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2025 Sports Survey

For IBM

AUGUST 2025



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Methodology

This survey was conducted June 23-30, 2025, among a total sample of 20,864 sports fans (ages 18+) in the US, Canada, the UK, France, Germany, Italy, Spain, India, the UAE, Saudi Arabia, Mexico and Brazil.

- To qualify as a sports fan, 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.

The interviews for each market were conducted online, and the data is unweighted. Global results have a margin of error of +/- 1%.

A prior version of this survey was fielded in May 2024 among the same sample, with the exception of Mexico and Brazil. Longitudinal insights are presented only for questions and markets that are consistent across waves.

Audience

Sports Fans

	May 2024 Survey		June 2025 Survey	
	Sample Size	Margin of Error (MOE)	Sample Size	Margin of Error (MOE)
Global	18082	+/- 1%	20864	+/- 1%
US	2138	+/- 2%	2051	+/- 2%
CANADA	2007	+/- 2%	2039	+/- 2%
UK	2001	+/- 2%	2046	+/- 2%
FRANCE	1972	+/- 2%	2043	+/- 2%
GERMANY	2010	+/- 2%	2046	+/- 2%
ITALY	2008	+/- 2%	2036	+/- 2%
SPAIN	1861	+/- 2%	2043	+/- 2%
INDIA	2033	+/- 2%	2209	+/- 2%
UAE	1045	+/- 3%	1028	+/- 3%
SAUDI ARABIA	1007	+/- 3%	1048	+/- 3%
MEXICO	*N/A*		1227	+/- 3%
BRAZIL	*N/A*		1048	+/- 3%

KEY FINDINGS

Fans are expanding their sports experience beyond live games, turning to highlights, apps, and influencers for deeper engagement.

- Fans are consuming more than just live games—90% are engaging with additional sports content, with highlight videos being the most popular form of extra content.
- Sports app usage is widespread, especially among in-person attendees, and apps are valued for real-time updates and exclusive content.
- While sports fans turn to highlights when engaging with sports content more generally, they seek deeper engagement—such as game analysis and predictions—from the influencers they follow.
- Community engagement is becoming increasingly important in sports, with more fans prioritizing community-focused content in 2025 compared to 2024.

Technology is transforming the fan journey, with AI, personalization, and immersive features now central to how fans connect with sports.

- AI is rapidly becoming a core part of the sports fan experience. Over half of sports fans are using AI, and the majority trust AI –generated sports content.
- Fans are eager for personalized, real-time, and immersive digital experiences, and see technology as a positive force in sports.
- Fans are also placing greater importance on AI advancements that help them engage with the broader sports community.

While traditional sports engagement remains important, fans are ready for change, with many using multiple devices to watch sports.

- TV is still the main device used for watching sports, and while linear broadcasting leads for live events, digital platforms like streaming services are nearly as popular.
- Sports viewing experiences will continue to evolve—73% expect their sports consumption habits to change by 2027.
- More than a quarter of sports fans use multiple devices while watching, often for sports-related activities, like getting updates on other games.
- Multi-device usage has increased year-over-year in several markets such as the US, Germany, India, the UAE, and Saudi Arabia.

SECTION 1

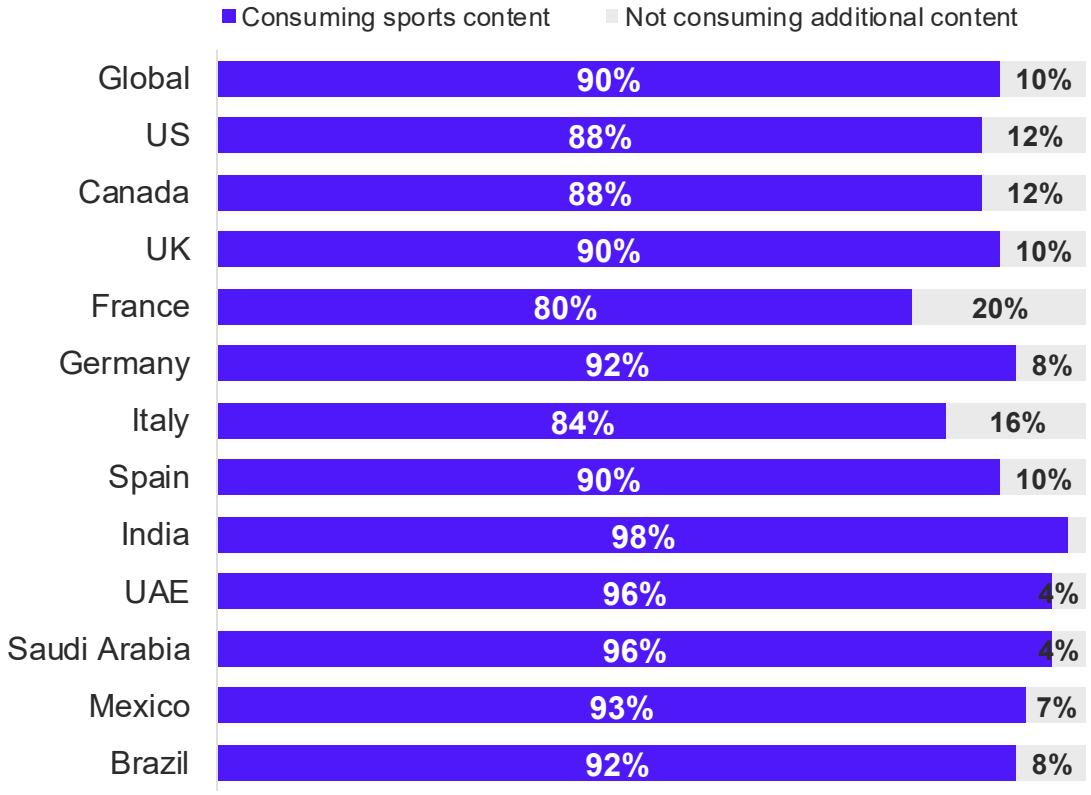
Sports Content Engagement

SPORTS CONTENT ENGAGEMENT

90% of fans consume sports content beyond watching events, with fans in India and the Middle East leading in engagement

Engagement With Additional Sports Content

Among all sports fans



Engagement With Additional Sports Content

Total engaging with additional sports content, Among all sports fans

Age Groups	18-29	30-44	45-54	55+
Global	**95%**	**93%**	**91%**	**82%**
US	95%	91%	91%	82%
Canada	94%	91%	90%	82%
UK	95%	92%	91%	86%
France	90%	86%	81%	73%
Germany	95%	95%	90%	88%
Italy	91%	89%	87%	77%
Spain	95%	93%	91%	84%
India	97%	98%	98%	94%
UAE	95%	97%	95%	100%
Saudi Arabia	95%	97%	93%	99%
Mexico	93%	95%	94%	87%
Brazil	93%	93%	90%	88%

Additional content engagement is strong across all age groups, with the highest levels seen among the youngest sports fans.

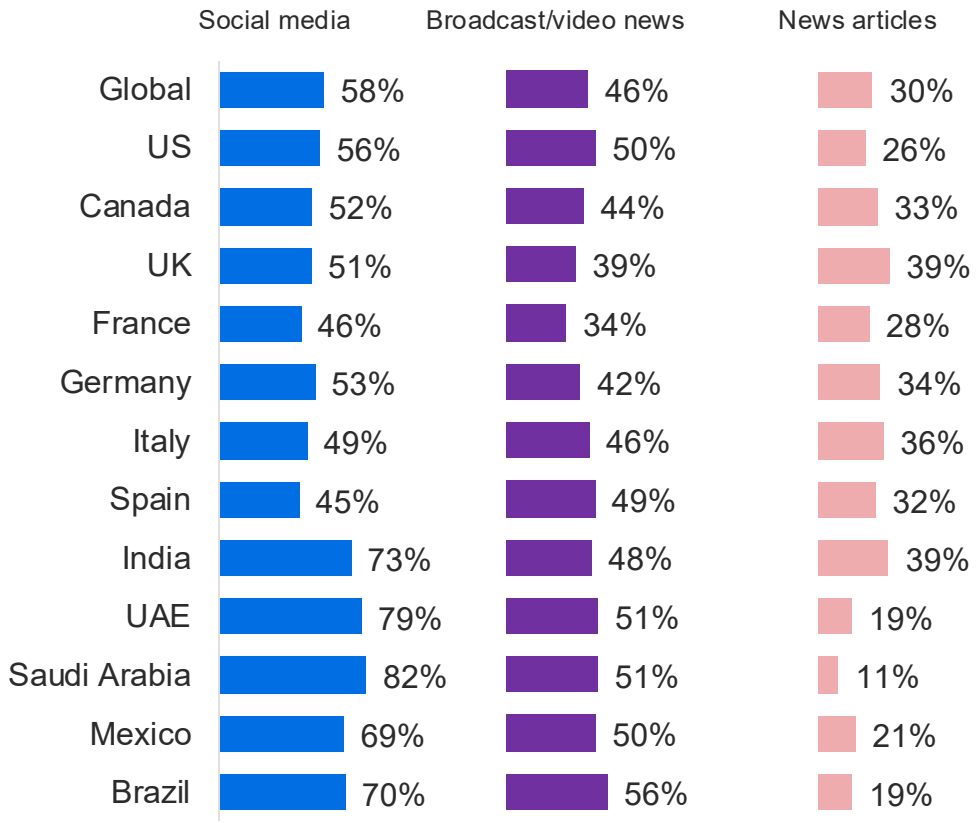
IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite spots, teams, players, etc.? Please select all that apply.
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

SPORTS CONTENT ENGAGEMENT

Social media, broadcast news, and news articles are the top channels for additional sports content

Top 3 Channels Used to Consume Additional Content

% selected (select up to 3), Among those engaging with additional content



Top Channel Used to Consumer Additional Content

Top response, Among those engaging with additional content

Social media has gained prominence as an additional source for sport content across age groups.

Age Groups	18-29	30-44	45-54	55+
Global	**Social – 74%**	**Social – 68%**	**Social – 56%**	**Broadcast – 52%**
US	Social	Social	Social	Broadcast
Canada	Social	Social	Social	Broadcast
UK	Social	Social	Social	Articles
France	Social	Social	Social	Radio
Germany	Social	Social	Social	Broadcast
Italy	Social	Social	Social	Broadcast
Spain	Social	Social	Broadcast	Broadcast
India	Social	Social	Social	Social
UAE	Social	Social	Social	Social
Saudi Arabia	Social	Social	Social	Social
Mexico	Social	Social	Social	Broadcast
Brazil	Social	Social	Social	Broadcast

Social = Social Media

Broadcast = Broadcast/video news

Articles = News articles (print/digital)

Radio = Radio

IBM19 How do you most often consume additional news and content around your favorite sports/teams/players? Please select up to three.
Sample sizes: Global = 18763n, US = 1806n, Canada = 1800n, UK = 1843n, France = 1638n, Germany = 1883n, Italy = 1704n, Spain = 1829n, India = 2160n, UAE = 989n, Saudi Arabia = 1008n, Mexico = 1143n, Brazil = 960n

SPORTS CONTENT ENGAGEMENT

Significant decreases across multiple channels suggest that sports fans are spreading out their content consumption more than before

2024 vs. 2025: Most Used Channels for Consuming Additional Content

% selected (Select up to 3), Among those who consume additional sports content

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
Social media	53%	56%	56%	52%	54%	51%	50%	46%	51%	53%	33%	49%	49%	45%	80%	73%	66%	79%	79%	82%
Broadcast/video news	52%	50%	47%	44%	38%	39%	39%	34%	46%	42%	48%	46%	47%	49%	49%	48%	45%	51%	49%	51%
News articles (print/digital)	31%	26%	35%	33%	42%	39%	32%	28%	39%	34%	40%	36%	35%	32%	43%	39%	22%	19%	15%	11%
Official league/team/player websites or apps	24%	23%	26%	24%	24%	25%	25%	22%	28%	29%	31%	26%	27%	25%	31%	32%	38%	42%	43%	37%
Radio	24%	19%	25%	19%	29%	24%	36%	30%	36%	31%	31%	26%	33%	32%	8%	8%	17%	10%	7%	4%
Podcast	15%	17%	15%	15%	15%	17%	9%	10%	9%	12%	7%	8%	11%	13%	14%	20%	18%	15%	12%	12%
Feature documentaries / reality docuseries	10%	11%	13%	11%	13%	15%	14%	15%	13%	12%	10%	11%	6%	7%	9%	14%	16%	16%	11%	12%
Blogs	6%	6%	7%	7%	6%	7%	4%	5%	7%	7%	5%	5%	4%	5%	13%	15%	19%	11%	9%	6%
None of the above	3%	3%	3%	4%	3%	3%	3%	5%	2%	2%	3%	3%	2%	2%	0%	1%	0%	1%	1%	1%
Sample Sizes	*1958*	*1806*	*1823*	*1800*	*1847*	*1843*	*1662*	*1638*	*1851*	*1883*	*1728*	*1704*	*1734*	*1829*	*1992*	*2160*	*1031*	*989*	*980*	*1008*

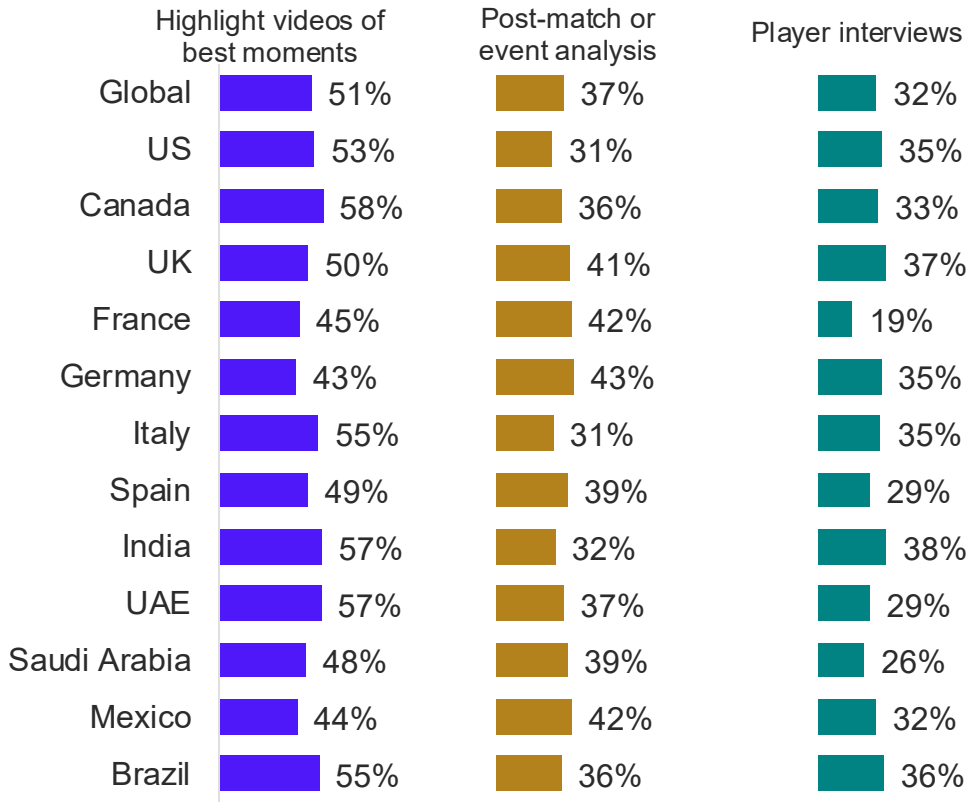
= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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

Highlight videos are by far the most popular form of sports content among fans, followed by post-match analysis and player interviews

Top 3 Types of Information Consumed When Engaging with Additional Content

% selected (select up to 3), Among those engaging with additional content



Top Type of Information Consumed When Engaging with Additional Content

Top response, Among those engaging with additional content

Age Groups	18-29	30-44	45-54	55+
Global	**Highlights – 48%**	**Highlights – 51%**	**Highlights – 52%**	**Highlights – 54%**
US	Highlights	Highlights	Highlights	Highlights
Canada	Highlights	Highlights	Highlights	Highlights
UK	Highlights	Highlights	Highlights	Highlights
France	Analysis	Highlights	Highlights	Highlights
Germany	Highlights	Highlights	Analysis	Analysis
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	Analysis (RT)
Mexico	Highlights	Highlights	Highlights	Highlights
Brazil	Highlights	Highlights	Highlights	Highlights

Highlights
= Highlight videos of best moments

Analysis
= Post-match or event analysis / recap

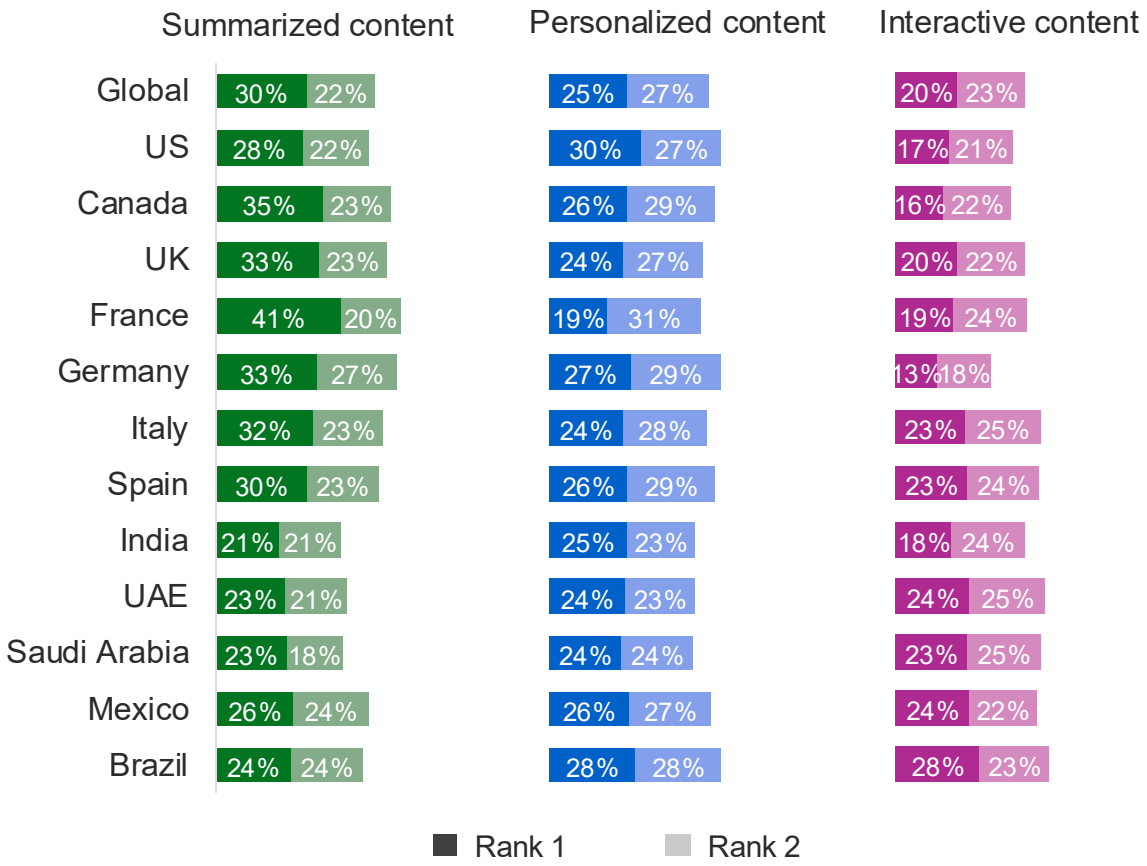
Analysis (RT)
= Near real-time analysis of play

IBM20a When engaging with additional sports content, what types of information are you consuming most? Select up to three.
Sample sizes: Global = 18763n, US = 1806n, Canada = 1800n, UK = 1843n, France = 1638n, Germany = 1883n, Italy = 1704n, Spain = 1829n, India = 2160n, UAE = 989n, Saudi Arabia = 1008n, Mexico = 1143n, Brazil = 960n

Fans overall prioritize summaries when engaging with content; younger fans are more likely to prioritize personalization

Ranking of Top 2 Most Important Sports Content Criteria

Among those who consume additional sports content



Most Important Aspect of Sports Content

% ranked 1, Among those who consume additional sports content

Age Groups	18-29	30-44	45-54	55+
Global	**Personal – 25%**	**Summary – 27%**	**Summary – 30%**	**Summary – 40%**
US	Personal	Summary	Personal	Summary
Canada	Personal	Summary	Summary	Summary
UK	Summary	Summary	Summary	Summary
France	Summary	Summary	Summary	Summary
Germany	Personal	Summary	Summary	Summary
Italy	Interactive	Summary	Summary	Summary
Spain	Interactive	Interactive	Summary	Summary
India	Games	Personal	Personal	Personal
UAE	Interactive	Summary	Personal	Personal
Saudi Arabia	Personal	Summary	Interactive	Interactive
Mexico	Personal	Summary	Summary Interactive	Summary
Brazil	Summary* Interactive	Personal	Personal	Interactive

*Tied for top 1

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 that makes me feel closer to the in-person action

Games
= I want to play games

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.
Sample sizes: Global = 18763n, US = 1806n, Canada = 1800n, UK = 1843n, France = 1638n, Germany = 1883n, Italy = 1704n, Spain = 1829n, India = 2160n, UAE = 989n, Saudi Arabia = 1008n, Mexico = 1143n, Brazil = 960n

Across markets, more fans now rank engaging with others and community as either their 1st or 2nd priority when consuming sports content

Community-oriented content is increasingly important across age groups.

2024 vs. 2025: Most Important Sports Content Criteria (Rank 1)

% ranked 1st, Among those who consume additional sports content

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
I want personalized content based on my preferences	31%	30%	26%	26%	25%	24%	22%	19%	27%	27%	27%	24%	26%	26%	28%	25%	25%	24%	26%	24%
I want summarized content that saves me time	31%	28%	39%	35%	41%	33%	37%	41%	37%	33%	33%	32%	35%	30%	22%	21%	24%	23%	23%	23%
I want interactive content that makes me feel closer to the in-person action	16%	17%	14%	16%	17%	20%	21%	19%	11%	13%	23%	23%	22%	23%	18%	18%	23%	24%	24%	23%
I want to play games	13%	14%	13%	12%	10%	11%	11%	11%	17%	18%	10%	12%	12%	11%	21%	23%	16%	15%	17%	15%
I want to engage with other fans and feel a closer sense of community	9%	11%	8%	12%	7%	11%	10%	10%	9%	9%	7%	10%	6%	10%	11%	13%	12%	14%	10%	15%
Sample Sizes	*1958*	*1806*	*1823*	*1800*	*1847*	*1843*	*1662*	*1638*	*1851*	*1883*	*1728*	*1704*	*1734*	*1829*	*1992*	*2160*	*1031*	*989*	*980*	*1008*

2024 vs. 2025: Second Most Important Sports Content Criteria (Rank 2)

% ranked 2nd, Among those who consume additional sports content

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
I want personalized content based on my preferences	28%	27%	34%	29%	31%	27%	31%	31%	31%	29%	32%	28%	31%	29%	24%	23%	24%	23%	23%	24%
I want summarized content that saves me time	27%	22%	22%	23%	24%	23%	24%	20%	26%	27%	23%	23%	22%	23%	22%	21%	22%	21%	26%	18%
I want interactive content that makes me feel closer to the in-person action	23%	21%	23%	22%	24%	22%	25%	24%	19%	18%	27%	25%	28%	24%	26%	24%	23%	25%	22%	25%
I want to engage with other fans and feel a closer sense of community	13%	17%	10%	15%	12%	18%	10%	15%	11%	14%	9%	15%	9%	15%	15%	19%	14%	19%	16%	20%
I want to play games	9%	13%	11%	12%	9%	11%	11%	10%	12%	11%	10%	9%	9%	9%	14%	14%	17%	12%	12%	13%
Sample Sizes	*1958*	*1806*	*1823*	*1800*	*1847*	*1843*	*1662*	*1638*	*1851*	*1883*	*1728*	*1704*	*1734*	*1829*	*1992*	*2160*	*1031*	*989*	*980*	*1008*

= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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.

73% of fans use mobile sports apps, with sports-focused social media and live streaming apps being the most popular choices; League apps are mostly popular in North America

Types of Mobile Sports Apps Used

% selected, Among all sports fans

	Sports social media platforms	Live streaming apps	Official team apps	Sports news & editorial aggregator	Official league apps	Sports analytics / stats app	Fantasy sports app	Total Using Sports Apps
Global	35%	32%	23%	22%	20%	16%	13%	73%
US	27%	27%	20%	28%	38%	13%	16%	71%
Canada	25%	21%	20%	20%	29%	13%	12%	63%
UK	30%	26%	29%	35%	15%	16%	14%	72%
France	25%	22%	22%	7%	10%	12%	4%	58%
Germany	34%	24%	25%	10%	20%	14%	9%	66%
Italy	25%	22%	18%	7%	10%	11%	6%	59%
Spain	28%	30%	23%	11%	16%	16%	10%	69%
India	51%	53%	27%	38%	24%	25%	31%	91%
UAE	55%	49%	24%	36%	24%	21%	18%	90%
Saudi Arabia	59%	48%	20%	27%	15%	16%	16%	91%
Mexico	47%	37%	22%	28%	24%	21%	7%	85%
Brazil	45%	43%	23%	31%	17%	19%	5%	83%

Most Popular Type of Mobile Sports App

Top response, Among all sports fans

Age Groups	18-29	30-44	45-54	55+
Global	**Social – 45%**	**Social – 42%**	**Social – 35%**	**Live* – 21%**
US	League	League	League	League*
Canada	League** Social	League	Social*	League*
UK	Social	Social	News	News*
France	Social	Social	Team*	Live*
Germany	Social	Social	Social*	Social*
Italy	Live	Social*	Social*	Social*
Spain	Social	Social	Social	Live*
India	Live	Live	Social	Social
UAE	Social	Social	Social	Live
Saudi Arabia	Social	Social	Social	Social
Mexico	Social	Social	Social	Live
Brazil	Social	Live	Social	Social

*A higher percentage of respondents said they do not use any sports apps
**Tied for top 1

Sports app adoption is strongest among the youngest fans. 87% of fans ages 18-29 use them, while usage steadily declines with age (Ages: 30-44 = 82%, 45-54 = 74%, 55+ = 51%).

Social = Sports social media platforms

Live = Live streaming apps specific for sports

League = Official league apps (NFL, NBA, MLB)

News = Sports news & editorial aggregator

Team = Official team apps

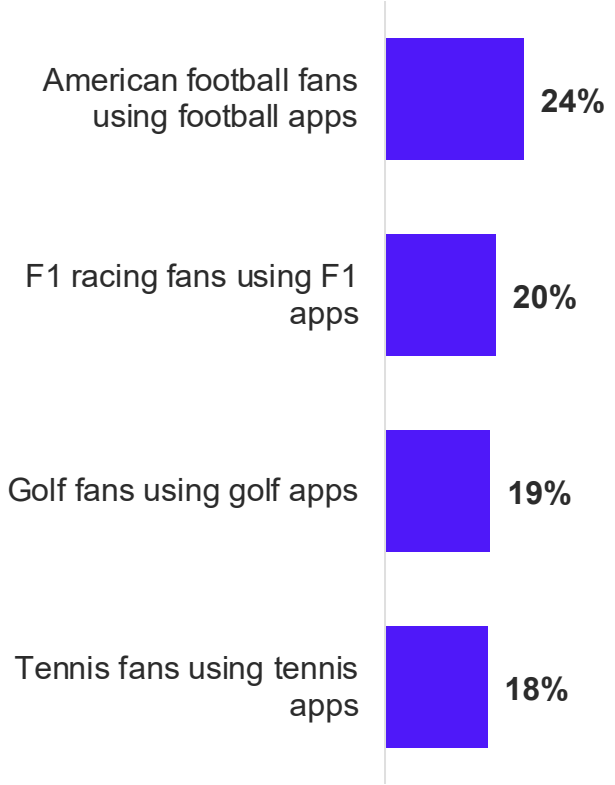
IBM27 What types of sports mobile apps do you currently use? Select all that apply.
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

SPORTS APP USAGE

24% of football fans turn to dedicated football apps, while around 20% F1, golf, and tennis fans use apps tailored to their favorite sports

Sports App Use by Sport Type (Across Key Sports)

% selected "Mobile sports apps", Among fans of specific sports



There's an opportunity for golf to boost app engagement among 18-29-year-old fans, where usage currently lags behind fans 30-44.

Sports App Use by Sport Type (Across Key Sports)

% selected "Mobile sports apps", Among fans of specific sports

Age Groups	18-29	30-44	45-54	55+
American Football Fans	**29%**	**30%**	25%	15%
F1 Racing Fans	**25%**	**24%**	18%	12%
Golf Fans	**21%**	**26%**	21%	10%
Tennis Fans	**24%**	**24%**	19%	10%

Sports app engagement is strongest among fans ages 18-44, with notable participation from those 45-54 as well.

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.
Sample Sizes: Tennis = 7095n, Golf = 2040n, American football = 4329n, F1 racing = 6198n

SPORTS APP USAGE

Official league apps and sports news apps are particularly popular among football and golf fans

Types of Mobile Sports Apps Used (Across Key Sports)

% selected, Among all sports fans

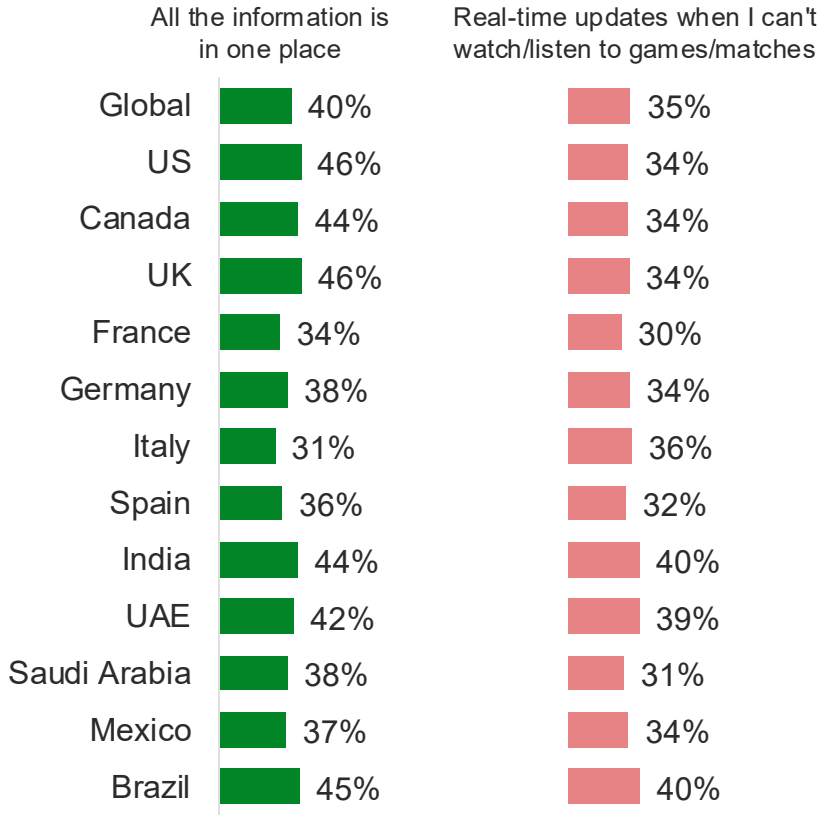
	Sports social media platforms	Live streaming apps	Official team apps	Sports news & editorial aggregator	Official league apps	Sports analytics / stats app	Fantasy sports app	Total Using Sports Apps
American Football Fans	37%	34%	28%	**34%**	**42%**	19%	19%	**79%**
Golf Fans	38%	35%	31%	**36%**	**36%**	24%	22%	**79%**
F1 Racing Fans	40%	37%	28%	27%	26%	21%	15%	**78%**
Tennis Fans	36%	35%	27%	26%	23%	20%	14%	**74%**

IBM27 What types of sports mobile apps do you currently use? Select all that apply.
Sample Sizes: Tennis = 7095n, Golf = 2040n, American football = 4329n, F1 racing = 6198n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

Fans rely on sports apps for centralized sports information and real-time updates when they can't watch games live

Top 2 Reasons for Using Sports Apps

% selected, Among sports app users



Top Reason for Using Sports Apps

Top response, Among sports app users

Age Groups	18-29	30-44	45-54	55+
Global	**Consolidation – 36%**	**Consolidation – 39%**	**Consolidation – 42%**	**Consolidation – 47%**
US	Consolidation	Consolidation	Consolidation	Consolidation
Canada	Consolidation	Consolidation	Consolidation	Consolidation
UK	Consolidation	Consolidation	Consolidation	Consolidation
France	Consolidation	Player Updates	Consolidation	Consolidation
Germany	Player updates	Consolidation	Consolidation	Consolidation
Italy	Consolidation	Real-Time	Real-Time	Real-Time
Spain	Exclusive	Consolidation	Consolidation	Consolidation
India	Consolidation	Consolidation	Consolidation	Consolidation
UAE	Player Updates* Consolidation	Consolidation	Consolidation	Real-Time
Saudi Arabia	Exclusive	Consolidation	Exclusive	Real-Time
Mexico	Consolidation	Exclusive	Consolidation	Real-Time* Stats
Brazil	Consolidation	Consolidation	Consolidation	Consolidation

*Tied for top 1

Consolidation
= All the information is in one place

Real-Time
= Real-time updates when I can't watch/listen to games/matches

Player Updates
= Engaging with other fans, social sharing (post highlights, photos, etc.)

Exclusive
= Access to exclusive content

Stats
= More in-depth statistics than broadcast

IBM30 What primarily motivates you to use sports apps? Select all that apply.
Sample sizes: Global = 15156n, US = 1454n, Canada = 1289n, UK = 1472n, France = 1191n, Germany = 1345n, Italy = 1203n, Spain = 1402n, India = 2020n, UAE = 923n, Saudi Arabia = 952n, Mexico = 1038n, Brazil = 867n

Year-round sports app usage is highest for official team apps, particularly in the UK, Spain, and Brazil

Year-Round Use of Sports Apps

% Year-round use, Among those who use each type of app

	Official team apps	Official league apps	Fantasy sports app
Global	51%	45%	43%
US	53%	54%	45%
Canada	49%	45%	35%
UK	58%	44%	39%
France	48%	42%	36%
Germany	47%	47%	42%
Italy	45%	38%	44%
Spain	56%	38%	41%
India	45%	48%	46%
UAE	52%	45%	45%
Saudi Arabia	52%	48%	49%
Mexico	48%	37%	48%
Brazil	57%	38%	45%

Year-Round Use of Official Team Apps

% Year-round use of official team apps, Among those who use official team apps

Age Groups	18-29	30-44	45-54	55+
Global	**44%**	**53%**	**54%**	**51%**
US	47%	56%	59%	50%
Canada	41%	51%	54%	48%
UK	42%	55%	66%	65%
France	43%	59%	41%	47%
Germany	43%	49%	50%	45%
Italy	35%	55%	39%	44%
Spain	40%	59%	61%	58%
India	38%	47%	54%	*N size too small to show*
UAE	49%	51%	53%	*N size too small to show*
Saudi Arabia	57%	47%	*N size too small to show*	*N size too small to show*
Mexico	54%	49%	55%	26%
Brazil	57%	63%	48%	51%

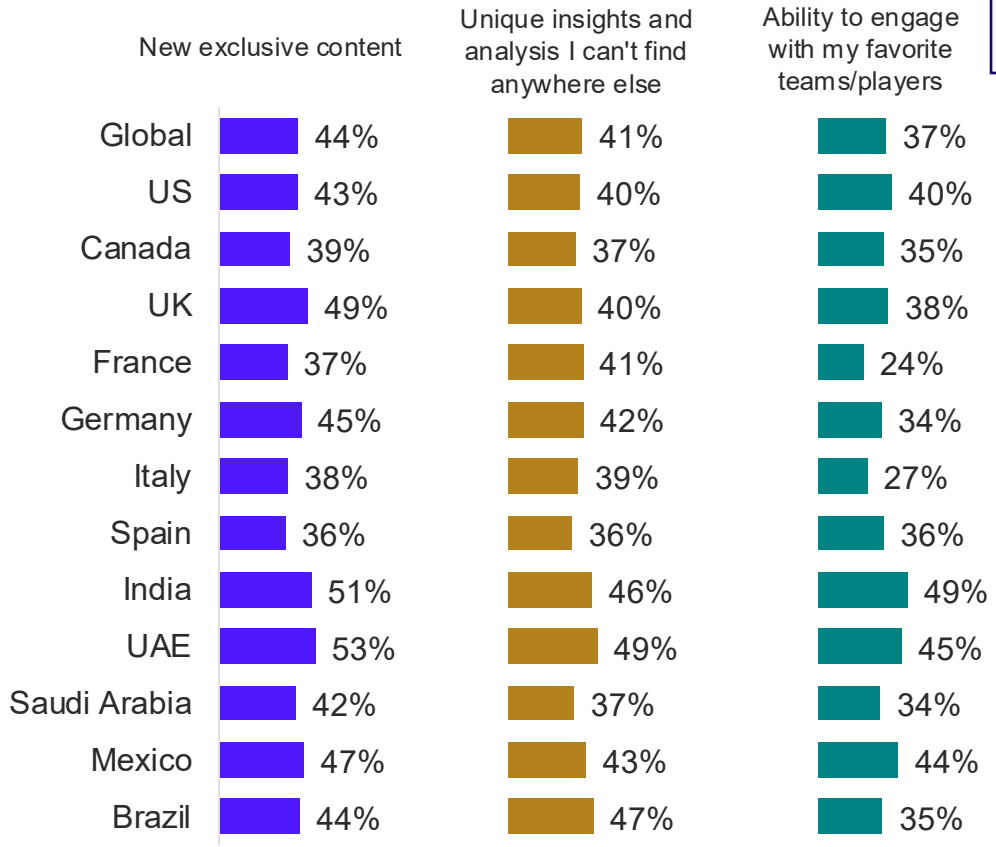
Year-round official team app usage is highest among fans aged 30-54

IBM29 When do you typically use the following sports apps?
Sample Sizes: Global = 2635-4756n, US = 338-785n, Canada = 246-596n, UK = 278-593n, France = 84-446n, Germany = 183-503n, Italy = 124-366n, Spain = 196-475n, India = 529-691n, UAE = 186-244n, Saudi Arabia = 156-213n, Mexico = 89-295n, Brazil = 53-243n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

Exclusive content, unique analysis, and team/player engagement are the top drivers of year-round sports app usage

Top 3 Drivers of Year-Round Official Team App Usage

% selected, Among those who use official team apps



The top 3 drivers of year-round use are the same for official team and league apps.

Top Driver of Year-Round Official Team App Usage

Top response, Among those who use official team apps

Age Groups	18-29	30-44	45-54	55+
Global	**Exclusive – 43%**	**Exclusive – 46%**	**Exclusive – 43%**	**Analysis – 44%**
US	Personal	Exclusive	Exclusive* Teams/Players	Exclusive* Analysis
Canada	Analysis	Exclusive	Analysis	Exclusive
UK	Exclusive	Exclusive	Exclusive Analysis	Exclusive
France	Exclusive	Exclusive	Analysis	Analysis
Germany	Exclusive	Exclusive	Exclusive	Analysis
Italy	Exclusive	Exclusive	Exclusive	Analysis
Spain	Teams/Players	Exclusive	Exclusive	Analysis
India	Exclusive	Exclusive	Exclusive	*N size too small to show*
UAE	Exclusive	Exclusive	Community	*N size too small to show*
Saudi Arabia	Exclusive	Exclusive	*N size too small to show*	*N size too small to show*
Mexico	Exclusive	Exclusive	Analysis	Analysis
Brazil	Personal	Analysis* Exclusive	Analysis	Analysis

*Tied for top 1

Personalization may motivate year-round engagement among 18-29-year-old sports app users in both the US and Brazil.

Exclusive
= New exclusive content (e.g., behind the scenes, interviews)

Analysis
= Unique insights and analysis I can't find anywhere else

Personal
= Personalized recommendations

Teams/Players
= Ability to engage with my favorite teams/players

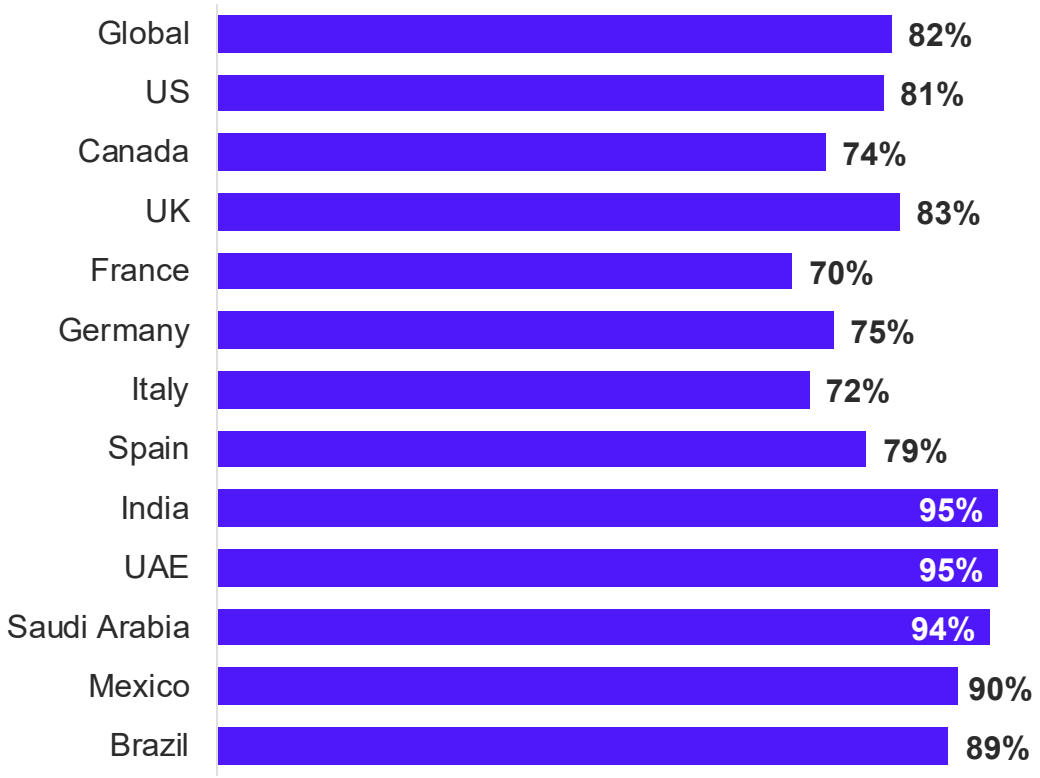
Community
= Community interaction & fan discussions

IBM29a What drives you/would drive you to keep using the following sports apps all year round? Select all that apply.
Sample Sizes: Global = 4756n, US = 401n, Canada = 405n, UK = 593n, France = 446n, Germany = 503n, Italy = 366n, Spain = 475n, India = 603n, UAE = 242n, Saudi Arabia = 213n, Mexico = 266n, Brazil = 243n

Overall sports app usage jumps to 82% among in-person event attendees; Of those, 91% use apps during live events

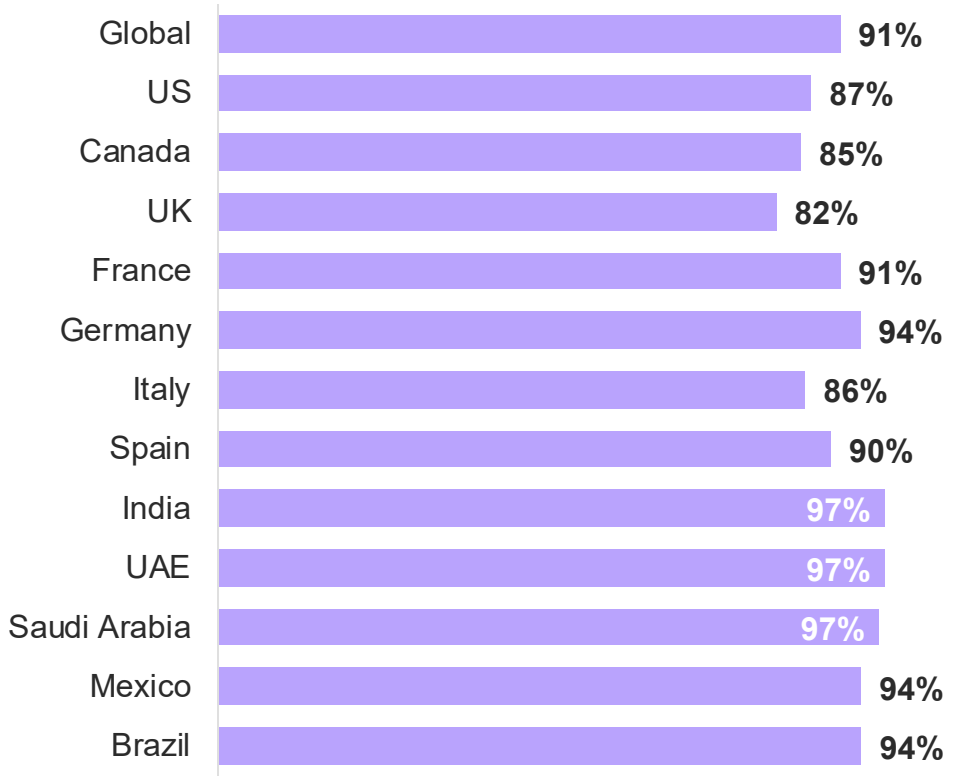
Overall Sports App Usage Among In-Person Sporting Event Attendees

% that did NOT select "I do not use any sports mobile apps", Among those who attend live sporting events in person



In-Person Sports App Usage Among In-Person Sporting Event Attendees

% that did NOT select "I do not use sports apps while attending live sporting events", Among sports app users who attend live sporting events in person

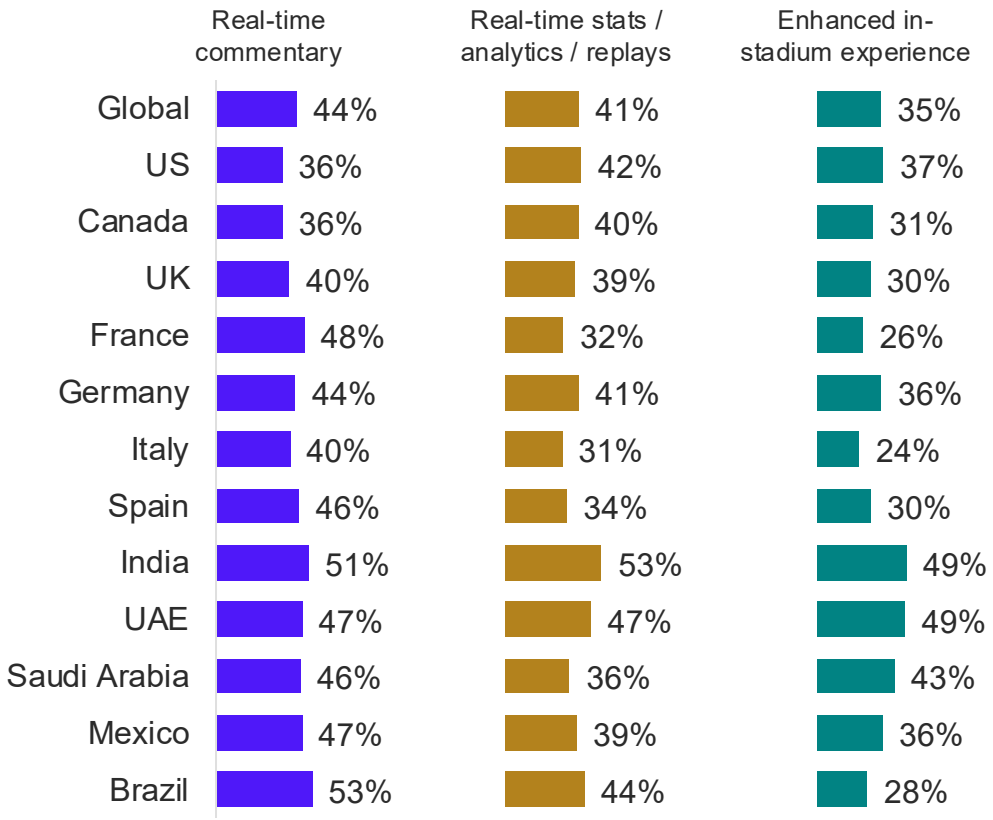


IBM27 What types of sports mobile apps do you currently use? Select all that apply. / IBM28 What features are you most likely to engage with on a sports app while attending a live sporting event in-person? Select all that apply.
Sample Sizes: In-person sporting event attendees; Global = 15254n, US = 1418n, Canada = 1448n, UK = 1473n, France = 1419n, Germany = 1573n, Italy = 1269n, Spain = 1503n, India = 1823n, UAE = 838n, Saudi Arabia = 769n, Mexico = 928n, Brazil = 793n; In-person sporting event attendees using sports apps; Global = 12531n, US = 1153n, Canada = 1074n, UK = 1219n, France = 992n, Germany = 1185n, Italy = 919n, Spain = 1193n, India = 1740n, UAE = 795n, Saudi Arabia = 722n, Mexico = 835n, Brazil = 704n

Fans outside North America primarily use apps for commentary during in-person events, while North American fans are more likely to use analytics features

Top 3 Sports App Features Used While Attending Live Events

% selected, Among sports app users who attend live sporting events in person



Top Sports App Features Used While Attending Live Events

Top response, Among sports app users who attend live sporting events in person

Age Groups	18-29	30-44	45-54	55+
Global	**Commentary – 42%**	**Commentary – 44%**	**Commentary – 47%**	**Commentary – 46%**
US	Social	Stats	Stats	Stats
Canada	Stats	Stats	Stats	Commentary
UK	Stats	Stats	Commentary	Commentary**
France	Commentary	Commentary	Commentary	Commentary
Germany	Commentary	Commentary	Commentary	Commentary
Italy	Commentary* Stats	Commentary	Commentary	Commentary
Spain	Social	Commentary	Commentary	Commentary
India	Stats	Stats	Enhanced	Commentary
UAE	Social	Enhanced	Commentary	Enhanced
Saudi Arabia	Commentary	Commentary	Commentary	Stats
Mexico	Commentary	Commentary	Commentary	Commentary
Brazil	Commentary	Commentary	Commentary	Commentary

*Tied for top 1

**A higher percentage of respondents said they do not use any sports apps while attending live sporting events

Sports app engagement is strong across all age groups during live events, but peaks among younger fans (Ages: 18-29 = 95%, 30-44 = 94%, 45-54 = 89%, 55+ = 79%).

Commentary
= Real-time commentary

Stats
= Real-time stats, analytics and replays (not shown in stadium)

Social
= Engaging with other fans, social sharing (post highlights, photos, etc.)

Enhanced
= Enhanced in-stadium experience (seat upgrades, in-seat food & beverage ordering, interactive fan polls/games, etc.)

IBM28 What features are you most likely to engage with on a sports app while attending a live sporting event in-person? Select all that apply.
Sample sizes: Global = 12531n, US = 1153n, Canada = 1074n, UK = 1219n, France = 992n, Germany = 1185n, Italy = 919n, Spain = 1193n, India = 1740n, UAE = 795n, Saudi Arabia = 722n, Mexico = 835n, Brazil = 704n

In-person app usage is high across key sports fanbases; Tennis and golf fans are more likely to use real commentary app features while at live events

Sports App Features Used While Attending Live Events

% selected, Among sports app users who attend live sporting events in person

	Real-time stats, analytics and replays (not shown in stadium)	Real-time commentary	Engaging with other fans, social sharing (post highlights, photos, etc.)	Enhanced in-stadium experience	Historical insights and analysis (player/team comparisons)	Venue navigation & logistics	% using sports apps in-person
American Football Fans	48%	43%	39%	41%	34%	24%	**90%**
F1 Racing Fans	46%	**47%**	36%	40%	33%	24%	**92%**
Golf Fans	49%	43%	39%	43%	34%	25%	**87%**
Tennis Fans	45%	**47%**	35%	39%	35%	24%	**91%**

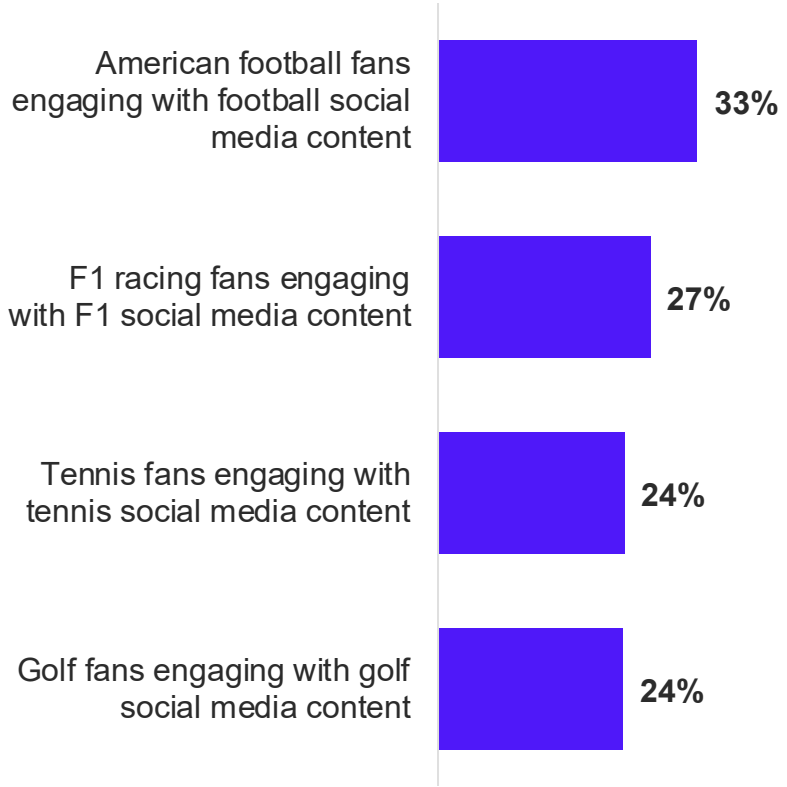
IBM28 What features are you most likely to engage with on a sports app while attending a live sporting event in-person? Select all that apply.
Sample Sizes: F1 Racing Fans = 4196n, Tennis Fans = 4514n, American Football Fans = 2945n, Golf Fans = 1451n

SPORTS INFLUENCER ENGAGEMENT

Social media is a key touchpoint for sports fans, with football leading the way; One in three fans engage with football content, while roughly a quarter of F1, tennis, and golf fans connect with their sports on social platforms

Social Media Engagement by Sport Type (Across Key Sports)

% selected "Social media accounts/posts", Among fans of specific sports



Nearly half of football fans ages 18-29 engage with football-specific content on social media.

Social Media Engagement by Sport Type (Across Key Sports)

% selected "Social media accounts/posts", Among fans of specific sports

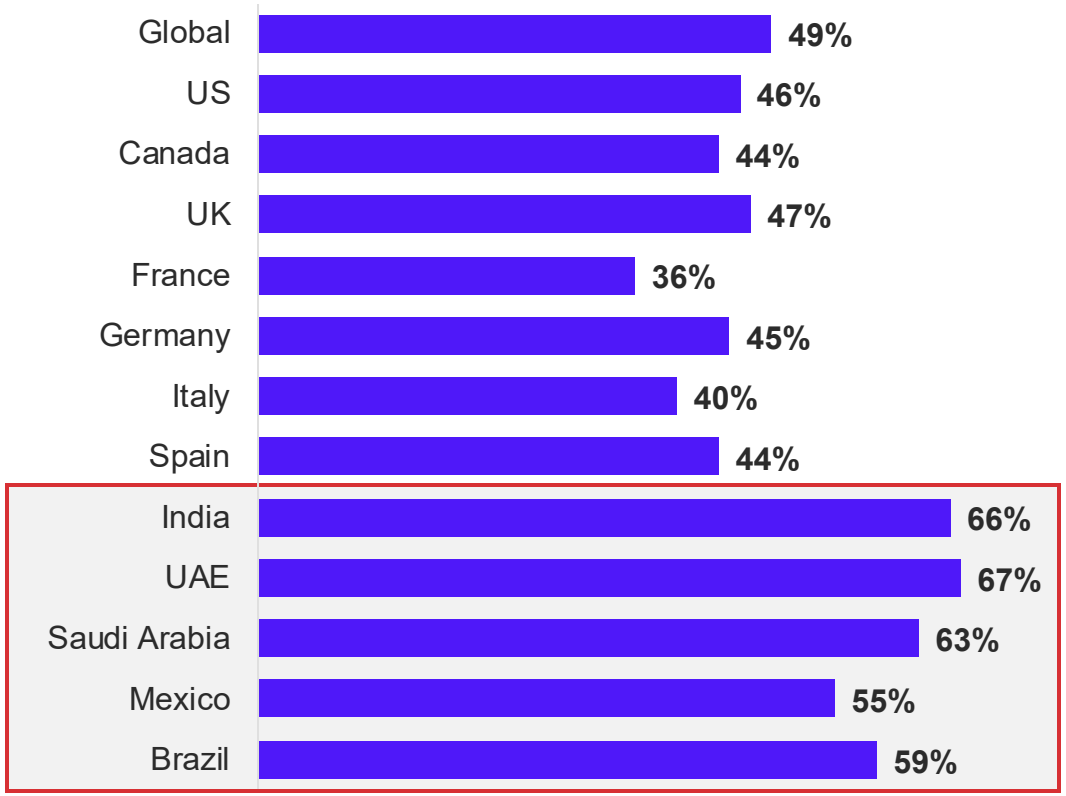
Age Groups	18-29	30-44	45-54	55+
American Football Fans	**46%**	40%	34%	17%
F1 Racing Fans	42%	35%	23%	12%
Golf Fans	36%	34%	23%	11%
Tennis Fans	35%	33%	23%	11%

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.
Sample Sizes: Tennis = 7095n, Golf = 2040n, American football = 4329n, F1 racing = 6198n

Nearly half of sports fans follow sports content creators and influencers, with engagement peaking among fans aged 18-44 and in markets like India, the UAE, Saudi Arabia, Mexico, and Brazil.

Sports Fans Who Follow Sports Influencers

% selected, Among all sports fans



Sports Fans Who Follow Sports Influencers

% selected, Among all sports fans

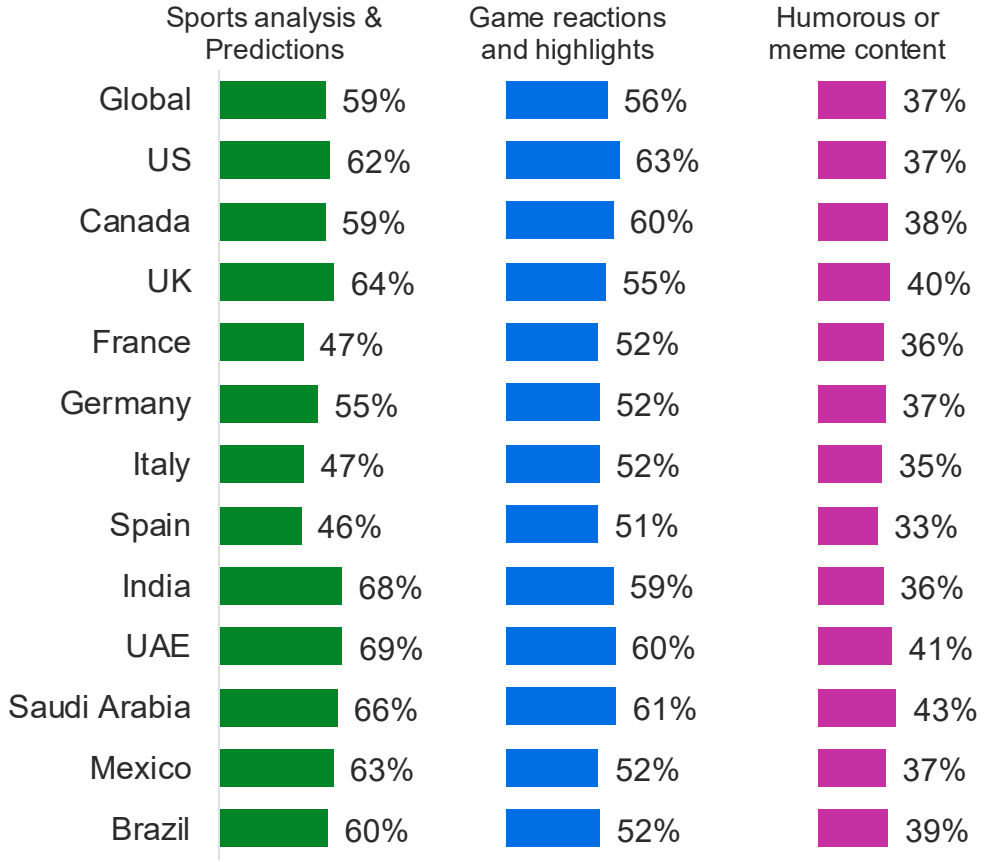
Age Groups	18-29	30-44	45-54	55+
Global	**59%**	**59%**	**49%**	**31%**
US	57%	54%	52%	33%
Canada	59%	54%	42%	29%
UK	59%	60%	48%	31%
France	56%	49%	36%	21%
Germany	60%	53%	42%	30%
Italy	53%	51%	44%	29%
Spain	54%	51%	48%	29%
India	66%	68%	63%	68%
UAE	62%	71%	61%	68%
Saudi Arabia	63%	65%	60%	58%
Mexico	53%	60%	56%	44%
Brazil	60%	66%	58%	40%

IBM36 Which of the following types of content creators or influencers do you follow on social media (e.g., TikTok, YouTube, Instagram, etc.)?
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

Fans seek out highlights most often when engaging with sports content broadly, but look for deeper analysis and predictions when following sports influencers

Top 3 Most Popular Types of Content from Sports Influencers

% selected (select up to 3), Among those who follow sports influencers



Top Content from Sports Influencers

Top response, Among those who follow sports influencers

Age Groups	18-29	30-44	45-54	55+
Global	**Analysis – 55%**	**Analysis – 60%**	**Analysis – 61%**	**Analysis – 61%**
US	Highlights	Analysis	Analysis	Highlights
Canada	Highlights* Analysis	Analysis	Highlights	Highlights
UK	Analysis	Analysis	Analysis	Analysis
France	Highlights	Highlights	Highlights	Highlights
Germany	Analysis	Highlights	Analysis	Highlights
Italy	Highlights	Highlights	Highlights	Highlights
Spain	Meme	Highlights	Highlights	Highlights
India	Analysis	Analysis	Analysis	Analysis
UAE	Highlights	Analysis	Analysis	Analysis
Saudi Arabia	Analysis	Analysis	Analysis	Highlights* Analysis
Mexico	Analysis	Analysis	Highlights	Analysis
Brazil	Highlights	Analysis	Analysis	Analysis

*Tied for top response

Analysis = Sports analysis & predictions

Highlights = Game reactions and highlights

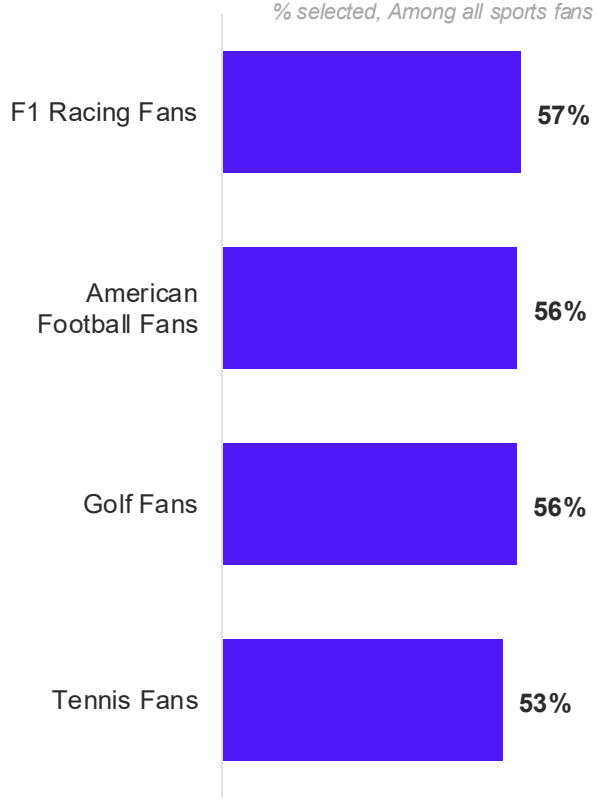
Meme = Humorous or meme content

IBM36a You mentioned you follow **sports influencers or content creators**. What kind of content from these sports creators do you enjoy most? Select up to 3.
Sample sizes: Global = 10280n, US = 938n, Canada = 897n, UK = 967n, France = 730n, Germany = 927n, Italy = 821n, Spain = 889n, India = 1463n, UAE = 693n, Saudi Arabia = 662n, Mexico = 676n, Brazil = 617n

The majority across key sports fanbases engage with sports influencers; Sports analysis content is most popular among golf fans

Sports Fans Who Follow Sports Influencers (Across Key Sports)

% selected, Among all sports fans



Most Popular Types of Content from Sports Influencers

% selected (select up to 3), Among those who follow sports influencers

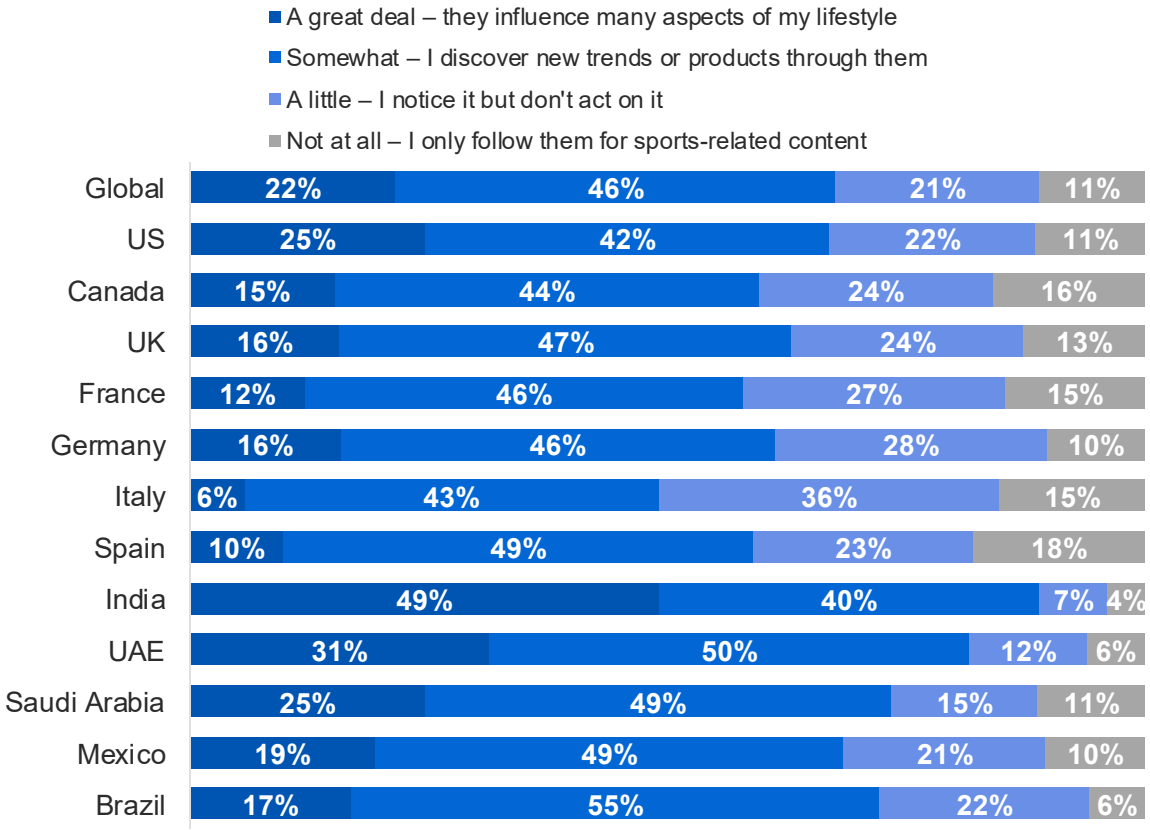
	Sports analysis / predictions	Game reactions / highlights	Humorous or meme content	Behind-the-scenes or lifestyle content	Crossover content	Fashion or gear reviews
F1 Racing Fans	62%	58%	38%	36%	26%	21%
American Football Fans	66%	63%	36%	37%	25%	21%
Golf Fans	68%	63%	37%	39%	22%	20%
Tennis Fans	62%	58%	36%	37%	25%	22%

IBM36 Which of the following types of content creators or influencers do you follow on social media (e.g., TikTok, YouTube, Instagram, etc.)? / IBM36a You mentioned you follow **sports influencers or content creators**. What kind of content from these sports creators do you enjoy most? Select up to 3.
Sample Sizes: Tennis = 7095n, Golf = 2040n, American football = 4329n, F1 racing = 6198n; Those who follow sports influencers; Tennis Fans = 3790n, Golf Fans = 1146n, American Football Fans = 2436n, F1 Racing Fans = 3526n

89% of followers also engage with sports influencers' content beyond sports, and over 1-in-5 say these creators influence many aspects of their lifestyle

Impact of Sports Influencers on Fans' Lifestyle

Among those who follow sports influencers



Share of Fans Greatly Influenced by Sports Influencers Beyond Sports

% a great deal, Among those who follow sports influencers

Age Groups	18-29	30-44	45-54	55+
Global	**27%**	**25%**	**18%**	**10%**
US	34%	31%	24%	10%
Canada	22%	16%	14%	7%
UK	21%	20%	14%	6%
France	23%	9%	9%	8%
Germany	21%	21%	8%	8%
Italy	9%	5%	7%	4%
Spain	15%	11%	8%	5%
India	43%	54%	52%	43%
UAE	25%	34%	31%	28%
Saudi Arabia	22%	28%	21%	22%
Mexico	27%	21%	10%	9%
Brazil	22%	16%	13%	16%

Sports fans ages 18-44 are more likely than older fans to be influenced by sports content creators on topics beyond sports.

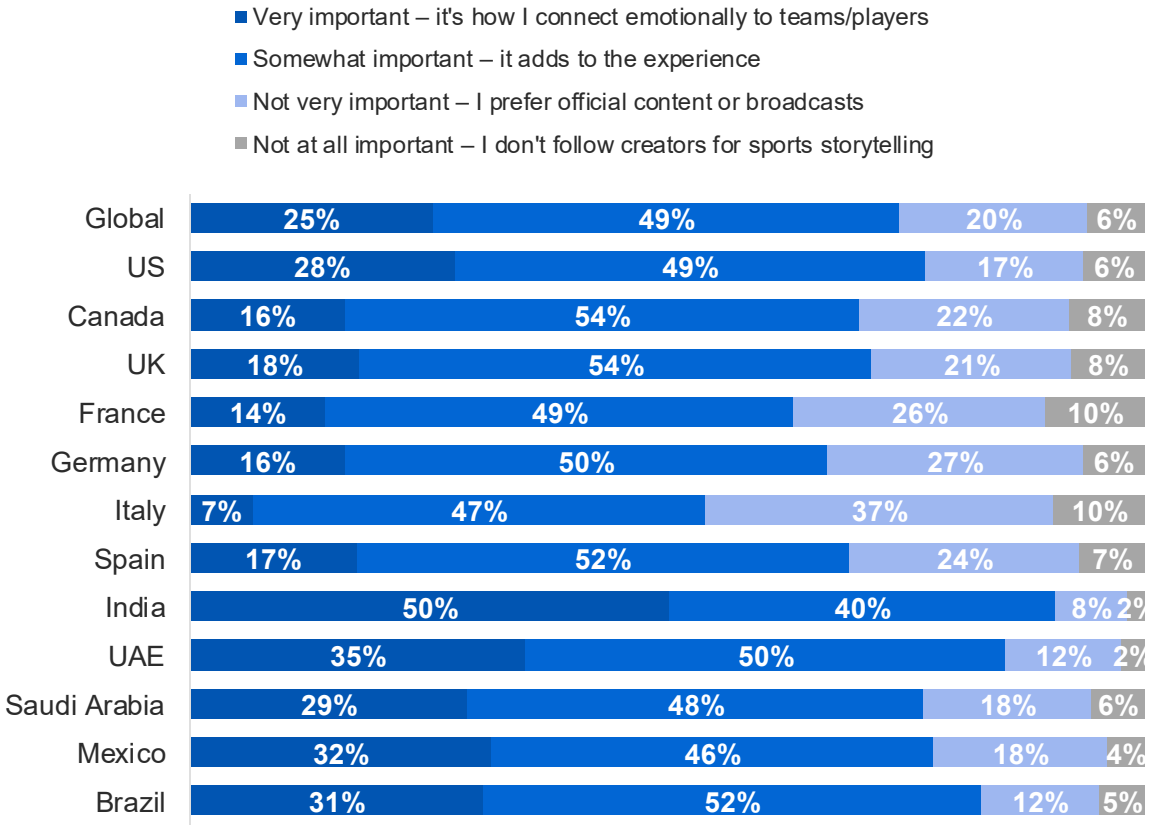
IBM36b How much do **sports influencers or content creators** shape your opinions or awareness of areas beyond sports — such as fashion, music, technology, or lifestyle?

Sample sizes: Global = 10280n, US = 938n, Canada = 897n, UK = 967n, France = 730n, Germany = 927n, Italy = 821n, Spain = 889n, India = 1463n, UAE = 693n, Saudi Arabia = 662n, Mexico = 676n, Brazil = 617n

Storytelling is key: 74% of followers say that sports creators' storytelling is important to how they experience or connect with sports

Importance of Storytelling by Sports Influencers

Among those who follow sports influencers



Fans Who Say Storytelling is Very Important

% very important, Among those who follow sports influencers

Age Groups	18-29	30-44	45-54	55+
Global	**30%**	**28%**	**24%**	**14%**
US	35%	31%	31%	16%
Canada	21%	15%	22%	10%
UK	24%	20%	16%	10%
France	20%	14%	10%	11%
Germany	17%	19%	15%	11%
Italy	10%	6%	8%	5%
Spain	26%	15%	19%	13%
India	47%	54%	54%	38%
UAE	32%	37%	34%	31%
Saudi Arabia	31%	31%	22%	27%
Mexico	30%	36%	28%	22%
Brazil	33%	31%	25%	35%

Sports storytelling is most important to followers ages 18-44.

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IBM36c How important is storytelling by **sports influencers or content creators** in how you experience or connect with sports?
Sample sizes: Global = 10280n, US = 938n, Canada = 897n, UK = 967n, France = 730n, Germany = 927n, Italy = 821n, Spain = 889n, India = 1463n, UAE = 693n, Saudi Arabia = 662n, Mexico = 676n, Brazil = 617n

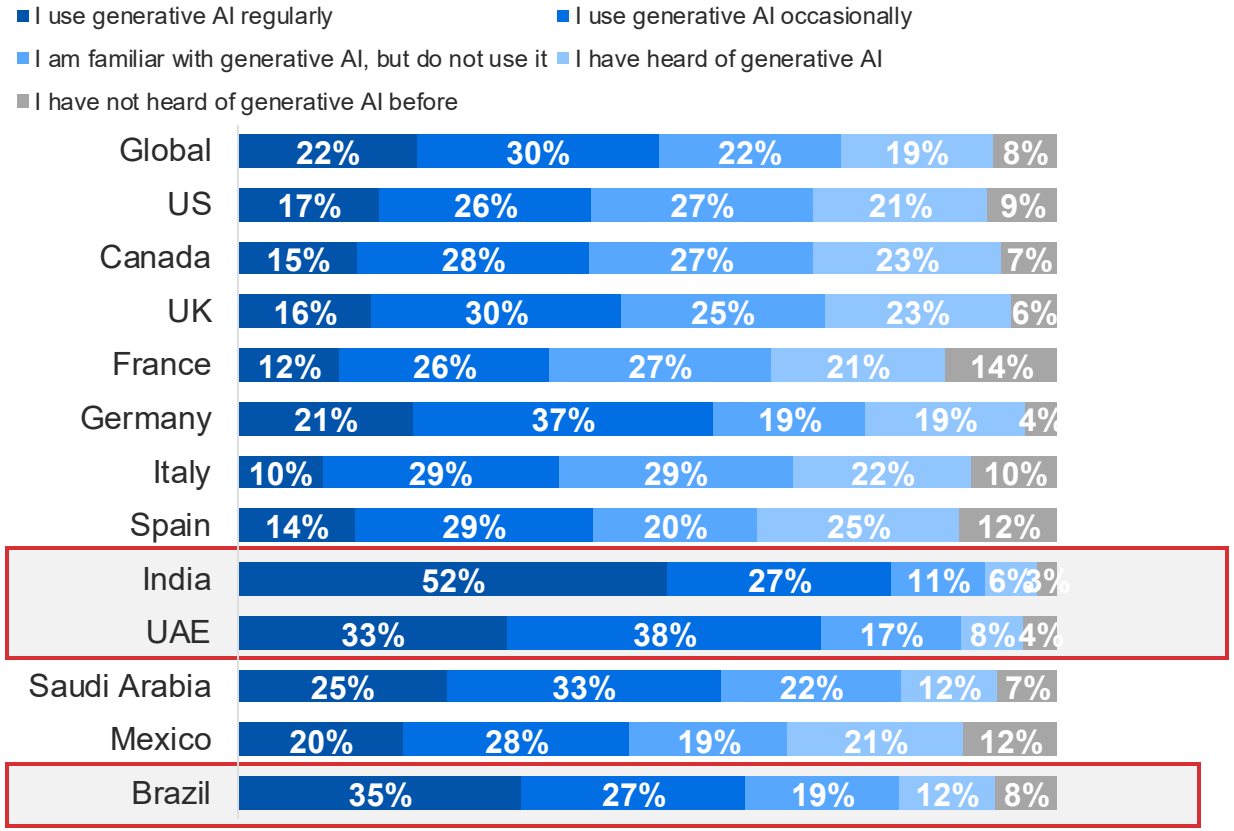
SECTION 2

Technology’s Role in Sports

22% of global sports fans use AI regularly and another 30% use it occasionally; Regular AI usage is highest among fans in India, the UAE, and Brazil

Familiarity with AI

Among all sports fans



AI Usage

% using generative AI regularly or occasionally, Among all sports fans

Age Groups	18-29	30-44	45-54	55+
Global	**65%**	**59%**	**52%**	**32%**
US	**54%**	**54%**	48%	28%
Canada	**60%**	51%	44%	26%
UK	**61%**	55%	54%	30%
France	**56%**	45%	39%	27%
Germany	**70%**	65%	55%	45%
Italy	**59%**	49%	40%	28%
Spain	**57%**	52%	46%	28%
India	79%	**81%**	**81%**	72%
UAE	**78%**	73%	61%	63%
Saudi Arabia	**69%**	56%	50%	45%
Mexico	46%	48%	**50%**	46%
Brazil	**70%**	68%	58%	41%

IBM22 Which of these best describes your knowledge of generative AI (e.g., ChatGPT)?
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

Total AI use among sports fans significantly increased from 2024 across nearly all re-tested markets

2024 vs. 2025: Familiarity with AI

% selected, Among all sports fans

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
I use generative AI regularly	10%	17%	14%	15%	7%	16%	7%	12%	10%	21%	5%	10%	8%	14%	31%	52%	32%	33%	20%	25%
I use generative AI occasionally	21%	26%	22%	28%	24%	30%	19%	26%	30%	37%	17%	29%	23%	29%	36%	27%	36%	38%	29%	33%
NET: Total AI Usage	**31%**	**43%**	**37%**	**43%**	**31%**	**47%**	**26%**	**38%**	**39%**	**58%**	**22%**	**39%**	**31%**	**43%**	**67%**	**80%**	**69%**	**71%**	**49%**	**59%**
I am familiar with generative AI, but do not use it	32%	27%	28%	27%	33%	25%	33%	27%	26%	19%	31%	29%	22%	20%	19%	11%	16%	17%	25%	22%
I have heard of generative AI	28%	21%	26%	23%	29%	23%	23%	21%	28%	19%	32%	22%	32%	25%	12%	6%	11%	8%	15%	12%
I have not heard of generative AI before	9%	9%	9%	7%	7%	6%	18%	14%	7%	4%	15%	10%	15%	12%	3%	3%	4%	4%	11%	7%
Sample Sizes	*2138*	*2051*	*2007*	*2039*	*2001*	*2046*	*1972*	*2043*	*2010*	*2046*	*2008*	*2036*	*1861*	*2043*	*2033*	*2209*	*1045*	*1028*	*1007*	*1048*

= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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

Real-time updates lead as the most desired way for AI to improve sports engagement, with 35% rating it a high priority

Real-time updates are the highest priority across age groups (Ages: 18-29 = 41%, 30-44 = 40%, 45-54 = 35%, 55+ = 24%).

Top Priorities for Improving Sports Engagement with AI

% high priority, Among those who have at least heard of AI

	Real-Time Updates	Personalized Content	Unique Insights	Meaningful Predictions	Voice Interfaces	Engagement opportunities
Global	35%	30%	29%	27%	26%	22%
US	31%	26%	26%	24%	23%	21%
Canada	25%	20%	19%	17%	15%	12%
UK	28%	21%	19%	17%	15%	14%
France	23%	18%	18%	15%	14%	11%
Germany	31%	24%	25%	21%	20%	16%
Italy	24%	19%	19%	16%	15%	13%
Spain	27%	28%	27%	23%	24%	18%
India	56%	51%	52%	49%	48%	42%
UAE	49%	45%	42%	40%	42%	37%
Saudi Arabia	46%	45%	40%	39%	41%	36%
Mexico	45%	41%	39%	36%	38%	26%
Brazil	54%	50%	48%	43%	41%	32%
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.

IBM23 If generative AI could improve the way you engage with your favorite sports in the future, how would you prioritize the following areas?
Sample sizes: Global = 19202n, US = 1876n, Canada = 1896n, UK = 1928n, France = 1762n, Germany = 1962n, Italy = 1823n, Spain = 1796n, India = 2152n, UAE = 985n, Saudi Arabia = 970n, Mexico = 1085n, Brazil = 967n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

Community is emerging as a growing focus for AI-driven improvements to sports engagement, with engagement opportunities seeing notable year-over-year increases in high-priority ratings in the US, the UK, Germany, Italy, Spain, and India

2024 vs. 2025: Top Priorities for Improving Sports Engagement with AI

% high priority, Among those who have at least heard of AI

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
Real-Time Updates	31%	31%	30%	25%	27%	28%	25%	23%	29%	31%	25%	24%	30%	27%	52%	56%	53%	49%	50%	46%
Personalized Content	26%	26%	24%	20%	19%	21%	21%	18%	20%	24%	17%	19%	29%	28%	48%	51%	52%	45%	50%	45%
Unique Insights	23%	26%	23%	19%	19%	19%	22%	18%	20%	25%	16%	19%	27%	27%	47%	52%	48%	42%	49%	40%
Meaningful Predictions	21%	24%	21%	17%	17%	17%	17%	15%	16%	21%	16%	16%	23%	23%	46%	49%	50%	40%	49%	39%
Voice Interfaces	20%	23%	19%	15%	13%	15%	17%	14%	16%	20%	15%	15%	25%	24%	43%	48%	47%	42%	48%	41%
Engagement Opportunities	18%	21%	16%	12%	10%	14%	12%	11%	14%	16%	10%	13%	15%	18%	39%	42%	44%	37%	41%	36%
Sample Sizes	*1947*	*1876*	*1828*	*1896*	*1861*	*1928*	*1617*	*1762*	*1863*	*1962*	*1701*	*1823*	*1577*	*1796*	*1972*	*2152*	*998*	*985*	*895*	*970*

= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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

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

Sports fans in India ages 30-44 (83%) and 55+ (82%) are most likely to view AI as the technology with the greatest positive impact on sports, compared to other emerging technologies

Positive Impact of Technology on Sports

% very + somewhat positive, Among all sports fans

	Data Analytics	Hawk-Eye Technology (for ball tracking)	Video Assistant Referee	Wearable Technology	Artificial Intelligence (AI)	Virtual Reality (VR)	Augmented Reality (AR)
Global	63%	58%	58%	57%	53%	53%	52%
US	54%	48%	43%	49%	43%	44%	43%
Canada	55%	49%	44%	48%	38%	41%	40%
UK	59%	61%	48%	54%	40%	43%	39%
France	50%	45%	52%	47%	38%	40%	39%
Germany	56%	52%	54%	45%	44%	43%	44%
Italy	55%	49%	52%	49%	44%	45%	43%
Spain	63%	58%	59%	58%	56%	53%	56%
India	81%	76%	76%	78%	80%	77%	75%
UAE	79%	73%	76%	78%	77%	71%	72%
Saudi Arabia	76%	71%	77%	75%	72%	72%	69%
Mexico	70%	65%	65%	63%	63%	62%	65%
Brazil	79%	71%	77%	70%	75%	70%	74%

IBM24 What impact do you think the following technologies will have on sports?
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

Positive perceptions of AI and AR's impact on sports are growing in the US, Germany, and India compared to last year

2024 vs. 2025: Positive Impact of Technology on Sports

% very + somewhat positive, Among all sports fans

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
Data analytics	53%	54%	59%	55%	57%	59%	55%	50%	55%	56%	55%	55%	67%	63%	81%	81%	84%	79%	78%	76%
Wearable technology	50%	49%	54%	48%	55%	54%	53%	47%	43%	45%	49%	49%	63%	58%	78%	78%	83%	78%	80%	75%
Hawk-Eye technology	48%	48%	53%	49%	62%	61%	49%	45%	51%	52%	50%	49%	64%	58%	75%	76%	81%	73%	76%	71%
Virtual reality (VR)	42%	44%	47%	41%	42%	43%	44%	40%	40%	43%	44%	45%	57%	53%	76%	77%	80%	71%	75%	72%
Artificial intelligence (AI	40%	43%	43%	38%	38%	40%	41%	38%	38%	44%	42%	44%	56%	56%	77%	80%	82%	77%	75%	72%
Augmented Reality (AR)	39%	43%	44%	40%	37%	39%	43%	39%	41%	44%	43%	43%	59%	56%	72%	75%	79%	72%	72%	69%
Video assistant referee (VAR)	41%	43%	48%	44%	43%	48%	56%	52%	55%	54%	53%	52%	67%	59%	74%	76%	83%	76%	80%	77%
Sample Sizes	*2138*	*2051*	*2007*	*2039*	*2001*	*2046*	*1972*	*2043*	*2010*	*2046*	*2008*	*2036*	*1861*	*2043*	*2033*	*2209*	*1045*	*1028*	*1007*	*1048*

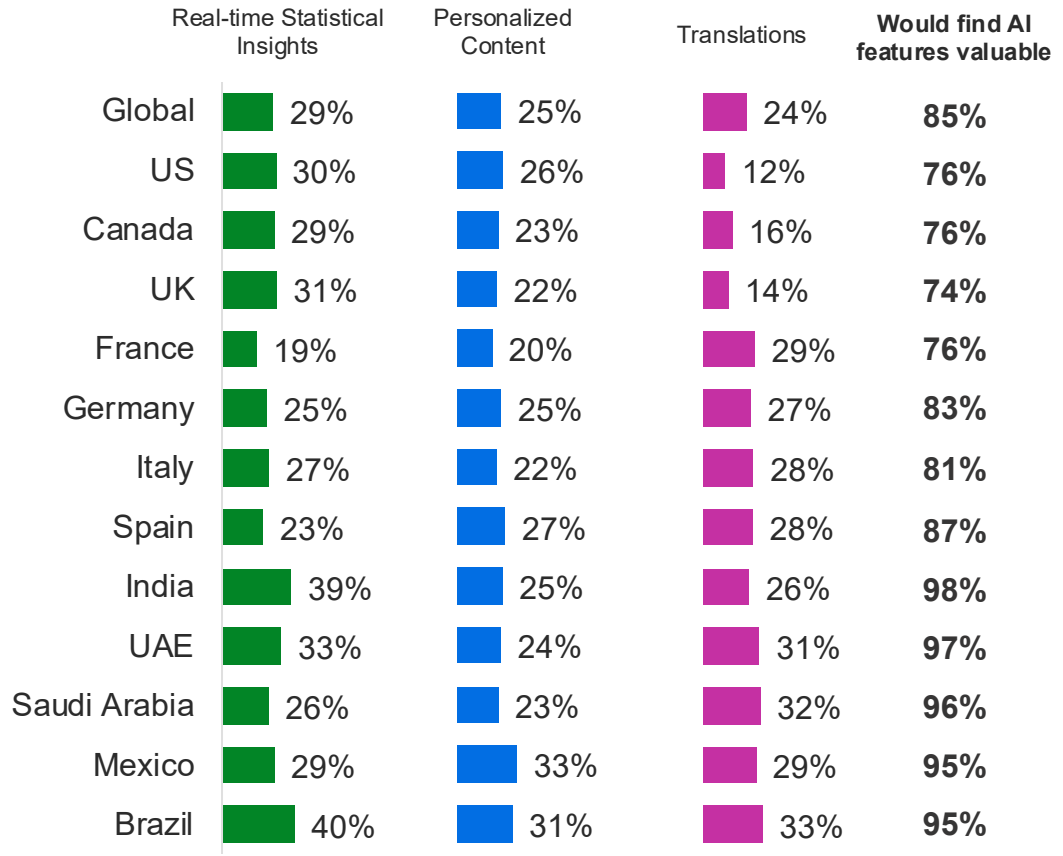
= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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

Real-time stat AI features would be most valuable to fans in Canada, the UK, India, and Brazil, while AI translations would add the most value to the sports viewing experience for fans in France, Italy, and Saudi Arabia

Top 3 Most Valuable AI Features for Sports Engagement

% selected (select up to 3), Among all sports fans



Sports fans ages 18-29 are most likely find AI features valuable (Ages: 18-29 = 94%, 30-44 = 91%, 45-54 = 86%, 55+ = 69%)

Most Valuable AI Feature for Sports Engagement

Top response, Among all sports fans

Age Groups	18-29	30-44	45-54	55+
Global	**Stats – 29%**	**Stats – 31%**	**Stats – 31%**	**Stats** – 25%**
US	Personal	Personal	Stats	Stats**
Canada	Stats	Stats	Stats	Stats**
UK	Stats	Stats	Stats	Stats**
France	Translations	Translations	Historical	Translations
Germany	Personal	Personal	Translations	Translations* Stats**
Italy	Translations	Translations	Translations	Historical
Spain	Personal	Personal	Highlights	Highlights
India	Stats	Stats	Stats	Stats
UAE	Translations	Highlights* View	Commentary	Stats
Saudi Arabia	Translations	Translations	Translations	Highlights
Mexico	Personal	Personal	Highlights	Historical
Brazil	Stats	Stats	Stats	Stats

*Tied for top 1
**A higher percentage of respondents said they wouldn't find any feature valuable

Stats
= Real-time statistical insights/predictions during games

Personal
= Personalized content

Translations
= Translations

Highlights
= AI-generated highlight reels personalized to your interests

View
= Unique ways to view

Historical
=Historical insights & comparisons

Commentary
= AI commentary with unique analysis

IBM31 Which of the following AI features would you find most valuable in your sports viewing or app experience? Select up to three.
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

When it comes to digital sports experience enhancements, 65% would like personalization capabilities and 57% want more immersive ways to view the event

Most Desired Improvements to Digital Sports Experiences

% strongly + somewhat agree, Among all sports fans

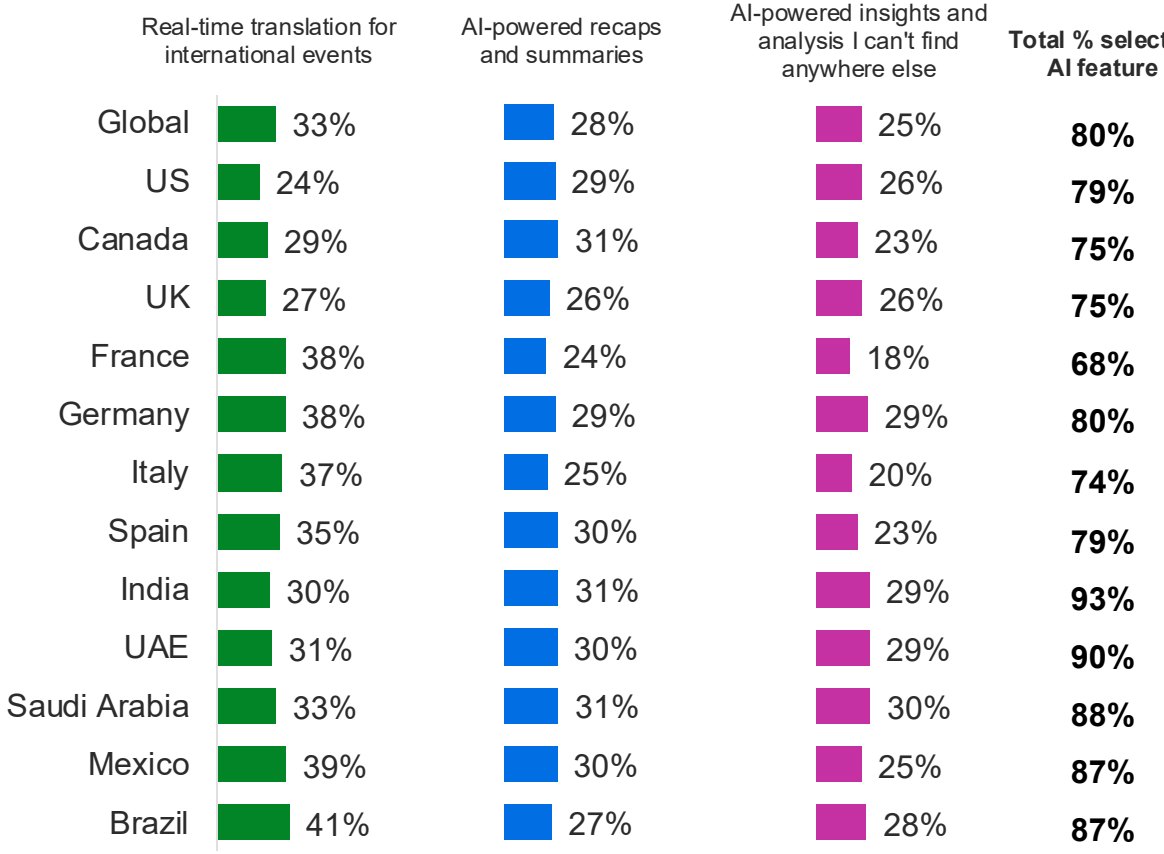
	Faster Recaps	Access to Players & Teams	Personalized Capabilities	More Immersive	AI-Powered Insights	Community Engagement	Gaming Integration
Global	67%	65%	65%	57%	56%	53%	52%
US	60%	61%	61%	49%	48%	47%	44%
Canada	58%	56%	56%	43%	43%	42%	37%
UK	58%	56%	56%	45%	45%	42%	36%
France	58%	48%	52%	45%	42%	38%	34%
Germany	68%	57%	56%	49%	51%	41%	46%
Italy	58%	52%	54%	46%	44%	37%	43%
Spain	66%	63%	65%	56%	57%	52%	47%
India	83%	85%	83%	80%	81%	79%	77%
UAE	82%	83%	83%	79%	76%	76%	74%
Saudi Arabia	83%	83%	81%	78%	74%	79%	75%
Mexico	77%	80%	78%	71%	69%	66%	70%
Brazil	85%	82%	78%	73%	74%	69%	79%
Full Statements:	Faster recaps of events	More access to my favorite players and teams	Personalization capabilities (e.g., follow just the teams or players I care about)	More immersive ways to view the event (e.g., VR experiences)	AI-powered insights and commentary for past, current and future events	Community engagement (e.g., interactive polls and fan messages)	Gaming integrations

IBM32 How much do you agree or disagree with the following statements about enhancements/improvements to digital sports experiences (e.g., apps, platforms)? I would like...
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

Real-time translation features are expected to have the most significant impact on sports by 2027, especially in markets where English is not the dominant language

Top 3 Technology Features Expected to Enhance Sports Viewing in the Next 2-3 Years

% selected (select up to 3), Among all sports fans



Top Technology Feature Expected to Enhance Sports Viewing in the Next 2-3 Years

Top response, Among all sports fans

Age Groups	18-29	30-44	45-54	55+
Global	**Translations – 32%**	**Translations – 32%**	**Translations – 34%**	**Translations – 35%**
US	AI Personal.	AI Insight	AI Recap	AI Recap
Canada	Translations	AI Predict.	AI Recap	AI Recap
UK	AI Insight	VR	VR	Translations
France	Translations	Translations	Translations	Translations
Germany	Translations	Translations	Translations	Translations
Italy	Translations	Translations	Translations	Translations
Spain	Translations	Translations	Translations	Translations
India	AI Predict.	AI Companion	AI Personal.	AI Recap
UAE	AI Personal.	AI Personal.	Translations	AI Recap
Saudi Arabia	AI Personal.	Social	AI Recap	Insight
Mexico	Translations	Translations	Translations	Translations
Brazil	Translations	Translations	Translations	Translations

Translations
= Real-time translation for international events

AI Recap
= AI-powered recaps and summaries

AI Insight
= AI generated insights & analysis

AI Personal
= AI powered personalized content

AI Predict
= AI powered predictions

VR
= Fully immersive VR experience

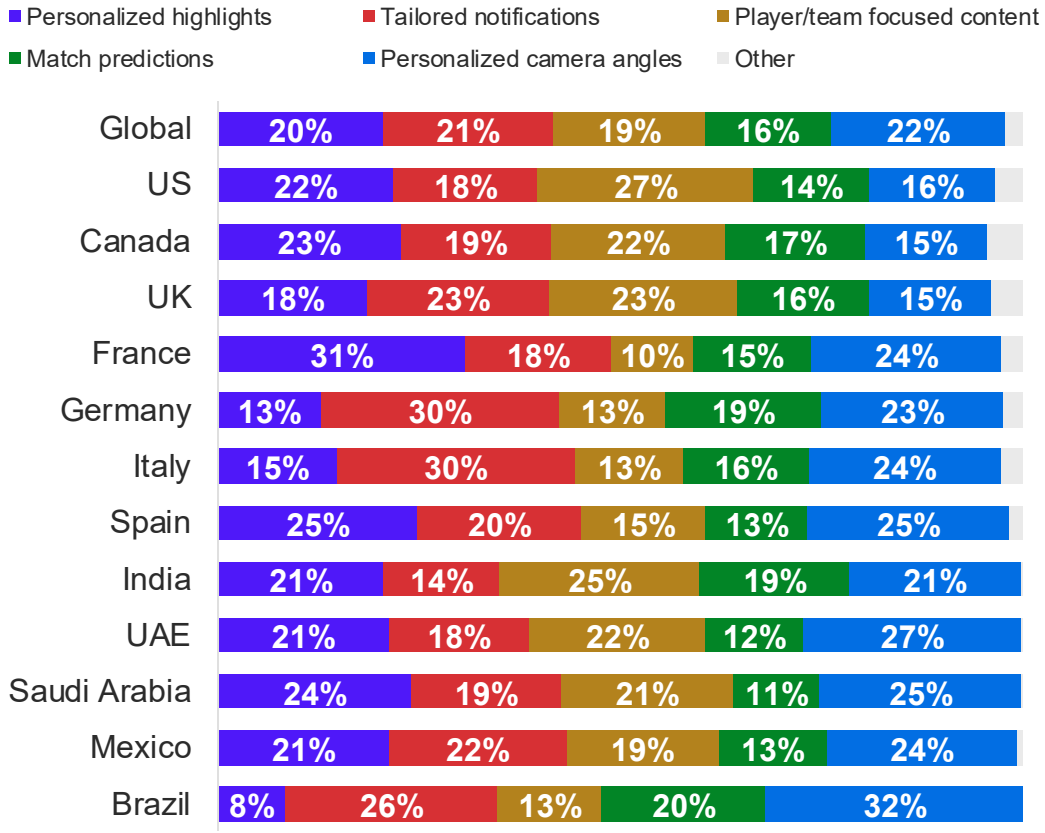
AI Companion
=AI sport companion

Social
= Integrated social viewing

IBM33 Which of the following technology-powered features do you believe will most significantly enhance your sports viewing experience in the next 2-3 years? Select up to 3.
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

Globally, sports fans are split on the most valuable personalization enhancements; Player or team-focused content is preferred in the US and UK, while tailored notifications are most valued in Germany and Italy

Most Valuable Types of Personalization in Sports Experiences
Among all sports fans



Most Valuable Types of Personalization in Sports Experiences
Top response, Among all sports fans

Age Groups	18-29	30-44	45-54	55+
Global	**Camera – 22%**	**Camera – 23%**	**Camera – 23%**	**Notifications – 26%**
US	Content	Content	Content	Content
Canada	Pred.	Content	Highlights	Notifications
UK	Content	Content	Content	Notifications
France	Camera	Camera	Highlights	Highlights
Germany	Camera	Notifications	Notifications	Notifications
Italy	Camera	Notifications	Notifications	Notifications
Spain	Camera	Camera	Highlights	Highlights
India	Content	Content	Camera	Highlights
UAE	Camera	Camera	Camera	Notifications
Saudi Arabia	Camera	Highlights	Highlights* Content	Camera
Mexico	Content	Camera	Highlights	Notifications
Brazil	Camera	Camera	Camera	Camera

*Tied for top 1

Camera
= Personalized camera or AR views

Notifications
= Tailored notifications

Content
= Player/team focused content feeds

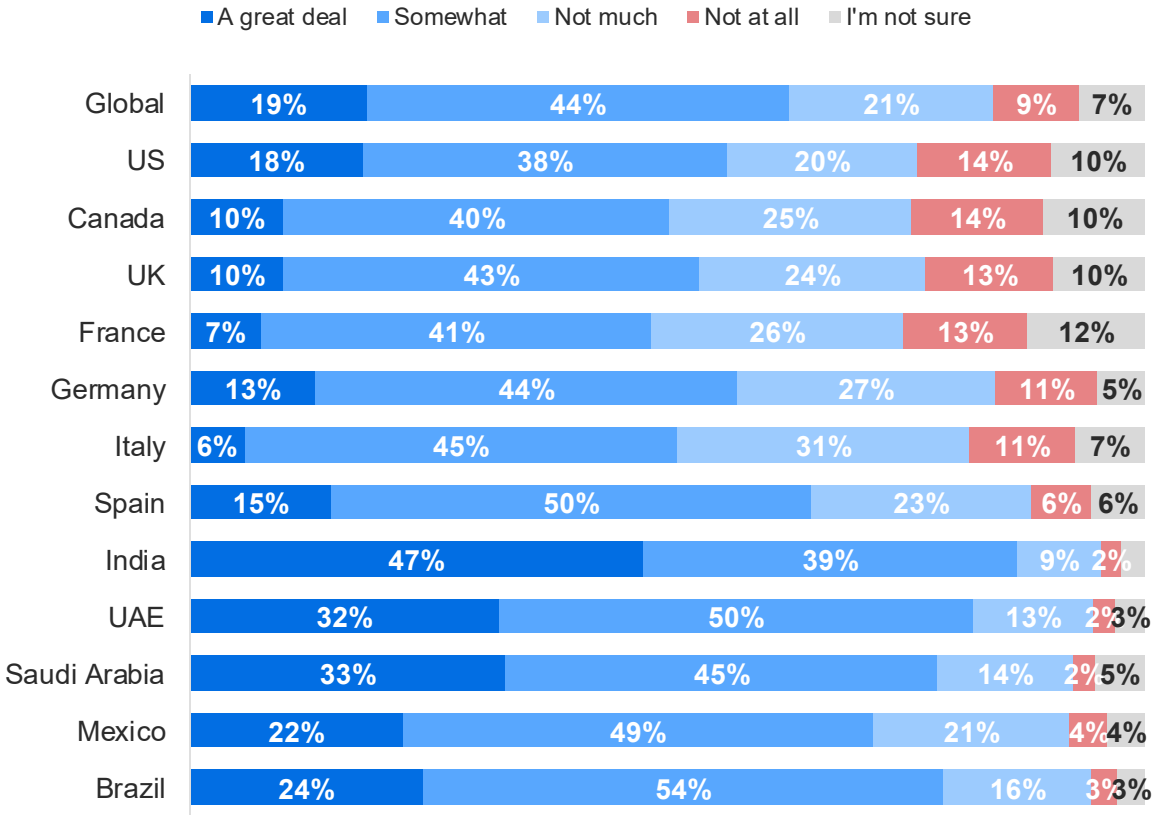
Pred.
= Match predictions

Highlights
= Personalized highlight reels

IBM34 Which types of personalization do you find most valuable in your sports experience? Select one.
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

Trust in AI for sports is also high, with 63% of fans indicating trust in AI-generated sports content; Trust in AI-generated sports content is highest in Asian and Latin American markets

Trust in AI-Generated Sports Content
Among all sports fans



Trust in AI-Generated Sports Content
% a great deal, Among all sports fans

Age Groups	18-29	30-44	45-54	55+
Global	**23%**	**23%**	**19%**	**9%**
US	26%	24%	21%	9%
Canada	16%	11%	10%	5%
UK	13%	15%	11%	4%
France	12%	11%	7%	4%
Germany	17%	16%	12%	9%
Italy	9%	4%	8%	5%
Spain	15%	17%	16%	12%
India	40%	51%	55%	47%
UAE	27%	34%	30%	42%
Saudi Arabia	31%	35%	29%	39%
Mexico	21%	22%	25%	24%
Brazil	27%	24%	22%	26%

IBM35 How much do you trust AI-generated content (e.g., match commentary, player insights) when watching sports?
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

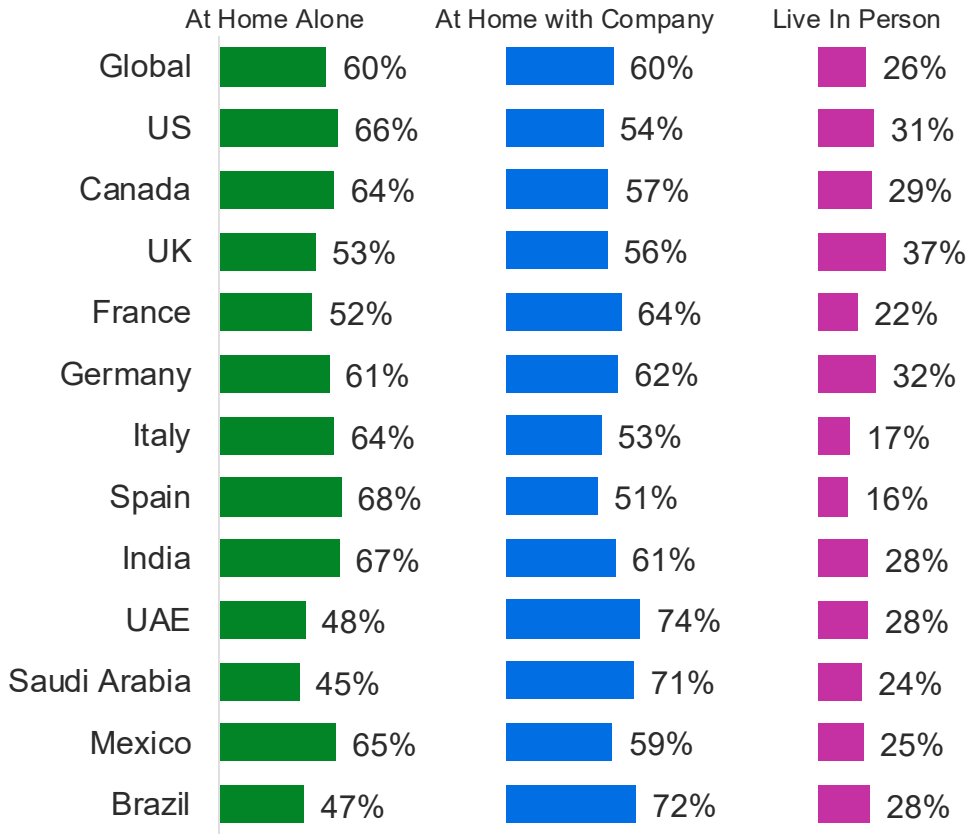
SECTION 3

Sports Viewing Habits

Sports fans are most likely to prefer watching live events at home, either on their own or with others

Top 3 Most Preferred Places to Watch Live Sporting Events

% selected, Among those who watch



Most Preferred Place to Wacht Live Sporting Events

Top response, Among those who watch

Age Groups	18-29	30-44	45-54	55+
Global	**Home+ – 61%**	**Home+ – 61%**	**Home+ – 62%**	**Home – 66%**
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+
Mexico	Home	Home	Home	Home
Brazil	Home+	Home+	Home+	Home+

Home = At home alone

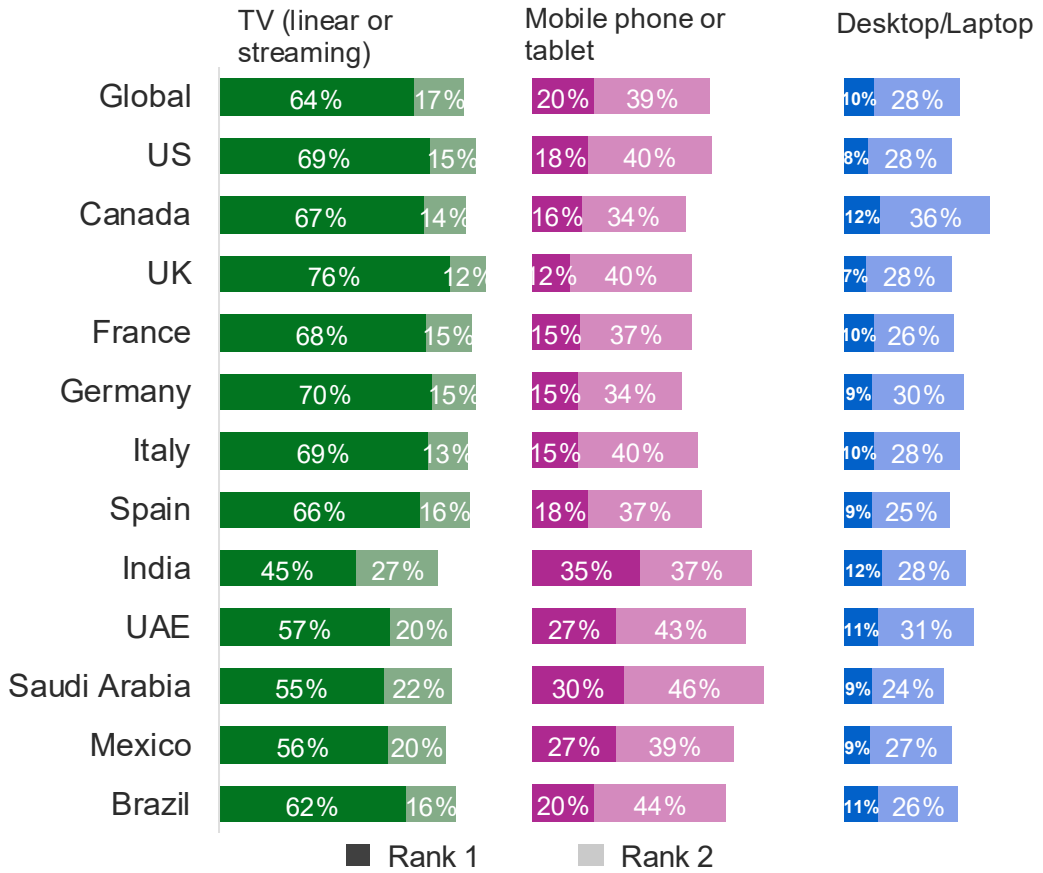
Home+ = At home with company

IBM3a Where do you most prefer to watch live sporting events? Please select up to three of your top choices.
Sample Sizes: Global = 19964n, US = 1899n, Canada = 1958n, UK = 1969n, France = 1937n, Germany = 1966n, Italy = 1980n, Spain = 1925n, India = 2136n, UAE = 1005n, Saudi Arabia = 999n, Mexico = 1172n, Brazil = 1018n

TV remains the primary device for sporting event consumption, followed by mobile devices

Ranking of Top 2 Devices Used to Watch Sports

Among those who watch live sporting events or summaries/highlights



Ranked Mobile Phone/Tablet as Top Device

% ranked 1, Among those who watch live sporting events or summaries/highlights

Age Groups	18-29	30-44	45-54	55+
Global	**33%**	**23%**	**16%**	**9%**
US	31%	23%	19%	9%
Canada	29%	20%	14%	7%
UK	23%	16%	10%	5%
France	29%	19%	10%	10%
Germany	29%	17%	11%	6%
Italy	28%	17%	15%	10%
Spain	33%	22%	17%	10%
India	44%	32%	28%	28%
UAE	35%	28%	19%	21%
Saudi Arabia	37%	30%	18%	23%
Mexico	36%	28%	23%	13%
Brazil	27%	20%	19%	12%

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.
Global = 20556n, US = 1986n, Canada = 2017n, UK = 2031n, France = 1973n, Germany = 2024n, Italy = 2006n, Spain = 2022n, India = 2193n, UAE = 1018n, Saudi Arabia = 1033n, Mexico = 1210n, Brazil = 1043n

In the US and India, fewer fans now choose TV as their primary sports device; mobile and desktop see directional gains in these markets

Top Device Choice for Watching Sporting Events

% ranked 1st, Among sports fans who watch live sporting events or sports summaries/highlights

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
TV (linear or streaming)	73%	69%	65%	67%	75%	76%	66%	68%	71%	70%	68%	69%	65%	66%	49%	45%	40%	57%	48%	55%
Mobile phone or tablet	16%	18%	16%	16%	13%	12%	16%	15%	15%	15%	16%	15%	20%	18%	34%	35%	33%	27%	32%	30%
Desktop/Laptop	7%	8%	14%	12%	7%	7%	11%	10%	10%	9%	10%	10%	10%	9%	10%	12%	17%	11%	14%	9%
Radio	4%	4%	5%	4%	5%	4%	7%	6%	5%	5%	6%	6%	5%	6%	6%	6%	10%	4%	6%	6%
Other	0%	1%	1%	0%	1%	1%	0%	1%	0%	0%	1%	0%	0%	1%	1%	1%	0%	0%	0%	1%
Sample Sizes	*2095*	*1986*	*1991*	*2017*	*1990*	*2031*	*1911*	*1973*	*1976*	*2024*	*1983*	*2006*	*1842*	*2022*	*2024*	*2193*	*1041*	*1018*	*1000*	*1033*

Second Choice Device for Watching Sporting Events

% ranked 2nd, Among sports fans who watch live sporting events or sports summaries/highlights

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
Mobile phone or tablet	45%	40%	34%	34%	39%	40%	37%	37%	36%	34%	39%	40%	38%	37%	39%	37%	31%	43%	39%	46%
Desktop/Laptop	25%	28%	34%	36%	30%	28%	28%	26%	26%	30%	29%	28%	28%	25%	29%	28%	30%	31%	29%	24%
Radio	15%	15%	16%	15%	19%	19%	19%	21%	25%	21%	17%	18%	18%	21%	7%	7%	14%	5%	8%	7%
TV (linear or streaming)	15%	15%	15%	14%	12%	12%	15%	15%	13%	15%	15%	13%	16%	16%	25%	27%	24%	20%	24%	22%
Other	1%	1%	1%	1%	1%	1%	1%	1%	1%	0%	1%	1%	1%	1%	0%	1%	1%	1%	0%	0%
Sample Sizes	*2095*	*1986*	*1991*	*2017*	*1990*	*2031*	*1911*	*1973*	*1976*	*2024*	*1983*	*2006*	*1842*	*2022*	*2024*	*2193*	*1041*	*1018*	*1000*	*1033*

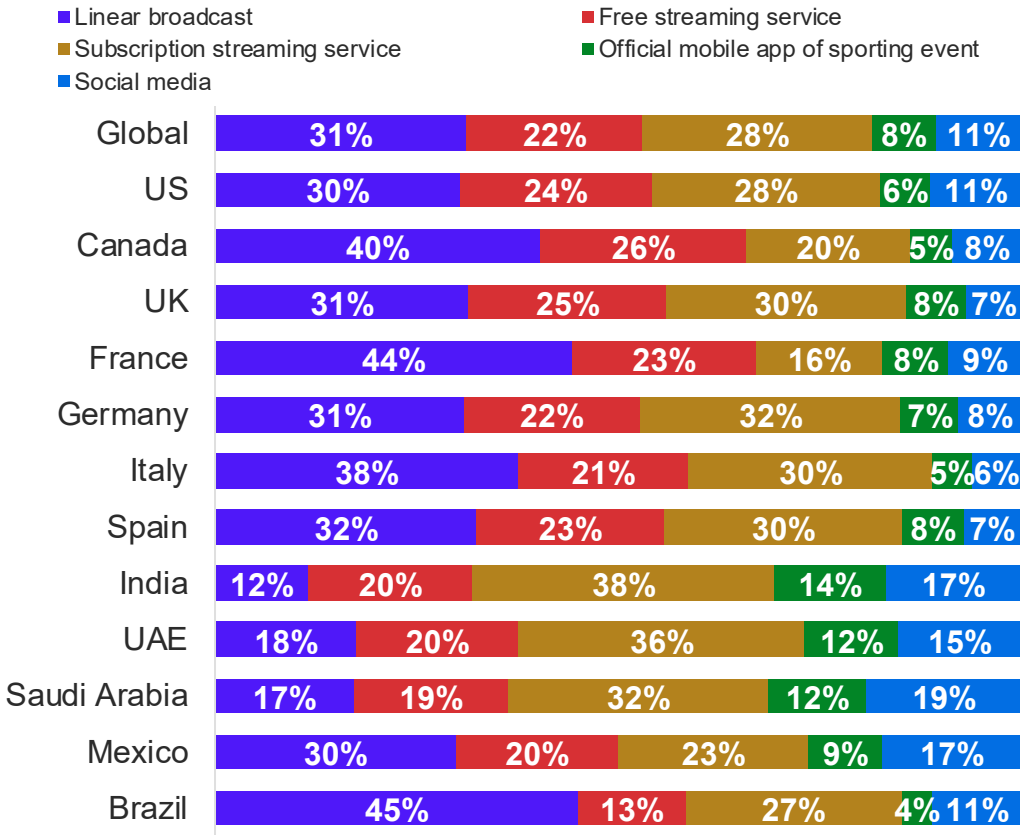
= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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.

For live sports events, fans rely on a mix of traditional and digital platforms: linear broadcasting remains the most popular option, closely followed by subscription streaming services

Most Used Platforms to Watch Live Sporting Events

Among those who watch



Top Platform Used to Watch Live Sporting Events

Top response, Among those who watch

Age Groups	18-29	30-44	45-54	55+
Global	**Sub. Streaming – 30%**	**Sub. Streaming – 33%**	**Traditional – 32%**	**Traditional – 49%**
US	Sub. Streaming	Sub. Streaming	Sub. Streaming	Traditional
Canada	Free Streaming	Traditional	Traditional	Traditional
UK	Sub. Streaming	Sub. Streaming	Traditional	Traditional
France	Free Streaming	Traditional	Traditional	Traditional
Germany	Sub. Streaming	Sub. Streaming	Traditional	Traditional
Italy	Sub. Streaming	Sub. Streaming	Sub. Streaming	Traditional
Spain	Sub. Streaming	Sub. Streaming	Traditional	Traditional
India	Sub. Streaming	Sub. Streaming	Sub. Streaming	Sub. Streaming
UAE	Sub. Streaming	Sub. Streaming	Sub. Streaming	Free Streaming
Saudi Arabia	Sub. Streaming	Sub. Streaming	Sub. Streaming	Traditional
Mexico	Traditional	Traditional	Traditional	Traditional
Brazil	Traditional	Traditional	Traditional	Traditional

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

IBM6 What platform are you most likely to use to watch a sporting event in the following formats?
Sample Sizes: Global = 19964n, US = 1899n, Canada = 1958n, UK = 1969n, France = 1937n, Germany = 1966n, Italy = 1980n, Spain = 1925n, India = 2136n, UAE = 1005n, Saudi Arabia = 999n, Mexico = 1172n, Brazil = 1018n

SPORTS VIEWING HABITS

Fewer fans watch live sports via linear broadcast in the US, UK, Germany, and India, as subscription streaming grows in the US, Canada, India, and UAE

Most Used Platforms to Watch Live Sporting Events

% selected, Among sports fans who watch live sporting events

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
Linear broadcast	36%	30%	39%	40%	35%	31%	39%	44%	34%	31%	38%	38%	30%	32%	14%	12%	13%	18%	10%	17%
Subscription streaming service	24%	28%	17%	20%	28%	30%	22%	16%	32%	32%	29%	30%	31%	30%	33%	38%	31%	36%	35%	32%
Free streaming service	25%	24%	25%	26%	24%	25%	20%	23%	20%	22%	22%	21%	23%	23%	26%	20%	22%	20%	20%	19%
Social media platforms	10%	11%	11%	8%	7%	7%	10%	9%	6%	8%	6%	6%	8%	7%	13%	17%	17%	15%	18%	19%
Official mobile app of sporting event / institution	5%	6%	7%	5%	6%	8%	9%	8%	8%	7%	4%	5%	9%	8%	14%	14%	18%	12%	17%	12%
Sample Sizes	*1969*	*1854*	*1935*	*1953*	*1941*	*1986*	*1552*	*1510*	*1951*	*1998*	*1911*	*1930*	*1811*	*1962*	*1985*	*2165*	*1026*	*995*	*971*	*1001*

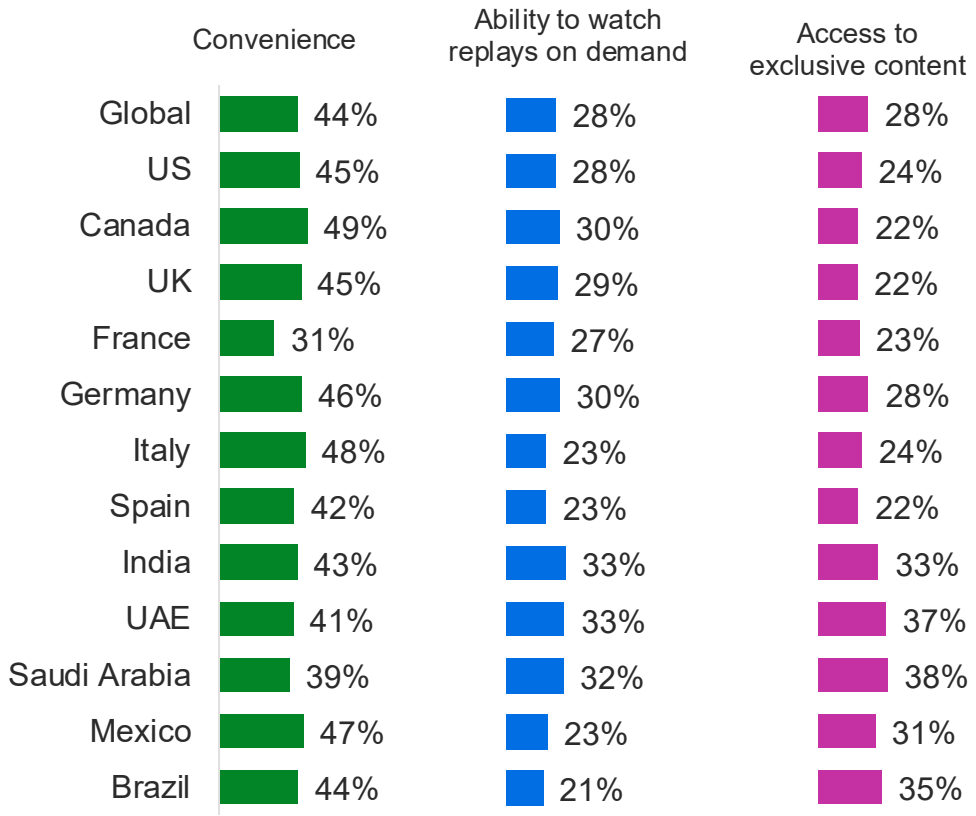
= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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

Convenience is the top reason for choosing digital over linear broadcasting across regions and age groups

Top 3 Motivations for Choosing Digital Platforms Over Linear Broadcasting When Watching Live Sporting Events

% selected, Among those who watch



Top Motivation for Choosing Digital Platforms Over Linear Broadcasting When Watching Live Sporting Events

Top response, Among those who watch

Age Groups	18-29	30-44	45-54	55+
Global	**Convenience – 41%**	**Convenience – 42%**	**Convenience – 45%**	**Convenience – 49%**
US	Convenience	Convenience	Convenience	Convenience
Canada	Convenience	Convenience	Convenience	Convenience
UK	Convenience	Convenience	Convenience	Convenience
France	Comprehensive	Convenience	Convenience	Convenience
Germany	Convenience	Convenience	Convenience	Convenience
Italy	Convenience	Convenience	Convenience	Convenience
Spain	Convenience	Convenience	Convenience	Convenience
India	Convenience	Convenience	Commentary	Convenience
UAE	Convenience	Exclusive	Convenience	Convenience
Saudi Arabia	Convenience	Exclusive	Exclusive	Convenience
Mexico	Convenience	Convenience	Convenience	Convenience
Brazil	Convenience	Convenience	Convenience	Convenience

*Tied for top response

Convenience
= Convenience – I can watch anytime, anywhere

Comprehensive
= More comprehensive content (pre-event, post event)

Exclusive
= Access to exclusive content

Commentary
= Better commentary options

IBM6a What motivates you to watch a sporting event on a digital platform/app (e.g., free/subscription streaming services, mobile app, social media platform) over linear broadcast (e.g., traditional cable) for the following formats? Select all that apply.
Sample Sizes: Global = 13749n, US = 1323n, Canada = 1169n, UK = 1350n, France = 1080n, Germany = 1360n, Italy = 1237n, Spain = 1300n, India = 1890n, UAE = 829n, Saudi Arabia = 828n, Mexico = 823n, Brazil = 560n

Fans across sports are most likely to watch their favorite events live

Global: Methods Used to Watch Favorite Sporting Events by Sport

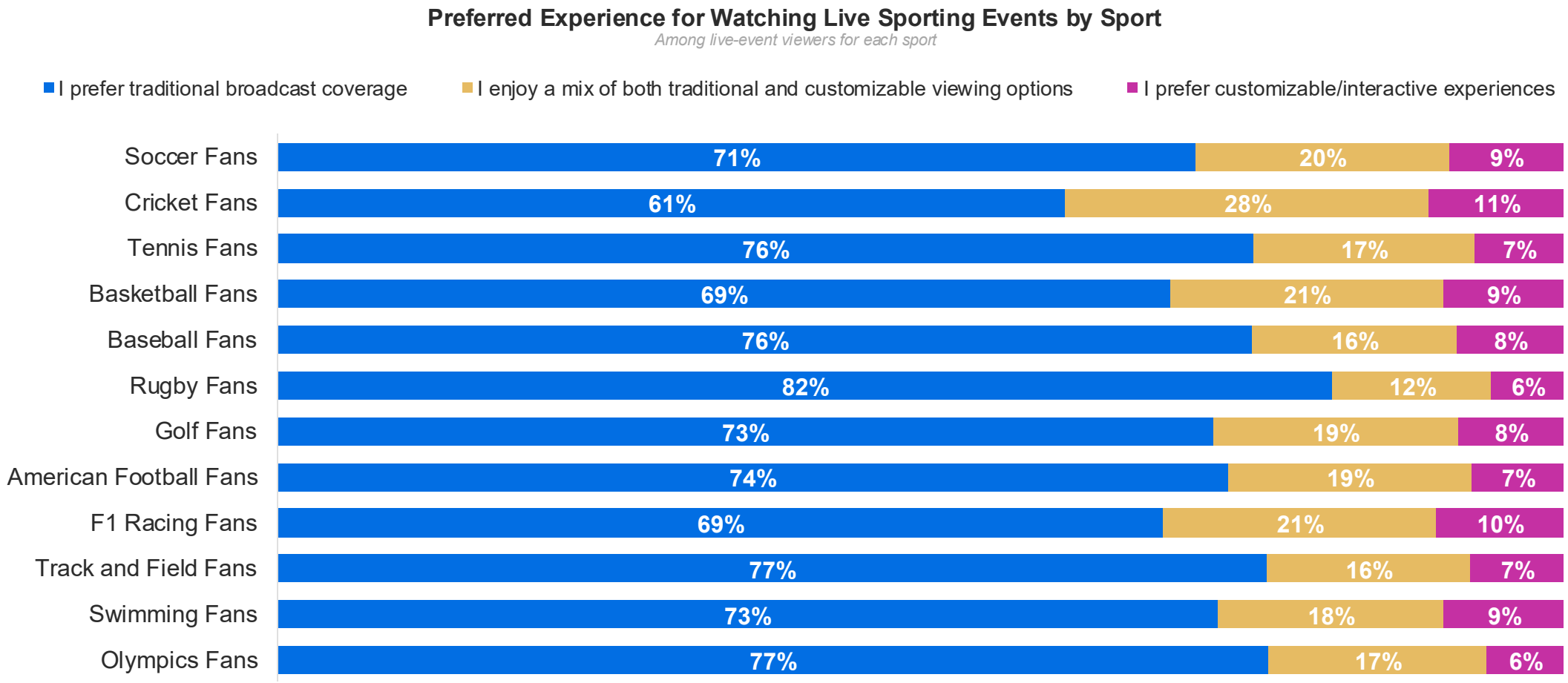
% selected, Among fans of each sport

	Live	Watching highlight clips on social media	Watching highlight clips on an official website	Full on-demand replay	On-demand clips of packaged highlights	On-demand, manually skipping to parts I am interested in	Other
Soccer Fans	70%	31%	24%	20%	20%	16%	2%
Cricket Fans	65%	44%	38%	23%	27%	23%	3%
Tennis Fans	65%	27%	22%	17%	17%	15%	2%
Basketball Fans	58%	34%	25%	20%	20%	17%	2%
Baseball Fans	60%	31%	25%	17%	18%	16%	3%
Rugby Fans	71%	20%	15%	17%	15%	14%	2%
Golf Fans	57%	28%	25%	18%	20%	18%	3%
American football Fans	65%	33%	26%	19%	19%	16%	2%
F1 racing Fans	64%	27%	22%	19%	20%	16%	2%
Track and field Fans	66%	22%	19%	16%	17%	15%	3%
Swimming Fans	51%	29%	23%	18%	19%	18%	3%
Olympics Fans	72%	25%	20%	17%	16%	16%	2%

IBM11 For the following sports, how do you typically **watch** your favorite sporting events? Please select all that apply.
Sample Sizes: Soccer = 14358n, Cricket = 3079n, Tennis = 7095n, Basketball = 6453n, Baseball = 3146n, Rugby = 2114n, Golf = 2040n, American football = 4329n, F1 racing = 6198n, Track and field = 4132n, Swimming = 4502n, Olympics = 9023n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

SPORTS VIEWING HABITS

Most live-event sports viewers still prefer traditional broadcasting, though 1-in-5 say they like a blend of classic and customizable options



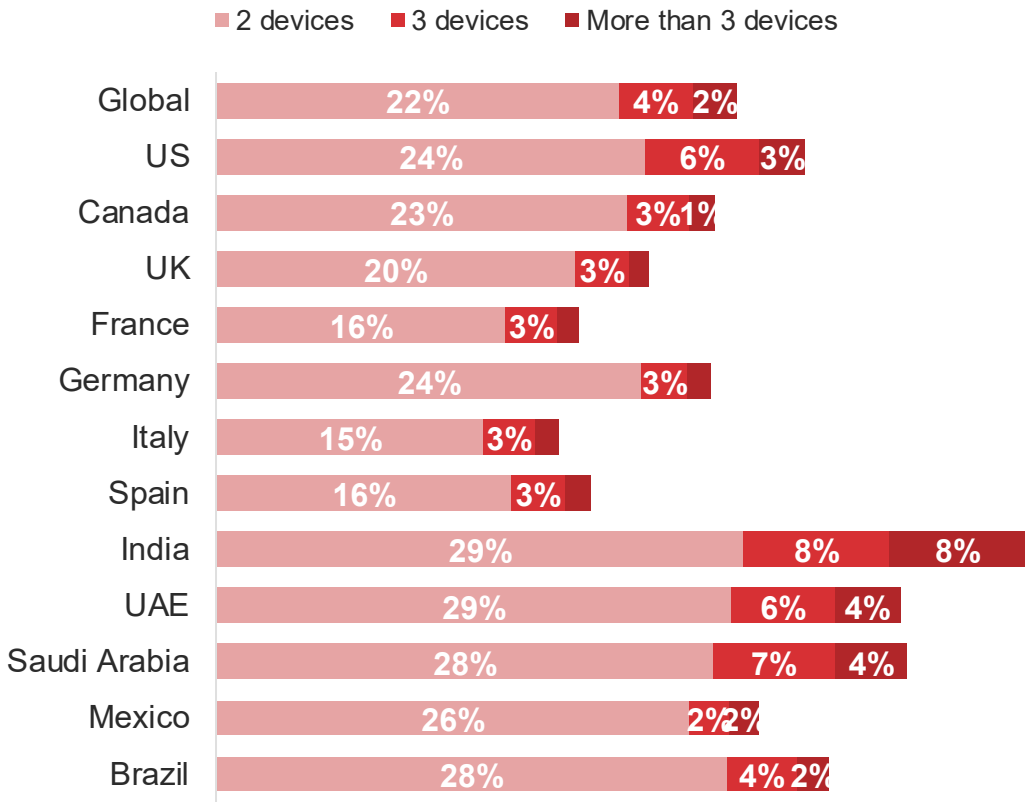
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IBM11a For the following sports, how do you prefer to experience live sporting events?
Sample Sizes: Soccer = 10116n, Cricket = 2009n, Tennis = 4601n, Basketball = 3722n, Baseball = 1891n, Rugby = 1494n, Golf = 1165n, American football = 2794n, F1 racing = 3997n, Track and field = 2739n, Swimming = 2308n, Olympics = 6540n

28% of sports fans typically use 2 or more devices when watching sporting events

Multi-Device Use While Watching Sporting Events

Among all sports fans



% Using 3 or More Devices While Watching Sporting Events

Among all sports fans

Age Groups	18-29	30-44	45-54	55+
Global	**9%**	**9%**	**6%**	**2%**
US	**17%**	15%	9%	2%
Canada	9%	7%	4%	2%
UK	8%	7%	3%	1%
France	6%	7%	5%	1%
Germany	7%	5%	3%	1%
Italy	9%	5%	5%	2%
Spain	7%	7%	4%	1%
India	13%	17%	**22%**	9%
UAE	7%	12%	6%	4%
Saudi Arabia	13%	11%	5%	11%
Mexico	7%	3%	3%	2%
Brazil	6%	7%	6%	3%

IBM14 How many devices are you typically using while watching and/or listening to a sporting event?
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

SPORTS VIEWING HABITS

Multi-device usage while watching sporting events increased in the US, Germany, India, the UAE, and Saudi Arabia

2024 vs. 2025: Multi-Device Use While Watching Sporting Events

% selected, Among all sports fans

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
NET: Uses 2 or more devices	30%	33%	31%	28%	23%	24%	24%	20%	23%	28%	19%	19%	22%	21%	38%	45%	33%	38%	32%	39%
Sample Sizes	*2138*	*2051*	*2007*	*2039*	*2001*	*2046*	*1972*	*2043*	*2010*	*2046*	*2008*	*2036*	*1861*	*2043*	*2033*	*2209*	*1045*	*1028*	*1007*	*1048*

= Significant increase between 2024 and 2025 at 95% CI

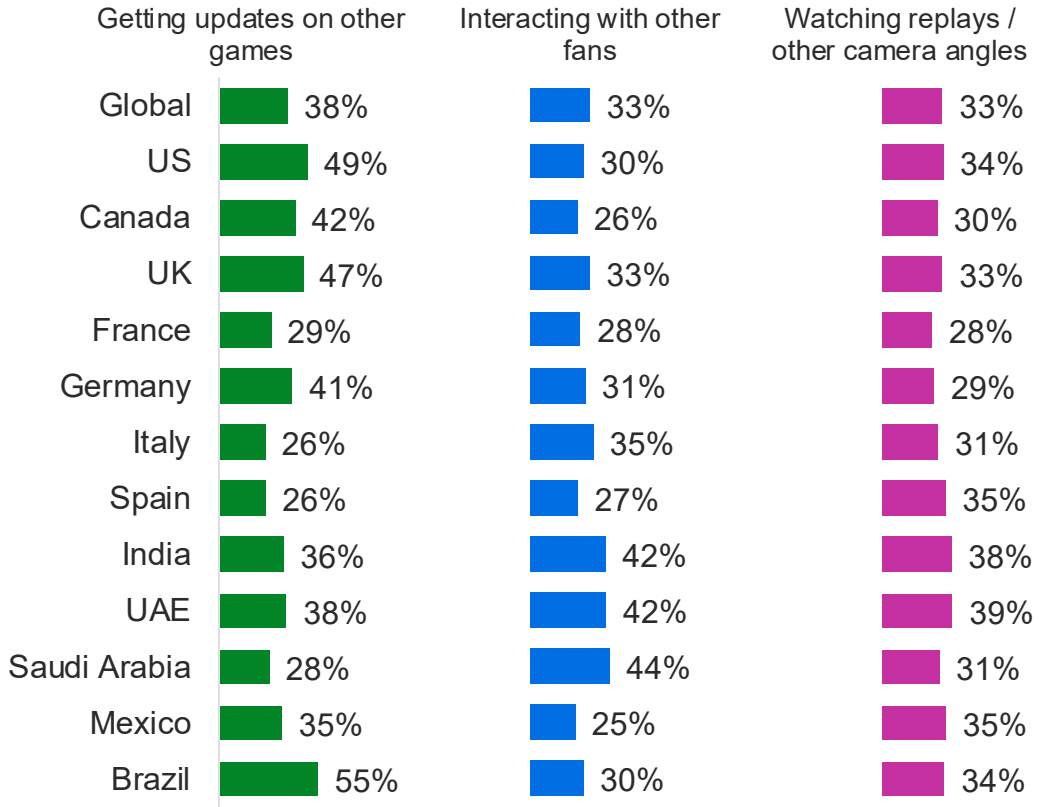
= Significant decrease between 2024 and 2025 at 95% CI

IBM14 How many devices are you typically using while watching and/or listening to a sporting event?

The top reason sports fans use two or more devices while consuming sporting events is to get updates on other games, followed by interacting with other fans and watching replays or other camera angles

Top 3 Reasons for Using Multiple Devices When Consuming Sporting Events

% selected (select up to 3), Among those who use 2 or more devices when watching sporting events



Top Reason for Using Multiple Devices When Consuming Sporting Events

Top response, Among those who use 2 or more devices when watching sporting events

Age Groups	18-29	30-44	45-54	55+
Global	**Fan Interaction – 37%**	**Other Games – 39%**	**Other Games – 41%**	**Other Games – 40%**
US	Other Games	Other Games	Other Games	Other Games
Canada	Other Games	Other Games	Other Games	Non-Sports
UK	Other Games	Other Games	Other Games	Other Games
France	Non-Sports	Other Games	Non-Sports	Non-Sports
Germany	Other Games	Other Games	Other Games	Non-Sports
Italy	Fan Interaction	Fan Interaction	Fan Interaction	Replays/Angles
Spain	Fan Interaction	Replays/Angles	Extra Analysis	Extra Analysis
India	Stats	Fan Interaction	Fan Interaction	Other Games
UAE	Extra Analysis	Fan Interaction	Replays/Angles	*N size too small to show*
Saudi Arabia	Fan Interaction	Extra Analysis	Extra Analysis	*N size too small to show*
Mexico	Replays/Angles	Replays/Angles	Other Games* Extra Analysis	Stats
Brazil	Other Games	Other Games	Other Games	Other Games

*Tied for top response

Other Games
= Getting updates on other games

Fan Interaction
= Interacting with other fans through social media or apps

Replays/Angles
= Watching replays / other camera angles Commentary

Stats
= Getting player/team statistics and performance metrics

Extra Analysis
= Accessing real-time analysis or commentary not available on broadcast

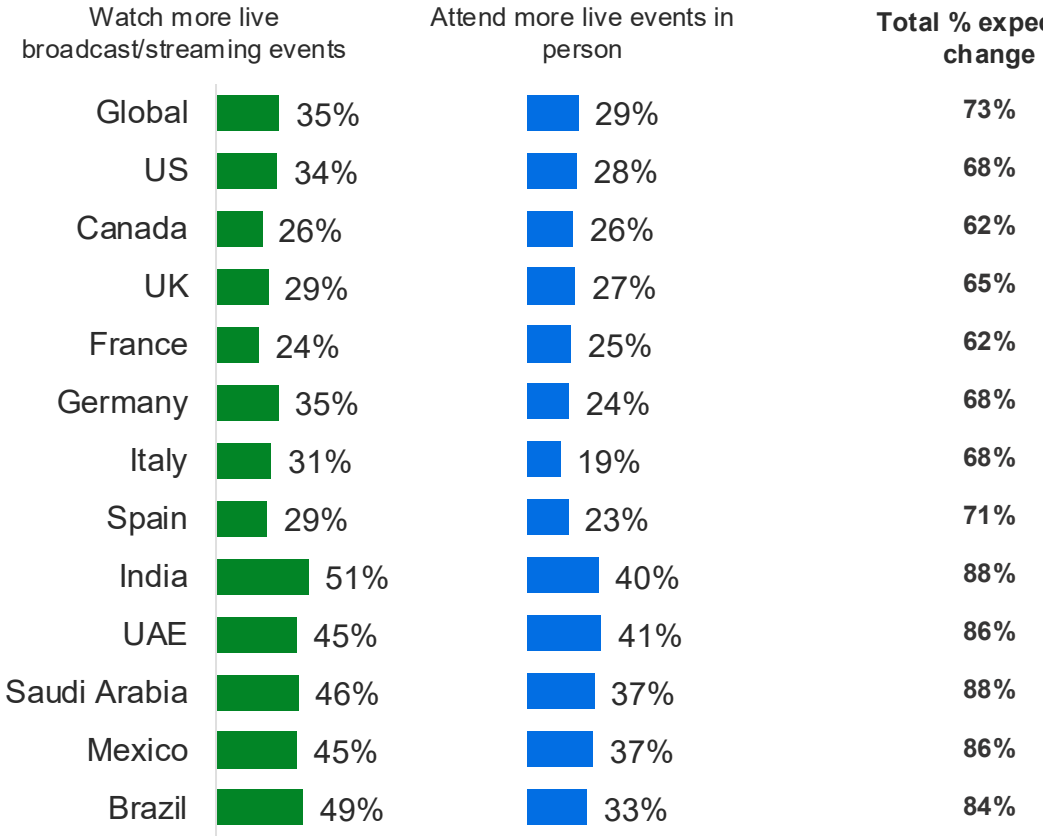
Non-Sports
= I use my other device(s) for non-sports related reasons/multi-tasking

IBM14a When using other devices (phone, tablet, laptop) while watching and/or listening to a sporting event, what are your primary reasons for using the additional device(s)? Select up to three.
Sample Sizes: Global = 6047n, US = 674n, Canada = 566n, UK = 493n, France = 412n, Germany = 565n, Italy = 389n, Spain = 427n, India = 996n, UAE = 392n, Saudi Arabia = 404n, Mexico = 371n, Brazil = 358n

Only a quarter of sports fans think their sports viewing habits will stay the same, signaling an opportunity for innovation in how sports are delivered and experienced

Top 2 Anticipated Changes in Sports Viewing Habits by 2027

% selected, Among all sports fans



Top Anticipated Change in Sports Viewing Habits by 2027

Top response, Among those all sports fans

Younger sports fans are especially ready for change, with 86% of those 18-29 expecting their viewing habits to change by 2027 (Age: 30-44 = 82%, 45-54 = 74%, 55+ = 48%).

Age groups	18-29	30-44	45-54	55+
Global	**Attend Events – 39%**	**Watch Live – 41%**	**Watch Live – 37%**	**No Change – 48%**
US	Attend Events	Watch Live	Watch Live	No Change
Canada	Attend Events	Attend Events	No Change	No Change
UK	Attend Events	Watch Live	No Change	No Change
France	Attend Events	Watch Live	No Change	No Change
Germany	Watch Live	Watch Live	Watch Live	No Change
Italy	Watch Live	Watch Live	Watch Live	No Change
Spain	Attend Events	Watch Live	No Change	No Change
India	Watch Live	Watch Live	Watch Live	Watch Live
UAE	Attend Events	Watch Live	Watch Live	Watch Live
Saudi Arabia	Watch Live	Watch Live	Watch Live	Watch Live
Mexico	Watch Live	Watch Live	Watch Live	Watch Live
Brazil	Watch Live	Watch Live	Watch Live	Watch Live

Attend Events = Attend more live events in person

Watch live = Watch more live broadcast/streaming events

No Change = I expect my sports viewing habits to stay the same

IBM26 In the next 2-3 years, how do you see your sports viewing habits changing? Select all that apply.
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

More than 7-in-10 across key fanbases expect their sports viewing habits to change in the next 2-3 years; Golf fans are more likely than other sports fans to plan on using more interactive viewing technology

Anticipated Change in Sports Viewing Habits by 2027 (Across Key Sports)

% selected, Among all sports fans

	Watch more live broadcast/streaming events	Attend more live events in person	Increase number of digital platforms I use to engage with sports	Consume more on-demand content	Use more interactive viewing tech (e.g., VR)	Total % expecting change
American Football Fans	41%	34%	26%	23%	19%	**74%**
F1 Racing Fans	41%	32%	25%	25%	19%	**76%**
Golf Fans	38%	33%	27%	27%	23%	**72%**
Tennis Fans	38%	29%	23%	24%	18%	**72%**

IBM26 In the next 2-3 years, how do you see your sports viewing habits changing? Select all that apply.
Sample Sizes: Sample Sizes: Tennis = 7095n, Golf = 2040n, American football = 4329n, F1 racing = 6198n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

Appendix

Despite year-over-year decreases in six markets, engagement with additional content consumption remains high across markets

Drops in engagement in the US, Canada, the UK, France, and Spain are largely driven by sports fans ages 55+.

Sports fans ages 18-29 in the UAE are less likely to be consuming additional sports content in 2025 compared to 2024 (99% to 95%).

2024 vs. 2025: Engagement With Additional Sports Content

Total engaging with additional sports content, Among all sports fans

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
% engaging with additional content	92%	88%	91%	88%	92%	90%	84%	80%	92%	92%	86%	84%	93%	90%	98%	98%	99%	96%	97%	96%
Sample Sizes	*2138*	*2051*	*2007*	*2039*	*2001*	*2046*	*1972*	*2043*	*2010*	*2046*	*2008*	*2036*	*1861*	*2043*	*2033*	*2209*	*1045*	*1028*	*1007*	*1048*

= Significant increase between 2024 and 2025 at 95% CI

= Significant decrease between 2024 and 2025 at 95% CI

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

Video highlights are the most popular form of extra content across nearly all sports fanbases; Fans are also highly engaged with news coverage and articles

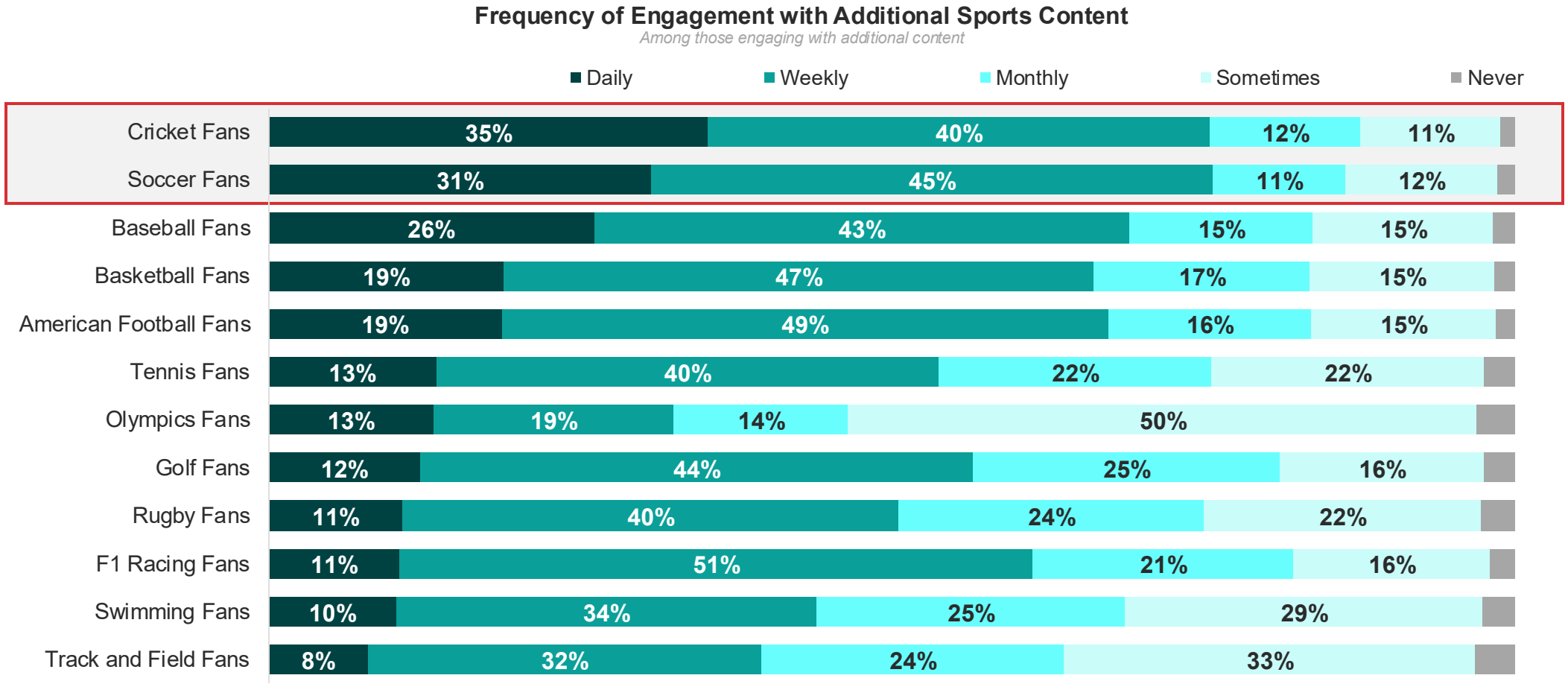
Engagement with Additional Sports Content

% selected, Among fans of specific sports

	Video Highlights	News coverage	News articles	Social media posts	Team/league websites	Mobile sports apps	Blogs/fan websites	Fan forums or discussion boards	Podcasts	Other	None of the above	Total consuming additional content
Soccer Fans	40%	37%	33%	32%	27%	26%	14%	15%	16%	2%	10%	**90%**
Cricket Fans	51%	40%	39%	47%	28%	39%	23%	20%	24%	2%	5%	**95%**
Tennis Fans	36%	35%	31%	24%	15%	18%	11%	11%	12%	2%	12%	**88%**
Basketball Fans	41%	34%	28%	30%	23%	24%	14%	14%	16%	2%	9%	**91%**
Baseball Fans	40%	36%	26%	29%	24%	23%	11%	13%	15%	2%	11%	**89%**
Rugby Fans	26%	37%	30%	20%	18%	15%	10%	10%	10%	1%	17%	**83%**
Golf Fans	39%	38%	30%	24%	17%	19%	13%	13%	15%	1%	11%	**89%**
American Football Fans	43%	39%	28%	33%	25%	24%	15%	13%	17%	2%	9%	**91%**
F1 racing Fans	40%	37%	32%	27%	18%	20%	13%	14%	13%	1%	10%	**90%**
Track and field Fans	32%	38%	30%	19%	13%	14%	9%	9%	10%	2%	15%	**85%**
Swimming Fans	33%	34%	27%	24%	15%	18%	12%	10%	14%	2%	12%	**88%**
Olympics Fans	38%	43%	33%	24%	14%	16%	9%	10%	11%	2%	13%	**87%**

IBM17 Beyond watching individual sports, do you engage with any of the following additional content around your favorite spots, teams, players, etc.? Please select all that apply.
Sample Sizes: Soccer = 14358n, Cricket = 3079n, Tennis = 7095n, Basketball = 6453n, Baseball = 3146n, Rugby = 2114n, Golf = 2040n, American football = 4329n, F1 racing = 6198n, Track and field = 4132n, Swimming = 4502n, Olympics = 9023n

Cricket and soccer content are engaged with the most frequently among their fan bases

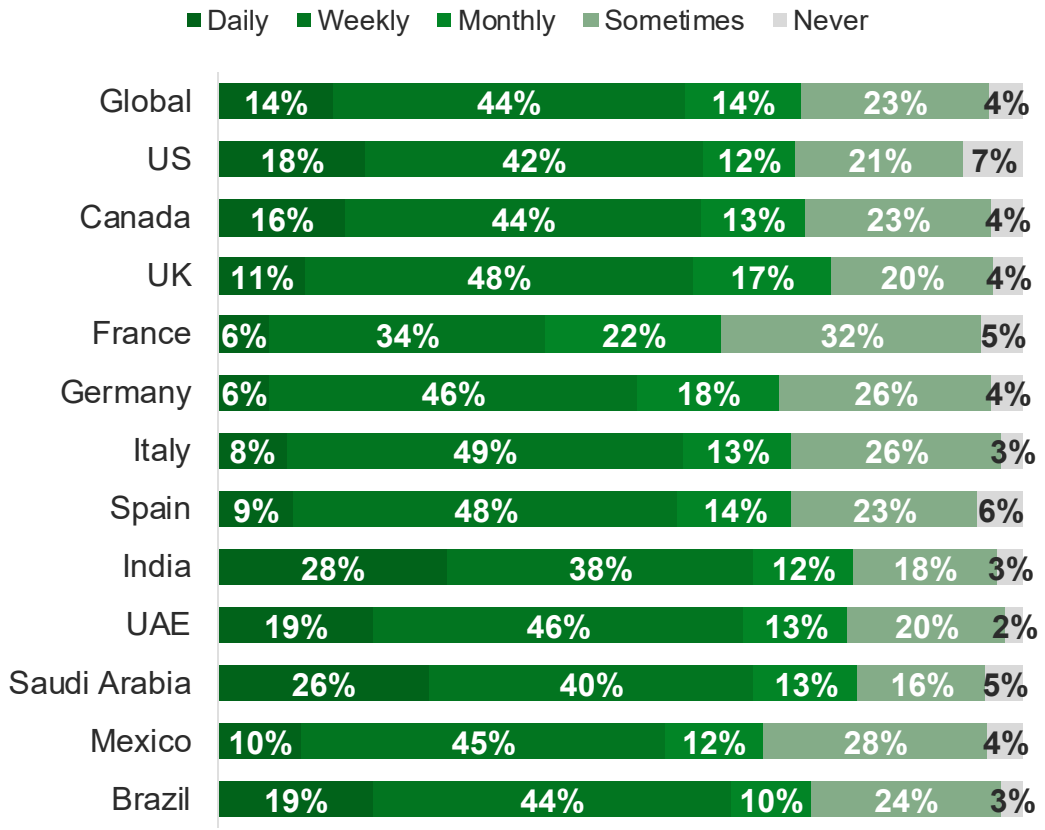


IBM18 How often do you engage with additional content for each of the following sports?
Sample Sizes: Soccer = 12987n, Cricket = 2934n, Tennis = 6213n, Basketball = 5892n, Baseball = 2811n, Rugby = 1761n, Golf = 1824n, American football = 3923n, F1 racing = 5584n, Track and field = 3528n, Swimming = 3940n, Olympics = 7822n

58% of sports fans watch live sporting events on a weekly basis

Frequency of Watching Live Sporting Events

Among all sports fans



Frequent Live Sporting Event Watchers

% weekly+, Among all sports fans

Age groups	18-29	30-44	45-54	55+
Global	**58%**	**61%**	**57%**	**55%**
US	62%	61%	59%	59%
Canada	57%	56%	62%	64%
UK	62%	65%	53%	56%
France	46%	46%	37%	37%
Germany	51%	53%	52%	52%
Italy	54%	59%	56%	59%
Spain	57%	57%	58%	57%
India	65%	67%	68%	64%
UAE	57%	70%	57%	74%
Saudi Arabia	68%	70%	59%	57%
Mexico	47%	58%	60%	60%
Brazil	62%	67%	65%	56%

IBM2 How often do you watch sporting events in the following formats?
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

APPENDIX: SPORTS VIEWING HABITS

Daily live sports viewing has remained largely unchanged across most markets

Frequency of Watching Live Sporting Events

% selected, Among all sports fans

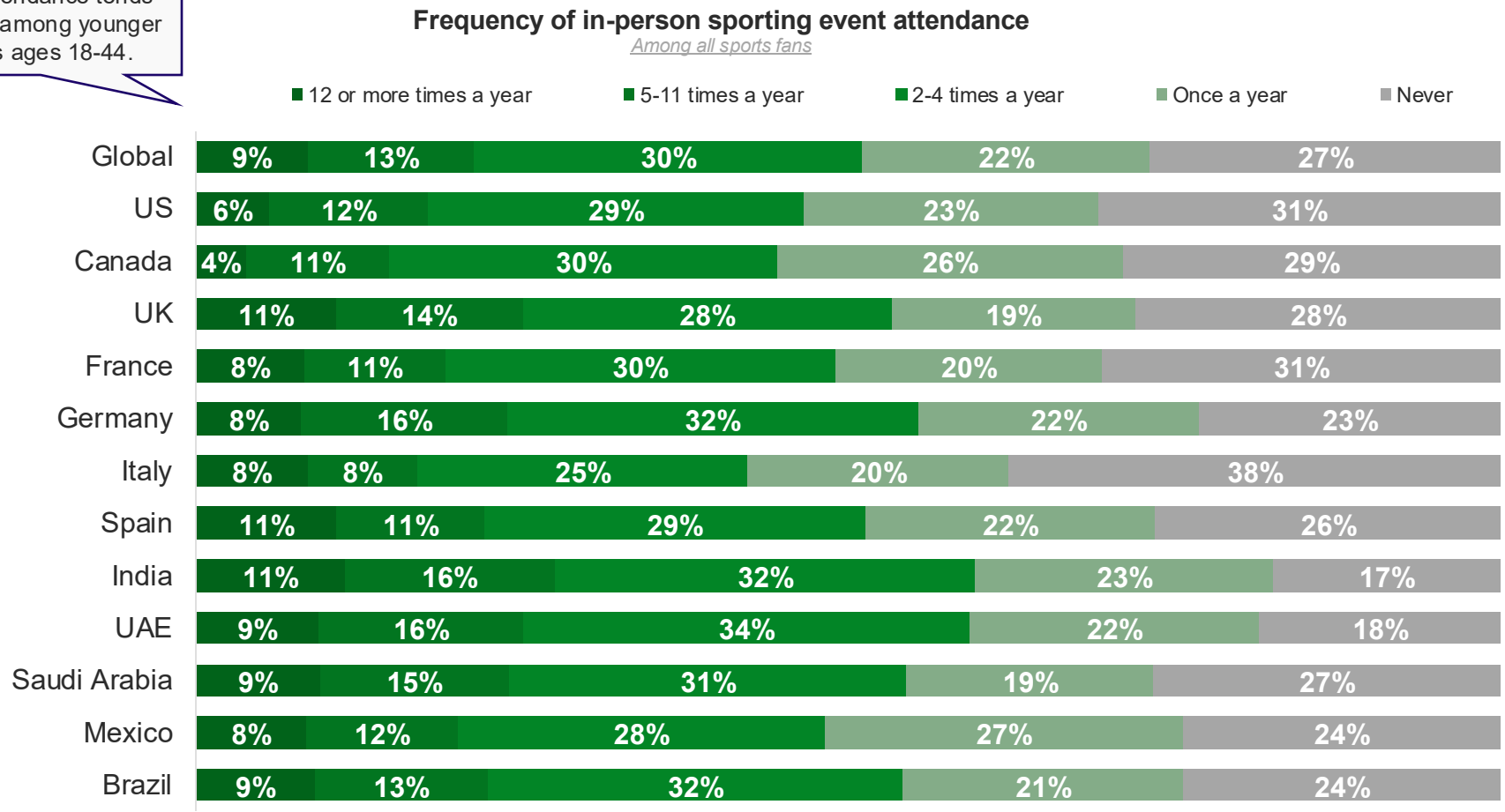
	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
Daily	17%	18%	22%	16%	10%	11%	8%	6%	7%	6%	8%	8%	10%	9%	27%	28%	23%	19%	25%	26%
Weekly	45%	42%	41%	44%	49%	48%	38%	34%	47%	46%	50%	49%	50%	48%	36%	38%	40%	46%	44%	40%
Monthly	12%	12%	11%	13%	16%	17%	21%	22%	16%	18%	14%	13%	14%	14%	12%	12%	7%	13%	12%	13%
Sometimes	20%	21%	22%	23%	22%	20%	28%	32%	25%	26%	25%	26%	23%	23%	22%	18%	28%	20%	16%	16%
Never	6%	7%	4%	4%	3%	4%	4%	5%	5%	4%	3%	3%	4%	6%	3%	3%	2%	2%	2%	5%
Sample Sizes	*2138*	*2051*	*2007*	*2039*	*2001*	*2046*	*1972*	*2043*	*2010*	*2046*	*2008*	*2036*	*1861*	*2043*	*2033*	*2209*	*1045*	*1028*	*1007*	*1048*

= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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

73% of sports fans globally go to at least one sporting event a year

In-person attendance tends to be highest among younger sports fans ages 18-44.



IBM1 In a typical year, how often do you attend sporting events in-person?
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

While soccer remains a globally enjoyed sport, most other sports fandoms vary drastically by market

Sport Fanbases Across Markets

% selected, Among all sports fans

	Soccer	Olympics	Tennis	Basketball	F1 racing	Swimming	American Football	Track and field	Baseball	Cricket	Rugby	Golf
Global	69%	43%	34%	31%	30%	22%	21%	20%	15%	15%	10%	10%
US	22%	39%	19%	61%	13%	15%	79%	14%	57%	2%	3%	21%
CANADA	38%	54%	24%	45%	17%	16%	42%	12%	43%	5%	5%	21%
UK	84%	43%	42%	14%	36%	19%	11%	23%	5%	28%	30%	20%
FRANCE	65%	53%	45%	19%	23%	26%	4%	30%	2%	0%	40%	4%
GERMANY	83%	47%	29%	24%	36%	27%	17%	30%	6%	1%	3%	7%
ITALY	79%	52%	52%	19%	44%	29%	3%	33%	2%	0%	8%	3%
SPAIN	84%	44%	55%	41%	46%	20%	4%	23%	4%	0%	5%	5%
INDIA	60%	33%	37%	22%	22%	16%	14%	8%	10%	91%	4%	7%
UAE	79%	29%	31%	41%	33%	32%	15%	18%	8%	24%	5%	10%
SAUDI ARABIA	93%	15%	18%	23%	24%	21%	6%	13%	3%	4%	1%	5%
MEXICO	83%	36%	13%	31%	26%	16%	33%	3%	28%	0%	2%	5%
BRAZIL	89%	57%	19%	35%	38%	28%	12%	20%	4%	0%	2%	3%

IBMdem3 What sports, if any, do you typically follow? Select all that apply.
Sample Sizes: Global = 20864n, US = 2051n, Canada = 2039n, UK = 2046n, France = 2043n, Germany = 2046n, Italy = 2036n, Spain = 2043n, India = 2209n, UAE = 1028n, Saudi Arabia = 1048n, Mexico = 1227n, Brazil = 1048n

APPENDIX: FANBASES

The popularity of Tennis grew among sports fans in the US, France, Italy, India, the UAE, and Saudi Arabia

2024 vs. 2025: Following of key sports across markets

% selected, Among all sports fans

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
Soccer	20%	22%	38%	38%	84%	84%	44%	65%	84%	83%	77%	79%	86%	84%	61%	60%	79%	79%	94%	93%
Olympics	41%	39%	55%	54%	44%	43%	13%	53%	51%	47%	51%	52%	45%	44%	32%	33%	17%	29%	13%	15%
Tennis	16%	19%	29%	24%	39%	42%	28%	45%	27%	29%	47%	52%	51%	55%	33%	37%	20%	31%	13%	18%
Basketball	60%	61%	44%	45%	10%	14%	14%	19%	23%	24%	21%	19%	44%	41%	20%	22%	56%	41%	34%	23%
F1 racing	10%	13%	16%	17%	32%	36%	8%	23%	35%	36%	44%	44%	49%	46%	22%	22%	19%	33%	24%	24%
Swimming	14%	15%	22%	16%	18%	19%	42%	26%	24%	27%	31%	29%	19%	20%	16%	16%	20%	32%	20%	21%
American Football	81%	79%	39%	42%	11%	11%	1%	4%	19%	17%	3%	3%	7%	4%	10%	14%	13%	15%	7%	6%
Track and field	15%	14%	11%	12%	18%	23%	20%	30%	32%	30%	33%	33%	20%	23%	6%	8%	5%	18%	4%	13%
Baseball	55%	57%	46%	43%	3%	5%	2%	2%	5%	6%	2%	2%	5%	4%	6%	10%	4%	8%	3%	3%
Cricket	2%	2%	5%	5%	28%	28%	0%	0%	1%	1%	0%	0%	0%	0%	91%	91%	19%	24%	4%	4%
Rugby	2%	3%	4%	5%	31%	30%	12%	40%	4%	3%	8%	8%	5%	5%	4%	4%	2%	5%	1%	1%
Golf	20%	21%	26%	21%	19%	20%	5%	4%	7%	7%	3%	3%	6%	5%	5%	7%	7%	10%	5%	5%
Sample Sizes	*2138*	*2051*	*2007*	*2039*	*2001*	*2046*	*1972*	*2043*	*2010*	*2046*	*2008*	*2036*	*1861*	*2043*	*2033*	*2209*	*1045*	*1028*	*1007*	*1048*

= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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

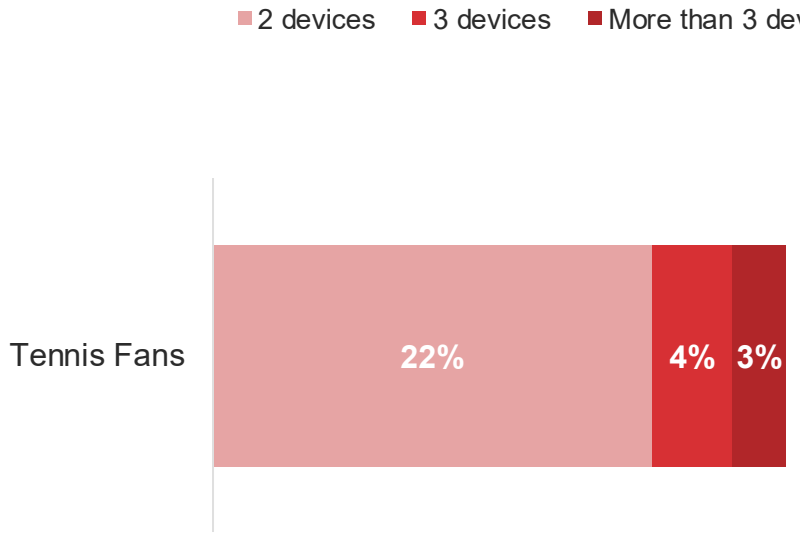
APPENDIX

Tennis Highlights

Around 3-in-10 tennis fans typically use 2 or more devices when watching sporting events, primarily for getting updates on other games

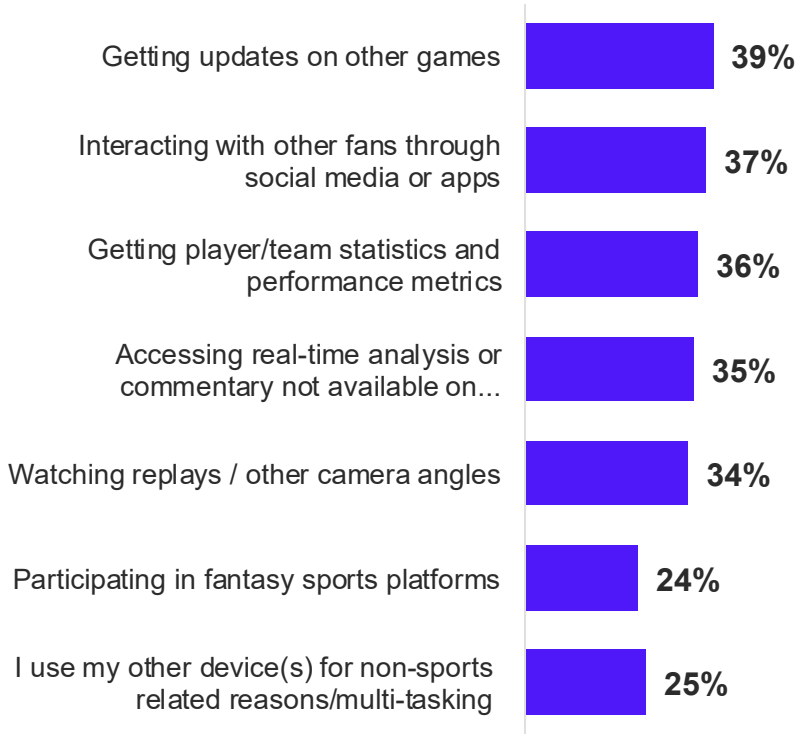
Multi-Device Use While Watching Sporting Events

Among all tennis fans



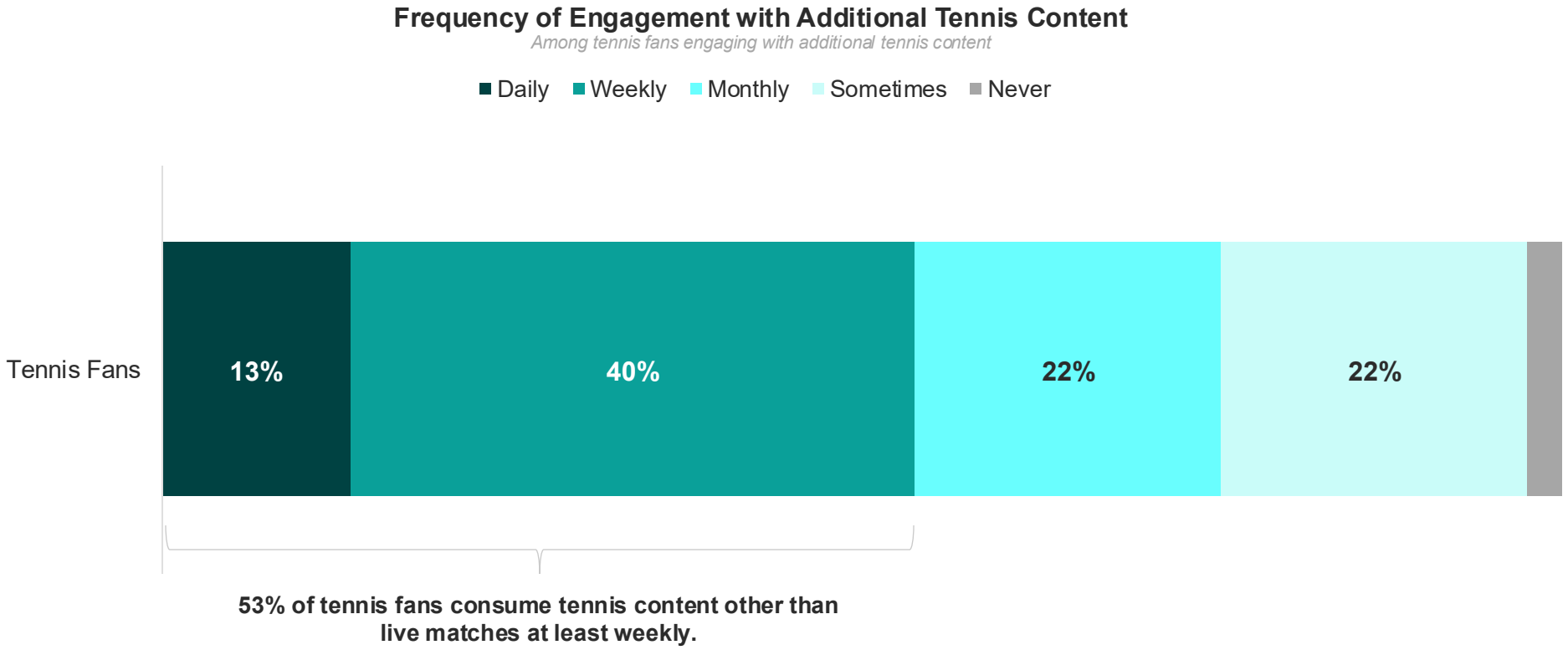
Top Reasons for Using Multiple Devices When Consuming Sporting Events

% selected (select up to 3), Among tennis fans who use 2 or more devices when watching sporting events



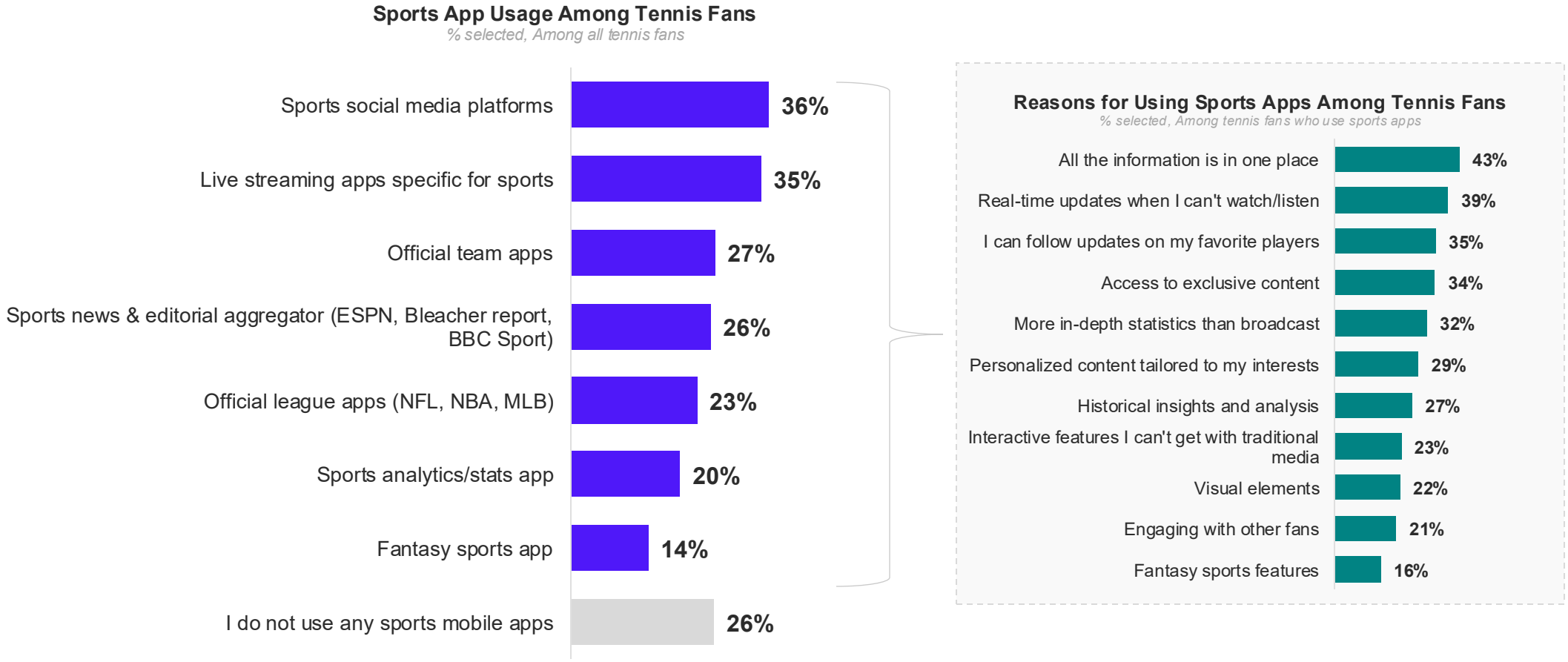
IBM14 How many devices are you typically using while watching and/or listening to a sporting event?
Sample Size: Tennis Fans = 7095, Tennis Fans Using 2 or More Devices While Watching Sporting Events = 2551

More than half of tennis fans engage with additional tennis content on a daily or weekly basis



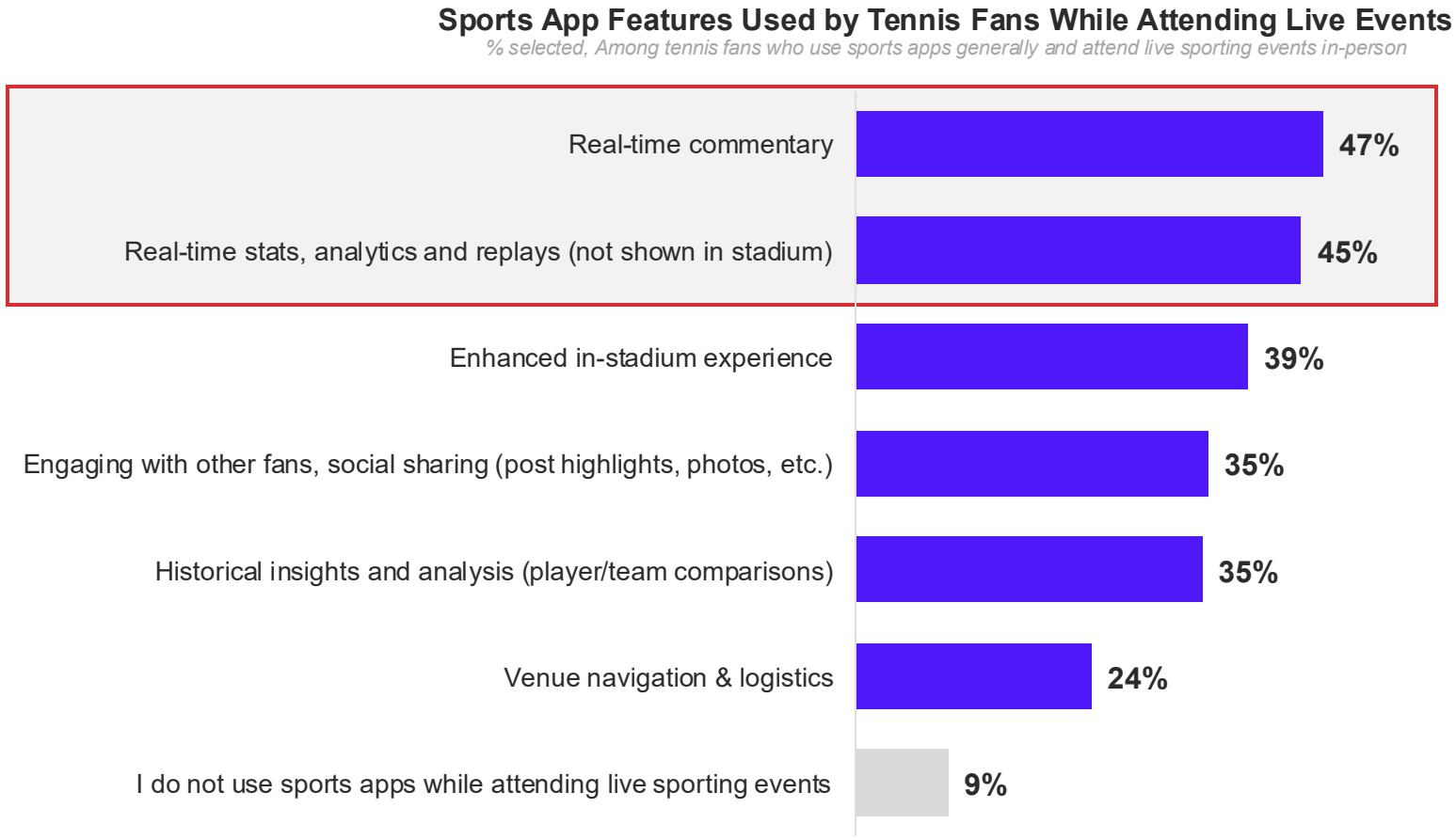
IBM18 How often do you engage with additional content for each of the following sports?
Sample Size: Tennis Fans = 6213

74% percent of global tennis fans currently use sports apps, most often as a one-stop shop for all sports information and for receiving real-time updates when they can’t watch events live



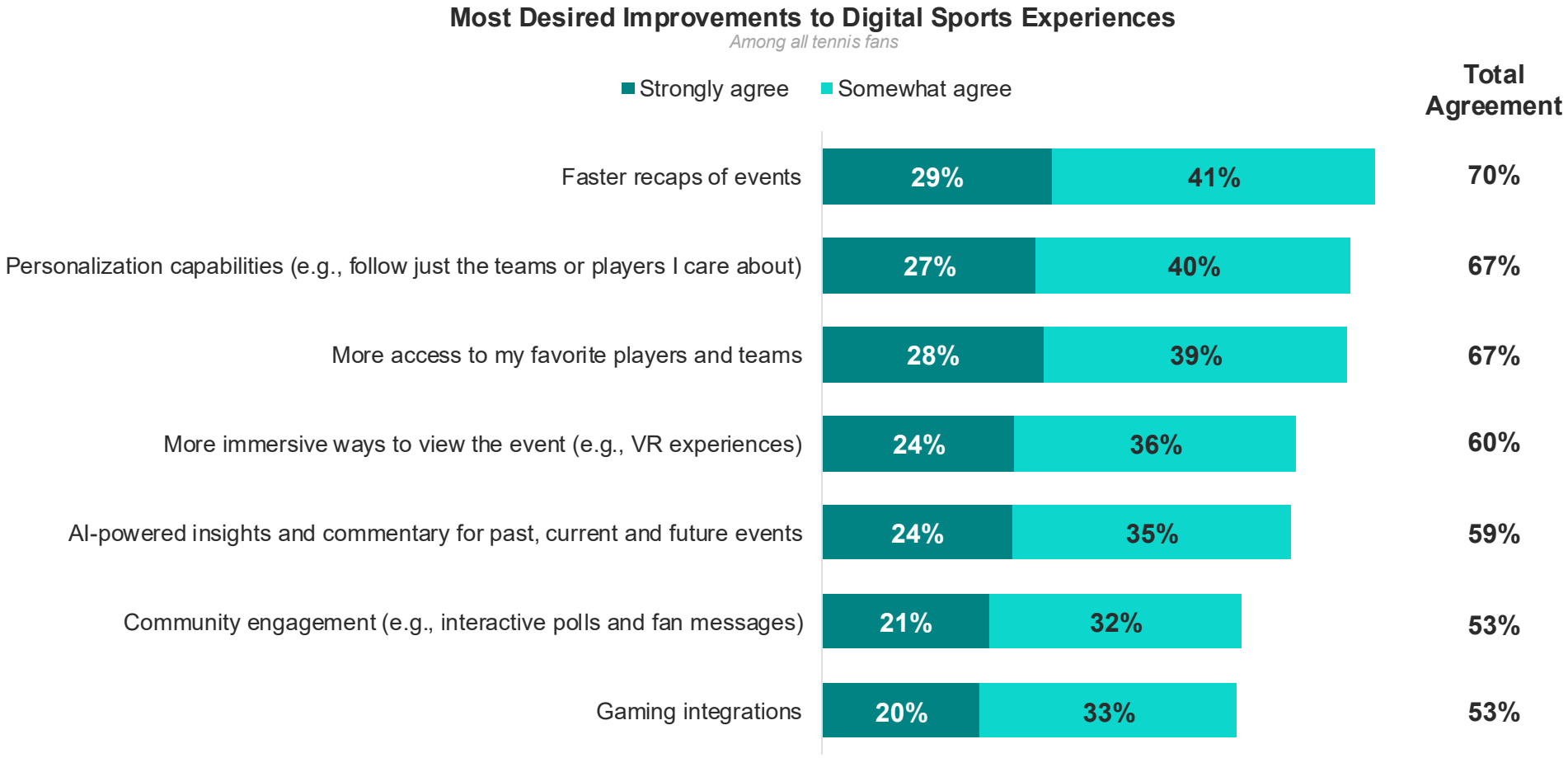
IBM27 What types of sports mobile apps do you currently use? Select all that apply. / IBM30 What primarily motivates you to use sports apps? Select all that apply.
Sample Size: Tennis Fans = 7095, Tennis Fans Using Sports Apps =

Among app-using sporting event attendees, 91% of tennis fans access sports apps during matches, primarily for real-time commentary and analysis



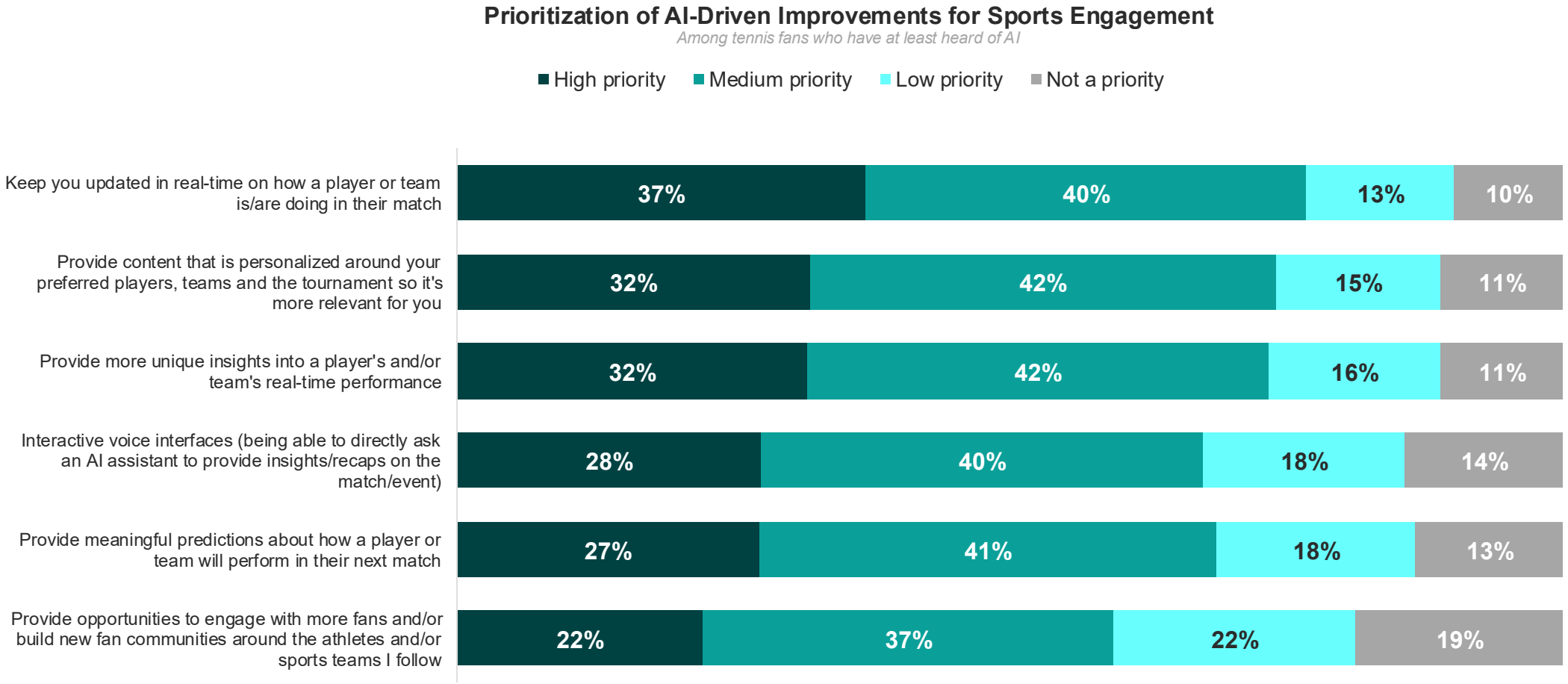
IBM28 What features are you most likely to engage with on a sports app while attending a live sporting event in-person? Select all that apply.
Sample size: Tennis Fans = 4514

Tennis fans' top digital experience improvements are summarization, personalization, and greater access to favorite teams and athletes



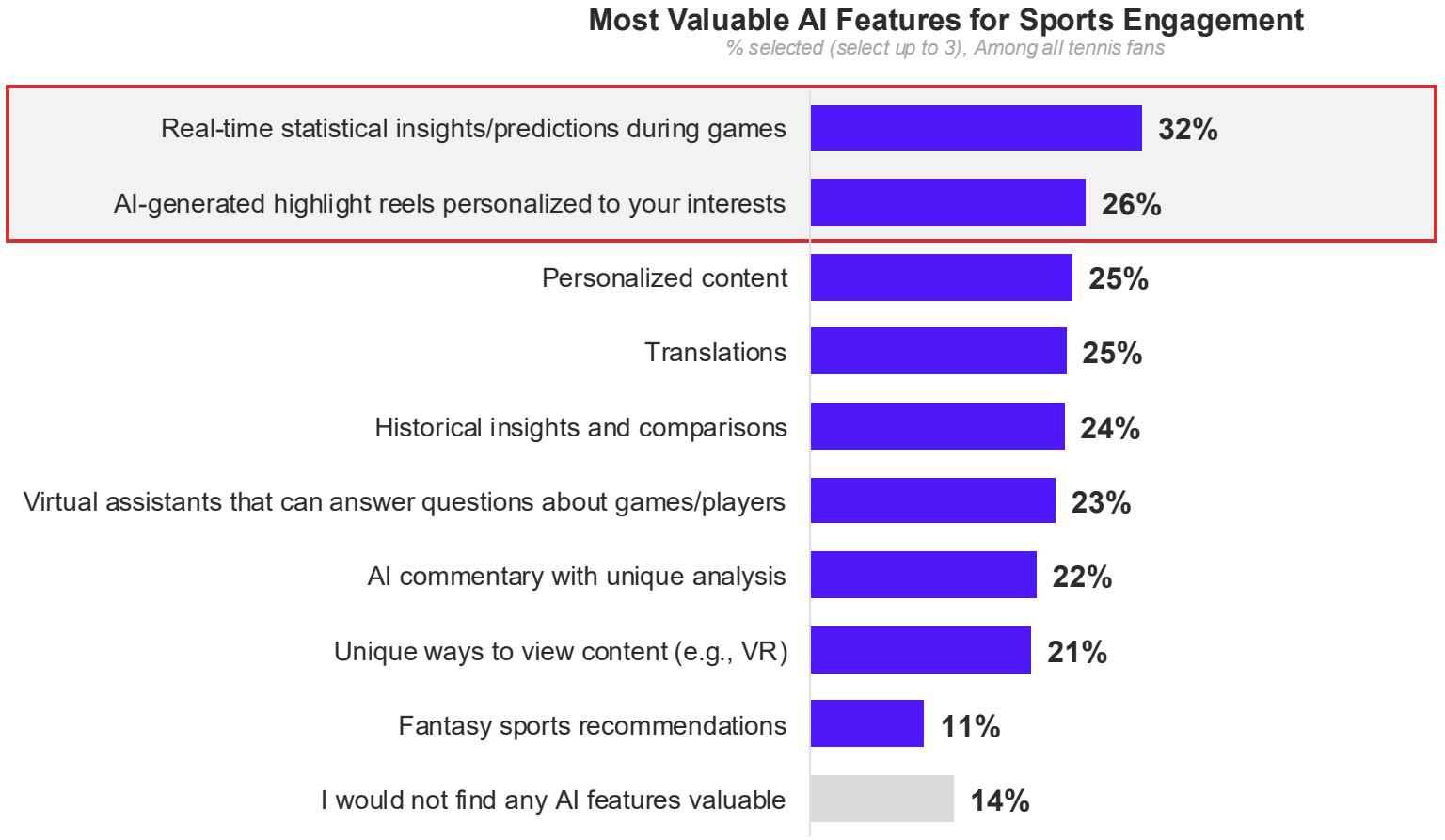
IBM32 How much do you agree or disagree with the following statements about enhancements/improvements to digital sports experiences (e.g., apps, platforms)? I would like...
Sample Size: Tennis Fans = 7095

37% of tennis fans rate real-time updates on player or team performance as a high-priority AI-driven improvement for sports engagement



IBM23 If generative AI could improve the way you engage with your favorite sports in the future, how would you prioritize the following areas?
Sample sizes: Tennis Fans = 6651

86% of tennis fans find value in AI-powered features in their sports engagement experience, with real-time insights and personalized highlights topping the list

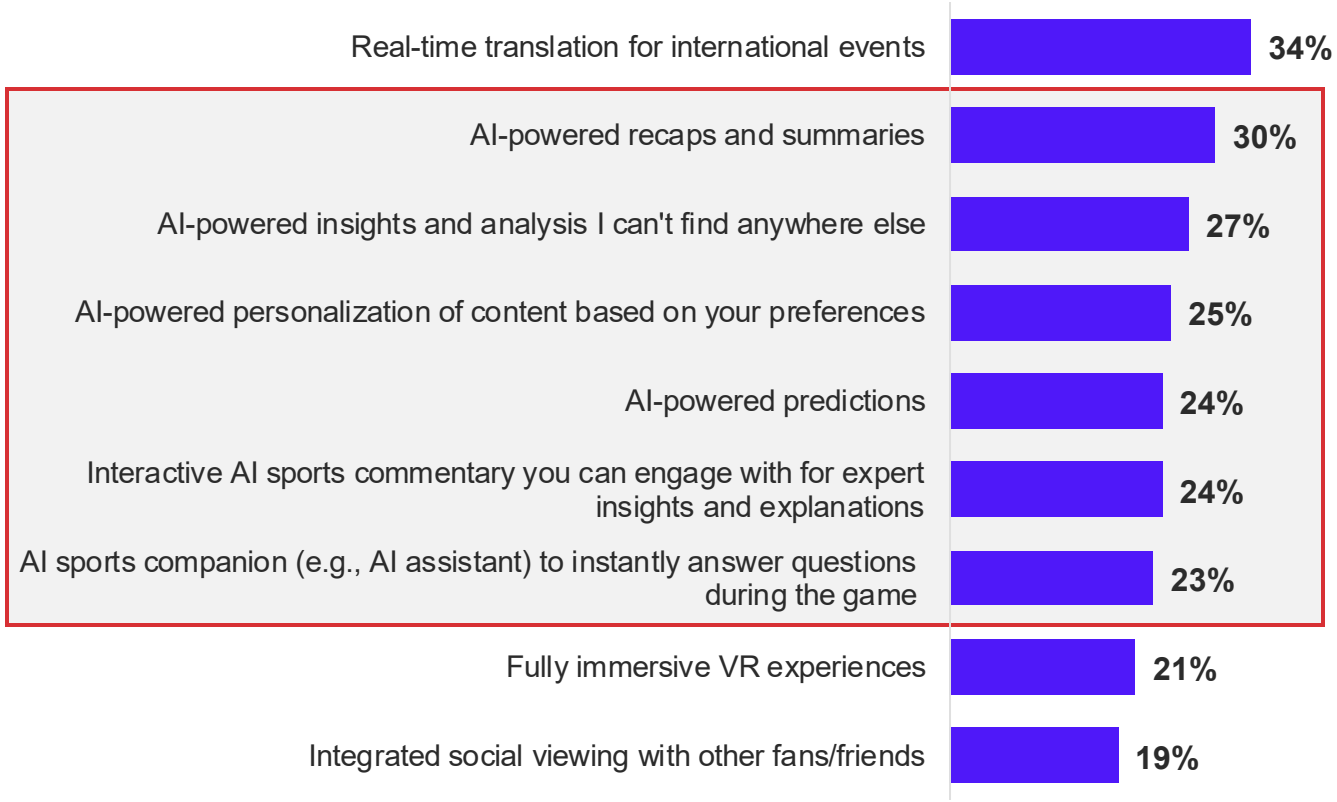


IBM31 Which of the following AI features would you find most valuable in your sports viewing or app experience? Select up to three.
Sample Size: Tennis Fans = 7095n

34% of tennis fans believe real-time translations for international events will most significantly enhance their sports viewing experience by 2027

Top Top 3 Technology Features Expected to Enhance Sports Viewing in the Next 2-3 Years

% selected (select up to 3), Among all tennis fans



83% of tennis fans selected at least one AI-powered feature, indicating that most believe AI will significantly enhance their sports viewing experience in the next 2–3 years.

IBM33 Which of the following technology-powered features do you believe will most significantly enhance your sports viewing experience in the next 2-3 years? Select up to 3.
Sample Size: Tennis Fans = 7095

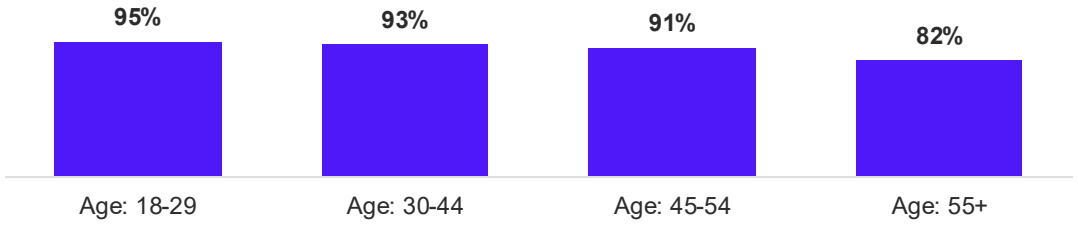
APPENDIX

Gen Z Highlights

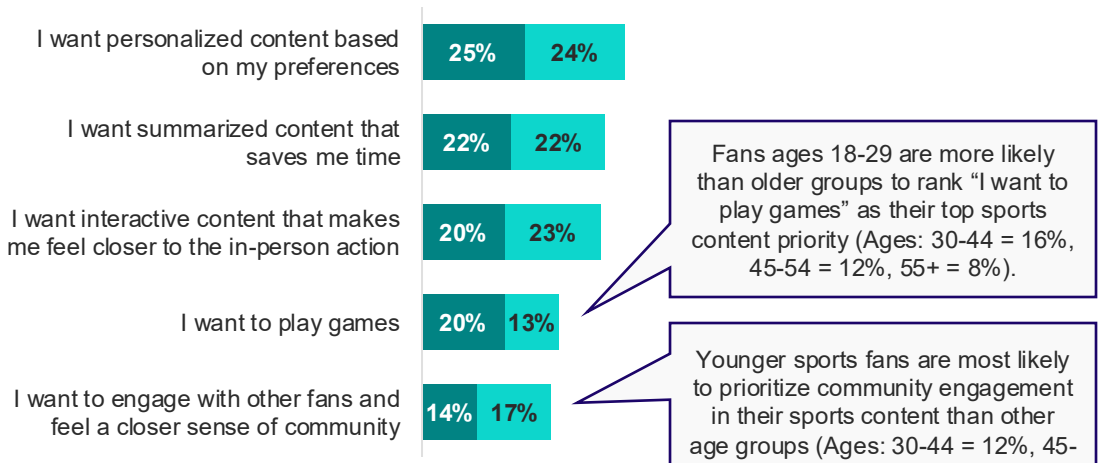
Sports Content Engagement

GenZers consume more and want it personalized: Sports fans ages 18-29 are the most likely to seek out additional content, prioritizing personalization above all else.

Engagement With Additional Sports Content
% engaging with additional content, Among all sports fans



Gen Z: Ranking of Most Important Sports Content Criteria
Among fans ages 18-29 who consume additional sports content



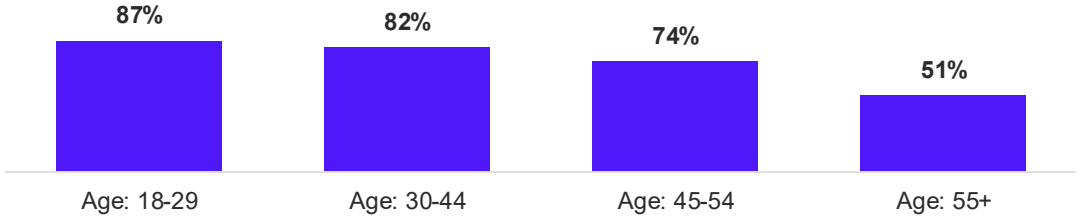
Fans ages 18-29 are more likely than older groups to rank "I want to play games" as their top sports content priority (Ages: 30-44 = 16%, 45-54 = 12%, 55+ = 8%).

Younger sports fans are most likely to prioritize community engagement in their sports content than other age groups (Ages: 30-44 = 12%, 45-54 = 11%, 55+ = 8%).

Sports apps are most popular among the youngest generation of sports fans.

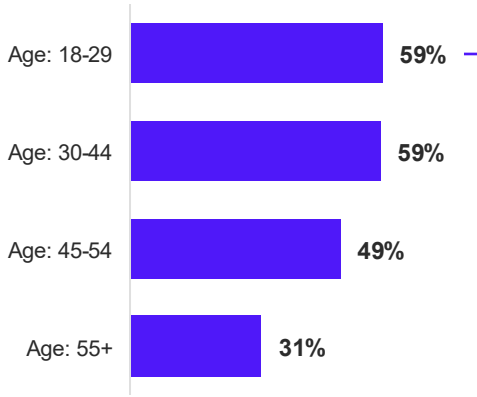
Sports social media platforms are the go-to sports app for fans ages 18-29.

Sports App Usage
% using sports apps, Among all sports fans



Game analysis, reactions, and humor are what draw Gen Z sports fans to their favorite influencers.

Sports Fans Who Follow Sports Influencers
% using sports apps, Among all sports fans



Gen Z: Top 3 Most Popular Types of Content from Sports Influencers
Among fans ages 18-29 who follow sports influencers

- 55% Sports analysis / predictions
- 54% Game reactions / highlights
- 45% Humorous or meme content

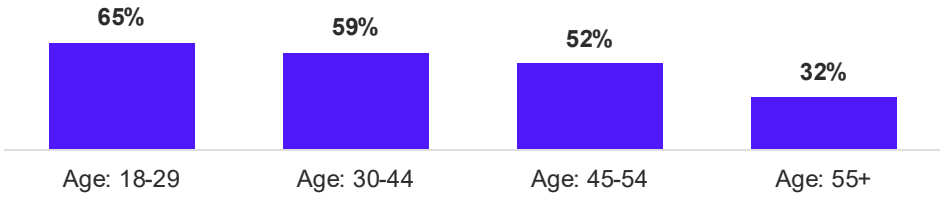
Sports fans ages 18-29 are more likely than older groups to say meme content is what they enjoy most (30-44 = 38%, 45-54 = 35%, 55+ = 28%).

AI Usage & Preferences

Gen Z sports fans lead in AI usage and place the **highest value on real-time and personalized AI enhancements and features**.

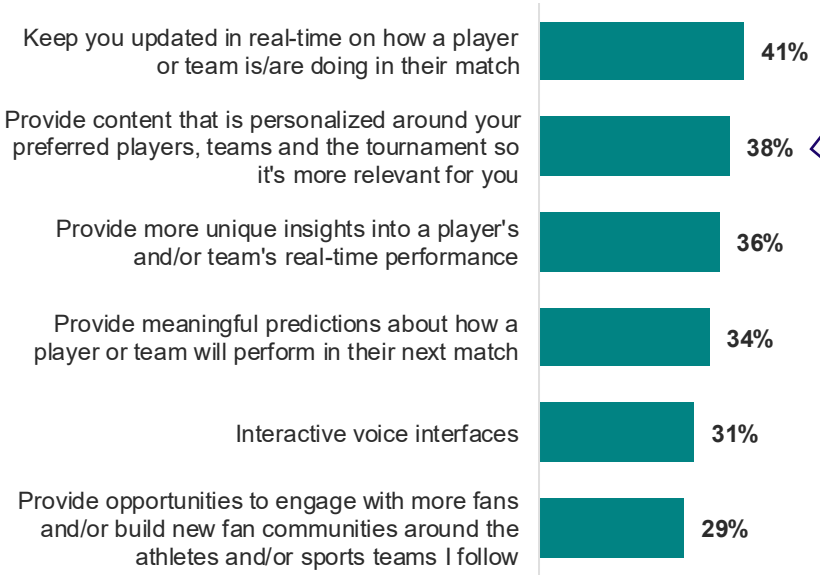
AI Usage

% using AI, Among all sports fans



Gen Z: Top Priorities for Improving Sports Engagement with AI

% high priority, Among fans ages 18-29 who have at least heard of AI



Fans ages 18-29 are more likely than older groups to consider personalization a high priority (Ages: 30-44 = 35%, 45-54 = 31%, 55+ = 18%).

Most Valuable AI Features for Sports Engagement

% selected (select up to 3), Among all fans ages 18-29



Personalization is a top AI feature for sports engagement across all age groups, but fans ages 18-29 are especially likely to value it (Ages: 30-44 = 27%, 45-54 = 27%, 55+ = 18%).

Younger sports fans (ages 18-29) are the most enthusiastic about AI features, with nearly all (94%) seeing value in them (Ages: 30-44 = 91%, 45-54 = 86%, 55+ = 69%).

APPENDIX

Longitudinal Insight Overview

The following section provides a global overview of how sports fans' behaviors and attitudes have changed between 2024 and 2025. To ensure accurate year-over-year comparisons, Mexico and Brazil are excluded from these analyses, as they were not included in last year's data. As a result, the "global" insights in this section may differ from the "global" figures presented in sections, 1, 2, 3, and the appendix.

While personalization and summarization remain leading priorities for sports fans when consuming sports content, more fans are shifting focus toward community- and interaction-based content

2024 vs. 2025: Most Important Sports Content Criteria (Rank 1)

% ranked 1st, Among those who consume additional sports content

	Global Sports Fans		Age: 18-29		Age: 30-44		Age: 45-54		Age: 55+	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
I want personalized content based on my preferences	26%	25%	27%	25%	26%	24%	27%	26%	27%	26%
I want summarized content that saves me time	33%	30%	24%	22%	29%	27%	35%	31%	42%	40%
I want interactive content that makes me feel closer to the in-person action	18%	19%	20%	19%	19%	20%	19%	20%	16%	18%
I want to play games	14%	14%	19%	20%	16%	17%	10%	12%	9%	8%
I want to engage with other fans and feel a closer sense of community	9%	11%	10%	14%	10%	13%	8%	12%	6%	7%
Sample Sizes	*16606*	*16660*	*3726*	*3512*	*5292*	*5537*	*2831*	*3006*	*4757*	*4605*

2024 vs. 2025: Second Most Important Sports Content Criteria (Rank 2)

% ranked 2nd, Among those who consume additional sports content

	Global Sports Fans		Age: 18-29		Age: 30-44		Age: 45-54		Age: 55+	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
I want personalized content based on my preferences	29%	27%	26%	24%	28%	25%	30%	27%	33%	32%
I want summarized content that saves me time	24%	22%	22%	22%	24%	21%	24%	22%	25%	24%
I want interactive content that makes me feel closer to the in-person action	24%	23%	23%	24%	24%	22%	25%	22%	25%	23%
I want to engage with other fans and feel a closer sense of community	12%	17%	15%	18%	12%	18%	10%	16%	9%	15%
I want to play games	11%	11%	14%	13%	12%	13%	11%	12%	8%	7%
Sample Sizes	*16606*	*16660*	*3726*	*3512*	*5292*	*5537*	*2831*	*3006*	*4757*	*4605*

= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

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.
Note: Global insights in this section do not include Mexico and Brazil

As community becomes a bigger focus in sports content, fans are now more likely than in 2024 to see community and fan interaction as important areas for AI-driven improvements in their sports engagement

Community-centered improvements were already a priority for fans ages 18–29, and now fans ages 30–44 and 45–54 are increasingly recognizing the potential of AI to enhance community engagement in sports.

2024 vs. 2025: Prioritization of Community-Building Improvements with AI for Sports Engagement

% selected to "Provide opportunities to engage with more fans and/or build new fan communities around the athletes and/or sports teams I follow", Among those who have at least heard of AI

	All Sports Fans		Age: 18-29		Age: 30-44		Age: 45-54		Age: 55+	
	May 2024	June 2025	May 2024	June 2025	May 2024	June 2025	May 2024	June 2025	May 2024	June 2025
High priority	20%	21%	27%	29%	24%	27%	17%	20%	12%	9%
Medium priority	35%	37%	42%	43%	39%	41%	36%	38%	24%	27%
Low priority	25%	22%	21%	20%	23%	20%	27%	22%	29%	25%
Not a priority	20%	20%	10%	9%	13%	12%	21%	19%	36%	39%
Sample Sizes	*16259*	*17150*	*3661*	*3535*	*5115*	*5563*	*2776*	*3090*	*4707*	*4962*

= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

IBM23 If generative AI could improve the way you engage with your favorite sports in the future, how would you prioritize the following areas?
Note: Global insights in this section do not include Mexico and Brazil

Multi-device usage during sports viewing is on the rise, with a significant year-over-year increase in the share of fans using two or more devices simultaneously

2024 vs. 2025: Multi-Device Use While Watching Sporting Events

% selected, Among all sports fans

	Global Sports Fans		Age: 18-29		Age: 30-44		Age: 45-54		Age: 55+	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
NET: Uses 2 or more devices	27%	29%	39%	40%	34%	36%	23%	28%	13%	13%
Sample Sizes	*18082*	*18589*	*3895*	*3704*	*5645*	*5933*	*3123*	*3324*	*5419*	*5628*

= Significant increase between 2024 and 2025 at 95% CI = Significant decrease between 2024 and 2025 at 95% CI

IBM14 How many devices are you typically using while watching and/or listening to a sporting event?
Note: Global insights in this section do not include Mexico and Brazil



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