



PLAYFLY

FANSCORE

POWERED BY  VISION INSIGHTS

MLB EDITION

2023

INTRODUCTION

In the realm of American sports, few traditions run as deep as the timeless allure of Major League Baseball (MLB). It is a beloved pastime that holds unique differences compared to its fast-paced contemporaries like the NFL, NHL, and NBA. We have recently uncovered a compelling narrative that defies any prevailing notions and showcases the sport's true magnificence.

At the heart of this narrative lies an astounding truth: Major League Baseball stands as one of the most popular and cherished sports in the United States, with an incredibly devoted fan base that stretches far and wide. This article seeks to shed light on the often-overlooked aspects that make baseball an enduring cultural phenomenon, challenging perceptions, and celebrating the sport's unwavering popularity.

Join us as we explore the intricacies of Major League Baseball, transcending the misconceptions, and discovering the true essence of its underrated popularity. Through in-depth analysis and captivating insights, we aim to offer a newfound appreciation for this great American pastime, showcasing why MLB is so much more than meets the eye.



A DEEPER LOOK INTO MLB'S UNDERRATED POPULARITY

#2 IN NATIONAL POPULARITY AFTER NFL

While the NFL has been the most popular league for at least a decade, second place is still hotly debated. Major League Baseball, however, remains an incredibly successful, widely beloved league, firmly placed as the second most popular professional sport in the United States. With over 170 million fans, MLB enjoys a strong fanbase that continues to grow globally.

NFL 188.4 MILLION
MLB 171.1 MILLION
OTHER PRO LEAGUES
155.9 MILLION AND UNDER

Source: Vision Insights

#1 IN ANNUAL ATTENDANCE

MLB attendance figures are staggering.

The average MLB game is currently drawing 29,266 fans in the 2023 season, a +9.11% increase from last year at this time.

That's 65 million fans watching 2,430 games from April to October.

65 MILLION FANS =

ROUGHLY THE ENTIRE POPULATION OF FRANCE



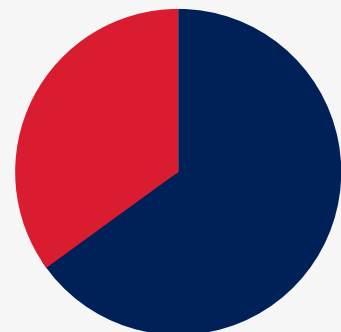
65 MILLION FANS =

50% MORE THAN THE NBA ATTENDANCE (22.2 MILLION) AND NHL ATTENDANCE (18.8 MILLION) COMBINED.

MORE REGULAR SEASON VIEWING

REGULAR SEASON TOTAL GROSS RATING POINTS BY SPORT

ALL NBA + NHL
35%



ALL MLB
65%

Source: Nielsen (Npower Ratings Analysis), MLB, 4/07/2022 - 10/05/2022; NBA, 10/18/2022 - 04/09/2023; NHL, 10/07/2022 - 04/15/2023, P2+, LSD viewing. National Competition defined as: NBA - ABC/TNT/ESPN. NHL - ESPN/TNT/ABC. MLB - ESPN/FOX/FS1/MLBN/TBS; Nielsen NSI LSD Projected to HTS Estimated Coverage Universe, P2+

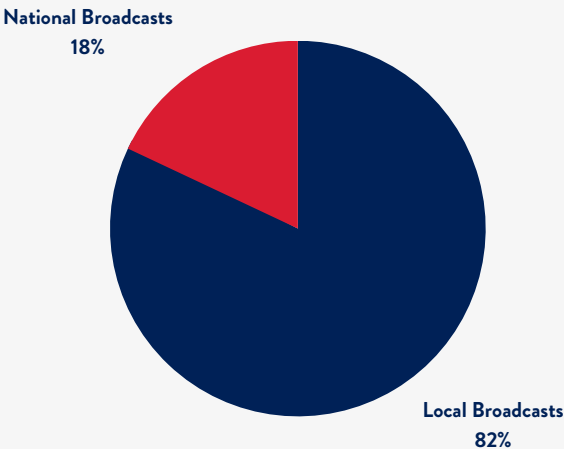
WHAT MAKES MLB FANS DIFFERENT?

MLB VIEWING IS DRIVEN BY TEAM PASSION

MLB is local, and that makes for deeper, more authentic connections. Talk to a fanatic in your neighborhood. You know who they are: the fans who camp out for tickets and never wash their lucky jersey. They will undoubtedly have an opinion favoring their local sportscasters over the national broadcast team. Joe Buck may have been known as a voice of the World Series, but Gary, Keith, and Ron are etched into the minds of Mets fans, and no one can live up to the likes of Vin Scully in LA. For baseball fans, local means something, and that makes them different.

MLB local broadcasts deliver 82% of all regular season viewing according to Nielsen.

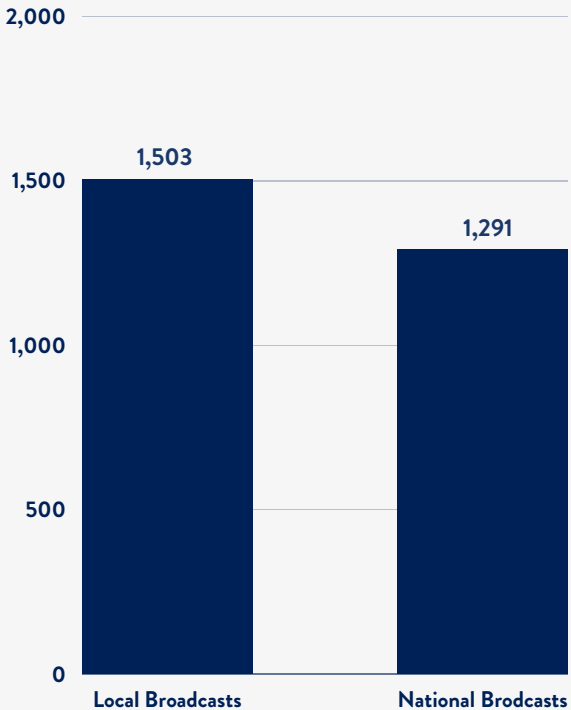
SEASON TO DATE % SHARE OF GRPS



Source: Nielsen, Live + SD, MLB Persons 25-54, 03/30/23 - 05/28/23

MLB’s national audience for its local broadcast surpasses ESPN’s audience by more than triple and surpasses the average broadcast primetime entertainment programming of the “big 4” networks by over two times.

MLB P25-54 TV IMPRESSIONS BY NETWORK



Source: Nielsen, Live + SD, MLB Persons 25-54, 03/30/23 - 05/28/23

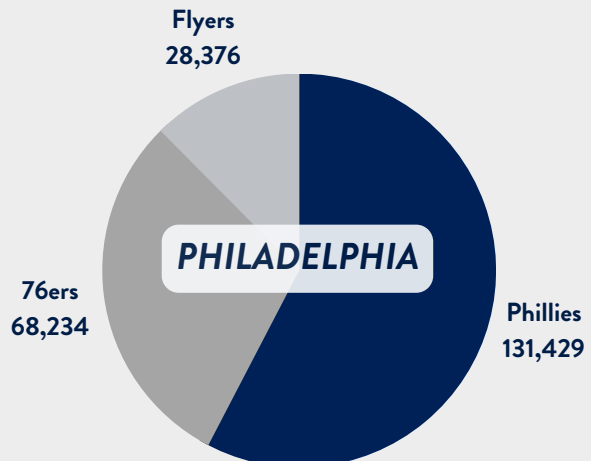
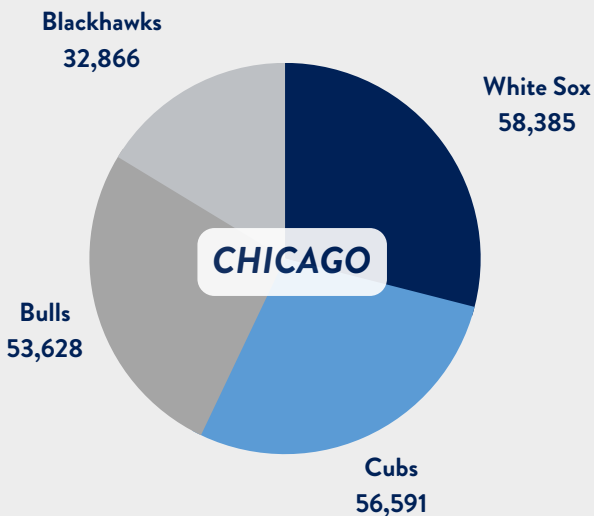
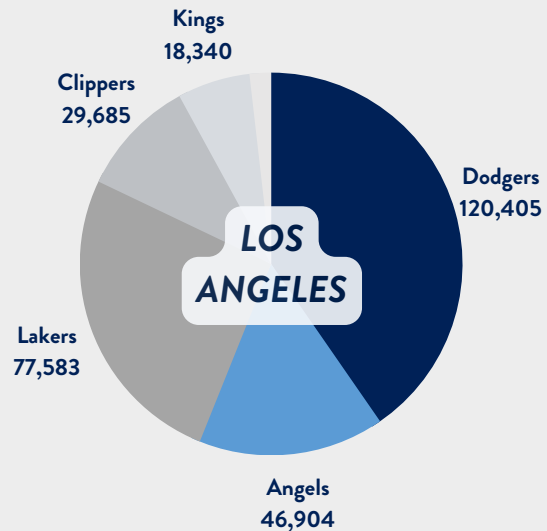
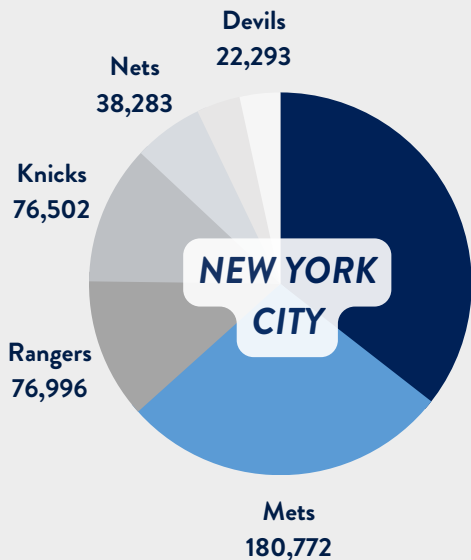
As you can see, MLB national ratings tell an incomplete story about MLB’s popularity.

For example, ESPN’s Sunday Night Baseball was ranked 61st among programs in the New York market during the 2022 MLB season. In stark contrast, local broadcasts of the Yankees on YES and Mets on SNY ranked 10th and 12th, respectively.

The gap in viewership only widens when we look at additional markets like Los Angeles, Chicago, and Philadelphia. Per game viewership for the Mets and Yankees combined

is more than the combined viewership of Knicks, Rangers, Nets, Devils, and Islanders. The same relationship holds true in LA, Chicago, and Philly.

SHARE OF DMA AUDIENCE BY TEAM (HOUSEHOLDS)



Source: Nielsen NSI, Live + SD, TV household Impressions in NY, LA, CHI and PH.

MLB FAN JOURNEY IS UNIQUE

How did MLB fans get here? What influenced them into fandom, and how old were they when they became a fan?

70% of MLB fans, 118.8 million, became fans of their team between 0-17 years old.

Compare that to the NFL (66%) and other pro leagues which rank lower. While MLB has a reputation for older fans, they attract more fans at a younger age than the other professional leagues.

Amateur sport also plays a factor in MLB fandom.

39% of all MLB fans became more interested in the League because they played baseball themselves.

Many young fans actively participate in little league games, fostering a personal connection to the sport as they learn the fundamentals and develop their skills. This hands-on involvement further deepens their attachment to the MLB and fuels their enthusiasm for following professional teams as they progress through their baseball journey.

MLB FANS LOVE TO REPRESENT THEIR TEAMS VIA MERCH

Merchandise is a major revenue source and great for brand awareness. Sometimes, a jersey can last decades and pass down from generation to generation. But plenty often, a new player or a new colorway will prompt fans to make a purchase online or at the game.

HOW MANY FANS PURCHASED MERCHANDISE IN THE PAST YEAR?



**26.7 MILLION
BASEBALL FANS**



**24.1 MILLION
BASKETBALL FANS**



**14 MILLION
HOCKEY FANS**

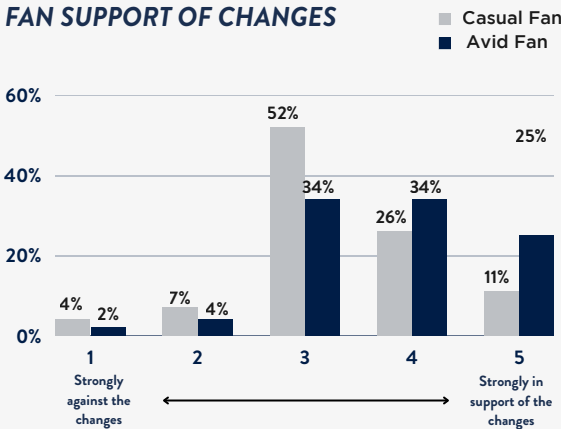
Source: Vision Insights

MAJOR RULE CHANGES IMPACT POPULARITY

FAN SUPPORT OF MLB RULE CHANGES

This season, we saw three major rule book changes and several new components that either complement the new rules or are part of routine updates to the game.

MLB fans are overwhelmingly on board with the changes. 59% of avid baseball fans and 37% of casual fans supported the changes; very few were against them. For every avid fan against these changes, ten avid fans are in support of them.



Source: Nielsen, Live + SD, MLB Persons 25-54, 03/30/23 - 05/28/23

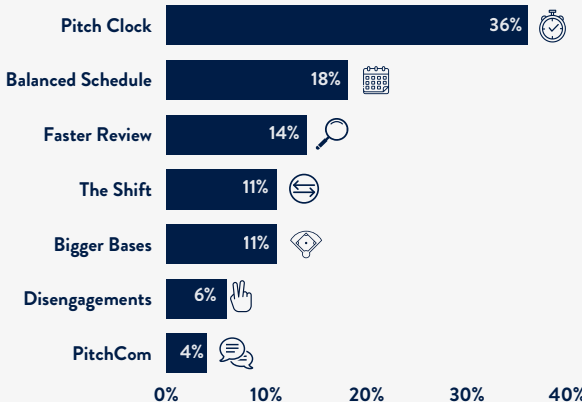
Additionally, for the first time ever, every team will have a series against the other 29 teams. As a result, divisional matchups were reduced from 76 games to 52. This new format means more exposure for smaller market teams and national

exposure to star players.

Fans are buying into it, with 66% of avid fans and 52% of casual fans feeling the schedule will be more enjoyable.

Through half the season, it's safe to say these rules have had a positive impact on the game. For instance, the pitch clock has the most influence on reduced game times. From a fan perspective, it also has the most positive impact on the game! Further, stolen base attempts are up, balls in play are up, and local ratings are up. All largely thanks to the rule changes.

RULE CHANGE THAT HAD MOST POSITIVE IMPACT



Source: Vision Insights

For everything MLB has done over the last few decades, the latest rules are a triumph. With the rewind of play-style that we haven't seen since the '80s, they've created a new product in 2023 that endears the sport to loyal and casual fans alike.

THE FUTURE OF MLB FANDOM IS BRIGHT

The rule change impact will surely be felt for years to come, especially to a group of fans that are younger, receptive to sponsorship, and advocates of the sport.

There is an undercurrent of fans in sports who drive engagement, attendance, and viewership. At Duke, fans know them as the face-painted Cameron Crazies. At Lambeau field, the most common hat for a Packers game is the cheese head. And in the Bronx, they're called Bleacher Creatures. These fans are everywhere, from small markets like Pittsburgh and St. Louis to top markets like New York and Los Angeles.



MEET THE FOREVER FAN.

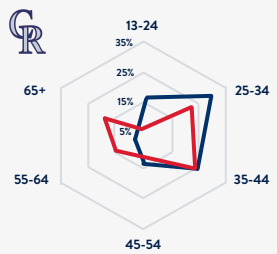
Forever Fans make the teams they root for part of their core identity. They bleed team colors, pass their fandom to the next generation, and are vocal advocates for the sport to friends and strangers alike. Their lifelong passion for their team starts early in life, between the day they're born and the day they turn 18. And they tune into every single game.

Forever Fans were found to be 2.5 times more likely to watch every single game their team plays. Most importantly, Forever Fans are three times more likely to connect emotionally with their team's sponsors, visit those advertisers' apps or websites, and make a purchase from a brand aligned with their favorite team.

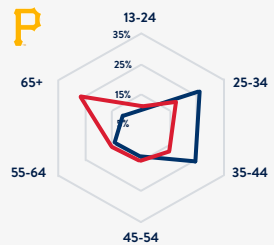
Why is the Forever Fan an integral part of baseball's bright future?

Forever Fans are younger. While performance varies by team, Forever Fans are typically under 44 years old in small and large markets alike.

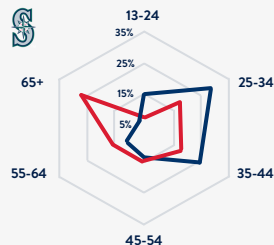
SMALL MARKET TEAMS



Rockies Forever Fan (Blue line), NOT a Rockies Forever Fan (Red line)

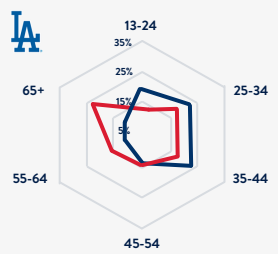


Pirates Forever Fan (Blue line), NOT a Pirates Forever Fan (Red line)

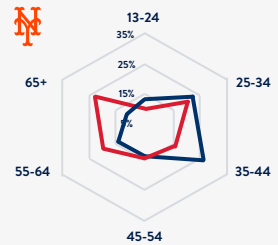


Mariners Forever Fan (Blue line), NOT a Mariners Forever Fan (Red line)

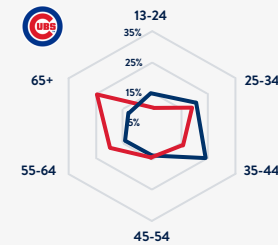
LARGE MARKET TEAMS



Dodgers Forever Fan (Blue line), NOT a Dodgers Forever Fan (Red line)



Mets Forever Fan (Blue line), NOT a Mets Forever Fan (Red line)



Cubs Forever Fan (Blue line), NOT a Cubs Forever Fan (Red line)

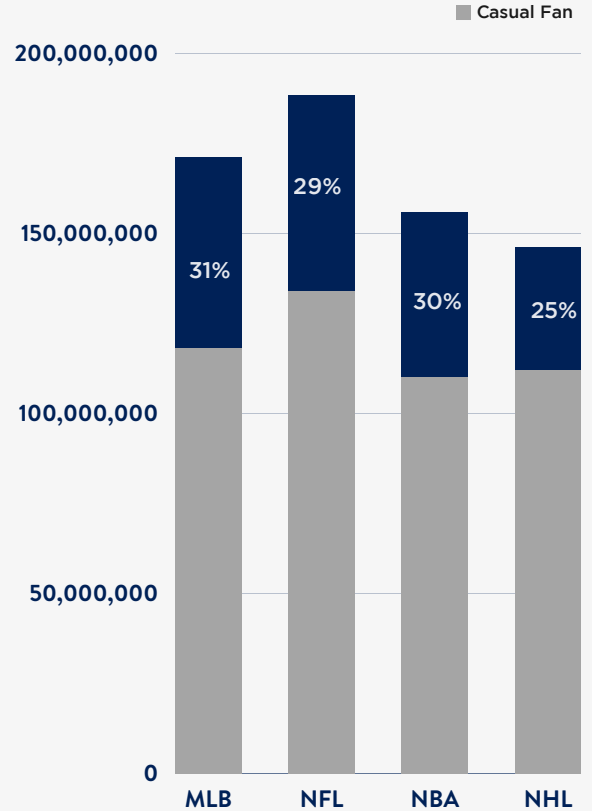
Source: Vision Insights

MLB also has a higher concentration of Forever Fans than any other league. MLB's cohort of Forever

Fans is less than 2 million people short of the NFL.

Considering that the NFL has 17 million more fans than MLB, you can quickly understand that baseball's local fanbases should not be overlooked.

CONCENTRATION OF FOREVER FANS



Source: Vision Insights


MLB FANS ARE A VALUABLE AUDIENCE FOR MARKETERS

MLB fans are tuned in, social, look for new experiences, and take risks.

Sports and the teams they follow are a part of who they are. This makes them ideal ambassadors for brands that align with fans at a local level.

In fact, 62% of MLB Local Broadcast Viewers “take action after seeing a brand’s sponsorship with the league, team or player,” 27% more likely than Casual MLB Fans.

PASSION OF LOCAL SPORTS FANS

| STATEMENTS AGREED WITH ABOUT SPORTS | LOCAL VIEWERS | CASUAL FANS | INDEX |
|--|---------------|-------------|-------|
| I use every possible medium to stay connected to sports. | 47% | 25% | 188 |
| My love for sports is a major part of who I am as a person. | 59% | 34% | 174 |
| Every time I talk to my friends, I bring up sports. | 43% | 22% | 195 |
| I take action after seeing a brand’s sponsorship with league, team, or individual.  | 62% | 49% | 127 |
| I will watch as many games as possible in a league’s season. | 64% | 39% | 164 |
| I have a Gameday ritual. | 86% | 74% | 116 |

Source: Vision Insights

HOW TO ACTIVATE MLB FANS

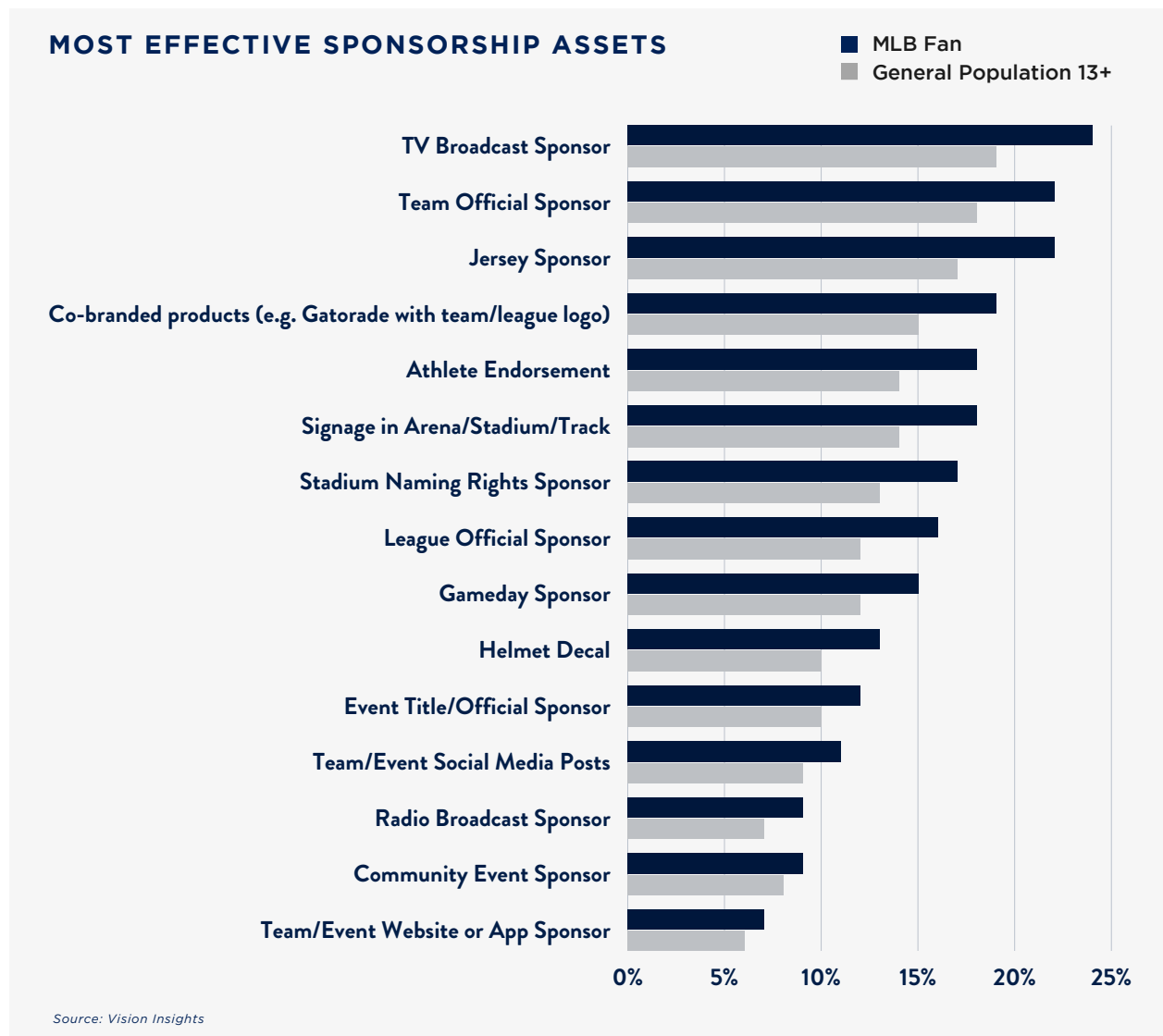
So, how can brands activate MLB fans and improve the ROI of their sponsorship spend?

Well, these fans use every possible medium to keep up with their teams,

28 million MLB fans check league websites weekly, 30.6 million follow

their team on social media, and another 24 million tune into sports podcasts.

An omnichannel approach from local telecasts to social touchpoints and gameday activations will effectively align sponsors and advertisers with the home team crowd.



PLAYFLY FAN SCORE

Marketers who are ready to leverage the full power of MLB advertising need to focus on local fans to activate the Home Team Fan who doesn't miss a game.

So, are you ready to leverage the hidden value of Major League Baseball?

Get the most out of your advertising spend by activating the audiences that bring the most value with the Playfly Fan Score.



INTRODUCING THE PLAYFLY FAN SCORE

The Playfly Fan Score (PFS) is the first actionable and insightful sports ranking index geared to marketers and sports business leaders. Playfly PFS is a fresh perspective to understanding fan value based on our proprietary factors:

- **Fan Passion**
- **Fan Receptivity**
- **Fan Marketplace**

Rankings shouldn't be up for debate when it comes to business analytics. That's why we partnered with [Vision Insights](#), leaders in sports sponsorship measurement, to develop a custom algorithm to quantify fandom and sponsor performance. Dig into our Playfly Fan Score: MLB Edition and see who comes out on top.

HOW WE TALLY THE SCORE

The Playfly Fan Score is a composite of three proprietary metrics measuring passion, receptivity, and demand. The index includes public

data, Playfly's Home Team Sports RSN market data, and Vision Insights sponsor data. Contact us for more information about our methodology.

FAN RECEPTIVITY

Fan Receptivity Score is the measure of a fan's responsiveness to advertising. We measure sponsor recall against actions taken as a result of team sponsorship. Fan Receptivity is powered by our teammates at Vision Insights.

FAN PASSION











Our Fan Passion Score measures fan engagement, participation, and commitment against team performance on the field and in the ratings. How do we measure intangibles like fan commitment? We use Vision Insights data to measure loyalty based on fan resiliency, despite their W/L record.

FAN MARKETPLACE

Fan Marketplace Score is a mix of advertiser demand data from Playfly's Home Team Sports (official sales agents for ALL Regional Sports Networks) and franchise value. It provides an industry first look at how teams are "valued" by marketers and investors.



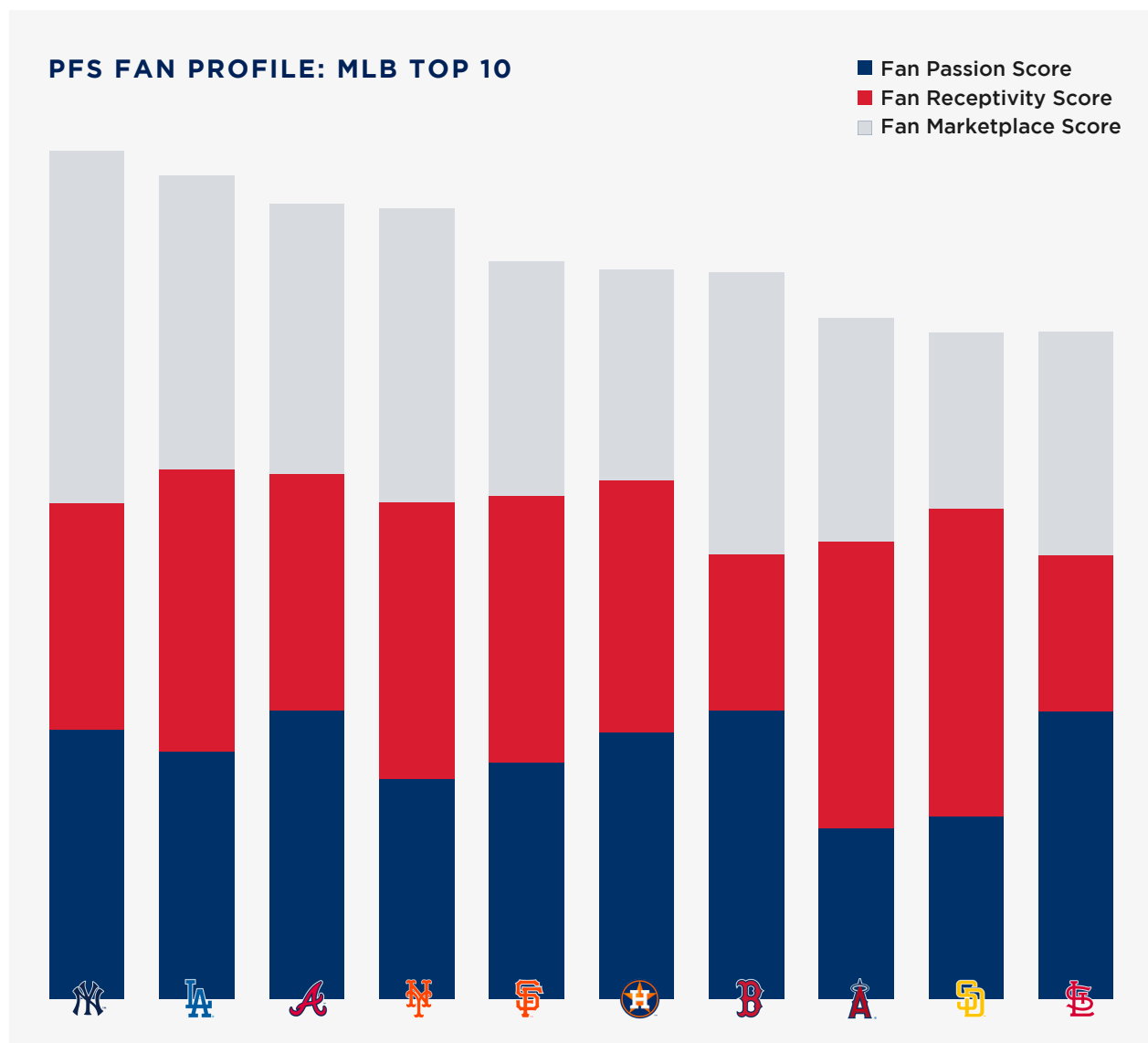
PLAYFLY FAN SCORE: MLB TOP 10

| RANKING | | TEAM | SCORE | INDEX |
|---------|---|----------------------|-------|-------|
| # 1 |  | NEW YORK YANKEES | 3.96 | 138 |
| # 2 |  | LOS ANGELES DODGERS | 3.87 | 135 |
| # 3 |  | ATLANTA BRAVES | 3.75 | 131 |
| # 4 |  | NEW YORK METS | 3.71 | 130 |
| # 5 |  | SAN FRANCISCO GIANTS | 3.49 | 122 |
| # 6 |  | HOUSTON ASTROS | 3.47 | 121 |
| # 7 |  | BOSTON RED SOX | 3.40 | 119 |
| # 8 |  | LOS ANGELES ANGELS | 3.22 | 112 |
| # 9 |  | SAN DIEGO PADRES | 3.18 | 111 |
| # 10 |  | ST. LOUIS CARDINALS | 3.15 | 110 |

PFS FAN PROFILE

Every team has a unique PFS Fan Profile. The diverse distribution of PFS factors shows us that sports are local. The nuance in every market is pronounced and proves that every team brings value, not only the Top 10. You just need to know where to look for it.





At Playfly, we adjust our custom algorithm according to the factors that matter most to our clients. We work with marketers to better understand their priorities and key objectives, uncovering the insights that make an impact.



RANKINGS DIFFER BY METRIC

We ranked the top five fan bases in each category and were surprised by the diversity of teams. It comes as no surprise that big market teams like the Yankees and Dodgers sit atop marketplace demand. But, it's

interesting to note that demand does not align with passion, and more importantly, receptivity. How can we dig deeper into this observation to deliver an actionable insight?

| FAN PASSION | FAN RECEPTIVITY | FAN MARKETPLACE |
|---|---|---|
|  ATLANTA BRAVES |  MIAMI MARLINS |  NEW YORK YANKEES |
|  BOSTON RED SOX |  SAN DIEGO PADRES |  LOS ANGELES DODGERS |
|  ST. LOUIS CARDINALS |  LOS ANGELES ANGELS |  NEW YORK METS |
|  CHICAGO CUBS |  TAMPA BAY RAYS |  BOSTON RED SOX |
|  NEW YORK YANKEES |  LOS ANGELES DODGERS |  PHILADELPHIA PHILLIES |



ACTIONABLE INSIGHTS FROM THE PFS

Our rankings and the fundamental data that drives them produce actionable insights based on propriety market and sponsor receptivity data. Let's see how.

We were surprised to see the Padres and the Angels break into the Top 10. They fall in the middle of the road for Fan Marketplace and in the bottom third for Fan Passion. Their appearance is driven, however, by home runs in Fan Receptivity.

So we dove into Fan Receptivity to see what drives MLB sponsorship results. We wanted to find the common thread that put the Marlins and the Dodgers in the same conversation.

Our research shows that teams with a highly receptive fan base also rank high in percentage of Hispanic fans.

In Latin America, baseball is everything. Just take a look at the 2023 World Baseball Classic. Miami hosted the quarter-finals, semis, and championship game this year.

[Attendance at the matchup between Puerto Rico and Nicaragua](#) was a staggering 35,399. The powerhouse matchup between Dominican Republic and Venezuela? A few hundred more at 35,890. Anecdotally, it's understood that Hispanics are passionate about baseball.

| | FAN RECEPTIVITY RANKING | % HISPANIC FAN RANK |
|---|-------------------------|---------------------|
|  MIAMI MARLINS | 1 | 1 |
|  SAN DIEGO PADRES | 2 | 4 |
|  LOS ANGELES ANGELS | 3 | 3 |
|  TAMPA BAY RAYS | 3 | 12 |
|  LOS ANGELES DODGERS | 5 | 2 |

MLB SPONSOR RECEPTIVITY DRIVEN BY HISPANICS

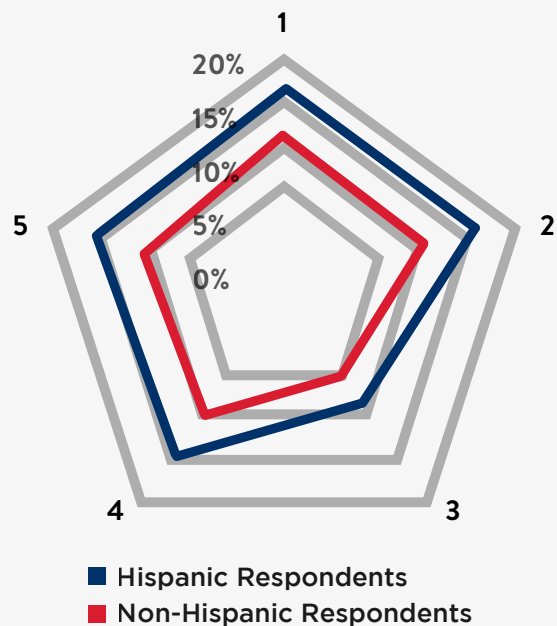
We wanted to confirm Hispanic fan receptiveness to sponsors, so our Vision Insights teammates crunched the data.

They found that Hispanic fans are more likely than non-Hispanic fans to:

- 1. LOOK UP THE SPONSOR BRAND ON SOCIAL MEDIA (+45%)**
- 2. GO TO THE SPONSOR COMPANY'S WEBSITE (+45%)**
- 3. GO TO THE SPONSOR COMPANY'S APP (+60%)**
- 4. PURCHASE THE SPONSOR BRAND'S PRODUCTS (+40%)**
- 5. TALK TO FRIENDS AND FAMILY ABOUT THE SPONSOR BRAND (+36%)**

The results are clear.

Teams with a high concentration of Hispanic fans have higher Fan Receptivity scores, and Hispanic fan preferences and receptivity to advertisement drive MLB sponsorship results.



WANT TO DIG DEEPER?

Our Playfly Fan Score only scratches the surface. Learn more about our Playfly Sports Consulting solutions.

Inside and outside the sports industry, clients look to Playfly to understand what makes fans tick. From consumer buying habits to values and motivators, we know fandom. Decision-makers in clubhouses, boardrooms, and newsrooms leverage our data

insights to uncover fan trends, preferences, and behaviors. Our data and analysis help them better understand the sports fandom landscape and deliver on business objectives.

Increase brand awareness, maximize ROAS, activate new audiences, and more with data-backed solutions from Playfly Sports Consulting.



FAN FOCUSED, DATA DRIVEN

Playfly Sports is a sports media, marketing and technology business centered around the team, league, brand, and network. Believing in 'Fandom as a Service' and focusing on a consultative, data driven approach to REACH, ENGAGE, MONETIZE AND MEASURE FANDOM gives the company's partners and brands a competitive advantage. Playfly connects more than 2,000 brand partners with approximately 83% of all U.S. sports fans. Through the proprietary platform the business delivers scalable, data-oriented marketing, technology, and media solutions with capabilities including exclusive MMR management, sponsorship sales and activation, streaming, consulting, ticket/premium sales, all along with new revenue-driving platforms and technologies.

Founded in September of 2020, Playfly Sports is now home to approximately 1,000 team members located across 43 U.S. states dedicated to maximizing the impact of highly passionate local sports fans.

Follow Playfly Sports on social media @PlayflySports or visit www.playfly.com



BRINGING FAN INSIGHTS INTO FOCUS

Vision Insights is a congregation of some of the most experienced sponsorship measurement professionals in the world. Their vision is to provide every marketer, rights holder and agency with the most complete resource for fan insights, consumer intelligence and sponsorship performance.