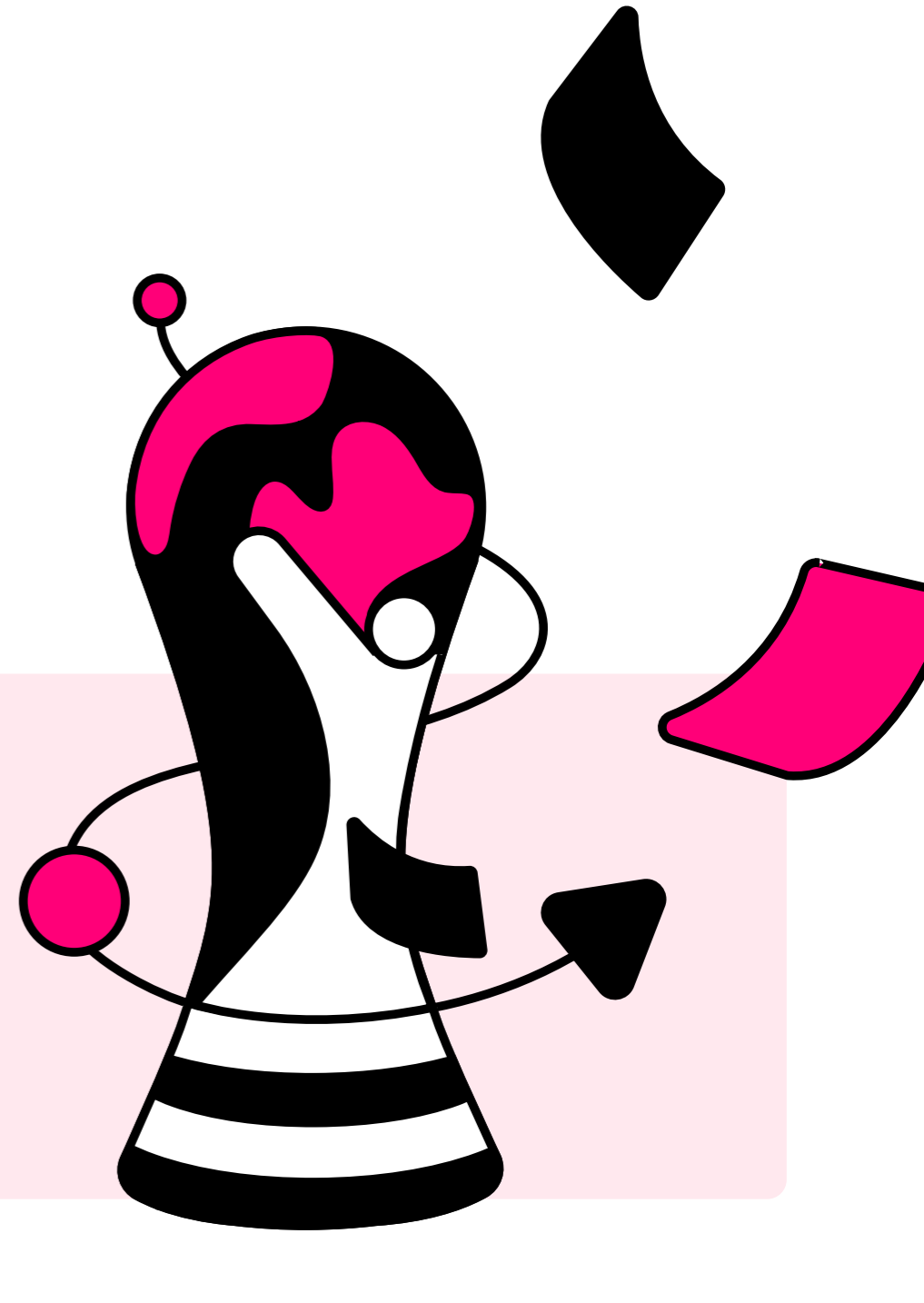


The 2026 World Cup audience playbook

Instant insights that'll drive your biggest returns

GWI.



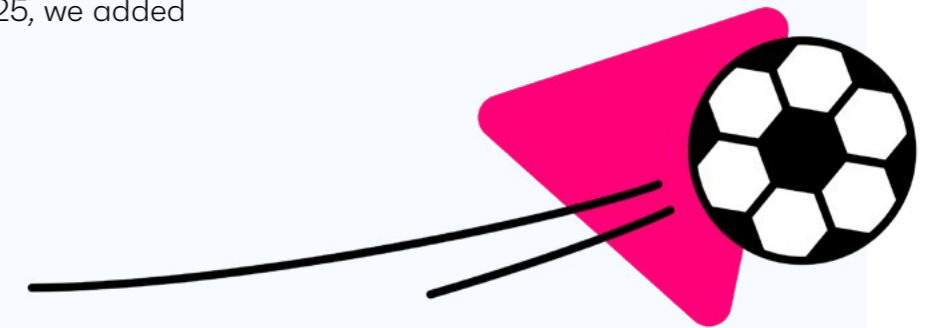
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Notes on methodology

Figures in this report use audience segments developed from GWI Zeitgeist, September 2025. GWI Zeitgeist is a monthly survey among internet users aged 16-64, and 16+ in some markets. GWI Zeitgeist is fielded in 11 markets: Australia, Brazil, Canada, France, Germany, Italy, Malaysia, Philippines, Singapore, UK, and the US. For September 2025, we added Spain and Mexico.

These segments can be applied to all GWI syndicated data sets, except for GWI USA and GWI Kids. As such, this report features multiple data sets including our flagship survey GWI Core.



01

The World Cup: The biggest cultural and commercial catalyst of the decade

The 2026 FIFA World Cup will be one of the biggest sporting events the world has ever seen – and the biggest marketing opportunity of a decade.

With 48 teams, three host nations, and billions of fans tuning in, this isn't just a tournament – it's a moment the whole world shows up for. And when the world shows up, so does spending. From travel and hospitality to merch, media, and everyday purchases influenced by the buzz, the commercial ripple effect is enormous. For marketers, it's an unmissable chance to tap into real emotion, real momentum, and real buying power.

Brands will spend more, compete harder, and fight for cultural relevance in a saturated moment. But without the right insights, the consequences are severe:

- ✘ Wasted investment on messaging, channels, or sponsorships that don't resonate
- ✘ Missed audiences in a fragmented global fan landscape
- ✘ Lost advantage to competitors who activate faster with sharper data
- ✘ No proof when boards demand ROI on seven-figure spend

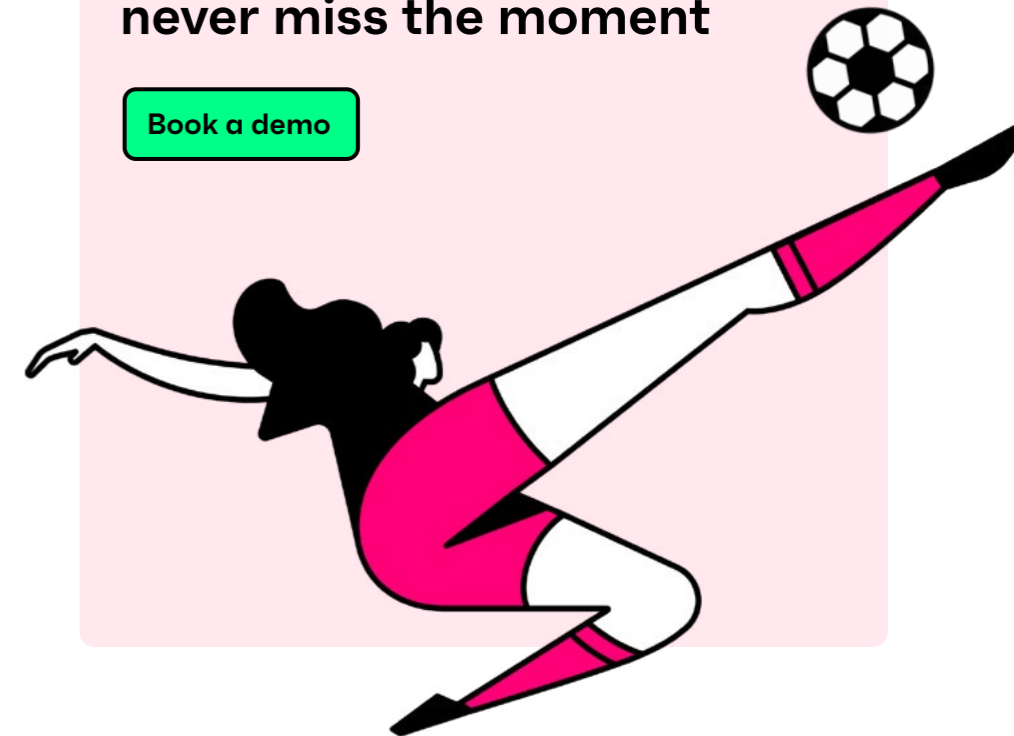
The difference between brands that capitalize – and brands that fall behind – will be simple: How well they understand their audience.

Our **latest research** reveals who World Cup fans really are, what excites them, and how they plan to engage with the tournament.

We've turned those insights into a practical playbook to help you reach the right audiences – and make sure your message lands from kickoff all the way to the final whistle.

See how GWI ensures you never miss the moment

[Book a demo](#)



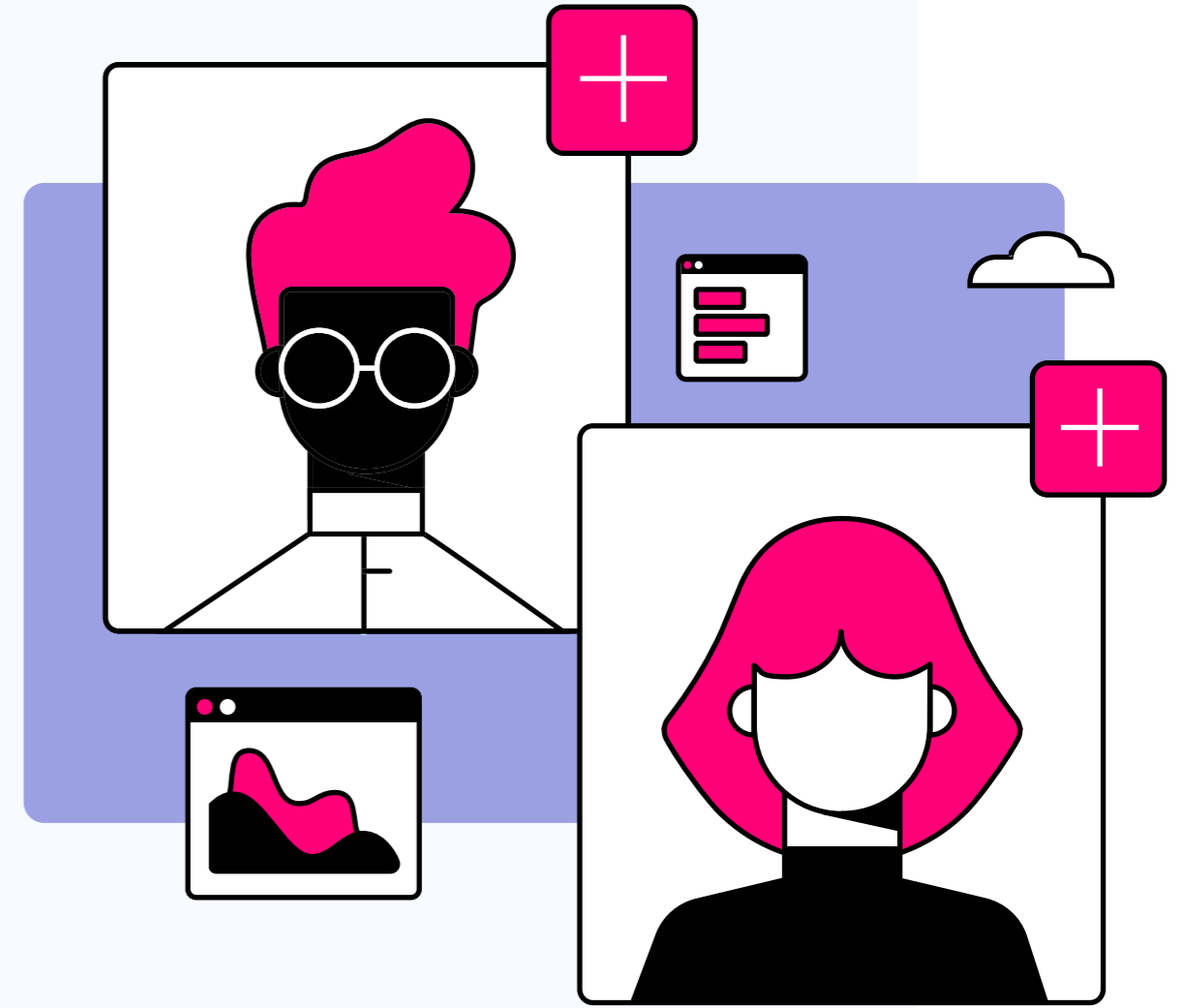
Who matters most? The fan segmentation driving World Cup ROI

Not all fans experience the World Cup the same way, and traditional demographic categories alone – like age, gender, or location – don't paint a clear enough picture to capture the motivations, mindsets, and media habits that actually move the needle.

Instead, we looked at how fans feel about the tournament and how they like to engage with it. This revealed distinct audience segments which will allow

you to target fans based on behavior, motivation, and engagement patterns, and also reveal where marketing investments will deliver the most bang for buck.

Some fans love live events and social gatherings, while others prefer second screening or watching alone – by moving beyond demographics, we can see how these fan segments experience the tournament and where brands can have the most impact. Let's dive in.





True fans

True fans are the heartbeat of the tournament, deeply passionate about the game and the World Cup experience. They watch multiple matches live, attend events, and actively post on social media. Their passion doesn't fade when the match ends – it levels up. Over 70% of these fans game multiple times a week, using platforms like EA Sports FC to keep living the game long after the final whistle.

For them, gaming isn't just entertainment; it's connection. Almost half say it's a great way to make friends, with many playing online with real-life teammates and new acquaintances.

From consoles to accessories, they're investing in the experience, carrying the energy of the World Cup into every match they play online.

What does this mean for brands?

True fans are highly receptive to advertising and brand experiences. They respond best to live and social activations, merchandise promotions, and immersive events. And with gamers, the opportunity lies in blending the spirit of the World Cup with the excitement of in-game play, through in-game add-ons, team-branded gear, and experiences that keep the competition alive.

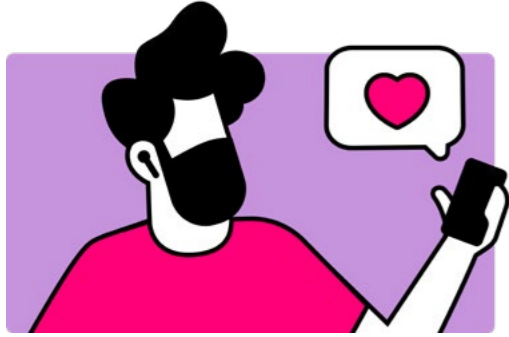


Flag flying fans

Flag flyers are patriotic, hosting social events to watch games and engage with content live. These faithful, flag-bearing fans live for the pride of seeing their nation recognized on the world stage, with 93% saying it matters deeply. Every goal carries meaning; every win, a shared identity. They're purpose-driven supporters who celebrate their culture through what they buy. Aged 25–54, with higher incomes and a love for official merchandise, this audience turns the tournament into a personal milestone.

What does this mean for brands?

Here, the play is clear: deliver premium, exclusive moments that honor their loyalty and match the emotion of the occasion. Flag flyers respond to campaigns that celebrate national identity, group participation, and sponsor partnerships. They're ideal targets for co-branded activations and limited-time offers tied to match days.



The virtual crowd

The virtual crowd engages primarily online. They follow players and influencers, participate in fantasy leagues, and consume highlights rather than full matches. These are your ‘on-the-go fans’ – a dynamic group who follow the action while staying in motion. Mostly in their mid-thirties with higher incomes, they’re 62% more likely to take multiple international trips each year and nearly twice as likely to

travel for sport. They’re adventurous, social, and plugged in, catching up through highlight clips and commentary on the move.

What does this mean for brands?

Reach this group through mobile-first, social-led campaigns that keep pace with their lifestyle. Think influencer-led content, gamification, and digital experiences.



Reluctant fans

These fans have little interest in this specific tournament, but enjoy the social aspect of tournaments. Interestingly, reluctant fans are 19% more likely to be interested in other cultures and 24% more likely to engage with foreign languages. Mostly Gen X (34%) and women (55%), they see global events like the World Cup as a stage for discovery – a reason to explore food, art, and shared traditions.

They’re second-screen multitaskers who connect through social media, using highlights, commentary, and community to make the tournament part of their everyday lives.

What does this mean for brands?

This group are second-screen natives who are 13% more likely to use social media, 18% more likely to search for products to buy, and 18% more likely to look up information related to what they’re watching while viewing TV. For marketers, this means a world of opportunity to reach them in real-time, transforming their casual viewing into an interactive experience or shoppable moment. They’re also 14% more likely to use coupons and 7% more likely to say social likes influence their online purchases, underscoring a desire for a good deal and product validation. During the World Cup, they’ll seek authenticity, inspiration, and practicality, not hype.



The lone purists

This audience doesn't need noise. Lone purists watch for the game itself. They're soccer's quiet, traditional, and incredibly dedicated devotees. 88% will watch matches live on TV, they're 44% more likely than the average consumer to watch the World Cup at home, and 77% more likely to prefer watching alone so they can focus. They're not scrolling, multitasking, or looking for second-screen experiences. For them, the World Cup is about soccer full stop.

What does this mean for brands?

For brands, earning respect through the game itself, not around it is how to reach these fans. Think halftime placements, in-match sponsorships, or creative that nods to the sport's heritage. These fans value authenticity, subtlety, and brands that understand the culture of the game.



The soccer skeptics

It's not just the folks who will be tuning into the World Cup you should have on your radar – it's also the ones who won't be. While billions will be watching, there's another story unfolding across the globe, especially in North America and Australia. 11% of global consumers, 23% in the US, and 15% in Canada and Australia, won't be watching. They're not anti-sport, soccer just doesn't click with them. These fans are filling up NFL stadiums in the American autumn, tuning

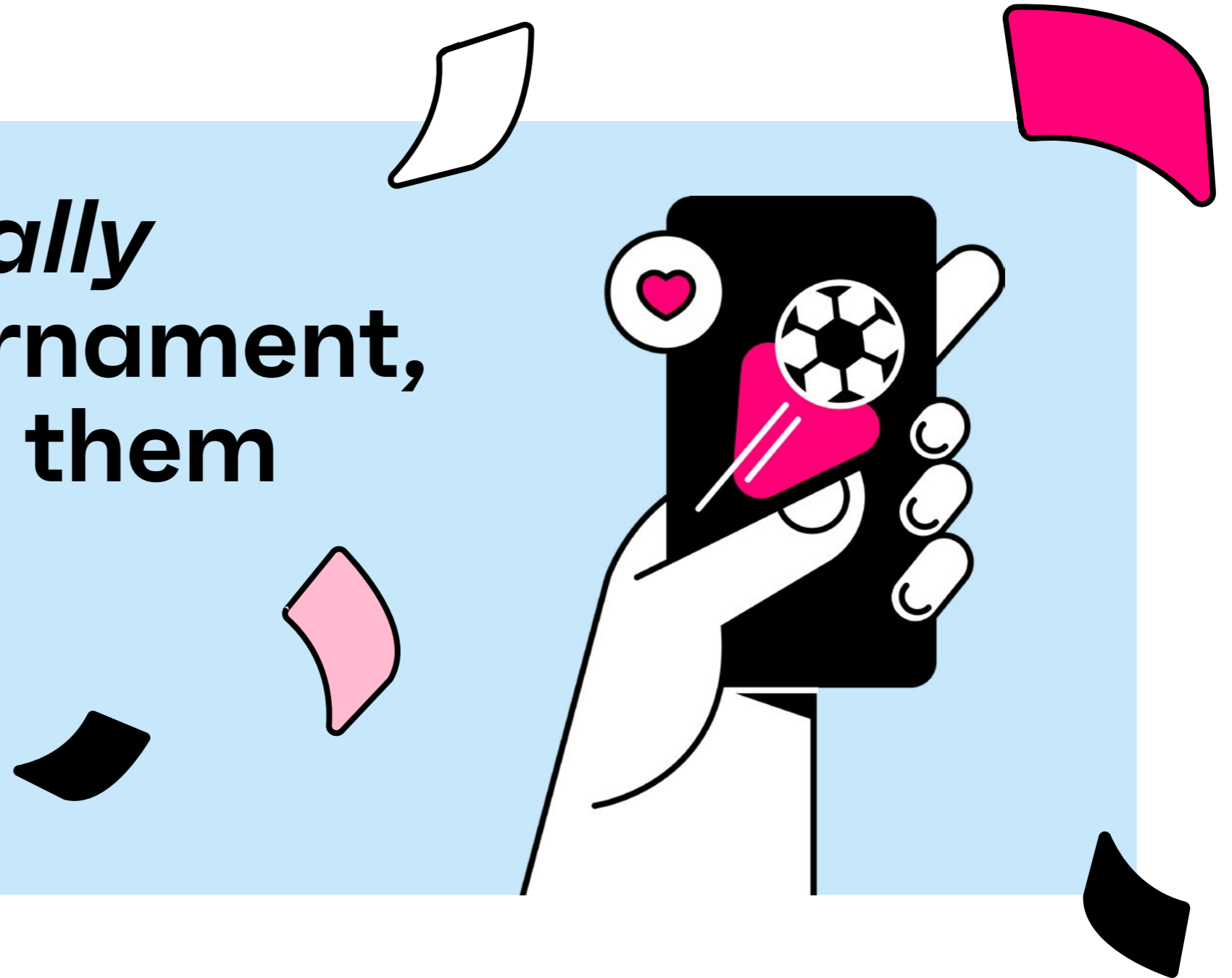
into MLB, staying up for the NBA and NHL finals, and making AFL (Australian Football League) and NRL (National Rugby League) appointment viewing.

What does this mean for brands?

The opportunity here isn't in converting this group into soccer fans, it's in meeting them where they are and connecting with them there.

How fans will *actually* experience the tournament, and where to meet them

World Cup fans interact with the tournament in ways that go far beyond simply watching the game. Let's take a deep dive into the big trends in fan engagement for 2026.



The social stadium

Not every fan will be in the stadium – and that’s not where most engagement happens. For the majority, the World Cup is experienced through a mix of digital touchpoints that extend far beyond the live broadcast. Social platforms, highlight clips, fantasy leagues, and gaming keep fans plugged into the tournament around the clock, even when they aren’t watching a full match.

Today, 74% of sports fans use social media to follow or watch sports, and Gen Z in particular moves fluidly across multiple platforms each day. Instead of sitting through entire matches, many fans engage through short-form content, with 61% consuming highlights and clips, and over a third watching them on mobile in the past week alone.

This behavior reshapes what “watching” now means. Fans track key moments on their phones, react in real time, and join conversations as they unfold, often before they’ve seen the full match. The experience is fragmented, fast-moving, and shaped as much by social narratives as by the game itself.

For brands, this creates a different kind of opportunity. Visibility no longer comes from being present in the broadcast alone. It depends on becoming part of the fan conversation – through content that’s native to digital environments, built for sharing, and easy to remix or react to. Short edits, authentic player moments, creator partnerships, and agile social storytelling are now essential to staying relevant throughout the tournament.

Tapping into trusted voices

Fans don’t just watch the game anymore, they follow the people who shape it. Today, 70% of sports fans follow athletes or teams on social media and 24% discover brands via influencer endorsements – making them 52% more likely than average to buy and use those products.

But influence only works when it’s believable. Nearly half of sports fans expect authenticity (48%), and more than half expect social responsibility (54%). Partnerships that feel forced or opportunistic won’t survive the comment section. When the connection feels

genuine, though, the payoff is huge. Sports fans are 42% more likely to purchase something with positive social proof, creating a loop where authenticity drives engagement, and engagement drives conversion.

For brands, this means collaborating rather than commissioning. It’s about letting athletes and creators tell their own stories – not fitting them into rigid scripts. In 2026, standout brand moments may not come from ad breaks – they’ll come via athletes’ own feeds.

The food and beverages taking center stage

Dropping hard-earned cash on food and drink is a huge part of the overall experience as well, and sports fans are major spenders in this space: 76% are more likely to order delivery via mobile, 82% buy snacks monthly, and 41% hit fast-food spots regularly. Watching, ordering, reacting, and posting now all happen in the same scroll. And while the classics – chips, beer, wings – still dominate, they’re increasingly sharing space with kombucha, protein snacks, adaptogens, and alcohol-free alternatives.

This might seem surprising, but despite their love of convenience foods, 52% of sports fans

describe themselves as health-conscious. 17% percent drink non-alcoholic beer at least monthly (31% above average), 67% buy health foods, and 51% purchase organic produce.

This duality opens a space for innovation. We could see watch parties with functional beverages, plant-based menus, or gyms hosting match screenings. It’s also likely fans will use pre-fuel and re-fuel health hacks to bookend boozy matches, like prepping with Korean pear juice to prevent hangovers, then recharging with electrolytes for a smooth recovery. Brands that integrate wellness into fandom, as something shared, social, and celebratory, will win.

Buying tickets and building memories

Across our data, 53% of sports fans prioritize experiences over possessions. In the last 12 months, 31% took one or two vacations abroad, and sports fans are 41% more likely than average to be interested in travel. The tri-nation format of 2026 (US, Canada, Mexico) invites that wanderlust. Fans won’t simply show up for a match – they’ll weave in beach weekends, city breaks, and cultural side-stopovers. Adventure travel resonates strongly: 51% of sports fans prefer action or adventure vacations, and 65% enjoy resort getaways.

This turns the fan journey into a kind of pilgrimage, where travel, hospitality, retail, and culture blend into one continuous experience. A single

fan might book flights with a sponsor airline, pick up a retro jersey on their phone, and share the whole thing on social – before they’ve even reached the stadium. The journey itself becomes part of the spectacle, and every step offers a moment for brands to meet fans in motion.

In 2026, expect travel brands, apparel companies, and tech platforms to collaborate in new ways to support these fan-led adventures. Airlines could bundle exclusive merchandise or let fans redeem miles for kits. Hotels might create partner-led viewing lounges or themed experiences. As categories blur, the fan journey becomes a place where culture is made, not just consumed.

Where brands can win: The four key activation arenas

We've uncovered the key fan segments and explored how they experience tournaments. Now we can dig into four engagement spaces that offer the strongest opportunities for impact.



Arena 1

Digital and social

This is where fans talk, react, and shape the story in real time. Short-form video, creator commentary, behind-the-scenes clips, and highlight edits turn the feed into a second stadium. For fans who follow the action primarily online, this is home turf.

Best for:

- ✔ The Virtual crowd – those who experience the tournament through creators and feeds
- ✔ Fans who log on to consume extra content and fan commentary
- ✔ Casual viewers who jump in when the excitement spikes

Brand opportunity: Become part of the conversation. Reactive content, creator partnerships, and fast storytelling win here.

Arena 2

Gaming and interactive platforms

For fans who extend the tournament into digital worlds, the match never really ends. Gaming is where they play out fantasies, compete with friends, and engage with the sport in new ways. It's immersive, social, and culturally powerful – especially for younger audiences.

Best for:

- ✔ The True fans and gamers who explore soccer through the world of games, AR, and interactive experiences

Brand opportunity: In-game integrations, digital collectibles, branded kits, unlockable challenges, or interactive experiences that let fans play their passion.

Arena 3

Food, drink, and in-home viewing

For many fans, the living room is the ritual center of the tournament. Snacks, drinks, deliveries, and group viewing moments turn matchday into a high-intent commerce environment. Convenience meets impulse – and brands can meet fans where they're already indulging.

Best for:

- ✔ Flag-flying fans – match loyalists who build their routine around watching at home
- ✔ Casual fans who gather for big games, snacks, and shared experiences

Brand opportunity: Timed promotions, food and beverage partnerships, bundled offers, and second-screen shopping prompts that sync with the match.

Arena 4

Travel and experience

With matches across the US, Canada, and Mexico, fans will turn the tournament into a broader lifestyle journey, combining sport, tourism, culture, and retail into one continuous experience.

Best for:

- ✔ Social-first fans who document and share every step of the trip
- ✔ Dedicated match-goers who build full itineraries around live games

Brand opportunity: Curated travel packages, sponsor-partnered lounges, themed hotel experiences, retail and tourism collaborations, and itineraries designed to be shared.

Turning insights into action: The GWI framework

Understanding fans is only the first step, and insights drive impact only when they're actionable. GWI gives brands a strategic system to activate confidently throughout the World Cup tournament.





Segmentation you can act on

GWI's **custom segmentation** goes far beyond generic clusters. Bespoke surveys capture what sets your audience apart, advanced modeling reveals distinct groups, and specialist data adds richer context for deeper analysis. These segments aren't just theory – they can be activated across platforms and tracked as the tournament evolves.

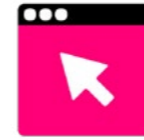
From True fans who crave exclusive experiences, to Flag flyers inspired by national pride, to the Virtual crowd seeking digital touchpoints, GWI helps you reach each group with relevance and clarity.



Expert cultural insight

Track shifting fan sentiment, emerging narratives, and cultural conversation as the tournament progresses, then adapt your messaging and media before the moment passes.

With GWI's **brand tracking**, you get visibility into how sponsorships and campaigns land with real audiences. Using our recontact methodology, we re-interview the same fans over time to show exactly how perceptions shift. Combine this with coverage across 50+ markets and 57K+ profiling attributes, and you get a tracking system that's consistent, credible, and built to prove ROI.



Creative and media decisions backed by evidence

Allocate spend across live, social, digital, and commerce channels with confidence.

GWI's **concept testing** puts ideas – from early creative routes to polished copy – in front of the right fans, giving you feedback you can trust.

Ad effectiveness isolates the true impact of your World Cup campaigns and gives you real proof points on how your campaigns are running. By re-interviewing fans before and after exposure, we show which messages drove attention and purchase behavior – and which didn't. Add creative diagnostics and targeting validation, and you'll know exactly what to optimize.



ROI you can prove

GWI's **recontact methodology** shows the real impact of your sponsorships, ads, and activations as the tournament unfolds – delivering measurable uplift, board-ready evidence, and genuine confidence in your investment decisions.

Together, these capabilities give you a single, end-to-end system for turning fan understanding into actions that win attention, drive ROI, and deliver measurable World Cup impact.

The World Cup playbook: 7 steps every brand should take



1 Identify your priority fan segments

Begin by grounding your strategy in the fan groups that matter most. Whether it's True fans craving immersive experiences, Flag flyers driven by national pride, or the Virtual crowd who follow from the feeds, each segment offers a distinct pathway to impact. Clarity here determines where you place your bets.

3 Build creative and content tailored to their motivations

Relevance wins every time. Craft messaging that mirrors what your audience cares about: pride, connection, play, discovery, or tradition. Your content should speak their language, reflect their mindset, and show up in formats they naturally respond to.

5 Partner with talent who influence their decisions

Athletes, creators, commentators, and everyday fans now shape the cultural narrative around the tournament. Align with voices your audience trusts, and let them tell the story authentically. The right talent partnership builds credibility, relevance, and emotional connection instantly.

7 Track performance and optimize in real time

During a tournament where sentiment shifts by the hour, measurement can't wait until the end. Monitor how perceptions, engagement, and purchase intent change across the tournament, then adjust creative, spend, or placements accordingly.

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2 Map how they engage across digital, social, and real-life environments

Fans don't experience the World Cup in a single channel. Some gather at home, others scroll highlight clips on the move, and others extend the excitement into gaming or even international travel. Mapping these touchpoints shows where your brand can add value – not noise.

4 Match channel strategy to their behaviors

Don't force fans into your funnel – follow their footprints. Connect digital-first fans through short-form video and social storytelling. Engage at-home viewers with timely ad-break offers or second-screen commerce prompts. Reach gamers and interactive audiences through immersive, playable experiences.

6 Test and validate your messaging

The World Cup moves quickly, and so do fan expectations. Pre-test concepts, creative routes, and campaign messages with real fans to understand what will resonate and what needs work. Validating ideas early ensures every dollar spent is working hard.

07

Final word: Understanding fans isn't optional – it's how you win

The World Cup creates shared cultural moments that few other events can match. It reconnects audiences in an increasingly solo-viewing world, delivering emotion, connection, and collective joy that drives real engagement.

Brands that deeply understand their fans – who they are, what drives them, and how they engage – will capture this attention, influence behavior, and generate measurable impact. And GWI gives brands that advantage.

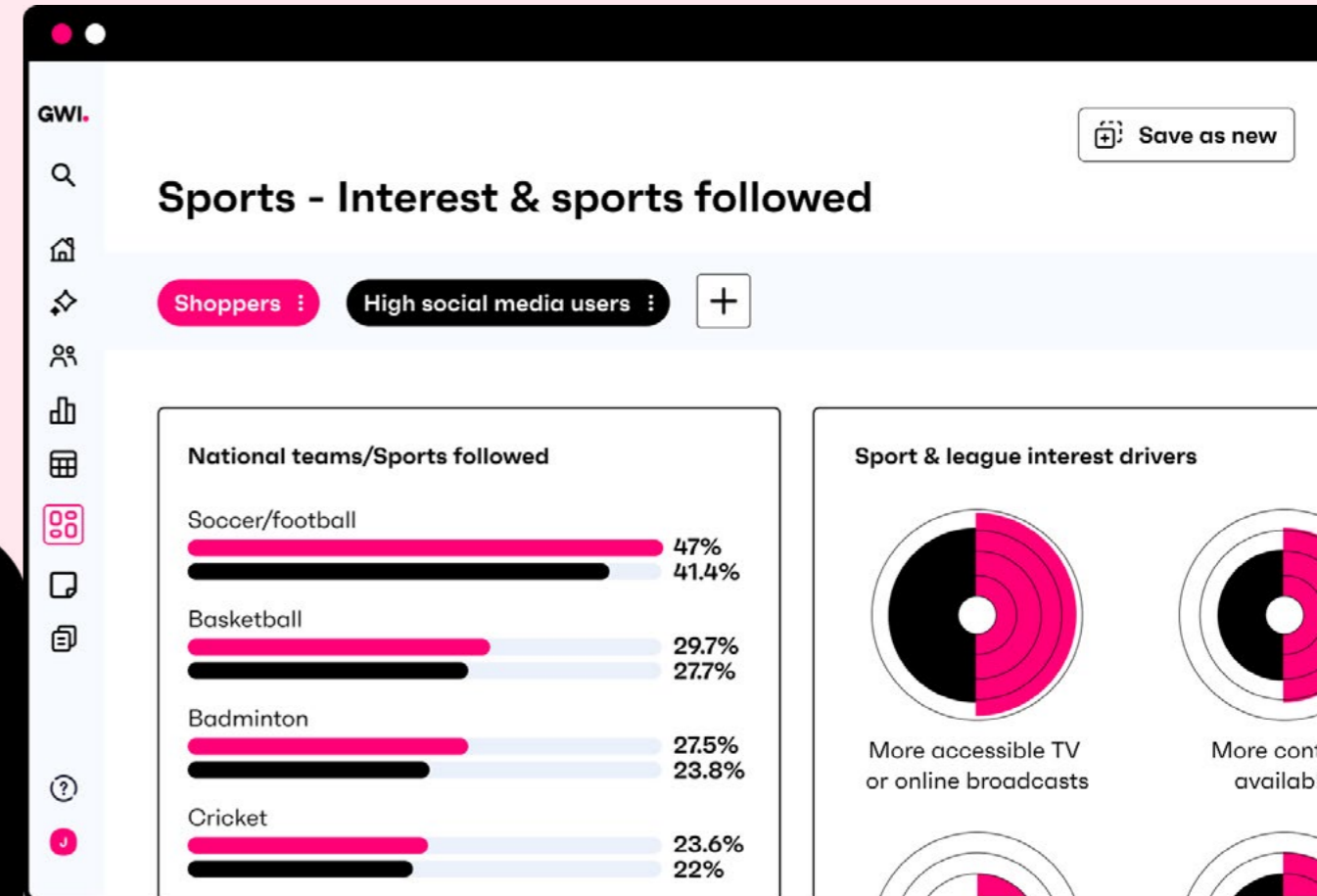


Need help turning audience insights like these into actual World Cup impact?

GWI gives you instant access to data representing over 3 billion consumers globally.

Book your demo to see how it can help you hone in on the right audience.

[Book your demo](#)



GWI.