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PLAYFLY SPORTS FANSCORE:

**REFRAMING THE LOCAL
SPORTS OPPORTUNITY**

TABLE OF CONTENTS

EXECUTIVE SUMMARY 03

LOCAL SPORTS, AMERICA'S MOST TRUSTED FAN CONNECTION 04

INNOVATION IS REDEFINING REACH 05

THE LOCAL FAN IS THE PAST, THE PRESENT, AND THE FUTURE 06



EXECUTIVE SUMMARY

Live local sports are entering a new era. While changing media distribution models are giving some advertisers cold feet, the value of local sports is unchanged. In fact, new distribution models, paired with technological innovations in live broadcasts, are creating a unique opportunity for advertisers to reach the most valuable audiences. At a time when ROI is difficult to achieve due to marketplace saturation, live local sports provide a unique opportunity to drive impact.



LOCAL SPORTS, AMERICA'S MOST TRUSTED FAN CONNECTION

Local sports fandom remains the cultural and commercial heartbeat of American sports. From the “Harry Caray effect” (famous baseball announcer who coined the “Take Me Out to the Ball Game” 7th inning tradition in Chicago) to hometown viewing traditions across the country, regional broadcasts aren’t just entertainment, they are community rituals. Sports-watching is a congregating force, and even fans know it: over 55% of them say their team affinity makes them feel like they belong to their community.¹

As a major component of community, it makes sense for sports to be watched and appreciated locally first. 63% of all regular-season MLB, NBA, and NHL viewership happens on local broadcasts,² and new distribution models are not changing that; they are only giving viewers more flexibility to watch their teams. Meanwhile, local broadcasts continue to deliver the same passionate, consistent, and highly rated audiences. Why? Because within local sports viewership lies a demographic of fans that overdelivers by all metrics. Playfly has coined them as Forever Fans.³

The Forever Fan identifies their fandom as a major part of who they are and claims to have become a fan before the age of 17. This person is passionate about their sport, and their fandom makes them over-index on key consumer metrics. The Forever Fan watches their team day in and day out regardless of their team’s performance and is 92% more likely than the general population to remember an advertiser that sponsors their favorite team. Beyond brand recognition, their attentiveness translates into action: Forever Fans are 26% more likely than general sports fans to take action after seeing sports sponsorships. They also act as an influencing force in their communities. 54% of them claim “People come to me for advice on what products to buy,” 49% more than the general population.⁴

With this in mind, Forever Fans don’t let distribution changes affect them. 66% claim to use “every possible medium” to stay connected to sports, twice as likely as the general population. Through the evolution of radio, TV, and now digital viewing, Forever Fans have consistently shown up on game day.

¹ Vision Insights Decoder, Aug 2024 - July 2025 dataset, USA, Persons 13+, sports fan = level of interest in sports is 2-7 on a 7-point scale.

² Nielsen (Npower Ratings Analysis), MLB/NBA/NHL season (MLB 2024, NBA/NHL 2023-24), P18-49, LSD viewing; Nielsen, NSI Projected to HTS Coverage Universe Estimate

³ The Forever Fan is defined as an individual who agrees with the statement “my love of sports is a major part of who I am as a person” and who became a fan of one or more sports leagues before the age of 17, according to data collected across NBA, NFL, NHL, WNBA, NWSL, MLB, NASCAR and MLS fans.

⁴ Vision Insights Decoder, Aug 2024 - July 2025 dataset, Forever Fan indexes to the P13+ general population and P13+ general sports fan.

INNOVATION IS REDEFINING REACH

The sportscast was born in 1936 during the Berlin Olympics and by 1939, the first college basketball and MLB games were televised. As demand rose, broadcasts became more accessible, and by 1960, televisions were a staple item owned by 90% of households in the U.S. As television became America's preferred form of entertainment, pay-TV models developed along with Regional Sports Networks (RSNs), which gave fans access to local games that were not always nationally televised. While this audience segmentation by local and national channels could have reduced overall viewership, the added option of local networks for sports fans only made sports more accessible, increasing the market size and solidifying sports fandom as a cultural staple in America.

Today, a similar technological shift is taking place. The rapid adoption of Direct-to-Consumer (DTC) offerings is fundamentally reshaping how fans connect with their favorite teams and how advertisers reach those fans in meaningful and targeted ways. With more than 80 million U.S. households projected to forgo traditional pay-TV by 2026, leagues, teams, and regional sports networks are increasingly embracing DTC platforms to eliminate friction and meet audiences where they are. The optionality offered by these platforms is translating into a broader, albeit more segmented, audience, and again, depicting viewership as a downward trend. While this shift is causing audience fragmentation, overall viewership is steady, and fans being able to watch on their own terms means deeper penetration for teams and for the brands along for the ride.

Innovation has spurred the rising value of local broadcasts. They're increasingly creative, immersive, and technologically advanced – often surpassing national coverage in viewership, relevant storytelling, and fan experience. Upgrades in camera technology, like Ump Cam, Wire Cam, and shallow depth-of-field shots, are delivering cinematic perspectives that bring fans closer to the action. At the same time, augmented viewing options are becoming more common, including real-time graphic overlays, AR-enhanced stats, alternate commentary feeds, and educational STEMcasts tailored for younger audiences.

Broadcasts are also evolving in format, with many regions experimenting with alternate telecasts modeled after the success of national examples like ESPN's "Manningcast" on Monday Night Football. These local versions feature personality-driven hosts, sports betting integrations, or youth-focused themes, offering fans new ways to engage. Beyond the primary screen, broadcasters are producing content for social platforms and mobile devices, creating short-form clips and highlights designed for easy sharing and second-screen consumption.

Across the board, outlets like NESN, Monumental Sports Network, and FanDuel Sports Network are proving that local doesn't mean limited. These innovations reflect a clear shift toward fan-first storytelling that is flexible, platform-savvy, and deeply aligned with how modern audiences consume sports.

On any given night, regional sports broadcasts can collectively reach more than five million viewers. With over 8,000 local games aired each year, the scale and frequency of these touchpoints are unmatched across most other forms of entertainment.

THE LOCAL FAN IS THE PAST, THE PRESENT, AND THE FUTURE

Forever Fans, whether they tune in at a bar with friends, on TV at home, or on their phone while on the go, will consistently be there to root for their team. They will consistently be more likely to recognize a brand and engage with it after seeing it associated with their team, and this remains true across local viewing channels. No other audience is as consistent and reliable, and brands are starting to notice.

In 2024, U.S. sports rights reached a total valuation of \$29.5 billion, with projections exceeding \$34 billion by 2027. Meanwhile, streaming platforms alone spent \$10 billion on sports rights in 2024, a steep increase from just \$2.8 billion five years earlier. These figures underscore a growing understanding in the market: local sports drive loyalty, and loyalty drives results. Brands now recognize that reaching local fans means tapping into passion, community, and purchasing power—all in one place.

Uniquely positioned to tap into the Forever Fan, Playfly Sports provides local reach at a national scale for brands looking to maximize ROI. Contact us at www.playfly.com/contact/ to learn more.



Playfly Sports, the sports industry's leading revenue maximization company, drives growth for its partners across the sports ecosystem – including 2,000+ brands, 100+ professional teams, 65+ college athletic departments, all U.S. local sports networks and associated streaming platforms, and other marquee properties. Its fan engagement platform allows its partners to reach and engage over 85% of all U.S sports fans. Playfly builds and implements custom strategies across media, sponsorship, premium experiences, ticketing and fan engagement offerings through proprietary data, innovative technology and compelling storytelling. Playfly operates an expansive portfolio of services with a data-driven and fan-focused approach to maximize revenue yield in key growth areas, such as media, sponsorship, ticketing, premium experiences and fan engagement offerings. Founded in September of 2020, Playfly Sports is now home to approximately 1,000 team members located across 43 U.S. states and internationally dedicated to maximizing the impact of highly passionate local sports fans. The company has been named a *Best Place to Work in Sports* by Sports Business Journal, Front Office Sports, and Newsweek. To learn more, follow Playfly Sports on social media platforms or visit www.Playfly.com.