



synthesis

Soccer

IN FRAME



After World Cup 2026:

The Brand Playbook for Soccer's Growth Era in America



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The next five years are soccer's defining era in the U.S. The FIFA World Cup will accelerate demand, ripe for the MLS, NWSL, FIFA Women's World Cup and LA28 Olympic Games to leverage.

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U.S. soccer fans aren't a monolith. We've selected the five fastest growing groups and mapped their fandom to strategic entry points for brands — each with their own values, motivations, and brand opportunity.

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A deep-dive on the two audiences with the most upside for brands, what these fans care about and the playbook for brands to connect authentically in each.

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Synthesis can help your brand in 3 ways:

- I. Prioritize the right audience to pursue and how to win them over;
- II. Identify the right creators to partner with to optimize marketing spend and show up authentically;
- III. Measure partnership and sponsorship effectiveness through culture KPIs

The next five years will be the **defining era for soccer in the U.S.**, as the world's **biggest events converge on the Americas.**

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Ticket lotteries for FIFA World Cup 2026 set new records.

Netflix livestreams of the 2027 Women's World Cup in Brazil and 2031 in the U.S. will increase accessibility and eyeballs on women's soccer. And both the men's and women's games will benefit from the LA Olympics 2028.

The world's biggest spectacles will offer opportunities for brands to connect with a new, younger, generation of growth audiences.

But these opportunities will come with intense competition.

Brands looking to maximize the moment **must think beyond the fans they already know.**

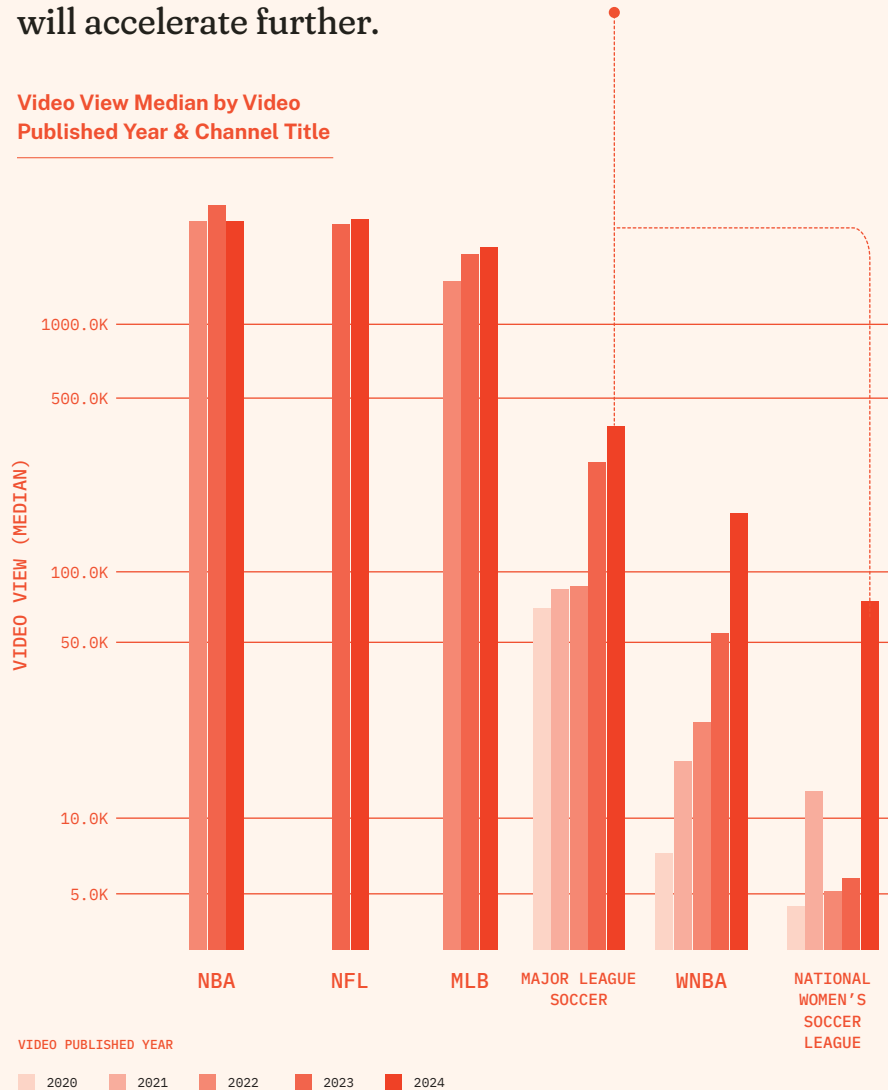
In these crowded cultural moments, the brands that win big will be the ones that truly understand who fans are, what they value, and what drives their passion. Those who don't, risk wasting the opportunity adding to the noise, or at worst, *fan-washing*.

This briefing is designed to help you prepare and win the post-FIFA World Cup soccer fandom growth in the U.S., across the MLS, NWSL, FIFA Women's World Cup and LA'28 Olympic Games.

U.S. soccer fandom is growing exponentially. Its momentum will rival leagues that have dominated for decades. FIFA World Cup 2026 will accelerate further.

MLS viewership on YouTube has climbed consistently from 2020 to 2024. The NWSL saw sharp gains still in 2024. And demand for the 2026 FIFA World Cup was record breaking, with the random selection draw oversubscribed more than 30 times.

Video View Median by Video Published Year & Channel Title



Median video views from 2020 - 2025 where full data is available.

Source & Graphic: Synthesis

More matches, more platforms, reaching more fans than at any point in U.S. history.

Soccer's move from niche to mainstream is driven by a dramatic expansion in access:

MLS Season Pass on Apple TV delivers every league match in one place for the first time in U.S. sports.

MLS and NWSL ticket prices remain significantly lower than those of the NFL, NBA, WNBA, and other major U.S. leagues, lowering the barrier for families, young fans, and first-time attendees.

Average Ticket Prices by League

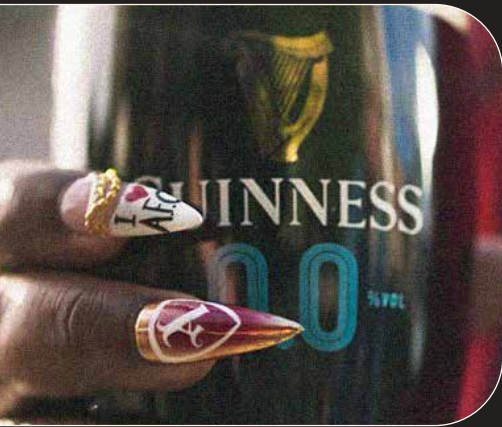


Source: Sports Acquisition | Graphic: Synthesis

Synthesis partners with the world's best brands to shape growth pathways into fandom and ensure maximum return on investment.

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GUINNESS



Guinness
x English Premier League

Synthesis partnered with Guinness 0.0 across the EPL to reach younger and female audiences in an emotionally resonant way.

Impact: By finding the human truth underneath real fans, the creative platform ladder to something bigger: unity, community and optimism in a moment of division.

NETFLIX



Netflix
x NFL Christmas Gameday

To grow NFL fandom beyond the U.S. Synthesis partnered with Netflix to explore the core and stretch audiences engaging with NFL Christmas Gameday: their entry points and how to activate them.

Impact: Designed a unique activation strategy for core vs. stretch audiences to appeal Netflix as the go-to for sports content.

WNBA



Synthesis
x WNBA

Synthesis decoded the growth of the WNBA against the shifting landscape of US Sports. The Triple Spectacle Model helps brands understand how to activate the experience around the game, and in culture, from fashion, to music and gaming.

Impact: Using our 'Triple Spectacle Model' Synthesis explored Women's Sport fandoms to give brands confidence regarding where and how they show up.



Liberty Media
x F1 Audiences

Partnered with Liberty Media to identify new entry points into F1 and sequence the growth opportunity beyond the core motorsport audience over a decade.

Impact: Liberty Media focused on partnerships outside of traditional motorsports to build relevance in wider culture. Today, F1 estimates that its female fans have increased to 41%.



▲
FROM

**To Grow,
Think *Beyond*
the Fans you
Know**

TO
▼



The Americas are about to be at the **center** of the global soccer universe.

The Opportunity: Cement long-term credibility and grow with soccer fans.

The Challenge: Intense competition.

Successful brands *must*:

Understand the *right* soccer audience to go after.

Soccer audiences are diverse, and have multiple entry points. Identifying the audience with the best fit for your brand is the key to maximizing the upside of partnering with a fandom.

Build relevance with unique authenticity.

Fans know when brands are just jumping on the bandwagon. Our deep empathy ensures you find a unique brand role within the fandom, show up where the fans are, and maximize investment.

An example of how Formula 1 was able to grow with Liberty Media by systematically targeting new audiences with Synthesis.

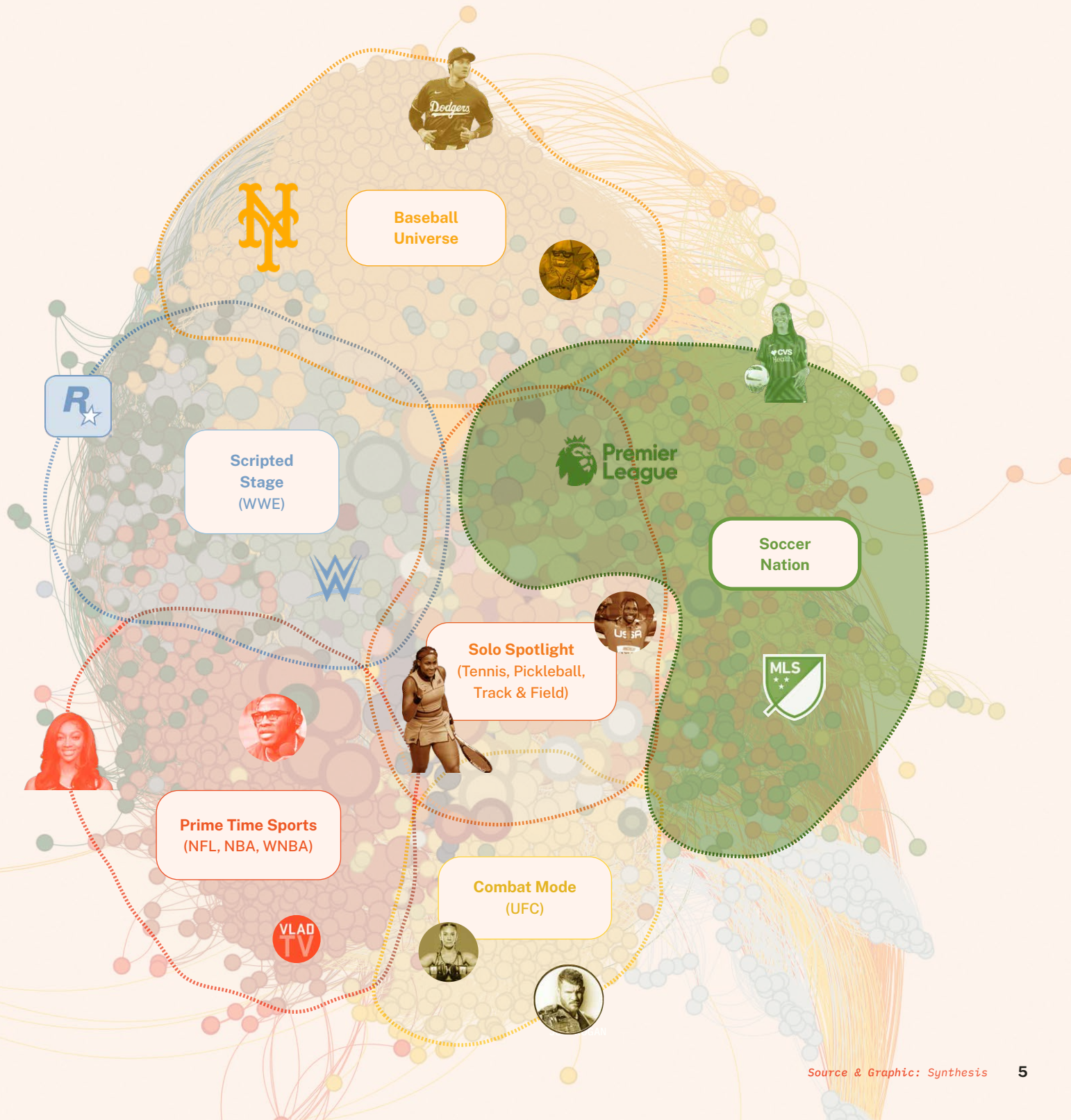
What makes soccer so unique from primetime sports in the U.S.?

The Synthesis Sports Landscape maps 2.3 million connections between the top sports channels in the U.S.

The data demonstrates that soccer occupies a distinct space, separate from the primetime orbits of basketball, football, and baseball.

Soccer today attracts a distinct audience compared to other primetime sports – and we can't assume they operate in the same way as all other sports fans.

The FIFA World Cup will draw eyeballs from primetime sports and wider culture. Brands can use the map to identify growth pathways to win with these new audiences.



US soccer fans are not a monolith.

U.S. soccer is a layered ecosystem, thriving across multiple leagues and communities, each with its own authority and influence.

Brands need to identify the right audience for them to go after in order to secure effective growth.

The American Soccer Vanguard 3M (stretch 37M)

A fast-growing, digitally native audience driven by visibility, local culture, and community, excited to help shape an emerging American soccer identity.

Opportunity to embed the brand in mainstream pop culture by aligning with the growing relevance of soccer to the needs of a young and diverse demographic.

EPL Pundits 17M (stretch 50M)

Fans whose attention and identity are shaped by Premier League media, with deep investment in club rivalries, transfer drama, and the UK's narrative-driven football culture.

Opportunity to build credibility with a small but deeply engaged group of purist fans who are only impressed by the highest level of play.

The Online XI 1M (stretch 22M)

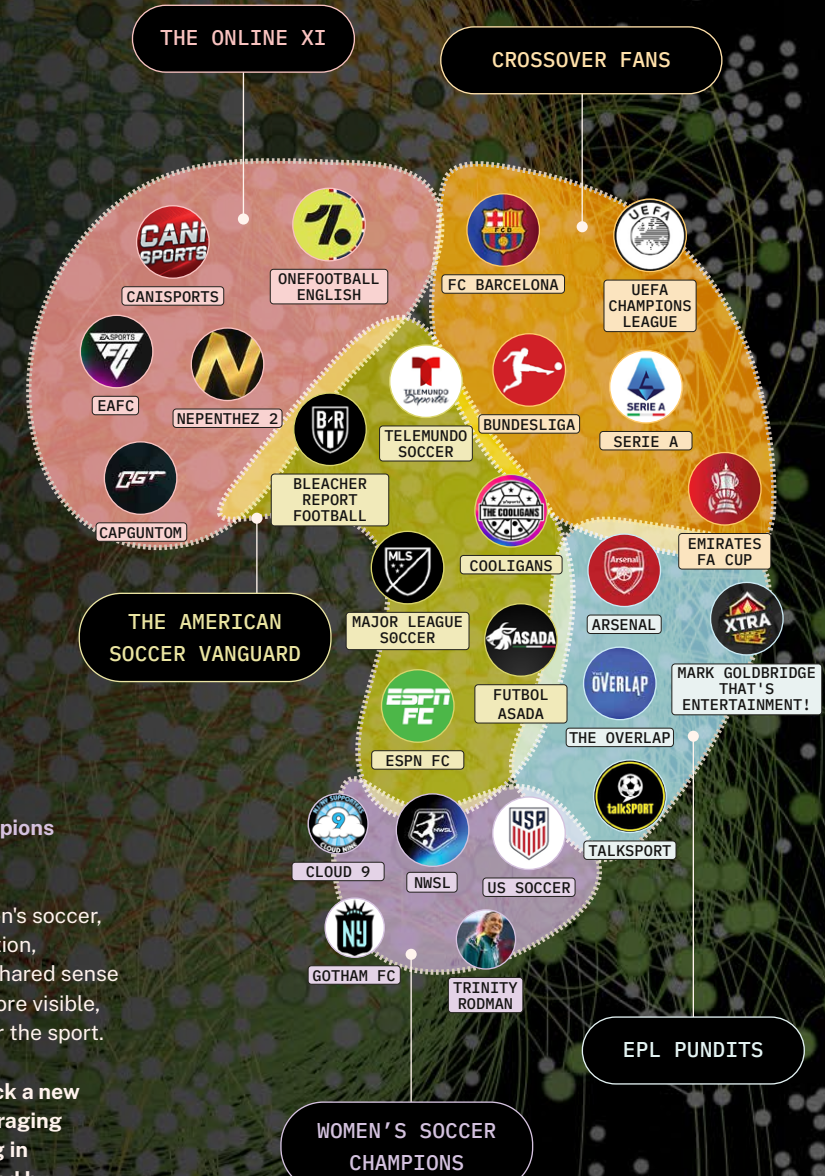
Digital-first soccer fans who come to the sport through gaming and creator culture engage with soccer as an interactive mix of gameplay, skills, stories, and online community.

Opportunity to lean into the intersection of sport x gaming to build relevance for the brand across multiple touchpoints.

Crossover Fans 13M (stretch 61M)

Traditional, broadcast-oriented soccer fans who follow the sport through official leagues and major media, valuing polished coverage, trusted storytelling, and star-driven narratives.

Opportunity to tap into the casual mainstream by offering a curated perspective on soccer in the US.



Selecting the right audience depends on how you plan to grow.

At **Synthesis**, we help brands identify the audiences that will shape their future with data-driven backed confidence. Identify the right targets for you based on metrics like size and reach, depth of fandom, cultural momentum, potential for your brand to add value and more.

AUDIENCE	SIZE & DEMOS	BRANDS THEY ENGAGE WITH	PRIORITIZE THIS IF YOU WANT TO...
The American Soccer Vanguard	3M (stretch 37M) MALE GEN Z MILLENNIAL US		Embed the brand into youth culture today.
English Premier League Pundits	17M (stretch 50M) MALE GEN Z EARLY 20S		Build credibility with the purist fans who live and breathe the sport, connecting to a more global audience.
The Online XI	1M (stretch 22M) MALE OLDER WORKING ADULTS		Tap into the intersection of sports x gaming to target audiences across multiple touchpoints.
Crossover Fans	13M (stretch 61M) MALE GEN Z EARLY 20S		Access a casual mainstream audience by leveraging the hype of soccer today.
Women's Soccer Champions	945K (stretch 14M) GENDER NEUTRAL LGBTQ+ CROSS GENERATIONAL		Unlock a new sports audience previously excluded by the male-dominated global soccer fandom.

Today, most brands aren't tapping into fandoms. They're *abusing* them.

It is a wasted opportunity to simply have a logo plastered on a kit or fieldside.

To cut through the noise and build sustained relevance with fans, brands need to play a unique role in the community.

To do this effectively, we need to understand these audiences deeply. By building empathy for their needs, motivations, and behavior — we can show up organically and naturally as part of the community rather than simply capitalizing on them.

fan-washing

/ˈfæn,wɒʃɪŋ/ noun

[mass noun]

The practice by which a brand associates itself with a sports team or fan culture — typically through heavy logo placement or surface-level sponsorship — without demonstrating a genuine understanding of, or earned connection to, the community or its values.

Example:

Supporters criticized the brand's campaign as fan-washing — an opportunistic move that ignored the history and spirit of the club.



The American Soccer Vanguard and Women's Soccer Champions both represent communities that are growing rapidly – but are also primed for brands to enter and elevate their experience.

Let's explore two opportunities in detail.

The American Soccer Vanguard



Size

3M

(stretch 37M)

FASTEST GROWING ↑

MALE

GEN Z

MILLENNIAL

US

1

This audience wants to feel like they're a part of the cultural zeitgeist.

It's less about the wins and losses, but about showing up with the drip, enjoying the music and being present with your people.

My Values

Community

I came to soccer through my community: Liga MX at home, a cousin who played, a local club that actually looked like my neighborhood. Now I follow MLS, USMNT, and whatever league has the best game on any given weekend. And I bring people with me. I share TikToks, gift jerseys, explain the offside rule without making anyone feel small. Soccer in America is still being written, and I'm part of that story.

Local Pride

Soccer sits at the intersection of everything I care about: music, gaming, streetwear, content. Bilingual chants, food trucks, tifos, drumlines, murals. This is what fandom looks like when it's actually ours. I don't need to inherit a tradition from somewhere else. We're building one here, and it reflects where I'm from.

Experience

The result matters, but it's not everything. What I'll remember is the energy, who I was with, how it felt to be in that moment. Looking right, feeling it, that's what I show up for. The experience around the game is as important to me as what happens on the pitch.

How To Win

Brands should play a more active role in the cultural spectacle to win with the **American Soccer Vanguard** audience.

They are protective of the culture they built and notice real investment versus brands that parachute in for the tournament.

Treat soccer as culture.

This audience values cultural currency, but most brands treat soccer like a niche sport rather than a cultural force.

Find your intersection with music, gaming and streetwear.

Unexpected crossovers like Travis Scott x *Barça* set the benchmark for what stands out with this group.

Earn your rights.

This audience is strongly rooted in the grassroots community, but as soccer grows, it risks becoming corporate and generic.

Modelo and *Topo Chico* built loyalty by treating Hispanic fans as the core audience years before it became strategically obvious. Commission the tifo or the mural. Make Spanish-first content with the same investment as English. The richness of these investments lands across the entire community.

Support the ritual.

This audience wants to feel like they're building something, but most brand activations sideline fans to passive viewers.

Brands that show up with core fans — amplifying the energy with chants, free scarves, flags, supporter sections — win credibility, especially when they show up consistently.



Women's Soccer Champions



2

Size

945K

(stretch 14M)

GENDER
NEUTRAL

LGBTQ+

CROSS
GENERATIONAL

They take inspiration from the success of the underdog.

They look up to women who lead by example, reaching the top of their game despite all odds.

My Values

Driven

I live and breathe sport. What draws me to women's soccer is the quality of play. The USWNT demonstrates what athleticism, intensity and competition look like at the top, and these athletes want it more than anyone in mainstream sport. That competitive grit carries through my life: running, basketball, yoga, the way I show up at work. High performance is a standard I hold myself to.

Together

No player is bigger than the team, and no fan is in this alone. I find strength in the squads and the people who have carried me through everything: my friends, family, the women who have unapologetically paved the way before me. Athletes, actors, leaders who reached the top against the odds. I'm here to support them.

Consistency

Only the people who put in the work get to feel the real joy of the win. Anyone can support a team once it's established. I want to be part of the journey now, backing a sport that's still proving itself, helping it become what it deserves to be. Being a fan right now feels like being on the right side of history.

How To Win

Women's Soccer Champions have the sharpest radar of any audience in sport. They've watched the equal pay fight, the broadcast battles, every structural reform.

They know who is here to grow the women's game and who is here opportunistically.

Show up before the spotlight.

This audience wants to see the athleticism and skill of women's soccer treated as world-class but brand investment often still treats it as secondary to the men's game.

A mid-season NWSL sponsorship or investment in a youth academy carries more weight than a World Cup or Olympic campaign from a brand that arrived for the moment. The fans here are often players themselves, they know who backs the pipeline, and that will pay dividends at the World Cup in 2027 and the LA Olympics in 2028.

Lead with the play.

This audience welcomes branded support when brands really mean it, but they can always spot someone inauthentically jumping on the bandwagon.

elf Cosmetics and YETI earned credibility by showing up as fans of the game. Their treatment matched the production value of men's sport and focused on the technical skill, physical intensity and competitive drama of the women's game. This audience will share work that meets the standard of what they're watching.

Back players as people.

This audience wants a space where their intersectional identity is welcome, but brands often flatten fans into a single, palatable version of "women's sports fan."

Their advocacy, their platforms, their stories off the pitch. *Indivisa* and *RE — INC* built their equity by treating players as leaders. Take a position on the issues that matter to this community and hold it.



Welcome to synthesis

We help future-proof business by making sense of the world's data.

We are a creative data consultancy, experts in defining your audience and how their needs will evolve in the short and long term.

Synthesis partners with the world's best brands to identify growth pathways into fandom and ensure brand investment drives maximum return.

Let us help you maximize your impact with sports audiences.

How to work with us →

1

Identify growth pathways for your brand.

Find out where your brand is today, and where you can grow with soccer fans, and sports fans overall. Prioritize where to focus resources - which sports, and which audience.

Leverage our existing syndicated dataset, or build a bespoke opportunity landscape for your needs.

2

Go deep to build relevance with audiences.

Dig into who your audience is and how to win with them.

Determine the role your brand can play, and tactically bring that to life through the most resonant assets, tone of voice and partnerships.

3

Measure effectiveness of partnerships.

Track how much a partnership and associated campaign has moved the needle.

Optimize campaigns with real-time feedback from audiences.

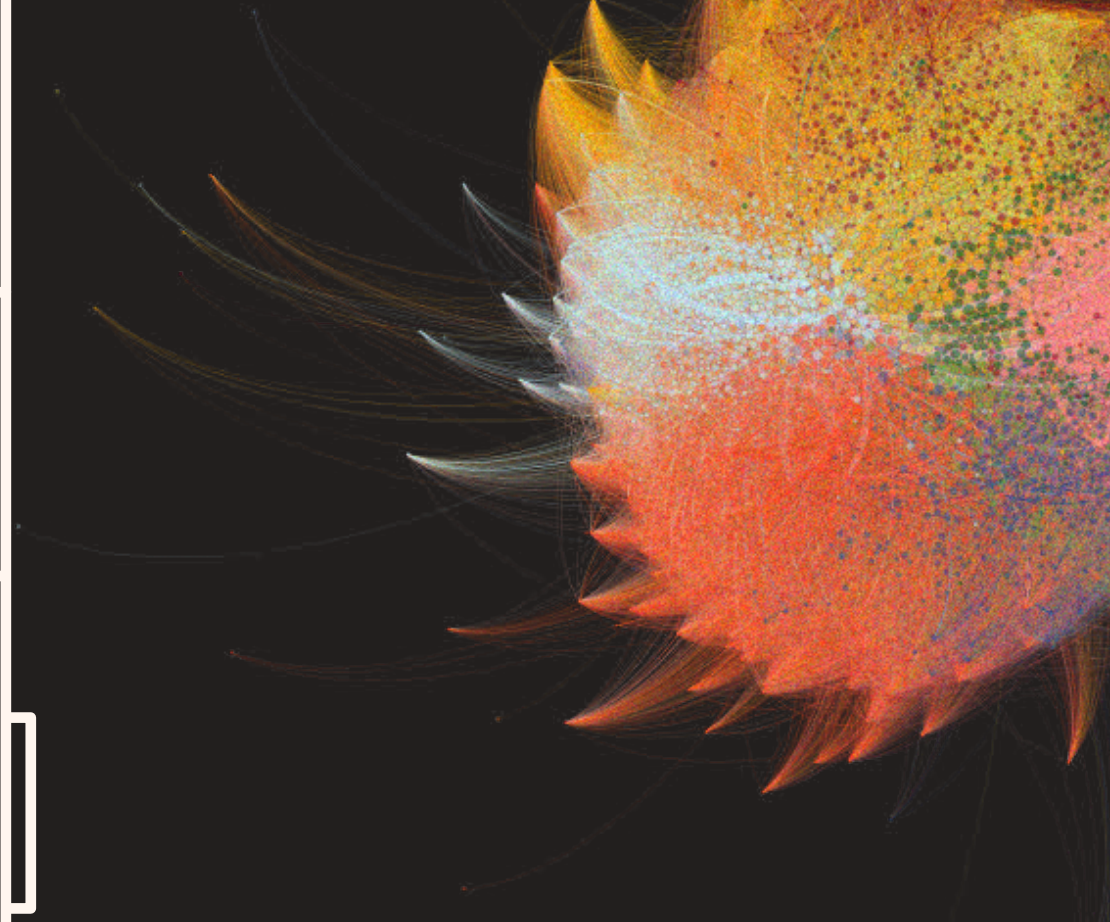


ANALYSIS & WORDS

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If you're looking to propel your brand into the future and grow beyond the fans you know, **reach out.**

We're a curious, culturally attuned, straight-talking partner who cares that the work elevates our partners.

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