

SPORTS ADVERTISING AND BRAND EXPERIENCE



Sports advertising is having its moment

It has been a big year for the world of sports advertising. Major tentpole events like [March Madness](#) and the [Super Bowl](#) have remained prime advertising opportunities for marketers. The 2024 Olympics are also shaping up to be an industry blockbuster with US broadcaster [NBCU reporting](#) a record of \$1.2 billion in ad sales. Brands are increasingly turning to sports programming to capitalize on these “lean-in” moments and align their brands with popular social pastimes.

Beyond the usual programming, however, sports advertising has taken on a new tone. Women’s sports leagues are gaining significant traction... and the industry is [responding](#) accordingly. Sportsbooks saw [record revenue](#) in 2023. The rise of CTV – with interactive ads, exclusive sports programming, and targeting innovations – has captured sports advertisers’ attention, with nearly half reporting an [increase](#) in their live sport investments on CTV. The landscape is growing and evolving every day.

The sports advertising opportunity is undeniable. Marketers who understand **how people engage with sports programming and what they expect from advertisers** will win in an increasingly crowded market. Our inaugural report offers the insights needed to get ahead of the game, including:

- Who the sports advertising audience is
- Top devices, platforms, and bundles for sports viewing
- Perceptions of and preferences for ads during sports programming
- Preferred ad formats for sports viewers

METHODOLOGY

DISQO surveyed 2,810 US sports viewers (18+) from our first-party audience, between June 11–18, 2024. More than 2.3 million people have opted in to share their brand experiences with DISQO, empowering clients to cultivate deep insights about their target audiences and to perform objective, single-source measurement of advertising effectiveness on attitudes and digital behaviors.



Defining next gen sports fans

Nearly [155 million people](#) watch live sports in the US. To help marketers understand the biggest fans of sports programming, we outline the demographic breakdown of frequent sports viewers: Adults (18+) who reported watching sports at least weekly (n=1777).



Gender disparities aren't as significant as you may expect

Sports have long been considered a boys club, but it's safe to say that marketers can also reach a significant portion of women through sports investments. Looking beyond traditional segmentation will position brands for long-term growth, especially as the industry leans on women's leagues for untapped markets.



Sports advertising is a multi-generational opportunity

There's good engagement across all age groups, but Millennials and Gen Xers are most engaged. This points to sports' unique ability to captivate diverse audiences. As more sports programming shifts to digital, we will likely see growth among younger audiences.



Lower- and middle-income consumers are fully tuned in

Only one-fifth of upper income sports viewers (greater than \$125k) reported regular sports viewing. By focusing on the highly engaged lower- and middle-income groups, while also creating opportunities to attract and retain upper-income viewers, marketers and media platforms can optimize campaigns for maximum impact.



*Values 2% and below are not noted in the chart

How people watch

Sports viewing has traditionally been relegated to linear television. But, as the world turned to multiple devices, channels, and services, so too did the way people watch sports. Cross-channel campaigns and measurement, including social media, are now table stakes.

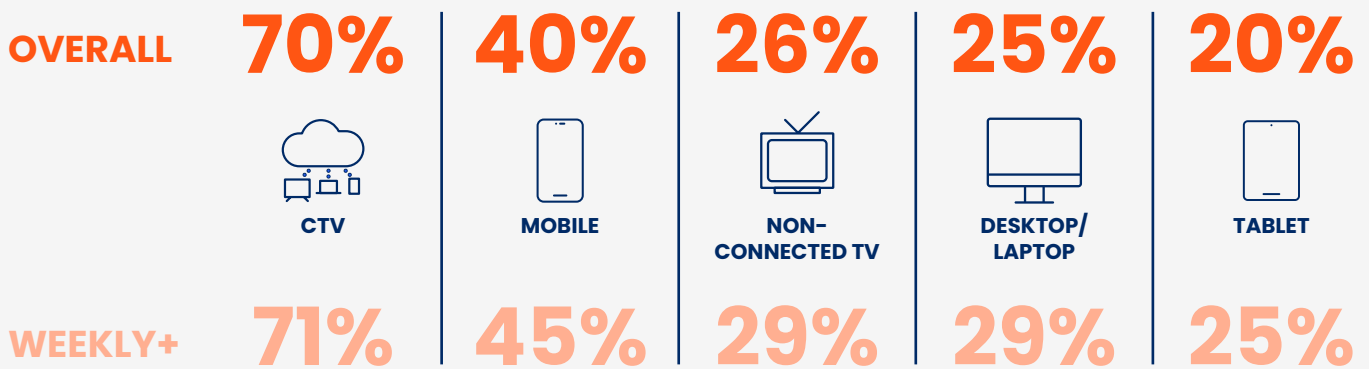
Here, we examine through which devices consumers consume sports programming today, so that marketers can meet them where it matters most.

WE ASKED

On which device(s) do you watch sports programming?



Sports viewers



CTVs dominate sports viewership, surpassing non-connected TVs by nearly three times. Mobile also holds a significant share of sports viewership, as streaming apps have made it easier than ever to view content from anywhere. Mobile viewing also rises among frequent sports viewers, who are more likely to closely follow games on the go or outside of the home.

Cross-channel campaigns and measurement, including social media, are now table stakes.



Where people watch

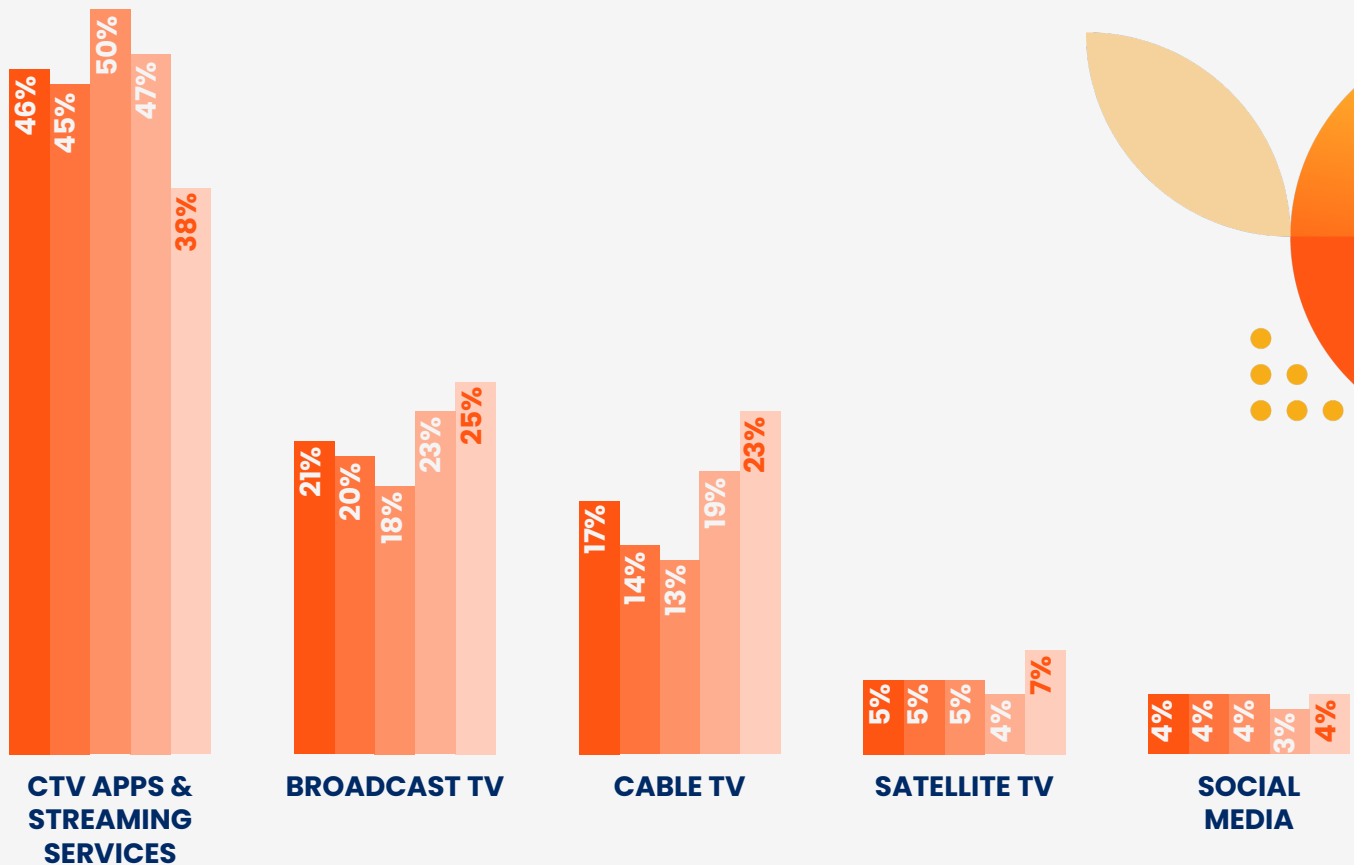
We also looked at viewers' preferred platforms for watching sports. CTV apps and streaming services rank as the top for sports viewing, but non-connected options still hold a sizable portion. Social media apps have a long way to go before they are trusted as a preferred viewing platform for sports.

WE ASKED

Through which platform do you prefer to watch sports programming?



- OVERALL
- GEN Z
- MILLENNIALS
- GEN X
- BOOMERS



Older consumers are significantly more likely to look to non-connected options than younger generations. Given that the biggest sports fans are Millennials and Gen Xers, marketers should allocate their ad spend accordingly between both connected and non-connected TV to reach both cohorts.

Reticence for too much change

While the evolution of sports advertising has empowered media platforms and advertisers to engage with consumers in new ways and through multiple channels, too much change can be frustrating for viewers. People want easy access to their preferred sports content... and they want brands to meet them where they are.

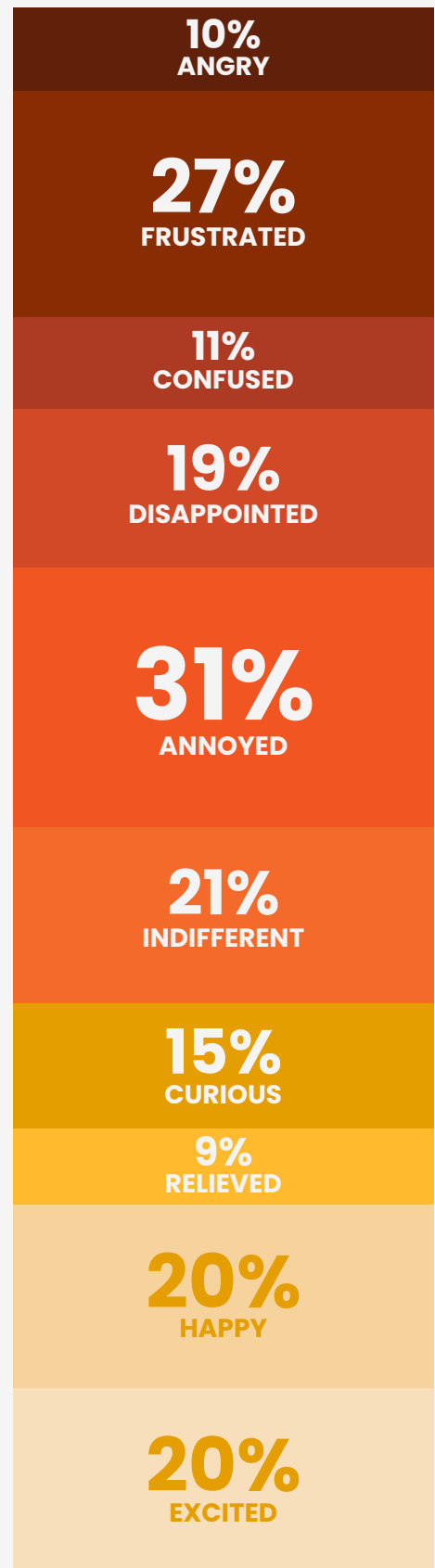
Here, we gauge how people feel about distribution changes for their preferred sports leagues to help programmers innovate with an eye toward the viewing experience.

WE ASKED

When your favorite sports league changes networks and/or distribution platforms, how does that make you feel?



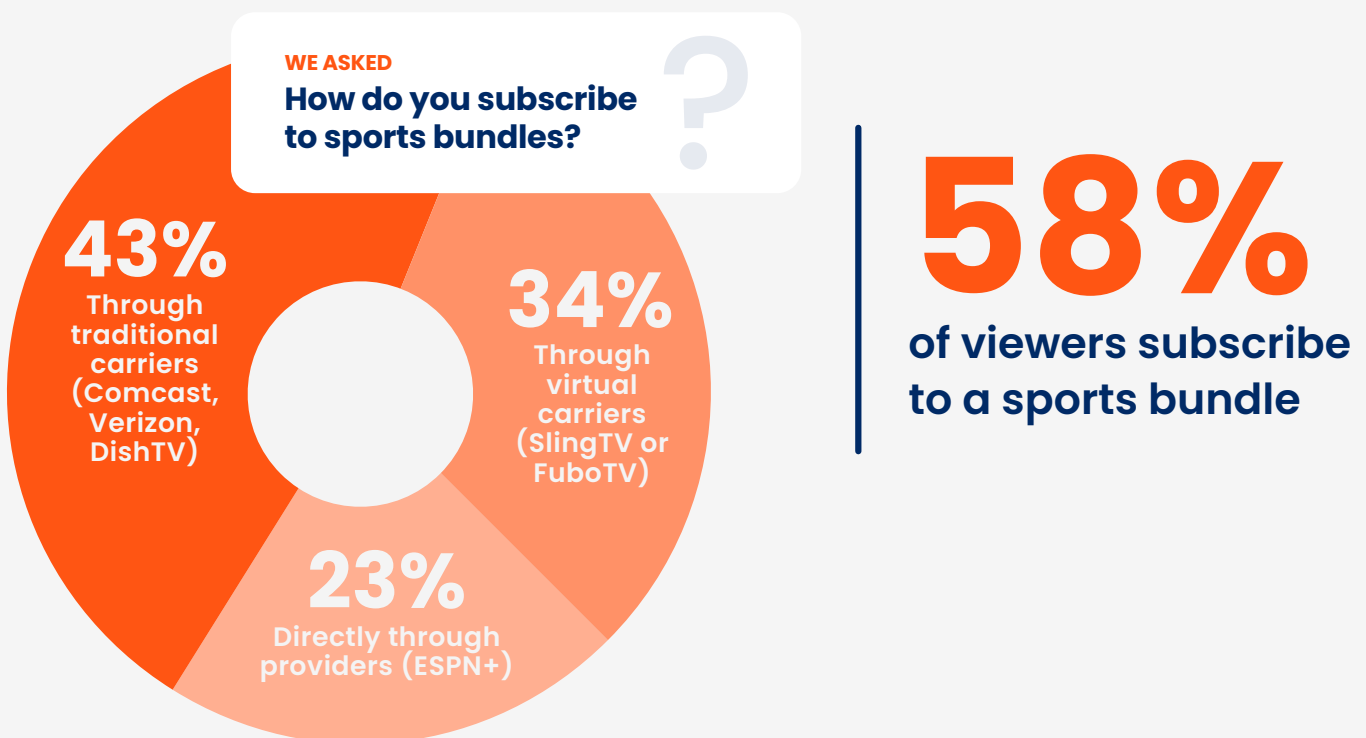
More people have negative sentiment about changes for their preferred sports programming than positive sentiment. Frustration and annoyance are the two most common feelings, likely because a change in distribution often requires new subscriptions. While innovation is beneficial, media owners should be mindful of how programming changes will factor into consumer perceptions and behaviors to avoid creating friction with their audience.



Bundles are thriving

Our [Ad-Supported Streaming report](#) found that bundles are making a comeback across the streaming landscape. In the world of sports, this is also true with over half of all respondents reporting a sports bundle subscription.

Media owners continue to introduce a growing number of sports-specific bundles. ESPN, Fox, and Warner Bros. Discovery – three of the most influential sports broadcasters in the US – have [announced plans](#) to launch a joint sports streaming service, Venu Sports, this year. This partnership will surely create ripples across the sports ecosystem.



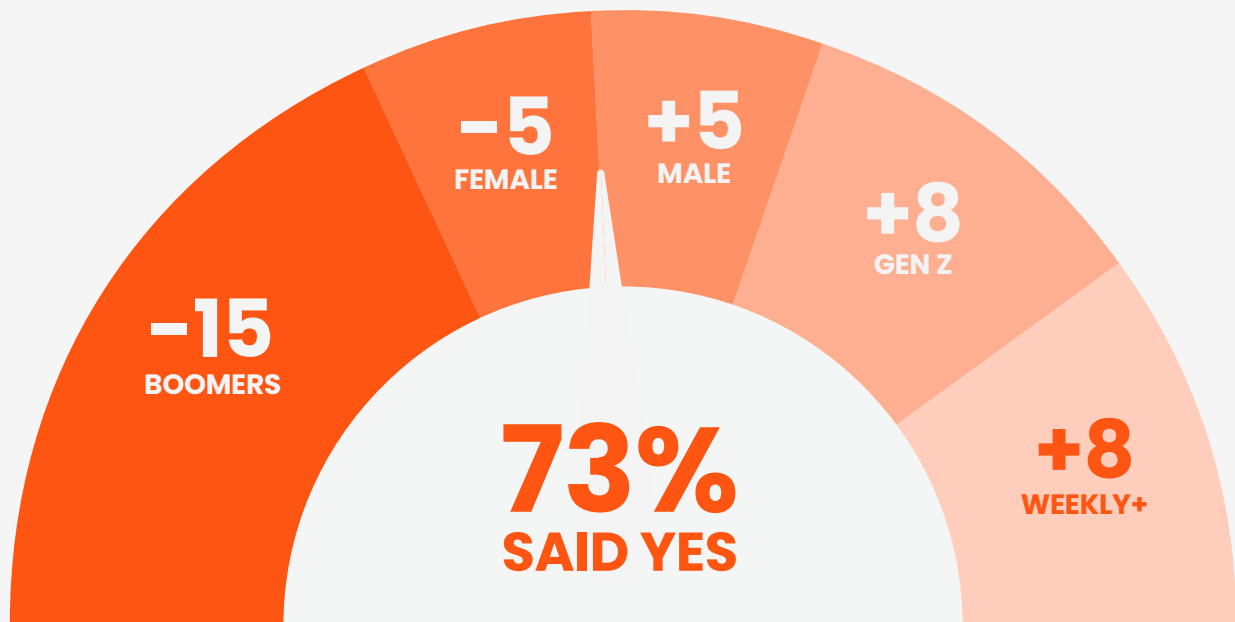
Among those who subscribe to sports bundles, traditional carriers are most popular, followed by virtual carriers. This stands in contrast to our general ad-supported streaming findings, where consumers said they preferred smaller bundles like ESPN+ and Disney+. Marketers should take note of these differences to best cater to the sports audience. While streaming has emerged as the next big thing in TV (and there's no question that its influence is massive), there is some work to be done to provide the value that sports fans seek.

A spotlight on sports streaming

Streaming bundles may not be it... but streaming overall still dominates sports viewing - especially as CTV devices continue to raise the bar for on-device capabilities. Here, we shine a spotlight on consumer preferences for sports streaming.

WE ASKED

Are you likely to subscribe to a new streaming service so you can watch your favorite sports programming?



Almost two-thirds of sports viewers said they would subscribe to a streaming service to access to their favorite sports programming. This rises significantly among frequent sports viewers, Gen Z, and males. Gen Z's enthusiasm for sports streaming is worth noting, given that they did not report as much engagement as other generations. Marketers looking to reach this influential demographic through sports advertising should look to streaming as a prime channel.



Taking home the streaming gold

To dig deeper into sports fandom and streaming, we look to 2024's biggest sporting event: the Paris Olympics. Three-quarters of sports viewers said they definitely plan to watch the games and another eleven percent (11%) said they were unsure.

Are people excited enough about the Olympics to subscribe to a new streaming service specifically to view that content? The short answer is yes. Below we explore nuances across key demographics.

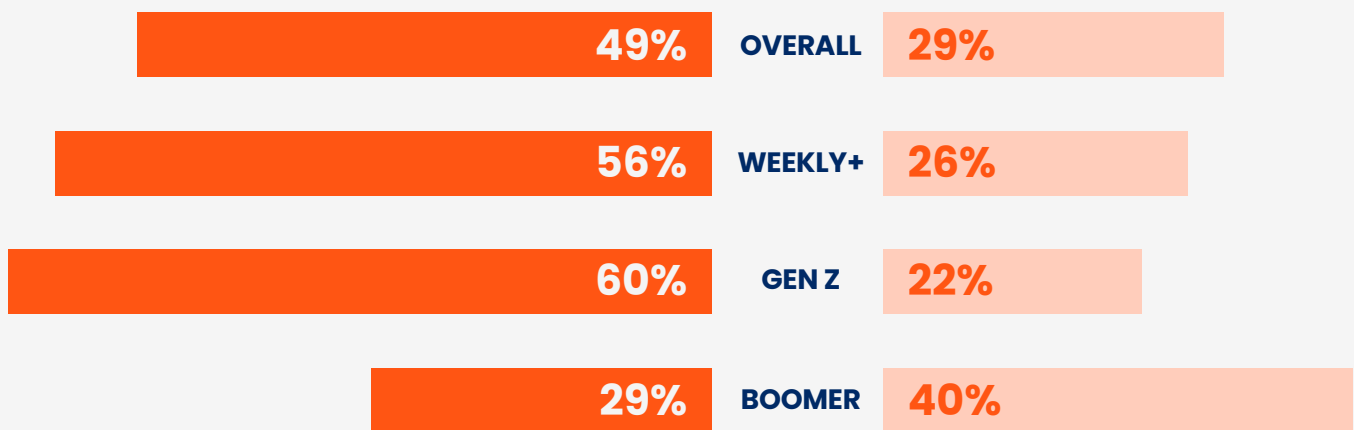
WE ASKED

Do you plan to subscribe to Peacock to access Olympic programming?



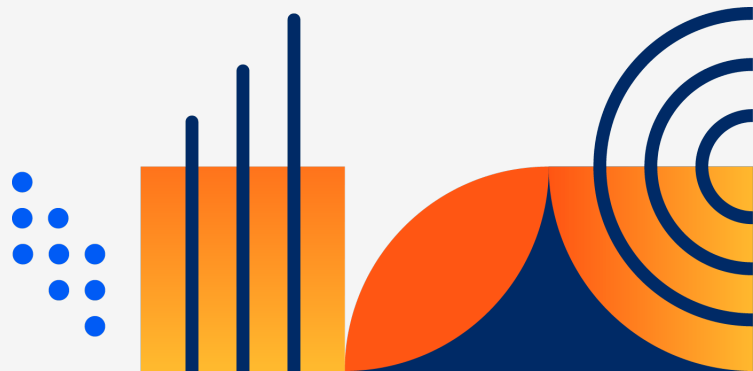
● YES

● NO



Among those who plan to watch the Olympics and don't already have a Peacock subscription, half said they planned to purchase a subscription simply to watch the Olympics. If you deliver added value in streaming, consumers are willing to pay. Gen Z is the cohort that is most likely to purchase a subscription specifically to watch the Olympics, which further underscores their preference for viewing sports through streaming channels.

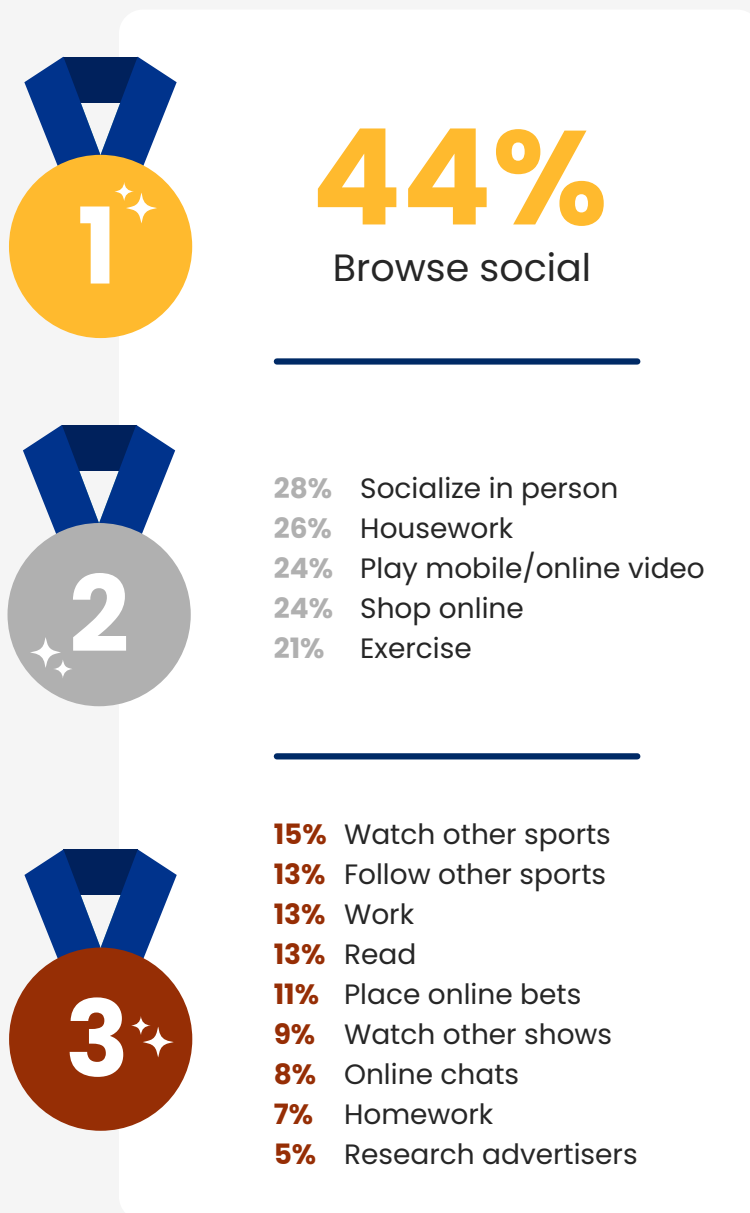
Consumers are willing to pay more for added value in streaming



Viewer attention is divided

We know that people are consuming sports programming on multiple devices, but they're also using second screens and mobile devices to multitask. Eighty-eight percent (88%) of people reported that they engage with other activities while watching sports.

Below, we outline which activities people said are most popular during sports viewing so that marketers can create experiences for multitaskers and capitalize on possible cross-channel synergies.



Browsing social media is by far the most popular activity, whether to engage in online discussion about the sport or to simply browse content. Socializing, housework, playing games, online shopping, and exercise are not too far behind.

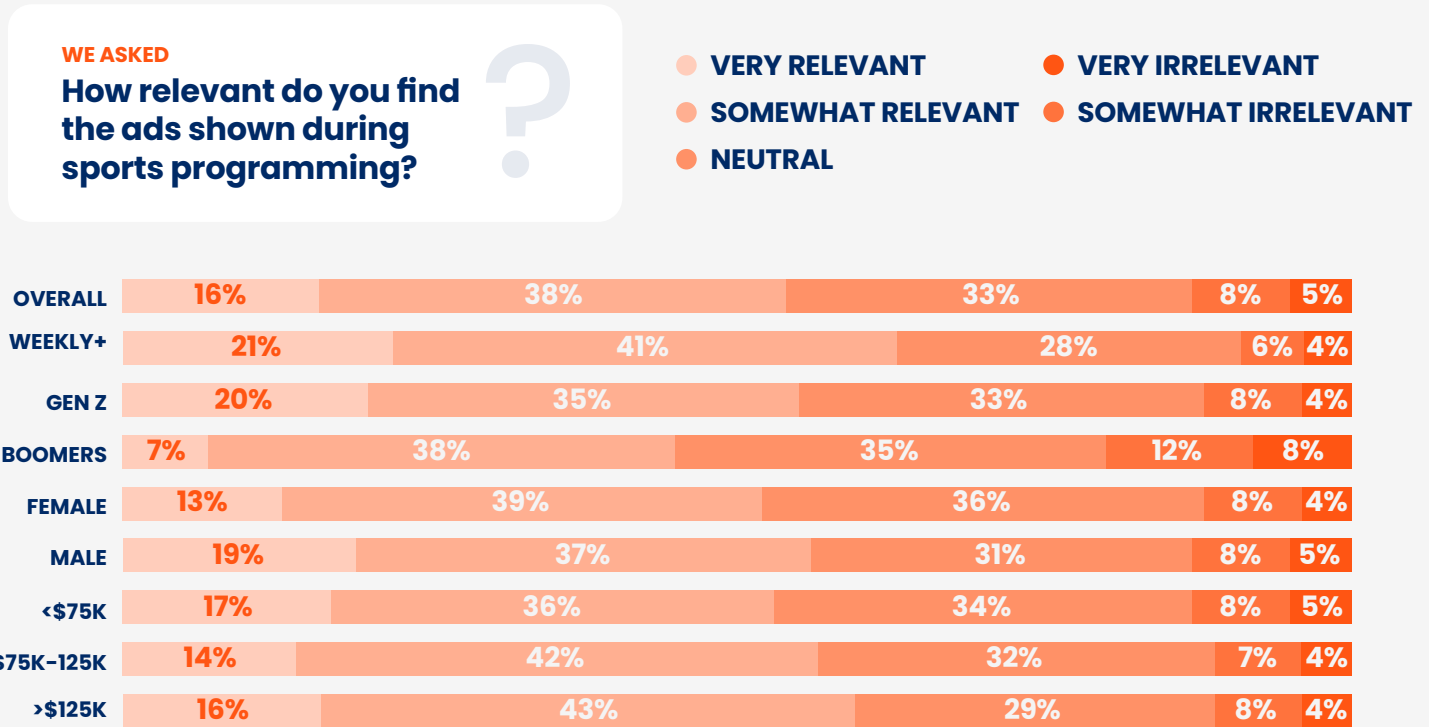
As a whole, marketers need to be cognizant that people will not necessarily be paying full attention to a game and, as a result, the ads playing during programming. They should acknowledge these behaviors and deliver engagement tactics (i.e. shoppable ads, advergames, etc.) that draw people to the primary screen and also consider cross-platform campaigns that target multi-tasking consumers across other screens.

88%

multitask while watching sports

The state of ad relevance

Now that we've set the stage for sports programming consumption, let's gauge what they think about the ads. Ad relevance is an important contributor to brand perceptions and conversions. Innovations in targeting have enabled deeper personalization.



Overall, marketers are delivering relevant content, especially to sports enthusiasts. Only 13% of respondents said they found ads shown during sports programming irrelevant. Frequent sports viewers were most likely to say ads were “very relevant.”

More people agree than disagree (+31) that ads during sports events should relate directly to the sport itself. One-third are neutral. Overall, brands have more to gain from developing ad content that acknowledges the viewers' preferred sport.



Balancing ad loads with experience

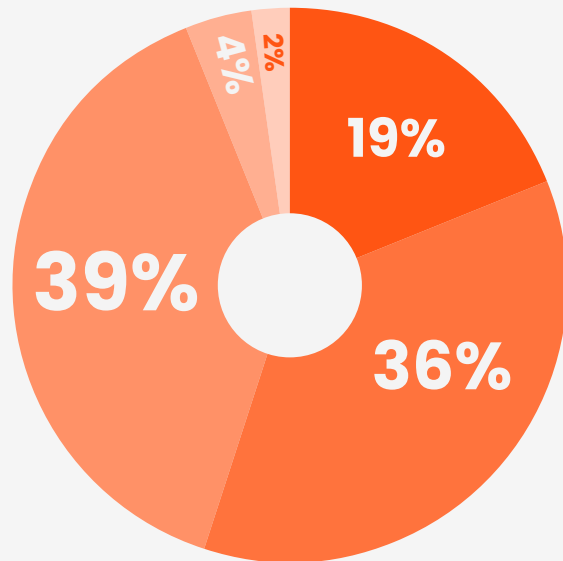
No matter the channel, consumer viewing experiences should be a top priority. There's nothing more irritating during sports programming than inopportune interruptions or heavy ad loads that cut into game time. With the rise of CTV, ad loads have been a particularly hot topic. Now more than ever, sports advertisers and media partners need to balance effective delivery with the viewing experience.

WE ASKED

How do you feel about the amount of ads in sports programming?



- **TOO MANY**
- **A LITTLE TOO MANY**
- **IT'S JUST RIGHT**
- **A FEW MORE**
- **A LOT MORE**



Nearly half of all sports viewers (45%) said that current ad loads are just right or that they would be receptive to more. There is not much room for media platforms to introduce heavier ad loads without negatively impacting the experience, but it's encouraging that [increased streaming ad loads](#) aren't deterring sports viewers.

However, it's a fine line to balance. Another half of respondents said there are too many ads. Only a fifth said there are "way too many," so some slight adjustments could effectively address these concerns and sway more people toward the "just right" sweet spot.

Subscription pricing is also important to consider. When asked how people feel about ad loads in relation to subscription pricing, 18% said they would accept more ads if it meant lower pricing or free access, while 31% said they would pay more to reduce the number of ads during programming. The rest (51%) said they felt ad loads were appropriate for the cost.

The bottom line? People have different preferences, so providing different value exchanges is key in winning the battle for subscribers.



Sports ads drive brand favorability

We established that sports programming attracts a broad audience, making it a prime opportunity for brand building. In our [Consumer Trends 2024 report](#), 61% of consumers said that the specific experiences they have with brands are top perception drivers. Let's dig into how specific sports advertising experiences impact brand perceptions.

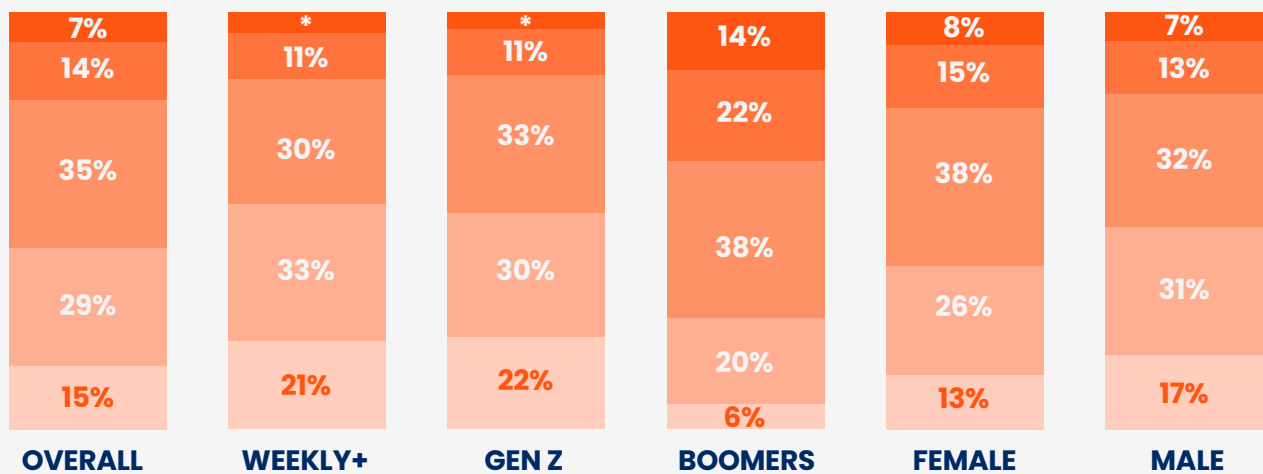
WE ASKED

How much do you agree with the statement: "I place more value on brands that advertise on sports programming I like"?



**Values 5% and below are not noted in the chart*

- **STRONGLY DISAGREE**
- **DISAGREE**
- **NEUTRAL**
- **AGREE**
- **STRONGLY AGREE**



Nearly half of all sports viewers (44%) said they place more value on brands that advertise during sports programming. This rises to more than half among frequent viewers and Gen Zers. Males are not far behind either. Advertisers can expect to see greater campaign impacts with these cohorts. Boomers are most skeptical, but a large portion also said they felt "neutral." This suggests that there is room to sway them over to favorability with the right experiences.



New opportunities for driving outcomes

Now that sports viewing has shifted to multiple devices and channels, there are more avenues for ushering people further down the marketing funnel toward sales. In this section, we take a look at how sports advertising influences purchase intent.

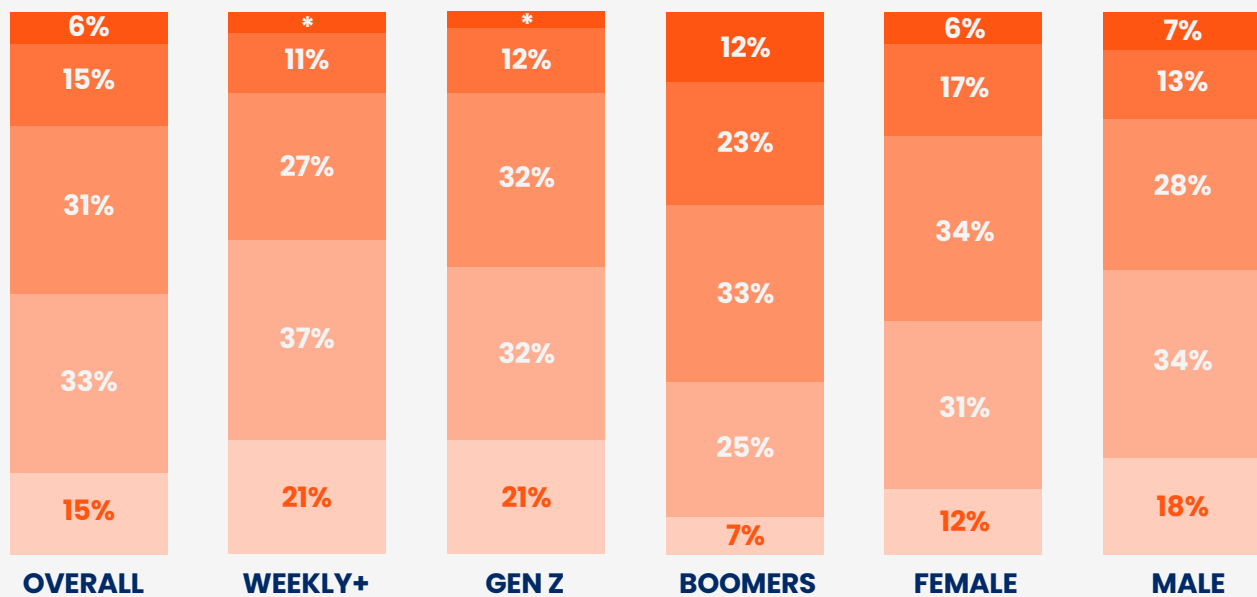
WE ASKED

How much do you agree with the statement: "I am more likely to consider purchasing brands that advertise on sports programming I like"?



**Values 5% and below are not noted in the chart*

- STRONGLY DISAGREE
- DISAGREE
- NEUTRAL
- AGREE
- STRONGLY AGREE



Again, nearly half of sports viewers (48%) said they are more likely to consider purchasing from brands that advertise during programming they like. Across all cohorts, we see a slight increase in purchase intent over brand favorability, which we covered on the previous page. This is an encouraging sign for marketers and media platforms alike, as sports advertising is proving to be a full-funnel marketing opportunity.



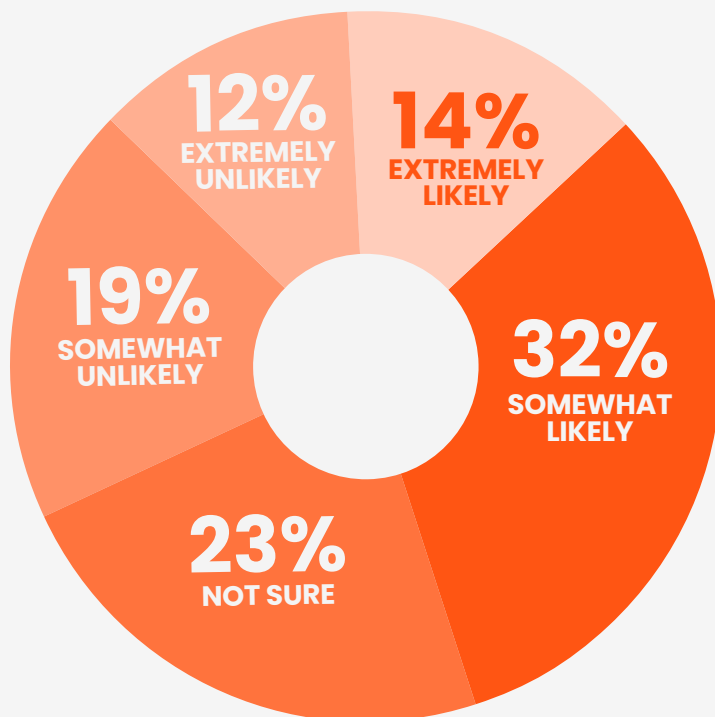
Interactive ads are a growing opportunity

During this year's Super Bowl, Paramount+ introduced a range of [new engagement tactics for advertisers](#) to encourage viewers to take action with their brand, such as interactive overlays and QR codes. Disney+ just [recently announced](#) the launch of "advergames" and shoppable ads across its inventory, including sports. So, we wanted to understand how likely people are to try out these features.

Nearly half (46%) said they are likely to engage and 23% are not sure yet. By offering engaging and relevant CTAs, advertisers can move viewers through the funnel in ways that weren't possible before.

WE ASKED

How likely are you to engage with interactive ads such as QR codes, shoppable ads, or real-time polls?



46%

would engage with interactive ads

23%

could be swayed



Winning ad formats

Not every sports ad is created equal, so we asked sports viewers to select which ad formats they believe offer the best experience for people watching sports programming. While we found on the previous page that people are willing to engage with new and innovative ad formats, tried-and-true traditional ads are overwhelmingly the favorite.

A third of sports viewers also chose branded or sponsored segments, such as halftime shows or “Player of the Game,” likely because they fit seamlessly into the viewing experience and offer additional entertainment. Contests and giveaways were not far behind either, offering added value to viewers beyond one-sided content.

WE ASKED

What types of ads offer the best experience for the sports viewer?



Takeaways for sports media and advertisers

1 Capitalize on the cross-media opportunity

With sports viewers engaging with multiple screens, channels, and platforms, advertisers and media owners have an opportunity to reach and resonate with them at many touchpoints. Innovations in targeting allow advertisers to tap into cross-media synergies and reach audiences beyond gameplay. Single-source, cross-channel measurement is crucial for sports advertising campaigns, revealing how different touchpoints work together to create brand lift and move audiences to action.

2 Balance effective delivery with the viewing experience

People are receptive to ads during sports programming but they value their viewing experience. They want easy access to their favorite content and expect brands to meet them where they are. Media owners should be mindful of distribution shifts, ad loads, and frequency. Advertisers should consider ad relevance and formats that fit seamlessly into the programming. Keeping consumer preferences at the center of every decision will increase receptivity to sports advertising and more positively influence brand perceptions.

3 Optimize for full-funnel benefits

Sports programming is growing as a “lean-in” experience, as viewing moves beyond linear TV and marketers leverage new engagement tactics to hold viewer attention. Sports advertising is no longer just a brand-building opportunity; marketers can now tap into innovations to usher sports viewers down the funnel toward actions, such as site visits and e-commerce activity. Down-funnel activations are still relatively new, so marketers should approach these opportunities with a test-and-learn mentality to understand what works best for their audience.

4 Find an objective measurement partner to maximize ROI

The sports advertising space is poised for continued growth and evolution. This is both an opportunity and a challenge for marketers. While they can test new ways to resonate with sports enthusiasts, they must also keep a close pulse on campaign performance to keep pace with changes in the space. Marketers should look to an objective, cross-platform measurement partner to prove the value of their investments and optimize campaigns for maximum impact.

Advertising Measurement

WITH  **DISQO**

BRAND LIFT & OUTCOMES LIFT

DISQO provides holistic ad measurement with a single-source, identity-based methodology. Our Brand Lift product enables cross-platform measurement of attitudinal lift on KPIs like awareness, consideration, and favorability. Our Outcomes Lift product uniquely adds measurement of post-ad exposure digital behaviors like search, site visits, and e-commerce activities. Combined, these products give a complete picture of full-funnel advertising effectiveness - even on siloed social media platforms.

Our first-party audience of over 2 million consumers opts in to share their brand and advertising experiences across platforms and devices, allowing DISQO to precisely link ad exposure to individuals. Clients can easily see how their sports campaigns compare to other platforms and channels, without cookies.



BRANDS & AGENCIES

At a time when media spend is under scrutiny, DISQO reveals exactly how advertising drives tangible business outcomes and, importantly, which channels are moving the needle most. This allows you to prove the effectiveness of investments and make valuable ROI optimizations.



MEDIA PLATFORMS

Media platforms today need to prove how their content delivers against campaign goals. DISQO offers measurement of consumer actions post-ad exposure once the consumer leaves your domain. This enables powerful conclusions about performance and enables you to get proper attribution for the efficacy of your media and ad formats.



REPORT

Measure your sports advertising campaigns with DISQO!

 hello@disqo.com

 @disqo

 @godisqo

