

INSIDE INDIA'S SPORT'S AUDIENCE



Mapping the **655 Million** Fans
Who Power the Industry

WHO ARE INDIA'S SPORTS FANS?

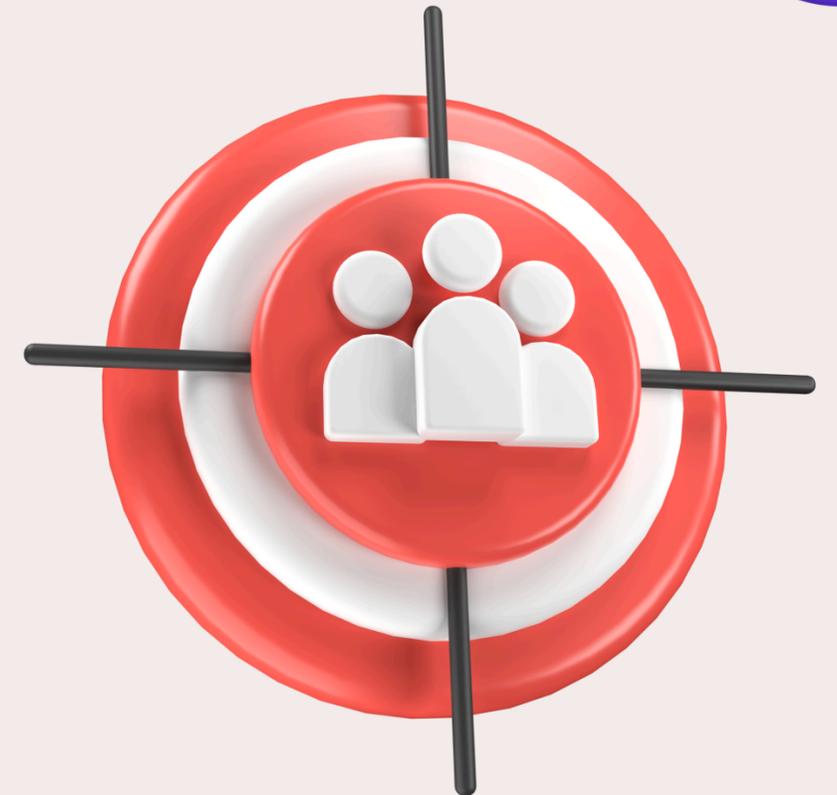


A Country of

655M+

Sports Lovers

Consumption across TV (67%), mobile apps (58%), social (62%), OTT (JioCinema, Dream11, YouTube)



43%

GenZ

36%

Women

59%

Rural

41%

Urban

WHO ARE INDIA'S SPORTS FANS?



A Total of

492M+

Follow Cricket

But Fans are also growing in...



119M

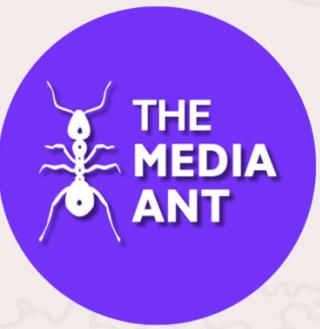
Kabaddi

85M

Football

40M

Esports



FAN FUNNEL

Levels of Engagement

From Flirters to Fanatics

SEGMENTS	HOURS/ WEEKS	TRAITS
Flirters	<3 hrs	Casual interest
Dabblers	3-7 hrs	Engaged, selective buyer
Fanatics	10.5+ hrs	Emotionally invested

Fans are not just watching—they're interacting, buying, and participating in fantasy & digital contests.

Cohort 1

Urban Gen Z Male (~85M)



- Age: **18–27** | Metro Cities | Male
- Top Sports: **IPL, ISL, Esports**
- Platforms: **JioCinema, YouTube Shorts, Dream11**
- Traits: Multi-**screeners, fantasy gamers, tech buyers**
- Avg. Engagement: **10+ hrs/week**

Cohort 2

Urban Gen Z Female (~30M)



- Age: **18–27** | Urban | Female
- Top Sports: **WPL, Badminton, Kabaddi**
- Platforms: **Instagram Reels, YouTube, JioCinema**
- Traits: Fitness-conscious, lifestyle buyers, athlete-followers
- Avg. Engagement: **3–4 hrs/week**

Cohort 3

Millennial Male Sports Buff (~95M)



- Age: **28–44** | Tier 1–2 | Male
- Top Sports: **Cricket, Football, Kabaddi**
- Platforms: **TV + OTT (JioCinema/Hotstar), Dream11**
- Traits: Loyal, OTT subscriber, merch buyer
- Avg. Engagement: **6–8 hrs/week**

Cohort 4

Rural Middle-aged Male (~105M)



- Age: **30–50** | Rural | Male
- Top Sports: **Cricket, Pro Kabaddi**
- Platforms: **Regional TV, JioCinema (mobile)**
- Traits: Group viewing, budget-conscious, vernacular-first
- Avg. Engagement: **Medium–Heavy**

Cohort 5

Urban Millennial Female (~25M)



- Age: **25–35** | Urban | Female
- Top Sports: **WPL, Athletics, Badminton**
- Platforms: **Instagram, YouTube, JioCinema**
- Traits: Fitness-focused, values-driven
- Avg. Engagement: **2–4 hrs/week**

Cohort 6

Gen Z Esports/Gaming Aficionado (~40M)



- Age: **15–22** | Urban + Tier 2 | Male
- Top Sports: **Esports, Fantasy Cricket**
- Platforms: **Twitch, Discord, Dream11, YouTube**
- Traits: Streamers, AR/VR adopters, digital collectibles
- Avg. Engagement: **12+ hrs/week**

Cohort 7

Gen Z Esports/Gaming Aficionado (~40M)



- Age: **15–22** | Urban + Tier 2 | Male
- Top Sports: **Esports, Fantasy Cricket**
- Platforms: **Twitch, Discord, Dream11, YouTube**
- Traits: Streamers, AR/VR adopters, digital collectibles
- Avg. Engagement: **12+ hrs/week**

EMERGING SPORTS = EMERGING AUDIENCES

Beyond Cricket – The Next Growth Wave



Kabaddi

200M+

Reach

WPL: Fastest growing league

(41.6% female viewership)

Kho Kho, Marathons, and Athletics are rapidly rising.



Conclusion

One Audience. Many Faces.



India's sports fans are:

- Diverse, digital-first, deeply engaged
- Spanning metros to villages, Gen Z to Gen X
- Ready for brands that understand who they are

Next Step: Map your message to the right cohort.



REFERENCES & ASSUMPTIONS

Sources and Methodology

Total audience size and segmentation based on:

- Deloitte x Google Think Sports Report (2024)
- YouGov Cricket Fandom Report (2025)
- GroupM ESP Sporting Nation XII (2024)
- Batting Outside the Field (IIM Shillong, 2023)

Cohort size estimations:

- Based on proportional segmentation of age, gender, and geography
- Rounded conservatively to reflect major overlaps and avoid inflation

Disclaimer



- All cohort sizes are **estimates** based on publicly available data and market research.
- Some user segments **may overlap**, especially in multi-sport or cross-platform behaviors.
- This presentation is intended for **illustrative purposes** and does not represent proprietary audience ownership.

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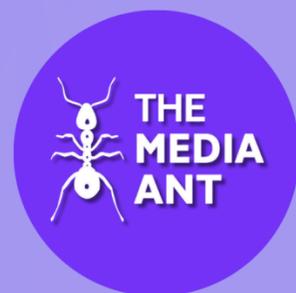
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