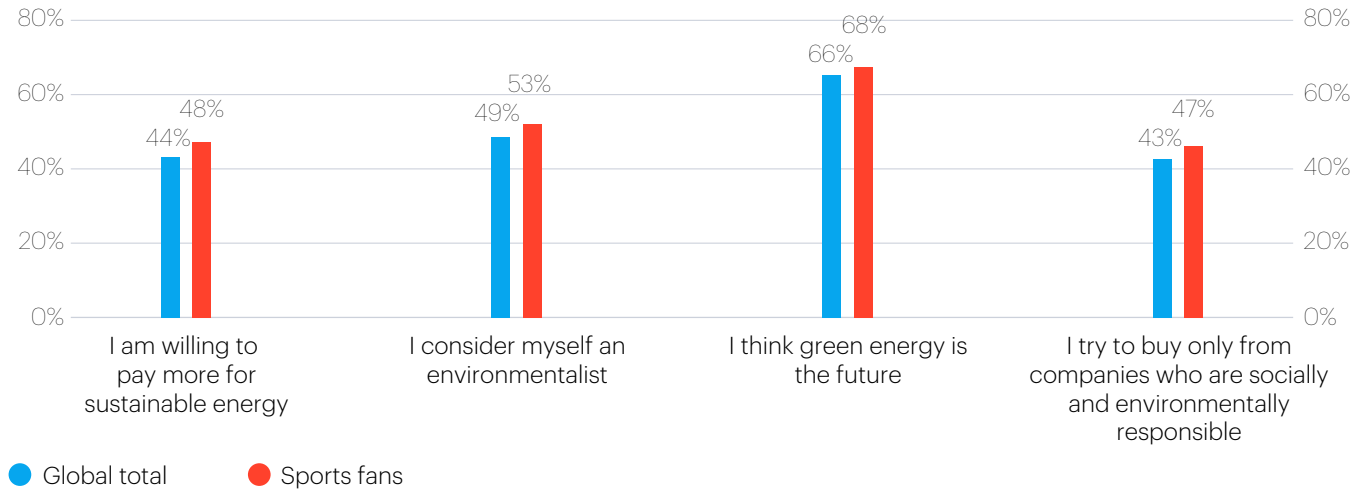


## Sports fans are focused on the environment and sustainability

YouGov Global Profiles data shows that over half (**53%**) of global sports fans agree that 'I consider myself an environmentalist'. In addition, **68%** of fans agree that 'I think green energy is the future', and almost half (**48%**) agree that they would be 'willing to pay more for sustainable energy'.

Sports fans are more likely to agree with these statements compared to the global total population as a whole, and also over index on their commitment to only buy from companies with a social conscience.

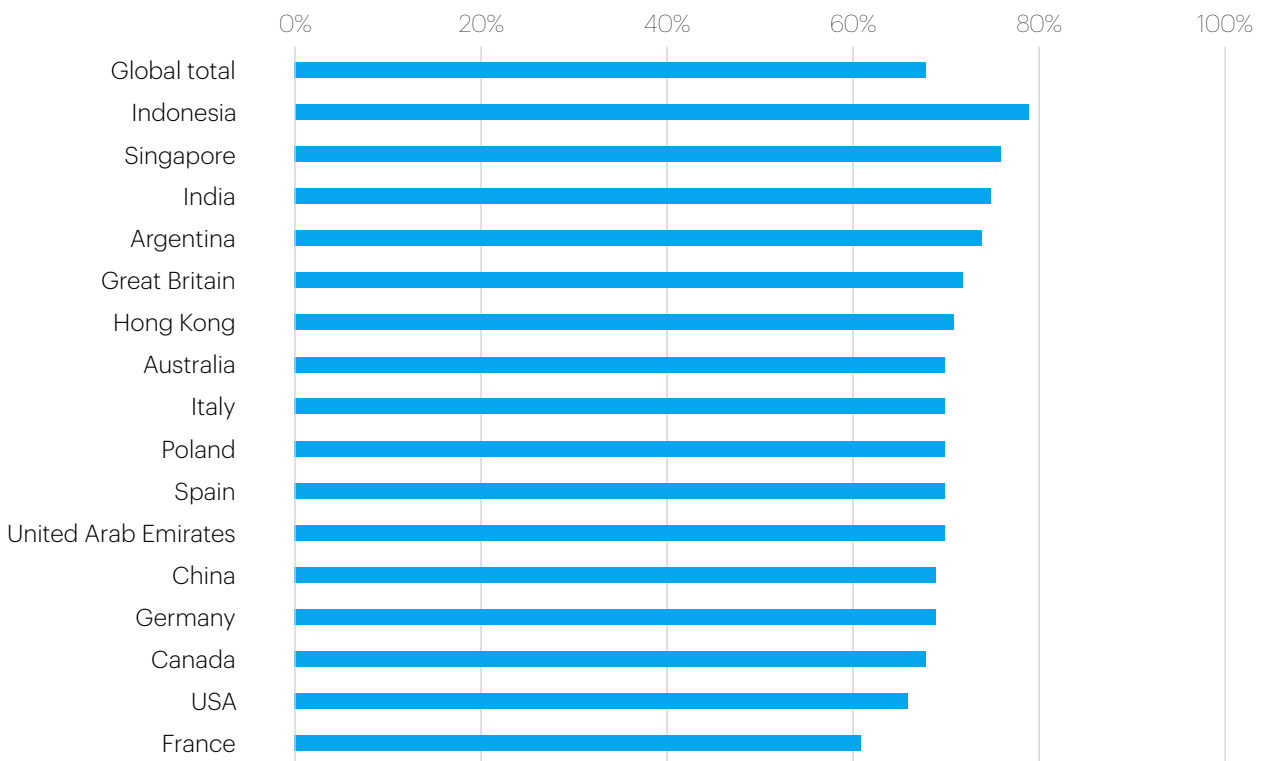
### Agreement with environmental statements – Net agreement (Global)



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

Looking at how attitudes toward green energy compares among sports fans across a selection of countries, in most markets around seven in ten agree with the statement 'I think green energy is the future'.

### Sports fans: 'I think green energy is the future' – Net agreement by country



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

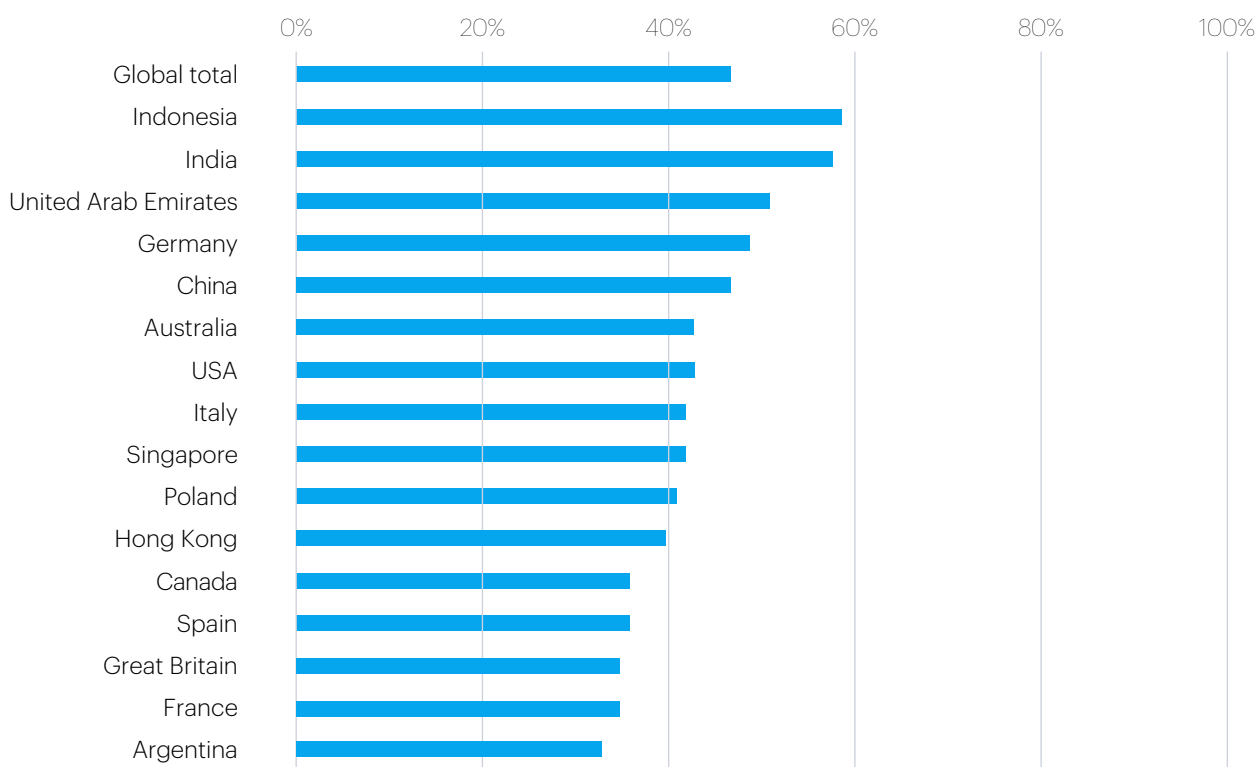


# Converting views into action

How do these attitudes toward the environment and sustainability influence buying behavior? Analyzing sports fans' commitment to purchasing from companies that are socially

and environmentally responsible, we see some interesting variations by country. Only a third agree in Argentina and European countries such as Great Britain, Spain and France.

## Sports fans: 'I try to buy only from companies who are socially and environmentally responsible' - Net agreement by country



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

With environmental and sustainability issues important to global sports fans, sports events and organizations will need to

think about their priorities in this area and foster initiatives that will deepen their connections with their fan base.



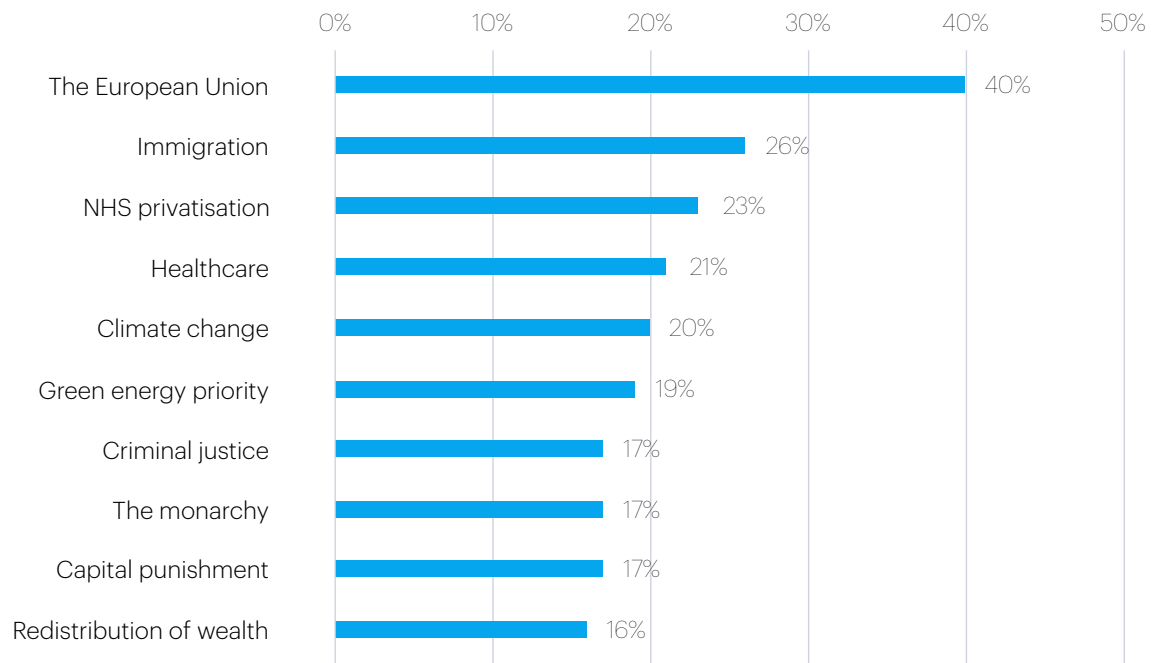


# Environmental issues are high on the agenda for British sports fans

Using YouGov UK Profiles data, we explored the top 10 issues (out of a list of 56 factors measured) considered most important to Great Britain sports fans. Primary issues include the European Union and immigration, followed by the NHS privatization and healthcare; however, climate change and green energy rank 5th and 6th, placing them in the top tier of issues considered important among British sports fans.



## Sports fans: Top 10 'most important' issues (UK)



● GB sports followers

Q: Which, if any, of the following issues are most important to you?

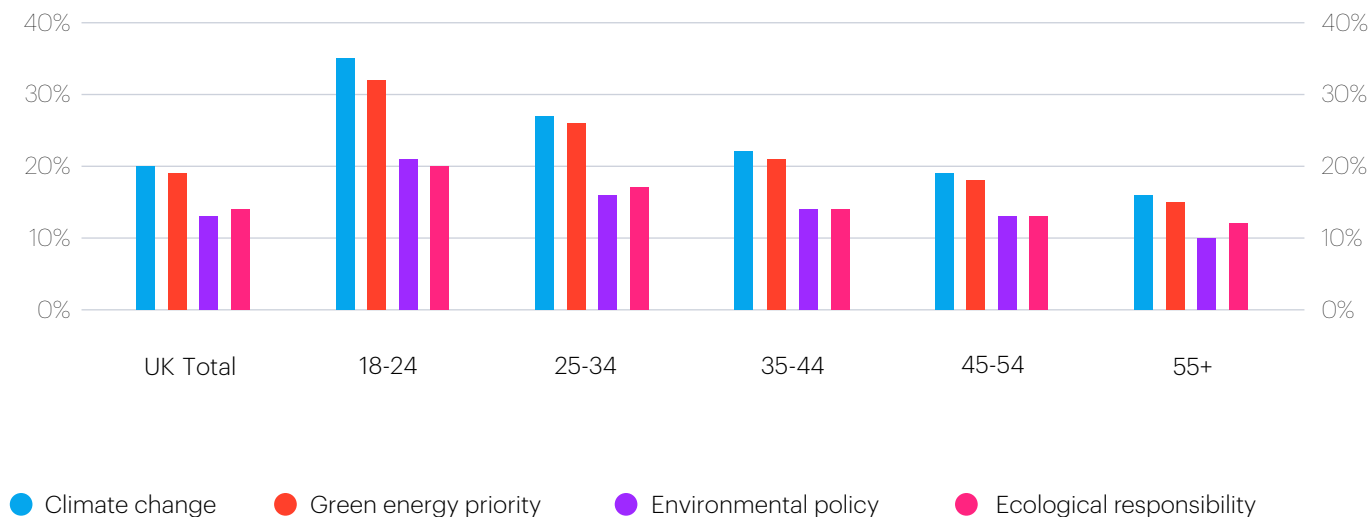
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Looking at GB sports fans who consider ecological or environmental issues to be their 'most important' concerns, we do see differences by age. Sports fans in the Gen Z cohort are significantly more likely to select climate change and

green energy as their primary concern than fans in any other age group – and 18–24-year-olds are twice as likely as British sports fans aged 55+ to consider these as top concerns.

### Sports fans: Environmental issues considered important by age (UK)



Q: Which, if any, of the following issues are most important to you?



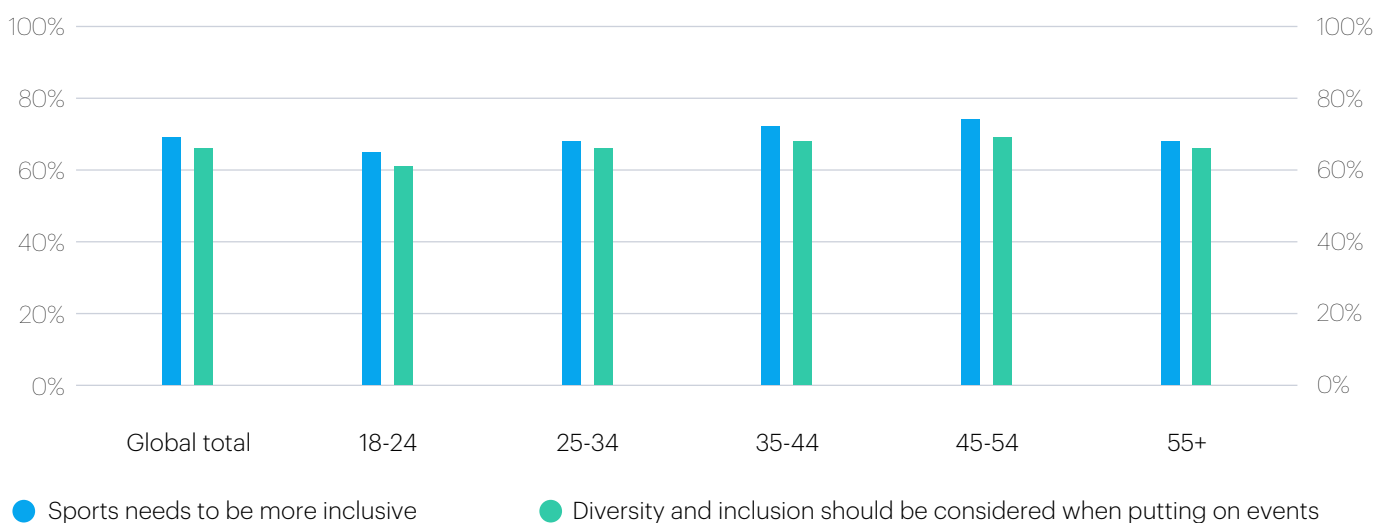


# Fans seek more inclusion in sports

Taking a deeper dive into YouGov's Global Profiles data, sports fans are also more likely than the average consumer to care about issues associated with diversity and inclusion. Since sports can bring people from different cultures and nationalities together, almost two thirds (65%) of sports fans agree diversity and inclusion should be considered when putting on events, and almost seven in ten global sports fans feel more could be done, with 68% agreeing that 'Sports need to be more inclusive', suggesting there is clearly room for improvement within the sector.

Interestingly, we see less variation by age around areas of diversity and inclusion compared to environmentally driven issues, with the over 55s equally supportive of the statement that diversity and inclusion should be considered when putting on events in general. However, a higher proportion of female sports fans than male agree there should be more consideration around diversity and inclusion when putting on events.

## Sports fans: Attitudes to diversity and inclusion by age and gender – Net agreement (Global)



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

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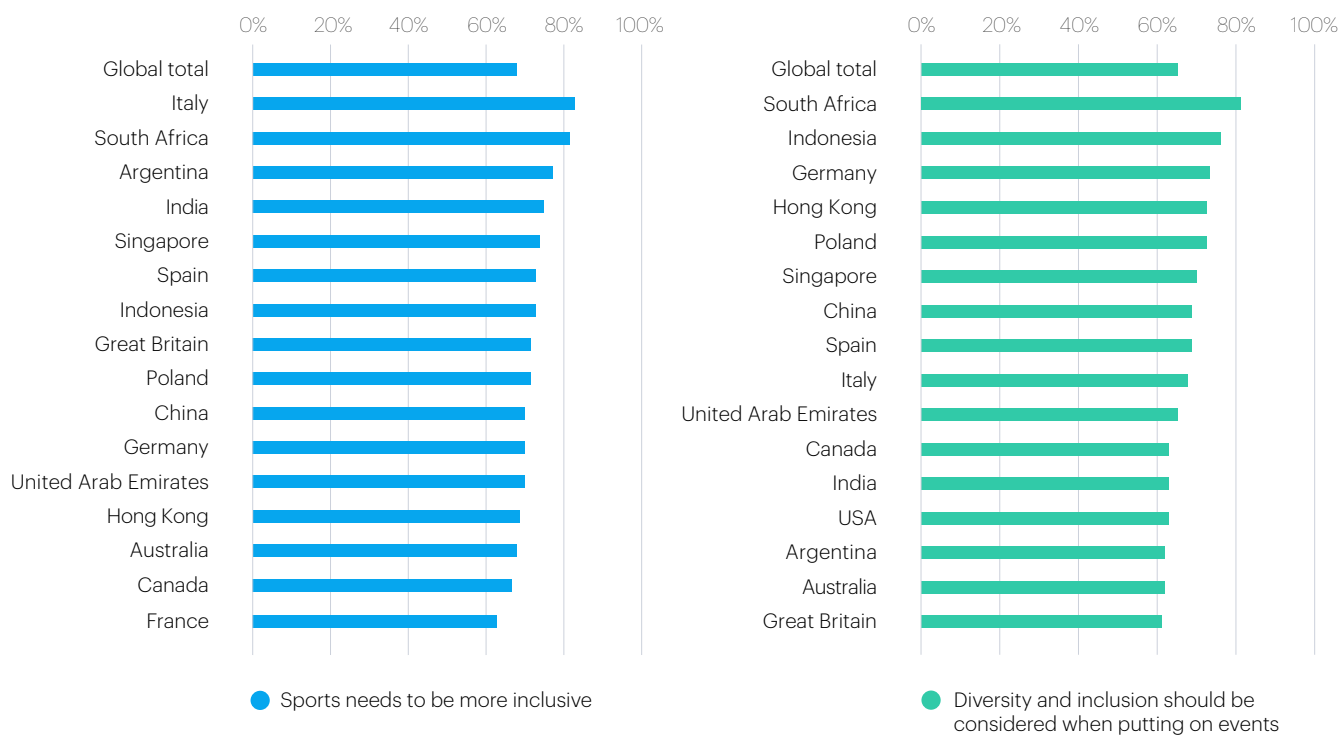


Diversity and inclusion are important issues for the majority of global sports fans, and the desire for sports to be more inclusive resonates most highly among Italian (**84%**) and Argentinian (**77%**) sports fans. Support for considering diversity and inclusion when putting on events is also not confined to a continent or region, with Indonesia and Germany the two countries with the highest level of

agreement with this statement among sports fans (**75%** and **74%** respectively).

The strength of support for diversity and inclusion is evident across the regions, with more than half of sports fans in all countries agreeing that sports needs to be more inclusive, and that diversity and inclusion should be considered when staging events.

### Sports fans: Attitudes to diversity and inclusion – Net agreement by country



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.







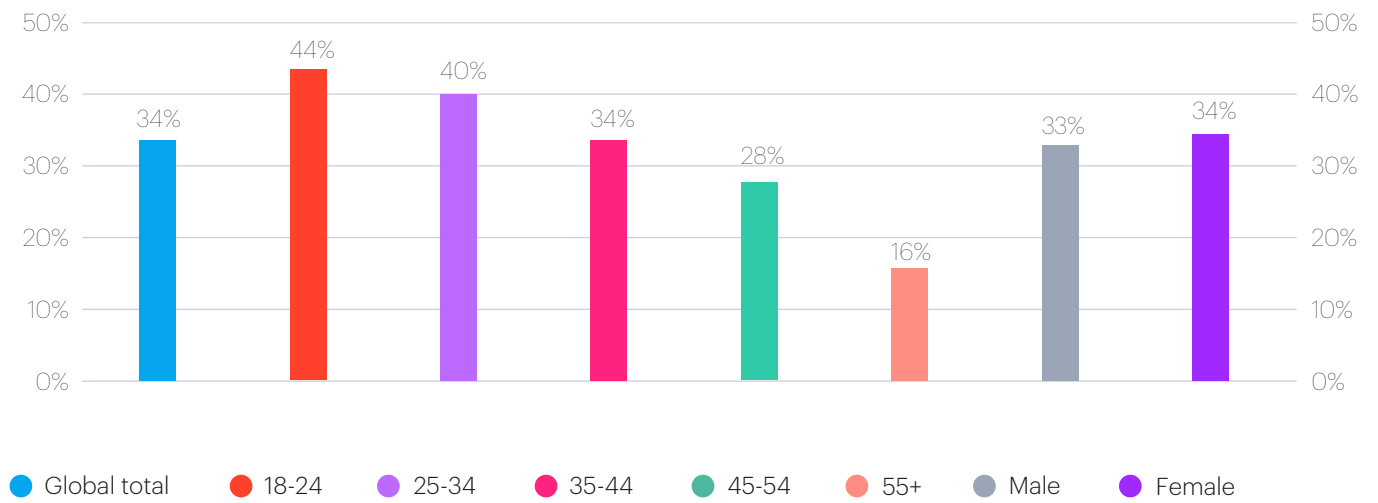
# Younger sports fans are more passionate about women's sports

As highlighted in **YouGov's Women in Sport Report 2021**, women's sports are currently less popular worldwide than men's sports. However, using YouGov Global Profiles data, we see a healthy appetite for women's sports, with over a third (**34%**) of global sports fans agreeing they prefer to watch women's events, compared to **30%** among the global population. In terms of the popularity of different sports, the Women in Sport Report 2021 revealed that football is the number one preferred women's sports globally, followed by badminton, basketball, and tennis.

Interest in women's sports is growing, and when looking at global attitudes to women's sports by age, there is significantly more interest among younger generations: the sports fans of the future! **44%** of global sports fans aged 18-24 prefer watching women's sports over men's, compared to only **16%** among global sports followers aged over 55. Interestingly, the views of male and female sports fans are perfectly aligned.



## Sports fans: 'I prefer watching women's sports over men's' – Net agreement by age and gender (Global)



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

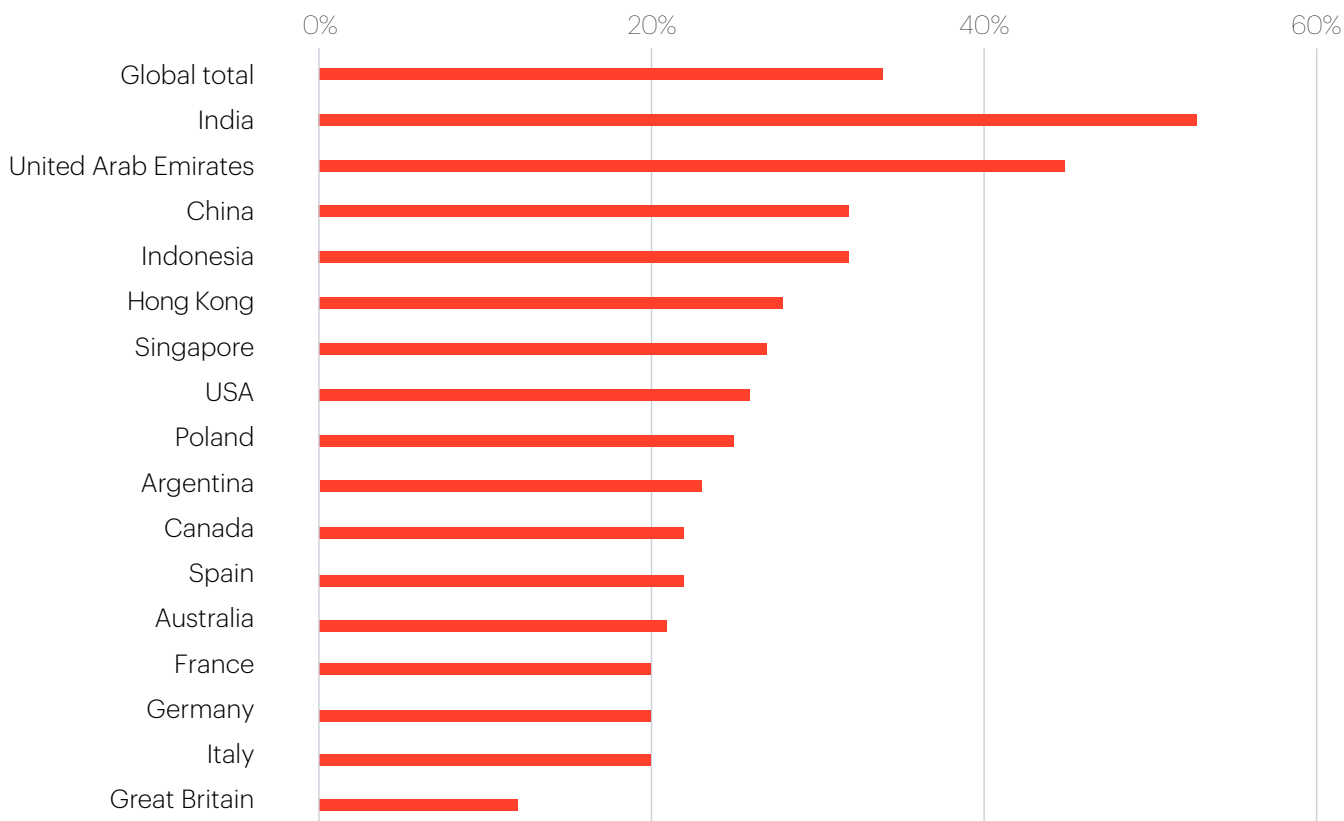
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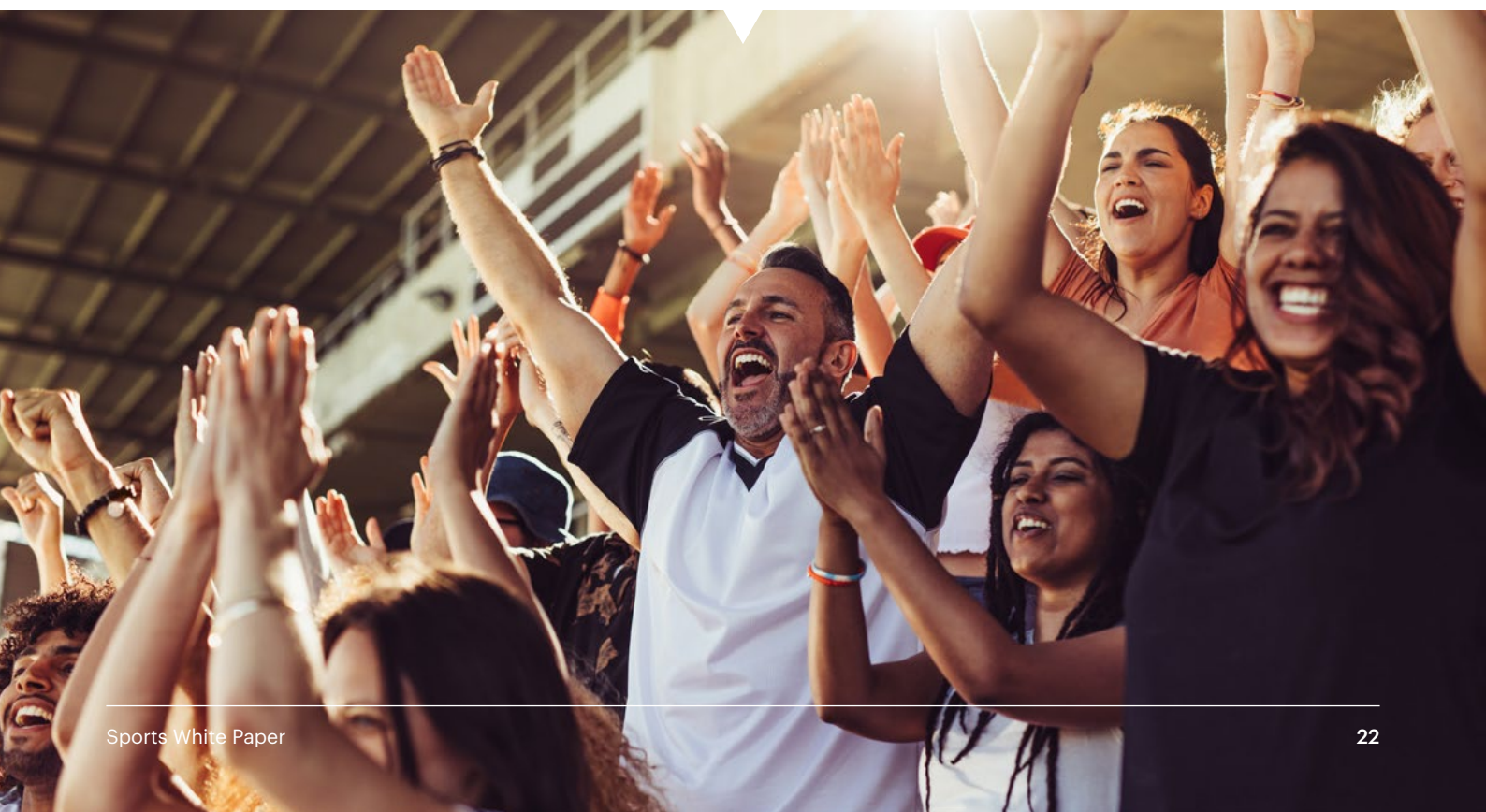
However, support for women's sports varies considerably by country. Whilst half of adult sports fans in India (**53%**) are more passionate about women's sports than men's, only **12%** of British fans have a preference for women's sports, suggesting there is still work to be done on delivering the regular media platform required for raising the profile and

interest of women's sports in some countries. Taking a deeper dive into sports fans in India, male and female opinion is similar (**51%** females vs **49%** males), whereas younger Indians are more likely to prefer watching women's sports over men's, rising to **56%** among 18-34s.

### Sports fans: 'I prefer watching women's sports over men's' – Net agreement by country



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.



# Global sports fans championing equal pay

Turning to the issue of equal pay for athletes, over two thirds (**68%**) of fans globally agree the salaries of athletes should be based on skill, and not gender. In addition, more than half (**51%**) of global sports fans are in favor that the winner of the FIFA Women's World Cup should earn the same as the winner

of the (men's) FIFA World Cup, and **56%** agree the prize money should be the same for both male and female tennis tournaments. These views around pay disparity are slightly more pronounced among female sports fans than males.

## Sports fans: Attitudes to equal pay – Net agreement by gender (Global)

Net agreed with pay disparity in sport globally	Sports fans	Male sports fans	Female sports fans
The salaries of professional sports people should be based on skill, not on gender	68%	67%	70%
Tennis tournaments should offer equal prize money to both men and women	56%	54%	58%
I believe the winner of the FIFA Women's World Cup should earn the same as the winner of the FIFA World Cup	51%	49%	55%

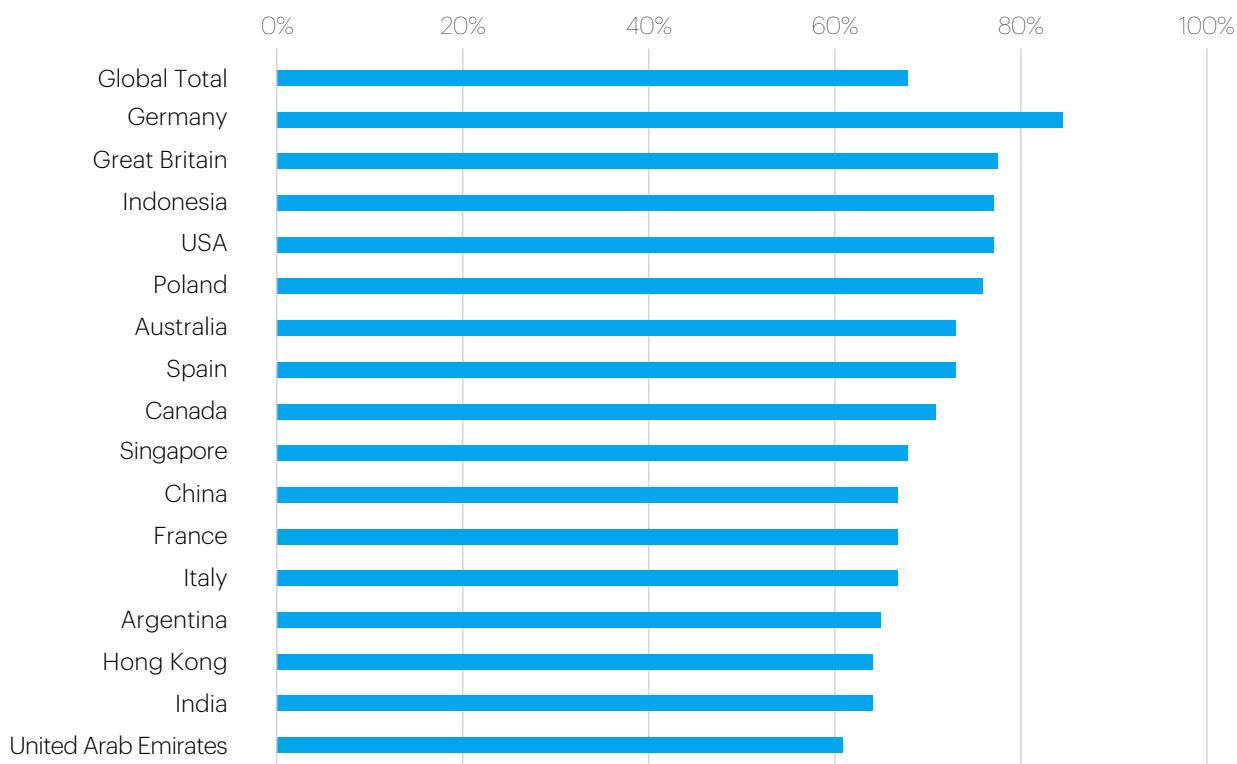
Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

Comparing different markets' views on pay needing to be reflective of skill rather than gender, more than six in ten sports fans share this opinion across all 16 analyzed countries. However, some countries have a stronger view on this subject, namely Germany (**84%**) and Great Britain (**78%**), and US and Indonesia (both **77%**).

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## 'The salaries of professional sports people should be based on skill, not gender' – Net agreement by country



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

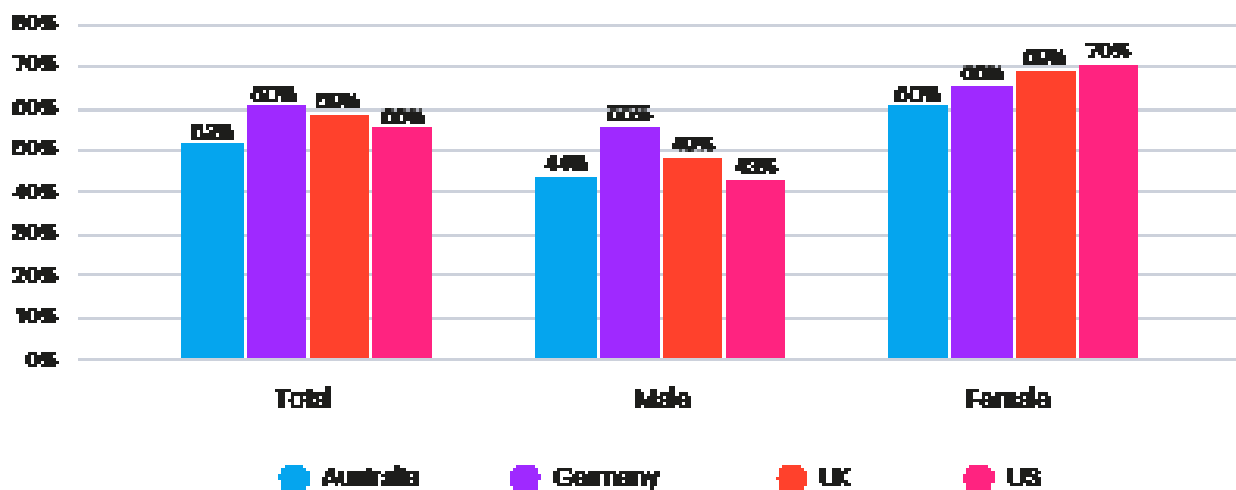
Whilst passion and interest for women's sports has not quite reached the same level as men's sports, there is a high demand among sports fans for female athletes to be paid equally and fairly. YouGov Direct data from May 2022 explored fair pay for female sports athletes. We see more than half in disagreement that sportswomen are paid fairly, considerably outweighing those in agreement. American sports fans are slightly more likely than their counterparts in Germany, UK, and Australia to tip the scales towards

agreement, with around a third agreeing female athletes are fairly paid, compared to a quarter or less in the other countries.

Focussing on the views of males and female sports fans across the four markets, female sports fans are more likely to disagree that women athletes are paid fairly compared to their male counterpart.



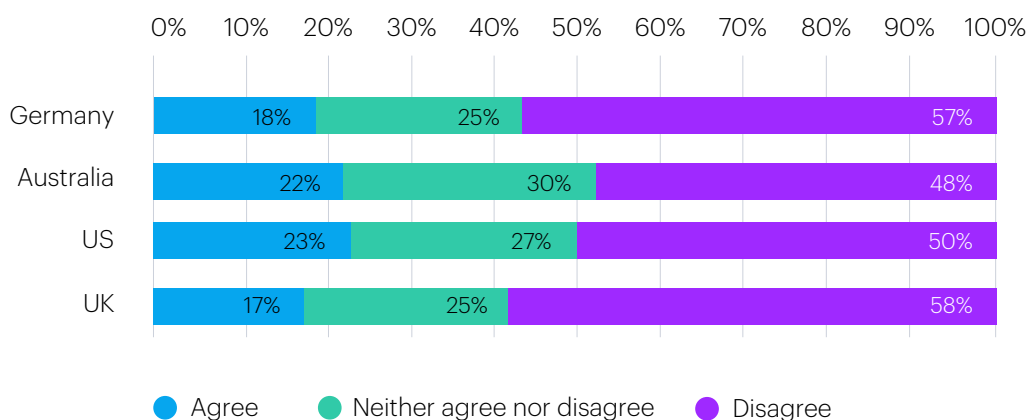
## Male and female sports fans: Disagreement with the statement 'Women athletes are paid fairly compared to male athletes' – By country



There is also a feeling among fans that females are underrepresented in senior positions in the sports industry. More than double the proportion of sports fans disagree, than agree, that women are fairly represented in senior

positions, suggesting a significant need for greater gender diversity within sports executives. Less than one in five overall agree that women are fairly represented in senior levels in the sports industry.

## Sports fans: 'Women working in the sports industry are fairly represented in senior level roles' – Agreement by country



Q: How much do you agree or disagree with the statement: "Women working in the sports industry are fairly represented in senior level roles."

German and British sports fans have the highest level of disagreement that women are underrepresented (57% and 58% respectively) compared to around half of Australian and US fans (48% and 50%).

Comparing opinions amongst female and male sports fans in the four markets, again female sports fans are more likely to disagree that women in sports are fairly represented in senior positions.

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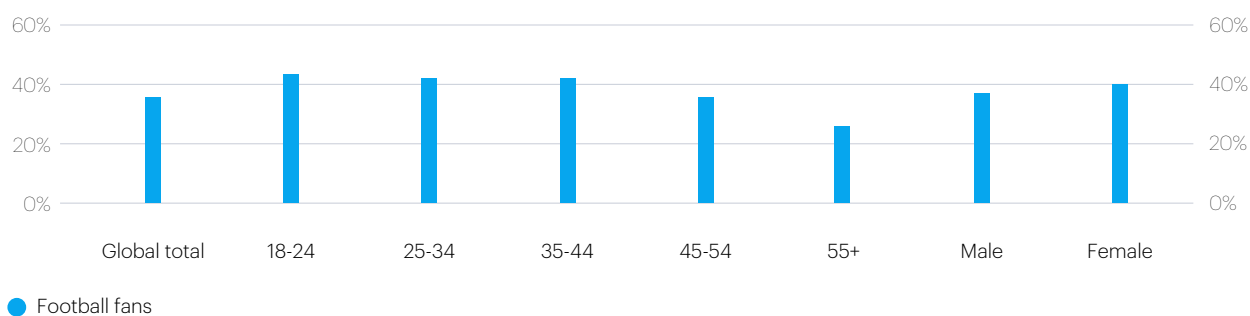


# Spotlight on women's tournaments

The 2022 women's sports calendar will feature a major quadrennial football event, with England hosting the UEFA Women's EURO England 2022. With such an important international female tournament scheduled, what are the views of global football fans when specifically asked about their attitude to women's football?

Nearly **40%** of global football fans are 'really passionate about women's football and FIFA Women's World Cup'. Looking to female fans, we see a slightly higher proportion of women who are more enthused about women's football and the FIFA World Cup than men, and under 45-year-old football fans having higher levels of passion vs. their older counterparts.

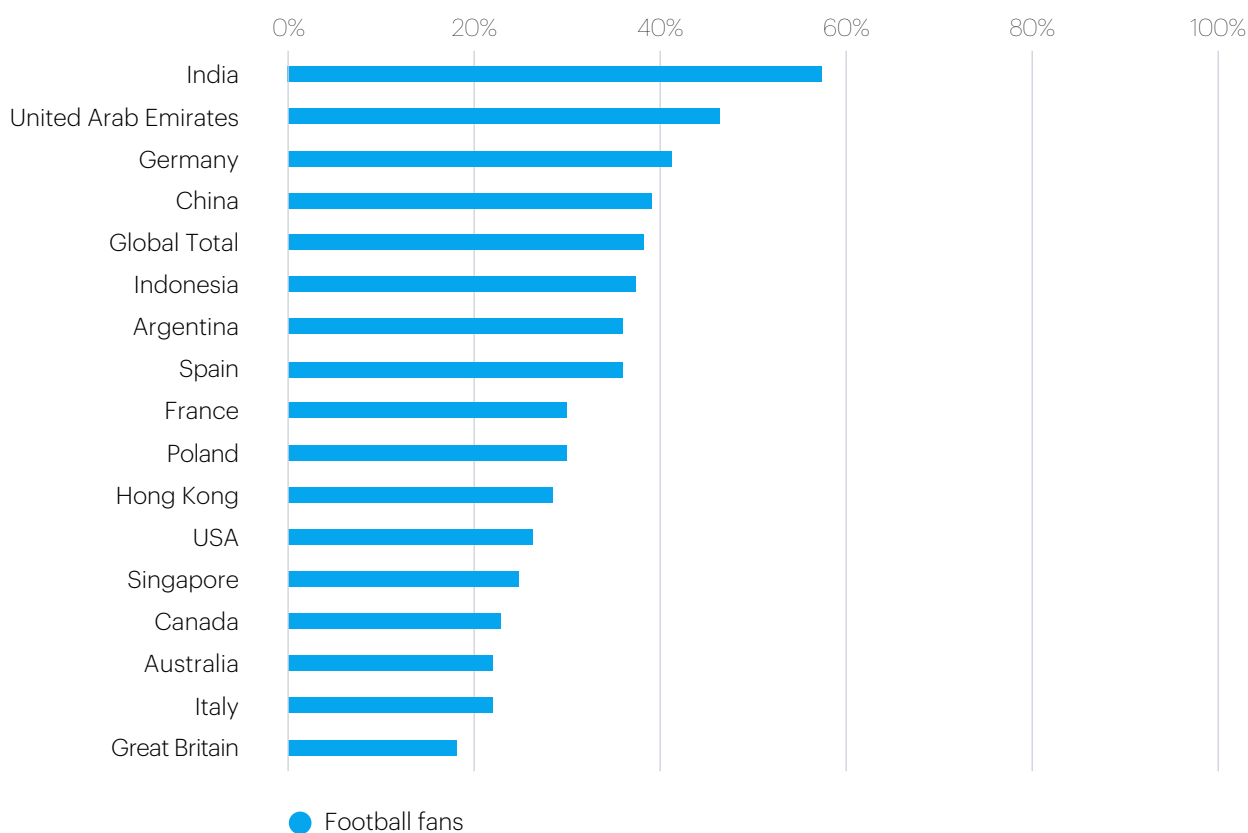
## Football fans: 'I'm really passionate about women's football and FIFA Women's World Cup' – Net agreement by age and gender



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

However, support for women's football and the FIFA Women's World Cup varies considerably by country. More than half of adult football fans in India are passionate about women's football and the FIFA Women's World Cup, compared with less than **20%** of British football fans. Other countries showing their passion for women's football include UAE, Germany, China, and Indonesia.

## Football fans: 'I'm really passionate about women's football and FIFA Women's World Cup' – Net agreement by country



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.





## Section 2

# What do sports fans expect from sports organizations?

The global fan base cares about social issues relating to the environment, equality, diversity, and inclusion and it is looking for sports rights holders and athletes to support social causes that matter to them. There is a desire among the sporting world that sports rights holders should be leading the way on social responsibility and fans will hold these organizations to account if they aren't authentic and transparent in articulating and delivering their social promise.

In this section we explore what sports fans want from brands, the causes that they feel are acceptable for brands to make a stand on, the issues they would like their favorite sports teams to actively support, and where improvements can be made. We also shine a spotlight on a subgroup of sports fans, the socially conscious fan.



## Who is the socially conscious sports fan?

For the purposes of this report, we have defined the socially conscious sports fan as Sports fans who agree with one of the following statements 'I try to buy only from companies who are socially and environmentally responsible' or, 'I like brands that are willing to get involved in social issues'. The socially conscious sports fan represents **59%** of the global population and make up more than two thirds of the global fan base (**67%**).

Global Profiles shows that the average age of the sports fan is 39, and only slightly younger for socially conscious sports fans (38). Similarly, there is little differentiation by gender.

**56%** of socially conscious sports fans are men, compared to **57%** of broader sports fans.

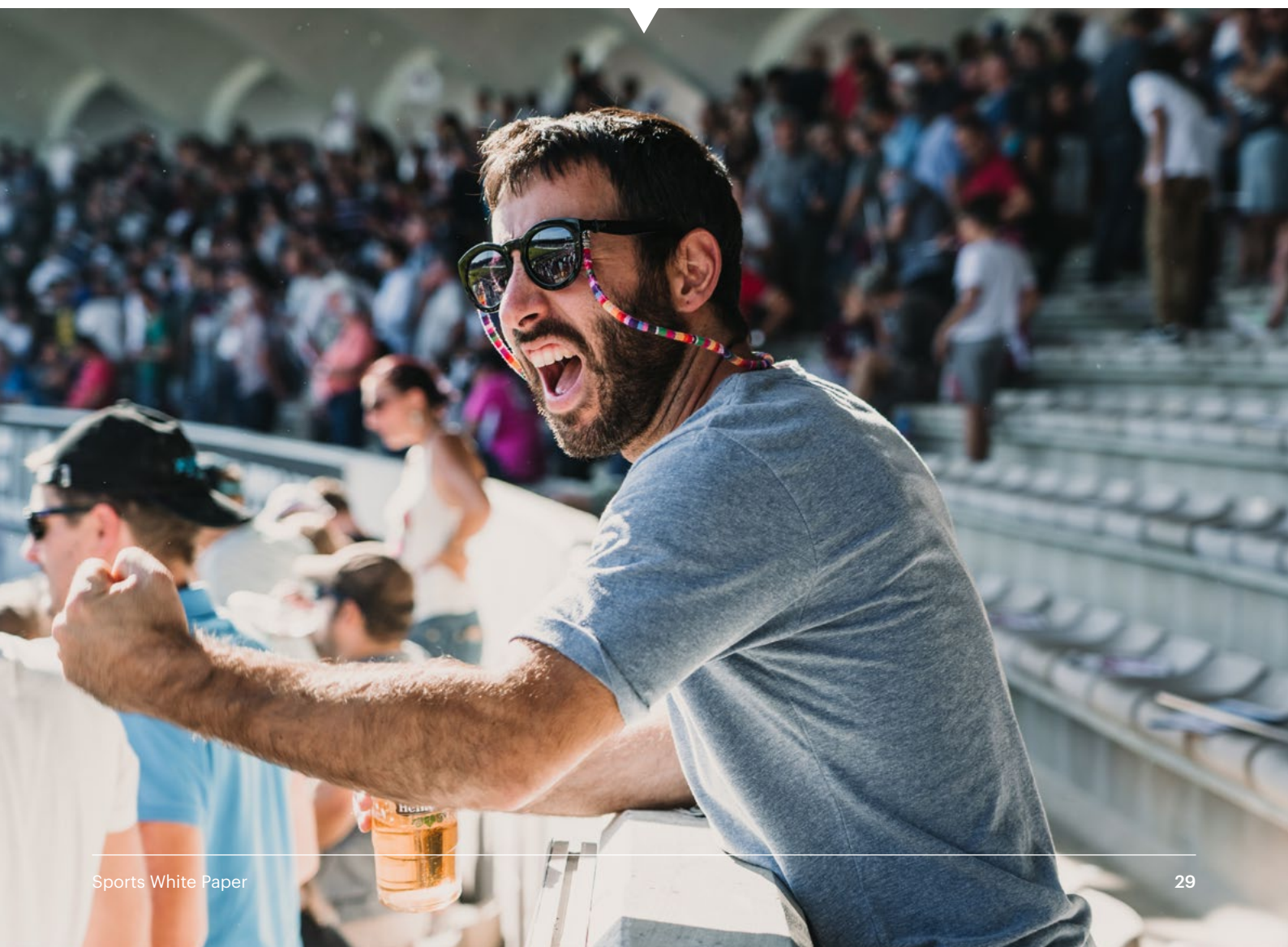
Interesting, socially conscious sports fans differentiate from broader sports fans in the areas of life stage and attitudes.

For example, **40%** of socially conscious sports fans have kids aged under 18 at home, compared to **36%** of general sports fans. This data suggests the social and environmental values of these younger generations in the household may well be rubbing off on their sports enthusiastic parents.

Turning to attitudes, socially conscious sports fans are more likely to be health conscious – with a focus on organic and natural food, tech-savvy and more creative and cultural in their outlook on life than general sports fans.

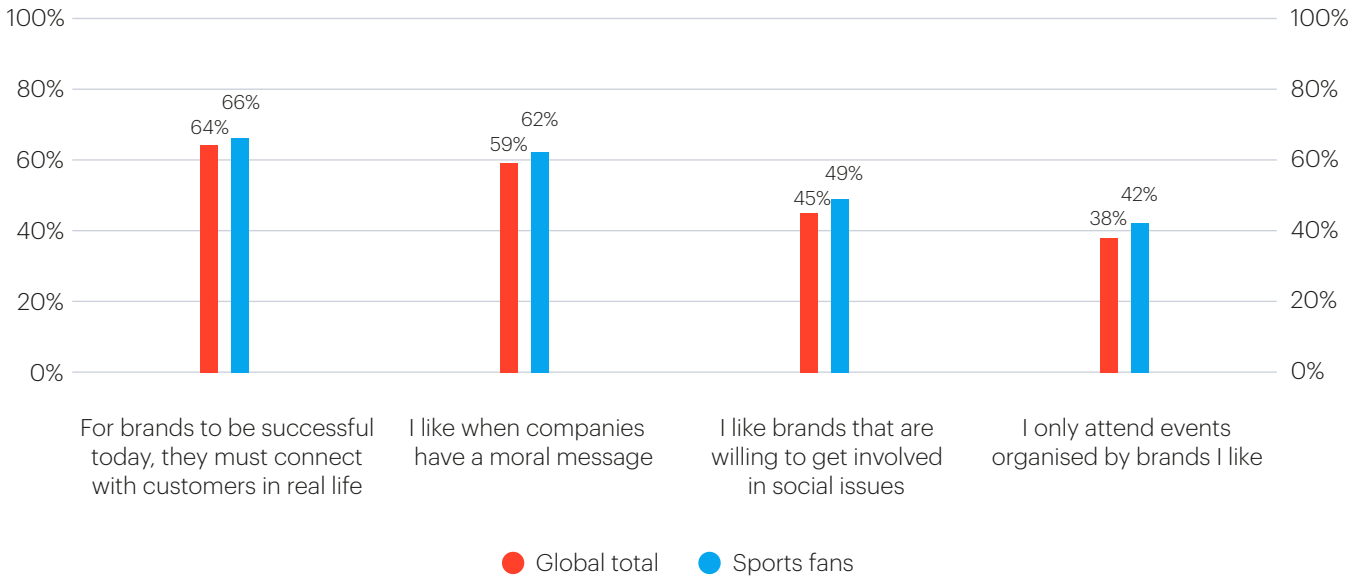
## Fans like brands that take a social and moral stand

Data from YouGov Global Profiles reveals that when it comes to brands, sports fans are slightly more likely than the global population to think positively about brands and companies that communicate ethical messages (**62%** vs. **59%** global total) and are willing to get involved in social issues (**49%** vs. **45%** global total).





## Attitudes toward socially conscious brands - Net agreement (Global)



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

In addition, two thirds of global sports fans agree that a brand's success should be built on creating a real-life connection with its customers (**66%**). Sports fans are seeking more from brands and companies than just merely the products or services they offer, but they want their preferred brands to align with their values and make a positive contribution to society.

Not only do sports rights holders and their sponsor brands have an important role to play in making a difference and acting as good corporate citizens, more and more athletes

now also acknowledge they are role models, and can often use their image and influence to drive change. Global sports fans also recognize this, with almost two thirds of sports fans (**65%**) agreeing that 'Professional sports people should behave like role models' (compared to **61%** of the global population) - and this is even more pronounced among socially conscious sports fans, increasing to **71%**. The role of sports personalities to influence change will be covered further in section three of this report.

## 'Professional sports people should behave like role models' – Net agreement (Global)



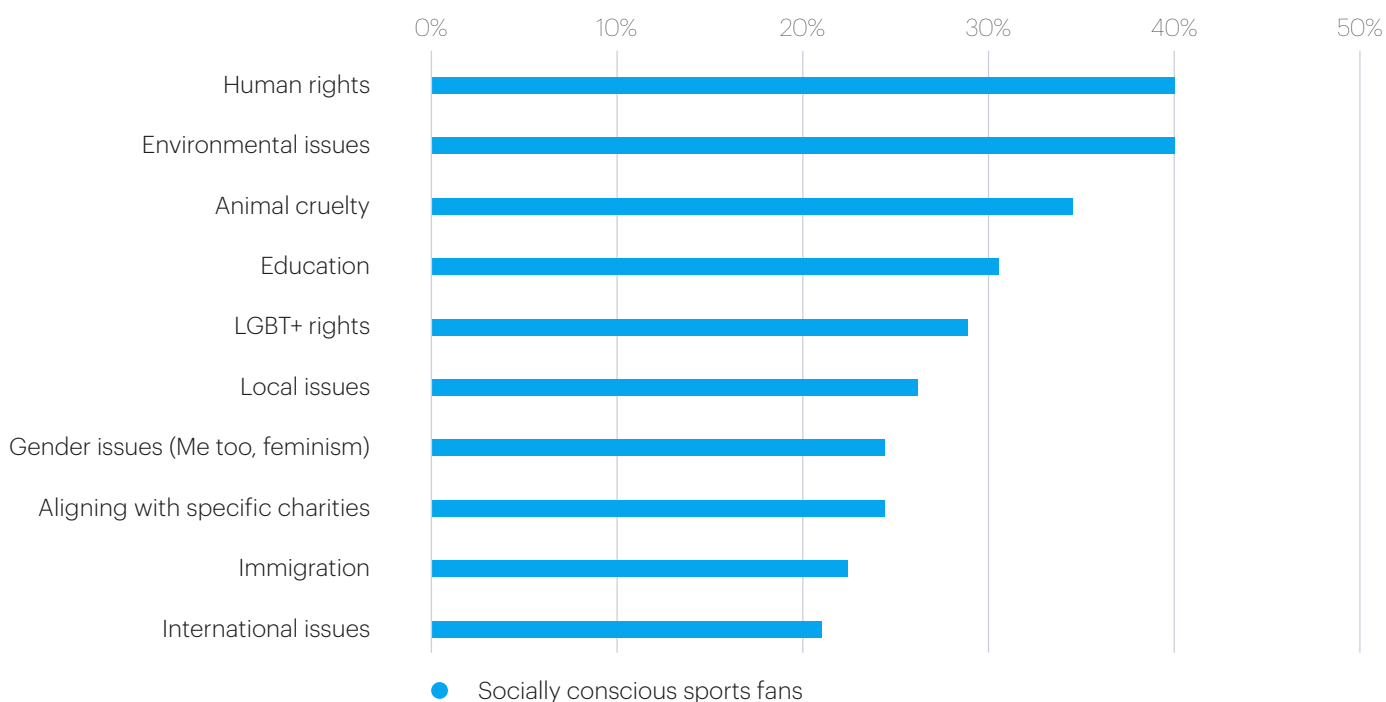
Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

# Americans welcome brands that support humanitarian and environmental issues

YouGov US Profiles data provides further insight into which issues socially conscious sports fans consider acceptable when companies communicate their brand messages to consumers. Out of a list of 20 factors, Human Rights and Environmental Issues emerged as the top two most acceptable values for brands to promote. Among socially responsible sports fans, all environmental and societal issues

are deemed even more acceptable for companies to convey their point of view in their marketing communication. This data is particularly important for sports marketers looking to align brands with appropriate messaging for the socially conscious sports fan.

## Socially conscious sports fans: 'Issues considered acceptable in a brand's communications' - Net agreement by country (US Top 10)



Q: In which, if any, of the following areas is it acceptable for a brand to communicate their point of view in marketing materials or other communications?

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# Socially conscious sports fans are looking for a genuine connection with brands

YouGov US Profiles data shows that US socially conscious sports fans want brands to be genuine and authentic, aligning their values with society, understanding everyday challenges, and showing they care.



Q: In general, how important, or not, is it, that brands you like act and communicate in the following ways? % somewhat important/very important

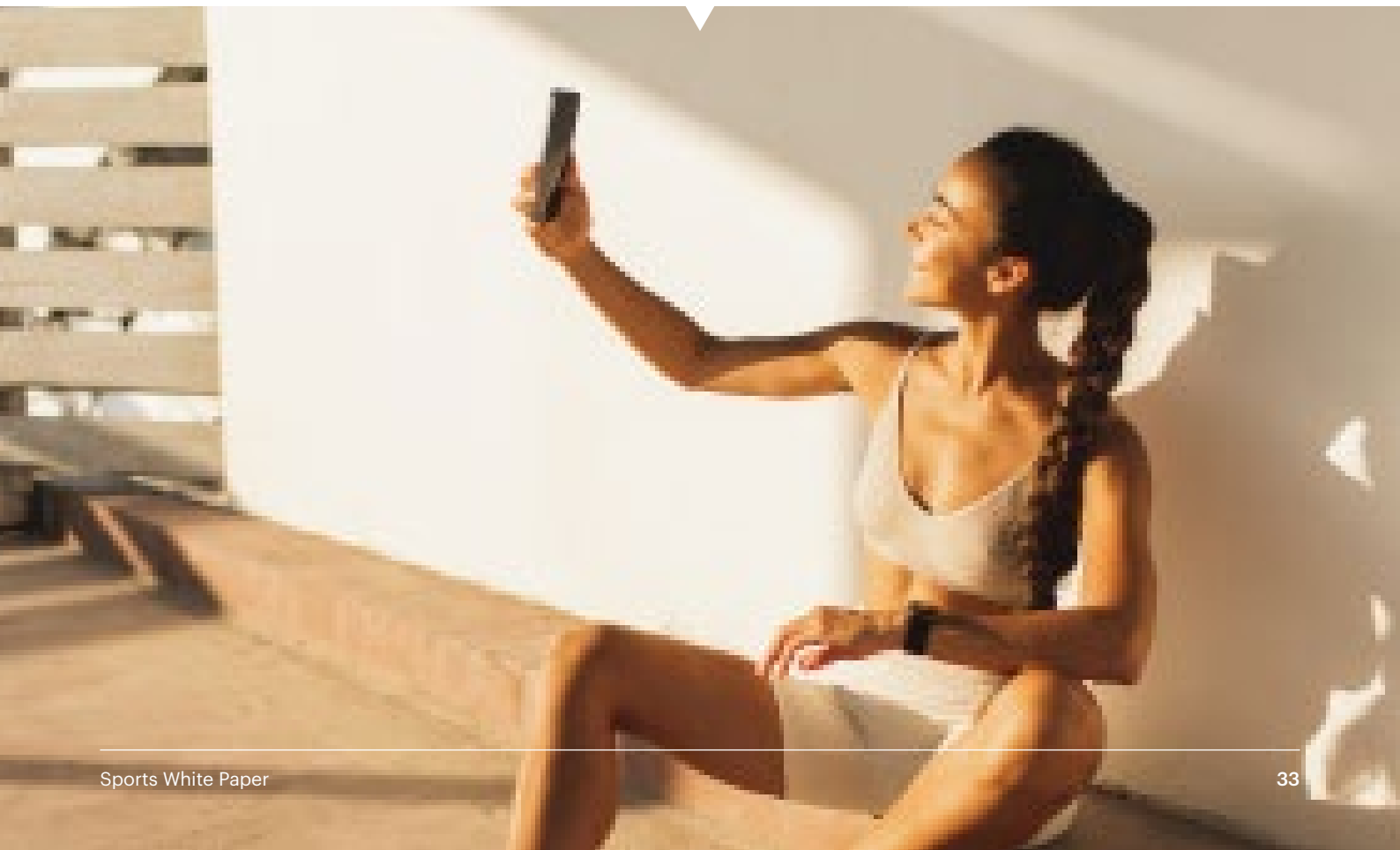
# They seek brands to be authentic and transparent

**84%** of US socially conscious sports fans say authenticity and being genuine are important brand attributes. Authenticity and transparency help build brand trust and loyalty, which are essential ingredients to encourage purchase and recommendation/advocacy.

## The value of brand stance

**85%** of US socially conscious sports fans feel it is important for brands to show they care, and the same proportion think it is important that brands understand the everyday challenges people face. Connecting with sports fans on an emotional level and showing empathy with the issues that matter to them reinforces their support for brands that have a purpose. This is further confirmed by more than seven in ten US socially conscious sports fans (**78%**) stating it is important for brands to stand for something, and **58%** stating it is important for brands to have a clear/transparent view on wider issues in society.

Brands that are socially responsible can hope to be rewarded with an elevated relationship with sports fans. The challenge for sponsor brands and sports rights holders alike is to create campaigns that feel authentic and emphasize their mutual appreciation for social issues and sports.





# Sports fans looking for sports rights holders to lead the way

Recent YouGov Direct data reveals that sports fans feel it is appropriate for sports rights holders and athletes to get involved with social causes. Across the four countries surveyed, a sports representative appears in the top five public figures for whom it is appropriate to support social causes. Sports teams and leagues appear first second among the UK and Australian fan base, and within the top three for German sports fans.

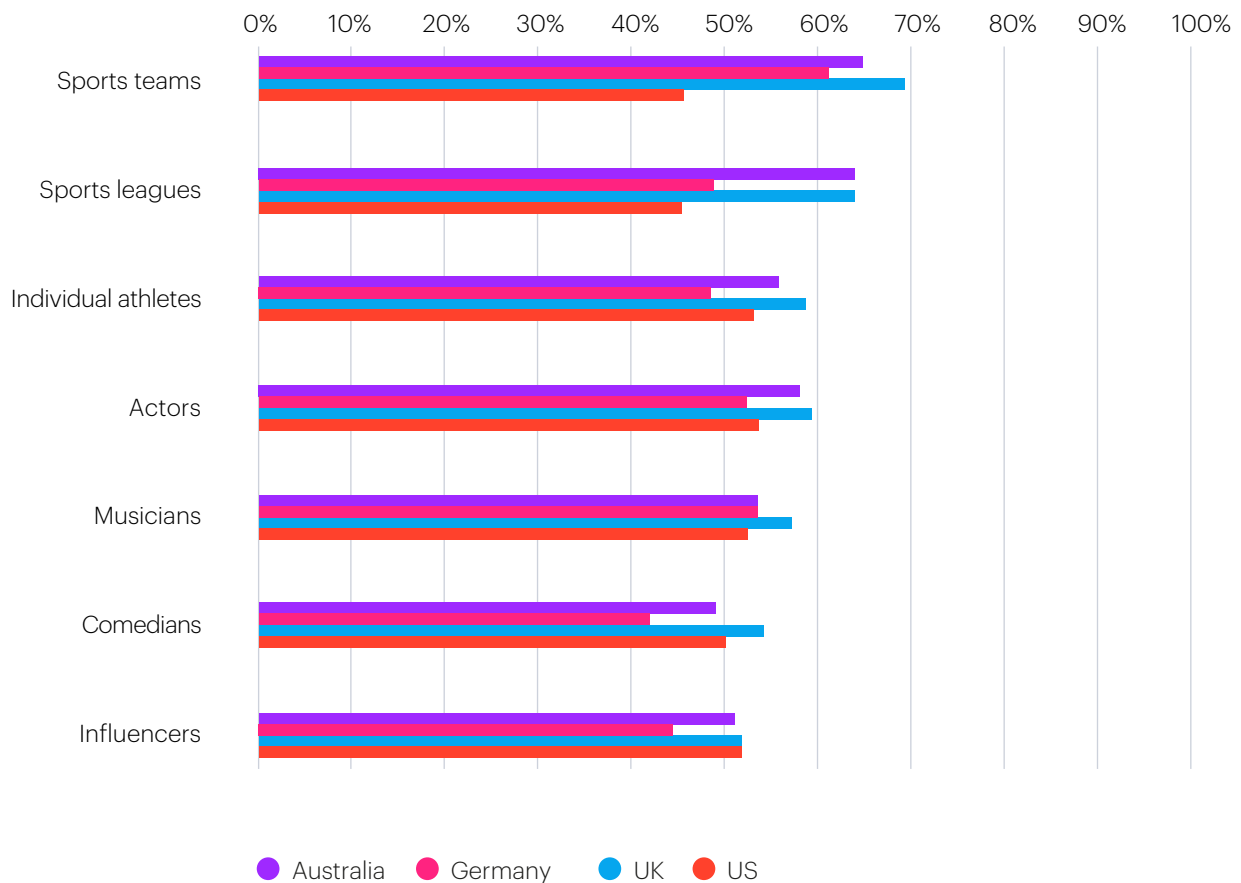
## Sports fans: Top five most appropriate supporters of social causes by country

Top Five	Australia	Germany	UK	US
1	Sports teams	Sports teams	Sports teams	Individual athletes
2	Sports leagues	Musicians	Sports leagues	Actors
3	Actors	Actors	Actors	Influencers
4	Individual athletes	Sports leagues	Individual athletes	Musicians
5	Musicians	Individual athletes	Musicians	Comedians

Q: For which, if any, of the following do you think it is appropriate that they support social causes?

Sports athletes rank in the top five among sports fans in all four markets, but for Americans they rank first. In fact, American sports fans feel that individual personalities overall are the most appropriate advocates to support social issues, ahead of sports teams and leagues.

## Sports fans: Most appropriate supporters of social causes by country



Q: For which, if any, of the following do you think it is appropriate that they support social causes?

# Make a stand for anti-racism

Looking at the types of causes sports fans would feel positively about their favorite sports league or team supporting, anti-racism ranks in the top three across all four markets. For British and Australian fans, it ranks as the top, most important societal cause, and is in the top two for US and Germany.



## Sports fans: Top three causes feel positively about favorite sports league or team actively supporting by country

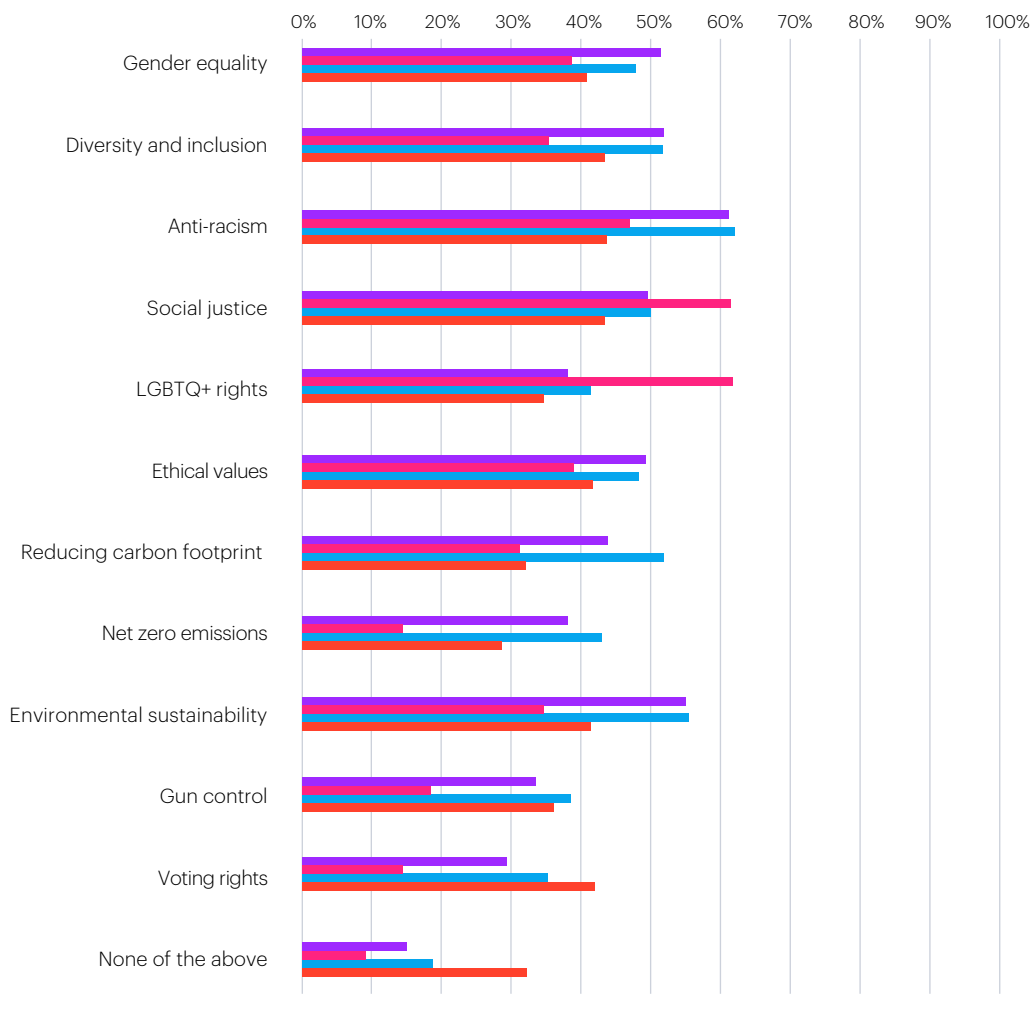
Top Five	Australia	Germany	UK	US
1	Anti-racism	Social injustice	Anti-racism	Social injustice
2	Environmental sustainability	Anti-racism	Environmental sustainability	Anti-racism
3	Gender equality	Gender equality	Diversity and inclusion	Diversity and inclusion

Q: Which, if any, of the following causes would you feel positively about your favorite sports league or team actively supporting?

Environmental and sustainability concerns rank in the top two for the UK and Australia and Diversity and Inclusion appear third for American and British fans. Australian and German sports fans place gender equality in the top three and social justice is top among American and German sports fans causes that they would feel positively about their favorite sports franchise supporting.

Looking at other causes, British sports fans are more likely to cite environmental issues, such as reducing carbon footprint and net zero emissions, along with LGBTQ+ rights, compared to the other countries. American sports fans over-index on voting rights.

### Sports fans: Causes you feel positively about your favorite sports league or team supporting by country



Q: Which, if any, of the following causes would you feel positively about your favorite sports league or team actively supporting?

# More can be done

Whilst sports fans look positively on sports rights holders supporting the issues that matter to them, and making a stand on addressing them openly, there is still work to do in order to maximise their positive impact in the sports world.

When it comes to areas in which sports rights holders are not doing enough, the fight for anti-racism ranks in the top three across all four countries, and ranks as the top priority for Australian and German sports fans. Environmental issues weigh heavy on British sports fans' minds, along with anti-racism. Gender equality ranks in the top three for Australian and German fans.

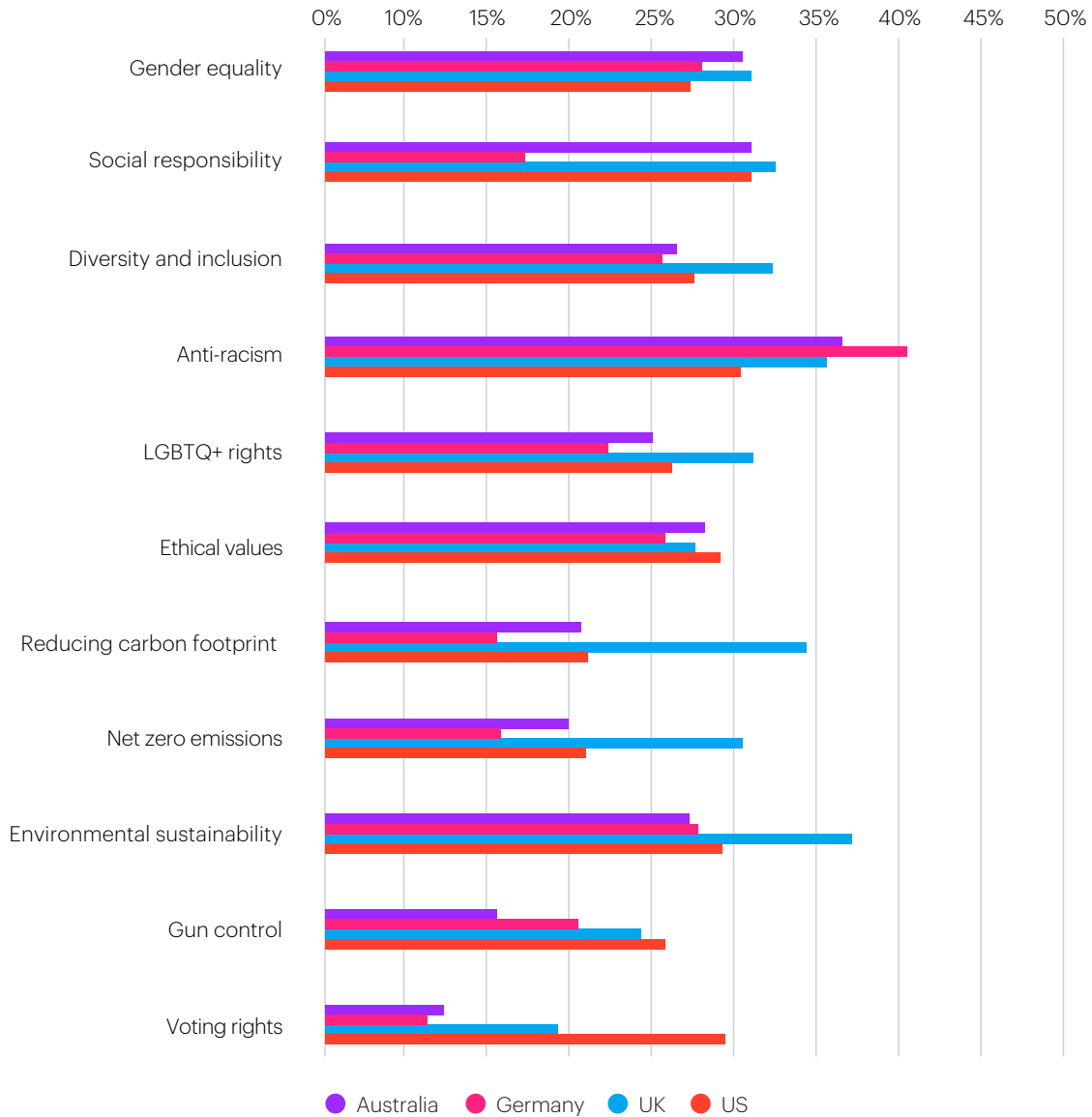
## Sports fans: Top three causes sports fans believe sports leagues should be doing more to support by country

Top Five	Australia	Germany	UK	US
1	Anti-racism	Anti-racism	Environmental sustainability	Social responsibility
2	Social responsibility	Environmental sustainability	Anti-racism	Anti-racism
3	Gender equality	Gender equality	Reducing carbon footprint	Voting rights

Q: In which of the following areas do you believe sports leagues and teams are not doing enough to support?



## Sports fans: Areas believe sports rights holders are not doing enough by country



Q: In which of the following areas do you believe sports leagues and teams are not doing enough to support?

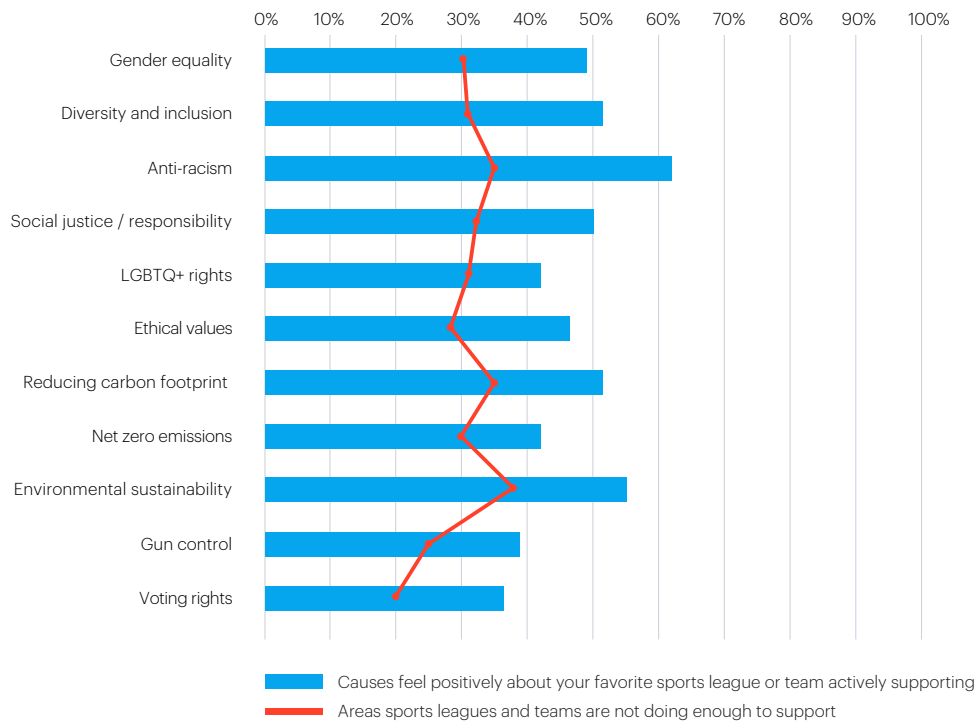
British sports fans not only over index on environmental causes, but also wanting more to be done around gender equality, diversity and inclusion and LGBTQ+ rights. Further, around three in ten Australian (**30%**), American (**28%**) and German fans (**28%**) also believe more can be done on gender equality.

Comparing each individual country’s views on the causes they feel positive about vs. those they feel sports leagues should be doing more on, we see a clear correlation between the causes that sports fans feel their team/league should actively support and where further work is required. For British sports fans, for example, more than six in ten feel positively about sports leagues supporting anti-racism, an issue that, along with environmental concerns, ranks highly as one that more could be done to support.

► [UNDERSTAND MORE ABOUT THIS DATA](#)



## Causes feel positively about your favorite sports league/team actively supporting and areas where they are not doing enough (UK)



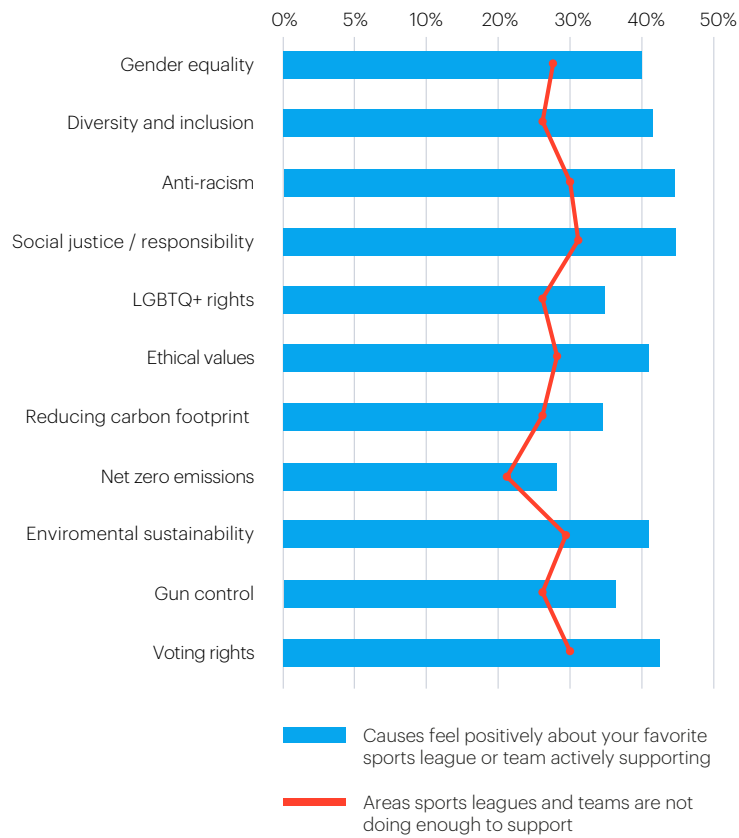
Q. Which, if any, of the following causes would you feel positively about your favorite sports league or team actively supporting?

Q. In which of the following areas do you believe sports leagues and teams are not doing enough to support?



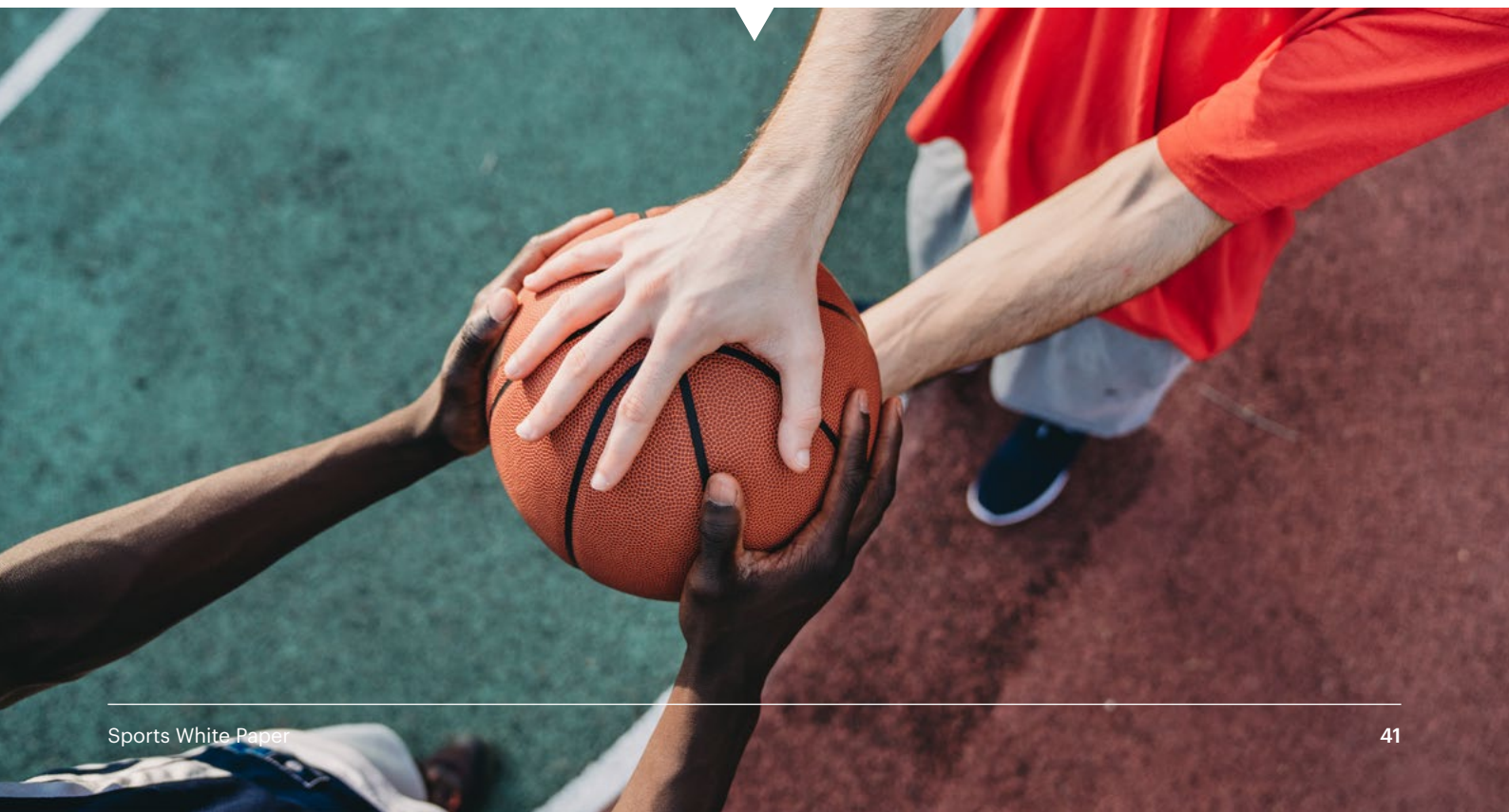
## Causes feel positively about your favorite sports league/team actively supporting and areas where they are not doing enough (US)

In the US, anti-racism, social justice and reducing carbon footprint are areas that rate highest for sports leagues to do more to support (**35%**).



Q. Which, if any, of the following causes would you feel positively about your favorite sports league or team actively supporting?

Q. In which of the following areas do you believe sports leagues and teams are not doing enough to support?



# Sports leagues making a stand

Tackling racism has become a more urgent priority for sports leagues in recent years. Among other things, controversies such as the Yorkshire County Cricket Club scandal, the racial abuse Black players received from fans in the wake of the Euro 2020 final, and the ongoing row over the treatment of Colin Kaepernick have reinforced the need to focus on equality, diversity, and inclusion on a global level.

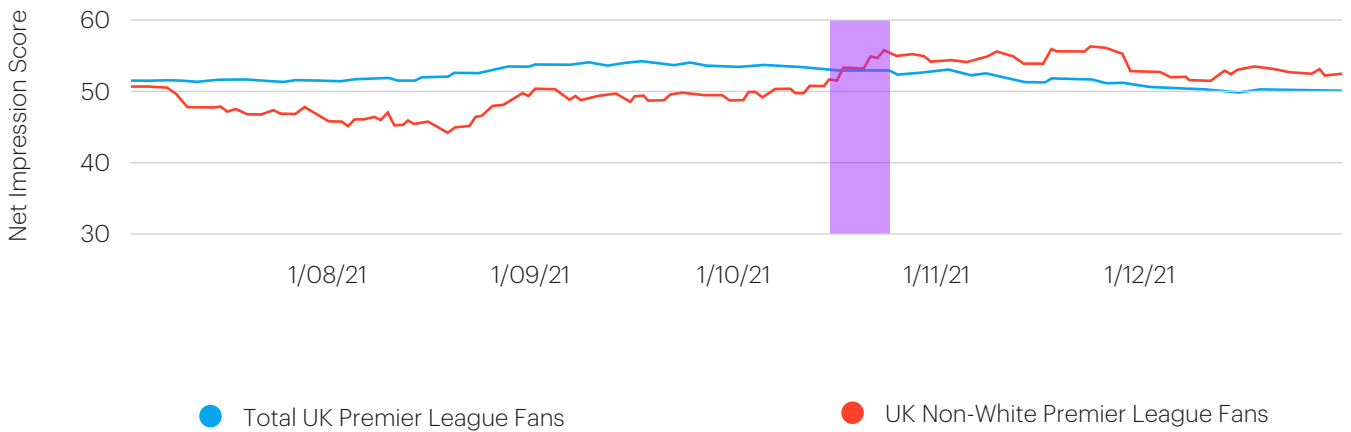
The English Premier League's No Room for Racism and the NFL's Inspire Change campaigns have been two major initiatives designed to make a stand against racist prejudice and discrimination in sports. The impact of each campaign is demonstrated in the examples below.



## Premier League ‘No Room for Racism’ campaign October 2021

The English Premier League’s “No Room for Racism” initiative was launched in February 2021, calling football clubs, players, and fans together to combat and speak out against all forms of racism, on and off the pitch. Later the same year, the League ran a major campaign supporting the NRFR cause during matches held from October 16-24. Looking at YouGov BrandIndex data, the positive impact of the campaign on British fans is clear: Net Impression of the EPL among non-white fans of the League in the UK increased substantially directly following the campaign period.

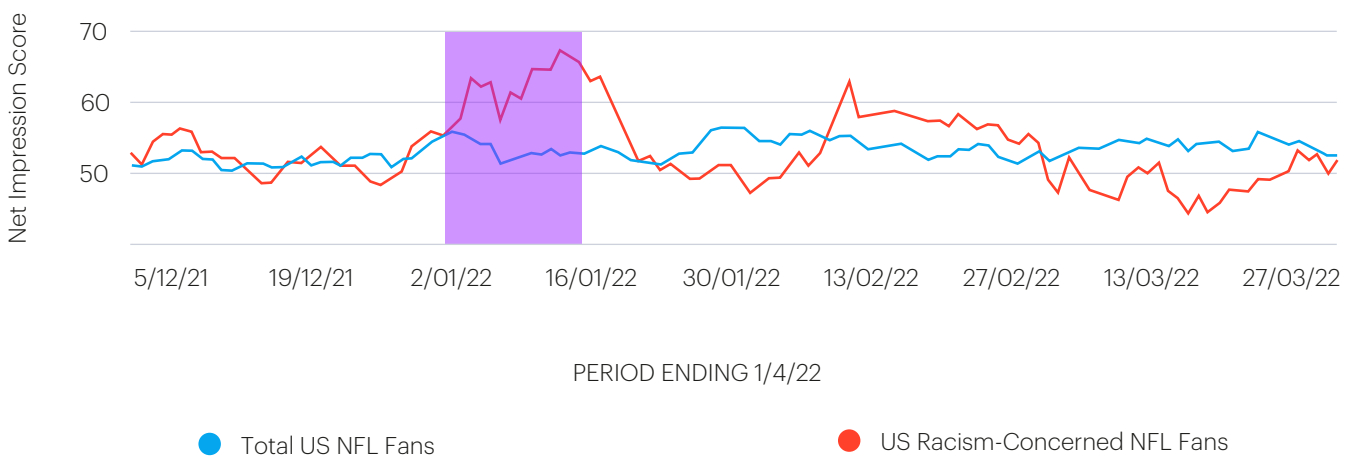
UK Premier League Fans – Net Impression of English Premier League (August – December 2021)



## NFL ‘Inspire Change’ anti-racism campaign January 2022

The NFL’s social justice initiative “Inspire Change” was founded in 2017, with a goal of raising \$250M over 10 years in support of breaking down barriers to opportunity and equality. During the first two weeks of January 2022, the league ran an Inspire Change campaign specifically focused on combatting racism. YouGov BrandIndex data demonstrates how well this resonated with US NFL fans: among those fans who (via YouGov Profiles data) indicate racism is an important issue to them, a sizeable positive lift in impression of the NFL is observed during this exact time period.

US NFL Fans – Net Impression of National Football League (December 2021 – March 2022)



► [SPEAK TO A RESEARCHER](#)



### Section 3

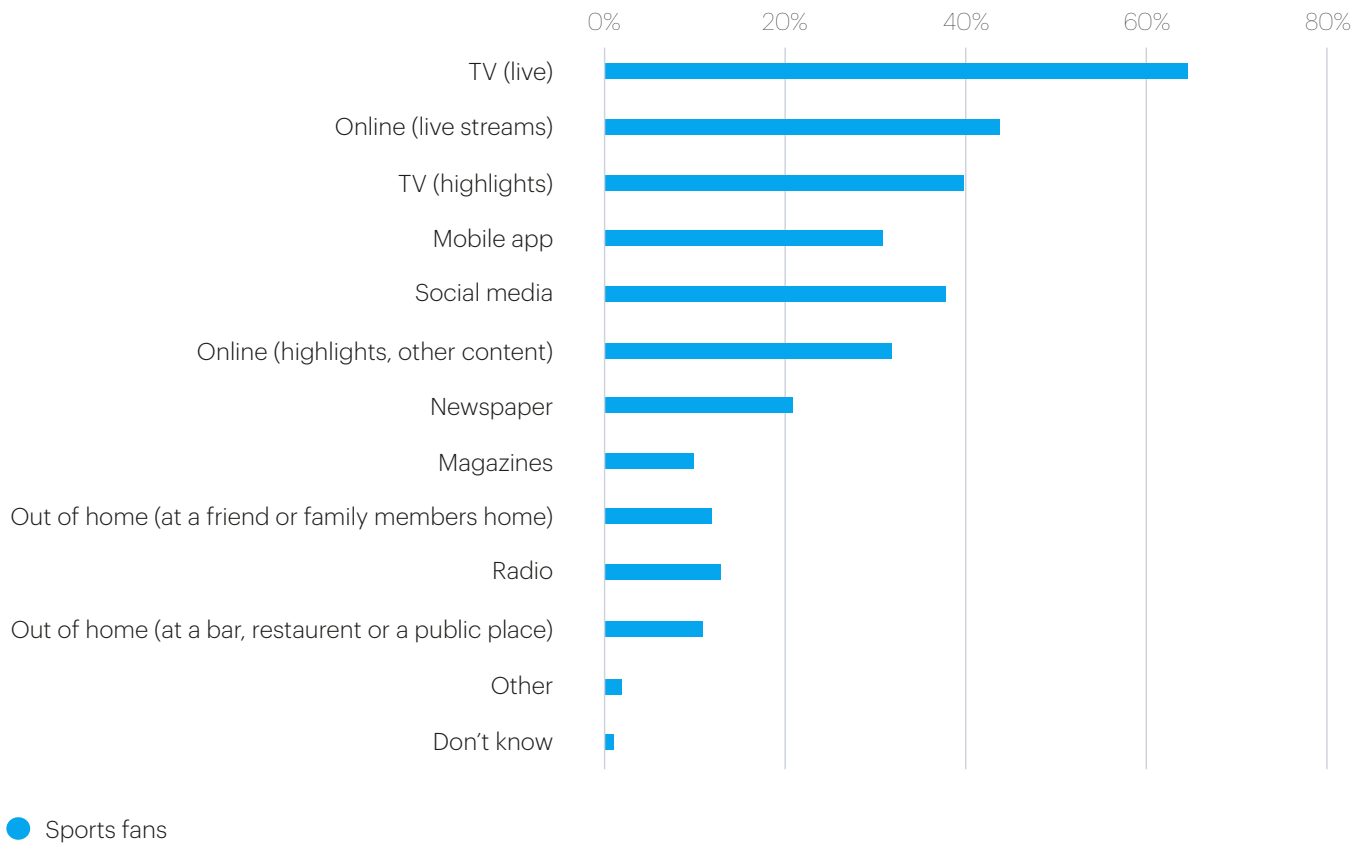
# Engaging with socially responsible sports fans

With the growing interest in sustainability and social issues among sports fans, it is essential for marketers to understand how to reach these 'socially conscious' sports enthusiasts with the right media and marketing messages. In this section, we explore what types of media sports fans use to follow their favorite sports teams and leagues, their attitudes towards advertising and sponsorship, and how their consumption patterns and behaviors compare to the socially conscious sports fan.

## Media sports fans use to follow sports

Looking at YouGov Global Fan Profiles data, almost two thirds of sports fans (**65%**) are most likely to watch/follow sports by tuning in to live sports coverage on their TVs, followed by online streaming (**44%**). Almost four in 10 sports fans (**38%**) follow/watch sports on social media.

### Sports fans: Media used to watch/follow sports (Global)



Q: Which of the following, if any, do you use to watch/follow sports?

When we look at consumption of news among global consumers using YouGov Profiles data, once again TV is dominant, followed by social media. Importantly, use of all media types for news is higher among sports fans, increasing further among 'socially conscious sports fans,' with social media gradually closing the gap on TV.

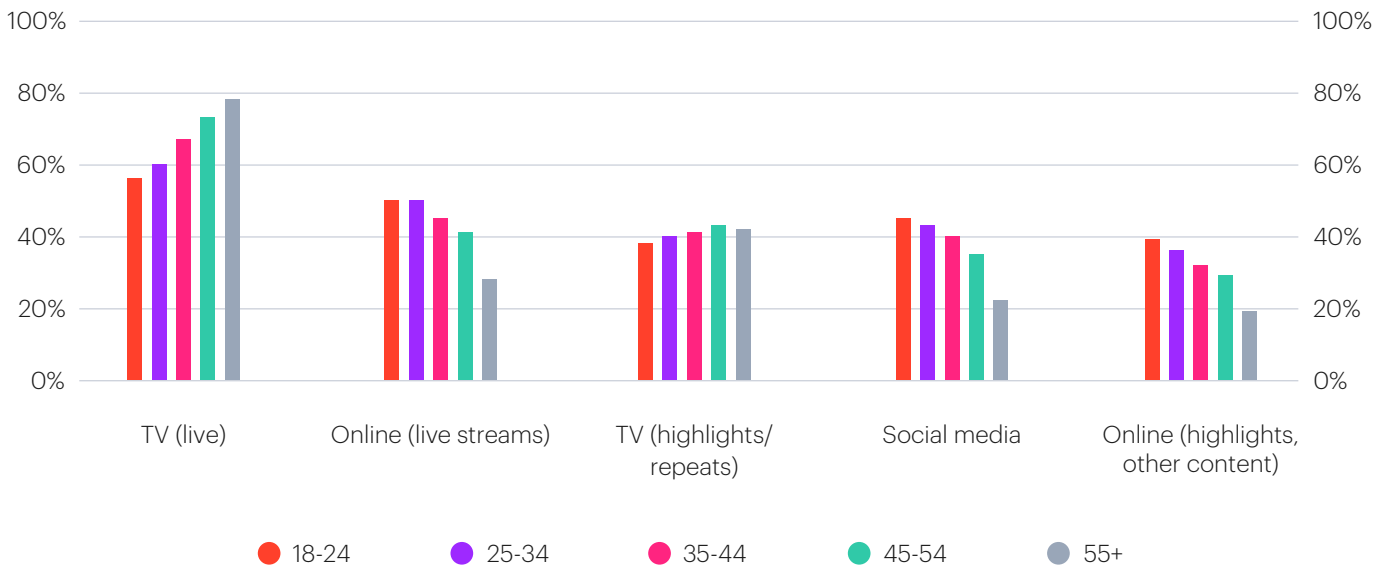




Social media is not only important to global sports fans, but it is an essential consideration for marketers and brands looking to communicate sustainable and cause related marketing messages to this audience, and Gen Z sports fans – the audience of the future – are key. Looking at the media used to watch/follow sports by age, although live TV is still the most popular choice for fans across all age groups,

YouGov Global Fan Profiles data reveals that younger fans are 16 percentage-points more likely to stream live sports coverage online than those aged 55+ and twice as likely to follow sports through social media. This is significant for Gen Zs who are not only more engaged in digital communications including social media, but also care more about sustainability and environmental issue than other generations.

### Sports fans: Media used to follow sports by age (Global Top 5)



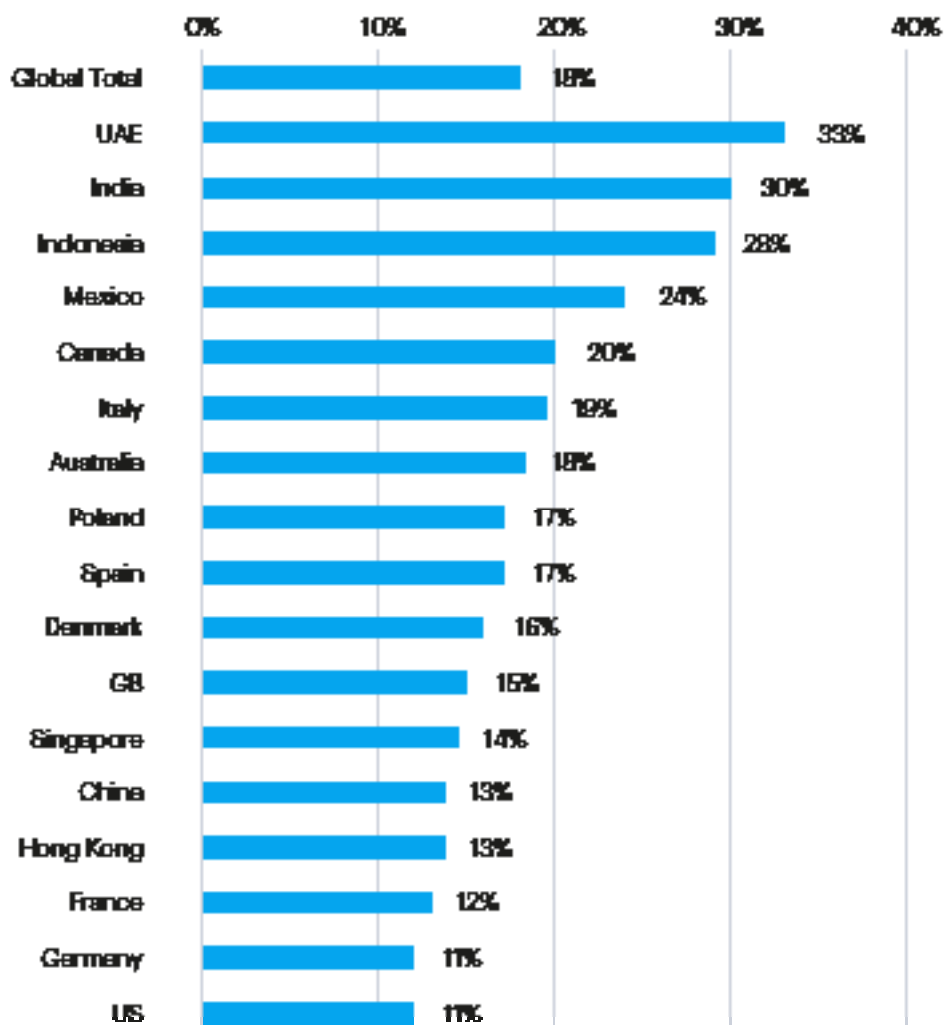
Q: Which of the following, if any, do you use to watch/follow sports?



# The role of social media

Looking at the data by country, UAE, India and Indonesia have the highest penetrations of consumers following sports teams on social media.

## Follow sports teams on social media by country



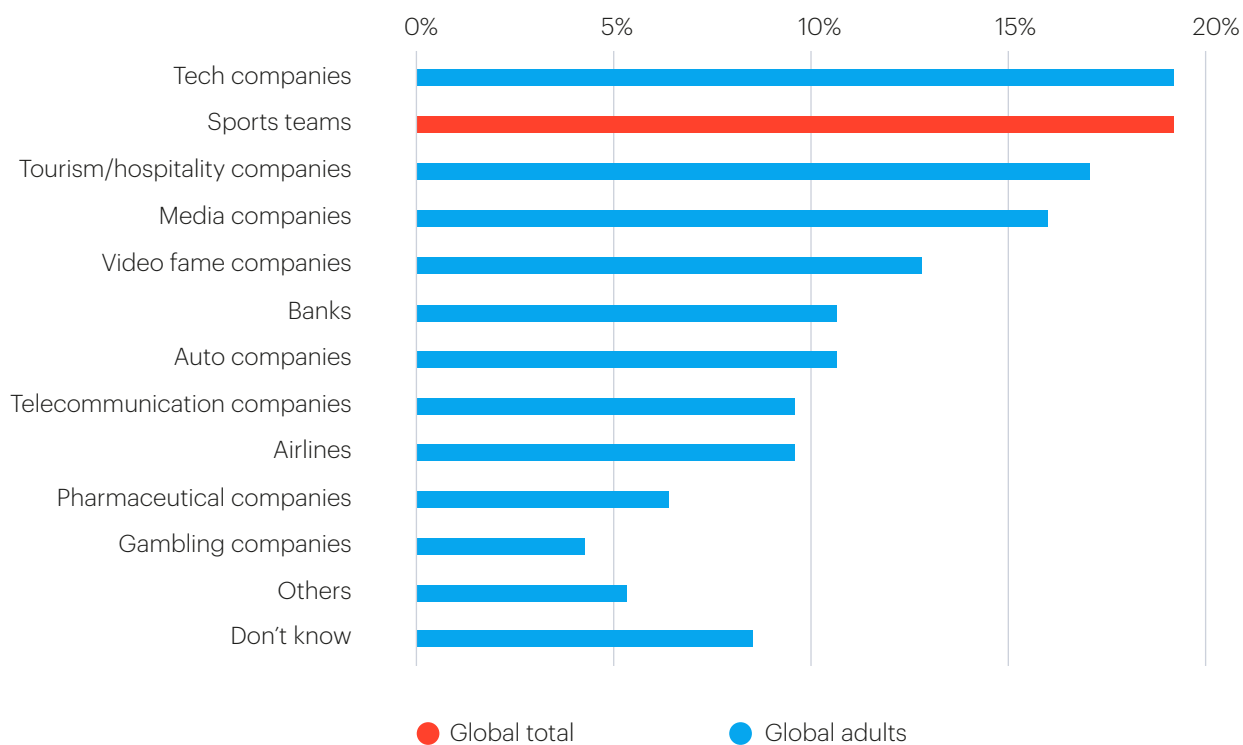
Q. Do you follow sports teams on social media?

Following your favorite sports team on social media not only offers fans the chance to watch sports, but to get real time news, insights, and commentary directly from the team, creating a deeper connection with their fan base. Although globally, consumers are rooting for their favorite sports teams and engaging with them on social media, their preferred sports personalities also play a key role in providing personal insights and opinions, and acting as ambassadors for sports, and creating a positive impact on sports fans.

Social media has changed the way athletes, sports clubs and fans interact with each other, offering a channel to connect fans with their favorite teams and players in real-time. As we have seen earlier, although live TV remains the most popular media to watch/follow sports among global sports fans, social media is the fourth most popular choice, and the third most popular source amongst 18–24-year-olds.

Interestingly, when we look at YouGov Custom Research across 18 international markets, sports teams are the number one preferred type of organization to follow on social media among global consumers, equal with tech companies (both scoring **18%**).

### Companies enjoy following on social media (Global)



Q: Which of the following types of companies do you enjoy following on social media?



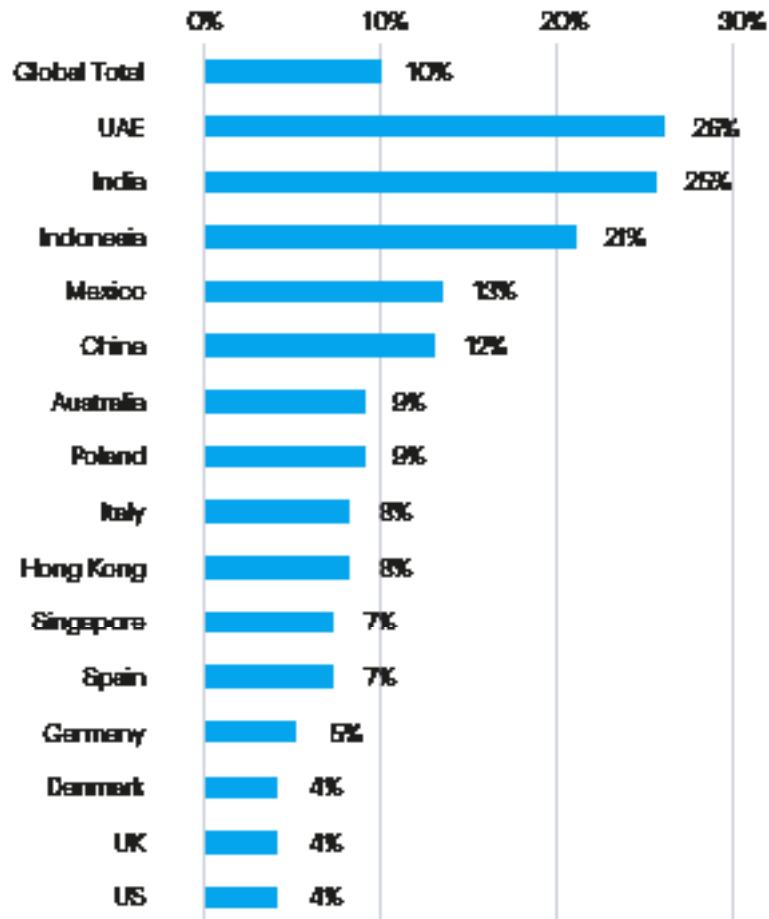




# The power of sports personalities to influence social change

More than four in ten of the global population (**43%**) follow a social media influencer of any type, with one in ten (**10%**) following sports influencers. Looking at the data by country, there are lower levels of following in Denmark, UK and the US, possibly being driven by older populations.

## Sports influencer followers by country



Q: What type of influencers do you follow on social media accounts (e.g., Instagram, Twitter, TikTok, Facebook etc.)

More and more athletes understand they have a social responsibility and can use their image to drive change. With some athletes generating millions of followers, they can provide the reach and the voice to champion change, making them powerful ambassadors along with sports organizations to support the social causes that are important to sports fans across the globe.

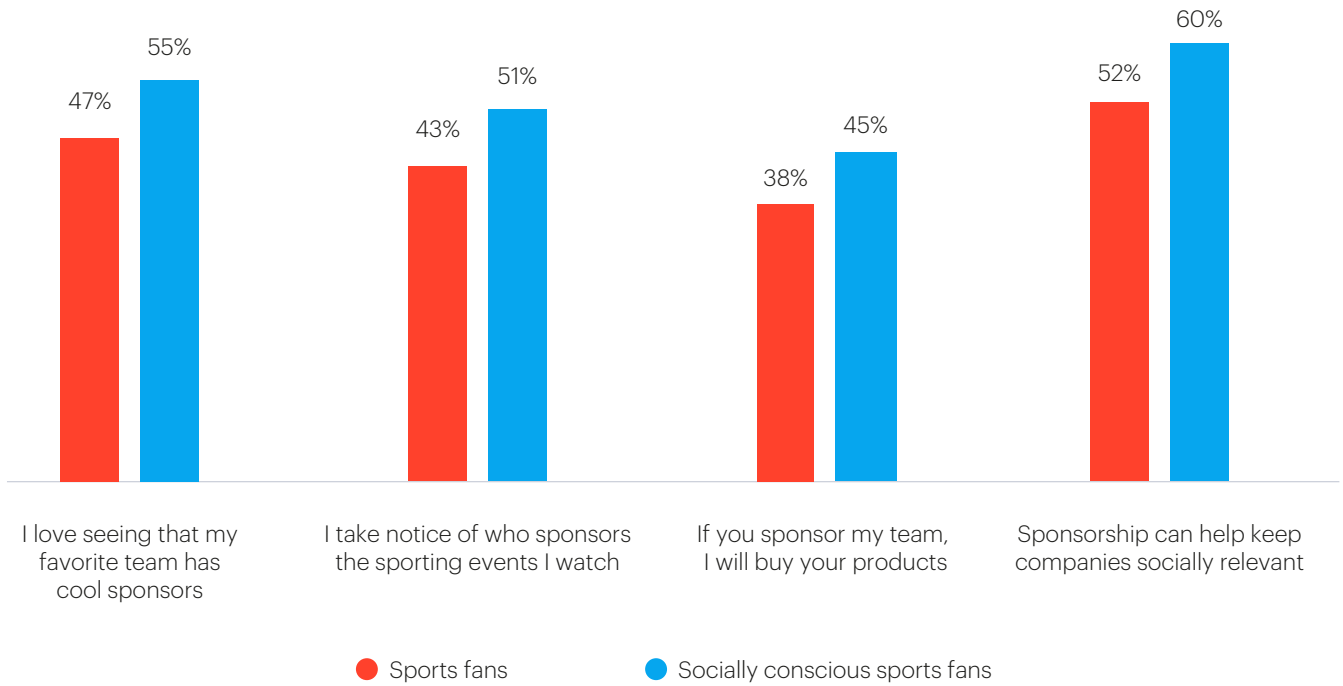
► [EXPLORE MORE DATA](#)

# How socially conscious sports fans engage with sponsorship

YouGov Global Profiles data reveals that socially conscious sports fans are more likely to engage with sponsors of their favorite teams or sports events compared to the global fan base. **43%** of global sports fans agree that 'I take notice of who sponsors the sporting events I watch', increasing to **51%** for socially conscious sports fans.



## Sports fans' attitudes to sponsorship – Net agreement (Global)



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.

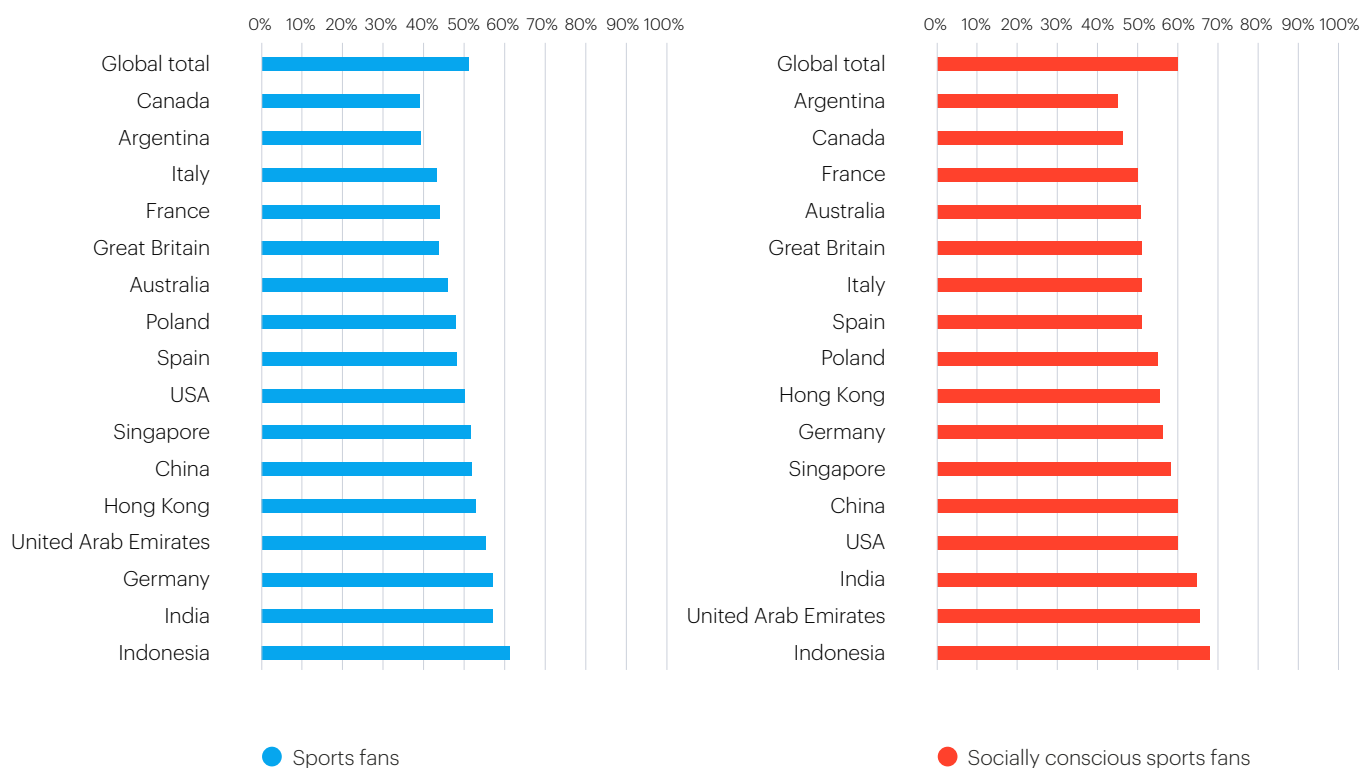
Aligning with the importance of environmental and social values among global sports fans, sponsorship can also be a useful tool to help companies and brands communicate and promote social responsibility. **52%** of global sports fans agree that 'sponsorship can help keep companies socially relevant', and this increases to **60%** among global socially conscious sports fans.





Looking at the data by country, we see an uplift in agreement with the statement: ‘Sponsorship is a way to maintain social relevance’ in all countries when we compare sports fans to socially conscious fans. The countries with the highest proportion of socially conscious fans agreeing include Indonesia (**68%**), UAE (**66%**) and India (**65%**). Sports fans in Canada and Argentina are least likely to agree that sponsorship can help keep companies socially relevant.

### Sports fans: ‘Sponsorship is a way to maintain social relevance’ – Net agreement by country

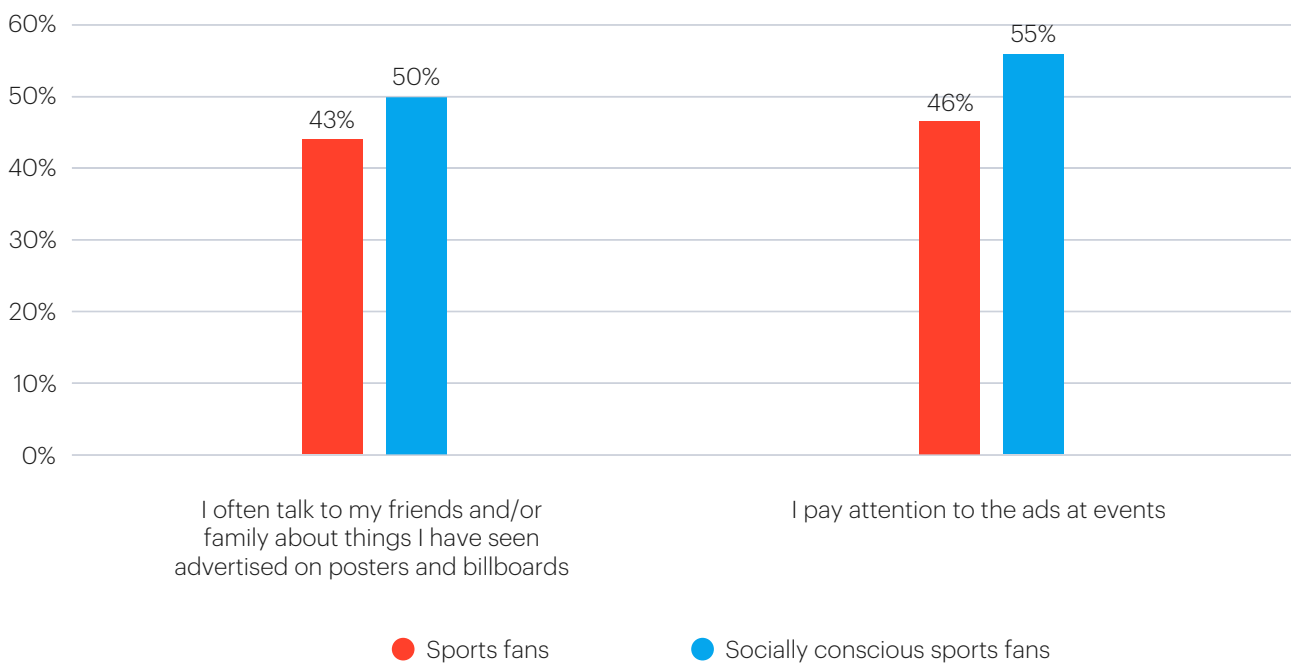


Net agreement with the statement = % ‘Definitely agree’ or ‘Tend to agree’ on a five point scale.

# The power of advertising

Looking at YouGov Global Profiles data, **55%** of socially conscious sports fans say they pay attention to the advertising they see at events, and **50%** of the socially conscious sports fan group say they often engage in conversations with friends and family about the advertising they have seen.

## Sports fans' attitudes to advertising – Net agreement (Global)



Net agreement with the statement = % 'Definitely agree' or 'Tend to agree' on a five point scale.



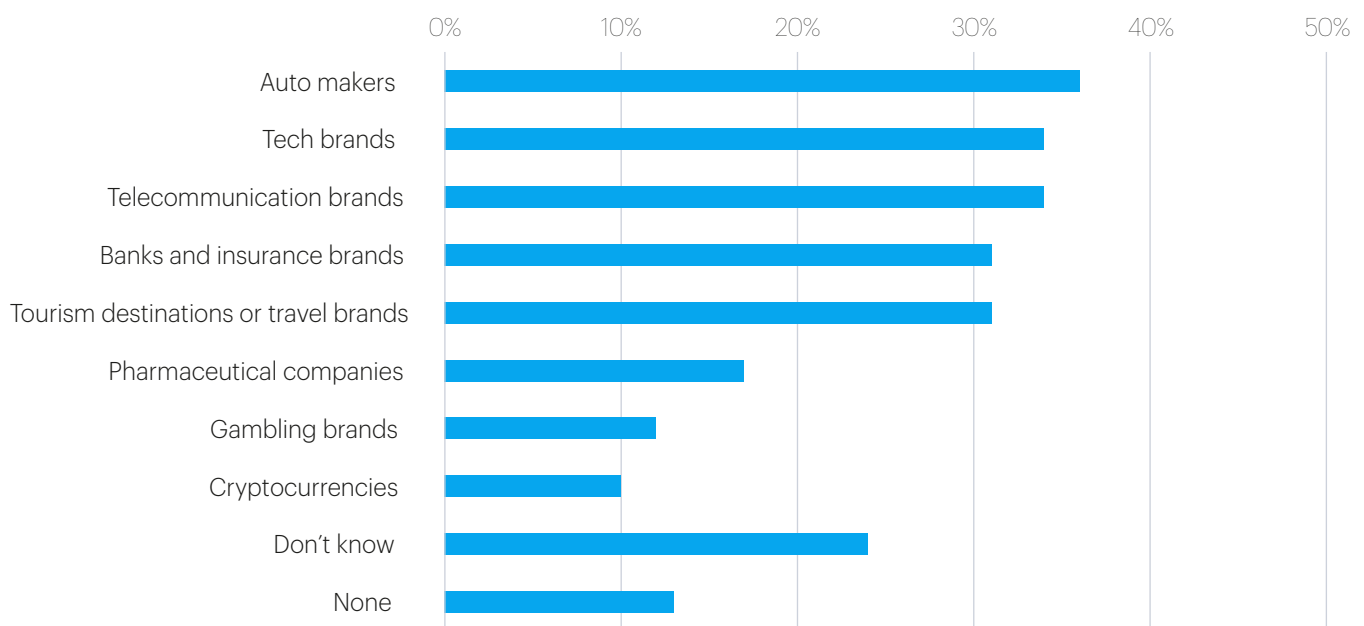


## Which brand categories are best suited for sports sponsorship?

YouGov Custom Research across 18 international markets identified the types of brands that are deemed appropriate sports sponsors. From a list of eight categories, Automotive brand are the most likely to be considered a 'good fit' for sports sponsorship. Over a third of all consumers (**36%**) consider auto brands the most appropriate sponsors of

professional sports clubs, leagues, or athletes. Tech and telecoms brands appeared in joint second position, both with **34%**, and just over three in ten global consumers (**31%**) consider banks and insurance brands and tourism brands to be appropriate sponsors for sports properties.

## Types of brands considered appropriate sponsors of professional sports clubs, leagues or athletes (Global)



Q: Which of the following types of brands do you think make for appropriate sponsors of professional sports clubs, leagues or athletes?

Pharmaceutical brands have a lower synergy with sports sponsorship with only **17%** of global consumers considering them appropriate sports sponsors. Only around one in ten consider either gambling brands, or cryptocurrencies to be appropriate sports sponsors, so the challenge for brands within these sectors is to build awareness and trust among consumers and sports fans that align with their environmental, ethical, and social values.

Given that more than four in ten global sports fans take notice of sporting event sponsors, more than half agree that sponsorship can help keep companies socially relevant, and sports fans are looking for a genuine connection with brands, it is even more important than ever for brand marketers to understand the issues that matter to sports fans to build effective sponsorship partnerships within the sports industry.

# Summary

This paper explores the importance of social issues such as sustainability, equality and representation among sports fans. It is clear that overall the involvement of sports rights holders and athletes in promoting change around social issues is seen in a positive light among sports fans.

This is reflected in the data from the 'No Room for Racism' and 'Inspire Change' campaigns, suggesting the importance for sports marketers looking to consolidate their brands' positive associations to work on social responsibility programmes that can deliver on the promises they make around issues of sustainability, representation, and social justice.

Sports fans expect professional sports people to behave like role models, and they support brands that get involved with social issues, and have a moral message. Among the social issues studied, equal pay in women's sports seems to show the most room for improvement; with the popularity of women's sports growing, it feels organic that issues of equality would come to the forefront. Great opportunity lies here for sports marketers: as new female personalities emerge as role models, supporting them and their efforts towards equality will strongly resonate with socially conscious sports fans.

In terms of reaching the 'socially responsible' global sports fans, they have a greater propensity to consume all types of media than the global total population, they are more engaged in advertising and sponsorship, and more likely to take action as a result of seeing this activity. While live TV is their media of choice for watching/following sports, social media is becoming an increasingly important medium in communicating with the socially conscious sports fans.

At the crossroads of sports and social justice is a great opportunity for marketers to engage with an audience that has increasingly high expectations about sports organizations taking a stance on social issues, and that is strongly committed to both their favorite sports and the social issues discussed.



# Methodology

For this study we connected research from our YouGov syndicated research surveys, including **YouGov Profiles**, **YouGov Global Profiles**, **YouGov Global Fan Profiles**, and **YouGov BrandIndex**, whilst also leveraging a small amount of custom research using **YouGov Direct**.

YouGov Profiles tracks 2 million+ data variables from YouGov's 20 million+ global panel members in 49 markets, covering demographic, psychographic, attitudinal, and behavioral consumer metrics, with data collected daily and updated weekly.

**YouGov Global Profiles** tracks 1,000+ questions in 43 major markets, offering the largest globally consistent audience dataset.

**YouGov Global Fan Profiles** provides an instant view of the size, make-up, attitudes, and behaviors of fan bases in 50+ markets. Identify how big the fan base is, who the fans are, how they consume content and how they align with the thousands of brands and audience trends tracked daily.

**YouGov BrandIndex** measures brand health, from thousands of consumer interviews every day across 54 markets.

**YouGov Direct** covered bespoke sports questions surveyed across 4 markets (Australia, Germany, UK and US) in May 2022, to gain live access to real consumer opinions around women and sport, appropriate supporters of social causes particularly in the area of sports, causes felt positively for sports teams or leagues to actively support and the causes where more could be done.



# ▶ Thank you

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