



# FANARCHY 26

HOW TO UNLOCK THE POTENTIAL OF THE WORLD'S MOST PROMISING SOCCER MARKET

A collage of various people, including a woman with curly hair and glasses, a man with a beard and sunglasses, a man shouting with his mouth wide open, and a woman shouting. The entire image is overlaid with a blue tint. In the center, there is a graphic of an eagle with its wings spread, perched on a banner. The text "ALL IMAGES FROM THIS REPORT HAVE BEEN GENERATED WITH ARTIFICIAL INTELLIGENCE" is written in white, bold, uppercase letters across the middle of the image.

**ALL IMAGES FROM THIS REPORT HAVE BEEN  
GENERATED WITH ARTIFICIAL INTELLIGENCE**



FAVORITE

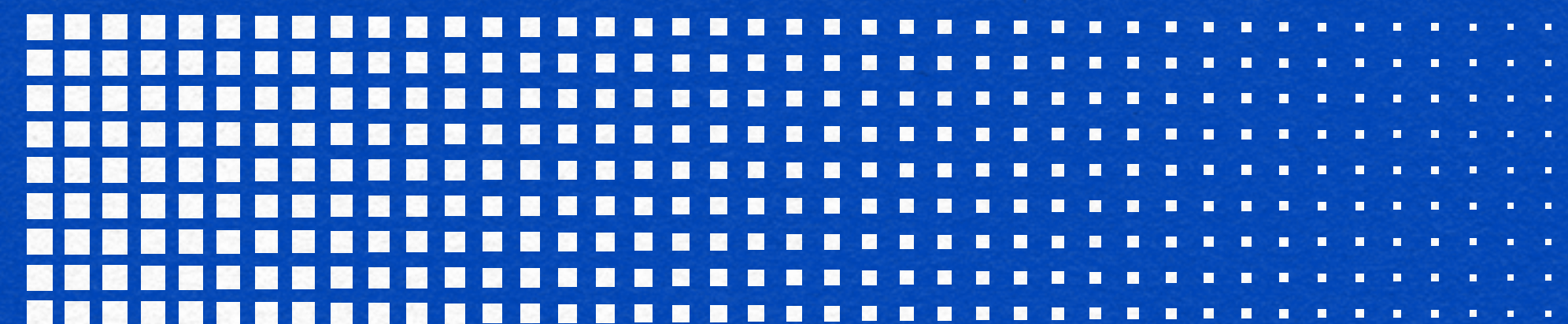
# TABLE OF CONTENTS

<b>Introduction</b>	<b>4</b>
<b>Methods</b>	<b>8</b>
<b>Part I: The Most Promising Market in the World</b>	<b>9</b>
<b>Part II: Who Are US-Based Soccer Fans?</b>	<b>23</b>
Persona 1 - The National Fan	27
Persona 2 - The Player	28
Persona 3 - The Pop Culture Fan	29
Persona 4 - The Parent	30
Persona 5 - The Gamer	31
<b>Part III: The Impact and Opportunities of the Womens Game</b>	<b>34</b>
<b>Part IV: Preparing for the Future</b>	<b>41</b>

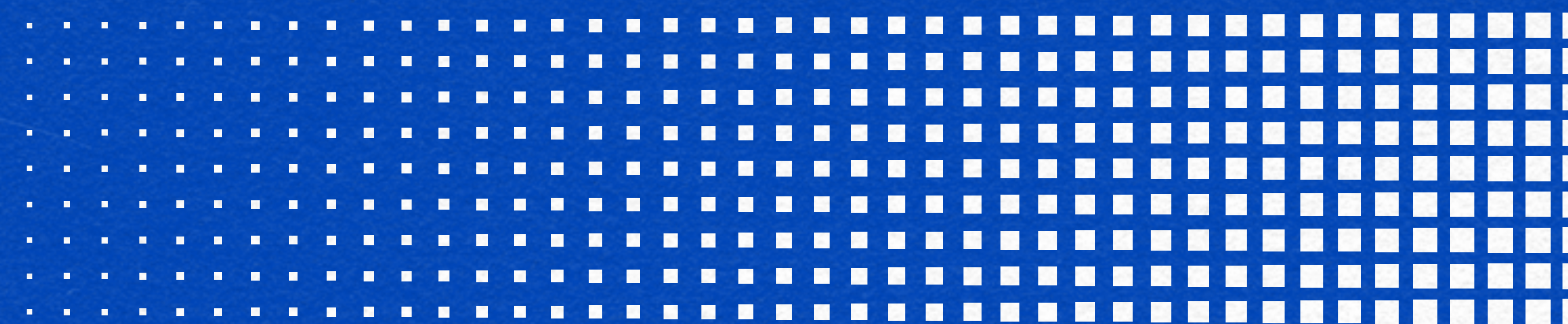
# 331 MILLION HEARTS

The opening sequence of *Todos os Corações do Mundo* (*All the Hearts of the World*), the official documentary of the 1994 FIFA World Cup USA™, paints a bleak picture of soccer in the United States. The film opens with a series of interviews with Americans sharing what they know about soccer. A food service worker in an apron and snapback trucker hat, when asked about the tournament replies, “I’m sorry, I don’t know anything about it. When you are out in the desert, all you think about is the heat and how to survive.” At one point, a man in a hoodie says, “The Americans need scoring. If it’s too low-scoring a game, it’s too boring for American audiences.”<sup>1</sup>

While undoubtedly leaning into stereotypes, it’s profoundly telling that the official documentary about one of the most impactful moments for soccer in the United States begins with a long filmic joke about how little Americans know or care about the world’s game. This is what the world thought—and perhaps still thinks—of the United States and American fans.



**But we’ve come a long way since 1994.  
Soccer fandom in the United States is growing.  
It’s unique, and messy, but it’s full of opportunity.  
IT’S FANARCHY.**



The 1994 FIFA World Cup USA is largely credited with creating a great “first wave” of soccer fandom in the United States. Major League Soccer, currently the highest-grossing division of men’s soccer in the United States, was launched in 1993 as part of a deal with FIFA that earned the Americans the rights to host the World Cup. Over a decade later, a competing men’s pyramid (the United Soccer League) was launched in 2010, bringing professional men’s soccer to even more cities.

Five years after ‘94, the 1999 Women’s World Cup was also hosted in the United States, and the United States Women’s National Team became an undisputed global juggernaut, winning a total of four World Cup Championships, four Olympic gold medals, and nine CONCACAF Championships. Most recently, the National Women’s Soccer League (NWSL) has exploded in popularity, announcing three new expansion teams in the next five years.

At the same time, the evolution of media distribution has resulted in unprecedented access to global soccer in the United States. Gone are the days of needing a satellite dish, or a local bar with one, to watch any of the major foreign soccer leagues. Today there are hundreds of domestic league matches from around the world that are streamed via OTT across the United States every weekend.

Yet despite all this growth, mainstream interest for soccer throughout the United States still lags behind most other nations. Only a quarter of United States sports fans (83M) show an interest in soccer, compared to nearly half of the rest of the world. Soccer lags far behind American football, basketball, and baseball in popularity, and only barely edges out hockey, tennis, or golf.<sup>2</sup> While the final of FIFA World Cup Qatar 2022™ did break viewership records in the United States, the regular season NFL games from that same weekend still reached larger audiences.<sup>3</sup>

Even amidst all the growth in popularity since 1994, there’s still tremendous opportunity to unlock soccer fandom in the United States. The second wave of popularity in the sport is coming, and it will accompany the return of global soccer tournaments to North American shores: the 2024 Copa America, the 2026 FIFA World Cup, and the 2028 Summer Olympics. There is a growing consensus that the next decade will be the biggest yet for soccer in the United States—and yet, nobody really knows what that growth will look like.

It is in this context that we offer this report on soccer fandom in the United States. Sports Innovation Lab and Jung von Matt share a deep and abiding passion for soccer (fútbol, futebol, Fußball, 足球, etc.) that motivates and sustains this work, and it is our joint belief that the United States is the world’s most promising soccer market.



# UNLOCKING THE USA SOCCER MARKET



# METHODS

To develop clear and comprehensive insights, Sports Innovation Lab and Jung von Matt SPORTS employed a mixed-methods research approach, incorporating both quantitative and qualitative methods. Research and analysis were conducted from October 2022 to March 2023. Methods included:

## **Survey**

Two separate, but methodologically-related mobile survey panels were conducted of exclusively US-Based respondents. One survey polled English-speaking, self-identifying soccer fans from across the United States (n=1000), while a second, Spanish-language survey was deployed to adequately capture native Spanish speakers as a critical population in this study (n=500). A current US Census data estimate of the native Spanish-speaking population in the United States (13.2%) was used to apply appropriate weighting to the combined results <sup>4</sup>.

## **Transactional Data**

Sports Innovation Lab has developed a hierarchy to organize licensed vendor-level data of anonymous credit card and debit card transactions of over 20M United States-based consumers over the past eight years,

allowing us to analyze behavioral patterns of consumptive habits and create transactional personas. This data set provides another set of evidence-based intelligence to validate our self-reported survey data.

## **Text Analysis**

To complement the quantitative methods described above, Sports Innovation Lab analysts conducted text analysis of online forums and social media posts specific to soccer and sports fandom in the United States. Focusing on Reddit and Twitter, comments and posts from relevant subreddits were scraped and coded for content.

## **Expert Interview**

Finally, experts from the global soccer industry were interviewed to provide important context and perspective on the findings in this report. When appropriate, insights from interviews are quoted throughout this report and attributed to the interview subject.



# PART I: THE MOST PROMISING MARKET IN THE WORLD

This first section focuses on the broad opportunity to unlock soccer fandom in the United States. It makes the case, through data, that popular interest in soccer in the United States still lags behind the rest of the world and examines macro-trends to identify population centers for soccer fandom in the United States.



A man in a blue soccer jersey is shown in profile, looking out towards a stadium at night. The stadium is filled with spectators, and there are bright fireworks or light displays in the background. The lighting is a mix of blue and red, creating a dramatic atmosphere.

“

When LAFC was announced, the odds were against us. There were already ten professional sports teams in the LA market. We knew we had to think differently.

Lots of sports teams talk about scale out of the gate. We knew that the only way to build something meaningful that would last in LA would be to have grassroots patience to build community street by street, block by block, one by one. In the long run, committing to depth and not width works. And committing to relationships and not transactions works.

*Rich Orocso*

Rich Orocso, Chief Brand Officer  
Los Angeles Football Club (LAFC)

# THE MOST PROMISING MARKET IN THE WORLD

When it comes to soccer, the United States is different. For centuries, all over the world, fans of soccer have built deep-rooted fan communities and traditions that go back generations. Children are born into their fandom—handed down kits and colors from their parents who received the same from their own parents. This legacy is perfectly encapsulated in the words of philosopher-striker Eric Cantona, from the film *Looking for Eric*, “You can change your wife, your politics, your religion, but never, never can you change your favorite football team.”

**But in the United States, soccer fandom is still relatively new, and rarely generational.** While fans may still inherit an NFL or MLB team from their family, the options for new soccer fans are often wide open. Why might a US-based fan choose to support Angel City FC or Juventus? Which soccer stars do they care about, and how did they find them? The United States is arguably the last open, valuable market for soccer growth, and potential fans are here to be won.

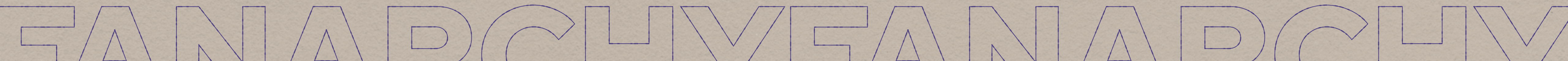
More to the point, the United States has a vast population of potential soccer fans that are yet to be unlocked. The United States is deeply passionate about sports broadly, and yet soccer is still an underappreciated sport compared to the rest of the world.

Despite two decades of growth, only about a quarter (27%) of United States-based sports fans say they follow soccer, which is drastically lower than many other major sports in the United States. By contrast, American football is the most popular sport (52%), with basketball (43%) and baseball (37%) further behind.<sup>5</sup>

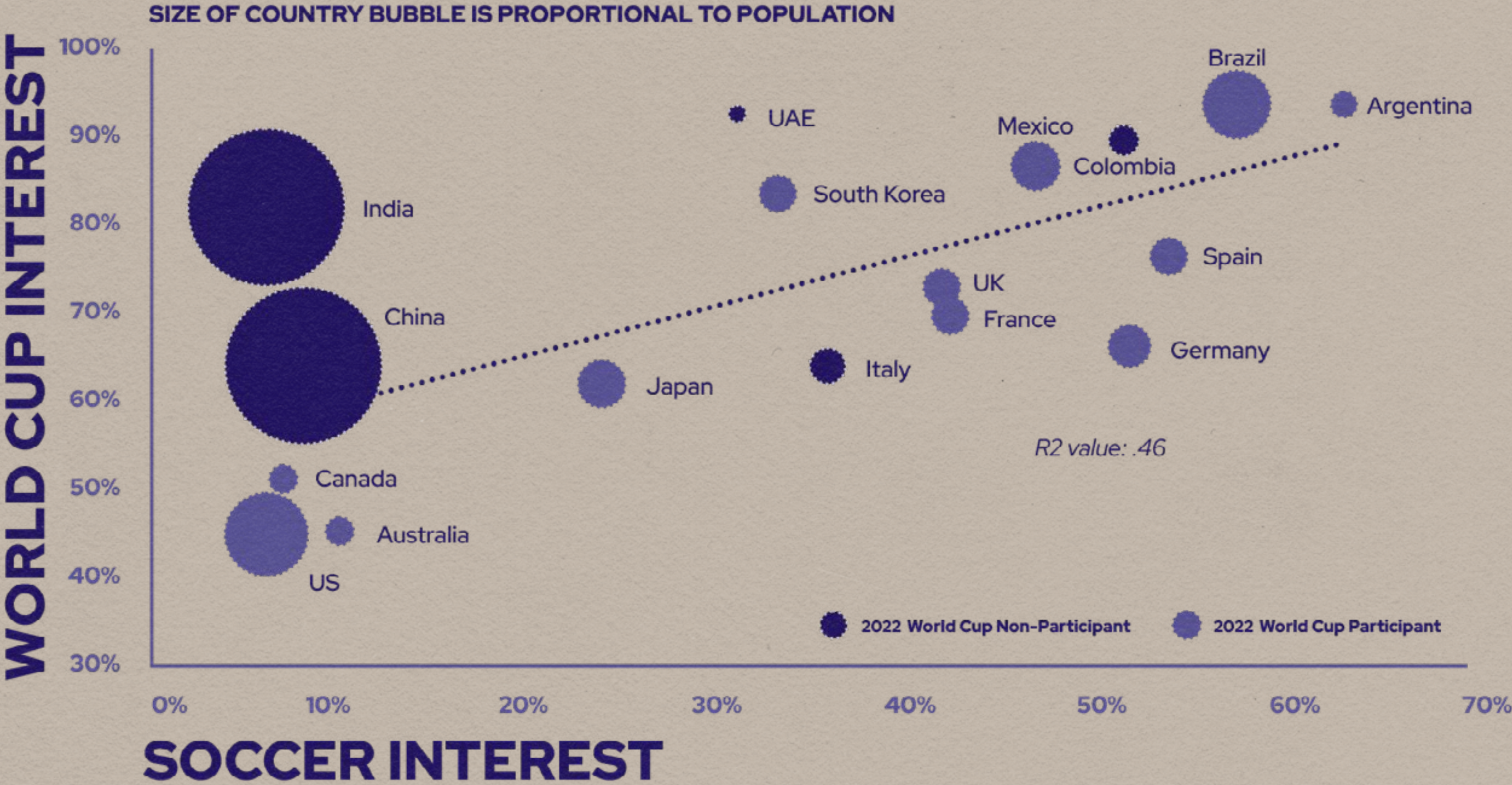
Compared to the rest of the world, soccer’s popularity is drastically low. Estimates on the total global population of soccer fandom vary, but according to Nielsen, as of 2022, 40% of the world’s population is interested in the beautiful game.<sup>6</sup> By other estimates, that 40% may be low. FIFA reported that approximately 5 billion people “engaged” with the Qatar World Cup, and while the language is obviously vague, that equates to a staggeringly large 63% of the world’s population.<sup>7</sup>

## Part I: The Takeaways

- There is room for growth with only 24% of US sports fans following soccer
- The women’s game is big here like nowhere else
- OTT and digital media have accelerated growth opportunity for global properties and brands
- Soccer fans in the US spend more on soccer than other sports fans
- Global tournaments (World Cups, Olympics) will create a “second wave” of attention in the US



Other data and analyses tell a similar story. Gallup Polls from 2017 show modest growth in US interest in soccer year over year but shockingly low overall numbers, with only 7% of respondents indicating that soccer is their favorite sport to watch.<sup>8</sup> Altman Solon’s study of global soccer fandom shows that the United States remains far behind the rest of the world in terms of interest in soccer broadly and interest in the 2022 FIFA World Cup in Qatar (see Figure 1).<sup>9</sup>



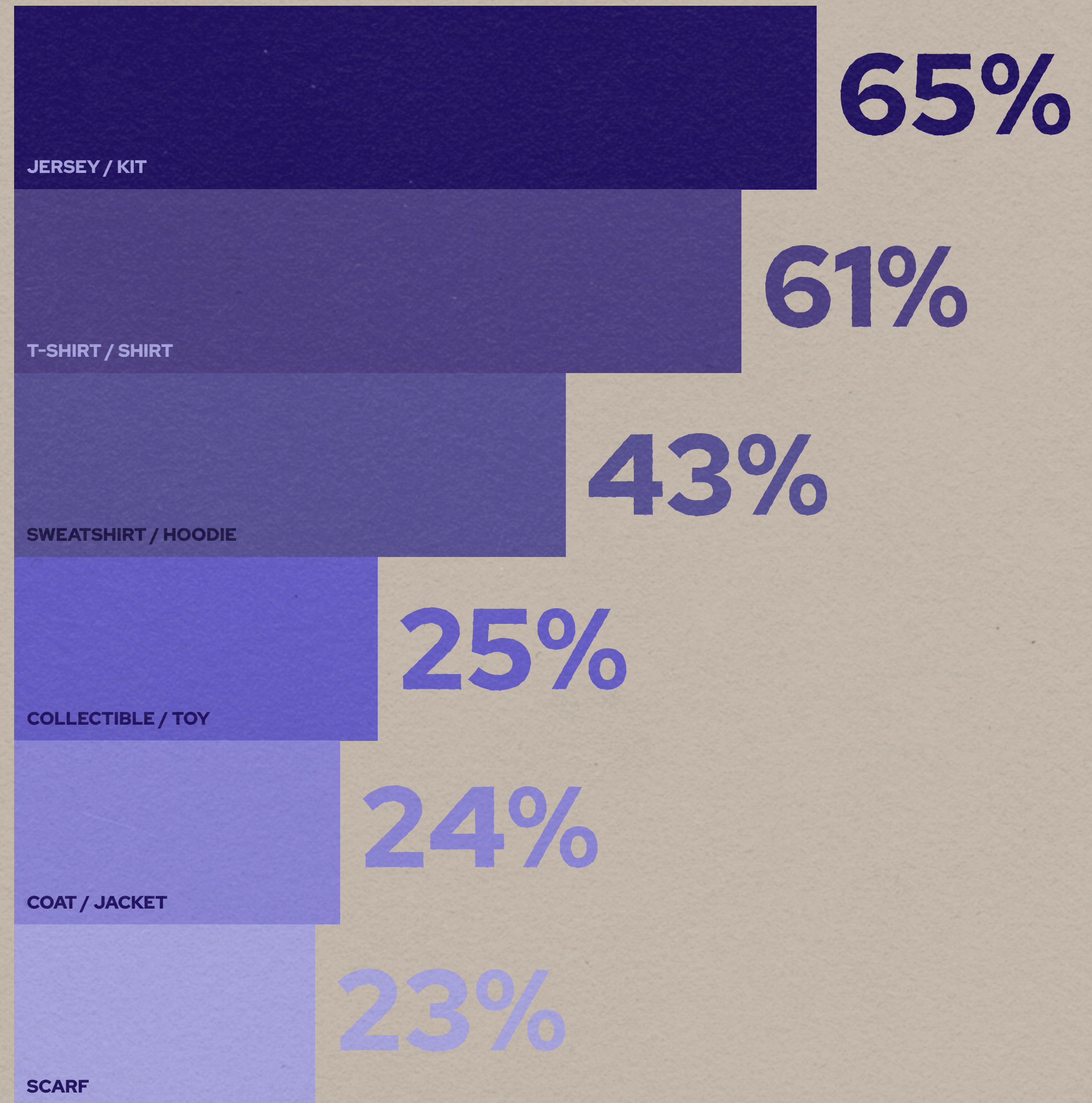
**Figure 1:** The relationship between interest in the World Cup and general interest in soccer shows just how far behind other nations the United States still is with regard to the overall level of soccer fandom. Source: Altman Solon, November 2022.

### A Valuable Market

In addition to unlocking the growth potential of soccer in the United States, there is also an opportunity to tap into a passionate fan base that is hungry for more engagement with the world's game. Those soccer fans who are here already match the passion of some of the most enthusiastic fútbol fans in the world.

- On a scale of 0-5 measuring passion, where 5 is the most passionate, fans of soccer in the United States average 3.32, well above the median of 2.5
- Additionally, 48% of fans indicate that they are either "Somewhat Passionate" or "Very Passionate" about soccer
- 79% of fans watch at least one match per year at a bar or restaurant with other fans
- The majority of fans, 56.7%, will watch more than two matches per week at home on television or via livestream on another device<sup>10</sup>

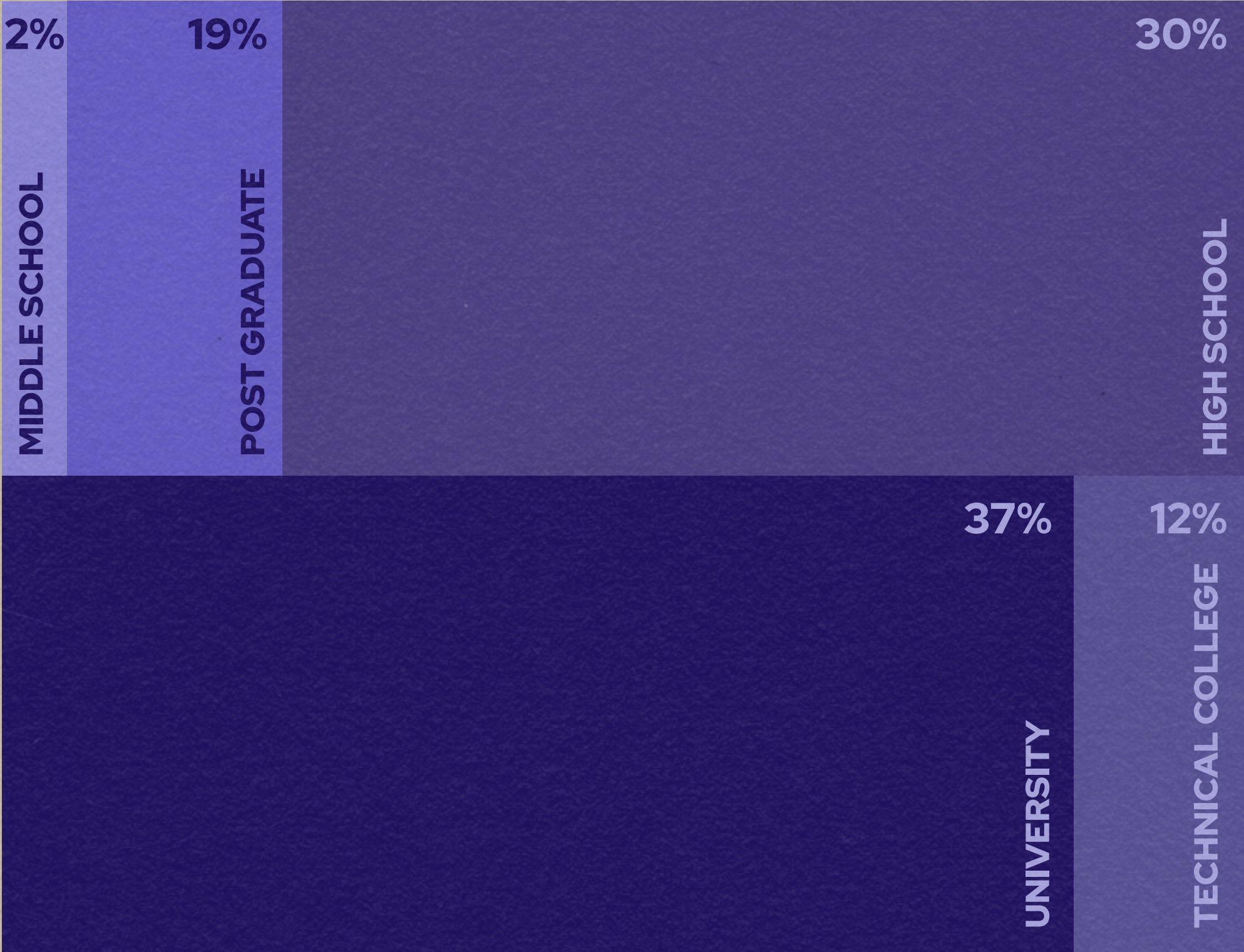
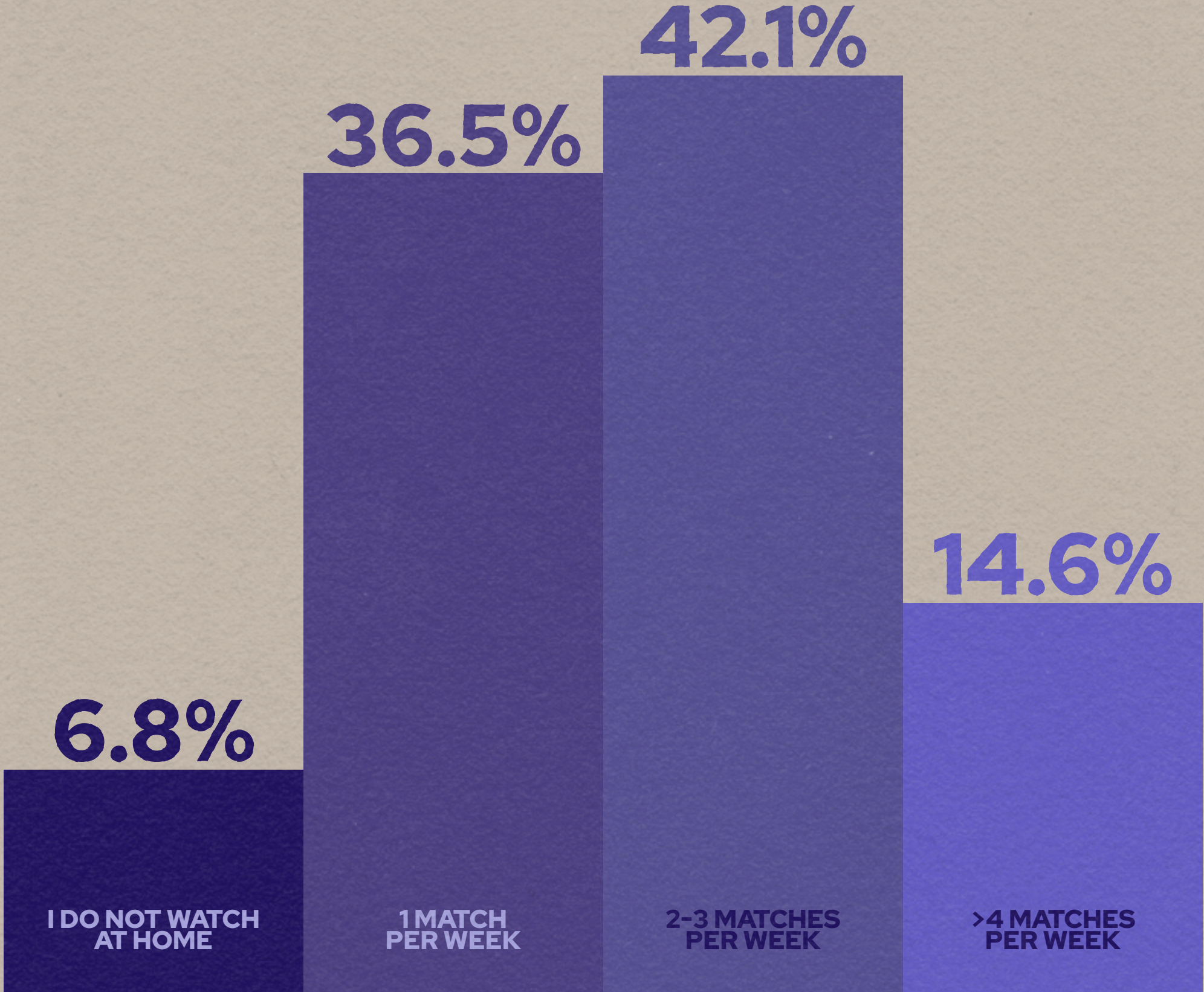
Their passion translates into spending, as well; 72% of US-based soccer fans will purchase a ticket and attend a match at least once per season, and 71% spend on soccer-related merchandise yearly. The most popular soccer-related fan item is the Jersey/Kit (65%),<sup>11</sup> which has evolved to become a major part of a burgeoning soccer street-fashion "Blokecore" movement in the United States.<sup>12</sup>



# US MARKET FANDOM: AT A GLANCE

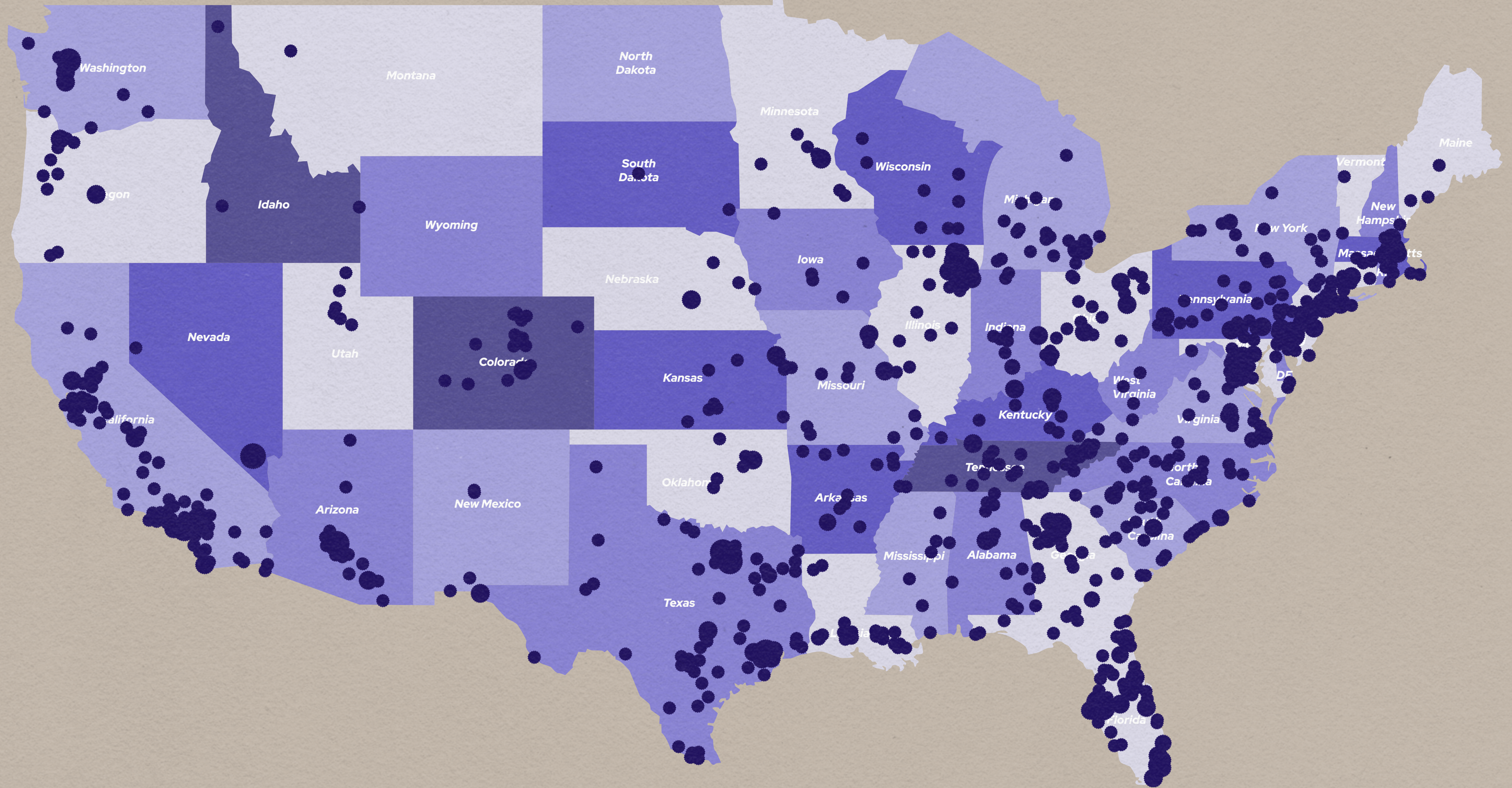
"HOW FREQUENTLY DO YOU WATCH SOCCER MATCHES ON THE TELEVISION OR ON A LIVESTREAM AT HOME?"

EDUCATION LEVELS



Source: Sports Innovation Lab, 2022-23, n-1500

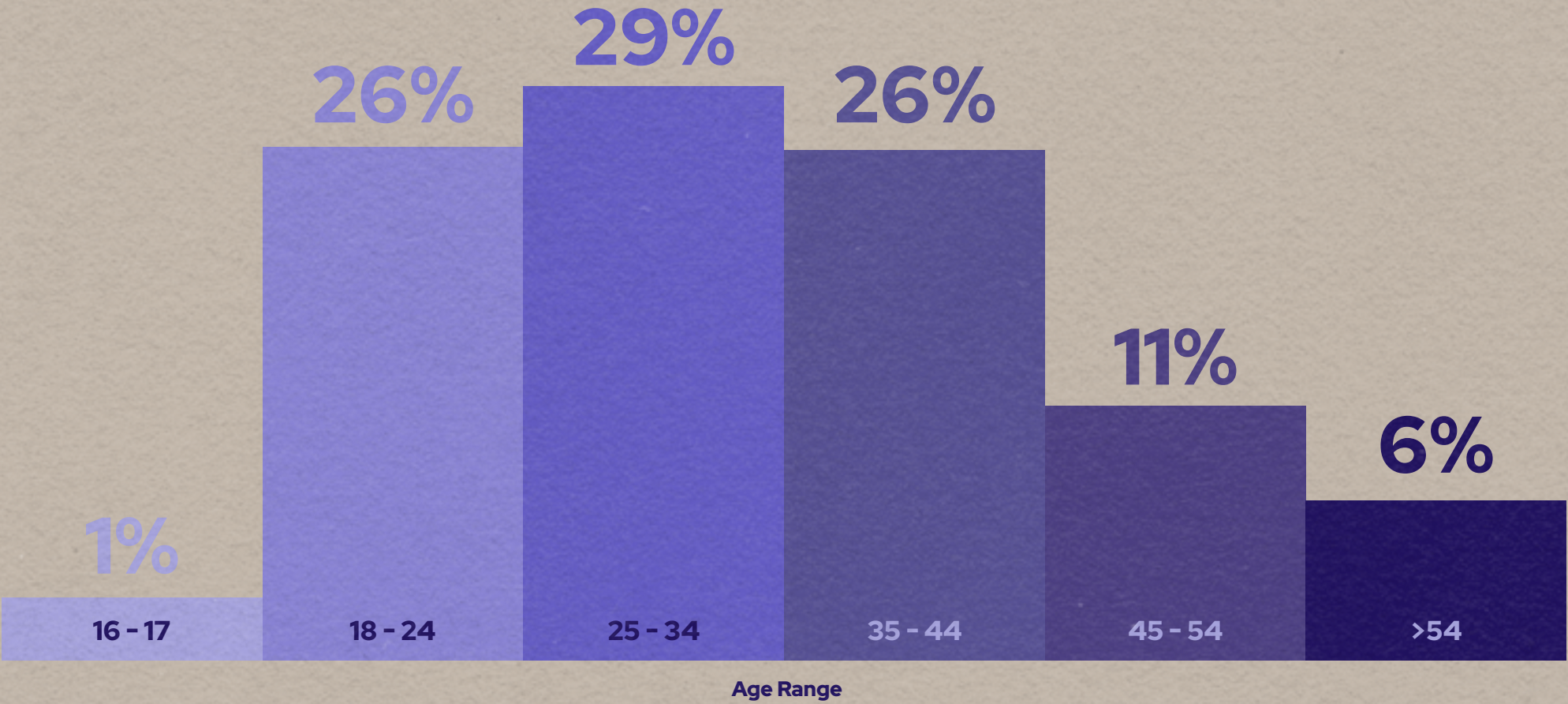
# WHERE SOCCER FANS LIVE



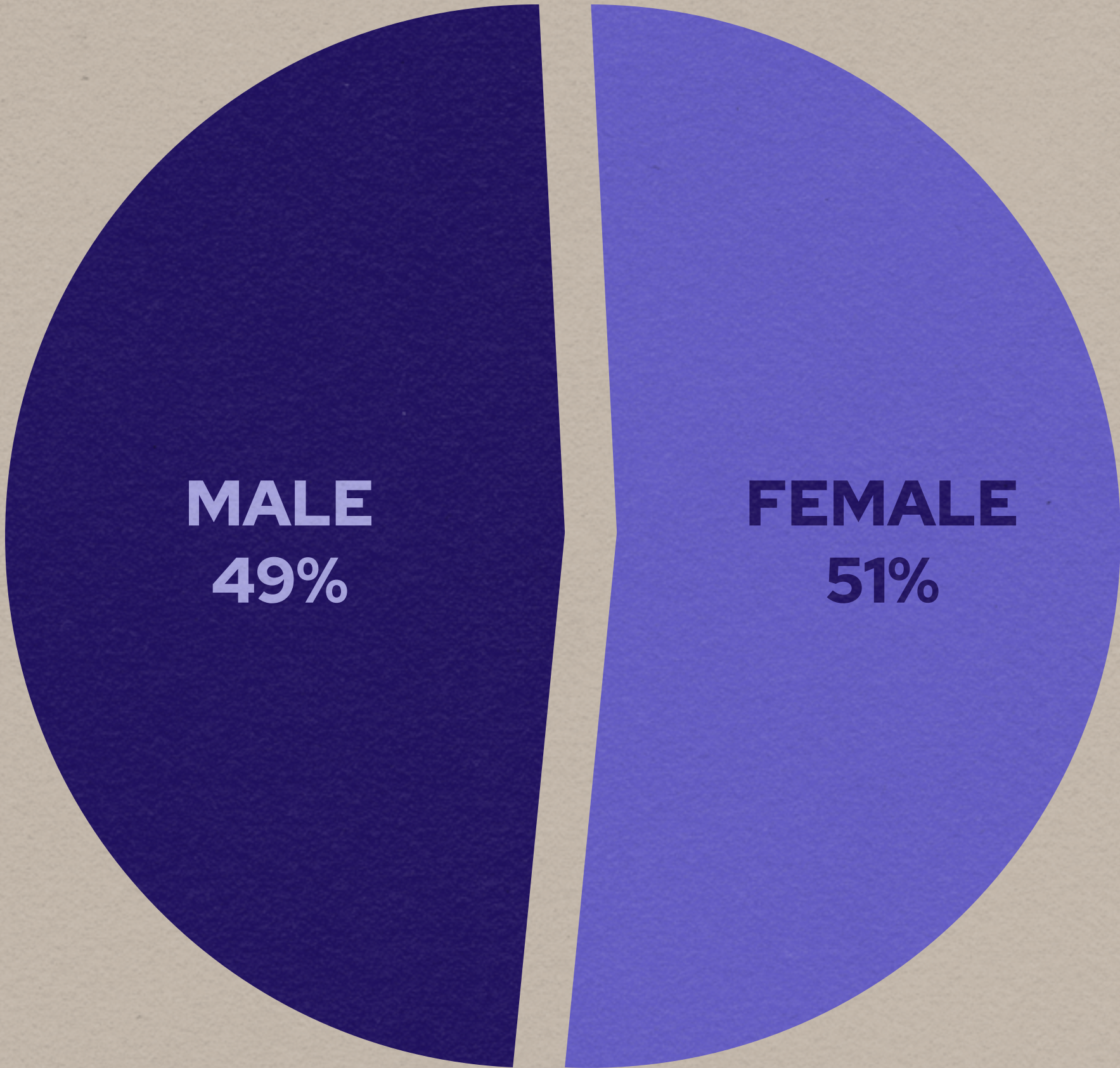
FANAPCCHVGFANAPCCHV

# US MARKET FANDOM: AT A GLANCE

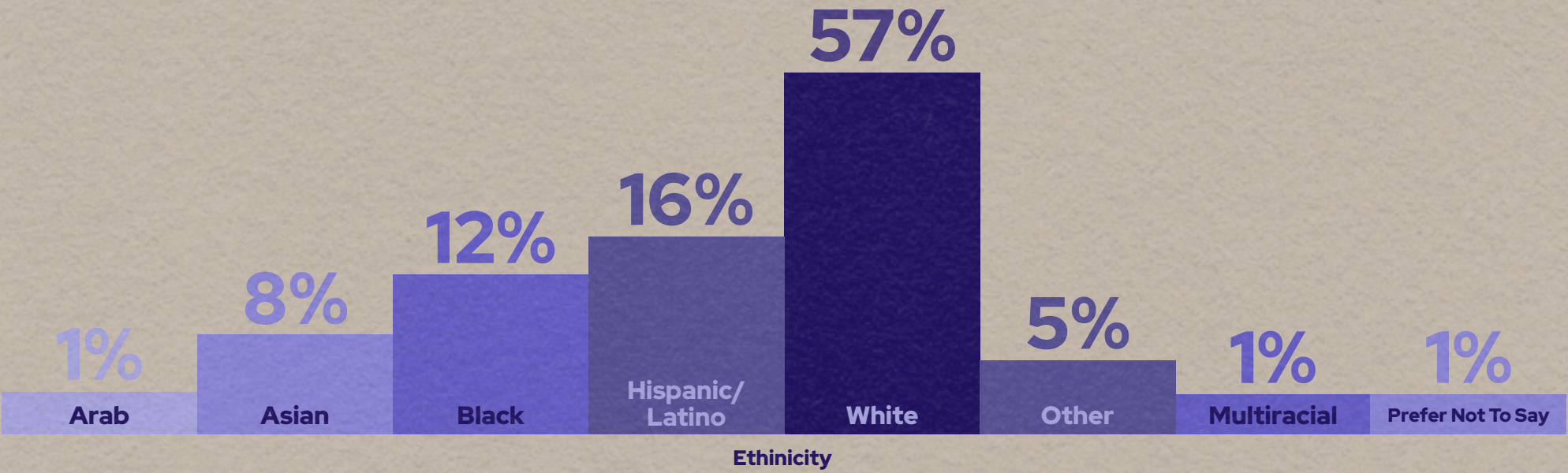
US-BASED SOCCER FANS - AGE



US-BASED SOCCER FANS GENDER IDENTIFICATION



US-BASED SOCCER FANS - ETHNICITY





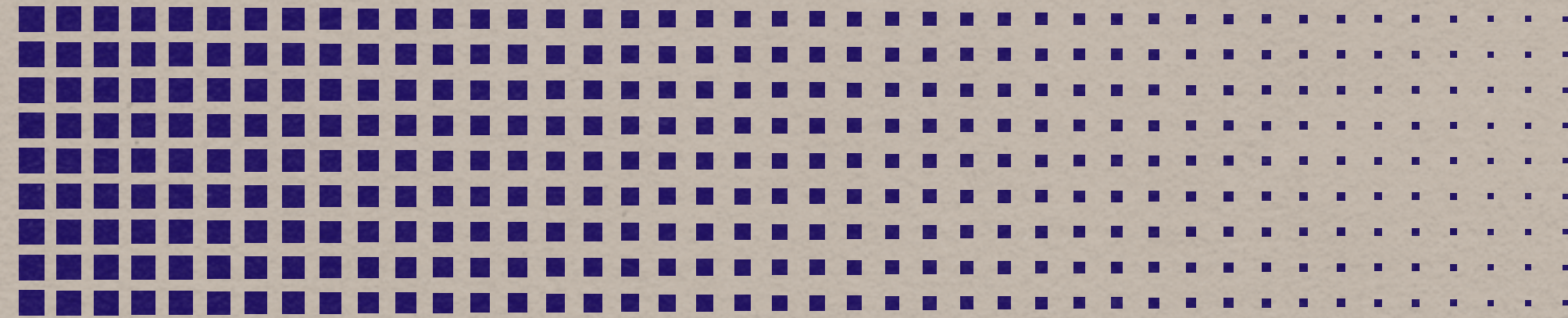


“

As sports fandom continues to change and evolve, we are humbled by the opportunity for the Premier League to earn the passion and attention of emerging soccer fans in the United States. Working hand in hand with our broadcast partner NBC, it is crucial that we use data and fan intelligence to ensure that we approach the market authentically.

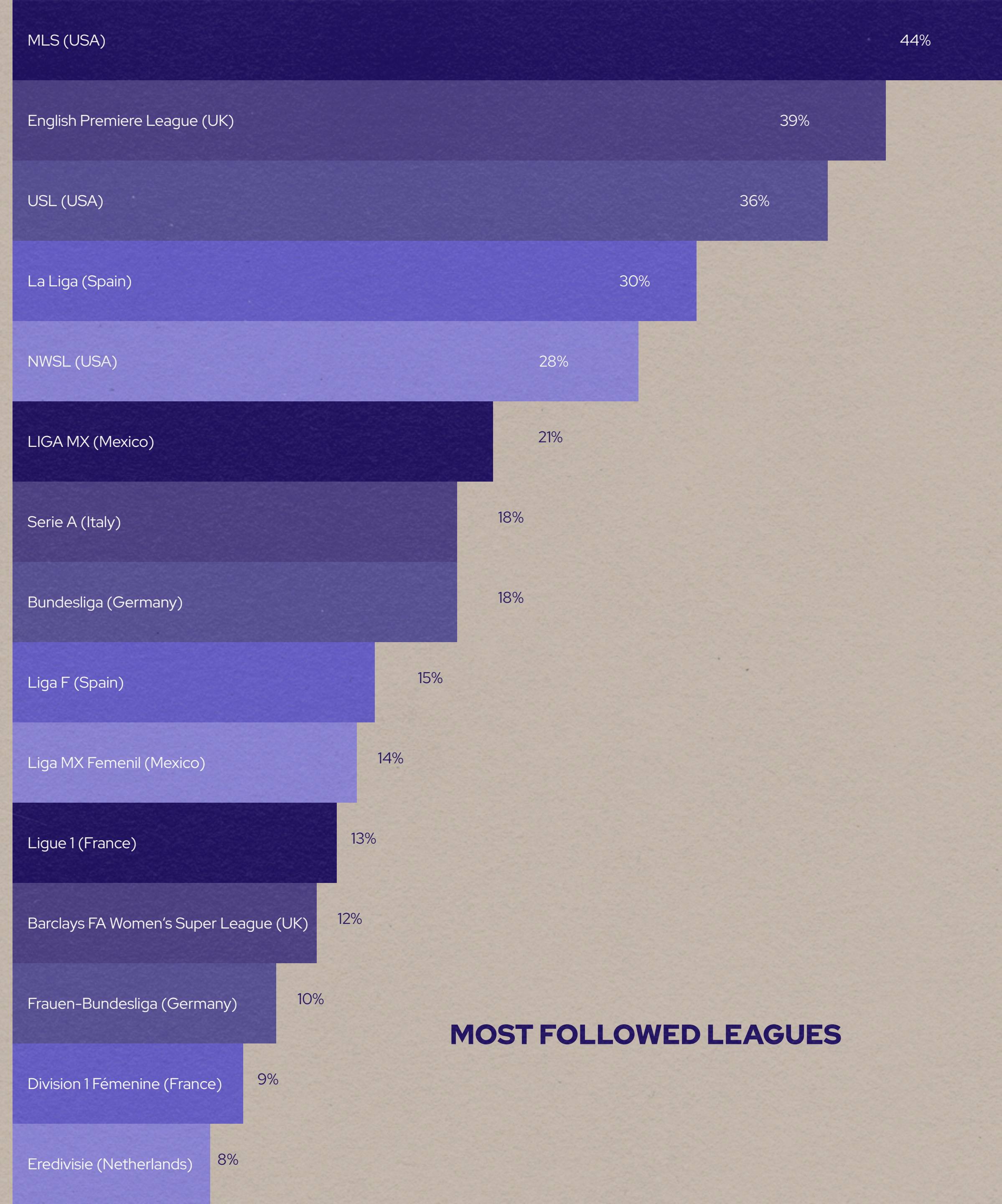
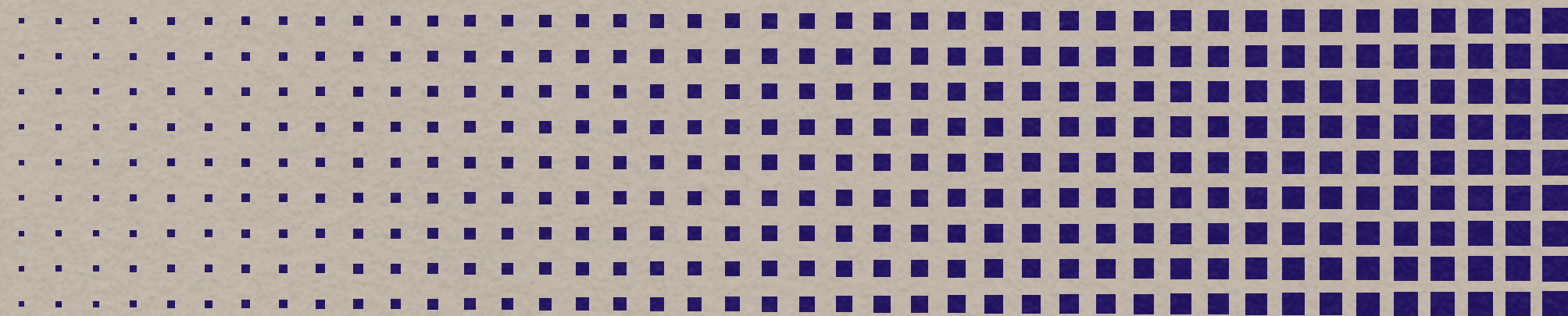
*Alexandra Willis*

**Alexandra Willis, Director of Digital Media and Audience Development, The Premier League**



# DIGITAL BUT LOCAL

Part of what makes the opportunity to unlock soccer growth in the United States so unique and promising is that it is taking place at the same time we are reaching unprecedented levels of globalism in sports. As outlined in previous research on the Fluid Fan, in this new age of sports, access to global sports competitions and properties has never been easier. This is especially true with soccer—in the past five years, live streaming and OTT media rights have brought the most popular leagues from all over the world onto screens in the United States, opening up new viewing and fan opportunities.



**MOST FOLLOWED LEAGUES**

But even amidst this period of unparalleled global access, our data suggests soccer fandom in the United States may be following a more traditional growth trajectory that starts local before becoming global.

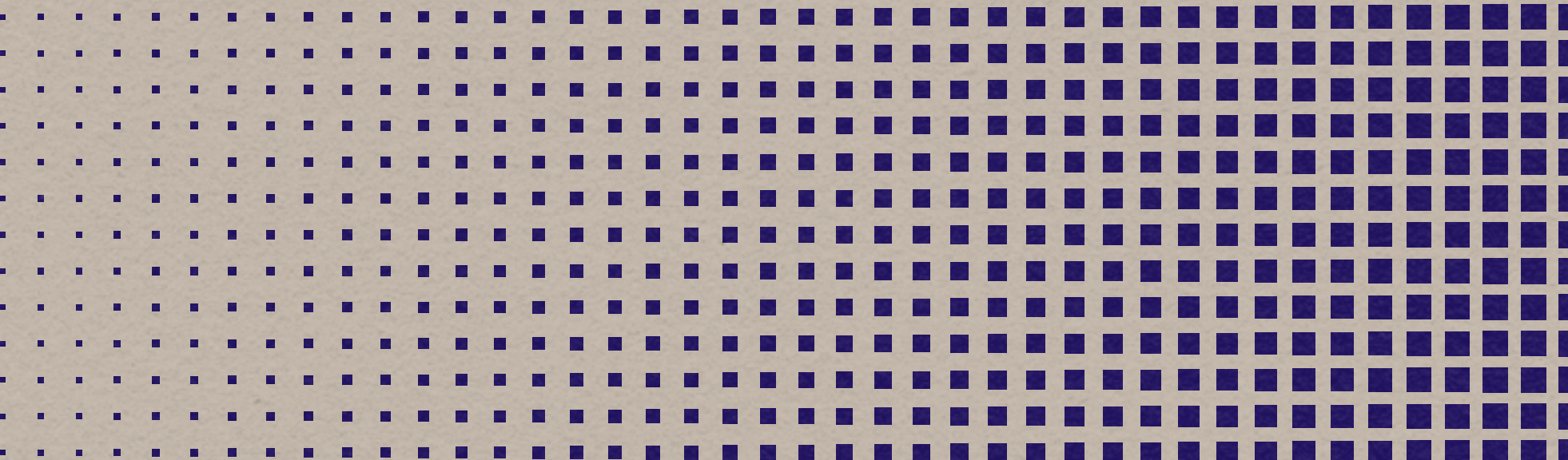
Fans in the United States may not be drawn to the sport by the biggest global stars and teams. Instead, they are discovering soccer through other avenues, like pop culture references, international competitions, or parenting, and their early fandom is focused on the most local team available.

**“...soccer fandom in the United States may be following a more traditional growth trajectory that starts local before becoming global.”**

When asked which professional leagues they follow, 44% of respondents indicated that they follow Major League Soccer (MLS), making the highest domestic division of men’s soccer the most popular league in the United States. On the surface this may not be surprising—we might expect that the top men’s domestic leagues would rank highest in their home country. But the remainder of the Top 5 tells an interesting story. In third overall, with 36% interest is the USL, the challenger men’s competitive league, and in fifth place, with 28% interest is the NWSL, the highest domestic women’s league. While the English Premier League and La Liga unsurprisingly are also in the Top 5, the data suggests that local properties are a primary focus for United States fans. Of note, La Liga was the most followed league amongst respondents to the Spanish-language survey, followed by 59% of fans. This suggests that La Liga might have a strong fan base amongst US-based, Spanish-speaking fans.

Transactional data supports fans’ local preference, as well. We found that the vast majority of MLS fans (69.7%) live within 30 miles of the venue for the team they make the most purchases with. This percentage is higher than fans of other American sports leagues, such as the MLB or NFL, and suggests that American soccer fans may have a geographic bias for choosing which teams they support.

This perspective gets murkier, however, when looking at viewership numbers between matches in different leagues. An early February 2023 matchup between Tottenham Hotspur and Manchester City broke United States viewing records, with a reported 1.78M viewers across all platforms.<sup>16</sup> Meanwhile, a month later, opening weekend matchups for the MLS don’t appear to have reached the same heights. FOX pulled in only 390,000 viewers for the season opener between Nashville and NYCFC.<sup>17</sup> And while the new Apple TV+ deal would need to be considered for a wholly accurate comparison, what seems clear is that broad viewership numbers tell a different story about league-level popularity in the United States.



	Local	Commuter	Distanced
<b>MLB</b>	57.8%	15.3%	26.9%
<b>MLS</b>	69.7%	13.7%	16.6%
<b>NBA</b>	63.4%	14.2%	22.4%
<b>NFL</b>	37.0%	20.2%	42.8%
<b>NHL</b>	57.4%	12.6%	30.0%
<b>NWSL</b>	60.5%	16.2%	23.3%
<b>WNBA</b>	62.8%	12.8%	24.5%

A percentage estimate on how far fans live from the nearest venue of the league they follow. "Local" is <30 miles from a venue, "Commuter" is 30-120 miles from a venue, and "Distanced" is 120+ miles from a venue.

The United States is directly connected to the newfound access to live matches via OTT. But it may be that for soccer fans, having a local team matters as much or more. It's also possible that the connections between media viewership and live attendance are less strong amongst soccer fans than with other sports.

**Our ongoing research into soccer fans in the United States is focusing on questions like:**

- Do soccer fans in the United States watch Premier League or La Liga on Saturday and Sunday mornings but follow their local team more closely?
- Is live attendance a key driver for soccer fandom in the United States?
- Do soccer fans in the United States have an appetite for the bigger global brands and teams in the soccer world?
- How might a global property win the affection and attention of fans in the United States?

**A Market for the Taking**

The story of soccer fandom in the US market is one of opportunity. While smaller than in other countries, the soccer fan population in the United States is smart, passionate, and growing. With so much opportunity to unlock, we have to ask: How will new fans in the United States discover soccer? What will they care about?

Leagues, teams, and brands have an unprecedented opportunity to capture a valuable and evolving sports fan market in the United States and indelibly connect their stars, their brand, and their values to new fans at the very start. Since its inception, soccer has been driven by local and legacy fan communities—new fans emerge because they live near the team, or because their parents (and their grandparents) were also fans.

But in the United States, it's different. There's opportunity in an age of global media, the Age of the Fluid Fan, to win the attention and adoration of fans as they become fans of a sport for the first time. At the same time, the messy Fanarchy of the emerging fan communities means that their rituals and habits are only just beginning to form. Therefore, earning these new fans requires an authentic approach to a market that is unique from the rest of the soccer-loving world.

This is why we have analyzed the fan journeys of thousands of US-based soccer fans and developed five essential fan personas that clearly and comprehensively reveal how US sports fans become fans of soccer, what they care about, what they do as fans, and the keys to success in winning their adoration.

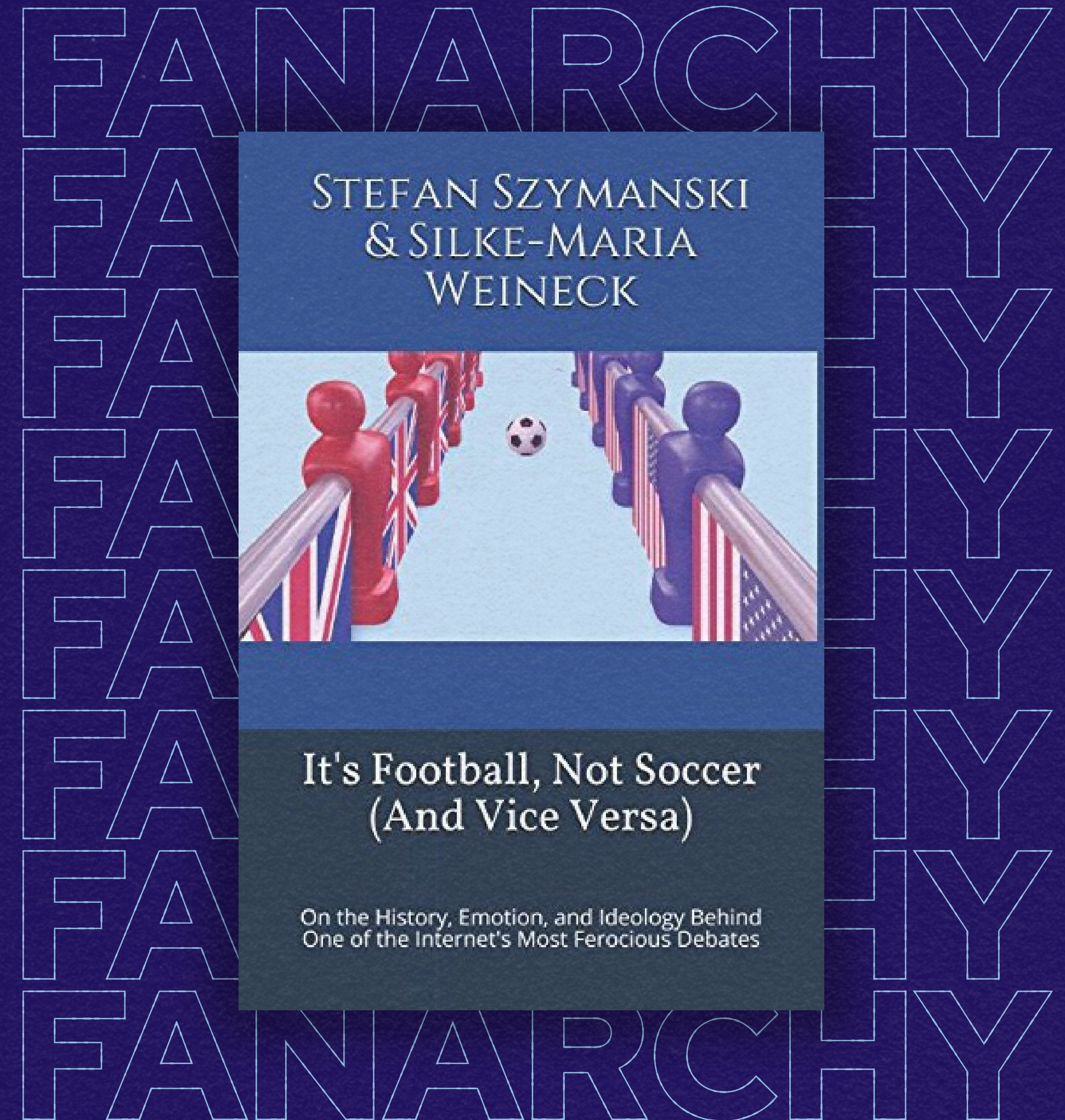
## A GAME BY ANY OTHER NAME...

It would be hard to write about football fandom in the United States without addressing the proverbial elephant in the room—why do Americans call the game “soccer?”

The reality is Americans did not invent the word soccer, and as often is the case with language, there is rich history and deep cultural implications with the term “soccer.”

The word soccer emerges because of early distinctions that were being made between rugby and what was becoming known as “association football” in Great Britain during the late 19th century (when both sports were coming into modern form). In 1871, when the Rugby Football Association was first formed, clubs began to colloquially refer to the former as “rigger” and the latter as “soccer”—an abbreviation of the term “association” in Association Football.<sup>14</sup>

The arrival of soccer to the United States coincided with the growth of American football in the early 1900s, and thus, the need again for the distinction between two sports of the same name. At the time, there was a desire to distinguish soccer as different from the relative violence of American football, as two high-profile college deaths were dominating popular discourse.<sup>15</sup> We use the term “soccer” in this report given our focus on US-based fans.



A close-up photograph of a diverse group of people, primarily young women, cheering enthusiastically at a soccer game. They are wearing blue and white soccer jerseys. The scene is filled with energy and excitement, with many people shouting and pointing. The lighting is dramatic, with strong blue and purple hues, suggesting an evening or stadium setting.

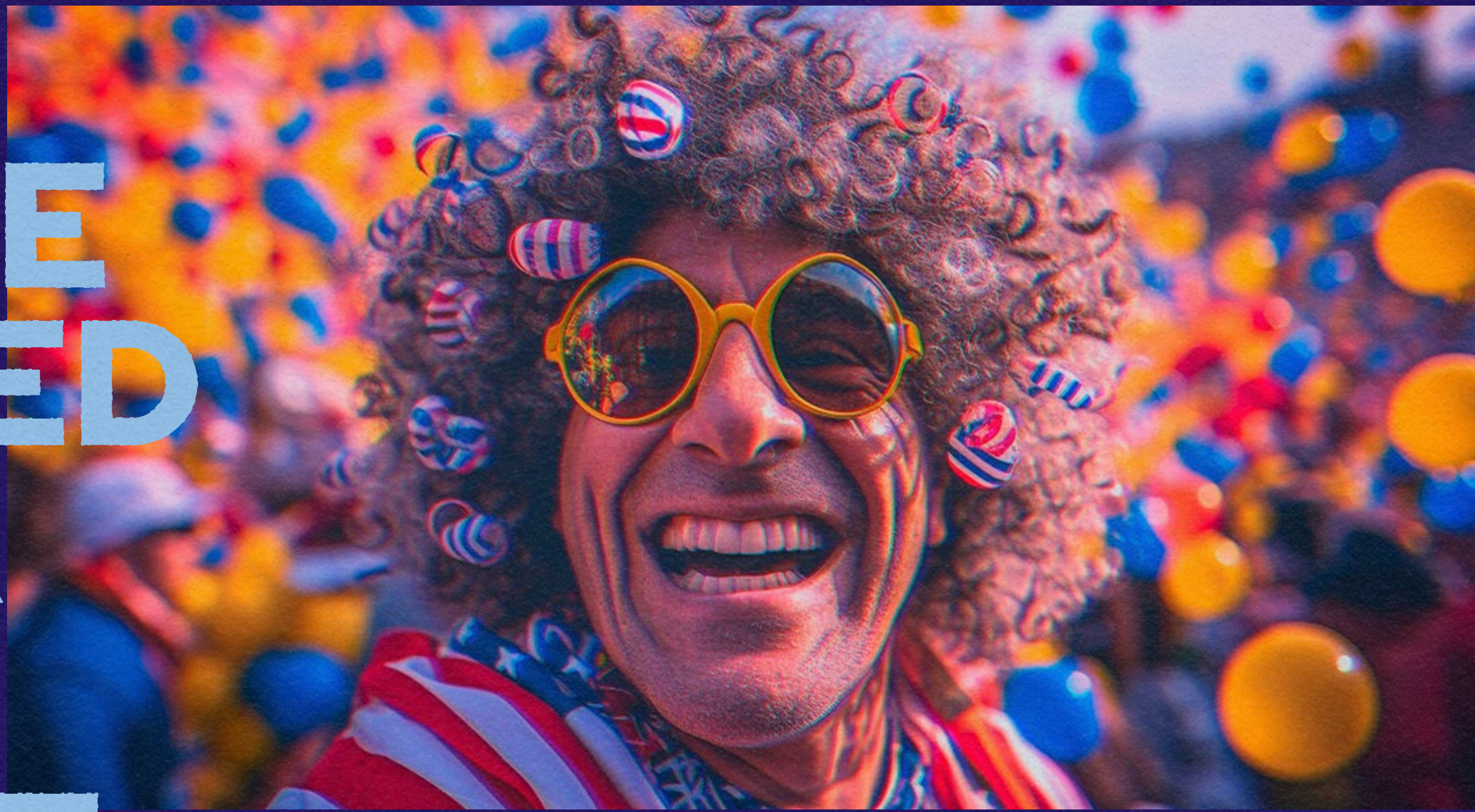
“

While we have witnessed a consistent rise in fandom over the past several decades, there is little doubt in our minds, that the next decade will be a pivotal tipping point in the growth trajectory of soccer fandom in the United States with the convergence of so many international competitions occurring on our shores. The U.S. Soccer Federation is actively collaborating with our strategic partners and soccer stakeholders across the soccer ecosystem to accelerate the growth of all facets of the sport during this unique moment in time.

*Kay Bradley*

**Kay Bradley, Vice President, Marketing  
US Soccer Federation**

# PART II: WHO ARE US-BASED SOCCER FANS? 5 UNIQUE PERSONAS



Part II introduces five soccer fan personas that are specific to fans in the United States, providing descriptions and insights into who those fans are and how they consume soccer. This section also measures the avidity and engagement levels of each persona, examines where the personas overlap, and explores the role sports betting plays in US soccer fandom.



“

What we know about US Soccer fans is that there is no such thing as a “generic” fan. The relative newness of soccer in the United States means that there is a set of unconventional fan origin stories that will be important for any brand or property to be familiar with to succeed in the US market.

*Eelco van der Noll*

**Eelco van der Noll, Head of Global Strategic Partnerships  
Anheuser-Busch InBev**



# WHO ARE US-BASED FANS?

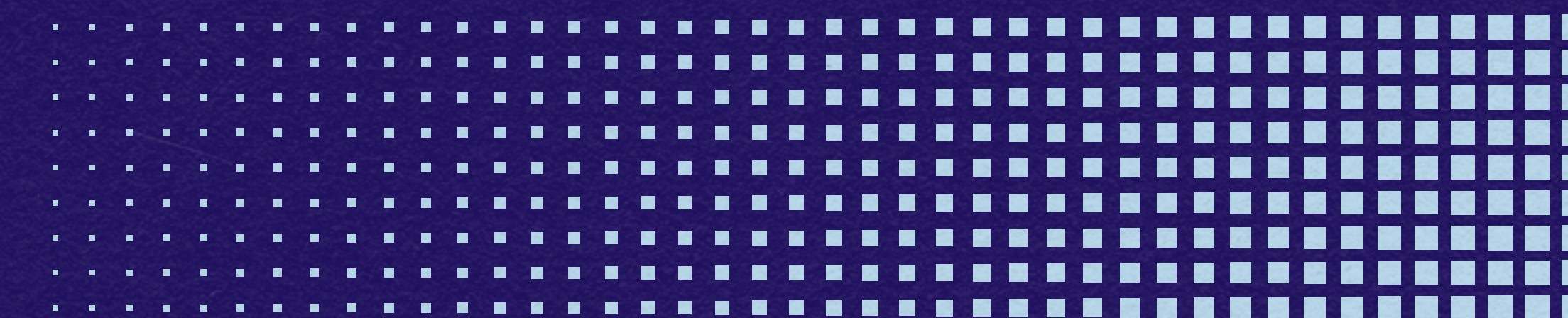
Since soccer has not historically been a fundamental part of the American sporting culture, the path to fandom for American soccer fans is different than in other countries. Instead of becoming a fan by absorbing the vibrant culture around them, there is an initial experience or spark that unlocks an individual's fandom. Although expressions of fandom evolve over time, understanding the original motivation for fandom can be an essential piece to acquiring fans. We believe there are five foundational personas that describe who American soccer fans are and how they got there.

## How We Developed These Personas

Our persona development is based on the idea of fan origination, highlighting the nascent quality of soccer fandom in the United States. We wanted to better understand how and why people in the United States become fans of soccer, and we were very intentional about using data to validate and inform our assumptions as we developed these personas.

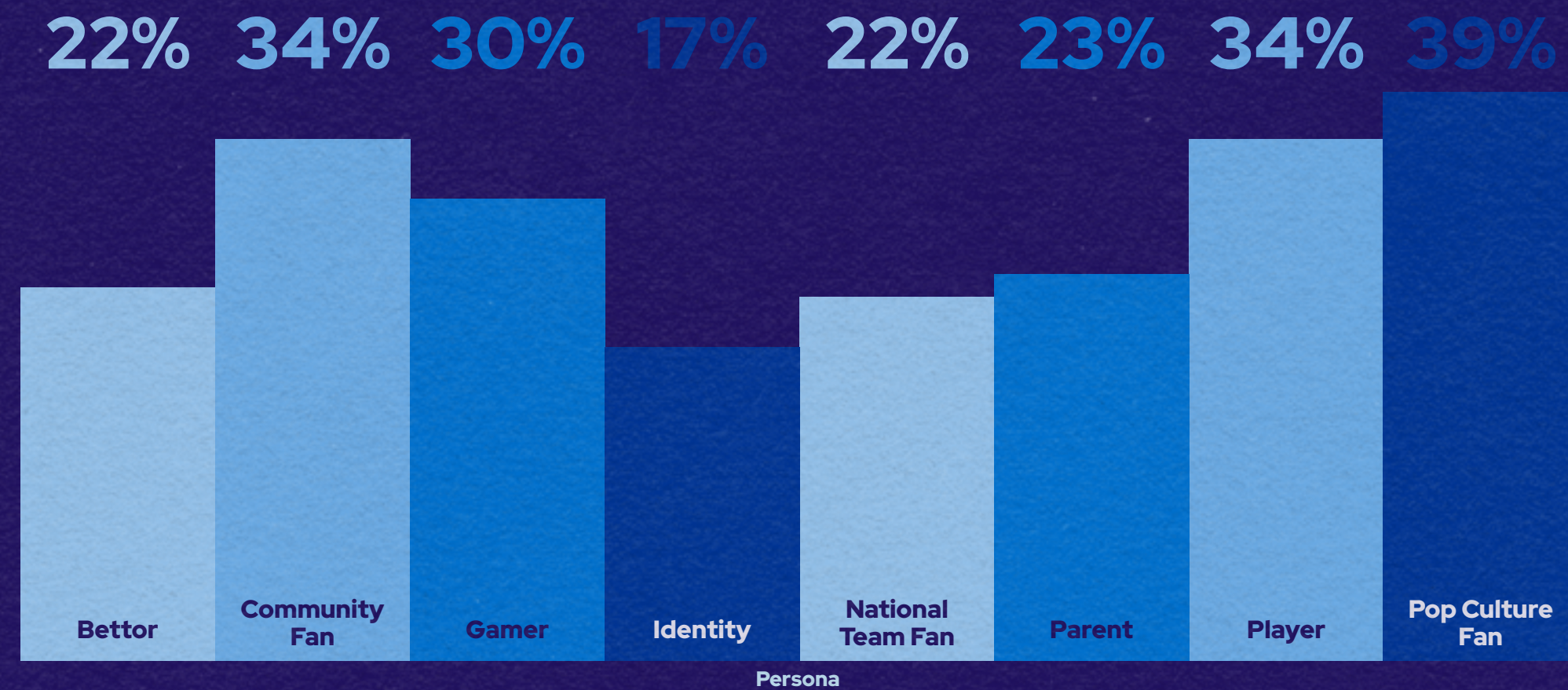
## Part II: The Takeaways

- US-based soccer fans are different from fans in the rest of the world
- US-based soccer fans are new and complex, so you cannot copy/paste your approach
- Sports businesses need to authentically address US fans
- Beyond just "soccer fans," there are five critical fan personas in the US market: **The National Team Fan, The Player, The Pop Culture Fan, The Parent, The Gamer**

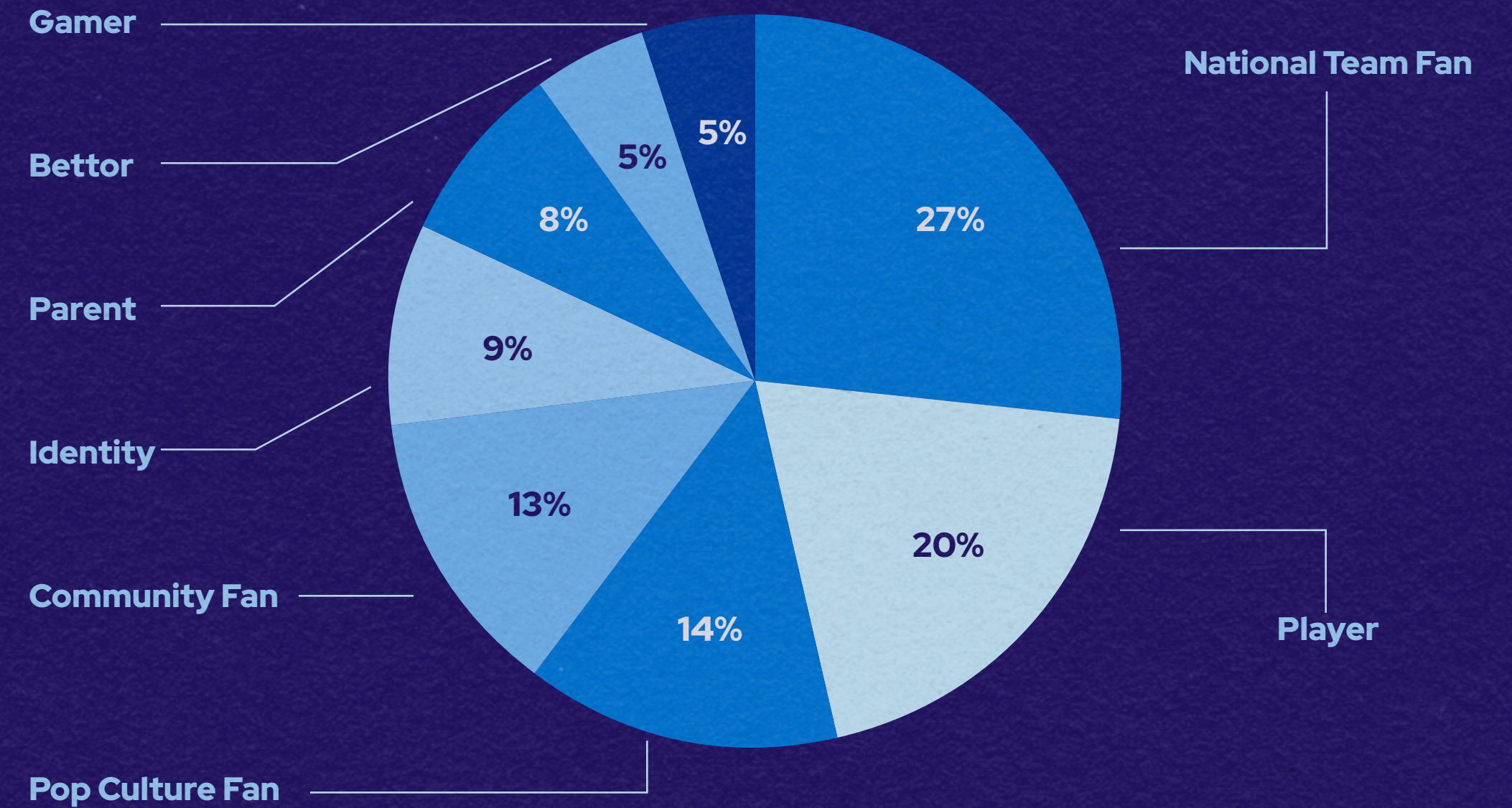


Since soccer has not historically been a fundamental part of the American sporting culture, the path to fandom for American soccer fans is different than in other countries. Instead of becoming a fan by absorbing the vibrant culture around them, there is an initial experience or spark that unlocks an individual's fandom. Although expressions of fandom evolve over time, understanding the original motivation for fandom can be an essential piece to acquiring fans. We believe there are 5 foundational personas that describe who American soccer fans are and how they got there.

"WHICH OF THE FOLLOWING SOCCER FAN STATEMENTS DO IDENTIFY WITH? (CHOOSE ALL THAT APPLY)"



"WHICH OF THE FOLLOWING SOCCER STATEMENTS CAPTURES BEST HOW YOU BECAME A FAN OF SOCCER?"



We tested eight different personas that were initially validated through a small sample study. Upon further analysis, we determined that there were some similarities amongst a few of these personas and decided that for this report the following five personas best articulate the paths to soccer fandom in the United States.

# THE NATIONAL TEAM FAN

**Supporting their National Team in international** competition is the root of fandom for the National Team Fan. Second only to the Pop Culture Fan in engagement and avidity (possibly due to the cyclical and less frequent nature of international competition), the National Team Fan is also likely to make their soccer fandom a stronger part of their identity and spend time and money following and supporting their favorite teams. While this fan lives in the US, they are not necessarily a fan of the US national teams. International competition can bring out the strong international identities and affinities of fans with family origins in other countries.



**"I BECAME A FAN OF SOCCER BY SUPPORTING MY NATIONAL TEAM. (USA, MEXICO, CANADA, ETC.)"<sup>18</sup>**

#### **Engagement Strategies:**

- Embrace feelings of national pride, identity, and camaraderie
- Tap into the thrill and power of international competition and the legacy that can be created

#### **Stats:**

- 51% male
- Preferred soccer apparel brand: Nike
- Most followed league: MLS

# THE PLAYER

**The Player became a soccer fan at a young age through participation in youth soccer.**

Their affinity for the game started by playing—and has not necessarily translated into other forms of fandom. These fans expressed less engagement or avidity than other fan personas and are less likely to spend on soccer-related merchandise, attend games in-person, or pay to watch soccer games on streaming platforms.



**“I BECAME A FAN OF SOCCER,  
BECAUSE I PLAYED SOCCER.”**

**Engagement Strategies:**

- Focus on their identity (past or present) as an athlete
- Explore how youth soccer teams are often the foundation for many life-long relationships and provide growth opportunities for kids to develop real-world skills
- Lean into shared experiences—practicing after school, away game road trips—to evoke fond memories of childhood as a soccer player

**Stats:**

- 53% male
- Preferred soccer apparel brand: Nike
- Most followed league: MLS

# THE POP CULTURE FAN

**The Pop Culture Fan is the most avid and engaged of the fan personas.**

While the origin of their fandom is a little more varied—from getting hooked by watching a TV show to growing into fandom through friends or family members—soccer is a constant presence in their lives. Pop Culture Fans are more likely than other fans to buy merchandise, attend live matches, and subscribe to streaming services, taking advantage of multiple opportunities to express and engage with their fandom.



**"I BECAME A FAN OF SOCCER, BECAUSE I WATCHED/FOLLOWED/LISTENED TO SOCCER CONTENT LIKE 'MEN IN BLAZERS', 'TED LASSO', ETC."**

**Engagement Strategies:**

- Content, content, content. Provide opportunities for these fans to engage, create, and be a part of the story
- Embrace the popular news and trends of the sport
- Demonstrate your awareness of the culture that surrounds the sport

**Stats:**

- 62% male
- Preferred soccer apparel brand: Nike
- Most followed league: USL

# THE PARENT

**"I BECAME A FAN OF SOCCER, BECAUSE MY CHILD/CHILDREN PLAYED/PLAY SOCCER."**

**Unlike other fan groups, where fandom might begin earlier in life, Parent fans become Fans as adults when introduced to the game through their kids.**

Closely connected to the Player fans, they will likely have additional emotional attachment to the sport, as it represents a shared experience with their kids. The Parent fan persona was the least likely to spend time and money on items associated with fandom (i.e., tickets, merchandise, streaming services), suggesting that competing life priorities—including fandom of other sports—may put a limit on their ability or desire to express their fandom more consistently.

**Engagement Strategies:**

- Appealing to a sense of family and shared experience
- Quick and efficient messaging

**Stats:**

- 69% female
- Preferred soccer apparel brand: Nike
- Most followed league: MLS

# THE GAMER

**"I BECAME A FAN OF SOCCER, BECAUSE I PLAYED SOCCER VIDEO GAMES LIKE FIFA, FOOTBALL MANAGER, OR EFOOTBALL."**

**Gamer fans have a broader, more global fandom of soccer.** This is evidenced by being the only persona that was more likely to be fans of a non-US-based league (English Premier League). These fans also have the strongest overlap with the National Team Fan persona, suggesting that their fandom might reside at a larger, more macro level (i.e., biggest leagues, biggest teams, biggest tournaments, etc.). Gamers may have less connection to a local team or player due to the digital and more global origin of their fandom.

## **Engagement Strategies:**

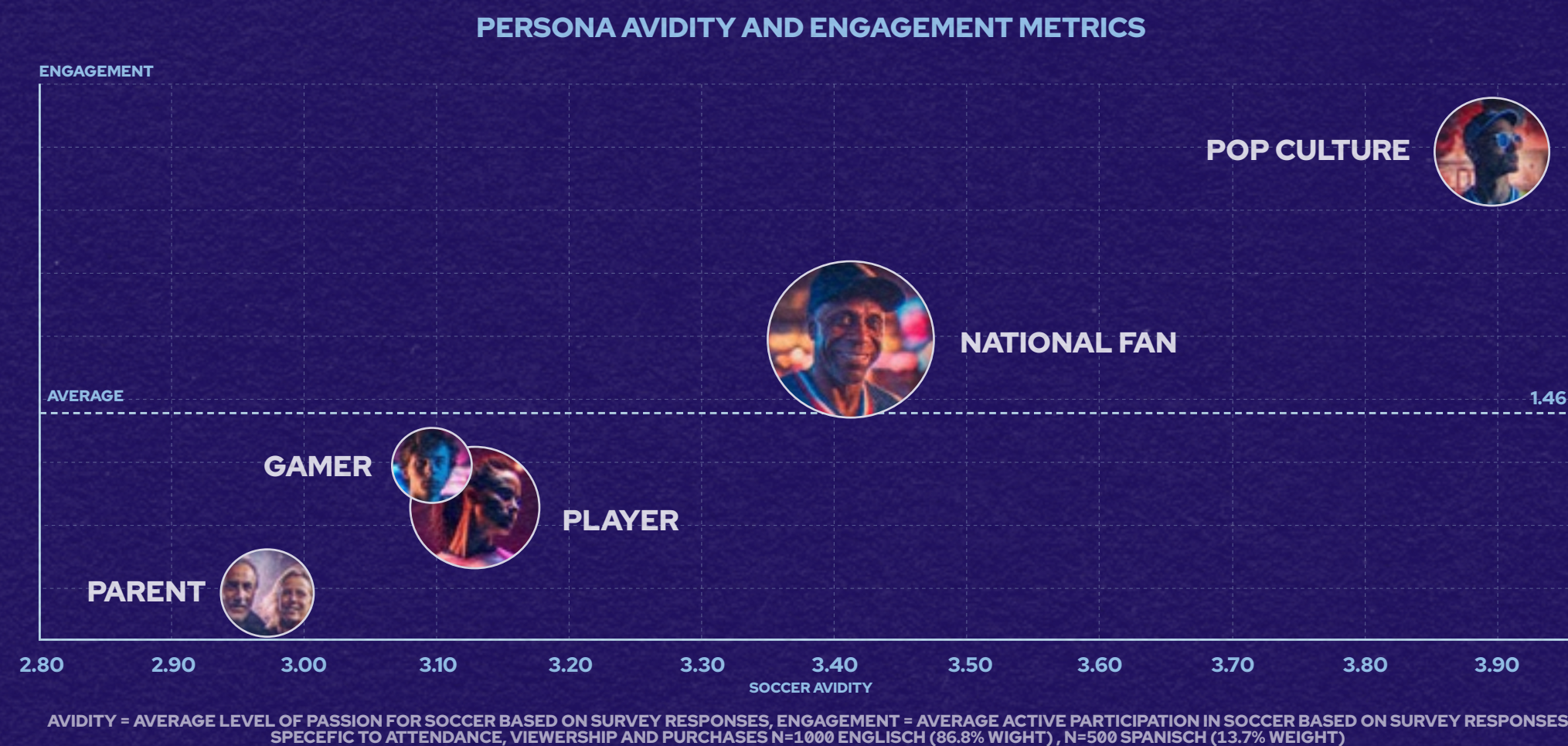
- Provide opportunities for control—these fans pick the teams, players, and competitions they participate in
- Appeal to their desire to be part of the action—scoring goals, gaining points, and earning recognition
- Their knowledge of the game is deep; don't be afraid to go into detail in your content and incorporate less "household" names into your activations
- Provide an opportunity for these fans to live vicariously through their favorite players

## **Stats:**

- 53% male
- Preferred soccer apparel brand: Adidas
- Most followed league: EPL

## AVIDITY AND ENGAGEMENT:

Part of what makes the opportunity to unlock soccer growth in the United States so unique and promising is that it is taking place at the same time we are reaching unprecedented levels of globalism in sports. As outlined in previous research on the Fluid Fan, in this new age of sports, access to global sports competitions and properties has never been easier. This is especially true with soccer—in the past five years, livestreaming and OTT media rights have brought the most popular leagues from all over the world onto screens in the United States, opening up new viewing and fan opportunities.



## PERSONA OVERLAP

We are in the Age of Fluid Fans, where fans possess dynamic relationships with sports properties and exhibit different personas and behaviors at different times.

Our findings showed that the National Team Fan persona consistently overlaps the most with the other personas. While this is not necessarily surprising, it does reinforce the importance that international competition has on fandom. Opportunities for fans to cheer for their country have a unique attraction that can capture massive audiences and convert passive fans into more avid ones. It highlights, once again, the power of the 2026 FIFA World Cup to unlock and engage fans across personas.

**CROSTABULATION OF PERSONA IDENTIFICATION**

	Pop Culture	National Fan	Player	Gamer	Parent
Pop Culture	100%	37%	41%	49%	43%
National Fan	51%	100%	61%	61%	52%
Player	37%	39%	100%	100%	40%
Gamer	38%	35%	40%	40%	37%
Parent	26%	23%	27%	27%	100%

## What Surprised Us in the Data:

- Amongst all the personas, there was strong support for US-based leagues, which runs contrary to popular beliefs about the global dominance of the top European competitions
- With the Parent persona, they heavily skewed female relative to other personas, which supports the notion that the “soccer mom” is a real factor in US-based soccer fandom
- Far and away, the most avid and engaged fan persona is the Pop Culture Fan, suggesting that the newness of their interest—or attention paid to off-the-field, “lifestyle” trends—promotes engagement





”

The United States has a unique, more diverse, and still-developing soccer culture like no other country in the world. Respecting these characteristics and communicating in an authentic manner are key to the success of any brand. The fastest way to failure is replicating the approach taken in foreign leagues.

*Ricardo Fort*

**Ricardo Fort, Founder of Sport by Fort Consulting.  
Former Head of Global Sponsorships at Visa and  
The Coca-Cola Company.**

# PART III: THE IMPACT AND OPPORTUNITY OF THE WOMEN'S GAME

The final section of the report explores the unique and powerful role of women's soccer in the growth of US soccer fandom. Unlike anywhere else in the world, the investment and appetite for women's soccer are profoundly validated by the United States market, and the case is made for ongoing investment and brand participation into women's soccer.



# THE IMPACT AND OPPORTUNITIES OF THE WOMEN'S GAME

To focus solely on men's soccer fandom would omit what is one of the most unique and important characteristics of soccer fandom in the US market: the growth and influence of the women's game.

Historically, soccer became essentialized as a men's sport across much of the world, reinforced by the bans on women's soccer in multiple countries through the 1970s and 1980s.<sup>19</sup> Even today, soccer is considered to be a highly masculine, male-oriented sport throughout much of the world.<sup>20</sup>

Although there was no ban on women's soccer in the US, opportunities for women to compete in sports were limited. This started to change with the passage of Title IX in 1972, which required that girls have equal access to sports and resulted in the investment of new money into women's sports. While other more "macho" or "American" sports in the US, such as American football and baseball, remained reserved for men, schools looked to women's soccer to close the gap in opportunities for female students, since it was a relatively cheap way for college sport administrators to comply with the law.<sup>21</sup>

Fifty years later, girls' soccer has grown perhaps more than any other women's sport.<sup>22</sup> The NCAA claims that women's soccer is the most expanded women's sport program in US higher education, having expanded 1,409% between 1982 (when the NCAA held its first women's soccer championship) and 2020-21.<sup>23</sup>

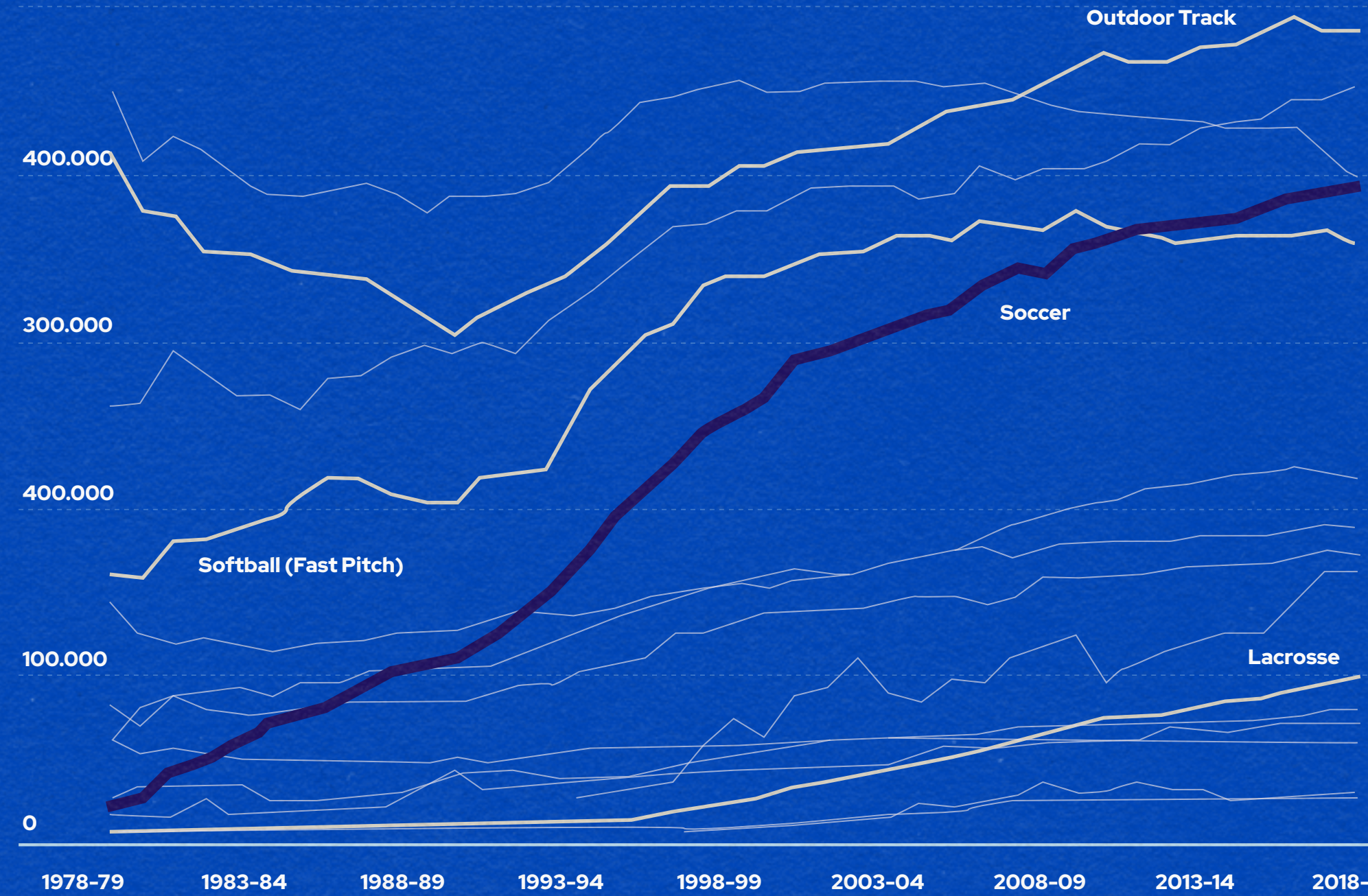
Although Title IX was passed at the same time other countries began lifting their bans on women's soccer, this active investment into the women's game, combined with the lack of masculine-association of the sport, allowed women's soccer to flourish in the US in a unique way.

### Part III: The Takeaways

- The women's game in the US is a big opportunity space for the sports industry
- A major legacy of Title IX is women's soccer participation
- That legacy has led to success on the international stage for US women
- The professional game is growing in the US rapidly
- The history of women's soccer in the US is proof that investment works

## GIRLS PLAYING HIGH SCHOOL SPORTS

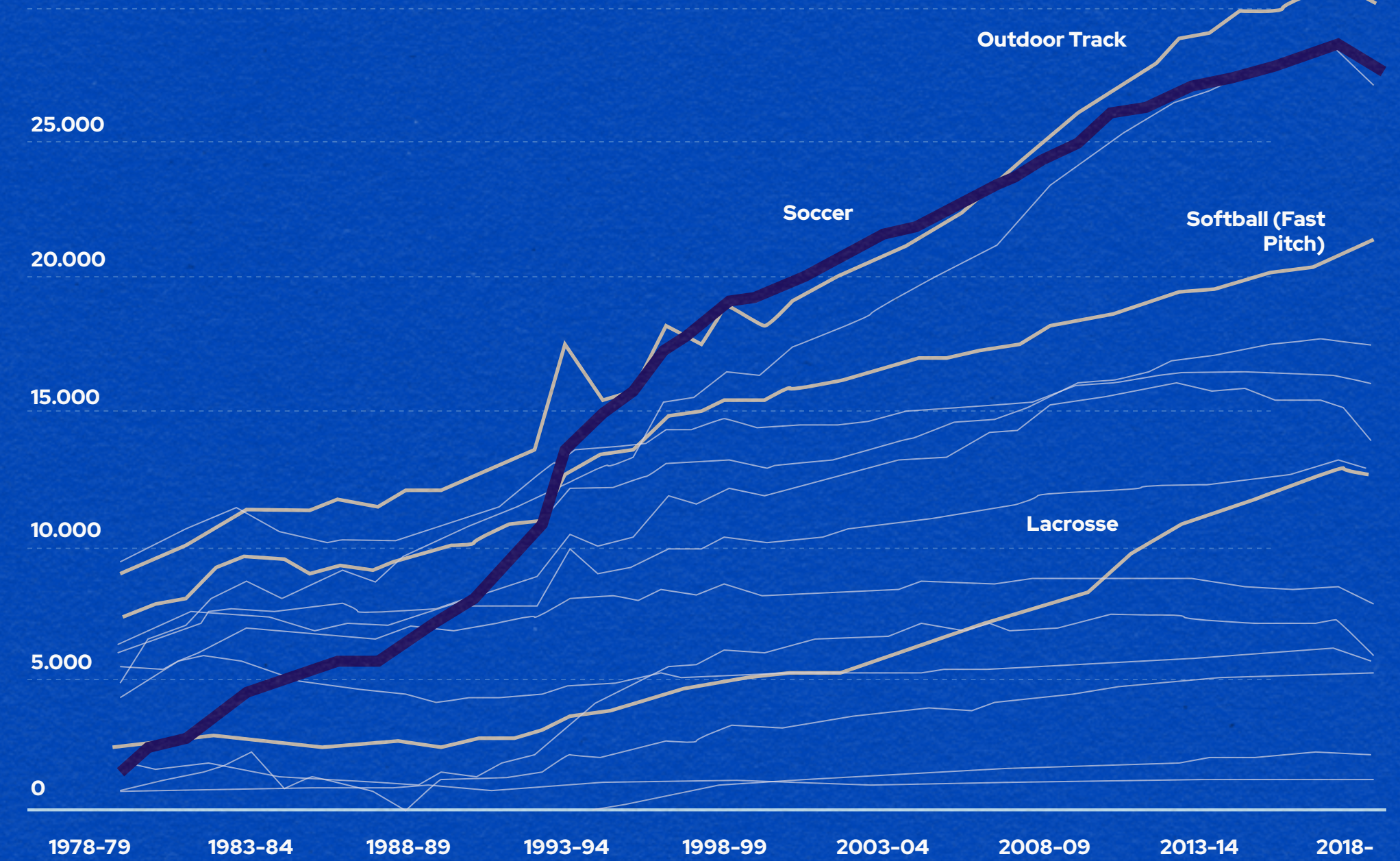
500,000 ATHLETES



Notes: Top 15 sports shown. Data is not available for all sports in all years, and comparable data is not available prior to the 1978-79 academic year. Source: National Federation of State High School Associations. By The New York Times.

## GIRLS PLAYING IN NCAA DIVISION I, II AND III

300,000 ATHLETES



Notes: Top 15 sports shown. Data is not available for all sports in all years, and comparable data is not available prior to the 1981-82 academic year. Some schools were added to the data in 1995-96. Source: NCAA By The New York Times.

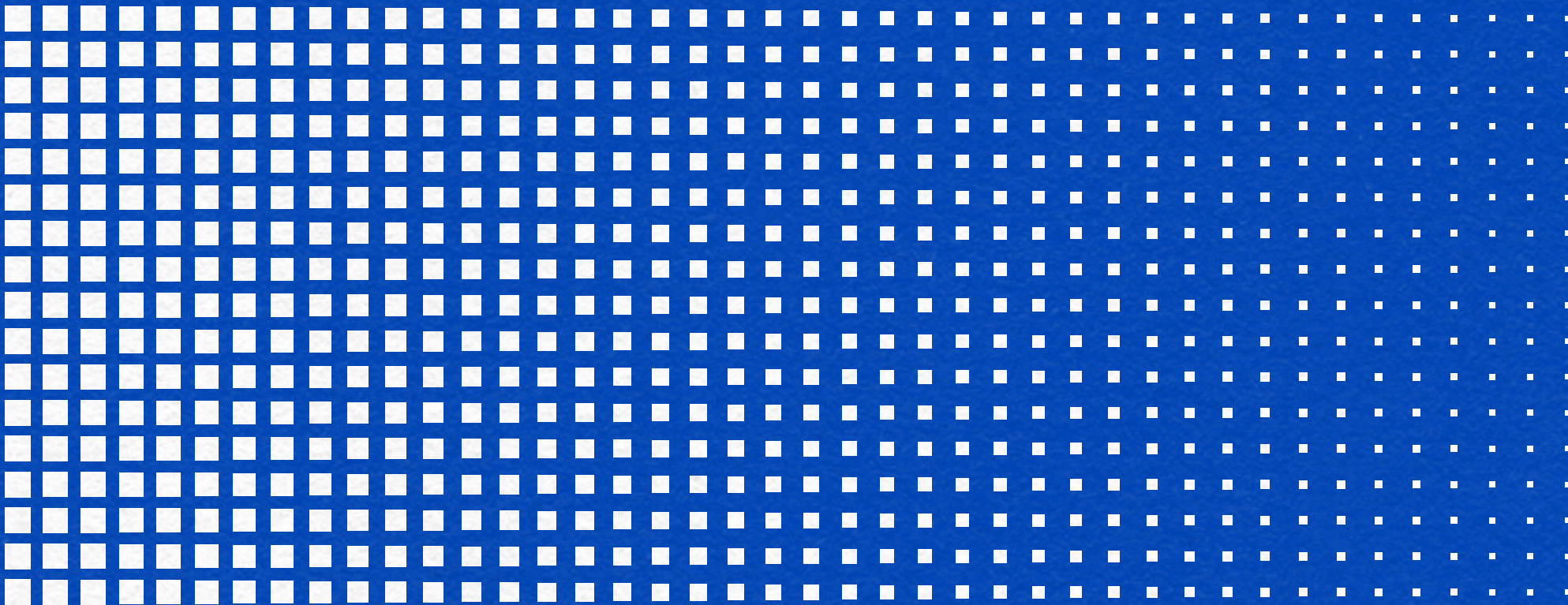
The investment into the women's game and soaring participation rates allowed for the rise of a dominant US Women's National Team,<sup>24</sup> which has helped to spur interest and fandom in the sport as a whole. The US Women's National Team has been an undeniable powerhouse on the global stage, winning four World Cup Championships, four Olympic gold medals, and nine CONCACAF Championships in total.

These dominant performances have garnered massive US audiences. More than 90,000 people watched the iconic '99ers win the 1999 Women's World Cup in person, while the 2019 Women's World Cup final brought in 14.3 million US viewers<sup>25</sup>—22% higher US viewership than France's defeat of Croatia the previous year in the Men's World Cup.<sup>26</sup>

The success of the women's team shows us that with investment comes success and with success comes fandom. When not incentivized, countries do not invest in their women's national teams, "perpetuat[ing] the attitude of women's football being a 'cost' rather than a contributor," as stated by FIFPRO in the recent call for equal World Cup prize money.<sup>27</sup>

The investment into women's soccer in the US has allowed it to be a main contributor to the sport's US fandom. But even with the US Women's National Team's success, we cannot declare that women's soccer has gone as far as it can go. Equal investment into both the men's and the women's game will allow overall US soccer fandom to grow in a way that is authentic to the history of soccer in the US.

As properties and brands consider their strategy for capitalizing on the FIFA World Cup 2026™, it is critical to recognize that women's soccer is not a philanthropic initiative: it is already a powerful force in this growing market.





”

We can clearly see from the history of women’s professional soccer in the United States that a long-term strategic plan and investment is foundational to success, both on the field and with fans. The world should look closely at how women’s soccer has developed in the United States through the various leagues and use the hard-earned lessons here to accelerate the growth of their professional leagues, as a strong professional pathway helps the game at all levels.

*Heidi Pellerano*

Heidi Pellerano, Chief Commercial Officer  
CONCACAF

# TIMELINE OF WOMEN'S SOCCER IN THE US

## 1972

Title IX passes on June 23, 1972.

## 1991

The US Women's National Team captures the first-ever FIFA Women's World Championship.

## 2001

The women's development pipeline is put on display as the Under-21 Women win their third straight Nordic Cup title.

## 2013

National Women's Soccer League begins play.

## 2022

**Collective bargaining agreements signed between US Soccer Federation and the Women's and Men's National Team unions equalizing pay and FIFA World Cup prize money.**

The 2022 NWSL Championship is the most-watched game in league history, averaging 915,000 fans on CBS network alone.

## 1982

The NCAA holds its first single division Women's Soccer Championship tournament.

## 1996

The US Women's National Team wins the first ever women's soccer gold medal at the 1996 Atlanta Olympics.

## 2012

The USWNT earn their fourth Olympic gold – a first for any country on the men's and women's sides – in front of more than 80,000 spectators at Wembley Stadium.

## 2019

USWNT win FIFA Women's World Cup in France, maintaining their gold status.

W  
A  
V  
E  
S  
A  
R  
E  
C  
H  
A  
N  
G  
I  
N  
G

# PART IV: PREPARING FOR THE FUTURE

**A COMMERCIAL AND A CULTURAL GUIDE FOR HOW TO PARTICIPATE IN THE RISE OF THE US SOCCER MARKET.**

The intelligence and insights presented in this report provide a strategic road map for activating with soccer fans in the United States. We believe in the growth opportunity for soccer in the United States, but we also recognize that there is much work to be done, and the brands, leagues, teams, federations, and marketers who are championing the sport must do so authentically.



W  
A  
V  
E  
S  
A  
R  
E  
C  
H  
A  
N  
G  
I  
N  
G



# PREPARING FOR THE FUTURE

## **1. The beautiful gain.**

Get your share of a market that is about to explode. The tremendous growth of MLS, the sustained success of women's soccer, and the demand for top international competition translates to a US market with massive potential. From all the presented intelligence will help businesses succeed in the buildup to the 2026 World Cup™ and beyond.

## **2. It's more than the game.**

Make use of the whole ecosystem of entry points the unique US personas offer (game, merch, stars, styles, events, media outlets, betting, fantasy, esports).

## **3. Women's soccer is a force.**

Invest in women (clubs, players, fans) as an accelerator for overall soccer fandom.

## **4. Blueprint of future soccer.**

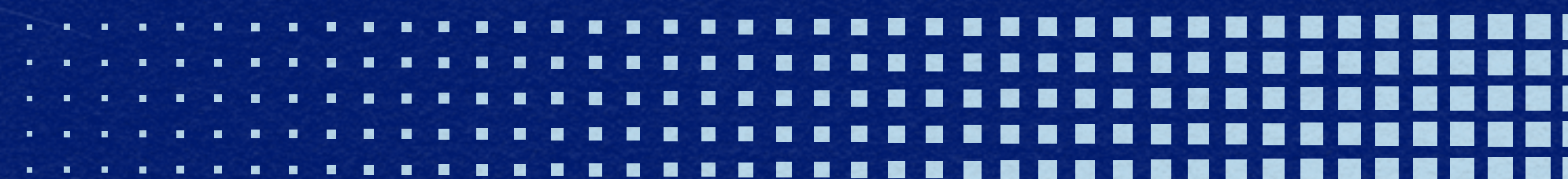
Trailblaze the future of the sport through the unparalleled US sports and entertainment DNA.

## **5. A community affair.**

Leverage the inclusive fan and stadium experience by using soccer as a positive space for brands.

## **6. Foster multinational (soccer) pride.**

Celebrate the diversity of soccer in the US by paying attention to different nations with different soccer cultures and characters. Emphasize the rich heritage and achievements of the sport inclusively.



# JOGA BONITO

This report opens the conversation on the awesome commercial potential of the soccer market in the United States over the next decade. Sports Innovation Lab and JvM are passionate about growing the game in the United States and about guiding businesses to authentically activate with soccer.

However, the nascent opportunity with soccer in the United States is not just about commercial growth—though commercial investment, likely more than any other factor, will propel the market. The US market presents a rare opportunity to contribute to building a sports fan culture. But very soon, the Fanarchy of soccer fandom in the United States will concretize into traditions. The big opportunity is about actively working to create an idealized sporting culture as we wish it to be: inclusive, welcoming, safe, and celebratory. We all—brands, leagues, teams, federations, and fans—have a role to play in this project.

Soccer has been affectionately referred to as “the beautiful game” because of its wild unpredictability; the skill and grace of icons like Pele and Hamm; and the excitement of seeing new generational talents, like Messi and Kerr, raise the game. But beauty is not just in performance. It is in the collective power of fans unified around love for a sport, regardless of team affiliations or national identities. Beauty is seeing oneself in others, as the many young players saw themselves in the ‘99ers during their historic win. Beauty is the fierceness of competition making way for an embrace between opponents at the final whistle.

Let’s build a game that is as beautiful off the field as it is on.



Joga Bonito,  
Sports Innovation Lab  
Jung von Matt SPORTS

## CONTACT INFO:

**Sports Innovation Lab** is a data and research company helping the sports industry to revolutionize business growth through fan intelligence and strategy.

### MEET WITH US

Curious to learn more about how Sports Innovation Lab can help you better understand who your fans are? Drop us a line!

[info@sportsilab.com](mailto:info@sportsilab.com)

**Jung von Matt SPORTS** is Europe's most awarded creative agency in sports—based in Hamburg and Los Angeles.

We work for brands, advertisers, associations, clubs, athletes, publisher, start-ups and NGO's. Moreover, Jung von Matt SPORTS is a proud supporter and partner of Common Goal—the world's leading non-profit collective in soccer. We play to make sports a better business.

### MEET WITH US

Curious to get in touch with Jung von Matt SPORTS? Feel free to contact us.

[sports@jvm.de](mailto:sports@jvm.de)

## ENDNOTES

**1** Todos Os Corações Do Mundo). Streaming. A Sport Target Media Productions, 1995.

**2** Sports Innovation Lab, 2022, n=1500 US-Based Respondents

**3** City News Service and By City News Service. "World Cup Final Draws Record Ratings but NFL Coverage Still Wins the Week - Los Angeles Times." Los Angeles Times, December 22, 2022. <https://www.latimes.com/entertainment-arts/tv/story/2022-12-21/tv-ratings-story-for-the-week-of-dec-12-18-wed-dec-21-2022>.

**4** <https://data.census.gov/>

**5** Sports Innovation Lab, n=1500, 2022

**6** Nielsen, What Fans Want: The 2022 World Football Report. New York, The Nielsen Company (US), LLC., 2022.

**7** "One Month on: 5 Billion Engaged with the FIFA World Cup Qatar 2022™." FIFA. Accessed February 27, 2023. <https://www.fifa.com/tournaments/mens/worldcup/qatar2022/news/one-month-on-5-billion-engaged-with-the-fifa-world-cup-qatar-2022-tm>.

**8** Gallup. "Sports." Gallup.com. Gallup, March 30, 2020. <https://news.gallup.com/poll/4735/sports.aspx>.

**9** "FIFA World Cup 2022 to Be a Magnet for Emerging Soccer Fanbases in U.S., India, and China&nbsp;&nbsp;&nbsp;." Altman Solon, November 9, 2022. <https://www.altmansolon.com/insights/2022-fifa-world-cup-to-be-a-magnet-for-emerging-soccer-fanbases-in-u-s-india-and-china/>.

**10** Sports Innovation Lab, n=1500, 2022

**11** Ibid

**12** Thomas, Rhys. "The Rise of 'Blokecore', the Football-Inspired Style Trend." VICE, May 11, 2022. <https://www.vice.com/en/article/pkpnxb/what-is-blokecore-tiktok-fashion-trend>.

**13** Sports Innovation Lab, n=1500, 2022

**14** Szymanski, Stefan, and Silke-Maria Weineck. It's Football, Not Soccer (and Vice Versa): On the History, Emotion, and Ideology behind One of the Internet's Most Ferocious Debates. United States, 2018.

**15** Ibid

**16** Harris, Christopher. "Spurs-Man City Is Second Most-Watched Game in US History." World Soccer Talk. World Soccer Talk, February 7, 2023. <https://worldsoccertalk.com/spurs-man-city-is-second-most-watched-game-in-us-history-20230207-WST-419027.html>.

**17** Paulsen. "Ratings: NASCAR, College Hoops, Soccer, NHL." Sports Media Watch, March 1, 2023. <https://www.sportsmediawatch.com/2023/02/nascar-auto-club-ratings-fontana-uva-unc-college-hoops-uefa-mls-nhl/>.

**18** For each of the five personas, these persona quotes are the exact phrases that survey respondents selected in the study.

**19** James Dator, "A Short History of the Banning of Women's Soccer," SBNation.com (SBNation.com, July 6, 2019). <https://www.sbnation.com/soccer/2019/7/6/18658729/banning-womens-soccer-world-cup-effects>.

**20** Dora Mekouar, "Why Us Men's Soccer Lags While Women Soar," VOA (Voice of America (VOA News), July 16, 2019), [https://www.voanews.com/a/usa\\_all-about-america-why-us-mens-soccer-lags-while-women-soar/6171961.html#:~:text=The%20world%20in%20general%20views,%2Doriented%2C%20overtly%20masculine%20game.](https://www.voanews.com/a/usa_all-about-america-why-us-mens-soccer-lags-while-women-soar/6171961.html#:~:text=The%20world%20in%20general%20views,%2Doriented%2C%20overtly%20masculine%20game.)

**21** Alexandra E. Petri, "Once an 'Easy Way out' for Equality, Women's Soccer Is Now a U.S. Force," The New York Times, June 27, 2022), <https://www.nytimes.com/2022/06/27/sports/soccer/title-ix-soccer.html>.

**22** Alexandra E. Petri, "Once an 'Easy Way out' for Equality, Women's Soccer Is Now a U.S. Force," The New York Times (The New York Times, June 27, 2022), <https://www.nytimes.com/2022/06/27/sports/soccer/title-ix-soccer.html>.

**23** Alexandra E. Petri, "Once an 'Easy Way out' for Equality, Women's Soccer Is Now a U.S. Force," The New York Times (The New York Times, June 27, 2022), <https://www.nytimes.com/2022/06/27/sports/soccer/title-ix-soccer.html>.

**24** Alexandra E. Petri, "Once an 'Easy Way out' for Equality, Women's Soccer Is Now a U.S. Force," The New York Times (The New York Times, June 27, 2022), <https://www.nytimes.com/2022/06/27/sports/soccer/title-ix-soccer.html>.

**25** Abigail J Hess, "US Viewership of the 2019 Women's World Cup Final Was 22% Higher than the 2018 Men's Final," CNBC (CNBC, July 10, 2019), <https://www.cnbc.com/2019/07/10/us-viewership-of-the-womens-world-cup-final-was-higher-than-the-mens.html>.

**26** Abigail J Hess, "US Viewership of the 2019 Women's World Cup Final Was 22% Higher than the 2018 Men's Final," CNBC (CNBC, July 10, 2019), <https://www.cnbc.com/2019/07/10/us-viewership-of-the-womens-world-cup-final-was-higher-than-the-mens.html>.

**27** Tom Hamilton and Caitlin Murray, "FIFPRO Calls for FIFA to Equal Prize Money, Conditions at Men's and Women's World Cup," ESPN (ESPN Internet Ventures, March 15, 2023) <https://www.espn.com/soccer/fifa-womens-world-cup/story/4901416/fifpro-calls-for-fifa-to-equal-prize-moneyconditions-at-mens-and-womens-world-cup>.



**FANARCHY26**

# FANARCHY 26



**FANARCHY26**



FANARCHY FANARCHY



FANARCHY FANARCHY



**FANARCHY26**

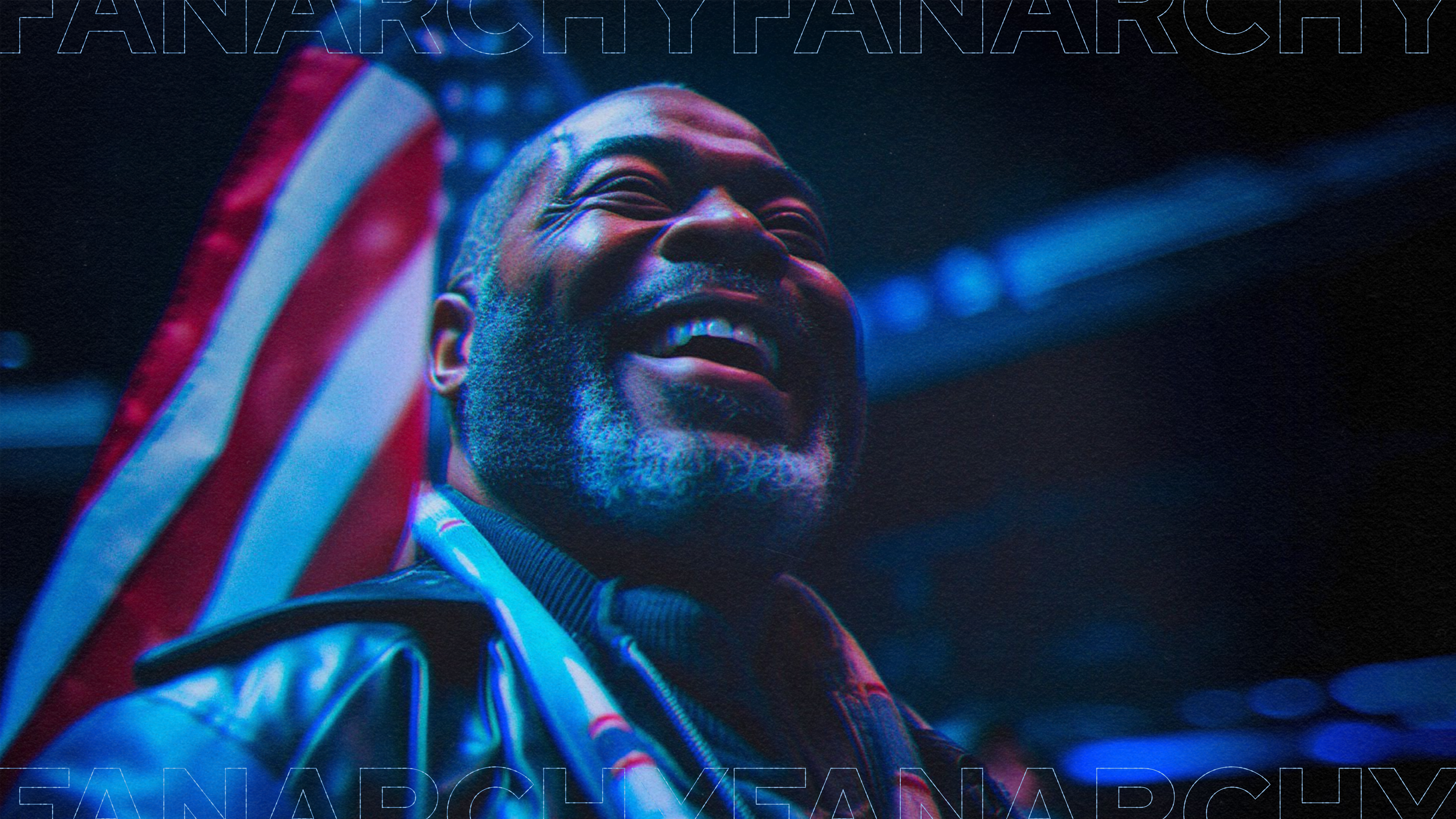




FANARCHY26



FANARCHY FANARCHY



FANARCHY FANARCHY







**FANARCHY**



**FANARCHY**

FANARCHY



FANARCHY



FANARCHY



FANARCHY



FANARCHY  
FANARCHY  
FANARCHY  
FANARCHY  
FANARCHY  
FANARCHY  
FANARCHY  
FANARCHY



**Sports  
Innovation  
Lab**



**JUNGvMATT**  
SPORTS