



Global Sports Attitudes and Behaviors

For IBM

 **MAY 2024**

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METHODOLOGY & AUDIENCES

Methodology

This survey was conducted in May 2024 among a total sample of 18,082 sports fans 18+ in the US, Canada, the UK, France, Germany, Italy, Spain, India, the UAE, and Saudi Arabia.

The interviews for each country were conducted online, and the data is unweighted, with ~2,000 responses per market in the US, Canada, the UK, France, Germany, Italy, Spain, and India and ~1,000 responses per market in the UAE and Saudi Arabia.

To qualify for this survey respondents must be at least an average sports fan and follow one or more of the following sports: Soccer, Cricket, Tennis, Basketball, Baseball, Rugby, Golf, American football, F1 racing, Track and field, Swimming, and the Olympics.

Audiences

Sports fans by country		
	Sample Size	Margin of Error (MOE)
Global	18082	+/- 1%
US	2138	+/- 2%
Canada	2007	+/- 2%
UK	2001	+/- 2%
France	1972	+/- 2%
Germany	2010	+/- 2%
Italy	2008	+/- 2%
Spain	1861	+/- 2%
India	2033	+/- 2%
UAE	1045	+/- 3%
Saudi Arabia	1007	+/- 3%
Sports fans by sport		
	Sample Size	Margin of Error (MOE)
Soccer	11599	+/- 1%
Cricket	2837	+/- 2%
Tennis	5705	+/- 1%
Basketball	5709	+/- 1%
Baseball	2629	+/- 2%
Rugby	1418	+/- 3%
Golf	1957	+/- 2%
American Football	3729	+/- 2%
F1 Racing	4751	+/- 1%
Track and Field	3214	+/- 2%
Swimming	4121	+/- 2%
Olympics	6960	+/- 1%

Key findings

Sports consumption largely takes place at home through TV, with a notable trend towards engagement via subscription streaming and digital technologies.

- Sports fans are most likely to be attending only around 1 to 4 sporting events in-person a year. However, most fans are watching or listening to live events or highlights at least weekly.
- While TV is the most common method for sports consumption, mobile devices are a noteworthy alternative for consumers, and is the top way fans in the UAE and India listen to sporting events.
- Subscription streaming of live sporting events is most popular among younger fans, while those 45+ remain loyal to linear broadcasting. Sports viewers in the UAE, India, and Saudi Arabia are more likely to watch live events through subscription streaming over traditional cable.
- There is also a shift towards social media for sports summaries, as younger fans are most likely to view highlights through social media over other platforms.
- There is a noteworthy lack of intermediate spaces for fans to watch sporting events. Fans primarily watch live sporting events at home, with in-person attendance being slightly more preferred over bars or restaurants.

Frequent sports listening habits suggest a chance for technology to enhance the sports experience on another device.

- While watching sports is more common, most fans listen to sports in any format weekly+, freeing up visual real estate for additional content. Cricket, basketball, baseball, and golf followers are more likely than fans of other sports to listen to live sporting events daily.
- 24% of sports listeners use at least two devices to listen to sports, with fans in the US, Canada, India, and the UAE seeing the highest use of multiple devices. Fans between 18 and 44 are more likely to be using 3 or more devices. Canadian fans 18-29 stand out, with 22% using 3+ devices while listening to sports.
- Multi-device use is highest among followers of golf and cricket, among which around a third respectively use 2 or more devices while listening.

Generative AI can improve the sports consumption by delivering live updates and easy-to-digest content.

- Sporting events are largely watched live, and unsurprisingly, fans are most likely to prioritize real-time updates when thinking about the ways that generative AI can improve their sports consumption.
- When fans consume additional sports content, they are most likely to be looking at short media like video highlights and are looking to save time with summarized content.

SPORTS FANS AGE PROFILE

Age plays a big part: younger fans engage with content through more screens, in social media and are more likely to see the benefits of AI

	Age: 18-29	Age: 30-44	Age: 45-54	Age: 55+
<i>Sport consumption habits and preferences</i>	Most likely to watch sports summaries and get additional content in social media	Most likely to watch and listen to live sporting events weekly+	Most likely to listen to sporting summaries on a weekly basis (along with 30-44 yos)	Least likely to consider themselves avid sports fans (particularly in UAE and SA)
	More likely to watch live sports at home with others via subscription streaming		More likely to watch live sports alone at home via linear broadcast	
	Younger generations are much more likely to use multiple devices while watching sports than older generations, often to multi-task and to get more information about the game			
<i>Artificial Intelligence</i>	On average, 55% use GenAI regularly or occasionally (highest in IN)	On average, 42% use GenAI regularly or occasionally (highest in IN)	On average, 35% use GenAI regularly or occasionally (highest in the UAE)	On average, 25% use GenAI regularly or occasionally (highest in the UAE)
	Younger generations are much more likely to see the potential of AI-enabled enhancements to sports, notably real time updates and personalized content			

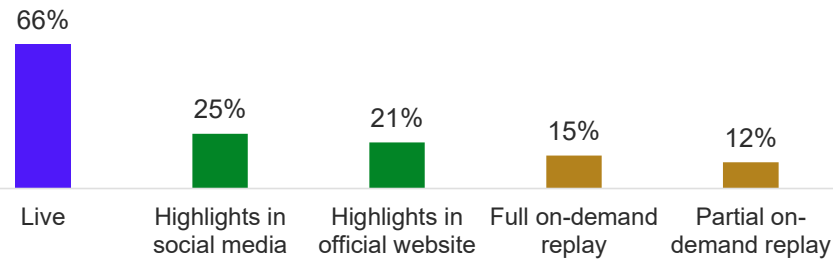
TENNIS HIGHLIGHTS

Tennis fans consumption habits and preferences

At home: Tennis fans across the 10 markets alternate between watching games socially (61%) and alone (66%) at home.

Methods used to watch favorite sporting events

Tennis fans



High commitment: 66% of tennis fans are willing to wake up early to watch a game they're interested in

Multi-device use while watching sporting events

Tennis Fans

■ 1 device ■ 2 devices ■ 3 devices ■ More than 3 devices

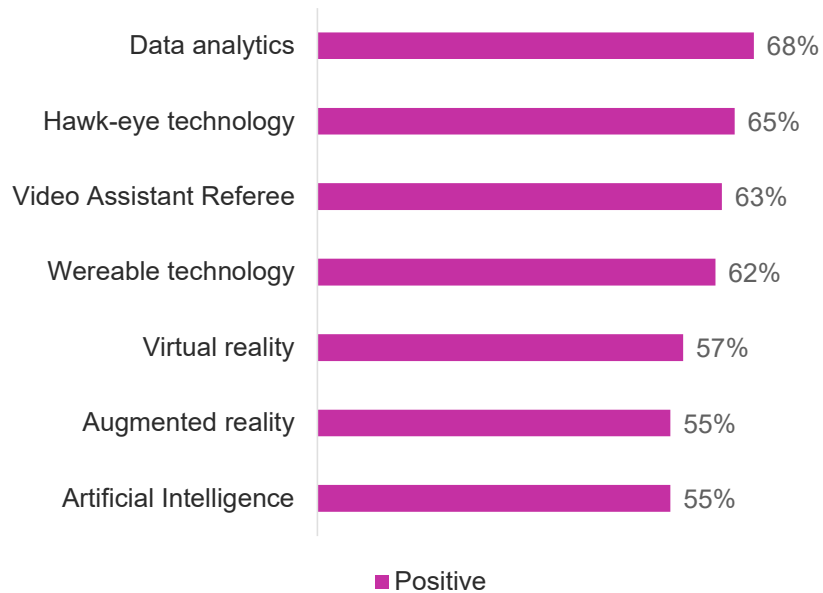


Second screen enhances experience: 45% of tennis fans who use 2+ devices report doing it to get more game info and 32% to keep up with multiple games

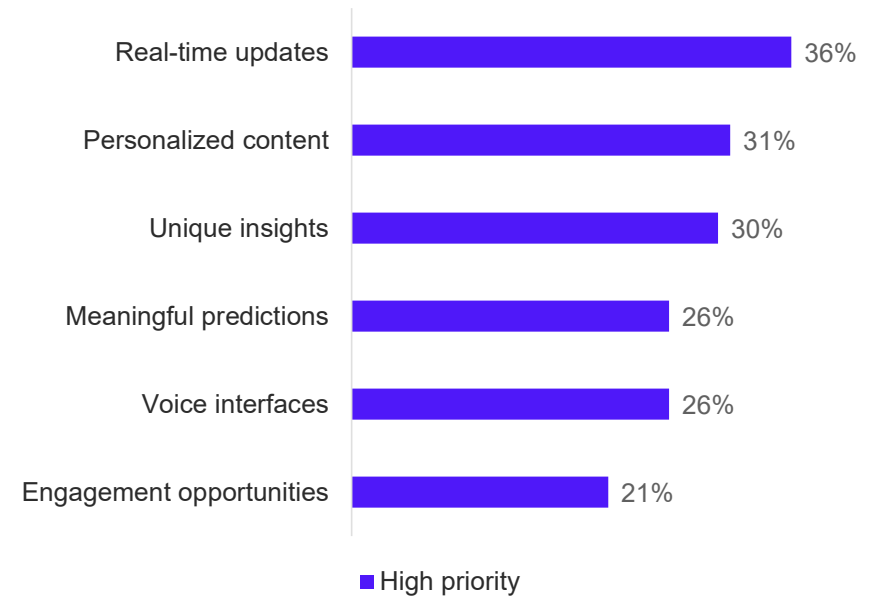
TENNIS HIGHLIGHTS

Tennis fans technology and AI attitudes

Positive impact of technologies
Tennis fans



Top priorities for GenAI improvements
Tennis fans aware of AI



SECTION 2

Sports Landscape



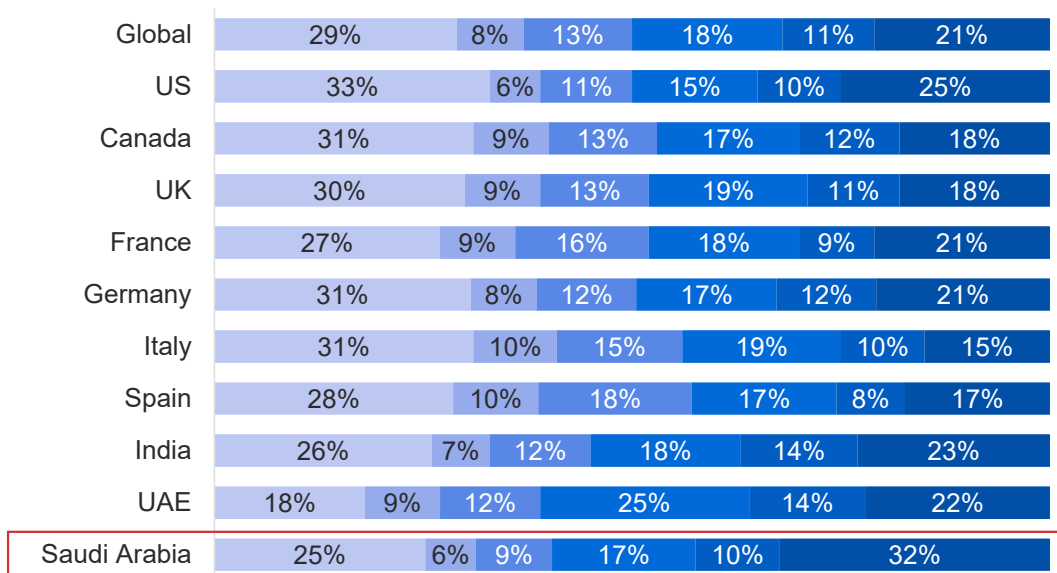
SPORTS LANDSCAPE

21% of sports fans classify themselves as avid fans, with Saudi Arabia having the highest proportion of avid fans

IBMdem2 Please indicate where you would place yourself on a scale from 0 to 10, where 0 means you are not a sports fan at all, 5 means you are an average sports fan and 10 means you are an avid sports fan.

Sports fan ratings
By country

■ 5 (average) ■ 6 ■ 7 ■ 8 ■ 9 ■ 10 (Avid)



Avid sports fans, 10 (Avid)
By age group/country

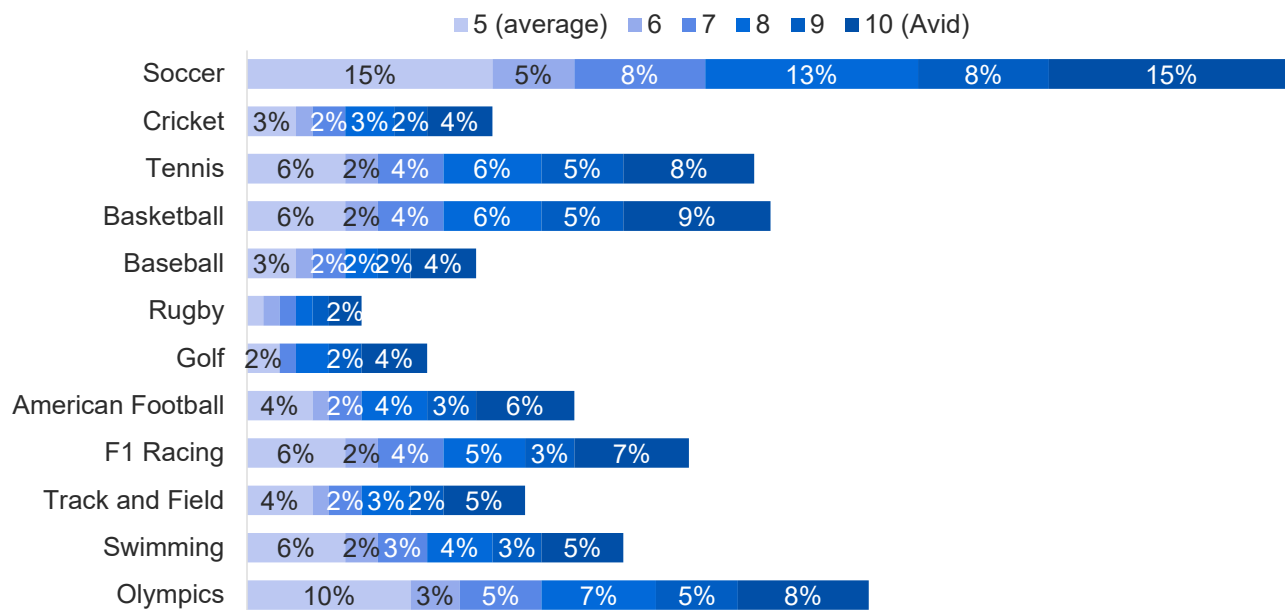
	18-29	30-44	45-54	55+
Global	25%	24%	19%	16%
US	26%	30%	31%	19%
Canada	29%	16%	15%	15%
UK	19%	22%	17%	14%
France	23%	21%	19%	22%
Germany	22%	25%	18%	18%
Italy	19%	15%	14%	15%
Spain	27%	20%	14%	11%
India	24%	24%	22%	15%
UAE	33%	29%	10%	4%
Saudi Arabia	37%	35%	40%	5%

SPORTS LANDSCAPE

Soccer boasts the largest fandom, with 64% of fans following the sport; Only around 1 in 10 sports fans respectively follow golf or rugby

IBMdem2 Please indicate where you would place yourself on a scale from 0 to 10, where 0 means you are not a sports fan at all, 5 means you are an average sports fan and 10 means you are an avid sports fan. // IBMdem3 What sports, if any, do you typically follow? Select all that apply.

Sports fan ratings
By sport



Global distribution of sports fans
By sport

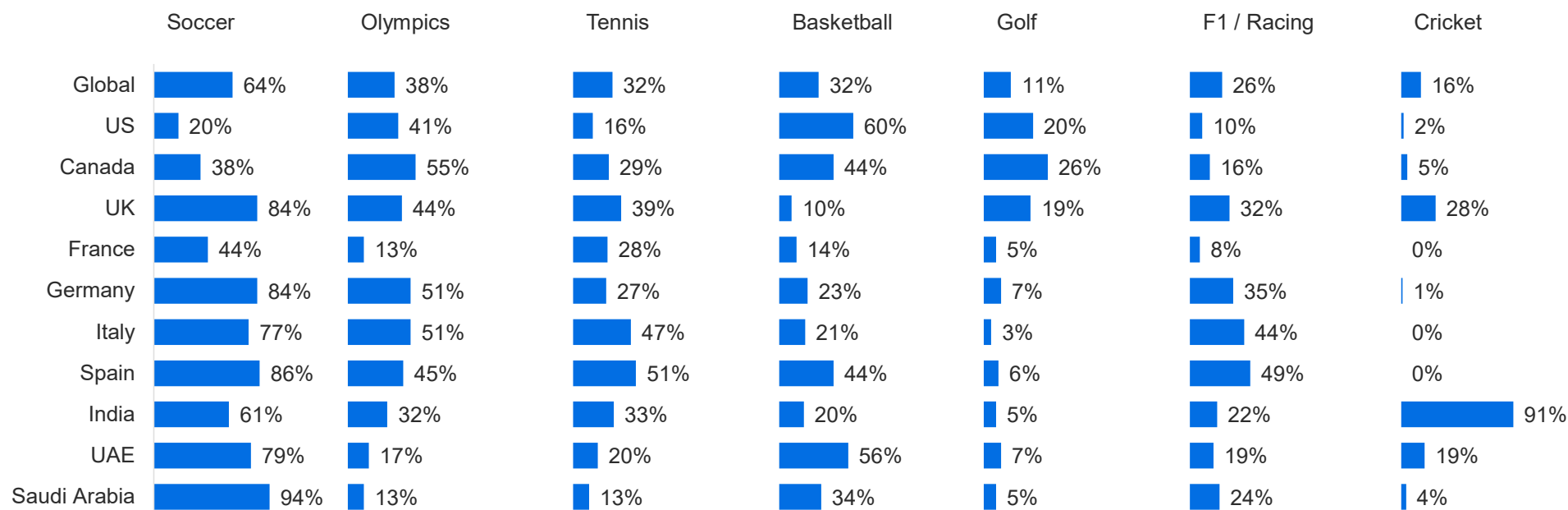
	Total
Soccer	64%
Cricket	16%
Tennis	32%
Basketball	32%
Baseball	15%
Rugby	8%
Golf	11%
American Football	21%
F1 Racing	26%
Track and Field	18%
Swimming	23%
Olympics	38%

SPORTS LANDSCAPE

While the popularity of many key sports is largely confined to certain countries, soccer and the Olympics have notable global audiences

IBMdem3 What sports, if any, do you typically follow? Select all that apply.

Following of key sports
By country





Market Overview

1

Sporting Event Consumption

Watching & Listening Habits, Preferences & Behaviors

2

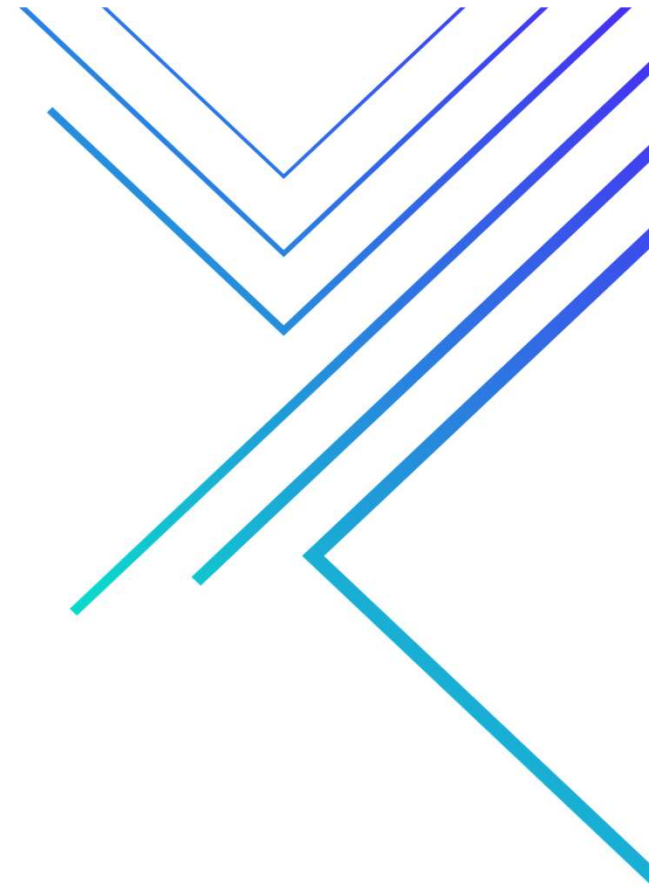
Sports Content Engagement

3

Technology's Role in Sports

MARKET OVERVIEW: SPORTING EVENT CONSUMPTION

Watching & Listening Habits

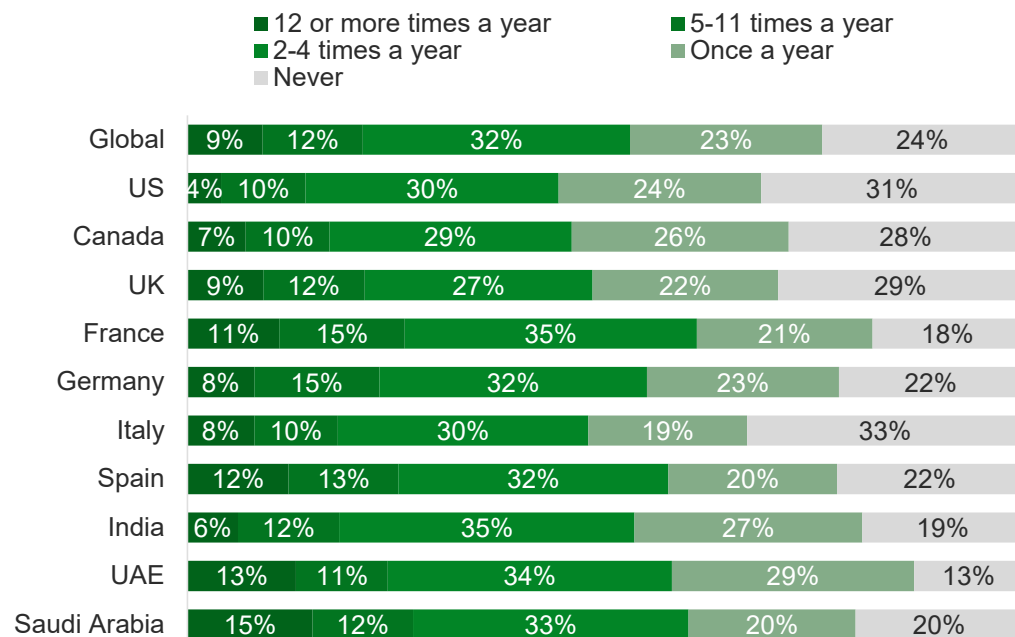


WATCHING AND LISTENING HABITS

Interestingly, sports fans 55+ in the UAE and SA are more likely than their younger counterparts to attend in-person events

IBM1 In a typical year, how often do you attend sporting events in-person?

Frequency of in-person sporting event attendance
By country



Respondents who never attend in-person sporting events,
Never

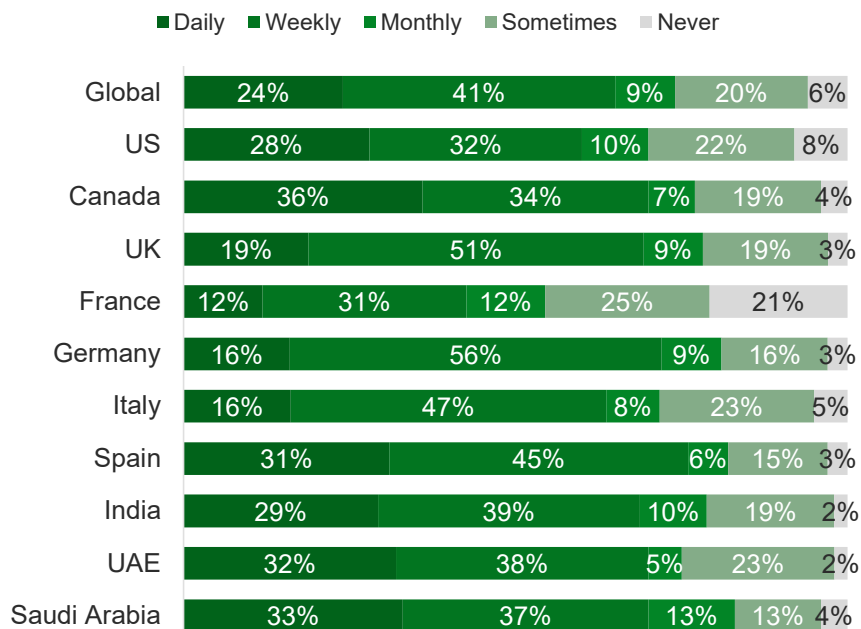
	By age group/country			
	18-29	30-44	45-54	55+
Global	17%	19%	25%	35%
US	20%	20%	34%	42%
Canada	14%	19%	30%	43%
UK	18%	23%	27%	40%
France	13%	15%	20%	22%
Germany	12%	17%	22%	35%
Italy	24%	26%	27%	43%
Spain	16%	14%	23%	35%
India	19%	17%	27%	31%
UAE	16%	16%	17%	3%
Saudi Arabia	22%	22%	22%	7%

WATCHING AND LISTENING HABITS

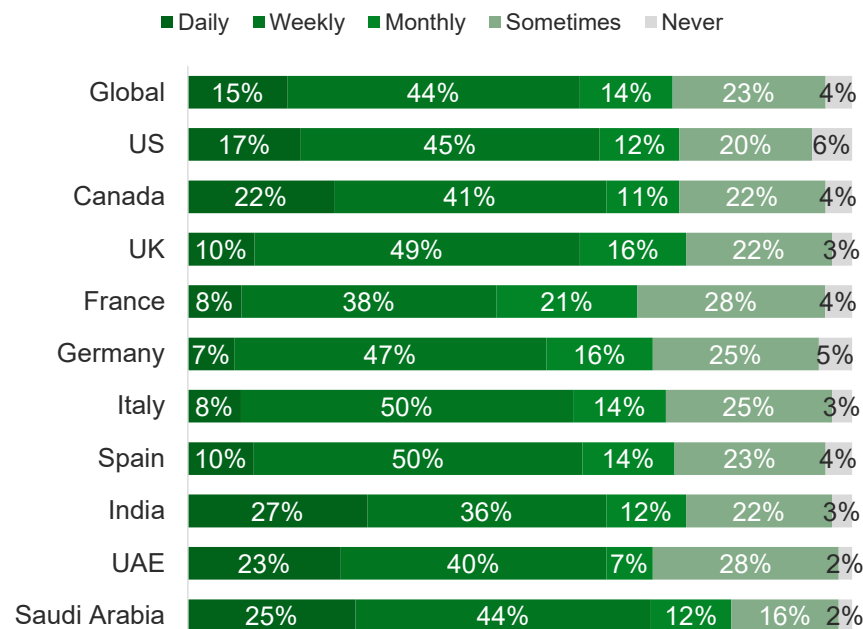
Sports fans watch a combination of sporting events, but are engaging with summaries and highlights more often

IBM2 How often do you watch sporting events in the following formats?

Frequency of watching summaries or highlights
By country



Frequency of watching live sporting events
By country



WATCHING AND LISTENING HABITS

In general, sport viewing habits tend to be consistent across age groups; UAE fans 55+ are notably less likely than younger UAE fans to watch sports

IBM2 How often do you watch sporting events in the following formats?

Frequent sports summary watchers, Weekly+
By age/country

	18-29	30-44	45-54	55+
Global	62%	68%	68%	65%
US	61%	63%	64%	57%
Canada	65%	74%	71%	69%
UK	60%	74%	71%	71%
France	45%	45%	41%	40%
Germany	63%	71%	76%	75%
Italy	56%	62%	63%	68%
Spain	65%	73%	79%	85%
India	65%	72%	71%	71%
UAE	72%	77%	80%	48%
Saudi Arabia	65%	72%	75%	76%

Frequent live sporting event watchers, Weekly+
By age/country

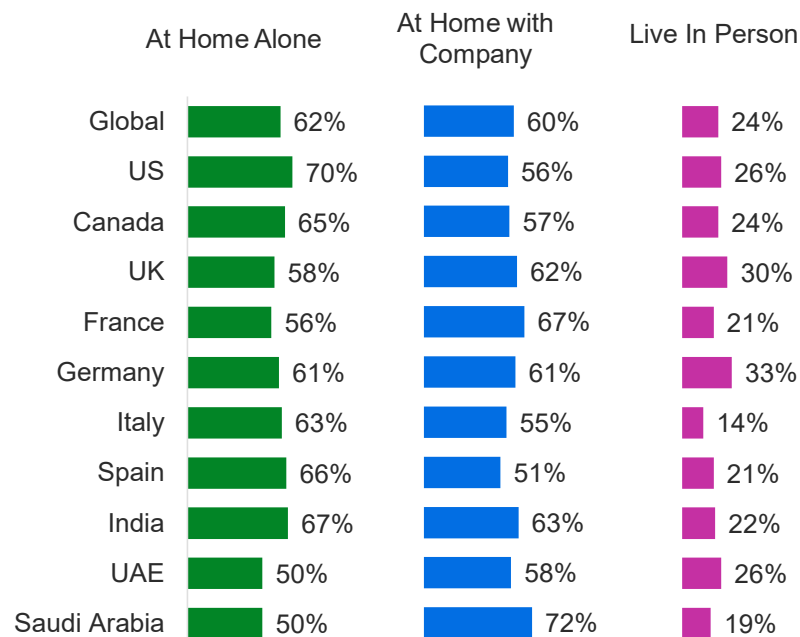
	18-29	30-44	45-54	55+
Global	58%	62%	57%	59%
US	58%	61%	64%	63%
Canada	59%	65%	55%	68%
UK	55%	62%	58%	59%
France	47%	47%	45%	46%
Germany	53%	58%	55%	51%
Italy	52%	57%	59%	59%
Spain	55%	62%	58%	62%
India	63%	64%	60%	62%
UAE	62%	69%	73%	45%
Saudi Arabia	68%	70%	65%	74%

WATCHING AND LISTENING HABITS

Fans primarily watch at home, with live in-person attendance preferred over bars for out-of-home viewing

IBM3 Where are you most likely to watch live sporting events? Please select up to three of your top choices.

Top 3 most likely places to watch live sporting events
By country, among those who watch



Most likely place to watch live sporting events, Top 1
By age/country, among those who watch

	18-29	30-44	45-54	55+
Global	Home+	Home+	Home	Home
US	Home	Home	Home	Home
Canada	Home	Home	Home* Home+*	Home
UK	Home+	Home+	Home+	Home
France	Home+	Home+	Home+	Home+
Germany	Home	Home+	Home+	Home
Italy	Home+	Home	Home	Home
Spain	Home+	Home	Home	Home
India	Home	Home	Home	Home
UAE	Home+	Home+	Home	Home* Home+*
Saudi Arabia	Home+	Home+	Home+	Home+

Home
= At home alone

Home+
= At home with company

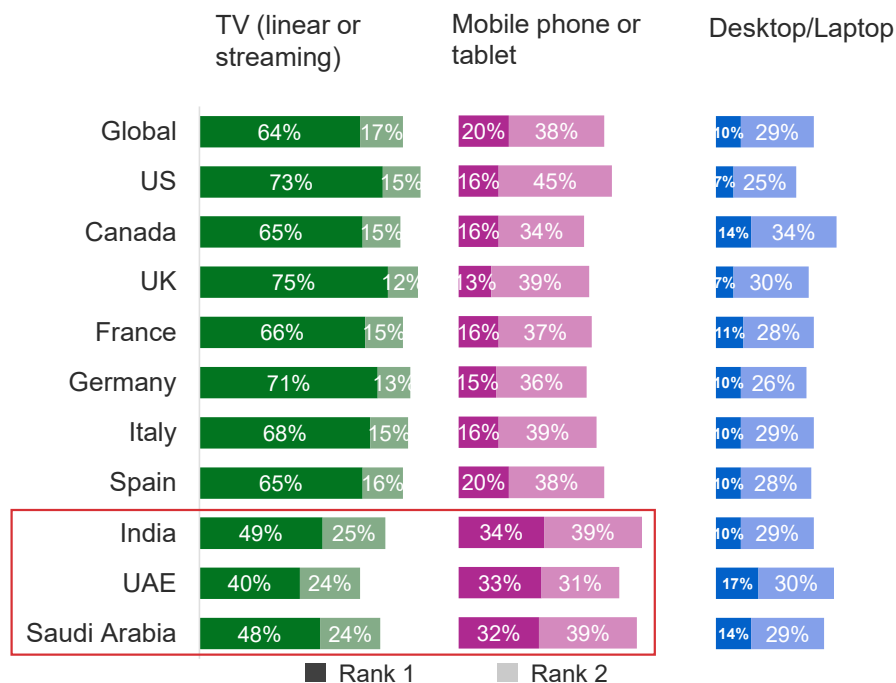
*Tied for top 1

WATCHING AND LISTENING HABITS

TV leads as the top choice for watching sports, with mobile devices following as the second choice; Laptops emerge as a notable alternative for the second option

IBM5 What device do you most typically use to watch sporting events? Please rank the top 5 options, with 1 being the most likely to use and 5 being the fifth most likely to use.

Ranking of top 2 devices used to watch sports
By country, among those who watch



Percentage of respondents who marked mobile phone or tablet as top device
By age/country, among those who watch

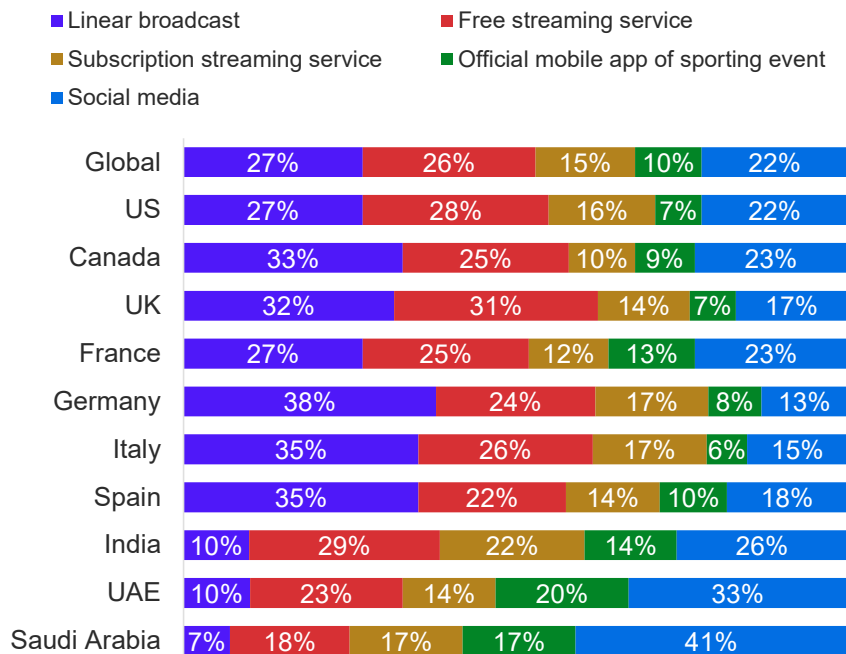
	18-29	30-44	45-54	55+
Global	33%	24%	15%	9%
US	33%	21%	13%	7%
Canada	28%	21%	14%	7%
UK	26%	18%	10%	5%
France	32%	14%	13%	10%
Germany	30%	18%	10%	6%
Italy	30%	19%	14%	11%
Spain	32%	25%	18%	10%
India	39%	33%	21%	20%
UAE	41%	36%	24%	26%
Saudi Arabia	38%	31%	27%	25%

WATCHING AND LISTENING HABITS

Sports highlights viewership is shifting, with younger fans favoring social media and older viewers remaining loyal to linear broadcasting

IBM6 What platform are you most likely to use to watch a sporting event in the following formats?

Most used platforms to watch summaries or highlights
By country, among those who watch



Top platform used to watch summaries or highlights, Top selected
By age/country, among those who watch

	18-29	30-44	45-54	55+
Global	Social	Social	Traditional	Traditional
US	Social	Free Streaming	Traditional* Free Streaming*	Traditional
Canada	Social	Social	Traditional	Traditional
UK	Social	Free Streaming	Traditional	Traditional
France	Social	Social	Traditional	Traditional
Germany	Social* Free Streaming*	Traditional	Traditional	Traditional
Italy	Social	Free Streaming	Traditional	Traditional
Spain	Social	Traditional	Traditional	Traditional
India	Free Streaming	Sub. Streaming	Free Streaming	Free Streaming
UAE	Social	Social	Free Streaming	App
Saudi Arabia	Social	Social	Social	Social* App*

Traditional
= Linear broadcast
(i.e., traditional cable)

Sub. Streaming
= Subscription streaming service

Free Streaming
= Free streaming service

Social
= Social media platforms

App
= Official mobile app of sporting event / institution

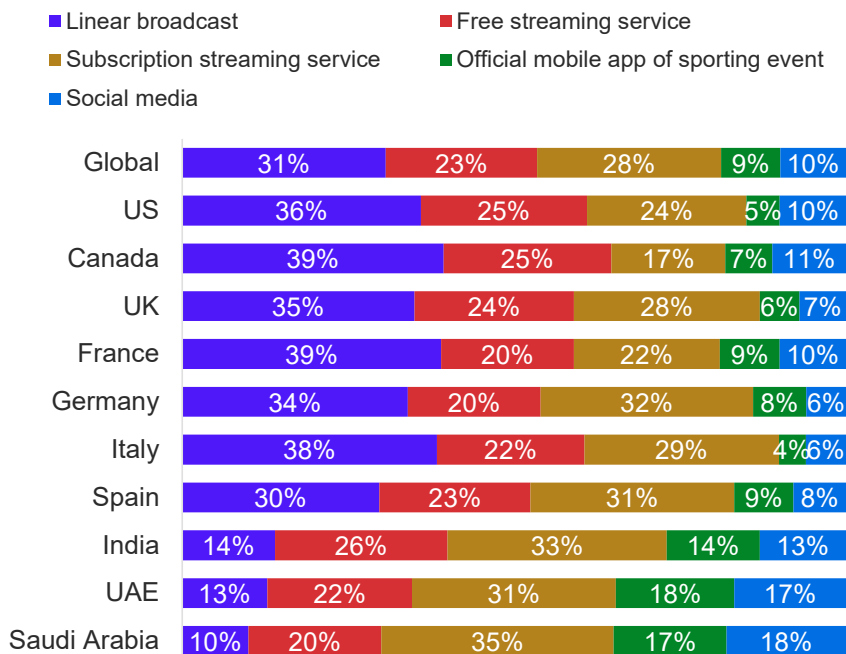
*Tied for top 1

WATCHING AND LISTENING HABITS

Viewers in India, the UAE, and Saudi Arabia are most likely to opt for subscription streaming of live events, while other markets typically watch via linear broadcasting

IBM6 What platform are you most likely to use to watch a sporting event in the following formats?

Most used platforms to watch live sporting events
By country, among those who watch



Top platform used to watch live sporting events, Top selected
By age/country, among those who watch

	18-29	30-44	45-54	55+
Global	Sub. Streaming	Sub. Streaming	Traditional	Traditional
US	Free Streaming	Sub. Streaming	Traditional	Traditional
Canada	Free Streaming	Free Streaming	Traditional	Traditional
UK	Sub. Streaming	Traditional	Traditional	Traditional
France	Free Streaming	Sub. Streaming	Traditional	Traditional
Germany	Sub. Streaming	Sub. Streaming	Traditional	Traditional
Italy	Sub. Streaming	Traditional	Traditional	Traditional
Spain	Sub. Streaming	Sub. Streaming	Sub. Streaming	Traditional
India	Free Streaming	Sub. Streaming	Sub. Streaming	Sub. Streaming
UAE	Sub. Streaming	Sub. Streaming	Sub. Streaming	Social* App*
Saudi Arabia	Sub. Streaming	Sub. Streaming	Sub. Streaming	Traditional* App*

Traditional
= Linear broadcast
(i.e., traditional cable)

Sub. Streaming
= Subscription streaming service

Free Streaming
= Free streaming service

Social
= Social media platforms

App
= Official mobile app of sporting event / institution

*Tied for top 1

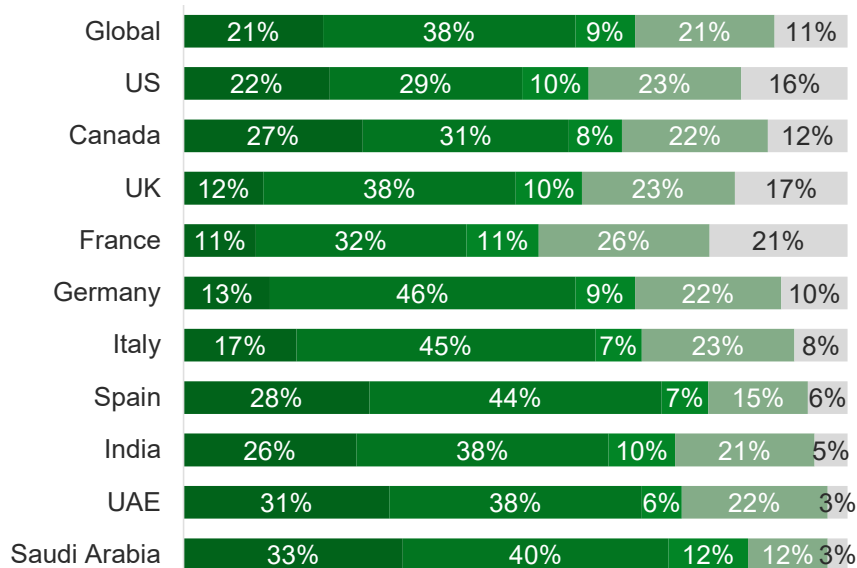
WATCHING AND LISTENING HABITS

Although sports fans are more likely to frequently watch sporting events, more than half of sports fans globally listen to sporting events in either format weekly+

IBM7 How often do you listen to sporting events in the following formats?

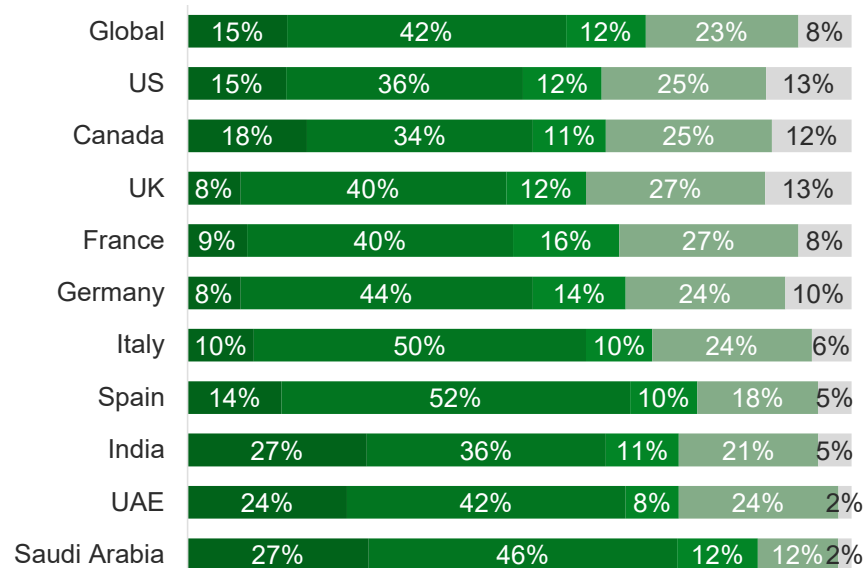
Frequency of listening to summaries or highlights
By country

■ Daily ■ Weekly ■ Monthly ■ Sometimes ■ Never



Frequency of listening to live sporting events
By country

■ Daily ■ Weekly ■ Monthly ■ Sometimes ■ Never

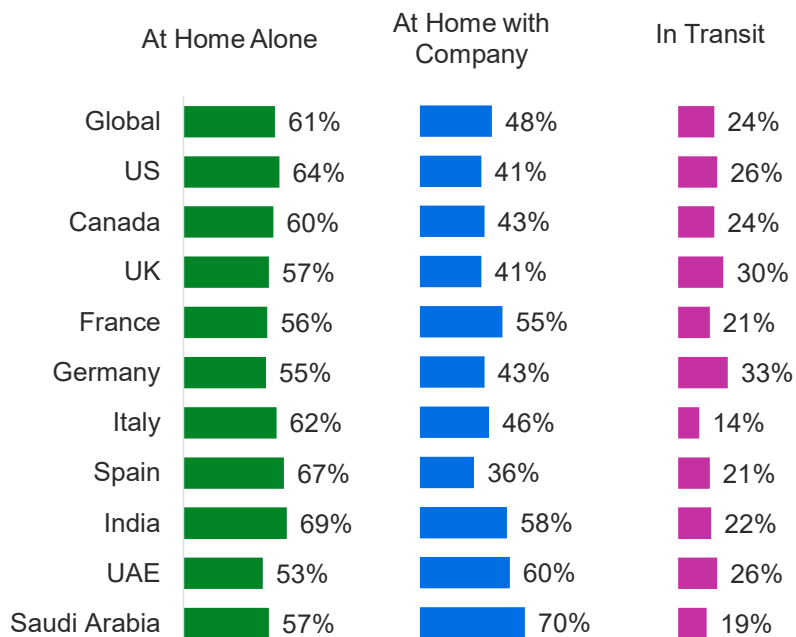


WATCHING AND LISTENING HABITS

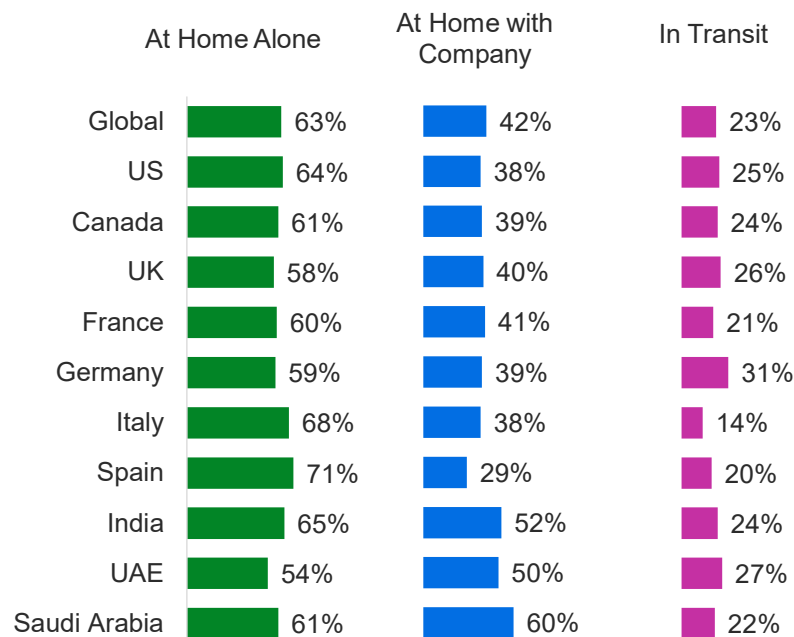
Listeners of sporting events are most likely to watch at home alone, followed by at home with others; Listening while in transit is the third most common way fans listen to sports

IBM8 Where are you most likely to listen to live sporting events? Please select up to three of your top choices. // IBM9 Where are you most likely to listen to sporting event summaries or highlights? Please select up to three of your top choices.

Top 3 places to listen to live sporting events
By country, among those who listen



Top 3 places to listen to sporting event highlights
By country, among those who listen

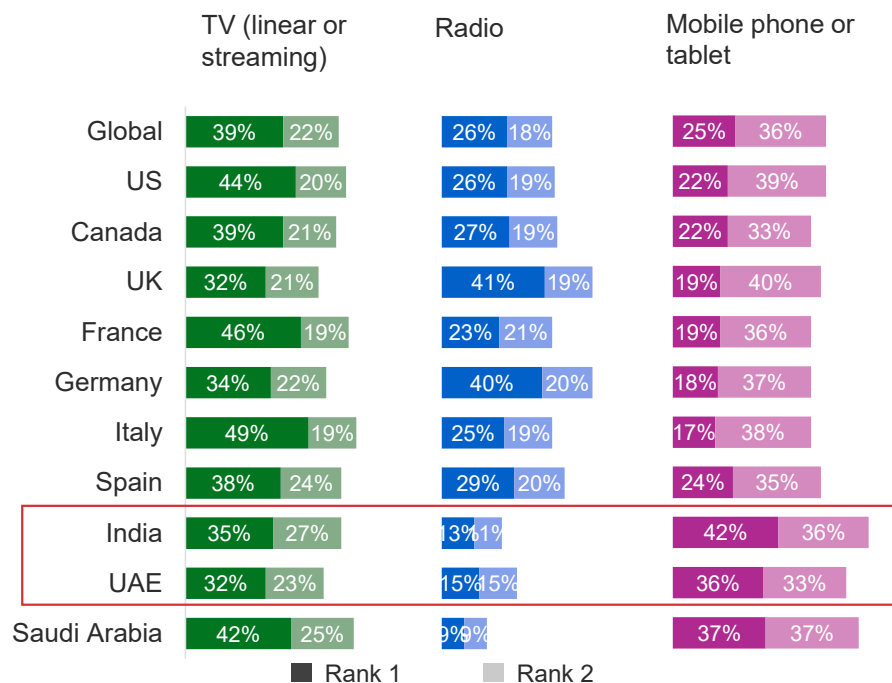


WATCHING AND LISTENING HABITS

Like viewership, TV ranks as the number 1 way to listen to sporting events; Fans in India and the UAE are most likely to listen via their mobile device

IBM10 What device do you most typically use to listen to sporting events? Please rank the top 5 options, with 1 being the most likely to use and 5 being the fifth most likely to use.

Ranking of top 2 devices used to listen to sports
By country, among those who listen



Percentage of respondents who marked mobile phone or tablet as top device
By age/country, among those who listen

	18-29	30-44	45-54	55+
Global	39%	29%	20%	13%
US	36%	29%	21%	12%
Canada	33%	29%	21%	10%
UK	35%	25%	14%	11%
France	36%	19%	18%	12%
Germany	32%	21%	18%	8%
Italy	31%	20%	15%	12%
Spain	40%	27%	19%	15%
India	47%	38%	39%	26%
UAE	42%	38%	34%	27%
Saudi Arabia	42%	37%	36%	31%

MARKET OVERVIEW: SPORTING EVENT CONSUMPTION

Preferences & Behaviors



PREFERENCES & BEHAVIORS

Across all sports and on a global level, watching sporting events live is the most popular among sports fans

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

Global: Methods used to watch favorite sporting events
By sport

	Live	Watching highlight clips on social media	Watching highlight clips on an official website	On-demand clips of packaged highlights	Full on-demand replay	On-demand, manually skipping to parts I am interested in
Soccer	45%	20%	15%	12%	11%	9%
Cricket	11%	6%	6%	3%	3%	3%
Tennis	21%	8%	7%	5%	5%	4%
Basketball	18%	10%	8%	6%	5%	5%
Baseball	9%	4%	3%	2%	2%	2%
Rugby	5%	2%	2%	1%	1%	1%
Golf	7%	3%	2%	2%	2%	2%
American football	14%	6%	5%	3%	3%	3%
F1 racing	18%	7%	5%	4%	5%	3%
Track and field	12%	4%	3%	2%	3%	2%
Swimming	12%	6%	5%	3%	4%	4%
Olympics	29%	9%	8%	6%	6%	6%

Please refer to the appendix for the country breakouts.

PREFERENCES & BEHAVIORS

Foundational features, like video quality and platform findability, are more critical than added value features, such as exclusive content and fan engagement, when fans are picking a platform to watch a sporting event

IBM12 How important are the following criteria when selecting a platform to watch a sporting event?

Most important factors for selecting a sports viewing platform, Very important
By country

	Video quality	Platform findability	Exclusive game/player content	Fan engagement
Global	61%	53%	25%	21%
US	64%	54%	25%	22%
Canada	65%	56%	21%	18%
UK	64%	53%	17%	14%
France	45%	39%	17%	12%
Germany	47%	43%	18%	15%
Italy	50%	41%	15%	11%
Spain	64%	55%	26%	15%
India	75%	66%	43%	37%
UAE	72%	67%	46%	42%
Saudi Arabia	72%	65%	44%	37%

Age Highlights

- UAE fans 45+ are more likely than younger UAE fans to consider added value content important.

Note: Please refer to the appendix for the full age breakout by country.

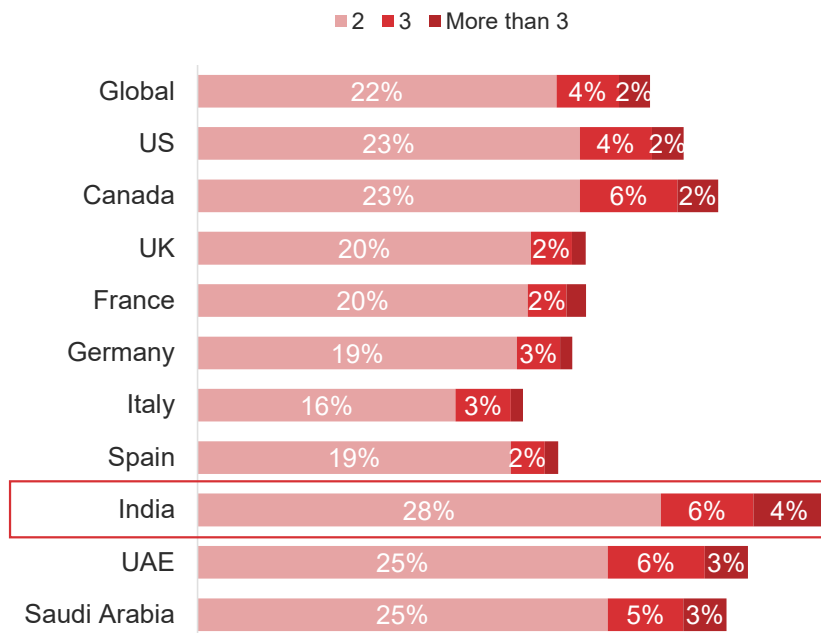
Full Statements: The video quality of the event itself Ability to find and access the platform easily Additional content and data around the players and/or game that other platforms do not offer Ability to engage with other fans and viewers on the platform (i.e., live chat, comments, share content)

PREFERENCES & BEHAVIORS

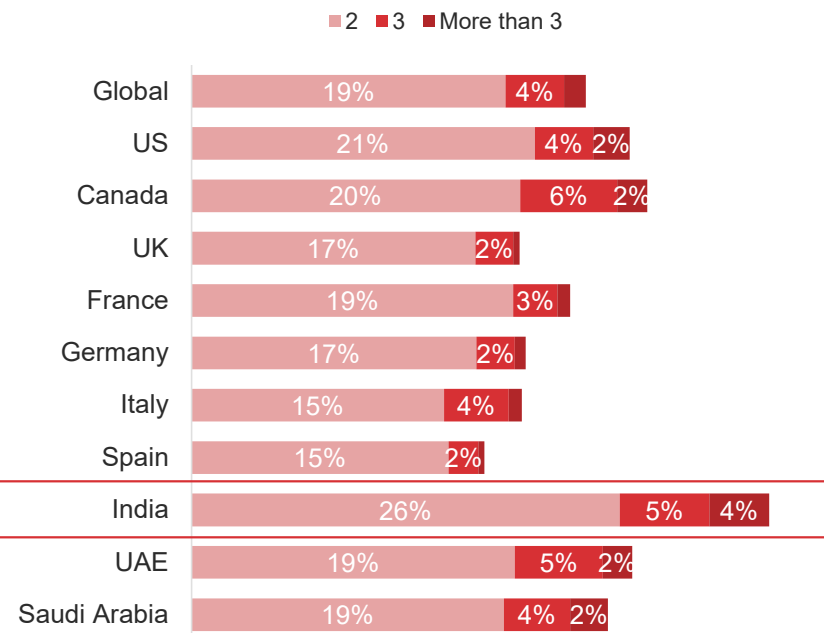
Sports fans in India are most likely to utilize multiple devices at the same time while watching or listening to sports, with over 1 in 4 saying they use at least 2 devices

IBM13 When watching and/or listening to a sporting event, do you typically use multiple devices at once? IBM14 How many devices are you typically using while watching and/or listening to a sporting event?

Multi-device use while watching sporting events
By country



Multi-device use while listening to sporting events
By country



PREFERENCES & BEHAVIORS

Younger generations are using multiple devices to watch sports at higher levels than older generations, especially in Canada

IBM13 When watching and/or listening to a sporting event, do you typically use multiple devices at once? IBM14 How many devices are you typically using while watching and/or listening to a sporting event?

Multi-device while watching sporting events, 3 or more
By age/country

	18-29	30-44	45-54	55+
Global	10%	7%	3%	2%
US	12%	9%	8%	1%
Canada	21%	11%	2%	1%
UK	7%	5%	2%	1%
France	7%	5%	2%	2%
Germany	8%	5%	1%	1%
Italy	7%	6%	5%	1%
Spain	7%	3%	3%	1%
India	10%	11%	7%	6%
UAE	10%	10%	2%	7%
Saudi Arabia	11%	8%	5%	2%

Multi-device while watching sporting events, 3 or more
By age/country

	18-29	30-44	45-54	55+
Global	9%	7%	3%	1%
US	11%	8%	9%	1%
Canada	22%	9%	2%	1%
UK	6%	4%	2%	1%
France	6%	5%	2%	2%
Germany	6%	5%	2%	1%
Italy	7%	7%	5%	2%
Spain	5%	2%	2%	1%
India	9%	12%	6%	6%
UAE	7%	9%	1%	4%
Saudi Arabia	8%	7%	4%	2%

PREFERENCES & BEHAVIORS

Multi-tasking is the top reason fans use multiple devices when consuming sports; In Saudi Arabia, fans are most likely to be using multiple devices to interact with other fans

IBM15 Why do you use multiple devices while watching and/or listening to a sporting event? Please select all that apply..

Reasons for multi-device use while watching sporting events

By country, among those who use 2 or more devices to watch

	Multi-tasking	Getting more game info	Interacting with fans	Watching multiple games
Global	45%	41%	29%	29%
US	53%	38%	27%	34%
Canada	50%	31%	20%	27%
UK	50%	41%	26%	26%
France	45%	43%	20%	25%
Germany	43%	40%	24%	31%
Italy	39%	34%	24%	27%
Spain	39%	40%	21%	31%
India	46%	51%	42%	26%
UAE	38%	52%	42%	33%
Saudi Arabia	41%	44%	46%	29%

Full Statements: I am multi-tasking, I like to get more information on player and/or team statistics while watching a game. I like to interact with other fans while watching a game. I like to watch multiple sports games at once.

Reasons for multi-device use while listening to sporting events

By country, among those who use 2 or more devices to listen

	Multi-tasking	Getting more game info	Interacting with fans	Watching multiple games
Global	48%	37%	28%	26%
US	54%	34%	29%	31%
Canada	52%	27%	24%	26%
UK	58%	33%	21%	20%
France	46%	36%	24%	25%
Germany	50%	37%	26%	28%
Italy	42%	36%	20%	25%
Spain	40%	42%	19%	25%
India	47%	42%	38%	27%
UAE	47%	47%	37%	28%
Saudi Arabia	38%	42%	48%	27%

Full Statements: I am multi-tasking, I like to get more information on player and/or team statistics while watching a game. I like to interact with other fans while watching a game. I like to watch multiple sports games at once.

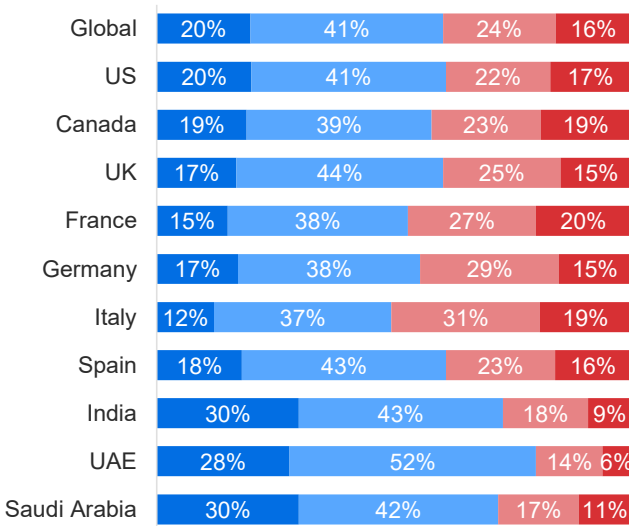
PREFERENCES & BEHAVIORS

India, the UAE, and Saudi Arabia are driving global agreement in 'willingness to disrupt sleep' and 'willingness to move meetings' in order to watch sports games

IBM16 If a game is occurring in a different time zone, to what extent do you agree with the following statements?

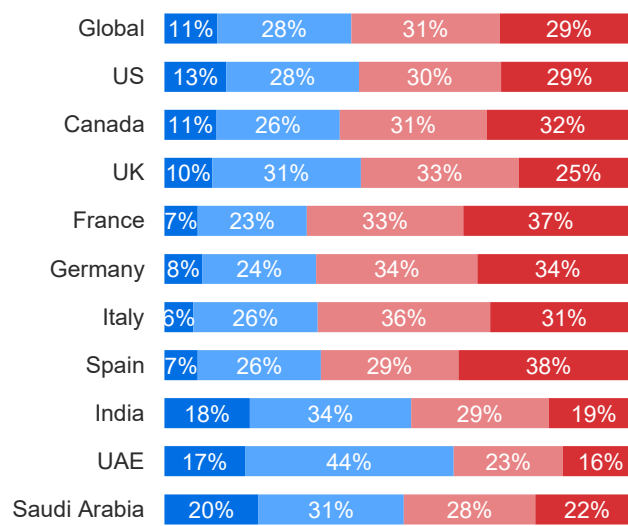
Willing to wake up at an inopportune time to watch a sports game I am interested in
By country

■ Strongly agree ■ Somewhat agree
■ Somewhat disagree ■ Strongly disagree



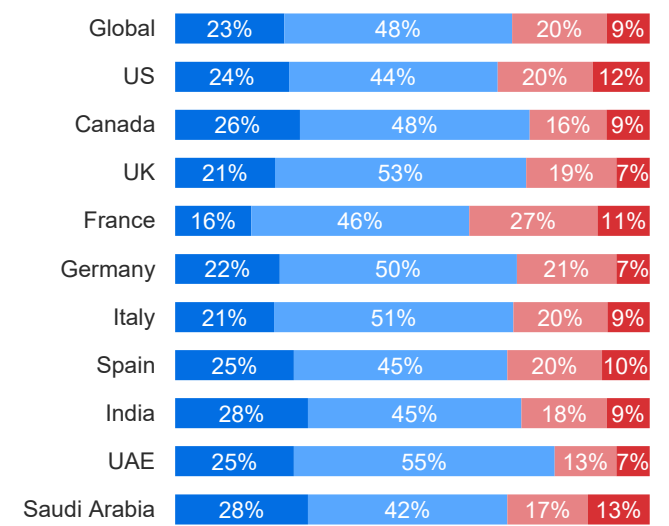
Willing to move meetings and/or miss classes to catch a sports game I am interested in
By country

■ Strongly agree ■ Somewhat agree
■ Somewhat disagree ■ Strongly disagree



Willing to miss a live sports game and watch a replay after if the time is not convenient for me
By country

■ Strongly agree ■ Somewhat agree
■ Somewhat disagree ■ Strongly disagree



PREFERENCES & BEHAVIORS

Saudi sports fans 55+ are more likely than younger fans to be willing to wake up at inopportune times or move around their schedule to catch a game

IBM16 If a game is occurring in a different time zone, to what extent do you agree with the following statements?

Willing to wake up at an inopportune time to watch a sports game I am interested in, Strongly agree
By age/country

	18-29	30-44	45-54	55+
Global	22%	22%	20%	15%
US	18%	26%	23%	15%
Canada	28%	21%	15%	13%
UK	18%	20%	19%	13%
France	18%	13%	17%	14%
Germany	16%	20%	17%	15%
Italy	11%	12%	12%	13%
Spain	19%	18%	22%	15%
India	27%	31%	36%	28%
UAE	33%	33%	32%	11%
Saudi Arabia	24%	28%	28%	47%

Willing move meetings and/or miss classes to catch a sports game I am interested in, Strongly agree
By age/country

	18-29	30-44	45-54	55+
Global	13%	13%	10%	8%
US	14%	17%	12%	10%
Canada	18%	13%	10%	5%
UK	10%	11%	11%	9%
France	8%	7%	6%	6%
Germany	8%	10%	7%	6%
Italy	6%	7%	5%	7%
Spain	11%	5%	8%	4%
India	15%	21%	19%	13%
UAE	14%	19%	28%	9%
Saudi Arabia	15%	15%	14%	47%

Willing to miss a live sports game and watch a replay after if the time is not convenient for me, Strongly agree
By age/country

	18-29	30-44	45-54	55+
Global	24%	25%	23%	21%
US	28%	25%	24%	21%
Canada	31%	27%	24%	23%
UK	20%	21%	23%	19%
France	16%	18%	14%	16%
Germany	23%	21%	23%	21%
Italy	23%	18%	18%	22%
Spain	29%	26%	22%	24%
India	24%	32%	38%	24%
UAE	25%	29%	35%	10%
Saudi Arabia	24%	26%	19%	46%



Market Overview

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Technology's Role in Sports

SPORTS CONTENT ENGAGEMENT

In addition to sporting events, sports fans across all sports are most likely to interact with video highlights and news coverage

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

Global: Engagement in additional content
By sport

	Video Highlights	News coverage (broadcast / televised reports)	News Articles	Social media accounts / posts	Mobile sports apps	Team/league websites	Podcasts	Fan forums or discussion boards	Blogs/fan websites	Other	None of the above
Soccer	30%	24%	22%	22%	19%	18%	9%	9%	8%	1%	4%
Cricket	9%	6%	7%	8%	6%	4%	3%	3%	3%	0%	1%
Tennis	13%	11%	11%	8%	6%	5%	3%	3%	3%	1%	3%
Basketball	14%	11%	9%	10%	8%	7%	4%	4%	4%	1%	2%
Baseball	6%	6%	5%	5%	3%	3%	2%	1%	2%	0%	1%
Rugby	3%	3%	3%	2%	1%	2%	1%	1%	1%	0%	1%
Golf	4%	4%	3%	2%	2%	2%	1%	1%	1%	0%	1%
American football	10%	8%	7%	7%	6%	5%	3%	3%	2%	0%	2%
F1 racing	12%	10%	9%	7%	6%	4%	3%	3%	3%	1%	2%
Track and field	7%	7%	6%	3%	3%	2%	1%	1%	1%	0%	2%
Swimming	8%	8%	7%	5%	4%	3%	3%	2%	2%	0%	3%
Olympics	18%	18%	15%	10%	7%	5%	4%	3%	3%	1%	4%

Please refer to the appendix for the country breakouts.

SPORTS CONTENT ENGAGEMENT

Soccer sees the highest daily engagement with additional content globally at 17%, followed by Cricket and Basketball at 6% each

IBM18 How often do you engage with additional content for each of the following sports?

Frequent additional sports content engagement, Daily
By country

	Soccer	Cricket	Tennis	Basketball	Baseball	Rugby	Golf	American Football	F1 racing	Track and field	Swimming	Olympics
Global	17%	6%	3%	6%	3%	1%	1%	4%	2%	1%	2%	5%
US	4%	1%	2%	16%	14%	1%	2%	17%	1%	2%	1%	8%
Canada	7%	1%	5%	11%	11%	0%	5%	6%	2%	1%	6%	10%
UK	28%	4%	4%	2%	0%	3%	2%	1%	3%	1%	1%	5%
France	12%	0%	3%	2%	0%	2%	0%	0%	1%	2%	1%	2%
Germany	22%	0%	2%	3%	1%	0%	1%	2%	2%	2%	1%	7%
Italy	17%	0%	5%	2%	0%	0%	0%	0%	3%	2%	1%	6%
Spain	12%	0%	2%	3%	0%	0%	0%	0%	2%	1%	1%	2%
India	15%	40%	4%	3%	1%	1%	1%	2%	2%	1%	2%	4%
UAE	29%	7%	3%	12%	1%	0%	1%	2%	2%	1%	2%	2%
Saudi Arabia	40%	1%	1%	10%	0%	0%	0%	2%	3%	0%	1%	1%

Age Highlights

- Sports fans 55+ globally are more likely to be interacting with additional Olympics' content daily than younger age groups.
- 51% of Saudi sports fans over 55+ engage with soccer content daily, compared to around 40% or less of younger age groups.

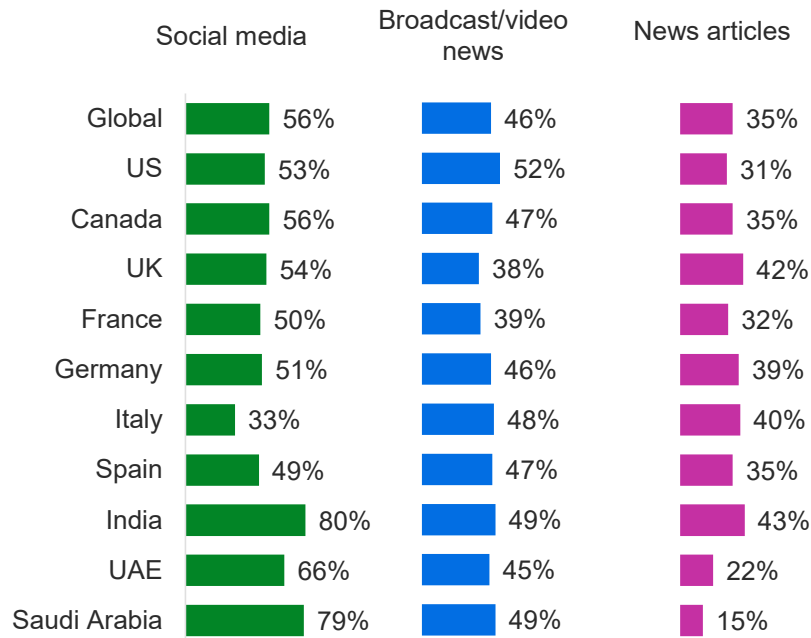
Note: Please refer to the appendix for the full age breakout by country.

SPORTS CONTENT ENGAGEMENT

Additional sports content is most often consumed through social media, although fans 55+ are more inclined to use interact with additional content through broadcasting

IBM19 How do you most often consume additional news and content around your favorite sports/teams/players? Please select up to three.

Top 3 sources for additional sports content
By country, among those engaging with additional content



Top source for additional sports content, Top 1
By age/country, among those engaging with additional content

	18-29	30-44	45-54	55+
Global	Social	Social	Social	Broadcast
US	Social	Social	Broadcast	Broadcast
Canada	Social	Social	Social	Broadcast
UK	Social	Social	Social	Articles
France	Social	Social	Social	Radio
Germany	Social	Social	Broadcast	Broadcast
Italy	Social	Broadcast	Broadcast	Broadcast
Spain	Social	Social	Broadcast* Social*	Broadcast
India	Social	Social	Social	Social
UAE	Social	Social	Social	Broadcast
Saudi Arabia	Social	Social	Social	Social

Social
= Social Media

Broadcast
= Broadcast/video news

Articles
= News articles (print/digital)

Radio
= Radio

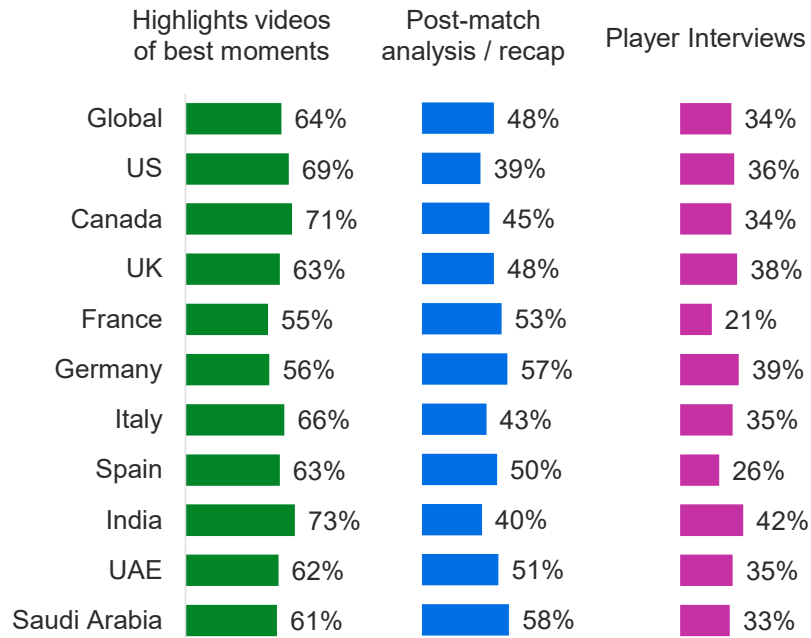
*Tied for top 1

SPORTS CONTENT ENGAGEMENT

Fans engaging with additional sports content are most likely to be consuming highlight videos of best moments, followed by post-match recaps

IBM20 What kind of information are you consuming most? Select up to three.

Top 3 consumed types of additional sports information
By country, among those engaging with additional content



Top consumed type of additional sports information
By age/country, among those engaging with additional content

	18-29	30-44	45-54	55+
Global	Highlights	Highlights	Highlights	Highlights
US	Highlights	Highlights	Highlights	Highlights
Canada	Highlights	Highlights	Highlights	Highlights
UK	Highlights	Highlights	Highlights	Highlights
France	Highlights	Recap	Highlights	Recap
Germany	Highlights	Highlights	Recap	Recap
Italy	Highlights	Highlights	Highlights	Highlights
Spain	Highlights	Highlights	Highlights	Highlights
India	Highlights	Highlights	Highlights	Highlights
UAE	Highlights	Highlights	Highlights	Highlights
Saudi Arabia	Highlights	Highlights	Highlights	Recap

Highlights
= Highlights videos of best moments

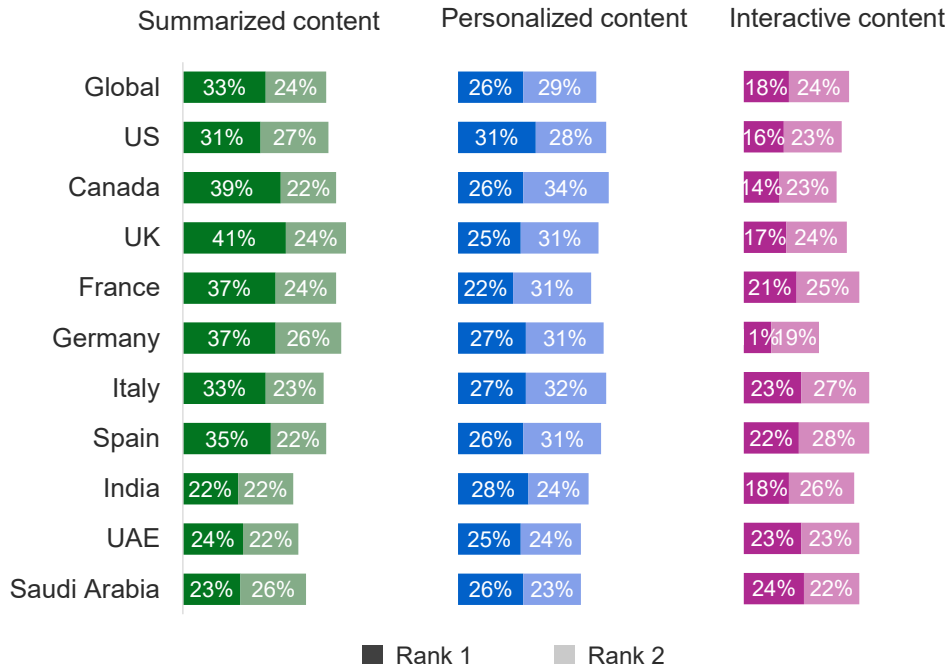
Recap
= Post-match analysis / recap

SPORTS CONTENT ENGAGEMENT

Fans 18-29 are more likely to rank personalized content as their top priority when consuming sports content

IBM21 When consuming sports content, which would be most important to you? Please rank in order of importance, with 1 being the most important and 5 being the fifth most important.

Ranking of top 2 most important sports content criteria
By country, among those engaging with additional content



Most important aspect of sports content, Rank 1
By age/country, among those engaging with additional content

	18-29	30-44	45-54	55+
Global	Personal	Summary	Summary	Summary
US	Personal	Personal	Personal	Summary
Canada	Personal	Summary	Summary	Summary
UK	Summary	Summary	Summary	Summary
France	Summary	Summary	Summary	Summary
Germany	Summary	Summary	Summary	Summary
Italy	Summary	Summary	Summary	Summary
Spain	Personal	Summary	Summary	Summary
India	Personal	Personal	Personal	Summary
UAE	Personal	Personal* Interactive*	Personal* Summary*	Summary
Saudi Arabia	Personal	Personal	Summary	Interactive

Summary
= I want summarized content that saves me time

Personal
= I want personalized content based on my preferences (my favorite athletes, sports teams, etc.)

Interactive
= I want interactive content

*Tied for top 1



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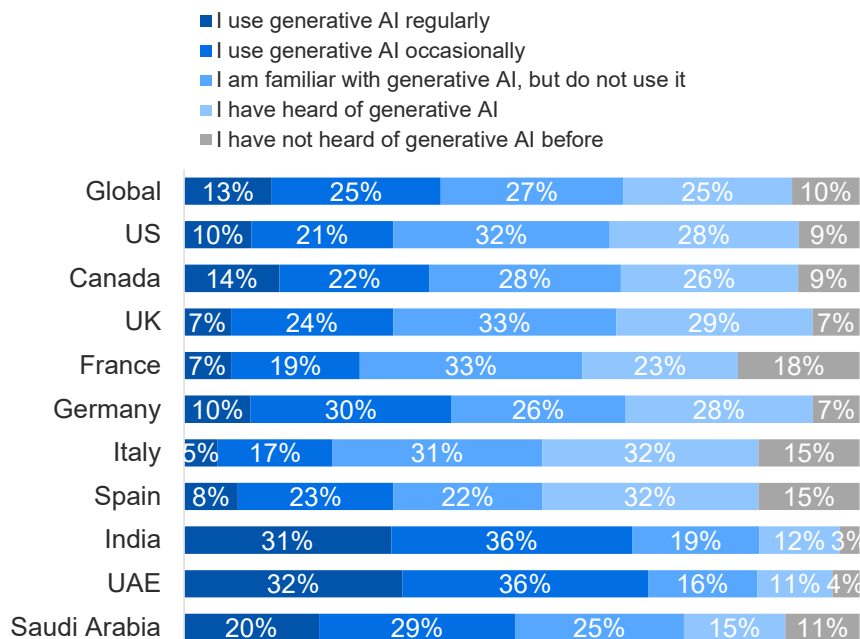
Technology's Role in Sports

TECHNOLOGY'S ROLE IN SPORTS

Sports fans in India and the UAE are most likely to be using generative AI

IBM22 Which of these best describes your knowledge of generative AI (e.g., ChatGPT)?

Familiarity with GenAI
By country



Users of GenAI, Regular + Occasional users
By age/country

	18-29	30-44	45-54	55+
Global	55%	42%	35%	25%
US	39%	43%	34%	19%
Canada	62%	45%	31%	18%
UK	43%	37%	35%	20%
France	42%	26%	26%	17%
Germany	56%	42%	43%	24%
Italy	41%	22%	21%	17%
Spain	50%	32%	30%	18%
India	70%	65%	61%	54%
UAE	68%	58%	68%	92%
Saudi Arabia	50%	39%	35%	88%

TECHNOLOGY'S ROLE IN SPORTS

Real-time updates is a top priority when sports fans consider the ways generative AI can improve their engagement with sports

IBM23 If generative AI could improve the way you engage with your favorite sports in the future, how would you prioritize the following areas?

Top priorities for GenAI improvements, High priority
By country, among those who have at least heard of AI

	Real-Time Updates	Personalized Content	Unique Insights	Meaningful Predictions	Voice Interfaces	Engagement opportunities
Global	34%	29%	28%	26%	24%	20%
US	31%	26%	23%	21%	20%	18%
Canada	30%	24%	23%	21%	19%	16%
UK	27%	19%	19%	17%	13%	10%
France	25%	21%	22%	17%	17%	12%
Germany	29%	20%	20%	16%	16%	14%
Italy	25%	17%	16%	16%	15%	10%
Spain	30%	29%	27%	23%	25%	15%
India	52%	48%	47%	46%	43%	39%
UAE	53%	52%	48%	50%	47%	44%
Saudi Arabia	50%	50%	49%	49%	48%	41%

Full Statements: Keep you updated in real-time on how a player or team is/are doing in their match | Provide content that is personalized around your preferred players, teams and the tournament so it's more relevant for you | Provide more unique insights into a player's and/or team's performance | Provide meaningful predictions about how a player or team will perform in their next match | Interactive voice interfaces (being able to directly ask an AI assistant to provide insights/recaps on the match/event) | Provide opportunities to engage with more fans and/or build new fan communities around the athletes and/or sports teams I follow.

TECHNOLOGY'S ROLE IN SPORTS

Younger fans are more likely to rate AI improvements as high-priority, with the biggest differences seen in personalized sports content and meaningful game predictions

IBM23 If generative AI could improve the way you engage with your favorite sports in the future, how would you prioritize the following areas?

Top priorities for GenAI improvements, High priority
By age/country, among those who have at least heard of GenAI

	Real-Time Updates				Personalized Content				Unique Insights				Meaningful Predictions				Voice Interfaces				Engagement Opportunities				
	Age	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+
Global		40%	37%	33%	26%	36%	33%	28%	19%	35%	31%	26%	19%	33%	30%	24%	16%	31%	28%	23%	16%	27%	24%	17%	12%
US		36%	33%	36%	26%	35%	33%	28%	16%	29%	30%	25%	14%	28%	29%	23%	12%	26%	29%	21%	11%	25%	26%	18%	8%
Canada		44%	34%	26%	20%	35%	29%	18%	15%	38%	28%	17%	11%	34%	27%	14%	9%	33%	22%	14%	9%	29%	22%	7%	4%
UK		34%	32%	28%	19%	29%	26%	18%	11%	27%	24%	17%	11%	24%	23%	20%	7%	19%	18%	14%	5%	19%	13%	12%	4%
France		31%	25%	26%	21%	25%	22%	22%	17%	27%	24%	23%	17%	24%	17%	17%	12%	21%	17%	18%	14%	19%	12%	13%	6%
Germany		30%	31%	33%	23%	26%	26%	22%	10%	28%	20%	22%	14%	20%	19%	17%	11%	18%	19%	17%	11%	20%	18%	12%	7%
Italy		31%	24%	25%	24%	24%	18%	19%	13%	17%	18%	16%	15%	21%	18%	15%	13%	22%	16%	16%	12%	17%	13%	9%	6%
Spain		31%	32%	33%	25%	38%	27%	31%	22%	32%	26%	29%	22%	32%	24%	24%	15%	33%	24%	28%	19%	23%	16%	14%	9%
India		50%	55%	53%	42%	45%	52%	52%	42%	45%	50%	53%	40%	42%	51%	48%	44%	40%	44%	53%	37%	36%	43%	42%	30%
UAE		50%	51%	57%	54%	44%	48%	63%	59%	42%	46%	58%	52%	44%	46%	57%	59%	41%	42%	54%	58%	34%	36%	54%	62%
Saudi Arabia		43%	46%	45%	78%	46%	45%	44%	79%	45%	42%	42%	78%	44%	41%	49%	79%	44%	41%	35%	80%	32%	35%	31%	78%

Full Statements: Keep you updated in real-time on how a player or team is/are doing in their match.

Provide content that is personalized around your preferred players, teams and the tournament so it's more relevant for you (e.g., prioritizing your favorite players, best moments from matches, etc.).

Provide more unique insights into a player's and/or team's performance.

Provide meaningful predictions about how a player or team will perform in their next match.

Interactive voice interfaces (being able to directly ask an AI assistant to provide insights/recaps on the match/event).

Provide opportunities to engage with more fans and/or build new fan communities around the athletes and/or sports teams I follow.

TECHNOLOGY'S ROLE IN SPORTS

Overall, sports fans are optimistic regarding the impact of technology on sports, especially when it comes to data analytics, wearable tech, and hawk-eye tech

IBM24 What impact do you think the following technologies will have on sports?

Positive impact of technologies on sports, Very + Somewhat positive
By country

	Data Analytics	Wearable Technology	Hawk-Eye Technology (for ball tracking)	Video Assistant Referee	Virtual Reality (VR)	Artificial Intelligence (AI)	Augmented Reality (AR)
Global	63%	59%	59%	57%	53%	50%	50%
US	54%	50%	48%	42%	42%	40%	38%
Canada	59%	54%	53%	48%	47%	42%	44%
UK	57%	56%	63%	43%	42%	37%	37%
France	54%	53%	49%	57%	45%	41%	42%
Germany	55%	43%	51%	55%	40%	39%	41%
Italy	55%	49%	50%	53%	44%	42%	43%
Spain	67%	63%	64%	67%	57%	56%	59%
India	82%	78%	74%	74%	76%	77%	71%
UAE	84%	82%	80%	83%	80%	82%	79%
Saudi Arabia	78%	79%	76%	80%	75%	75%	72%

Age Highlights

- Fans 18-29 are particularly hopeful about the impact of wearable tech, with 67% believing it will have a positive effect on sports.
- Fans 55+ are less enthusiastic about the impacts of technology on sports.

Note: Please refer to the appendix for the full age breakout by country.

TECHNOLOGY'S ROLE IN SPORTS

Fans 55+ are generally less enthusiastic regarding the impact of technology in sports, especially when it comes to wearable tech's impact

IBM24 What impact do you think the following technologies will have on sports?

Positive impact of technologies on sports, Very + Somewhat positive
By age/country

Age	Data analytics				Hawk-Eye technology				Wearable technology				Video assistant referee (VAR)				Virtual reality (VR)				Artificial intelligence (AI)				Augmented Reality (AR)			
	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+
Global	69%	68%	64%	53%	62%	63%	59%	53%	67%	64%	59%	45%	60%	62%	58%	50%	61%	58%	52%	40%	58%	55%	50%	40%	58%	55%	50%	39%
US	62%	60%	55%	45%	52%	53%	48%	44%	61%	59%	53%	37%	45%	50%	44%	33%	49%	50%	44%	33%	44%	49%	44%	30%	41%	49%	41%	30%
Canada	72%	68%	56%	45%	68%	58%	47%	42%	70%	65%	49%	36%	63%	56%	44%	35%	65%	55%	43%	32%	60%	52%	37%	27%	63%	54%	38%	28%
UK	59%	63%	65%	47%	55%	65%	66%	62%	61%	64%	64%	42%	48%	47%	42%	38%	52%	51%	43%	31%	41%	48%	40%	27%	49%	44%	41%	25%
France	56%	56%	56%	52%	48%	50%	50%	48%	56%	54%	56%	47%	52%	56%	58%	59%	50%	45%	47%	40%	40%	41%	43%	41%	45%	46%	45%	37%
Germany	58%	59%	60%	46%	50%	53%	55%	48%	50%	49%	44%	32%	51%	58%	56%	54%	44%	44%	43%	31%	43%	42%	42%	29%	42%	44%	44%	35%
Italy	61%	59%	56%	50%	57%	54%	47%	47%	59%	53%	52%	41%	52%	56%	53%	50%	51%	47%	45%	39%	48%	43%	43%	40%	53%	46%	45%	37%
Spain	70%	65%	72%	65%	64%	66%	69%	56%	65%	65%	68%	54%	63%	66%	71%	64%	60%	59%	60%	50%	56%	57%	58%	53%	60%	63%	61%	50%
India	78%	83%	89%	79%	73%	76%	80%	78%	77%	78%	82%	76%	70%	78%	76%	79%	74%	77%	81%	73%	74%	79%	81%	81%	69%	75%	76%	72%
UAE	74%	81%	90%	96%	71%	75%	85%	98%	80%	76%	88%	95%	77%	78%	84%	97%	78%	72%	83%	95%	78%	76%	85%	97%	72%	72%	82%	97%
Saudi Arabia	74%	76%	77%	93%	70%	75%	76%	94%	77%	78%	74%	93%	74%	81%	78%	92%	69%	74%	74%	91%	70%	73%	75%	92%	65%	70%	73%	93%

Full Statements: Data analytics (performance tracking, predictive analytics)

Hawk-Eye technology (for ball tracking)

Wearable technology (fitness trackers, smart clothing, etc.)

Virtual reality (VR) (immersive experiences, training simulations)

Augmented Reality (AR) (interactive fan experiences, enhanced broadcasts)

TECHNOLOGY'S ROLE IN SPORTS

Continually, most sports fans also believe that technology will positively impact the advancement of sports in various areas

IBM25 What impact do you think technology will have on the advancement of sports in the following areas?

Perceived positive impact of different technologies on the advancement of sports, Very + Somewhat positive
By country

	Training	Sports Medicine/ Rehabilitation	Game Strategy	Coaching	Injury Prevention	Talent Identification & Acquisitions	Fan Engagement
Global	70%	70%	70%	67%	65%	62%	58%
US	65%	63%	62%	59%	60%	56%	55%
Canada	71%	69%	67%	66%	65%	61%	58%
UK	67%	66%	64%	65%	59%	53%	51%
France	64%	65%	63%	61%	60%	52%	42%
Germany	57%	61%	62%	56%	51%	54%	45%
Italy	64%	69%	65%	50%	62%	52%	49%
Spain	75%	76%	76%	72%	72%	67%	63%
India	85%	79%	84%	82%	75%	80%	75%
UAE	88%	87%	89%	87%	82%	85%	81%
Saudi Arabia	85%	83%	84%	86%	82%	85%	76%

TECHNOLOGY'S ROLE IN SPORTS

On average, Canadian fans 18-29 are more enthusiastic than the global average regarding the impact of tech on sports

IBM25 What impact do you think technology will have on the advancement of sports in the following areas?

Perceived Positive impact of different technologies on the advancement of sports, Very + Somewhat positive
By age/country

Age	Training				Game strategy				Sports medicine/rehabilitation				Coaching				Injury prevention				Talent identification & acquisition				Fan engagement			
	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+
Global	71%	73%	70%	68%	72%	73%	70%	65%	69%	72%	70%	70%	69%	70%	66%	62%	66%	68%	65%	63%	66%	67%	62%	55%	64%	63%	58%	47%
US	61%	67%	66%	63%	62%	66%	64%	58%	58%	65%	62%	65%	60%	61%	60%	57%	58%	62%	59%	59%	60%	59%	58%	51%	57%	62%	60%	47%
Canada	77%	75%	71%	65%	75%	71%	64%	59%	75%	74%	72%	61%	74%	70%	65%	58%	74%	69%	64%	55%	71%	68%	59%	49%	73%	64%	56%	44%
UK	63%	70%	70%	67%	64%	69%	67%	58%	60%	63%	67%	68%	61%	65%	67%	64%	55%	58%	61%	60%	60%	61%	53%	46%	57%	58%	53%	42%
France	57%	64%	63%	70%	62%	62%	64%	64%	57%	63%	63%	70%	55%	61%	59%	65%	60%	57%	60%	62%	53%	55%	50%	51%	50%	47%	40%	36%
Germany	54%	59%	57%	55%	61%	65%	61%	60%	59%	62%	60%	62%	56%	61%	56%	51%	53%	53%	51%	46%	53%	60%	56%	49%	51%	53%	45%	35%
Italy	65%	63%	63%	65%	65%	67%	66%	64%	65%	68%	65%	73%	58%	55%	51%	45%	56%	63%	61%	63%	54%	55%	51%	51%	54%	54%	51%	44%
Spain	70%	74%	77%	76%	73%	73%	80%	75%	68%	78%	77%	77%	66%	73%	73%	74%	68%	75%	74%	73%	63%	69%	70%	64%	62%	63%	66%	58%
India	82%	86%	94%	93%	82%	87%	87%	86%	77%	80%	84%	80%	79%	84%	94%	86%	71%	78%	83%	82%	76%	83%	88%	87%	75%	74%	84%	73%
UAE	82%	85%	92%	95%	78%	86%	94%	96%	82%	83%	92%	96%	82%	85%	91%	94%	75%	79%	88%	93%	77%	84%	89%	93%	71%	79%	85%	92%
Saudi Arabia	82%	85%	85%	96%	82%	84%	80%	94%	80%	82%	80%	95%	83%	86%	82%	95%	79%	81%	83%	94%	80%	84%	86%	95%	70%	75%	72%	96%



Sport overview

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Sporting Event Consumption

Watching & Listening Habits, Preferences & Behaviors

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Sports Content Engagement

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Technology's Role in Sports

SPORTS OVERVIEW: SPORTING EVENT CONSUMPTION

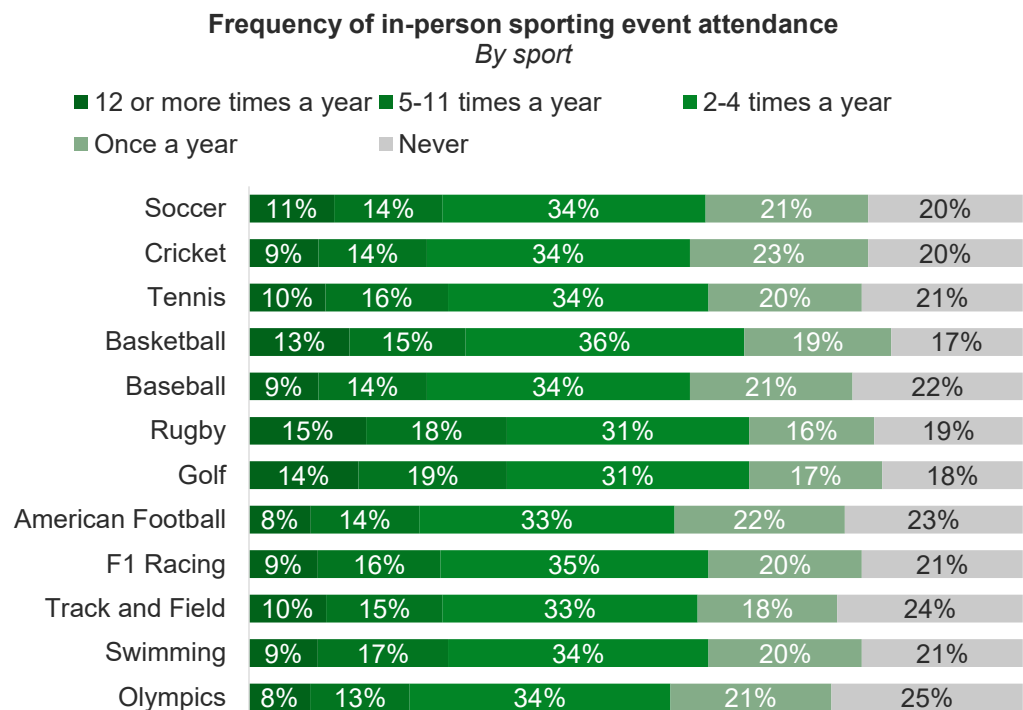
Watching & Listening Habits



WATCHING & LISTENING HABITS

Around 1 in 5 across fanbases never attend sporting events in-person in a typical year; Rugby, golf, and basketball fans attend the most in-person events

IBM1 In a typical year, how often do you attend sporting events in-person?

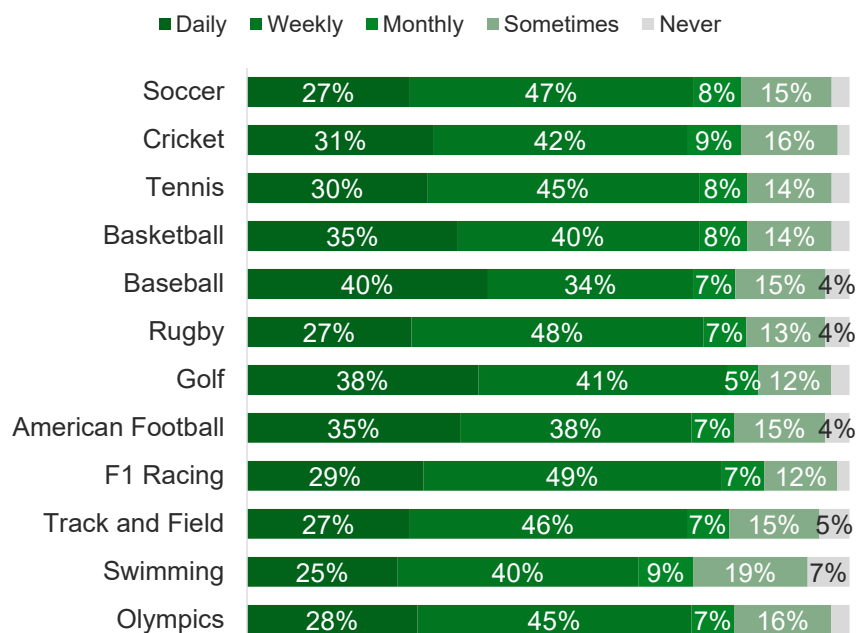


WATCHING & LISTENING HABITS

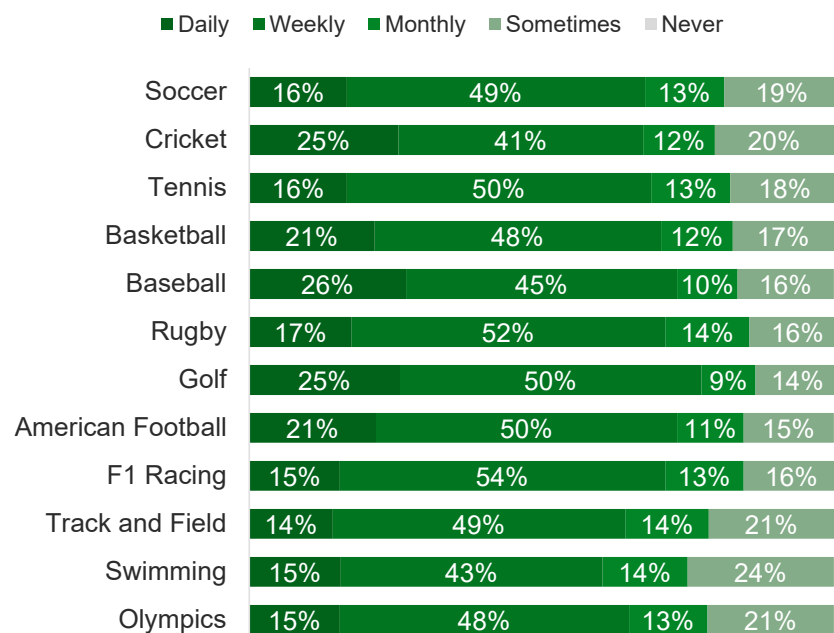
Most sports fans watch sporting summaries or live events weekly or more often; notably, around a quarter of cricket, baseball, and golf fans watch live events daily

IBM2 How often do you watch sporting events in the following formats?

Frequency of watching summaries or highlights
By sport



Frequency of watching live sporting events
By sport

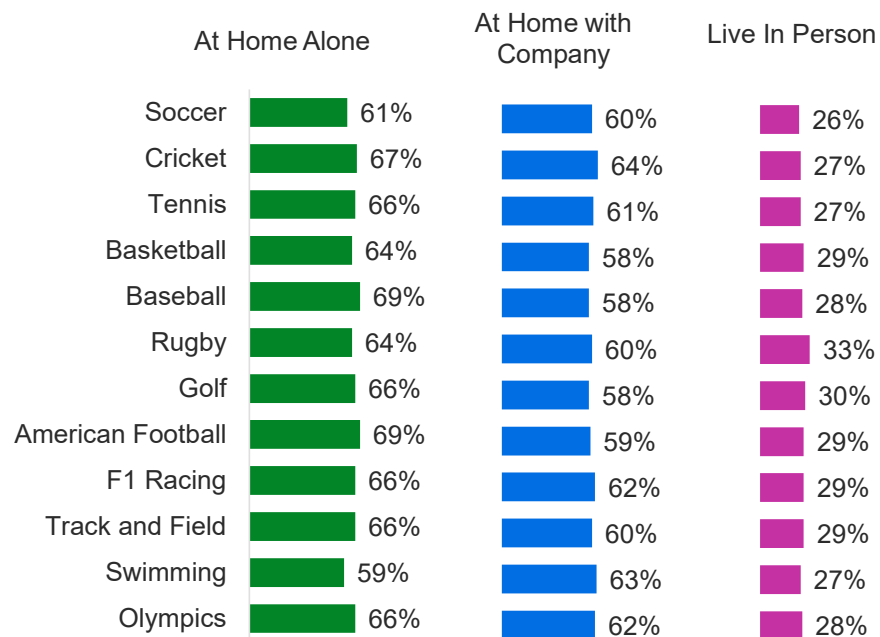


WATCHING & LISTENING HABITS

Fans across sports are most likely to watch live events in the comfort of their own home, either alone or with company

IBM3 Where are you most likely to watch live sporting events? Please select up to three of your top choices.

Most likely places to watch live sporting events, Top 3
By sport among those who watch



Other Highlights

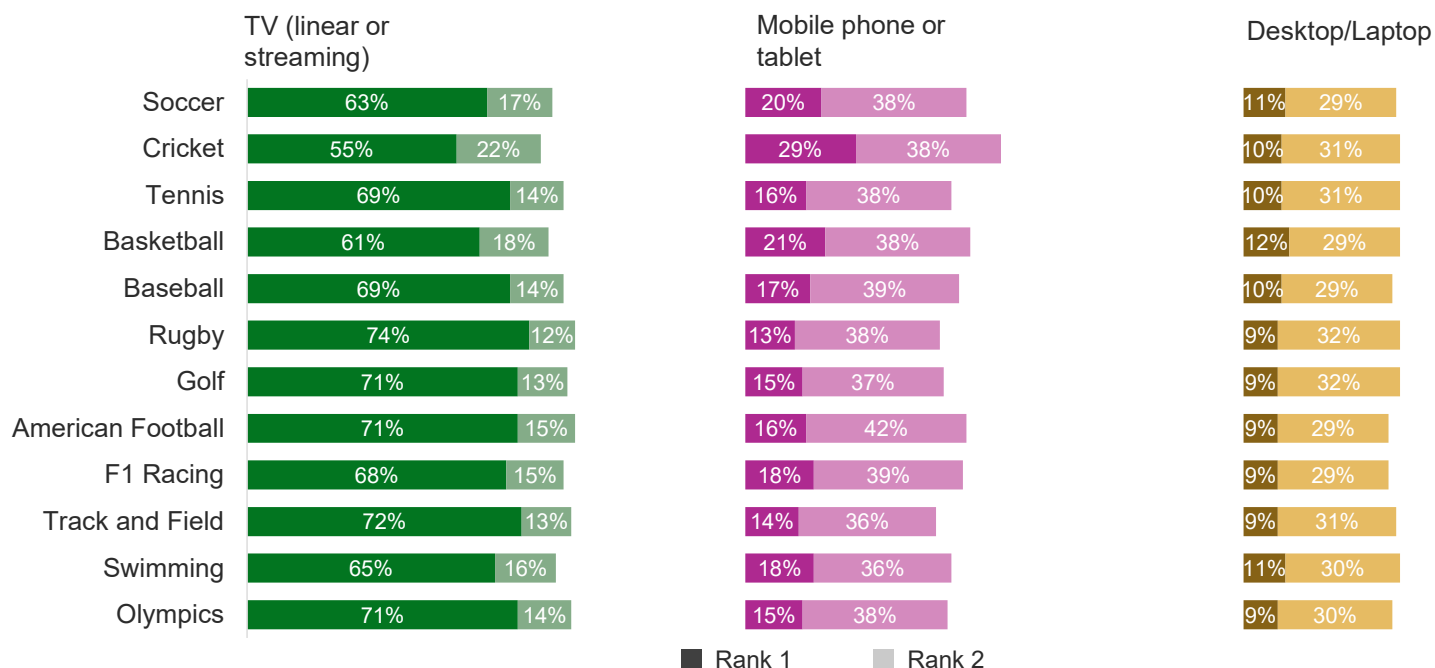
- Swimming fans are unique to other sports fans, saying they **most likely to watch live sporting events at home with company** opposed to alone.
- Golf and rugby fans are slightly less likely to watch the sporting events live in person, and list viewing in a **sports bar or pub as their third most likely location** to watch sporting events (Golf = 32% & Rugby = 36%).

WATCHING & LISTENING HABITS

While TV is the most popular method for watching sports, cricket fans are more likely than other fans to rank mobile devices as the most common way they watch sports

IBM5 What device do you most typically use to watch sporting events? Please rank the top 5 options, with 1 being the most likely to use and 5 being the fifth most likely to use.

Ranking of top 2 devices used to watch sports
By sport, among those who watch

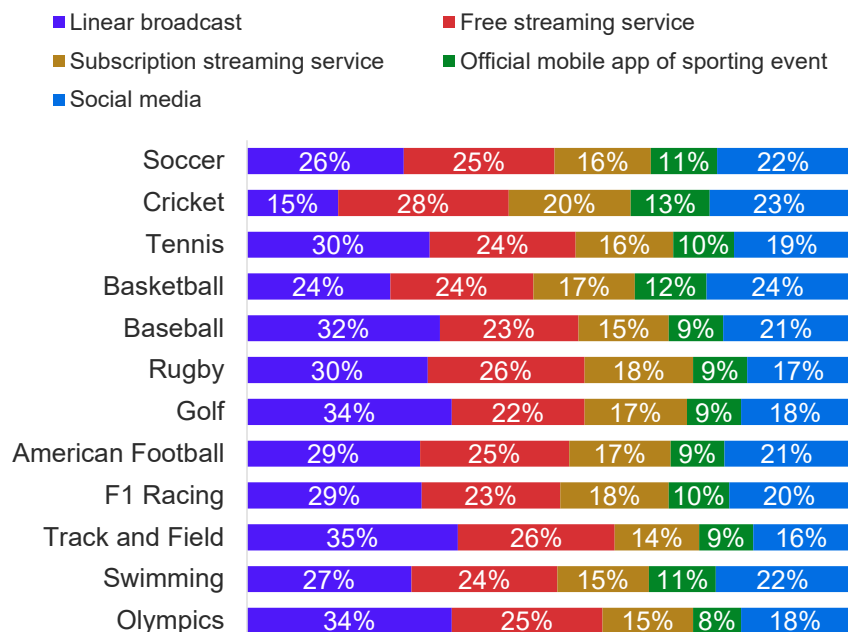


WATCHING & LISTENING HABITS

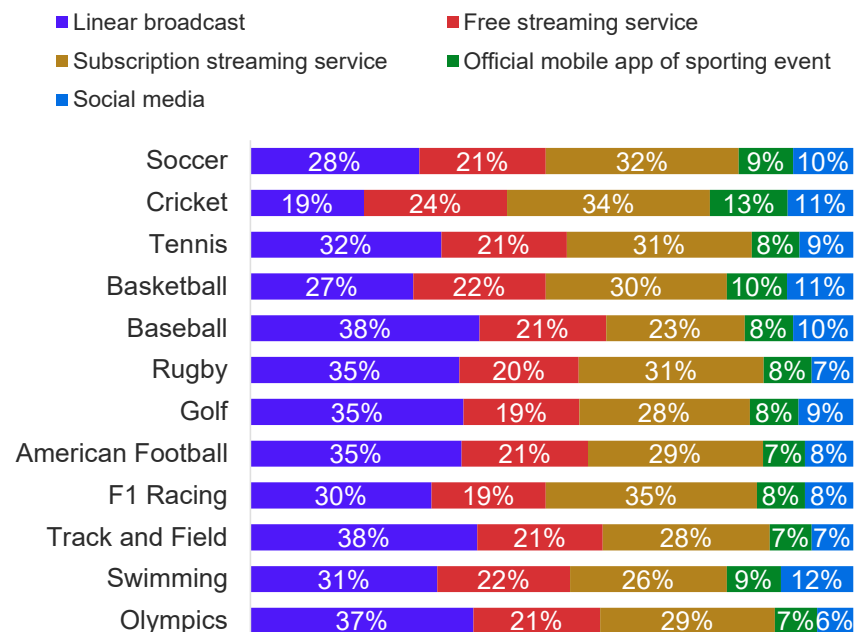
Cricket fans are more likely than fans of other sports to use streaming services, free or paid, as their primary method of watching sports in either format

IBM6 What platform are you most likely to use to watch a sporting event in the following formats?

Most used platforms to watch summaries or highlights
By sport, among those who watch



Most used platforms to watch live sporting events
By sport, among those who watch

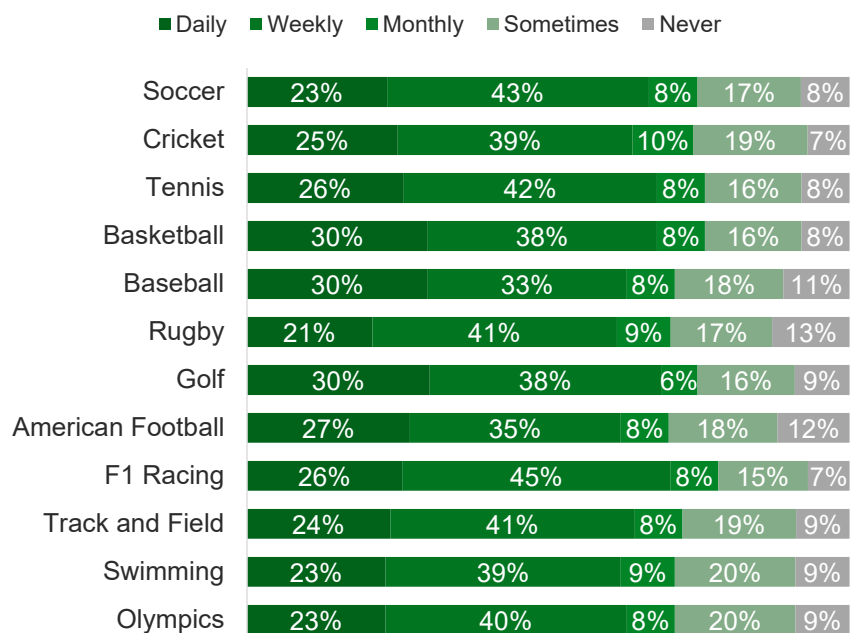


WATCHING & LISTENING HABITS

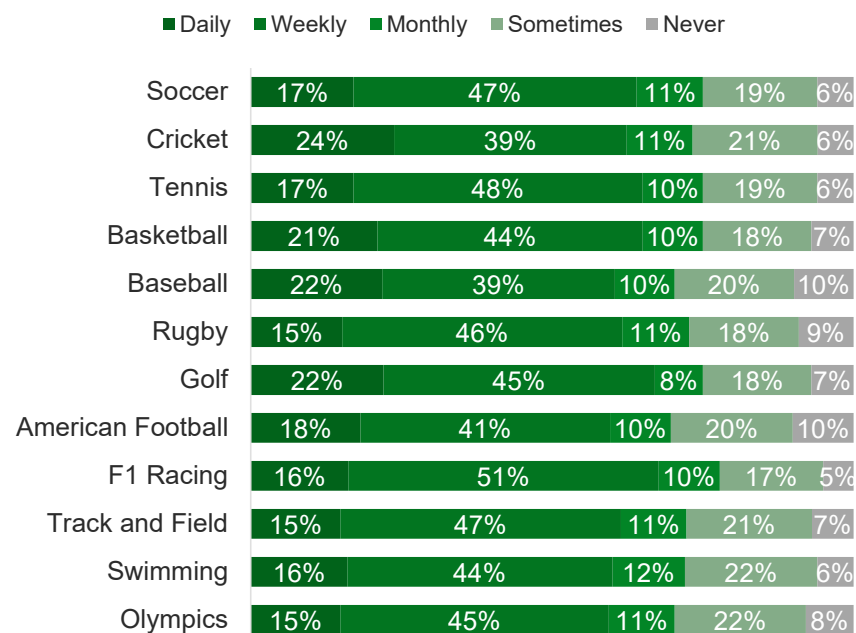
Basketball, baseball, and golf fans demonstrate higher daily engagement with sporting event summaries

IBM7 How often do you listen to sporting events in the following formats?

Frequency of listening summaries or highlights
By sport



Frequency of listening to live sporting events
By sport

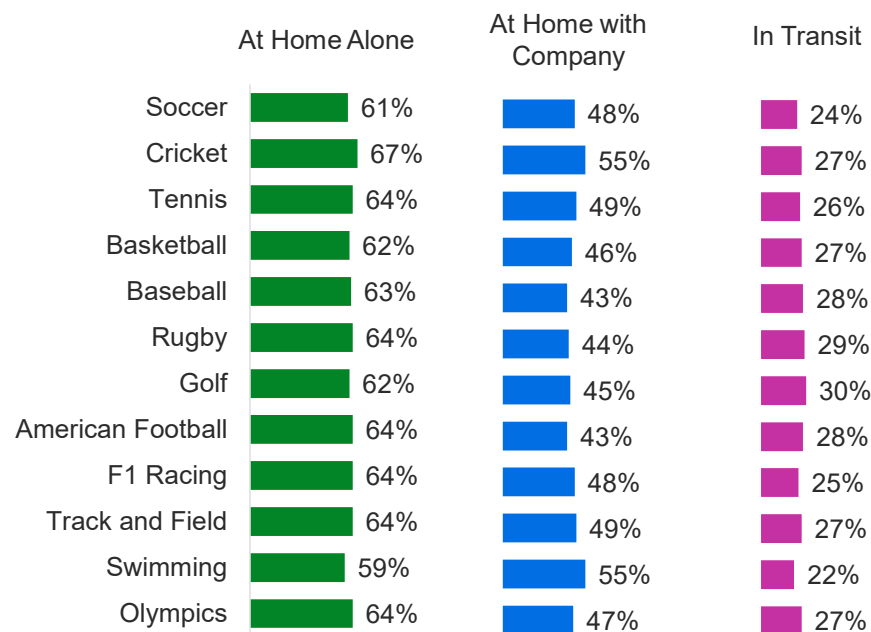


WATCHING & LISTENING HABITS

Across all sports, listening to live sporting events at home alone continues to be reported as the most popular option

IBM8 Where are you most likely to listen to live sporting events? Please select up to three of your top choices.

Top 3 places to listen to live sporting events
By sport, among those who listen

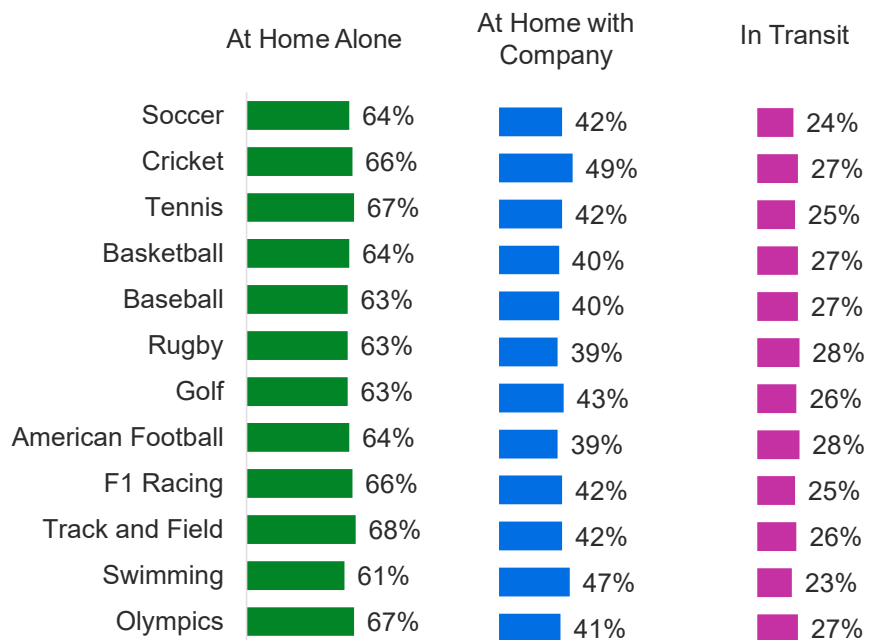


WATCHING & LISTENING HABITS

Like watching, fans across sports are most likely to listen to highlights at home alone, and swimming and cricket fans are more likely than other fans to watch with others

IBM9 Where are you most likely to listen to sporting event summaries or highlights? Please select up to three of your top choices.

Top 3 places to listen to sporting events highlights
By sport, among those who listen

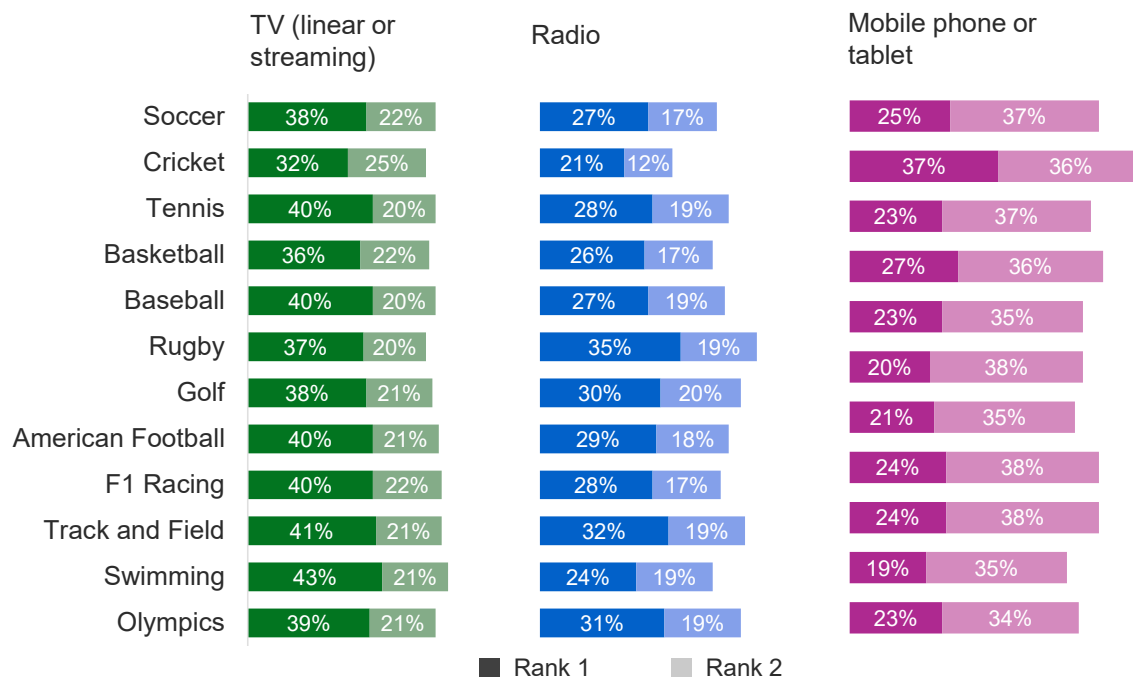


WATCHING & LISTENING HABITS

Listening to sporting events through mobile devices is most popular among cricket fans, with 37% ranking it as their top method for listening to events

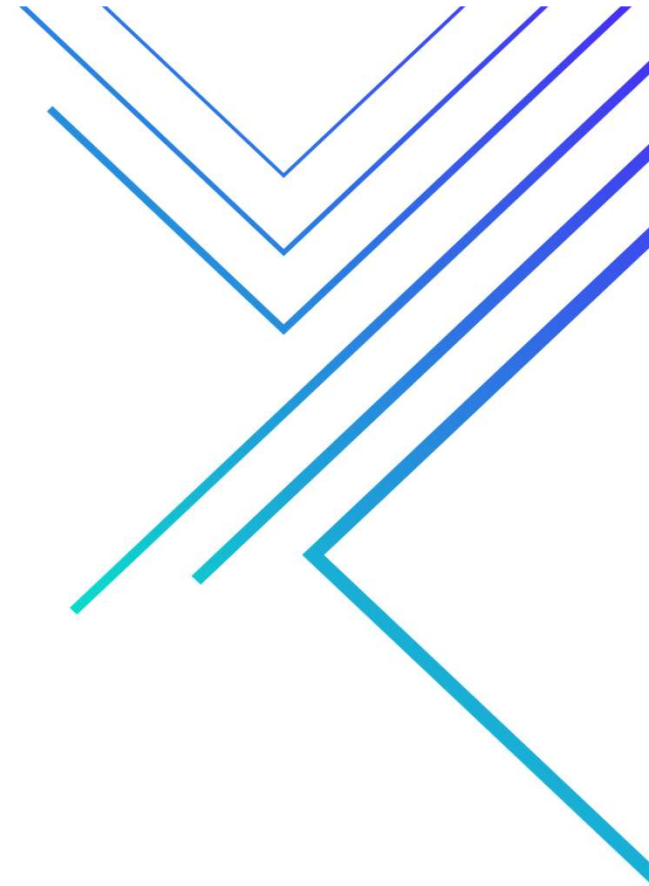
IBM10 What device do you most typically use to listen to sporting events? Please rank the top 5 options, with 1 being the most likely to use and 5 being the fifth most likely to use.

Ranking of top 2 devices used to listen to sports
By sport, among those who listen



SPORTS OVERVIEW: SPORTING EVENT CONSUMPTION

Preferences & Behaviors



PREFERENCES & BEHAVIORS

Sporting events across sports are most likely to be watched live among their fans; Olympics fans are especially likely to watch the events live

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

Methods used to watch favorite sporting events
By sport

	Live	Watching highlight clips on social media	Watching highlight clips on an official website	On-demand clips of packaged highlights	Full on-demand replay	On-demand, manually skipping to parts I am interested in	Other
Soccer	70%	31%	24%	18%	17%	14%	2%
Cricket	72%	41%	36%	22%	20%	18%	2%
Tennis	66%	25%	21%	15%	15%	12%	2%
Basketball	56%	33%	25%	18%	17%	15%	3%
Baseball	64%	29%	24%	15%	13%	12%	3%
Rugby	68%	21%	20%	16%	18%	14%	3%
Golf	62%	24%	23%	15%	15%	14%	3%
American football	70%	30%	24%	16%	16%	14%	3%
F1 racing	67%	26%	19%	16%	18%	13%	2%
Track and field	68%	21%	19%	14%	15%	13%	3%
Swimming	53%	25%	20%	14%	17%	16%	4%
Olympics	75%	24%	20%	15%	16%	15%	2%

PREFERENCES & BEHAVIORS

While video quality and platform findability are top of mind when sports fans select a platform to watch sports, around a third of cricket fans consider added value features ‘very important’

IBM12 How important are the following criteria when selecting a platform to watch a sporting event?

Most important factors for selecting a sports viewing platform, Very important
By sport

	Video quality	Platform findability	Exclusive game/player content	Fan engagement
Soccer	63%	55%	28%	23%
Cricket	73%	63%	37%	32%
Tennis	63%	55%	27%	22%
Basketball	65%	58%	32%	28%
Baseball	65%	56%	26%	24%
Rugby	62%	53%	23%	19%
Golf	67%	59%	29%	26%
American Football	68%	58%	27%	23%
F1 Racing	65%	56%	28%	21%
Track and Field	60%	51%	21%	17%
Swimming	59%	52%	28%	24%
Olympics	64%	55%	22%	17%

Full Statements:

The video quality of the event itself

Ability to find and access the platform easily

Additional content and data around the players and/or game that other platforms do not offer

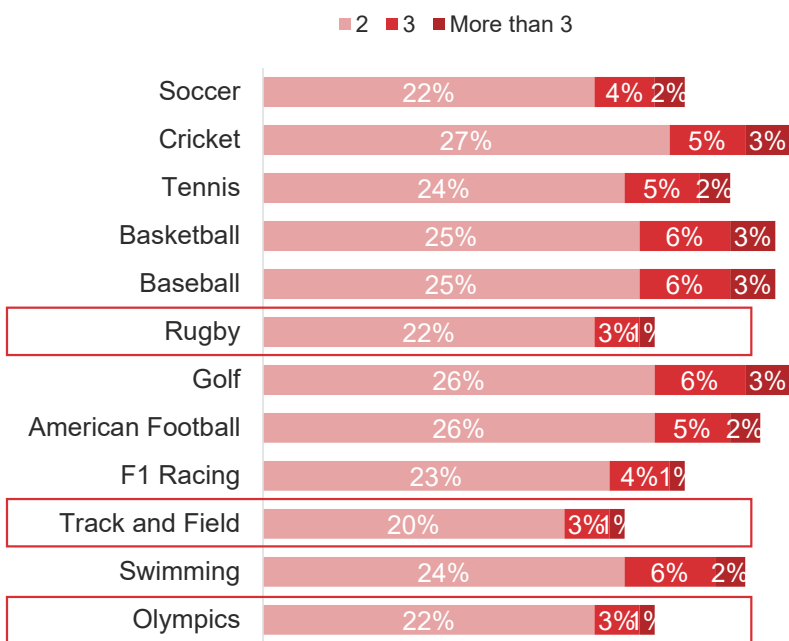
Ability to engage with other fans and viewers on the platform (i.e., live chat, comments, share content)

PREFERENCES & BEHAVIORS

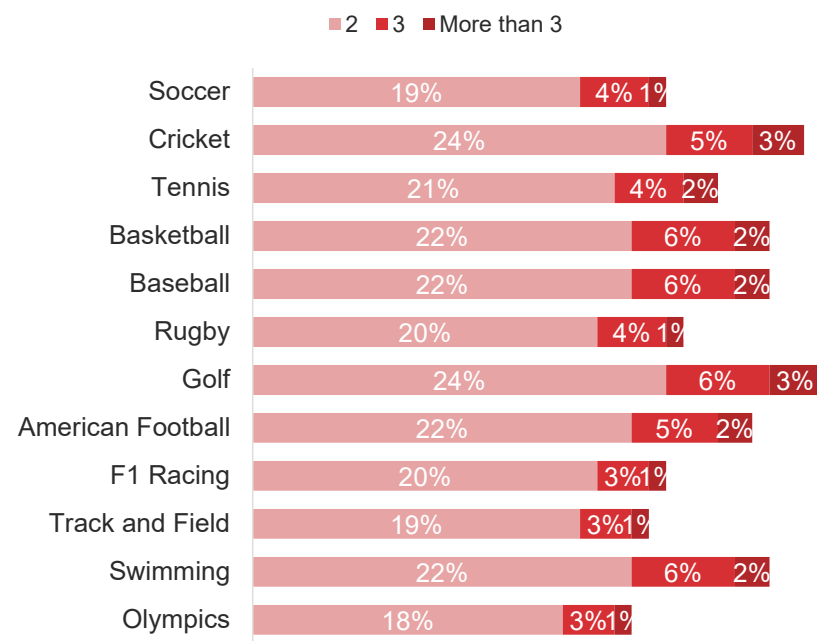
Fans of rugby, track and field, and the Olympics are the least likely to be using multiple devices to watch sporting events

IBM13 When watching and/or listening to a sporting event, do you typically use multiple devices at once? IBM14 How many devices are you typically using while watching and/or listening to a sporting event?

Multi-device use while watching sporting events
By sport



Multi-device use while listening to sporting events
By sport



PREFERENCES & BEHAVIORS

50% of cricket fans using 2 or more devices to watch sporting events, use multiple devices to get more game information, like player or team statistics

IBM15 Why do you use multiple devices while watching and/or listening to a sporting event? Please select all that apply..

Reasons for multi-device use while watching sporting events
By sport, among those who use 2 or more devices to watch

	Multi-tasking	Getting more game info	Interacting with fans	Watching multiple games
Soccer	43%	44%	32%	31%
Cricket	46%	50%	41%	28%
Tennis	44%	45%	30%	32%
Basketball	46%	43%	32%	34%
Baseball	51%	40%	27%	37%
Rugby	49%	48%	30%	33%
Golf	43%	43%	30%	38%
American Football	52%	42%	28%	37%
F1 Racing	45%	45%	32%	33%
Track and Field	48%	47%	27%	32%
Swimming	42%	42%	34%	30%
Olympics	50%	45%	27%	31%

Full Statements: I am multi-tasking, I like to get more information on player and/or team statistics while watching a game. I like to interact with other fans while watching a game. I like to watch multiple sports games at once.

Reasons for multi-device use while listening to sporting events
By sport, among those who use 2 or more devices to listen

	Multi-tasking	Getting more game info	Interacting with fans	Watching multiple games
Soccer	47%	40%	30%	27%
Cricket	49%	43%	36%	27%
Tennis	48%	40%	30%	28%
Basketball	49%	40%	32%	31%
Baseball	52%	37%	29%	34%
Rugby	52%	39%	28%	33%
Golf	49%	37%	29%	35%
American Football	55%	38%	29%	33%
F1 Racing	48%	42%	33%	28%
Track and Field	52%	40%	26%	30%
Swimming	45%	38%	33%	30%
Olympics	54%	39%	27%	28%

Full Statements: I am multi-tasking, I like to get more information on player and/or team statistics while watching a game. I like to interact with other fans while watching a game. I like to watch multiple sports games at once.

PREFERENCES & BEHAVIORS

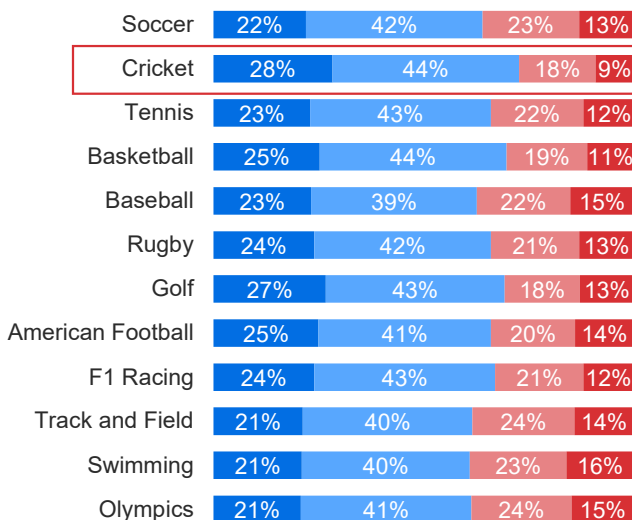
Cricket fans are more willing than other sports fans to disrupting sleep and meetings if it means they can catch a game in a different time zone

IBM16 If a game is occurring in a different time zone, to what extent do you agree with the following statements?

Willing to wake up at an inopportune time to watch a sports game I am interested in

By sport

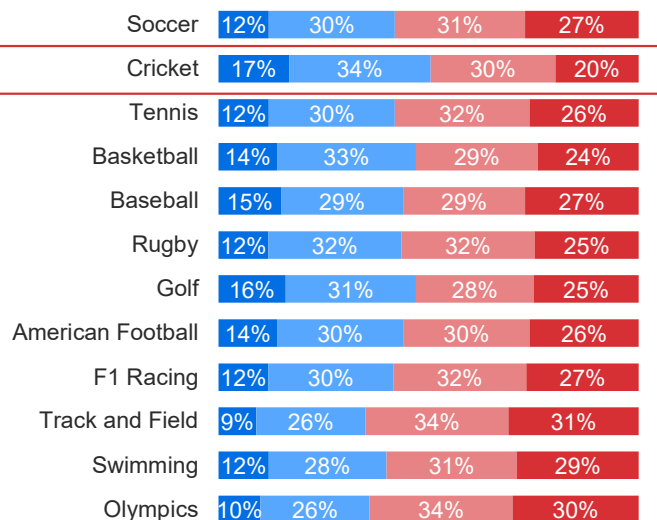
■ Strongly agree ■ Somewhat agree
■ Somewhat disagree ■ Strongly disagree



Willing to move meetings and/or miss classes to catch a sports game I am interested in

By sport

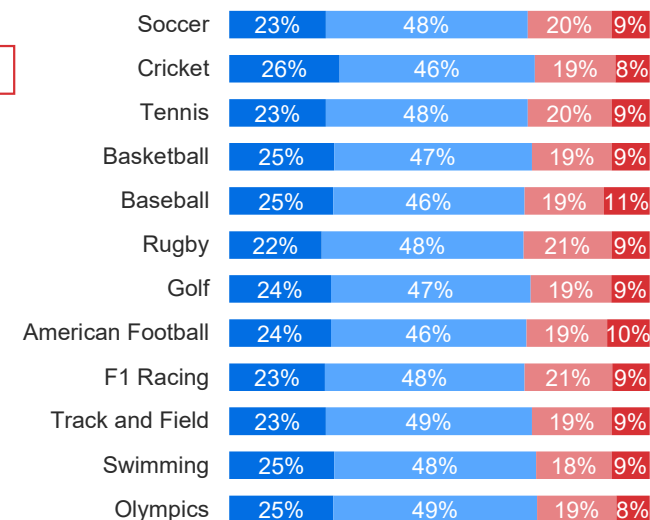
■ Strongly agree ■ Somewhat agree
■ Somewhat disagree ■ Strongly disagree



Willing to miss a live sports game and watch a replay after if the time is not convenient for me

By sport

■ Strongly agree ■ Somewhat agree
■ Somewhat disagree ■ Strongly disagree





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SPORTS CONTENT ENGAGEMENT

Video highlights and news coverage are the most consumed additional sports content; Cricket sees the highest levels of additional content engagement among fans

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

Engagement in additional sports content
By sport

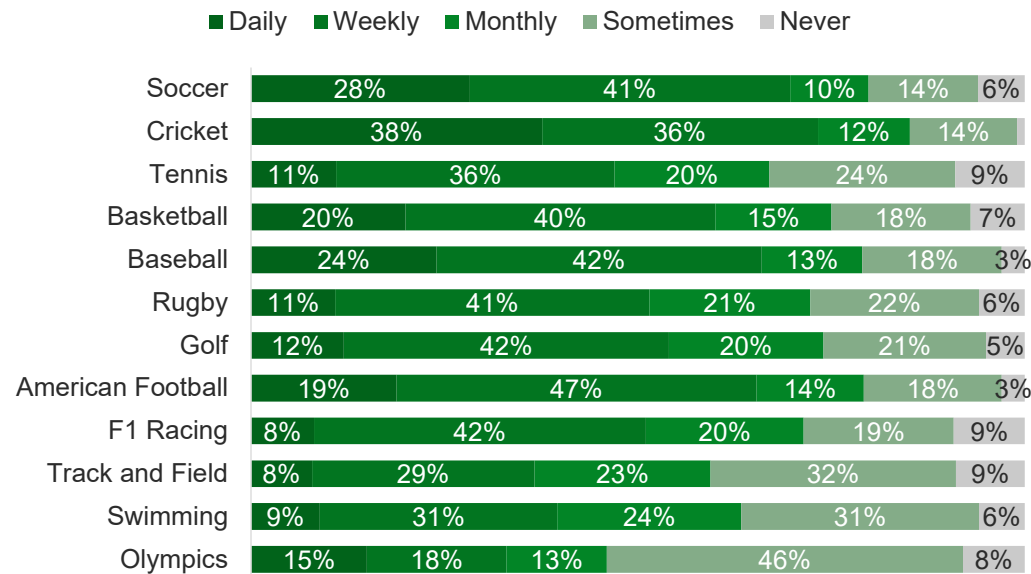
	Video Highlights	News coverage (broadcast / televised reports)	News Articles	Social media accounts/posts	Mobile sports apps	Team/league websites	Podcasts	Fan forums or discussion boards	Blogs/fan websites	Other	None of the above
Soccer	46%	37%	35%	34%	29%	28%	14%	14%	13%	2%	7%
Cricket	55%	40%	42%	50%	40%	27%	20%	17%	20%	3%	4%
Tennis	41%	36%	34%	25%	19%	15%	10%	9%	9%	2%	10%
Basketball	44%	34%	28%	32%	25%	22%	14%	12%	12%	2%	7%
Baseball	44%	39%	31%	31%	23%	24%	13%	10%	11%	2%	9%
Rugby	38%	36%	36%	24%	19%	20%	12%	9%	9%	2%	12%
Golf	39%	38%	31%	22%	19%	15%	13%	9%	10%	1%	9%
American football	49%	41%	32%	34%	27%	26%	16%	13%	12%	1%	8%
F1 racing	45%	37%	34%	28%	21%	17%	11%	11%	11%	2%	9%
Track and field	39%	40%	35%	19%	15%	12%	8%	7%	7%	2%	12%
Swimming	35%	33%	29%	24%	17%	15%	11%	9%	10%	2%	12%
Olympics	46%	46%	38%	26%	17%	14%	10%	8%	8%	2%	10%

SPORTS CONTENT ENGAGEMENT

38% of cricket followers engaging with additional cricket content do so every day

IBM18 How often do you engage with additional content for each of the following sports?

Frequency of additional sports content engagement
By sport, among those engaging with additional content within a specific sport

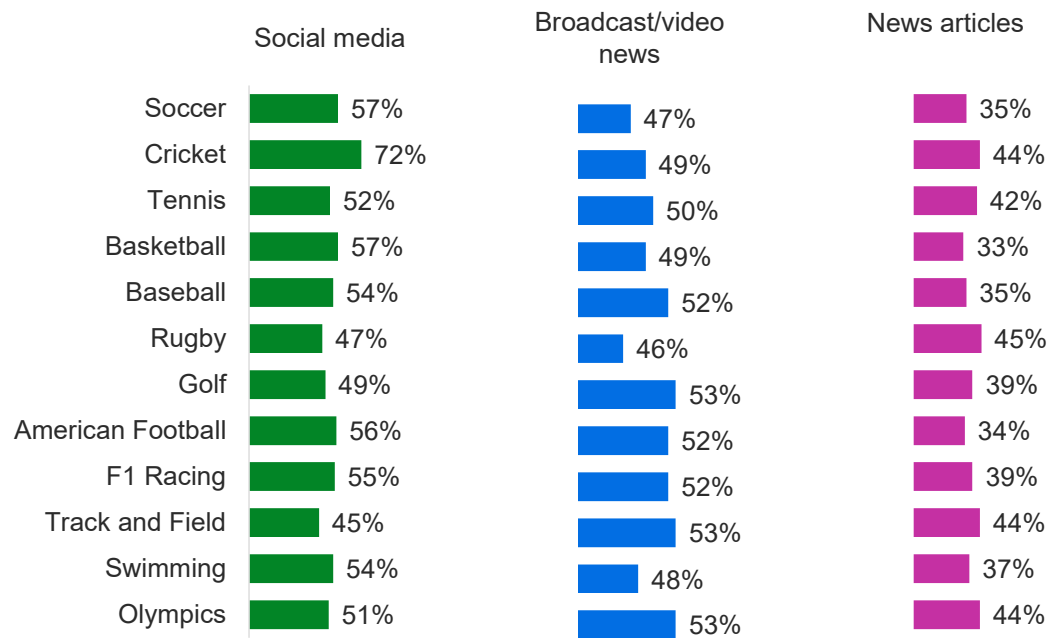


SPORTS CONTENT ENGAGEMENT

Cricket followers are especially likely to be consuming additional sports content through social media

IBM19 How do you most often consume additional news and content around your favorite sports/teams/players? Please select up to three.

Top 3 sources for additional sports content
By sport, among those engaging with additional content

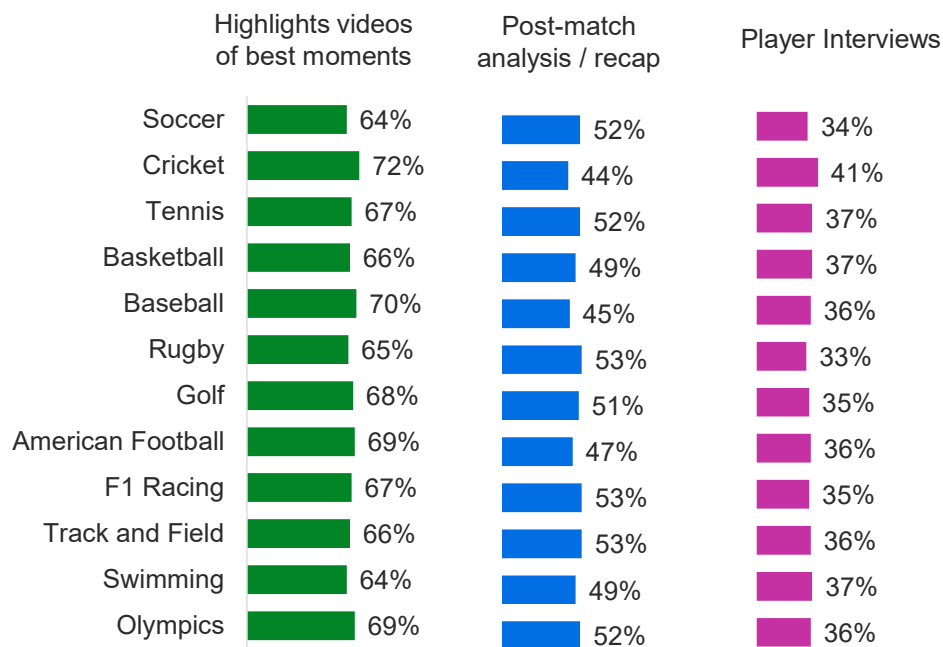


SPORTS CONTENT ENGAGEMENT

Fans across sports are most often consuming highlight videos, followed by post-match recaps and player interviews

IBM20 What kind of information are you consuming most? Select up to three.

Top 3 consumed types of additional sports information
By sport, among those engaging with additional content

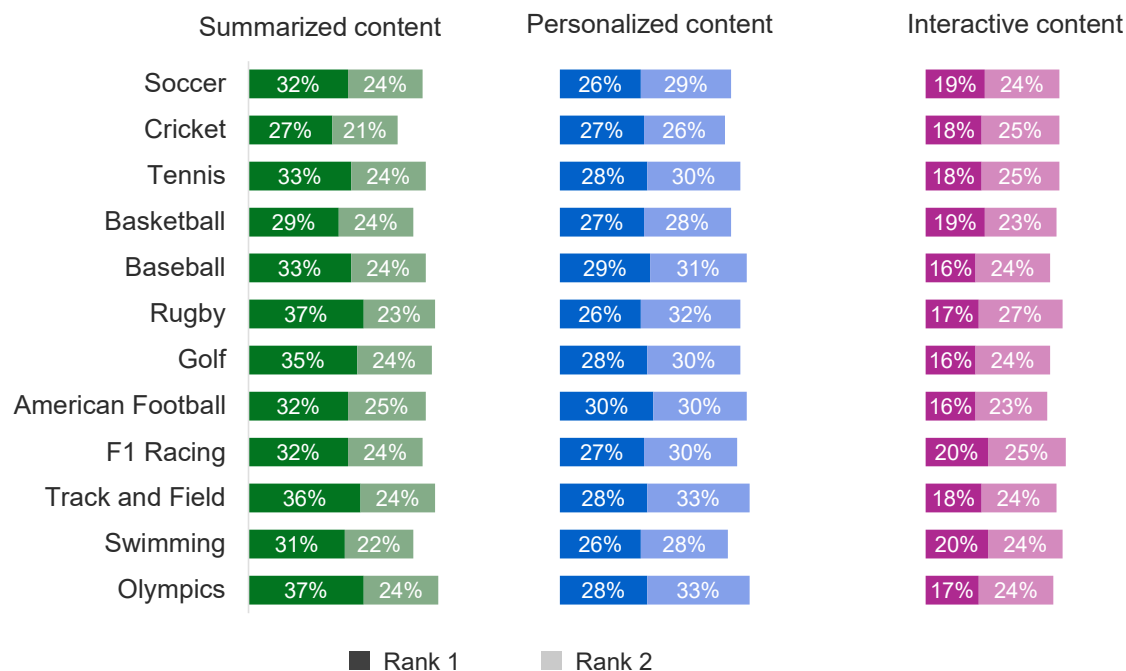


SPORTS CONTENT ENGAGEMENT

Followers across most sports are most likely to rank summarized content as their top priority and personalized content as their second priority when consuming content

IBM21 When consuming sports content, which would be most important to you? Please rank in order of importance, with 1 being the most important and 5 being the fifth most important.

Ranking of top 2 most important sports content criteria
By country, among those engaging with additional content



■ Rank 1 ■ Rank 2



Sport overview

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Sports Content Engagement

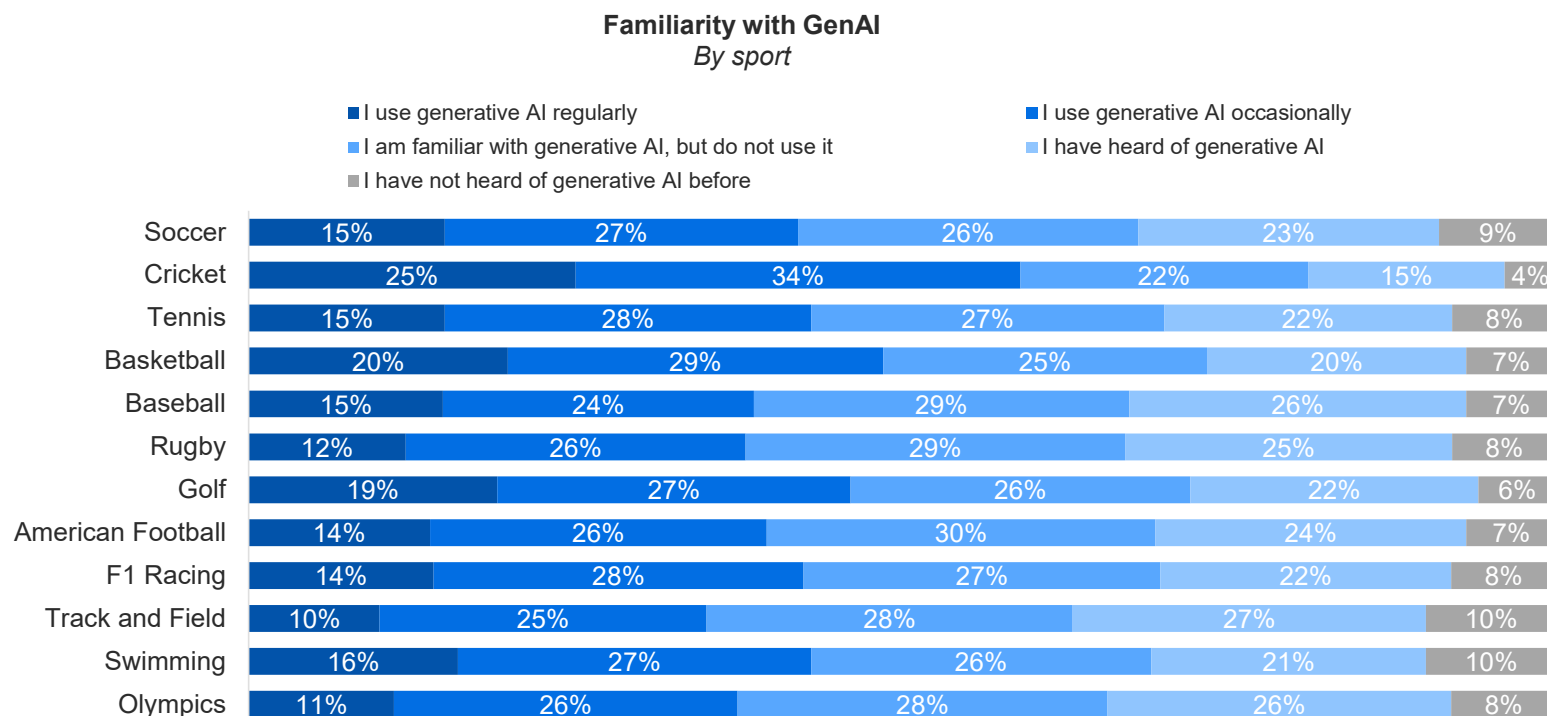
3

Technology's Role in Sports

TECHNOLOGY'S ROLE IN SPORTS

Cricket fans are most likely to be using generative AI, with a quarter saying they use GenAI regularly

IBM22 Which of these best describes your knowledge of generative AI (e.g., ChatGPT)?



TECHNOLOGY'S ROLE IN SPORTS

Fans across sports are less likely to prioritize fan engagement opportunities when thinking about the ways AI could improve their interaction with sports

IBM23 If generative AI could improve the way you engage with your favorite sports in the future, how would you prioritize the following areas?

Top priorities for GenAI improvements, High priority
By sport, among those who have at least heard of AI

	Real-Time Updates	Personalized Content	Unique Insights	Meaningful predictions	Voice Interfaces	Engagement Opportunities
Soccer	37%	31%	31%	28%	27%	23%
Cricket	47%	41%	41%	40%	36%	32%
Tennis	36%	31%	30%	26%	26%	21%
Basketball	40%	36%	35%	32%	31%	27%
Baseball	34%	29%	26%	24%	23%	19%
Rugby	31%	24%	24%	21%	20%	16%
Golf	36%	31%	30%	27%	25%	22%
American Football	34%	29%	27%	25%	23%	19%
F1 Racing	36%	30%	30%	27%	26%	20%
Track and Field	33%	25%	24%	20%	21%	16%
Swimming	36%	30%	30%	26%	26%	22%
Olympics	33%	27%	25%	22%	22%	16%

Full Statements: Keep you updated in real-time on how a player or team is/are doing in their match

Provide content that is personalized around your preferred players, teams and the tournament so it's more relevant for you

Provide more unique insights into a player's and/or team's performance

Provide meaningful predictions about how a player or team will perform in their next match

Interactive voice interfaces (being able to directly ask an AI assistant to provide insights/recaps on the match/event)

Provide opportunities to engage with more fans and/or build new fan communities around the athletes and/or sports teams I follow.

TECHNOLOGY'S ROLE IN SPORTS

Golf and rugby fans feel the most optimistic about the impact of both data analytics and hawk-eye technology on sports

IBM24 What impact do you think the following technologies will have on sports?

Positive impact of technologies on sports, Very + Somewhat positive
By sport

	Data analytics (performance tracking, predictive analytics)	Hawk-Eye technology (for ball tracking)	Wearable technology (fitness trackers, smart clothing, etc.)	Video assistant referee (VAR)	Virtual reality (VR) (immersive experiences, training simulations)	Artificial intelligence (AI)	Augmented Reality (AR) (interactive fan experiences, enhanced broadcasts)
Soccer	66%	63%	62%	63%	56%	54%	55%
Cricket	77%	74%	73%	66%	68%	69%	64%
Tennis	68%	65%	62%	63%	57%	55%	55%
Basketball	70%	65%	66%	62%	60%	58%	58%
Baseball	60%	56%	55%	50%	50%	45%	46%
Rugby	62%	62%	57%	54%	47%	47%	45%
Golf	67%	67%	62%	57%	56%	53%	53%
American Football	61%	57%	57%	51%	49%	47%	47%
F1 Racing	67%	64%	62%	63%	57%	55%	55%
Track and Field	63%	58%	57%	58%	49%	48%	48%
Swimming	65%	60%	61%	63%	58%	55%	55%
Olympics	64%	60%	58%	57%	51%	49%	48%

TECHNOLOGY'S ROLE IN SPORTS

Sports fans largely believe that tech will have a positive impact on sports advancements; however, they feel more neutrally regarding its impact on fan engagement

IBM25 What impact do you think technology will have on the advancement of sports in the following areas?

Perceived Positive impact of different technologies on the advancement of sports, Very + Somewhat positive

By sport

	Training	Game Strategy	Sports Medicine/ Rehabilitation	Coaching	Injury Prevention	Talent Identification & Acquisitions	Fan Engagement
Soccer	73%	73%	72%	69%	67%	66%	60%
Cricket	83%	80%	77%	79%	73%	75%	71%
Tennis	75%	74%	76%	71%	70%	66%	60%
Basketball	75%	75%	75%	72%	71%	69%	65%
Baseball	70%	66%	70%	66%	64%	62%	60%
Rugby	71%	70%	74%	70%	68%	59%	53%
Golf	75%	72%	76%	73%	69%	67%	62%
American Football	70%	68%	70%	67%	65%	62%	60%
F1 Racing	74%	74%	74%	69%	68%	65%	61%
Track and Field	70%	70%	73%	65%	66%	60%	53%
Swimming	74%	74%	74%	70%	69%	65%	59%
Olympics	72%	70%	73%	67%	67%	62%	58%

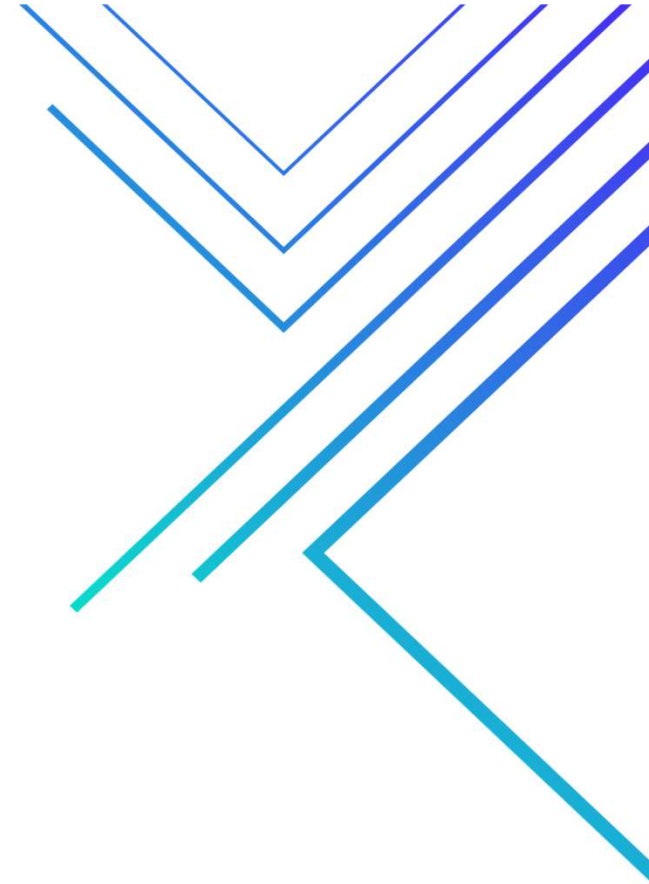
SECTION 5

Appendix



APPENDIX

Sports consumption

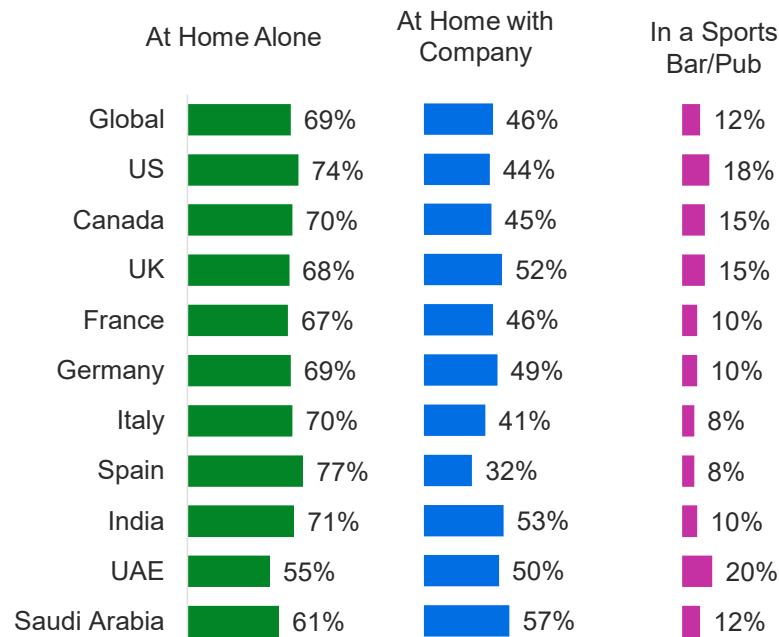


WATCHING & LISTENING HABITS

Sporting event summaries are most likely to be viewed at home, with a larger emphasis on watching solo rather than in the company of others

IBM4 Where are you most likely to watch sporting event summaries or highlights? Please select up to three of your top choices.

Top 3 Most likely places to watch sporting summaries
By country, among those who watch



Most likely place to watch sporting summaries, top 1
By age/country, among those who watch

	18-29	30-44	45-54	55+
Global	Home	Home	Home	Home
US	Home	Home	Home	Home
Canada	Home	Home	Home	Home
UK	Home	Home	Home	Home
France	Home	Home	Home	Home
Germany	Home	Home	Home	Home
Italy	Home	Home	Home	Home
Spain	Home	Home	Home	Home
India	Home	Home	Home	Home
UAE	Home	Home	Home+	Home
Saudi Arabia	Home	Home	Home+	Home

Home
= At home alone

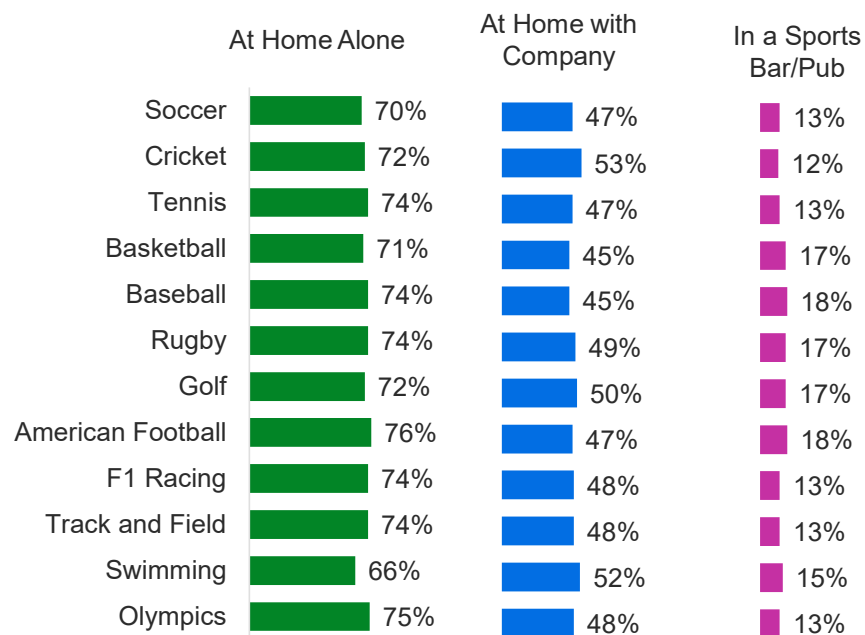
Home+
= At home with company

WATCHING & LISTENING HABITS

Sports summaries and highlights are most likely to be viewed at home alone; Cricket and swimming fans are more likely than fans of other sports to watch at home with others

IBM4 Where are you most likely to watch sporting event summaries or highlights? Please select up to three of your top choices.

Most likely places to watch sporting event summaries, top 3
By sport, among those who watch



Other Highlights

- While fans across various sports agree that their top two most likely places to view sports summaries and highlights are at home alone or at home with company, **cricket fans stand out as not including sports bar/pub as their third most likely option**, ranking the venue 5th behind in transit (17%) and at work (15%).

WATCHING & LISTENING HABITS

Frequent sports-listening habits are similar across age groups globally

IBM7 How often do you listen to sporting events in the following formats?

Frequent sporting event summary listeners, Weekly+
By age/country

	18-29	30-44	45-54	55+
Global	55%	63%	61%	56%
US	52%	54%	54%	48%
Canada	55%	61%	61%	55%
UK	49%	55%	50%	48%
France	42%	44%	45%	40%
Germany	53%	59%	63%	60%
Italy	48%	61%	65%	65%
Spain	58%	69%	74%	78%
India	61%	69%	59%	65%
UAE	70%	77%	74%	49%
Saudi Arabia	67%	75%	78%	75%

Frequent live sporting event listeners, Weekly+
By age/country

	18-29	30-44	45-54	55+
Global	55%	59%	58%	54%
US	51%	52%	51%	49%
Canada	55%	54%	51%	51%
UK	49%	53%	47%	44%
France	46%	50%	50%	51%
Germany	45%	54%	54%	52%
Italy	44%	56%	65%	63%
Spain	58%	64%	70%	70%
India	62%	65%	53%	60%
UAE	64%	74%	70%	49%
Saudi Arabia	70%	76%	77%	74%

WATCHING & LISTENING HABITS

Most listeners across age groups prefer to listen to sports in any format at home alone

IBM9 Where are you most likely to listen to sporting event summaries or highlights? Please select up to three of your top choices.

Top place to listen to live sporting events, Top 1
By age/country, among those who listen

	18-29	30-44	45-54	55+
Global	Home	Home	Home	Home
US	Home	Home	Home	Home
Canada	Home	Home	Home	Home
UK	Home	Home	Home	Home
France	Home	Home	Home+	Home* Home+*
Germany	Home	Home	Home	Home
Italy	Home	Home	Home	Home
Spain	Home	Home	Home	Home
India	Home	Home	Home	Home
UAE	Home+	Home+	Home	Home
Saudi Arabia	Home+	Home+	Home+	Home+

*Tied for top 1

Top place to listen to sporting event highlights
By age/country, among those who listen

	18-29	30-44	45-54	55+
Global	Home	Home	Home	Home
US	Home	Home	Home	Home
Canada	Home	Home	Home	Home
UK	Home	Home	Home	Home
France	Home	Home	Home	Home
Germany	Home	Home	Home	Home
Italy	Home	Home	Home	Home
Spain	Home	Home	Home	Home
India	Home	Home	Home	Home
UAE	Home	Home	Home	Home+
Saudi Arabia	Home	Home	Home+	Home

Home
= At home alone

Home+
= At home with company

PREFERENCES & BEHAVIORS

US

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

US: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	12%	3%	3%	3%	6%	8%	0%
Cricket	1%	0%	0%	1%	1%	1%	0%
Tennis	10%	2%	2%	2%	4%	5%	1%
Basketball	42%	9%	8%	8%	16%	21%	2%
Baseball	41%	7%	6%	6%	12%	16%	2%
Rugby	1%	0%	0%	1%	1%	1%	0%
Golf	15%	2%	2%	2%	4%	5%	0%
American football	64%	11%	10%	10%	18%	23%	2%
F1 racing	6%	2%	2%	2%	3%	3%	0%
Track and field	10%	2%	2%	2%	4%	5%	1%
Swimming	8%	2%	3%	2%	3%	4%	1%
Olympics	32%	6%	6%	5%	9%	11%	1%

PREFERENCES & BEHAVIORS

Canada

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

Canada: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	22%	5%	5%	6%	10%	13%	1%
Cricket	3%	1%	1%	0%	2%	2%	0%
Tennis	16%	4%	3%	4%	7%	7%	1%
Basketball	25%	6%	5%	7%	11%	15%	1%
Baseball	30%	5%	4%	7%	11%	12%	1%
Rugby	2%	1%	1%	1%	1%	1%	0%
Golf	16%	3%	2%	3%	6%	6%	1%
American football	30%	5%	4%	4%	9%	11%	1%
F1 racing	10%	3%	2%	2%	4%	4%	0%
Track and field	7%	1%	1%	1%	3%	3%	1%
Swimming	9%	3%	2%	3%	6%	7%	1%
Olympics	39%	8%	7%	6%	14%	15%	2%

PREFERENCES & BEHAVIORS

UK

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

UK: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	63%	15%	13%	18%	23%	23%	3%
Cricket	19%	3%	4%	6%	7%	6%	1%
Tennis	29%	5%	5%	7%	8%	8%	1%
Basketball	5%	2%	2%	3%	3%	4%	0%
Baseball	1%	1%	0%	1%	1%	1%	0%
Rugby	23%	4%	4%	5%	5%	5%	1%
Golf	13%	2%	3%	4%	4%	4%	1%
American football	6%	2%	2%	3%	3%	3%	0%
F1 racing	22%	6%	5%	6%	6%	7%	1%
Track and field	14%	3%	3%	3%	3%	3%	0%
Swimming	9%	4%	4%	3%	4%	4%	1%
Olympics	35%	7%	8%	8%	7%	8%	0%

PREFERENCES & BEHAVIORS

France

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

France: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	35%	7%	5%	4%	7%	10%	1%
Cricket	0%	0%	0%	0%	0%	0%	0%
Tennis	21%	5%	4%	2%	4%	4%	1%
Basketball	8%	3%	2%	2%	2%	4%	1%
Baseball	1%	0%	0%	0%	0%	0%	0%
Rugby	10%	2%	1%	1%	1%	1%	0%
Golf	3%	1%	1%	0%	1%	1%	0%
American football	1%	0%	0%	0%	0%	0%	0%
F1 racing	7%	1%	1%	1%	1%	1%	0%
Track and field	14%	4%	3%	1%	2%	4%	1%
Swimming	27%	8%	7%	3%	4%	5%	4%
Olympics	10%	2%	2%	1%	2%	2%	0%

PREFERENCES & BEHAVIORS

Germany

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

Germany: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	59%	17%	12%	21%	16%	20%	3%
Cricket	0%	0%	0%	0%	0%	0%	0%
Tennis	17%	5%	4%	6%	5%	5%	1%
Basketball	12%	5%	4%	6%	6%	6%	1%
Baseball	2%	1%	1%	1%	1%	1%	0%
Rugby	2%	1%	1%	1%	1%	1%	0%
Golf	3%	2%	1%	1%	1%	1%	0%
American football	11%	4%	2%	5%	4%	4%	0%
F1 racing	23%	8%	4%	7%	5%	6%	1%
Track and field	21%	5%	5%	7%	5%	5%	1%
Swimming	11%	5%	4%	6%	4%	5%	1%
Olympics	37%	9%	7%	11%	8%	8%	2%

PREFERENCES & BEHAVIORS

Italy

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

Italy: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	58%	7%	7%	5%	16%	20%	2%
Cricket	0%	0%	0%	0%	0%	0%	0%
Tennis	33%	5%	4%	3%	8%	10%	1%
Basketball	12%	2%	2%	1%	5%	6%	0%
Baseball	1%	0%	0%	0%	1%	1%	0%
Rugby	6%	1%	1%	0%	1%	1%	0%
Golf	1%	0%	1%	0%	1%	1%	0%
American football	1%	1%	0%	0%	1%	1%	0%
F1 racing	34%	5%	4%	2%	7%	8%	1%
Track and field	24%	3%	3%	2%	6%	7%	0%
Swimming	21%	3%	3%	2%	6%	7%	1%
Olympics	42%	4%	5%	3%	9%	11%	1%

PREFERENCES & BEHAVIORS

Spain

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

Spain: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	65%	16%	9%	16%	11%	16%	2%
Cricket	0%	0%	0%	0%	0%	0%	0%
Tennis	35%	9%	6%	8%	6%	8%	1%
Basketball	28%	8%	6%	9%	7%	9%	1%
Baseball	2%	1%	1%	1%	1%	1%	0%
Rugby	2%	1%	1%	1%	1%	1%	0%
Golf	3%	1%	1%	1%	1%	1%	0%
American football	2%	2%	1%	1%	1%	2%	0%
F1 racing	34%	9%	5%	7%	5%	8%	1%
Track and field	13%	4%	3%	4%	3%	3%	0%
Swimming	9%	4%	3%	4%	2%	4%	1%
Olympics	32%	9%	8%	9%	4%	7%	1%

PREFERENCES & BEHAVIORS

India

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

India: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	40%	11%	10%	12%	23%	28%	1%
Cricket	68%	21%	17%	22%	35%	41%	2%
Tennis	19%	7%	6%	7%	13%	15%	0%
Basketball	9%	4%	4%	5%	8%	10%	1%
Baseball	2%	1%	1%	2%	3%	3%	0%
Rugby	1%	1%	1%	1%	2%	2%	0%
Golf	3%	1%	1%	1%	2%	2%	0%
American football	6%	2%	3%	3%	4%	5%	0%
F1 racing	13%	4%	5%	5%	8%	11%	0%
Track and field	4%	1%	1%	1%	2%	2%	0%
Swimming	6%	3%	3%	3%	6%	7%	0%
Olympics	21%	6%	6%	7%	13%	14%	0%

PREFERENCES & BEHAVIORS

UAE

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

UAE: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	43%	17%	15%	21%	25%	35%	1%
Cricket	13%	4%	3%	4%	8%	12%	0%
Tennis	10%	4%	3%	4%	7%	11%	0%
Basketball	21%	12%	12%	13%	17%	21%	1%
Baseball	2%	1%	1%	1%	1%	2%	0%
Rugby	1%	0%	0%	0%	1%	0%	0%
Golf	2%	2%	2%	2%	3%	3%	0%
American football	7%	3%	3%	4%	5%	7%	0%
F1 racing	11%	3%	3%	4%	6%	10%	0%
Track and field	2%	1%	1%	2%	2%	2%	0%
Swimming	8%	4%	4%	5%	6%	9%	1%
Olympics	10%	3%	3%	4%	6%	8%	1%

PREFERENCES & BEHAVIORS

Saudi Arabia

IBM11 For the following sports, how do you typically watch your favorite sporting events? Please select all that apply.

Saudi Arabia: Methods used to watch favorite sporting events
By sport

	Live	Full on-demand replay	On-demand, manually skipping to parts I am interested in	On-demand clips of packaged highlights	Watching highlight clips on an official website	Watching highlight clips on social media	Other
Soccer	61%	14%	14%	24%	32%	49%	1%
Cricket	3%	1%	1%	1%	2%	2%	0%
Tennis	7%	2%	2%	4%	3%	6%	0%
Basketball	13%	5%	6%	8%	10%	14%	0%
Baseball	2%	0%	1%	1%	1%	1%	0%
Rugby	0%	0%	0%	0%	0%	1%	0%
Golf	3%	1%	1%	1%	2%	2%	0%
American football	3%	2%	1%	2%	3%	4%	0%
F1 racing	13%	3%	5%	7%	9%	13%	0%
Track and field	2%	1%	1%	1%	1%	2%	0%
Swimming	9%	3%	4%	5%	7%	9%	1%
Olympics	8%	1%	2%	3%	5%	6%	0%

PREFERENCES & BEHAVIORS

IBM12 How important are the following criteria when selecting a platform to watch a sporting event?

Most important factors for selecting a sports viewing platform, Very important
By age/country

Age	Video quality				Platform findability				Exclusive game/player content				Fan engagement			
	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+
Global	63%	64%	60%	56%	57%	56%	52%	46%	31%	30%	24%	17%	27%	26%	18%	12%
US	60%	63%	65%	65%	51%	56%	56%	53%	33%	35%	26%	15%	32%	33%	24%	11%
Canada	63%	65%	65%	66%	61%	57%	55%	53%	30%	28%	15%	10%	31%	26%	13%	6%
UK	61%	67%	67%	61%	53%	55%	55%	49%	22%	23%	18%	10%	20%	20%	15%	7%
France	50%	50%	49%	38%	47%	42%	39%	32%	23%	19%	18%	12%	21%	15%	10%	7%
Germany	53%	51%	49%	38%	47%	43%	45%	38%	20%	20%	20%	13%	20%	17%	16%	8%
Italy	46%	53%	48%	49%	40%	42%	46%	37%	13%	17%	19%	13%	13%	13%	12%	9%
Spain	64%	65%	64%	62%	56%	57%	57%	51%	32%	25%	28%	22%	19%	16%	16%	11%
India	73%	78%	82%	74%	65%	69%	67%	60%	42%	46%	40%	31%	34%	41%	37%	29%
UAE	71%	77%	78%	57%	70%	71%	70%	55%	37%	42%	58%	56%	29%	36%	54%	54%
Saudi Arabia	73%	75%	70%	65%	68%	65%	54%	64%	39%	44%	40%	60%	36%	35%	24%	54%

Full Statements:

The video quality of the event itself

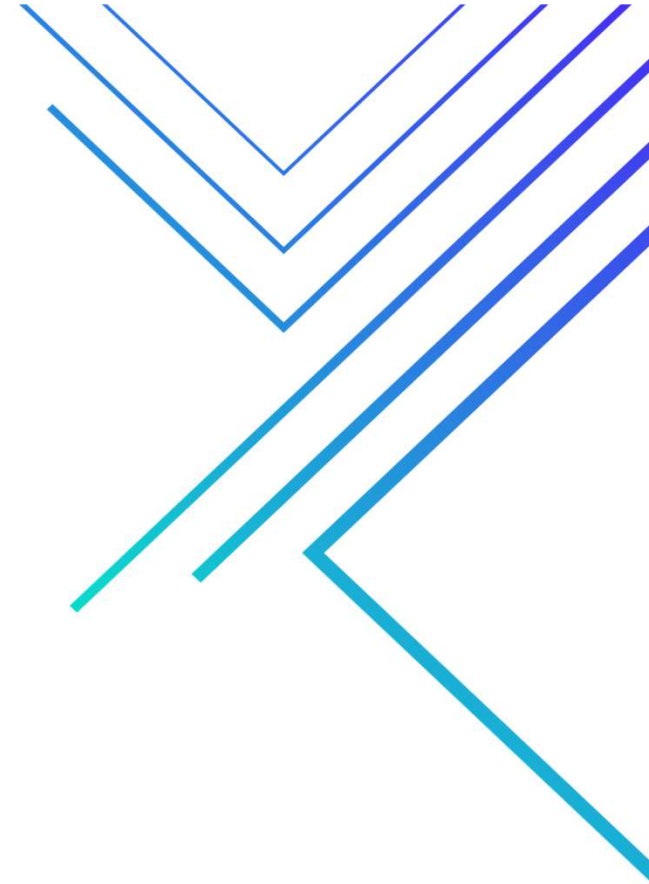
Ability to find and access the platform easily

Additional content and data around the players and/or game that other platforms do not offer

Ability to engage with other fans and viewers on the platform (i.e., live chat, comments, share content)

APPENDIX

Sports Content Engagement



SPORTS CONTENT ENGAGEMENT

US

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

US: Engagement in additional content around favorite sports, teams, players, etc.

By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	5%	7%	8%	4%	9%	3%	5%	3%	5%	0%	1%
Cricket	1%	1%	1%	1%	1%	0%	0%	0%	1%	0%	0%
Tennis	4%	7%	5%	2%	8%	2%	3%	2%	3%	0%	1%
Basketball	16%	25%	22%	8%	28%	7%	14%	7%	16%	1%	5%
Baseball	18%	24%	19%	7%	25%	5%	14%	4%	13%	1%	6%
Rugby	1%	1%	1%	0%	1%	0%	1%	1%	1%	0%	0%
Golf	5%	8%	5%	2%	9%	1%	3%	2%	3%	0%	3%
American football	26%	37%	30%	12%	40%	10%	22%	8%	22%	2%	7%
F1 racing	3%	3%	4%	2%	4%	1%	2%	1%	3%	0%	1%
Track and field	4%	7%	4%	2%	8%	2%	2%	2%	4%	0%	1%
Swimming	4%	6%	4%	2%	6%	1%	2%	2%	3%	0%	1%
Olympics	14%	21%	13%	4%	20%	3%	6%	2%	6%	0%	4%

SPORTS CONTENT ENGAGEMENT

Canada

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

Canada: Engagement in additional content around favorite sports, teams, players, etc.

By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	10%	12%	13%	6%	19%	4%	9%	5%	8%	0%	3%
Cricket	2%	1%	2%	1%	3%	1%	1%	1%	1%	0%	0%
Tennis	8%	10%	7%	3%	12%	3%	4%	3%	5%	0%	2%
Basketball	11%	14%	15%	6%	21%	4%	9%	5%	10%	0%	4%
Baseball	14%	18%	12%	5%	20%	4%	10%	4%	9%	0%	5%
Rugby	1%	1%	1%	0%	2%	0%	1%	0%	1%	0%	0%
Golf	7%	9%	5%	3%	10%	2%	3%	2%	4%	0%	2%
American football	12%	16%	12%	5%	20%	4%	9%	3%	9%	0%	4%
F1 racing	5%	6%	5%	3%	8%	1%	3%	2%	3%	0%	1%
Track and field	3%	5%	3%	1%	5%	1%	1%	1%	1%	0%	1%
Swimming	5%	5%	5%	3%	8%	2%	3%	2%	4%	0%	2%
Olympics	19%	26%	17%	4%	28%	3%	8%	3%	10%	1%	5%

SPORTS CONTENT ENGAGEMENT

UK

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

UK: Engagement in additional content around favorite sports, teams, players, etc.

By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	34%	38%	33%	13%	39%	13%	28%	9%	23%	1%	7%
Cricket	13%	14%	7%	3%	12%	2%	6%	1%	6%	0%	3%
Tennis	15%	17%	9%	4%	15%	2%	4%	2%	6%	1%	6%
Basketball	3%	3%	5%	2%	5%	1%	3%	1%	3%	0%	1%
Baseball	1%	1%	1%	1%	2%	0%	1%	0%	0%	0%	0%
Rugby	12%	12%	7%	4%	12%	2%	6%	2%	5%	0%	4%
Golf	8%	9%	4%	2%	7%	2%	2%	1%	4%	0%	2%
American football	3%	4%	3%	2%	5%	1%	3%	1%	2%	0%	1%
F1 racing	11%	13%	10%	4%	14%	4%	5%	3%	6%	0%	4%
Track and field	7%	8%	4%	1%	8%	1%	2%	1%	2%	0%	2%
Swimming	5%	6%	4%	2%	6%	1%	2%	2%	2%	0%	3%
Olympics	18%	22%	11%	3%	18%	3%	4%	2%	6%	0%	5%

SPORTS CONTENT ENGAGEMENT

France

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

France: Engagement in additional content around favorite sports, teams, players, etc.
By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	13%	17%	13%	5%	11%	6%	12%	4%	13%	1%	4%
Cricket	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Tennis	8%	10%	6%	3%	5%	2%	6%	2%	6%	1%	4%
Basketball	3%	4%	5%	2%	4%	2%	3%	2%	3%	1%	1%
Baseball	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Rugby	4%	5%	2%	1%	2%	1%	3%	1%	2%	0%	1%
Golf	1%	2%	1%	1%	1%	0%	1%	0%	1%	0%	1%
American football	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%
F1 racing	2%	3%	2%	0%	2%	0%	2%	1%	2%	0%	1%
Track and field	5%	7%	5%	2%	3%	1%	4%	1%	4%	0%	3%
Swimming	11%	16%	8%	4%	5%	3%	6%	3%	6%	1%	10%
Olympics	4%	6%	3%	1%	2%	1%	3%	1%	3%	0%	1%

SPORTS CONTENT ENGAGEMENT

Germany

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

Germany: Engagement in additional content around favorite sports, teams, players, etc.
By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	35%	42%	20%	9%	35%	12%	23%	11%	22%	3%	6%
Cricket	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Tennis	11%	13%	5%	2%	10%	3%	4%	3%	5%	1%	2%
Basketball	9%	10%	4%	3%	10%	3%	5%	3%	5%	0%	1%
Baseball	1%	1%	1%	1%	2%	0%	1%	1%	1%	0%	0%
Rugby	1%	1%	1%	0%	2%	1%	1%	1%	1%	0%	0%
Golf	2%	2%	1%	1%	2%	1%	1%	1%	1%	0%	1%
American football	6%	6%	5%	2%	9%	3%	4%	3%	4%	0%	1%
F1 racing	14%	16%	6%	3%	14%	3%	5%	4%	7%	1%	2%
Track and field	13%	17%	4%	2%	10%	2%	3%	3%	3%	1%	4%
Swimming	9%	10%	4%	2%	8%	2%	3%	2%	3%	1%	2%
Olympics	22%	28%	7%	4%	19%	4%	6%	4%	7%	2%	5%

SPORTS CONTENT ENGAGEMENT

Italy

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

Italy: Engagement in additional content around favorite sports, teams, players, etc.

By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	28%	18%	11%	5%	31%	8%	18%	7%	15%	2%	11%
Cricket	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Tennis	16%	9%	6%	3%	19%	3%	6%	3%	6%	1%	7%
Basketball	7%	4%	3%	1%	8%	1%	4%	1%	3%	0%	3%
Baseball	0%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%
Rugby	3%	2%	1%	0%	3%	0%	1%	0%	1%	0%	1%
Golf	1%	1%	0%	0%	1%	0%	0%	0%	0%	0%	0%
American football	1%	0%	0%	0%	1%	0%	1%	0%	1%	0%	1%
F1 racing	15%	12%	5%	2%	17%	4%	5%	3%	6%	1%	6%
Track and field	12%	7%	3%	1%	13%	2%	4%	2%	4%	1%	6%
Swimming	10%	7%	3%	2%	12%	2%	4%	2%	3%	1%	5%
Olympics	18%	14%	6%	3%	21%	3%	5%	3%	5%	1%	8%

SPORTS CONTENT ENGAGEMENT

Spain

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

Spain: Engagement in additional content around favorite sports, teams, players, etc.

By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	35%	31%	22%	12%	42%	10%	23%	7%	23%	3%	6%
Cricket	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Tennis	18%	18%	10%	5%	22%	3%	6%	3%	8%	2%	5%
Basketball	15%	16%	10%	5%	23%	3%	9%	4%	10%	1%	3%
Baseball	2%	2%	1%	1%	2%	1%	1%	1%	1%	0%	0%
Rugby	2%	2%	1%	1%	3%	0%	1%	0%	1%	0%	1%
Golf	2%	2%	1%	1%	3%	0%	1%	0%	1%	0%	0%
American football	2%	2%	1%	1%	3%	0%	1%	1%	1%	0%	1%
F1 racing	18%	18%	12%	5%	24%	4%	6%	3%	9%	1%	4%
Track and field	8%	8%	4%	2%	9%	1%	3%	1%	3%	1%	2%
Swimming	6%	6%	3%	2%	8%	1%	3%	1%	3%	1%	2%
Olympics	17%	19%	9%	5%	22%	3%	5%	3%	7%	1%	4%

SPORTS CONTENT ENGAGEMENT

India

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

India: Engagement in additional content around favorite sports, teams, players, etc.
By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	26%	21%	34%	13%	37%	12%	18%	15%	26%	1%	1%
Cricket	40%	36%	54%	21%	54%	18%	26%	22%	44%	3%	2%
Tennis	14%	13%	17%	6%	19%	6%	8%	7%	11%	1%	0%
Basketball	7%	7%	10%	5%	10%	4%	6%	5%	8%	1%	0%
Baseball	2%	3%	3%	1%	3%	1%	2%	2%	2%	0%	0%
Rugby	1%	1%	2%	1%	2%	1%	1%	1%	2%	0%	0%
Golf	2%	2%	2%	2%	2%	1%	2%	2%	2%	0%	0%
American football	5%	4%	5%	3%	6%	3%	3%	3%	5%	0%	0%
F1 racing	9%	9%	12%	4%	13%	5%	6%	6%	9%	1%	1%
Track and field	3%	3%	3%	1%	4%	1%	1%	1%	2%	0%	0%
Swimming	5%	5%	8%	3%	8%	3%	4%	4%	6%	0%	0%
Olympics	16%	16%	17%	7%	19%	6%	7%	7%	12%	1%	1%

SPORTS CONTENT ENGAGEMENT

UAE

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

UAE: Engagement in additional content around favorite sports, teams, players, etc.
By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	19%	27%	33%	13%	38%	15%	25%	14%	28%	2%	2%
Cricket	6%	7%	12%	4%	11%	4%	6%	5%	8%	1%	0%
Tennis	5%	7%	9%	4%	11%	3%	4%	4%	6%	0%	0%
Basketball	12%	14%	20%	11%	20%	11%	13%	10%	13%	1%	1%
Baseball	1%	1%	1%	1%	1%	1%	1%	1%	1%	0%	0%
Rugby	1%	1%	1%	0%	1%	0%	0%	0%	0%	0%	0%
Golf	2%	2%	3%	1%	3%	2%	2%	2%	2%	0%	0%
American football	4%	5%	6%	3%	7%	3%	4%	4%	5%	0%	0%
F1 racing	5%	8%	10%	4%	11%	4%	5%	3%	5%	0%	1%
Track and field	2%	2%	2%	1%	2%	1%	1%	1%	1%	0%	0%
Swimming	5%	7%	8%	2%	10%	4%	4%	4%	5%	0%	1%
Olympics	5%	8%	9%	3%	9%	3%	4%	3%	5%	0%	0%

SPORTS CONTENT ENGAGEMENT

Saudi Arabia

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite sports, teams, players, etc.? Please select all that apply.

Saudi Arabia: Engagement in additional content around favorite sports, teams, players, etc.
By sport

	News Articles	News coverage (broadcast / televised reports)	Social media accounts/posts	Podcasts	Video Highlights	Fan forums or discussion boards	Team/league websites	Blogs/fan websites	Mobile sports apps	Other	None of the above
Soccer	21%	30%	46%	14%	48%	16%	27%	14%	39%	1%	3%
Cricket	1%	1%	2%	1%	3%	1%	1%	1%	2%	0%	0%
Tennis	2%	4%	5%	1%	7%	2%	2%	2%	3%	0%	1%
Basketball	6%	9%	11%	5%	13%	5%	7%	6%	11%	1%	0%
Baseball	1%	1%	1%	1%	1%	1%	1%	1%	1%	0%	0%
Rugby	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Golf	1%	2%	2%	1%	2%	1%	1%	1%	2%	0%	0%
American football	2%	2%	3%	2%	4%	2%	1%	1%	3%	0%	0%
F1 racing	5%	8%	12%	3%	13%	4%	7%	4%	8%	0%	0%
Track and field	1%	2%	2%	1%	3%	1%	1%	1%	1%	0%	0%
Swimming	4%	7%	9%	3%	10%	3%	4%	3%	7%	1%	1%
Olympics	3%	5%	6%	2%	9%	2%	3%	2%	4%	0%	0%

SPORTS CONTENT ENGAGEMENT

IBM18 How often do you engage with additional content for each of the following sports?

Frequent additional sports content engagement among key sports, Daily
By age/country

	Soccer				Cricket				Tennis				Basketball				Golf				F1 racing				Olympics			
	Age	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54	55+	18-29	30-44	45-54
Global	19%	20%	16%	12%	11%	8%	3%	2%	3%	3%	3%	3%	7%	7%	6%	4%	2%	1%	1%	1%	3%	2%	2%	1%	2%	4%	5%	9%
US	8%	6%	2%	1%	1%	1%	0%	0%	3%	3%	2%	1%	22%	19%	19%	9%	2%	3%	3%	2%	2%	2%	0%	0%	4%	4%	7%	13%
Canada	13%	9%	6%	3%	2%	1%	0%	1%	11%	3%	3%	3%	20%	13%	11%	4%	10%	6%	2%	2%	4%	1%	2%	2%	6%	6%	13%	15%
UK	27%	31%	27%	27%	2%	3%	4%	5%	3%	3%	5%	4%	5%	2%	1%	0%	2%	1%	1%	2%	4%	3%	3%	2%	1%	3%	6%	8%
France	18%	16%	11%	7%	0%	0%	0%	0%	3%	2%	4%	2%	6%	2%	2%	0%	1%	0%	0%	0%	2%	1%	0%	0%	2%	1%	2%	3%
Germany	22%	24%	23%	18%	0%	1%	0%	0%	2%	3%	2%	1%	4%	4%	2%	2%	0%	1%	0%	0%	3%	2%	2%	1%	1%	3%	8%	13%
Italy	18%	18%	17%	16%	0%	0%	0%	0%	4%	3%	5%	5%	5%	2%	1%	1%	0%	0%	0%	0%	5%	4%	2%	3%	1%	3%	4%	9%
Spain	16%	15%	10%	6%	0%	0%	0%	0%	1%	2%	2%	2%	3%	3%	2%	1%	0%	0%	0%	0%	3%	2%	2%	0%	1%	2%	1%	2%
India	15%	14%	15%	16%	38%	45%	34%	37%	2%	6%	7%	6%	3%	3%	4%	1%	0%	1%	1%	0%	2%	3%	4%	1%	2%	4%	6%	8%
UAE	34%	34%	30%	13%	10%	10%	4%	1%	3%	4%	1%	0%	5%	13%	24%	9%	0%	1%	1%	1%	2%	3%	1%	1%	1%	3%	1%	1%
Saudi Arabia	38%	39%	33%	51%	2%	1%	1%	0%	0%	2%	4%	0%	1%	5%	4%	42%	0%	1%	1%	0%	3%	5%	1%	0%	1%	1%	2%	1%



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