

IBM Sports Intelligence Report

— August 2026





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METHODOLOGY

Methodology

This survey was commissioned by IBM and conducted by Morning Consult June 24-30, 2026, among a total sample of 20,589 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%.

Contextual Note: Fieldwork coincided with the 2026 FIFA World Cup which may have influenced the awareness, behavior, and perception of soccer in all markets.

Audience

Sports Fans

	2025 Survey		2026 Survey	
	Sample Size	Margin of Error (MOE)	Sample Size	Margin of Error (MOE)
Global	20864	+/- 1%	20589	+/- 1%
US	2051	+/- 2%	2063	+/- 2%
CANADA	2039	+/- 2%	2047	+/- 2%
UK	2046	+/- 2%	2031	+/- 2%
FRANCE	2043	+/- 2%	2055	+/- 2%
GERMANY	2046	+/- 2%	2043	+/- 2%
ITALY	2036	+/- 2%	2031	+/- 2%
SPAIN	2043	+/- 2%	2043	+/- 2%
INDIA	2209	+/- 2%	2073	+/- 2%
UAE	1028	+/- 3%	1044	+/- 3%
SAUDI ARABIA	1048	+/- 3%	1055	+/- 3%
MEXICO	1227	+/- 3%	1054	+/- 3%
BRAZIL	1048	+/- 3%	1050	+/- 3%

KEY FINDINGS

AI is now part of how fans follow sport, and fans are clear about wanting accuracy above all.

- Adoption is mainstream and still climbing: 69% of fans use AI, with usage up in all twelve markets and deepest in India, the Gulf and Brazil.
- Trust hasn't kept pace. A majority of fans still trust AI-generated sports content, but it has narrowed since 2025. Fans who use AI regularly are nearly three times more likely to trust AI-generated content than non-users.
- Fans favor accuracy over speed by nearly two to one.
- Appetite for AI is broad when it serves a clear purpose: real-time information leads the list of what fans want from AI, and trust is high among F1, tennis and golf fans.



Sport has never been easier to reach or harder to assemble. Fans recognize the convenience of consolidation but are hesitant to pay for it.

- Streaming has reached parity with linear broadcast, which now holds mainly Gen X and Boomers, and three-quarters of fans expect their viewing habits to change again by 2027.
- 39% of fans say they are frustrated by managing multiple subscriptions, and frustration runs highest among the fans watching most often.
- 47% of fans would download a single centralized sports app, but only 30% would pay for one, and more say they wouldn't.
- No single feature stands out as a clear subscription driver. Premium live access and content consolidation lead, closely followed by exclusive content.



Apps are becoming the home of fandom and where fans find each other

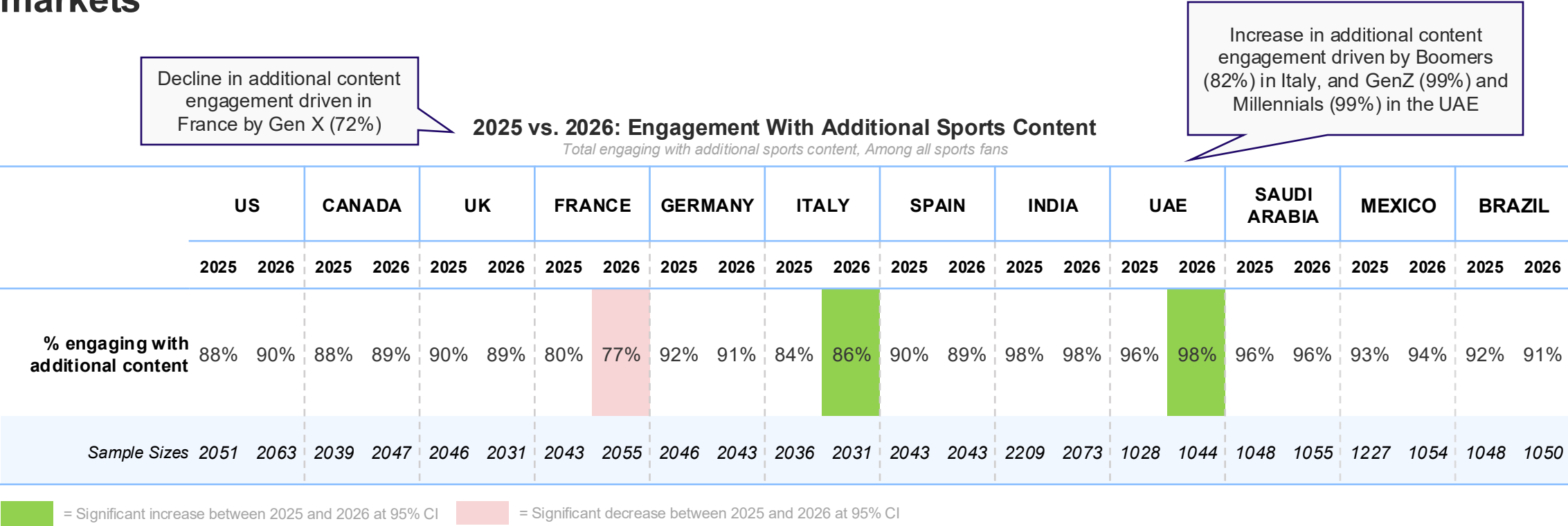
- 72% of fans use sports apps, with a single destination for information emerging as the top motivator. Real-time updates perform best, while AI-powered insights have the most room to grow.
- Apps are also where fans transact — a third of app users bought tickets in the past year, with similar shares ordering food or buying merchandise.
- Community is becoming a bigger part of fandom. Social platforms are the leading meeting place. More than a quarter of fans want AI-powered features that connect them with like-minded fans.
- At live events, fans prefer technology that complements the experience led by reliable connectivity and access to real-time stats.

SECTION 1

Fandom Beyond the Game

FANDOM BEYOND THE GAME

Engagement with additional sports content has weakened in France, but strengthening in Italy and the UAE in the last year; engagement otherwise remains stable and high across markets



FANDOM BEYOND THE GAME

At least eight in 10 fans of every major sport engage beyond live events

Engagement with Additional Sports Content

% selected, Among fans of specific sports

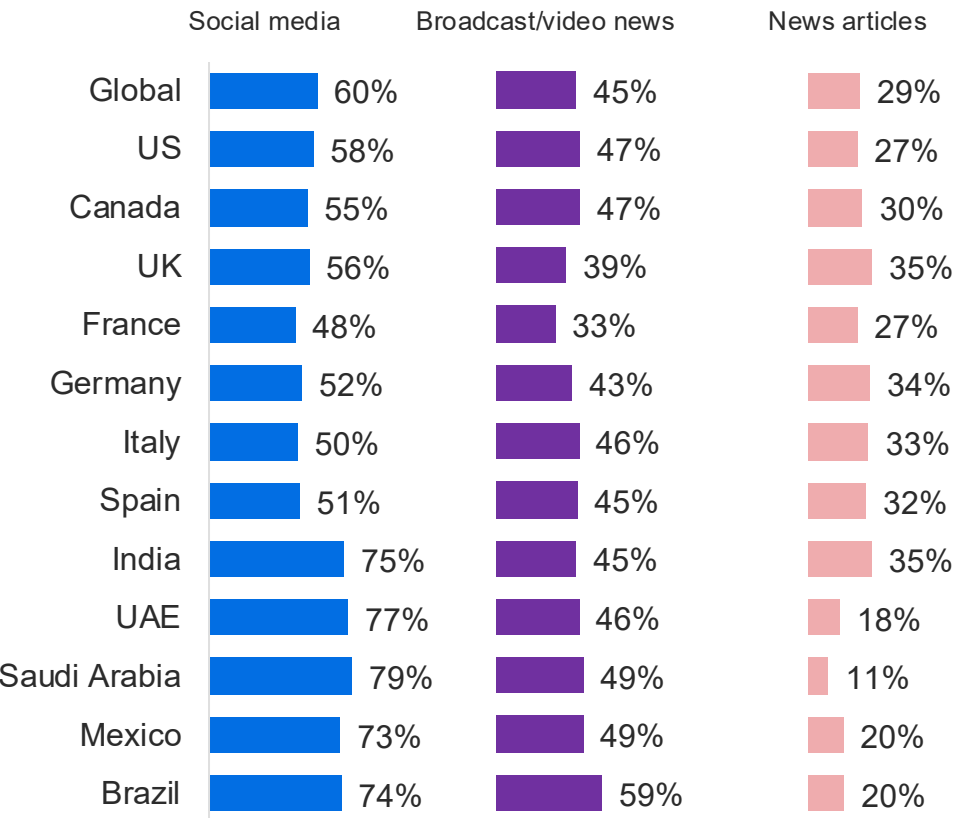
	Video Highlights	News coverage	News articles	Social media posts	Team/league websites	Mobile sports apps	Blogs/fan websites	Fan forums or discussion boards	Podcasts	Total consuming additional content
Soccer Fans	40%	37%	31%	32%	25%	26%	13%	14%	16%	90%
Cricket Fans	50%	39%	36%	48%	29%	38%	22%	21%	25%	96%
Tennis Fans	35%	36%	29%	24%	16%	19%	11%	11%	12%	88%
Basketball Fans	40%	33%	27%	32%	23%	23%	14%	14%	17%	92%
Baseball Fans	39%	36%	28%	29%	24%	22%	13%	14%	15%	90%
Rugby Fans	24%	36%	28%	20%	19%	17%	10%	10%	12%	83%
Golf Fans	37%	37%	27%	25%	17%	19%	12%	14%	16%	89%
American Football Fans	42%	37%	26%	33%	25%	23%	14%	14%	17%	91%
F1 racing Fans	40%	36%	30%	29%	19%	21%	13%	15%	15%	91%
Track and field Fans	32%	38%	29%	20%	13%	16%	9%	10%	10%	84%
Swimming Fans	33%	34%	26%	25%	16%	18%	13%	13%	14%	88%
Olympics Fans	37%	43%	31%	25%	15%	16%	9%	10%	11%	87%

FANDOM BEYOND THE GAME

Social media is the leading sports content channel for Gen Z and Millennials in every market, reaching 75% and 70% globally

Top 3 Channels Used to Consume Additional Content

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



Top Channel Used to Consume Additional Content

Top response, Among those engaging with additional content

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Social – 75%	Social – 70%	Social – 54%	Broadcast – 49%
US	Social	Social	Social	Broadcast
Canada	Social	Social	Broadcast	Broadcast
UK	Social	Social	Social	Articles
France	Social	Social	Social	Radio
Germany	Social	Social	Broadcast	Broadcast
Italy	Social	Social	Broadcast	Broadcast
Spain	Social	Social	Broadcast	Broadcast
India	Social	Social	Social	Social
UAE	Social	Social	Social	*Social *Broadcast
Saudi Arabia	Social	Social	Social	*Social *Broadcast
Mexico	Social	Social	Social	Broadcast
Brazil	Social	Social	Social	Broadcast

*Tied for top 1

Social
= Social Media

Broadcast
= Broadcast/video news

Articles
= News articles (print/digital)

Radio
= Radio

Social media extends its global lead as sports content habits continue to shift away from traditional channels in several markets; podcasts see growing in popularity in the US and India

2025 vs. 2026: Most Used Channels for Consuming Additional Content
% selected (Select up to 3), Among those who consume additional sports content

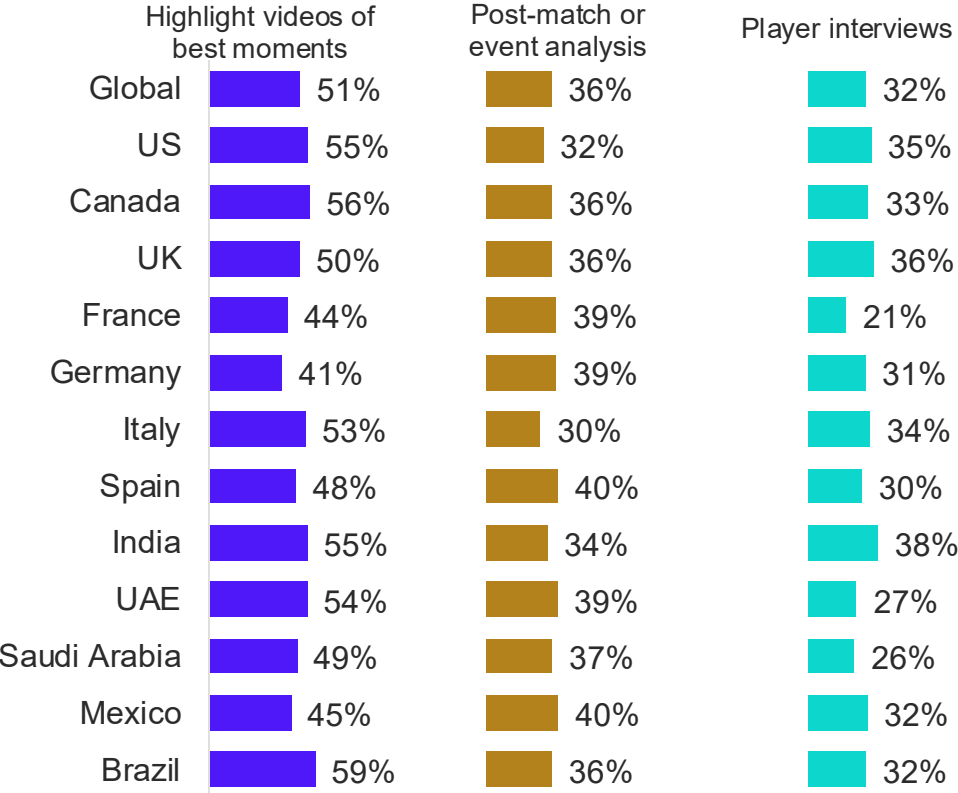
	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA		MEXICO		BRAZIL	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
Social media	56%	58%	52%	55%	51%	56%	46%	48%	53%	52%	49%	50%	45%	51%	73%	75%	79%	77%	82%	79%	69%	73%	70%	74%
Broadcast/video news	50%	47%	44%	47%	39%	39%	34%	33%	42%	43%	46%	46%	49%	45%	48%	45%	51%	46%	51%	49%	50%	49%	56%	59%
News articles (print/digital)	26%	27%	33%	30%	39%	35%	28%	27%	34%	34%	36%	33%	32%	32%	39%	35%	19%	18%	11%	11%	21%	20%	19%	20%
Official league/team/player websites or apps	23%	24%	24%	25%	25%	24%	22%	24%	29%	26%	26%	26%	25%	26%	32%	33%	42%	36%	37%	40%	29%	31%	30%	30%
Radio	19%	18%	19%	19%	24%	25%	30%	31%	31%	30%	26%	25%	32%	28%	8%	10%	10%	8%	4%	3%	17%	13%	16%	12%
Podcast	17%	21%	15%	13%	17%	17%	10%	10%	12%	10%	8%	9%	13%	14%	20%	23%	15%	18%	12%	15%	16%	19%	17%	18%
Feature documentaries / reality docuseries	11%	11%	11%	10%	15%	15%	15%	14%	12%	13%	11%	11%	7%	8%	14%	15%	16%	16%	12%	13%	11%	11%	14%	11%
Blogs	6%	8%	7%	6%	7%	6%	5%	5%	7%	7%	5%	5%	5%	4%	15%	16%	11%	11%	6%	8%	6%	6%	5%	4%
None of the above	3%	5%	4%	4%	3%	3%	5%	5%	2%	3%	3%	2%	2%	2%	1%	0%	1%	1%	1%	1%	2%	1%	1%	2%
Sample Sizes	1806	1849	1800	1829	1843	1811	1638	1587	1883	1854	1704	1750	1829	1794	2160	2040	989	983	1008	1017	1143	994	960	957

= Significant increase between 2025 and 2026 at 95% CI = Significant decrease between 2025 and 2026 at 95% CI

Beyond the game, highlight videos dominate sports content consumption, followed by post-event analysis and player content

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

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Highlights – 48%	Highlights – 51%	Highlights – 52%	Highlights – 53%
US	Highlights	Highlights	Highlights	Highlights
Canada	Highlights	Highlights	Highlights	Highlights
UK	Highlights	Highlights	Highlights	Highlights
France	Highlights	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 *Analysis (RT)
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

*Tied for top 1

FANDOM BEYOND THE GAME

While sports fans still prioritize personalized content and summarized content across markets, for fans in the US, Germany, and Brazil, community engagement has grown in importance in since 2025

2025 vs. 2026: Most Important Sports Content Criteria (Rank 1 or 2)

% ranked 1st or 2nd, Among those who consume additional sports content

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA		MEXICO		BRAZIL	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
Personalized content based on my preferences	57%	53%	54%	55%	51%	55%	50%	49%	56%	52%	52%	53%	54%	58%	48%	49%	48%	49%	47%	46%	53%	55%	56%	57%
Summarized content that saves me time	50%	51%	58%	59%	56%	55%	61%	57%	60%	56%	55%	52%	53%	51%	41%	40%	43%	47%	41%	46%	50%	47%	48%	45%
Interactive content that makes me feel closer to the in-person action	38%	37%	38%	38%	42%	39%	43%	45%	31%	35%	48%	45%	47%	44%	42%	44%	49%	45%	48%	47%	46%	50%	50%	51%
I want to engage with other fans and feel a closer sense of community	28%	31%	27%	27%	29%	29%	25%	27%	23%	26%	25%	27%	25%	25%	33%	33%	33%	29%	35%	33%	25%	25%	22%	28%
I want to play games	27%	27%	24%	22%	22%	21%	21%	23%	30%	30%	21%	24%	20%	21%	36%	34%	26%	29%	28%	29%	26%	23%	23%	19%
Sample Sizes	1806	1849	1800	1829	1843	1811	1638	1587	1883	1854	1704	1750	1829	1821	2160	2040	989	1028	1008	1017	1143	994	960	957

 = Significant increase between 2025 and 2026 at 95% CI  = Significant decrease between 2025 and 2026 at 95% CI

SECTION 2

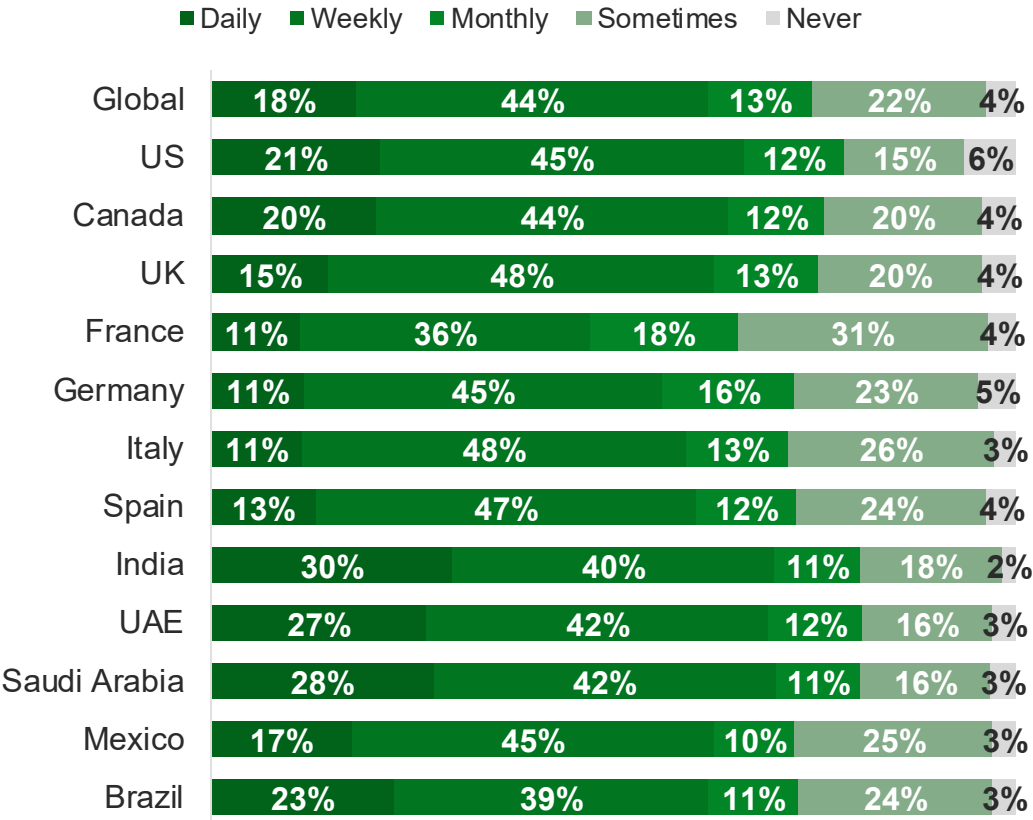
The New Sports Consumption Landscape

THE NEW SPORTS CONSUMPTION LANDSCAPE

More than six in 10 fans watch live sports weekly, with Gen Z and Millennials leading at 63% and 65%

Frequency of Watching Live Sporting Events

Among all sports fans



Frequent Live Sporting Event Watchers

% weekly+, Among all sports fans

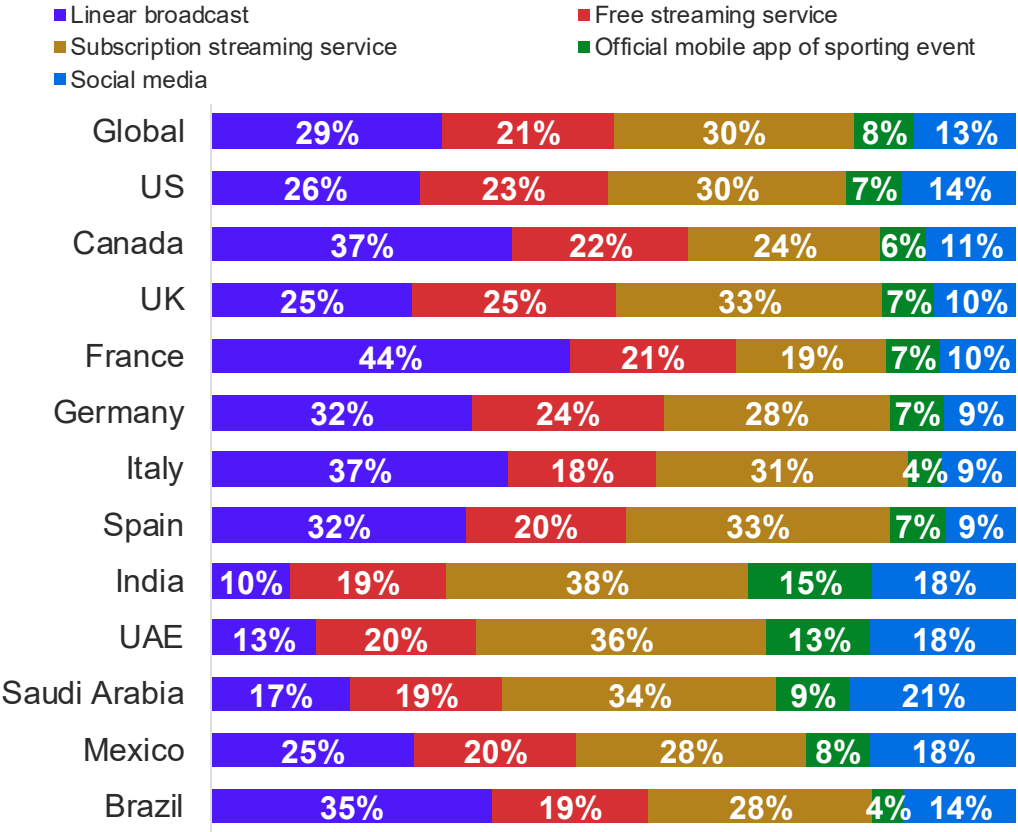
Generations	Gen Z	Millennials	Gen X	Boomers
Global	63%	65%	60%	57%
US	63%	69%	65%	65%
Canada	61%	62%	63%	70%
UK	64%	65%	64%	56%
France	53%	53%	45%	41%
Germany	58%	60%	54%	53%
Italy	61%	60%	57%	59%
Spain	61%	62%	60%	58%
India	69%	73%	66%	56%
UAE	64%	73%	68%	50%
Saudi Arabia	66%	72%	69%	83%
Mexico	64%	62%	62%	59%
Brazil	64%	63%	58%	63%

THE NEW SPORTS CONSUMPTION LANDSCAPE

Subscription streaming competes closely with linear broadcast as the leading way to watch live sports, with the former attracting roughly a third of Gen Z and Millennial viewers and the latter remaining relevant for Gen X and Boomers

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

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Sub. Streaming – 32%	Sub. Streaming – 35%	Traditional – 34%	Traditional – 51%
US	Sub. Streaming	Sub. Streaming	Sub. Streaming	Traditional
Canada	Sub. Streaming	Sub. Streaming	Traditional	Traditional
UK	Sub. Streaming	Sub. Streaming	Sub. Streaming	Traditional
France	Sub. Streaming	Traditional	Traditional	Traditional
Germany	Free Streaming	Sub. Streaming	Traditional	Traditional
Italy	Sub. Streaming	Sub. Streaming	Traditional	Traditional
Spain	Sub. Streaming	Sub. Streaming	Traditional	Traditional
India	Sub. Streaming	Sub. Streaming	Sub. Streaming	Free Streaming
UAE	Sub. Streaming	Sub. Streaming	Sub. Streaming	Free Streaming
Saudi Arabia	Sub. Streaming	Sub. Streaming	Sub. Streaming	Free Streaming
Mexico	Sub. Streaming	Sub. Streaming	Sub. Streaming	Traditional
Brazil	Sub. Streaming	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

THE NEW SPORTS CONSUMPTION LANDSCAPE

Linear broadcast is losing ground as subscription streaming and social platforms capture a growing share of live sports viewing

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		MEXICO		BRAZIL	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
Linear broadcast	30%	26%	40%	37%	31%	25%	44%	44%	31%	32%	38%	37%	32%	32%	12%	10%	18%	13%	17%	17%	30%	25%	45%	35%
Subscription streaming service	28%	30%	20%	24%	30%	33%	16%	19%	32%	28%	30%	31%	30%	33%	38%	38%	36%	36%	32%	34%	23%	28%	27%	28%
Free streaming service	24%	23%	26%	22%	25%	25%	23%	21%	22%	24%	21%	18%	23%	20%	20%	19%	20%	20%	19%	19%	20%	20%	13%	19%
Social media platforms	11%	14%	8%	11%	7%	10%	9%	10%	8%	9%	6%	9%	7%	9%	17%	18%	15%	18%	19%	21%	17%	18%	11%	14%
Official mobile app of sporting event / institution	6%	7%	5%	6%	8%	7%	8%	7%	7%	7%	5%	4%	8%	7%	14%	15%	12%	13%	12%	9%	9%	8%	4%	4%
Sample Sizes	1899	1930	1958	1959	1969	1945	1937	1981	1966	1946	1980	1974	1925	1940	2136	2035	1005	968	999	1020	1172	1023	1018	1018

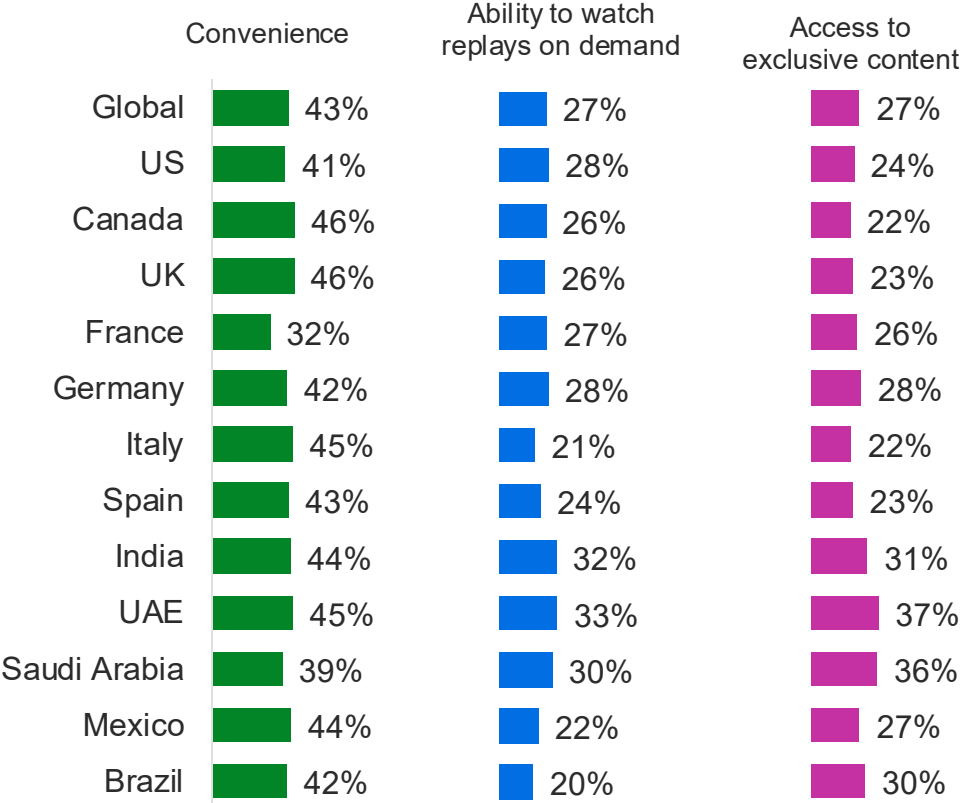
= Significant increase between 2025 and 2026 at 95% CI = Significant decrease between 2025 and 2026 at 95% CI

THE NEW SPORTS CONSUMPTION LANDSCAPE

Convenience is digital viewing’s universal advantage, motivating 43% of fans to choose digital platforms over linear broadcast

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

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Convenience – 40%	Convenience – 41%	Convenience – 44%	Convenience – 50%
US	Convenience	Convenience	Convenience	Convenience
Canada	Convenience	Convenience	Convenience	Convenience
UK	Convenience	Convenience	Convenience	Convenience
France	Convenience	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	Convenience	Convenience	Convenience
Saudi Arabia	Convenience	Convenience	Convenience	Convenience
Mexico	Convenience	Convenience	Convenience	Convenience
Brazil	Convenience	Convenience	Convenience	Convenience

Convenience
= Convenience – I can watch anytime, anywhere

Personalized
= Personalized viewing experience tailored to my interest

Exclusive
= Access to exclusive content

Commentary
= Better commentary options

*Tied for top response

THE NEW SPORTS CONSUMPTION LANDSCAPE

Live viewing remains central across sports, reaching 74% of Olympics fans and more than two-thirds of soccer, cricket, tennis and rugby fans

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
Soccer Fans	72%	30%	22%	19%	18%	16%
Cricket Fans	69%	41%	34%	22%	25%	23%
Tennis Fans	67%	25%	20%	16%	16%	15%
Basketball Fans	58%	35%	26%	19%	21%	17%
Baseball Fans	62%	31%	26%	16%	17%	17%
Rugby Fans	70%	20%	16%	16%	14%	15%
Golf Fans	57%	29%	25%	18%	20%	19%
American football Fans	65%	32%	26%	19%	19%	17%
F1 racing Fans	65%	29%	22%	19%	18%	16%
Track and field Fans	66%	23%	19%	15%	15%	15%
Swimming Fans	51%	28%	22%	18%	17%	19%
Olympics Fans	74%	24%	19%	16%	16%	16%

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

Sample Sizes: Soccer = 15215n, Cricket = 2795n, Tennis = 6829n, Basketball = 6511n, Baseball = 3332n, Rugby = 2009n, Golf = 1987n, American football = 4247n, F1 racing = 6329n, Track and field = 3960n, Swimming = 4316n, Olympics = 8461n

Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

THE NEW SPORTS CONSUMPTION LANDSCAPE

Tennis fans, alongside Soccer and Cricket fans, are increasingly enjoying sporting events live, shifting slightly away from highlight clips via on-demand since 2025

2025 vs. 2026: Methods Used to Watch Favorite Sporting Events by Sport

% selected, Among fans of each sport

	SOCCER		CRICKET		TENNIS		BASKETBALL		BASEBALL		RUGBY		GOLF		AMERICAN FOOTBALL		F1 RACING		TRACK AND FIELD		SWIMMING		OLYMPICS	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
Live	70%	72%	65%	69%	65%	67%	58%	58%	60%	62%	71%	70%	57%	57%	65%	66%	64%	65%	66%	66%	51%	51%	72%	74%
Watching highlight clips on social media	31%	30%	44%	41%	27%	25%	34%	35%	31%	31%	20%	20%	28%	29%	33%	32%	27%	29%	22%	23%	29%	28%	25%	24%
Watching highlight clips on an official website	24%	22%	38%	34%	22%	20%	25%	26%	25%	26%	15%	16%	25%	24%	26%	26%	22%	22%	19%	19%	23%	22%	20%	19%
Full on-demand replay	20%	18%	23%	22%	17%	16%	20%	19%	17%	16%	17%	16%	18%	18%	19%	19%	19%	19%	16%	15%	18%	18%	17%	16%
On-demand clips of packaged highlights	20%	18%	27%	25%	17%	16%	20%	21%	18%	17%	15%	14%	20%	20%	19%	19%	20%	18%	17%	15%	19%	17%	16%	16%
On-demand, manually skipping to parts I am interested in	16%	16%	23%	23%	15%	15%	17%	17%	16%	17%	14%	15%	18%	19%	16%	17%	16%	15%	15%	15%	18%	19%	16%	16%
Sample Sizes	14358	15153	3079	2785	7095	6794	6453	6483	3146	3330	2114	2004	2040	1983	4329	4247	6198	6288	4132	3938	4502	4295	9023	8428

 = Significant increase between 2025 and 2026 at 95% CI  = Significant decrease between 2025 and 2026 at 95% CI

THE NEW SPORTS CONSUMPTION LANDSCAPE

Second screens extend the live experience for fans with India leading on player/team stats, Saudi Arabia on fan interaction and the UAE on game updates

Primary Reasons for Using a Secondary Device
% selected, Among all sports fans

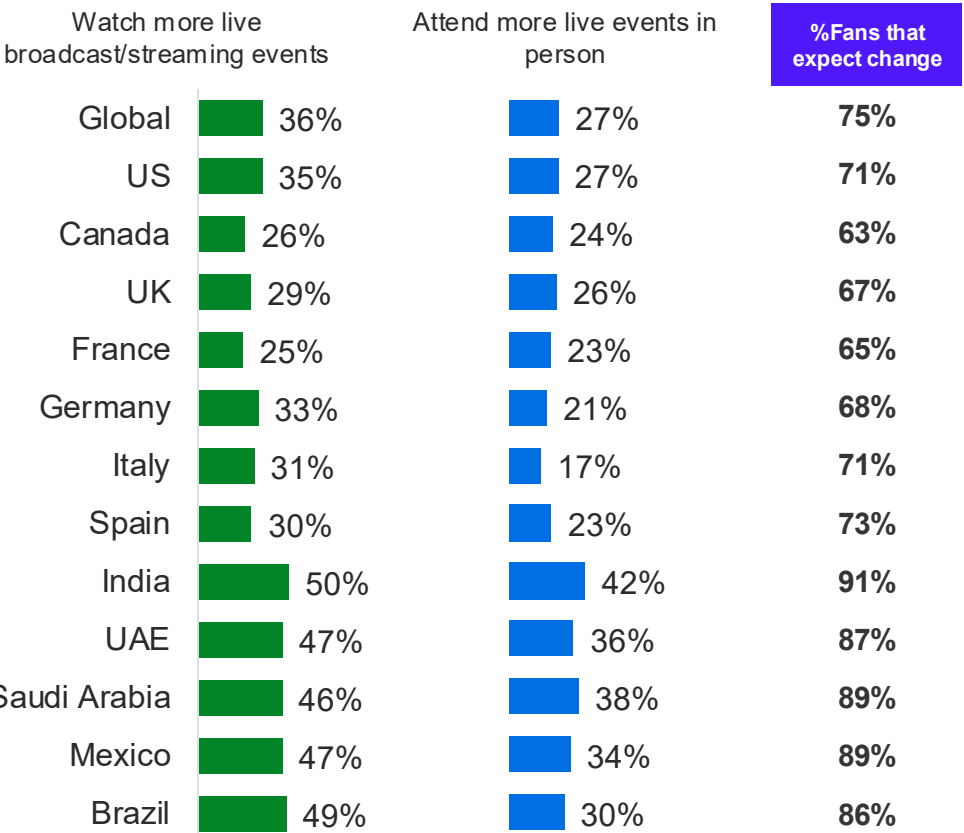
	Global	US	Canada	UK	France	Germany	Italy	Spain	India	UAE	Saudi Arabia	Mexico	Brazil
Country-Specific Priorities →	Extends live viewing	Multi-game tracking	Multitasking	Multi-game tracking	Lower engagement	Lower engagement	Multi-game tracking	Replay-focused	Data-driven	Always-on	Social-first	Replay-focused	Multi-game tracking
Game Updates	30%	38%	33%	33%	11%	27%	33%	18%	33%	42%	37%	29%	41%
Replays & Camera Angles	27%	27%	27%	24%	21%	19%	21%	29%	39%	32%	28%	38%	29%
Player/Team Stats	24%	24%	20%	20%	18%	22%	13%	21%	41%	33%	31%	28%	21%
Additional Live Analysis	23%	21%	16%	18%	15%	17%	17%	22%	35%	36%	36%	28%	30%
Fan Interaction	22%	22%	15%	18%	15%	17%	15%	18%	36%	35%	38%	24%	26%
Non-Sports Multi-Tasking	21%	19%	26%	20%	28%	17%	15%	21%	21%	20%	19%	21%	20%
No Secondary Device	20%	22%	25%	27%	31%	29%	27%	21%	6%	6%	8%	9%	12%
Fantasy Sports	11%	15%	8%	10%	6%	7%	5%	9%	23%	16%	19%	10%	6%

THE NEW SPORTS CONSUMPTION LANDSCAPE

Nearly three-quarters of fans expect their viewing habits to change, with in-person attendance as the leading change among Gen Z fans in the US, Canada, UK, France, and Saudi Arabia

Top 2 Anticipated Changes in Sports Viewing Habits in the Next 2-3 Years

% selected, Among all sports fans



Top Anticipated Change in Sports Viewing Habits by 2027

Top response, Among all sports fans

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Watch live – 42%	Watch live – 41%	Watch live – 34%	No Change – 52%
US	Attend Events	Watch live	Watch live	No Change
Canada	Attend Events	Watch live	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	No Change	No Change
Italy	Watch live	Watch live	Watch live	No Change
Spain	Watch live	Watch live	No Change	No Change
India	Watch live	Watch live	Watch live	Watch live
UAE	Watch live	Watch live	Watch live	On-demand
Saudi Arabia	Attend Events	Watch live	Watch live	On-demand
Mexico	Watch live	Watch live	Watch live	Watch live
Brazil	Watch live	Watch live	Watch live	Watch live

Younger sports fans are especially ready for change, with 89% of Gen Zers expecting their viewing habits to change in the next 2 to 3 years (Millennials = 84%, Gen Xers = 71%, Boomers = 48%).

Attend Events
= Attend more live events in person

Watch live
= Watch more live broadcast/streaming events

On-demand
= Consume more on-demand content

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

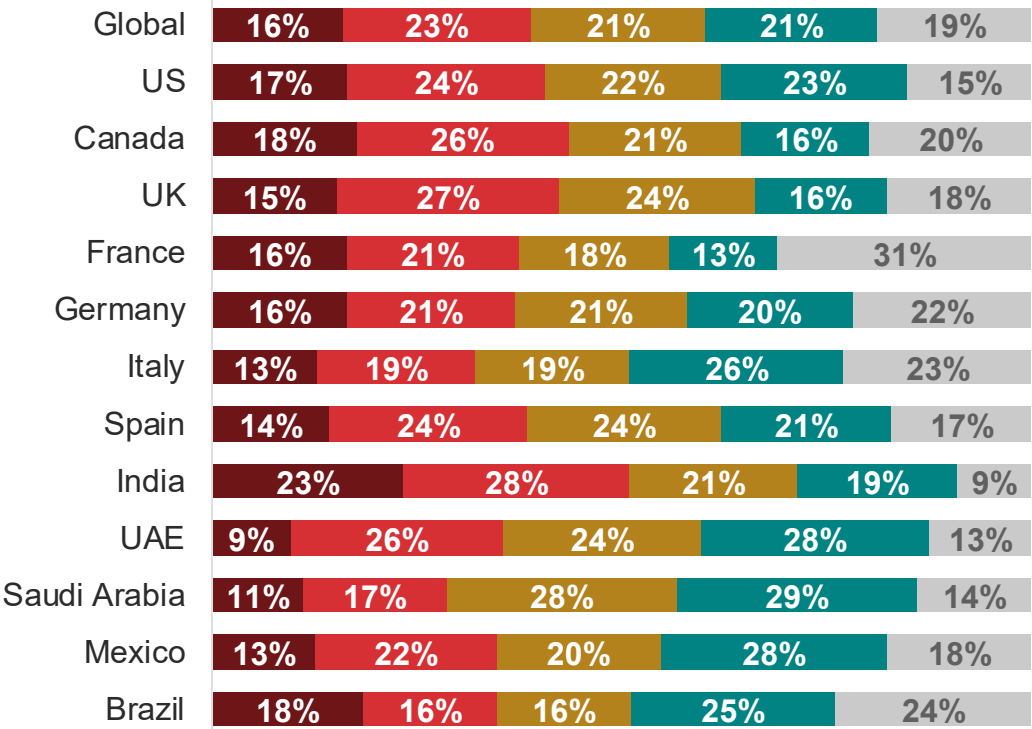
THE NEW SPORTS CONSUMPTION LANDSCAPE

Four in 10 fans report frustration with the number of subscriptions required to follow the sports they care about, with frustration highest among Gen Z

Sentiment Toward Multiple Platform Subscriptions

Among all sports fans

- Very frustrated - it's too difficult to manage
- Somewhat frustrated - it's difficult, but I manage
- Not very frustrated - it's a minor inconvenience
- Not at all frustrated - it's not inconvenient
- I do not have to access multiple platforms to watch the sporting events I care about



Sentiment Toward Multiple Platform Subscriptions

% Very frustrated + somewhat frustrated, Among all sports fans

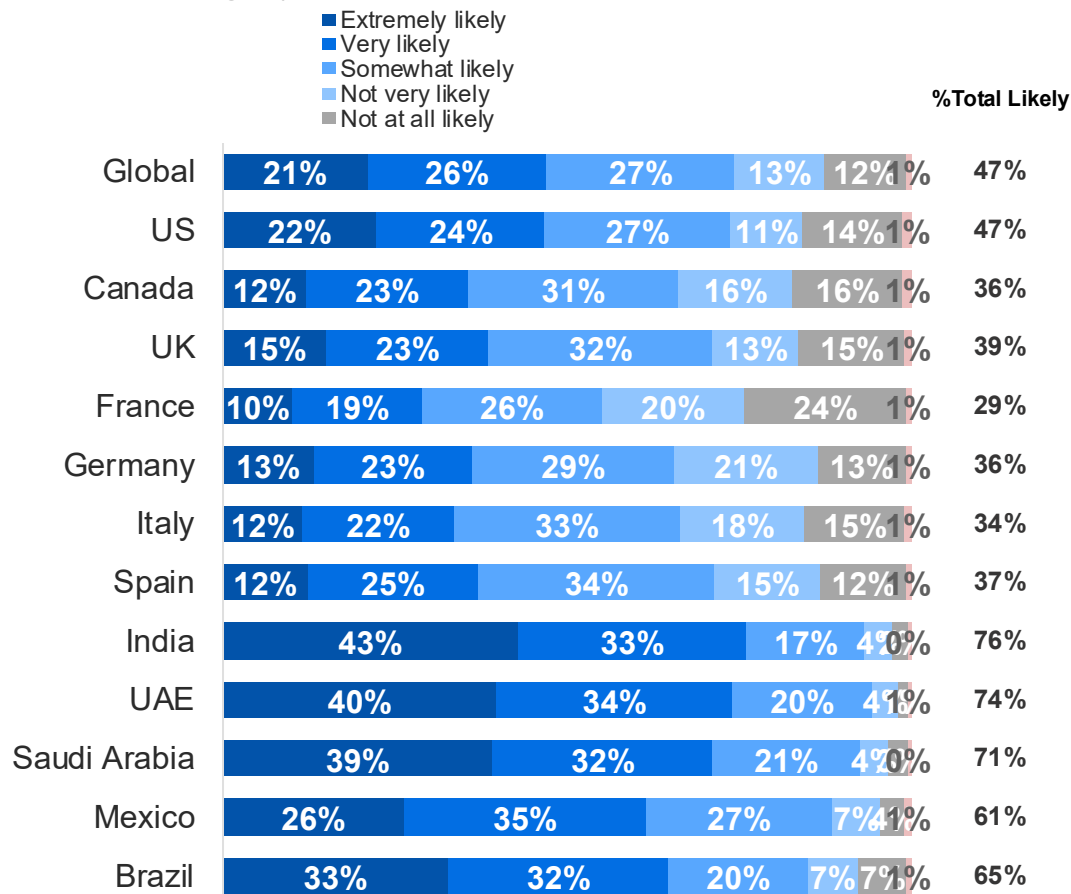
Generations	Gen Z	Millennials	Gen X	Boomers
Global	46%	39%	37%	32%
US	38%	40%	40%	44%
Canada	48%	46%	44%	38%
UK	44%	47%	44%	34%
France	49%	39%	40%	28%
Germany	41%	38%	39%	32%
Italy	48%	38%	29%	23%
Spain	50%	39%	37%	31%
India	58%	47%	43%	19%
UAE	39%	34%	37%	29%
Saudi Arabia	34%	26%	25%	50%
Mexico	39%	35%	28%	30%
Brazil	42%	34%	32%	28%

THE NEW SPORTS CONSUMPTION LANDSCAPE

A centralized sports app could attract nearly half of fans, but only 29% would pay for one, with significant variation by market

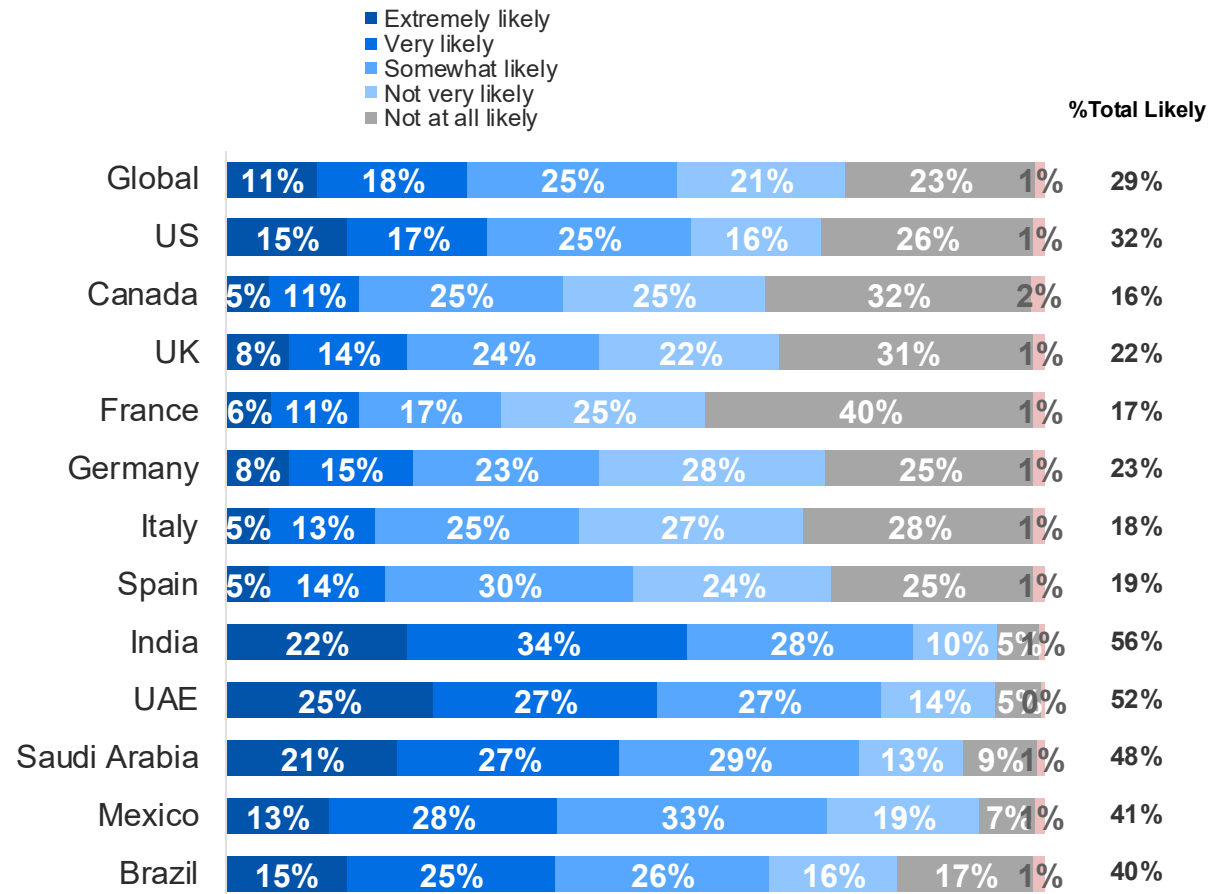
Likelihood to Download and Use Centralized App

Among all sports fans, Likelihood to 'download it and use it'



Likelihood to Subscribe and Pay for Centralized App

Among all sports fans, Likelihood to 'subscribe and pay for it'

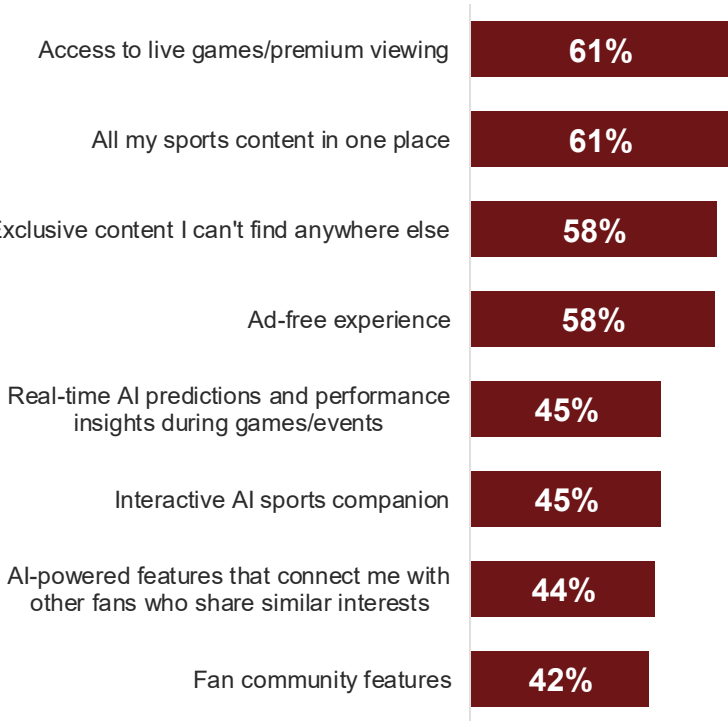


THE NEW SPORTS CONSUMPTION LANDSCAPE

Premium live viewing, all content in one place, exclusive content and ad-free viewing are the strongest subscription drivers, each influencing roughly six in 10 fans

Paid Sports App Subscription Drivers

Among all sports fans, % Major impact + moderate impact



F1, Tennis and Golf fans show somewhat greater interest than average in real-time insights and premium digital functionality. F1 fans may be especially receptive to integrated data and analysis, while Golf fans place a relatively high premium on quality and accuracy.

Paid Sports App Subscription Drivers by Market

Among all sports fans, % Major impact + moderate impact

	Live games /Premium viewing	Content in one place	Exclusive content	Ad-free	Real-time AI insights	AI companion	AI-powered connections	Community features
Global	61%	61%	58%	58%	45%	45%	44%	42%
US	56%	56%	54%	54%	42%	42%	42%	42%
Canada	51%	51%	47%	47%	30%	30%	27%	31%
UK	53%	52%	47%	47%	32%	34%	32%	32%
France	44%	43%	42%	40%	30%	31%	29%	29%
Germany	55%	53%	50%	50%	39%	39%	38%	37%
Italy	52%	51%	48%	47%	36%	33%	34%	30%
Spain	64%	64%	60%	59%	44%	43%	41%	35%
India	81%	84%	80%	82%	73%	73%	71%	69%
UAE	81%	80%	79%	80%	69%	69%	66%	67%
Saudi Arabia	79%	78%	76%	74%	63%	68%	66%	65%
Mexico	76%	77%	75%	73%	57%	55%	55%	51%
Brazil	73%	74%	70%	69%	54%	53%	50%	46%

SECTION 3

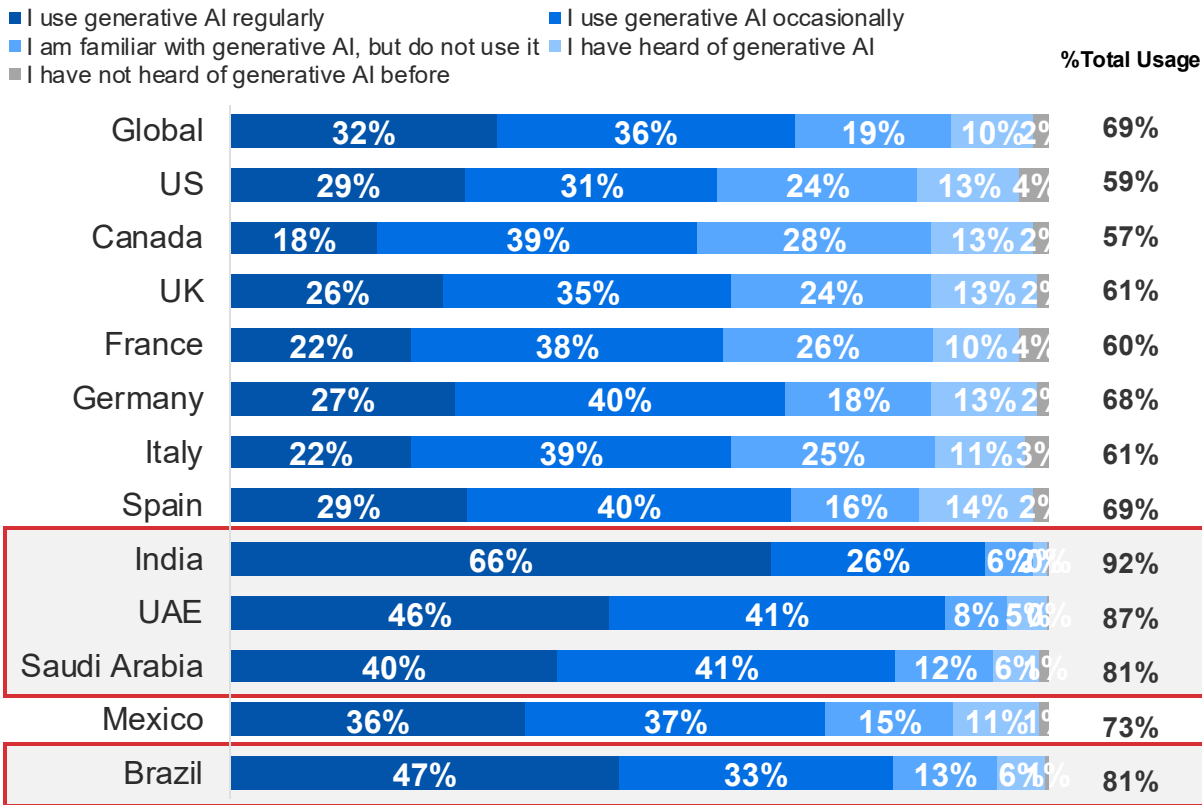
An AI-Powered Fan Experience

AN AI-POWERED FAN EXPERIENCE

Generative AI is already mainstream among sports fans, especially among Gen Z, with 69% using it regularly or occasionally and usage exceeding 90% in India

Familiarity with AI

Among all sports fans



AI Usage

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

Generations	Gen Z	Millennials	Gen X	Boomers
Global	80%	77%	66%	47%
US	68%	71%	61%	39%
Canada	70%	67%	55%	39%
UK	71%	75%	61%	38%
France	77%	65%	61%	46%
Germany	74%	73%	67%	59%
Italy	80%	71%	60%	45%
Spain	75%	77%	67%	50%
India	93%	93%	87%	91%
UAE	84%	87%	93%	71%
Saudi Arabia	82%	82%	79%	75%
Mexico	77%	74%	65%	67%
Brazil	90%	87%	71%	61%

AN AI-POWERED FAN EXPERIENCE

AI use surged across every market over the last year, including gains of at least 20 points in France, Italy, Spain, Saudi Arabia and Mexico

2025 vs. 2026: Familiarity with AI
% selected, Among all sports fans

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA		MEXICO		BRAZIL	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
I use generative AI regularly	17%	29%	15%	18%	16%	26%	12%	22%	21%	27%	10%	22%	14%	29%	52%	66%	33%	46%	25%	40%	20%	36%	35%	47%
I use generative AI occasionally	26%	31%	28%	39%	30%	35%	26%	38%	37%	40%	29%	39%	29%	40%	27%	26%	38%	41%	33%	41%	28%	37%	27%	33%
NET: Total AI Usage	43%	59%	43%	57%	47%	61%	38%	60%	58%	68%	39%	61%	43%	69%	80%	92%	71%	87%	59%	81%	48%	73%	62%	81%
I am familiar with generative AI, but do not use it	27%	24%	27%	28%	25%	24%	27%	26%	19%	18%	29%	25%	20%	16%	11%	6%	17%	8%	22%	12%	19%	15%	19%	13%
I have heard of generative AI	21%	13%	23%	13%	23%	13%	21%	10%	19%	13%	22%	11%	25%	14%	6%	2%	8%	5%	12%	6%	21%	11%	12%	6%
I have not heard of generative AI before	9%	4%	7%	2%	6%	2%	14%	4%	4%	2%	10%	3%	12%	2%	3%	0%	4%	0%	7%	1%	12%	1%	8%	1%
Sample Sizes	2051	2063	2039	2047	2046	2031	2043	2055	2046	2043	2036	2031	2043	2043	2209	2073	1028	1044	1048	1055	1227	1054	1048	1050

= Significant increase between 2025 and 2026 at 95% CI = Significant decrease between 2025 and 2026 at 95% CI

Fans rank real-time updates as the most desired AI capability, rated a high priority by 30% of fans aware of the technology

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	30%	26%	26%	23%	22%	20%
US	29%	27%	24%	23%	21%	21%
Canada	20%	16%	14%	14%	11%	10%
UK	22%	18%	17%	15%	14%	14%
France	18%	15%	16%	13%	11%	11%
Germany	25%	22%	20%	17%	16%	15%
Italy	20%	15%	14%	13%	14%	11%
Spain	23%	22%	22%	20%	19%	15%
India	49%	49%	47%	43%	42%	42%
UAE	45%	43%	43%	39%	38%	34%
Saudi Arabia	45%	41%	40%	38%	38%	33%
Mexico	39%	33%	33%	30%	30%	22%
Brazil	47%	40%	42%	34%	31%	26%

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.

AN AI-POWERED FAN EXPERIENCE

Real-time updates remain the leading AI priority, although high-priority ratings declined since 2025 across most features and markets

2025 vs. 2026: 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		MEXICO		BRAZIL	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
Real-Time Updates	31%	29%	25%	20%	28%	22%	23%	18%	31%	25%	24%	20%	27%	23%	56%	49%	49%	45%	46%	45%	45%	39%	54%	47%
Personalized Content	26%	27%	20%	16%	21%	18%	18%	15%	24%	22%	19%	15%	28%	22%	51%	49%	45%	42%	45%	41%	41%	33%	50%	40%
Unique Insights	26%	24%	19%	14%	19%	17%	18%	16%	25%	20%	19%	14%	27%	22%	52%	47%	42%	43%	40%	40%	39%	33%	48%	42%
Meaningful Predictions	24%	23%	17%	14%	17%	15%	15%	13%	21%	17%	16%	13%	23%	20%	49%	43%	40%	39%	39%	38%	36%	30%	43%	34%
Voice Interfaces	23%	21%	15%	11%	15%	14%	14%	11%	20%	16%	15%	14%	24%	19%	48%	42%	42%	38%	41%	38%	38%	30%	41%	31%
Engagement Opportunities	21%	21%	12%	10%	14%	14%	11%	11%	16%	15%	13%	11%	18%	15%	42%	42%	37%	34%	36%	33%	26%	22%	32%	26%
Sample Sizes	1876	1988	1896	2007	1928	1998	1762	1976	1962	2010	1823	1971	1796	1971	2152	2065	985	995	970	1042	1085	1041	967	1043

 = Significant increase between 2025 and 2026 at 95% CI  = Significant decrease between 2025 and 2026 at 95% CI

AN AI-POWERED FAN EXPERIENCE

Eight in 10 fans see value in AI-powered sports experiences, led by real-time statistics, personalized content and translation

Top 3 Most Valuable AI Features for Sports Engagement

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

	Real-time Statistical Insights	Personalized Content	Translations	Would find AI features valuable
Global	27%	26%	23%	80%
US	28%	25%	11%	70%
Canada	27%	21%	15%	68%
UK	28%	23%	12%	68%
France	18%	19%	23%	68%
Germany	24%	24%	23%	78%
Italy	23%	23%	27%	78%
Spain	20%	29%	27%	82%
India	43%	31%	26%	97%
UAE	31%	29%	28%	96%
Saudi Arabia	24%	30%	33%	94%
Mexico	29%	32%	31%	92%
Brazil	35%	34%	30%	91%

Younger sports fans are most likely find AI features valuable (Gen Zers = 92%, Millennials = 88%, Gen Xers = 78%, Boomers = 54%)

Most Valuable AI Feature for Sports Engagement

Top response, Among all sports fans

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Stats – 32%	Stats – 30%	Stats – 25%	Stats – 19%
US	Stats	Personal	Stats	Stats
Canada	Stats	Stats	Stats	Stats
UK	Stats	Stats	Stats	Stats
France	Personal	Translations	Translations	Translations
Germany	Personal	Stats	Stats	Translations
Italy	Personal	Translations	Translations	Stats
Spain	Personal	Personal	Personal	Highlights
India	Stats	Stats	Stats	*Stats *Highlights
UAE	Stats	Stats	Translations	Virtual assistants
Saudi Arabia	Translations	Personal	Translations	Translations
Mexico	Personal	Personal	Personal	Translations
Brazil	Stats	Personal	Stats	Stats

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

Virtual assistants

= Virtual assistants that can answer questions about games/players

*Tied for top 1

**A higher percentage of respondents said they wouldn't find any feature valuable

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 = 20589n, US = 2063n, Canada = 2047n, UK = 2031n, France = 2055n, Germany = 2043n, Italy = 2031n, Spain = 2043n, India = 2073n, UAE = 1044n, Saudi Arabia = 1055n, Mexico = 1054n, Brazil = 1050n

AN AI-POWERED FAN EXPERIENCE

Fans want faster, more personalized digital experiences, with 63% seeking quicker recaps and 60% wanting personalization

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	AI-powered features connectivity with others
Global	63%	60%	60%	51%	50%	48%	47%	45%
US	58%	59%	58%	47%	46%	46%	44%	43%
Canada	54%	52%	51%	37%	36%	37%	34%	30%
UK	52%	50%	50%	38%	39%	39%	34%	33%
France	51%	42%	45%	38%	35%	34%	30%	30%
Germany	60%	52%	51%	42%	43%	36%	41%	37%
Italy	52%	48%	49%	39%	38%	32%	36%	32%
Spain	62%	59%	60%	48%	49%	44%	41%	41%
India	80%	83%	80%	75%	77%	75%	73%	75%
UAE	83%	81%	80%	76%	73%	76%	73%	70%
Saudi Arabia	81%	78%	78%	76%	71%	76%	71%	71%
Mexico	72%	74%	74%	64%	60%	59%	64%	55%
Brazil	77%	77%	72%	65%	64%	58%	71%	55%

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

AI-powered features that connect me with other fans who share similar interests

AN AI-POWERED FAN EXPERIENCE

Real-time translation is the most anticipated technology innovation in sports viewing, selected by 34% of global fans to improve the experience

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

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

	Real-time translation for international events	AI-powered recaps and summaries	AI-powered insights and analysis I can't find anywhere else	Total % selected AI feature
Global	34%	26%	24%	80%
US	26%	27%	23%	79%
Canada	31%	27%	22%	75%
UK	27%	23%	23%	75%
France	35%	22%	16%	68%
Germany	36%	24%	27%	80%
Italy	36%	24%	21%	74%
Spain	36%	29%	23%	79%
India	34%	29%	32%	93%
UAE	33%	29%	31%	90%
Saudi Arabia	32%	29%	29%	88%
Mexico	40%	26%	26%	87%
Brazil	42%	24%	25%	87%

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

Top response, Among all sports fans

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Translations – 33%	Translations – 32%	Translations – 36%	Translations – 35%
US	Social	AI Personal	AI Insight	AI Recap
Canada	Translations	Translations	Translations	Translations
UK	Translations	Translations	Social	Translations
France	Translations	Translations	Translations	Translations
Germany	Translations	Translations	Translations	Translations
Italy	Translations	Translations	Translations	Translations
Spain	Translations	Translations	Translations	Translations
India	Translations	Translations	Translations	AI Insight
UAE	*VR *Translations	AI Insight	Translations	Translations
Saudi Arabia	Translations	Social	Social	Translations
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

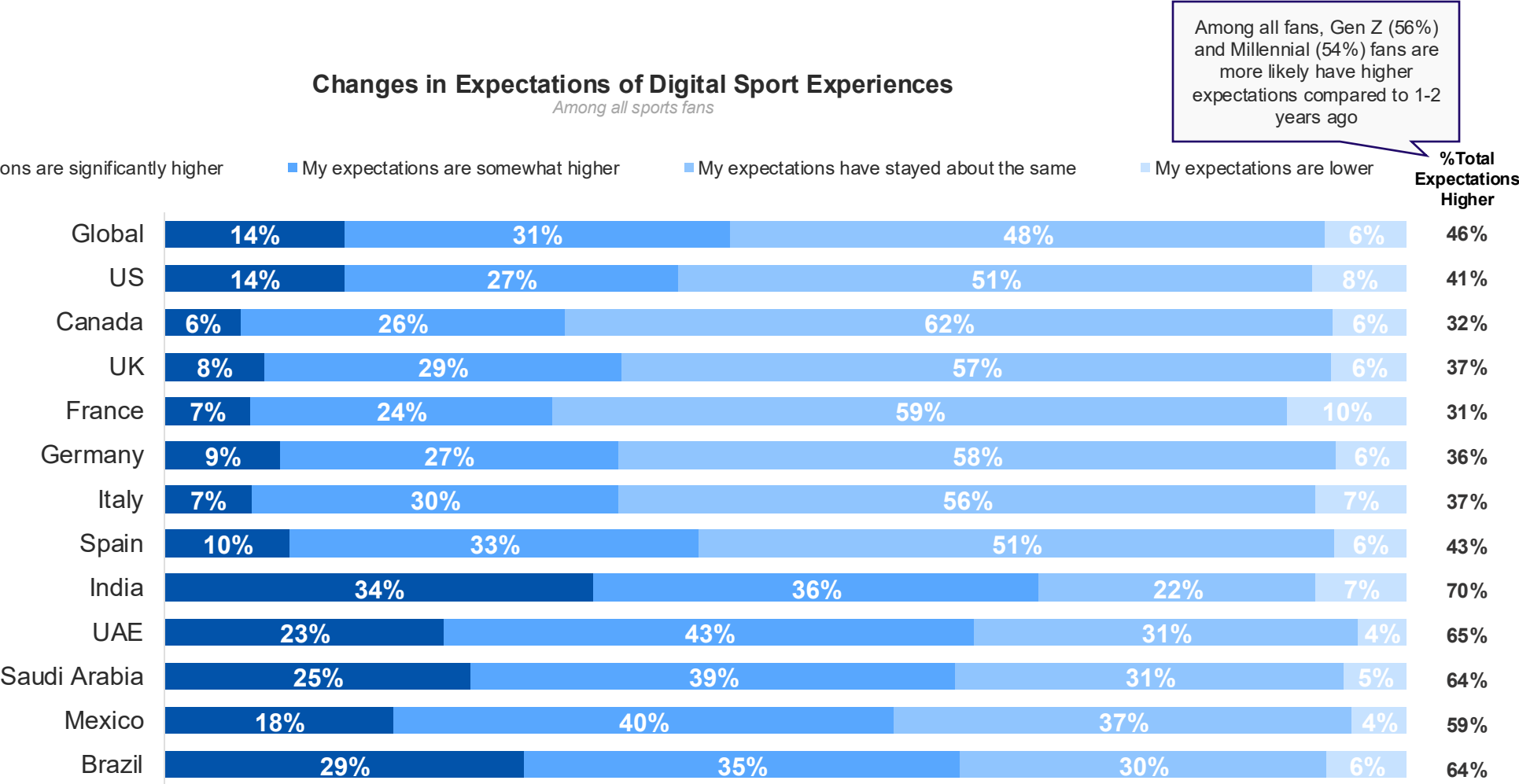
Social

= 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.

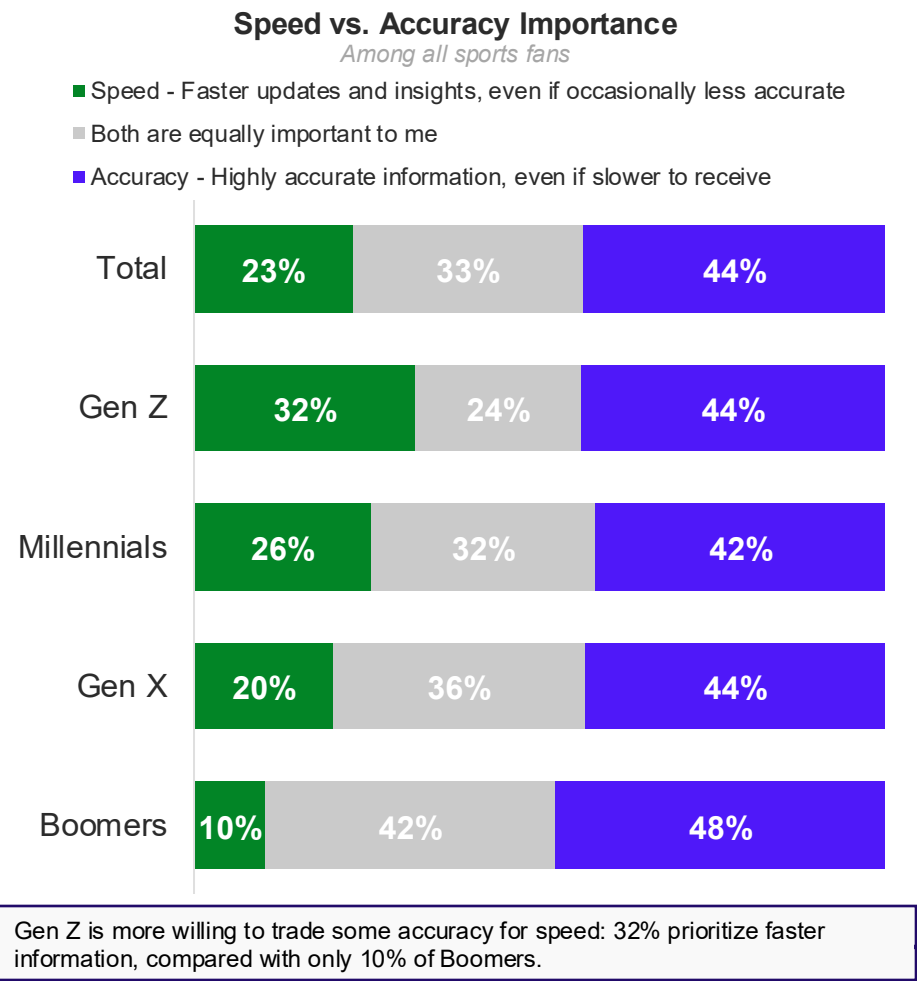
Sample Sizes: Global = 20589n, US = 2063n, Canada = 2047n, UK = 2031n, France = 2055n, Germany = 2043n, Italy = 2031n, Spain = 2043n, India = 2073n, UAE = 1044n, Saudi Arabia = 1055n, Mexico = 1054n, Brazil = 1050n

Digital sports expectations are rising for 46% of fans, especially among fans in India and Brazil



AN AI-POWERED FAN EXPERIENCE

Accuracy sets the standard for AI sports insights: 44% prioritize it over speed and 45% identify it as a key trust driver

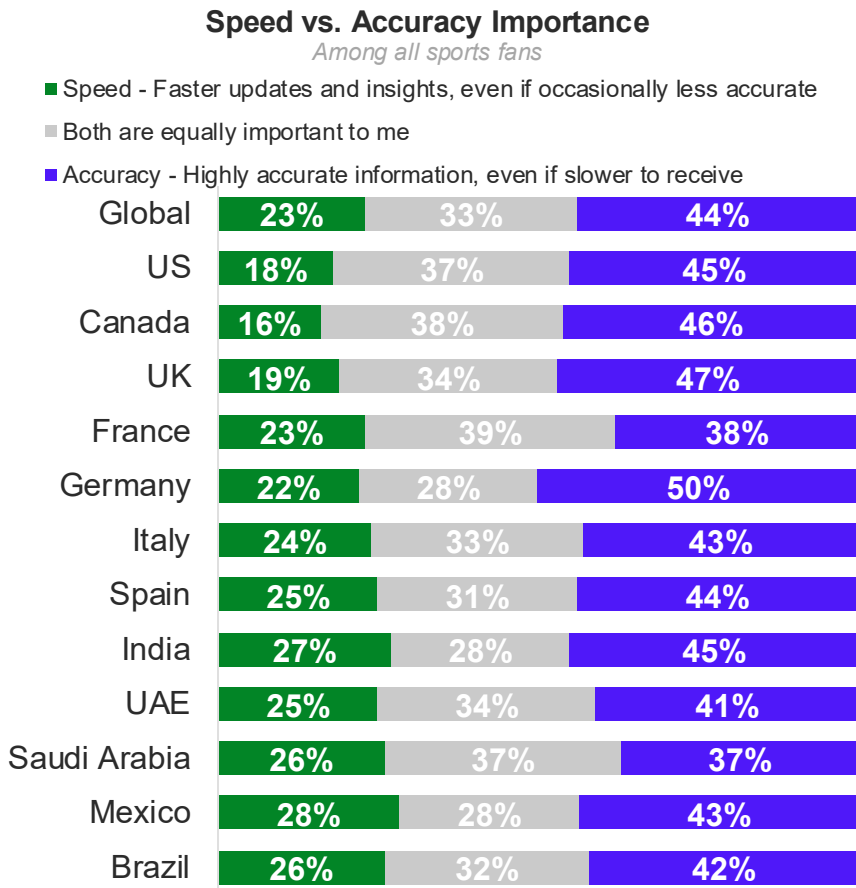


Trust Drivers for AI-powered Sports Insights
% selected, Among all sports fans

	Total	Gen Z	Millennials	Gen X	Boomers
1 Accuracy of information	45%	41%	46%	45%	48%
2 Quality of experience	41%	41%	46%	40%	33%
3 Transparency in how AI is being used	34%	35%	35%	33%	31%
4 Reputation/brand trust	31%	32%	34%	31%	26%
5 Partnerships with sports organizations	19%	23%	23%	18%	11%
Other	4%	1%	2%	5%	11%

Golf fans are especially accuracy-oriented, with 47% prioritizing accuracy and 51% identifying accuracy as a driver of trust in AI providers.

Accuracy beats speed in every country, peaking at 50% in Germany



Mexico is more willing to trade some accuracy for speed: 28% prioritize faster information compared to only 18% in the US.

Trust Drivers for AI-powered Sports Insights
% selected, Among all sports fans

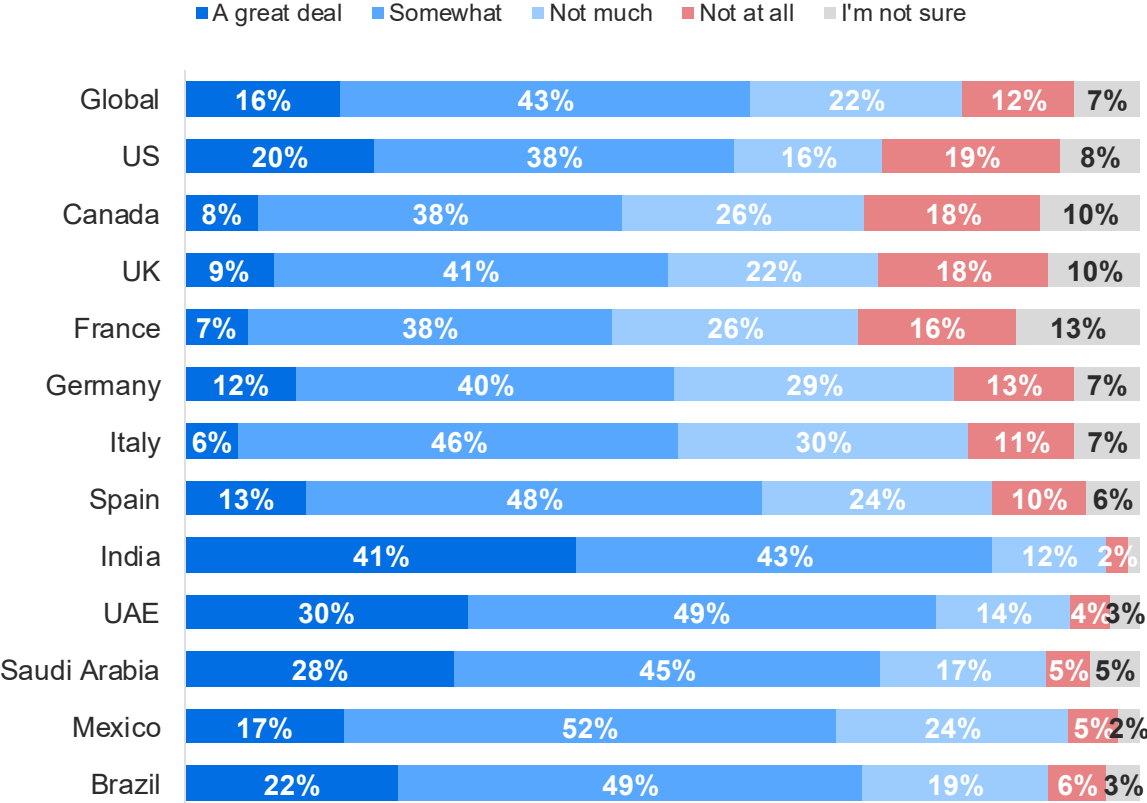
	1. Accuracy	2. Quality	3. Transparency	4. Trust	5. Partnerships
Global	45%	41%	34%	31%	19%
US	47%	41%	34%	34%	19%
Canada	51%	39%	33%	31%	16%
UK	47%	39%	33%	33%	15%
France	36%	34%	29%	24%	14%
Germany	46%	42%	35%	20%	15%
Italy	38%	37%	26%	25%	16%
Spain	38%	34%	31%	26%	19%
India	54%	52%	41%	41%	30%
UAE	55%	48%	39%	47%	29%
Saudi Arabia	48%	50%	35%	43%	27%
Mexico	37%	39%	34%	30%	19%
Brazil	45%	40%	38%	34%	19%

Canada is especially accuracy-oriented, with 46% prioritizing accuracy and 51% identifying accuracy as a driver of trust in AI providers.

AN AI-POWERED FAN EXPERIENCE

Six in 10 fans trust AI-generated sports content, with trust highest among younger fans and in India, the UAE and Saudi Arabia

Trust in AI-Generated Sports Content
Among all sports fans



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

Generations	Gen Z	Millennials	Gen X	Boomers
Global	66%	68%	58%	40%
US	69%	70%	57%	36%
Canada	57%	52%	43%	34%
UK	63%	63%	47%	33%
France	52%	49%	46%	38%
Germany	60%	57%	51%	40%
Italy	53%	56%	54%	45%
Spain	63%	64%	63%	48%
India	81%	89%	84%	79%
UAE	70%	82%	80%	79%
Saudi Arabia	69%	75%	73%	83%
Mexico	62%	70%	75%	65%
Brazil	66%	77%	70%	62%

Gen Z and Millennials are substantially more trusting of AI-generated sports content than Boomers

Trust in AI-generated sports content is also higher among Tennis fans (64%), Golf fans (64%) and F1 fans (66%) than among the global fan population (59%).

AN AI-POWERED FAN EXPERIENCE

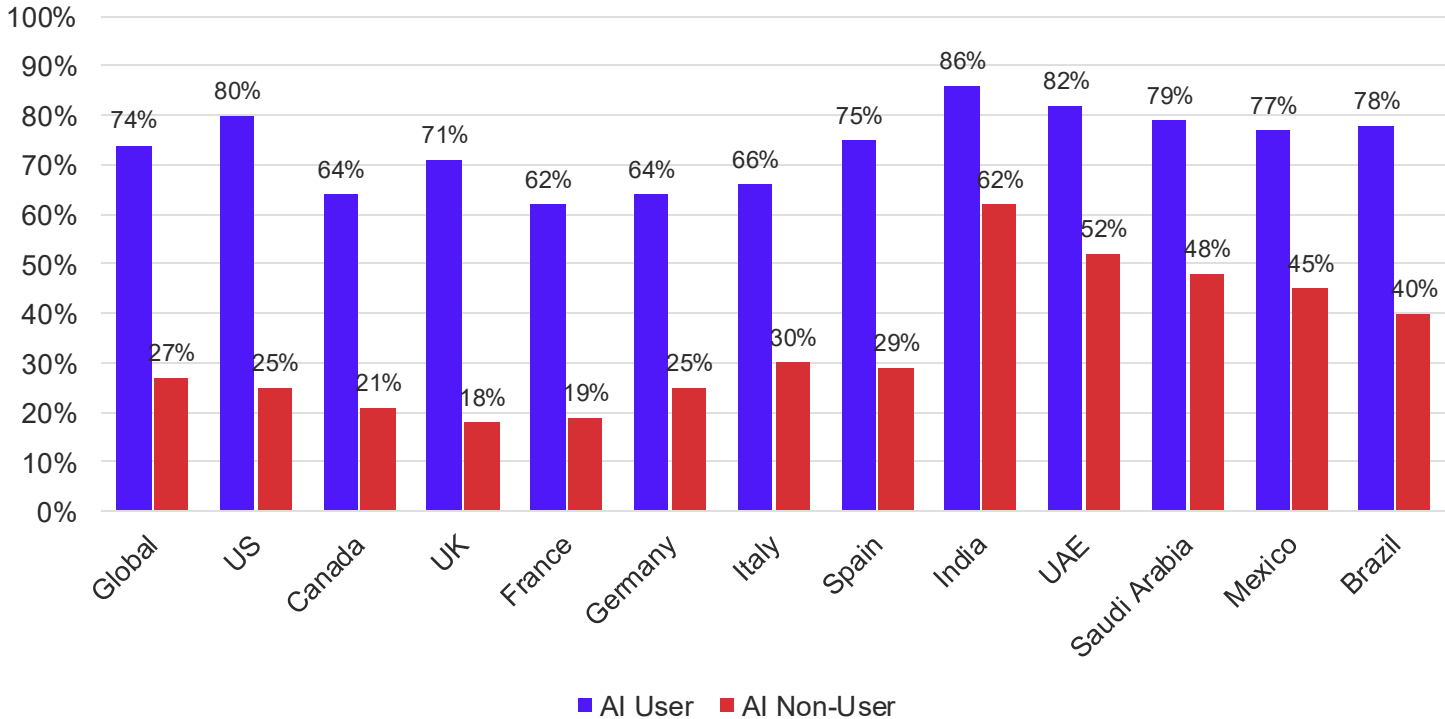
AI has crossed into mainstream sports fandom, with AI usage continuing to increase even as trust declines

	Trust in AI-Generated Sports Content	Use of AI
Global	59% ▼	69% ▲
US	57%	59% ▲
Canada	46% ▼	57% ▲
UK	51%	61% ▲
France	45% ▼	60% ▲
Germany	51% ▼	68% ▲
Italy	52%	61% ▲
Spain	60% ▼	68% ▲
India	85% ▼	92% ▲
UAE	79%	87% ▲
Saudi Arabia	73% ▼	81% ▲
Mexico	68%	73% ▲
Brazil	71% ▼	81% ▲

▲ ▼ Significant increase/decrease between 2025 and 2026 at 95% CI

Usage of AI increased across all generations. Gen Z sports fans are the most likely to be using AI (80%), followed by Millennials (77%). However, trust also universally declined.

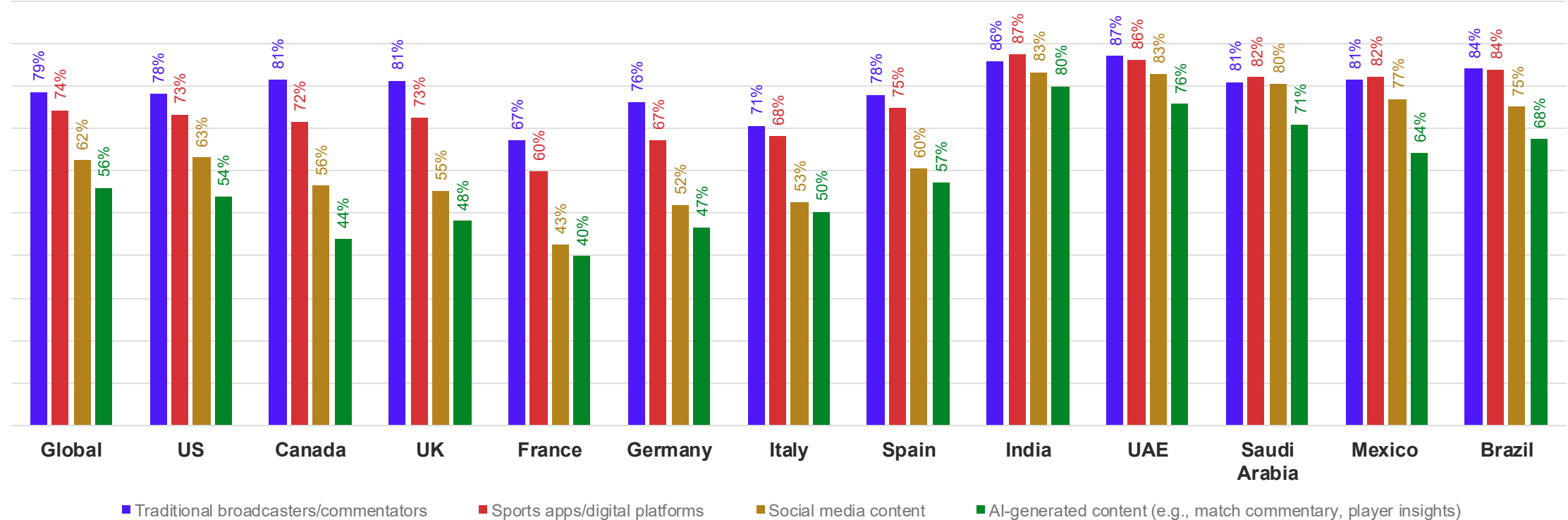
Trust in AI-generated Sports Content Sources
% a great deal + somewhat, Among all sports fans



AN AI-POWERED FAN EXPERIENCE

While traditional broadcasters remain the trust benchmark, sports apps emerge as a reliable source of information, earning the trust of 74% of fans

Most Trusted Sources – for Accurate/Reliable Information
Among all sports fans, %A great deal + somewhat



SECTION 4

Sports Apps Becoming the Home of Fandom

SPORTS APPS BECOMING THE HOME OF FANDOM

Sports apps are already used by 72% of fans, led by social sports platforms at 33% and live-streaming apps at 31%

Types of Mobile Sports Apps Used

% selected, Among all sports fans

	Sports social media platforms	Live streaming apps	Sports news & editorial aggregator	Official team apps	Official league apps	Sports analytics / stats app	Fantasy sports app	Total Using Sports Apps
Global	33%	31%	21%	20%	20%	15%	11%	72%
US	27%	26%	28%	19%	39%	15%	16%	73%
Canada	24%	24%	20%	17%	27%	11%	8%	65%
UK	30%	27%	33%	24%	15%	13%	12%	71%
France	23%	21%	6%	18%	12%	11%	4%	56%
Germany	29%	21%	9%	20%	15%	13%	7%	63% ▼
Italy	26%	23%	7%	14%	8%	10%	6%	59%
Spain	29%	30%	9%	22%	16%	16%	7%	70%
India	47%	55%	36%	23%	25%	25%	24%	93% ▲
UAE	49%	46%	33%	23%	24%	19%	16%	91%
Saudi Arabia	51%	45%	28%	25%	17%	20%	17%	89%
Mexico	42%	34%	27%	19%	27%	20%	7%	84%
Brazil	42%	43%	27%	18%	16%	16%	5%	78% ▼

▲ ▼ Significant increase/decrease between 2025 and 2026 at 95% CI

Most Popular Type of Mobile Sports App

Top response, Among all sports fans

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Social – 41%	Social – 40%	Social – 29%	Live – 18%
US	League	League	League	League
Canada	Social	League	League	League
UK	Social	Social	News	News
France	Social	Social	Live	Live
Germany	Social	Social	Social	*Live *Social
Italy	Live	Live	Social	Social
Spain	Social	Social	Live	Live
India	Live	Live	Live	Live
UAE	Social	Social	Social	Social
Saudi Arabia	Social	Social	Live	Live
Mexico	Social	Social	Social	Live
Brazil	Live	Live	Live	Social

*Tied for top 1

Younger fans engage with a wider variety of app types, particularly sports social platforms and streaming apps.

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

SPORTS APPS BECOMING THE HOME OF FANDOM

Golf fans lead the pack in sports app adoption, with 8 in 10 using at least one type

Types of Mobile Sports Apps Used (Across Key Sports)

% selected, Among all sports fans

	Sports social media platforms	Live streaming apps	Sports news & editorial aggregator	Official team apps	Official league apps	Sports analytics / stats app	Fantasy sports app	Total Using Sports Apps
Golf Fans	36%	36%	38%	29%	35%	23%	20%	80%
American Football Fans	35%	34%	32%	25%	40%	20%	17%	79%
F1 Racing Fans	38%	39%	27%	26%	26%	20%	13%	78%
Tennis Fans	35%	35%	24%	24%	22%	19%	12%	73%

SPORTS APPS BECOMING THE HOME OF FANDOM

Golf fans rank among the Top 5 heaviest sports app users, especially sports news and editorial aggregator apps

Types of Mobile Sports Apps Used (All Sports)

% selected, Among all sports fans

		Sports social media platforms	Live streaming apps specific for sports	Sports news & editorial aggregator (ESPN, Bleacher report, BBC Sport)	Official team apps	Official league apps (NFL, NBA, MLB)	Sports analytics/ stats app	Fantasy sports app	Total Using Sports Apps
rank	Global	33%	31%	21%	20%	20%	15%	11%	72%
1	Cricket Fans	44%	50%	39%	27%	25%	24%	23%	89%
2	Basketball Fans	38%	38%	29%	26%	36%	21%	16%	83%
3	Golf Fans	36%	36%	38%	29%	35%	23%	20%	80%
4	American Football Fans	35%	34%	32%	25%	40%	19%	17%	79%
5	Baseball Fans	33%	31%	31%	25%	41%	20%	17%	78%
6	F1 Racing Fans	38%	39%	27%	26%	26%	20%	13%	78%
7	Swimming Fans	38%	35%	26%	24%	24%	18%	14%	76%
8	Soccer Fans	36%	34%	22%	22%	20%	17%	11%	75%
9	Tennis Fans	35%	35%	24%	24%	22%	19%	12%	73%
10	Rugby Fans	29%	31%	27%	25%	21%	18%	13%	69%
11	Olympics Fans	32%	32%	23%	21%	21%	15%	10%	68%
12	Track and Field Fans	32%	32%	22%	22%	20%	16%	10%	67%

IBM27 What types of sports mobile apps do you currently use? Select all that apply.

Sample Sizes: Soccer = 15215n, Cricket = 2795n, Tennis = 6829n, Basketball = 6511n, Baseball = 3332n, Rugby = 2009n, Golf = 1987n, American football = 4247n, F1 racing = 6329n, Track and field = 3960n, Swimming = 4316n, Olympics = 8461n

Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

SPORTS APPS BECOMING THE HOME OF FANDOM

Official team apps generate the strongest year-round engagement, used continuously by 46% of their users

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	46%	42%	42%
US	51%	50%	53%
Canada	41%	41%	36%
UK	50%	41%	37%
France	40%	36%	40%
Germany	54%	43%	38%
Italy	40%	29%	31%
Spain	44%	35%	40%
India	46%	47%	42%
UAE	49%	45%	48%
Saudi Arabia	45%	43%	44%
Mexico	41%	35%	36%
Brazil	56%	46%	43%

Year-Round Use of Official Team Apps
% Year-round use of official team apps, Among those who use official team apps

Generations	Gen Z	Millennials	Gen X	Boomers
Global	43%	47%	49%	47%
US	49%	50%	57%	41%
Canada	38%	46%	37%	41%
UK	44%	41%	54%	63%
France	36%	45%	51%	26%
Germany	51%	46%	66%	54%
Italy	48%	44%	33%	40%
Spain	40%	47%	42%	48%
India	41%	50%	40%	N size too small to show
UAE	38%	51%	55%	N size too small to show
Saudi Arabia	49%	43%	43%	N size too small to show
Mexico	39%	36%	46%	67%
Brazil	56%	55%	56%	71%

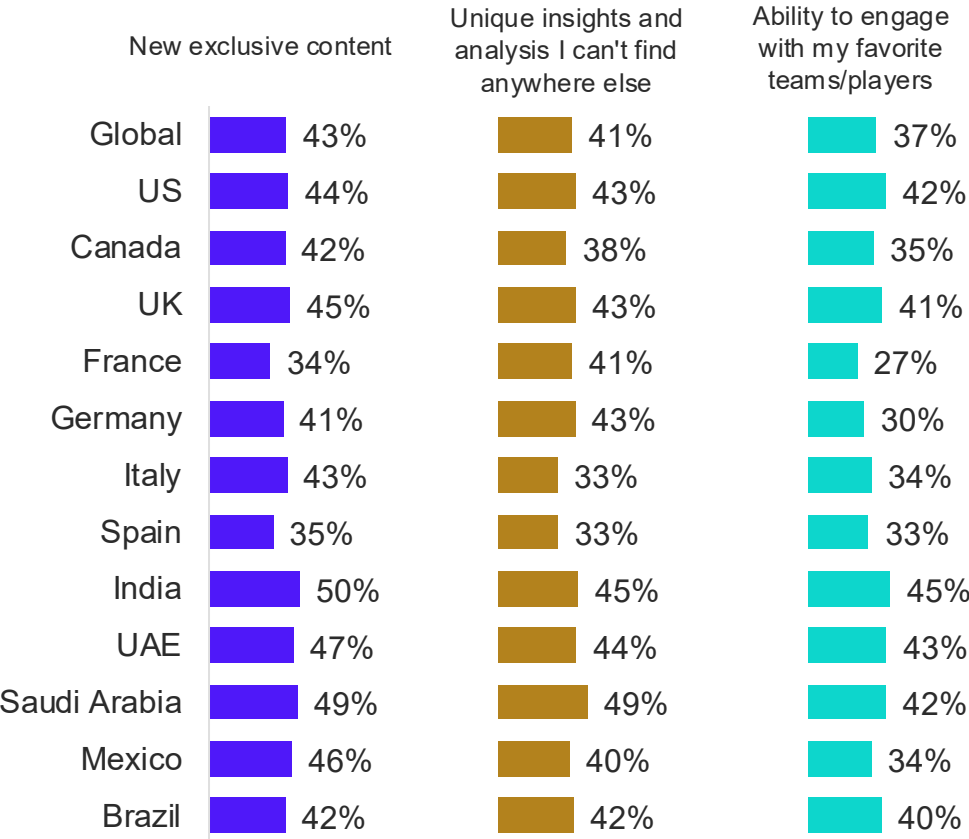
GenX are generally the most likely to use official apps throughout the year. Gen Z is somewhat more event- or season-oriented, suggesting that sustained engagement among younger users may require frequent new content and interactive reasons to return.

SPORTS APPS BECOMING THE HOME OF FANDOM

Exclusive content is the strongest year-round retention tool at 43%, closely followed by unique analysis and team analysis.

Top 3 Drivers of Year-Round Official League App Usage

% selected, Among those who use official league apps



Top Driver of Year-Round Official Team App Usage

Top response, Among those who use official team apps

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Exclusive – 39%	Exclusive – 44%	Exclusive – 44%	Analysis – 43%
US	Teams/Players	Analysis	Exclusive	Analysis
Canada	Exclusive	Exclusive	Exclusive	*Analysis *Exclusive
UK	Teams/Players	Exclusive	Exclusive	Analysis
France	Analysis	Analysis	*Analysis *Exclusive	Analysis
Germany	Personal	Exclusive	Exclusive	Analysis
Italy	Teams/Players	Exclusive	Exclusive	*Analysis *Exclusive
Spain	Teams/Players	Analysis	Exclusive	Exclusive
India	Exclusive	Exclusive	*Analysis *Exclusive	N size too small to show
UAE	Community	Exclusive	*Personal *Community	N size too small to show
Saudi Arabia	Gamification	Exclusive	Analysis	N size too small to show
Mexico	Exclusive	Exclusive	*Analysis *Exclusive	Analysis
Brazil	*Teams/Players *Community	Analysis	Exclusive	*Personal *Teams/Players *Analysis *Exclusive

*Tied for top 1

For Tennis fans, content tied to major events may be particularly effective given the sport's tournament-driven calendar.

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

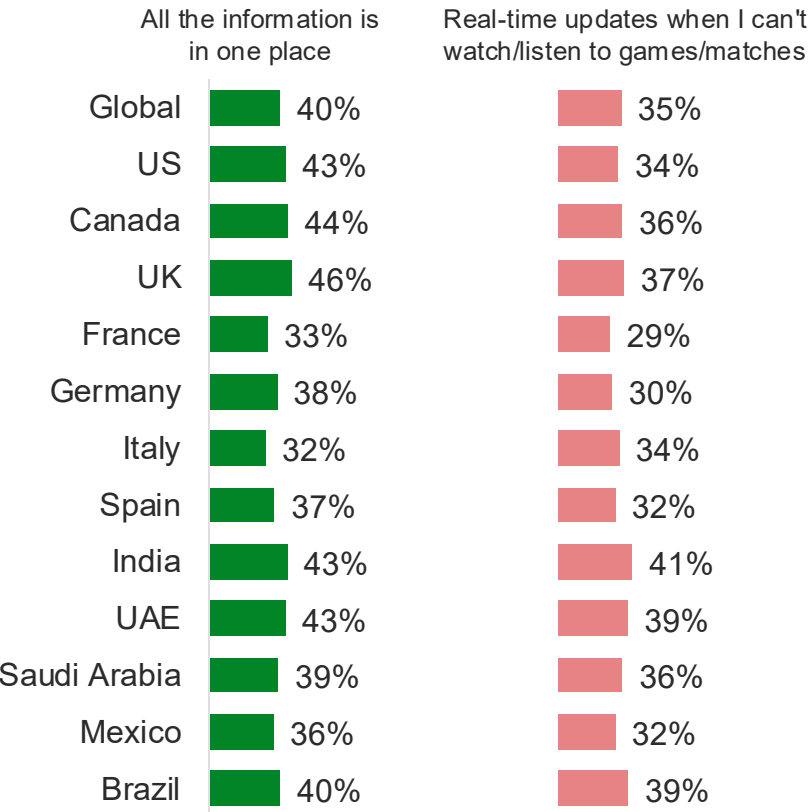
Community
= Community interaction & fan discussions

SPORTS APPS BECOMING THE HOME OF FANDOM

Sports apps win by simplifying fandom: 40% of fans value having information in one place and 35% rely on real-time updates

Top 2 Reasons for Using Sports Apps

% selected, Among sports app users



Top Reason for Using Sports Apps

Top response, Among sports app users

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Consolidation – 34%	Consolidation – 39%	Consolidation – 42%	Consolidation – 48%
US	Consolidation	Consolidation	Consolidation	Consolidation
Canada	Player Updates	Consolidation	Consolidation	Consolidation
UK	Engaging	Consolidation	Consolidation	Consolidation
France	Exclusive	Exclusive	Consolidation	Consolidation
Germany	Consolidation	Exclusive	Consolidation	Consolidation
Italy	Consolidation	Real-Time	Real-Time	Real-Time
Spain	Real-Time	Consolidation	Consolidation	Consolidation
India	Consolidation	Consolidation	Consolidation	Real-Time
UAE	Consolidation Exclusive*	Consolidation	Consolidation	Consolidation
Saudi Arabia	Personalized	Consolidation	Real-Time	Real-Time
Mexico	Exclusive	Exclusive	Consolidation	Consolidation
Brazil	Real-Time	Real-Time	Consolidation	Consolidation

*Tied for top 1

Boomers who use sports apps are more likely to emphasize the practical benefit of having all information in one place. Tennis, Golf and F1 fans generally follow the global pattern, although F1 and Golf fans tend to show slightly stronger engagement with technology-led app experiences.

Consolidation

= All the information is in one place

Real-Time

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

Engaging

= Engaging with other fans

Exclusive

= Access to exclusive content

Personalized

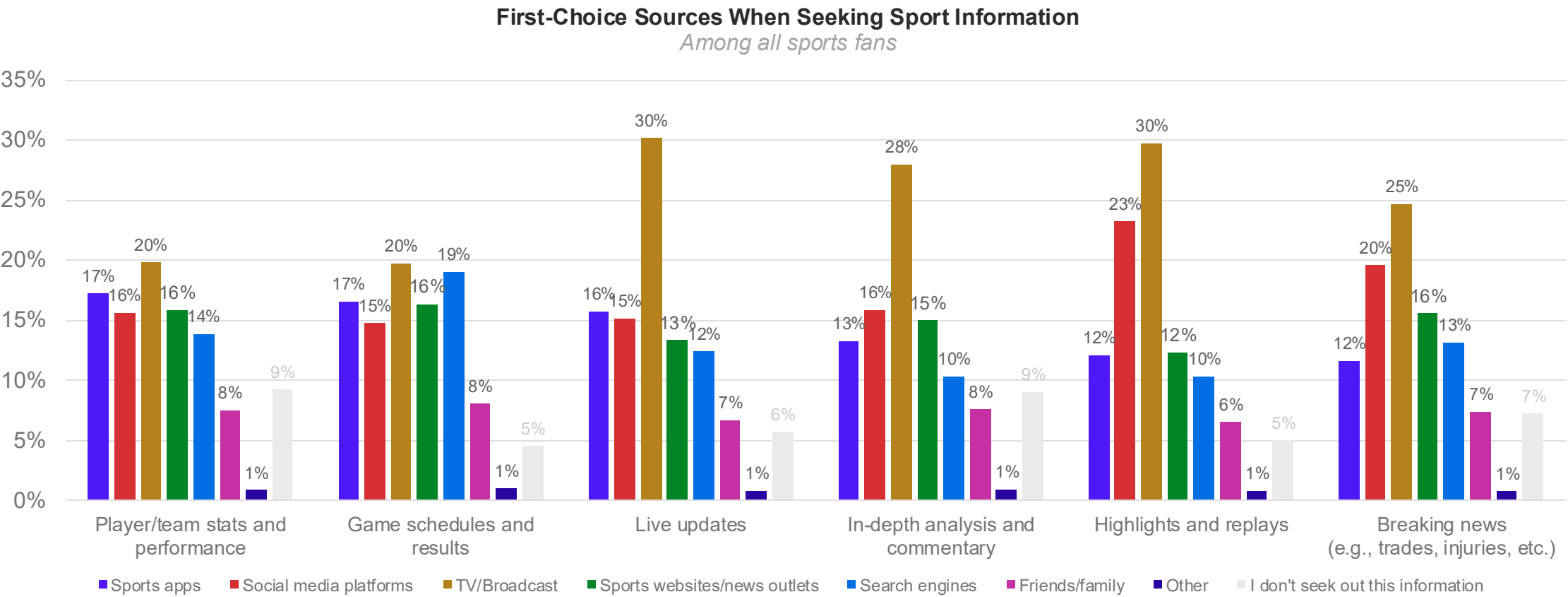
= Personalized content tailored to my interests

Player Updates

= I can follow updates on my favorite players

SPORTS APPS BECOMING THE HOME OF FANDOM

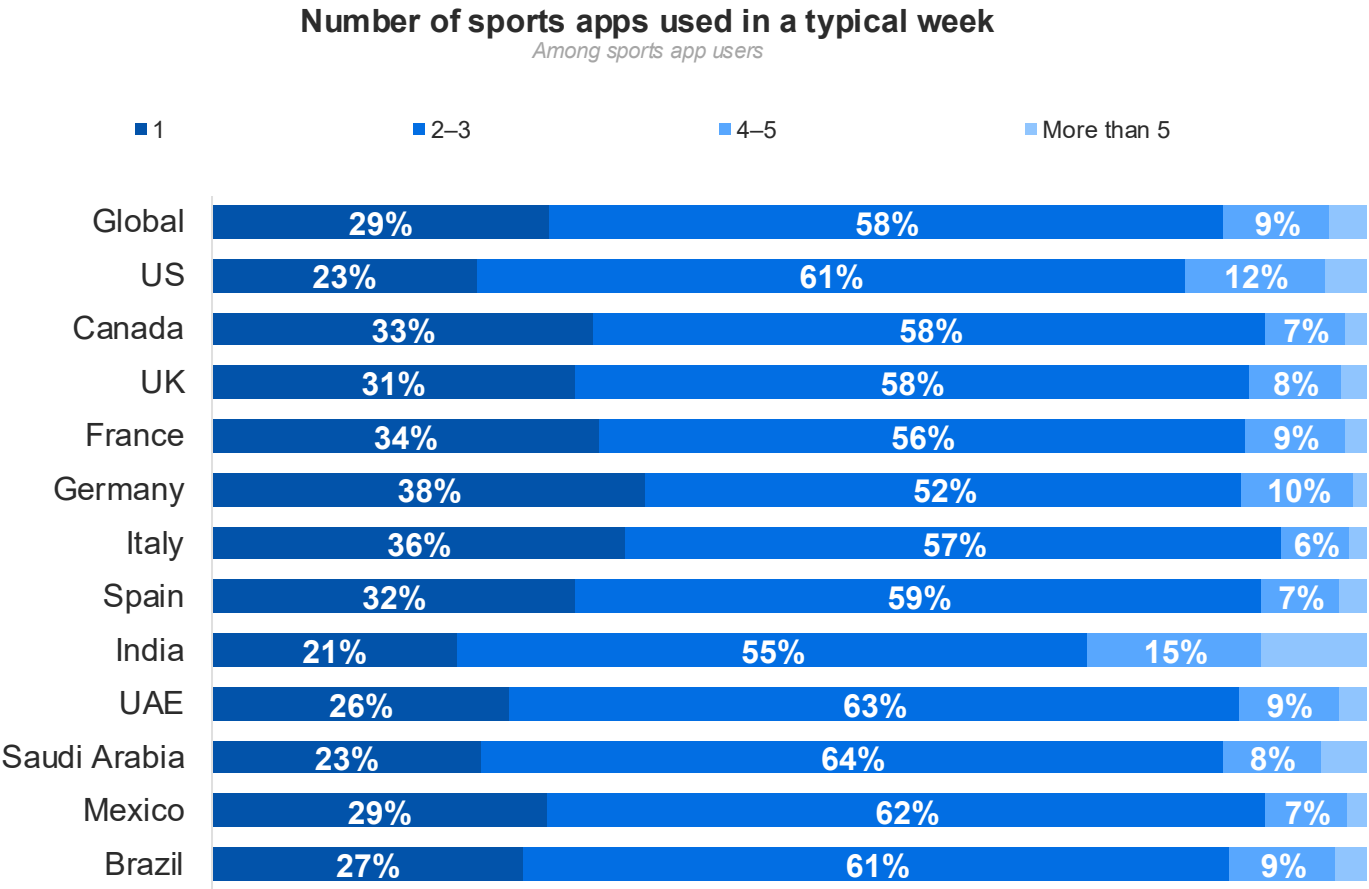
Television remains fans’ first stop for live updates, analysis and highlights, while apps and social media compete for more functional and immediate needs.



Gen Z relies heavily on social media for live updates, breaking news and highlights, while Boomers overwhelmingly favor television and broadcast. Sports apps play a more prominent role among Gen Z and Millennials than among Boomers, particularly for stats, schedules and live information. F1 fans are somewhat more digitally oriented than the global fan base, consistent with the sport’s emphasis on real-time data, technical analysis and international event coverage.

SPORTS APPS BECOMING THE HOME OF FANDOM

Most app users rely on two or three sports apps each week, while 13% use four or more and that share rises to 24% in India



SPORTS APPS BECOMING THE HOME OF FANDOM

Live statistics are the fastest-growing app feature at 30%, with growth across digital features led by India, Brazil, and the UAE

App Feature Use Changes Over the Last 1-2 Years
% selected "I use it more"

	Personalized content	Live stats and analytics	Social/community features	Fantasy sports integration	AI-driven features
Global	25%	30%	23%	15%	22%
US	25%	28%	23%	16%	20%
Canada	17%	24%	18%	10%	13%
UK	18%	26%	18%	13%	17%
France	18%	24%	15%	10%	17%
Germany	20%	24%	18%	10%	20%
Italy	18%	24%	17%	11%	19%
Spain	23%	26%	17%	11%	25%
India	36%	45%	38%	27%	34%
UAE	35%	36%	29%	19%	28%
Saudi Arabia	28%	33%	26%	20%	27%
Mexico	29%	35%	22%	15%	21%
Brazil	33%	38%	28%	13%	27%

Gen Z reports the strongest growth in personalized content, live stats and community features.

Real-time updates set the standard as sports apps deliver strong experiences across markets

App Features that Currently Meet or Exceed Expectations

% Exceeds my expectations + Meets my expectations

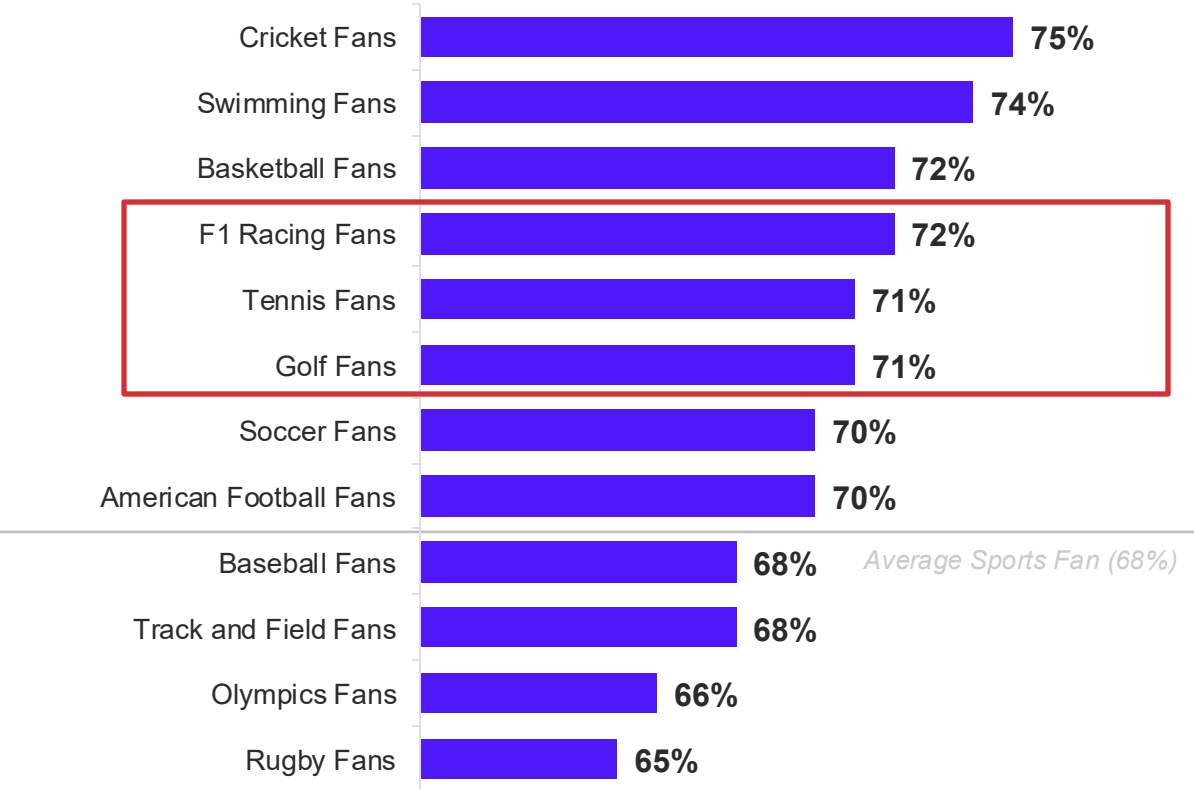
	Personalization	Real-time updates	AI-powered insights	Community features	Seamless experience across platforms
Global	83%	89%	68%	78%	83%
US	83%	88%	66%	78%	82%
Canada	80%	89%	55%	75%	82%
UK	79%	89%	61%	75%	81%
France	78%	85%	61%	71%	80%
Germany	77%	83%	65%	73%	77%
Italy	81%	90%	68%	72%	82%
Spain	83%	89%	69%	76%	84%
India	87%	91%	79%	84%	86%
UAE	88%	91%	78%	86%	87%
Saudi Arabia	86%	90%	75%	84%	88%
Mexico	87%	93%	70%	81%	88%
Brazil	86%	92%	69%	77%	88%

Expectations for digital sports experiences vary across audiences, with younger fans and F1 fans showing particularly high engagement with advanced features. AI-powered insights represent an opportunity to deepen the experience as adoption and relevance continue to grow, while strong ratings for personalization, real-time updates and cross-platform experiences provide a solid foundation for innovation.

SPORTS APPS BECOMING THE HOME OF FANDOM

Three in four Millennials agree that AI-powered insights meet or exceed expectations across the sports apps they use; F1, Tennis and Golf fans also show heightened satisfaction

AI-Powered Insights Satisfaction by Sport Fan
% Exceeds or meets my expectations, Among all sports fans



AI-Powered Insights Satisfaction by Generation
% Exceeds or meets my expectations, Among all sports fans

Generations	Gen Z	Millennials	Gen X	Boomers
Global	69%	74%	67%	49%
US	71%	73%	67%	43%
Canada	61%	62%	52%	35%
UK	71%	71%	55%	40%
France	62%	68%	63%	47%
Germany	66%	70%	66%	54%
Italy	64%	72%	70%	60%
Spain	69%	72%	69%	57%
India	75%	84%	78%	73%
UAE	66%	82%	82%	40%
Saudi Arabia	71%	75%	79%	43%
Mexico	68%	74%	66%	73%
Brazil	64%	75%	66%	61%

IBM43 Across the sports apps you currently use, how well do the following features meet your expectations?
Sample Sizes: Global = 14,864n, US = 1,506n, Canada = 1,329n, UK = 1,442n, France = 1,145n, Germany = 1,283n, Italy = 1,203n, Spain = 1,424n, India = 1,938n, UAE = 947n, Saudi Arabia = 935n, Mexico = 890n, Brazil = 822n | Sample Sizes: Soccer = 11459, Cricket = 2483n, Tennis = 6829n, Basketball = 6511n, Baseball = 3332n, Rugby = 1389n, Golf = 1582n, American football = 4247n, F1 racing = 6329n, Track and field = 3960n, Swimming = 4316n, Olympics = 8461n
Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

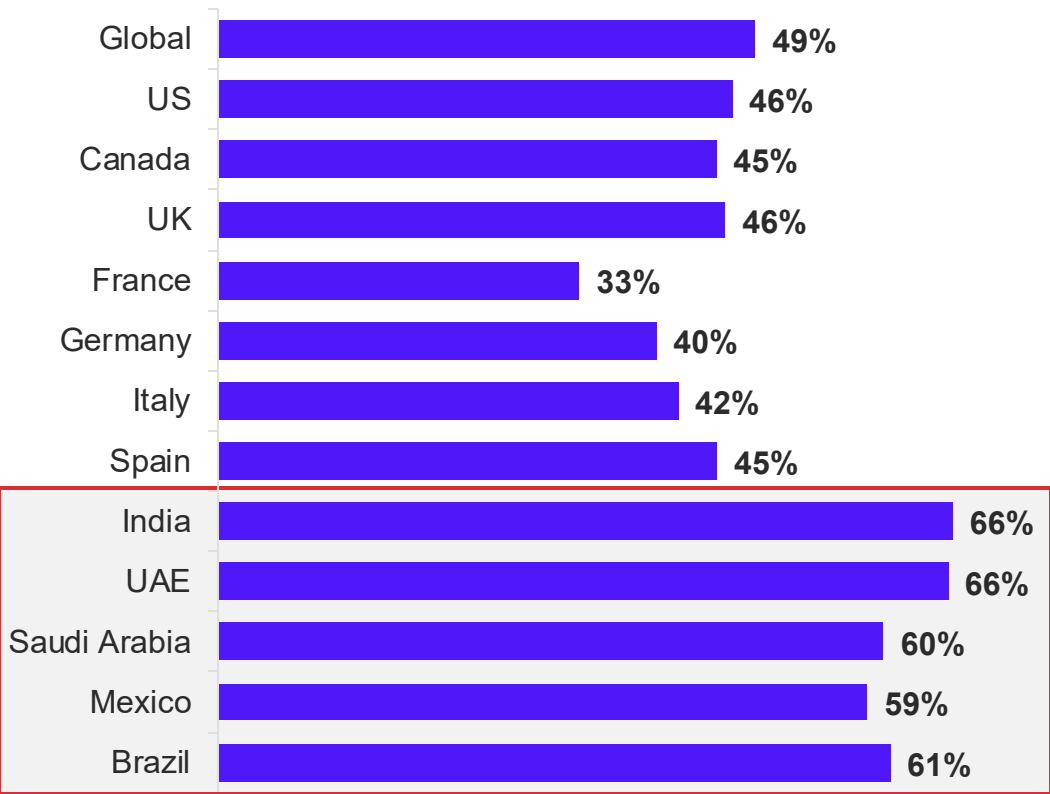
SECTION 5

Sports Creators & Social Community

SPORTS CREATORS & SOCIAL COMMUNITY

Creators are a mainstream sports touchpoint and a core part of how younger fans experience sports

Sports Fans Who Follow Sports Influencers
% selected, Among all sports fans



Sports Fans Who Follow Sports Influencers
% selected, Among all sports fans

Generations	Gen Z	Millennials	Gen X	Boomers
Global	60%	58%	45%	25%
US	59%	55%	46%	29%
Canada	57%	58%	44%	23%
UK	65%	58%	44%	21%
France	52%	44%	31%	15%
Germany	54%	52%	35%	23%
Italy	56%	49%	42%	30%
Spain	57%	54%	41%	27%
India	68%	67%	62%	60%
UAE	63%	69%	62%	57%
Saudi Arabia	53%	61%	68%	75%
Mexico	59%	63%	55%	39%
Brazil	66%	67%	55%	39%

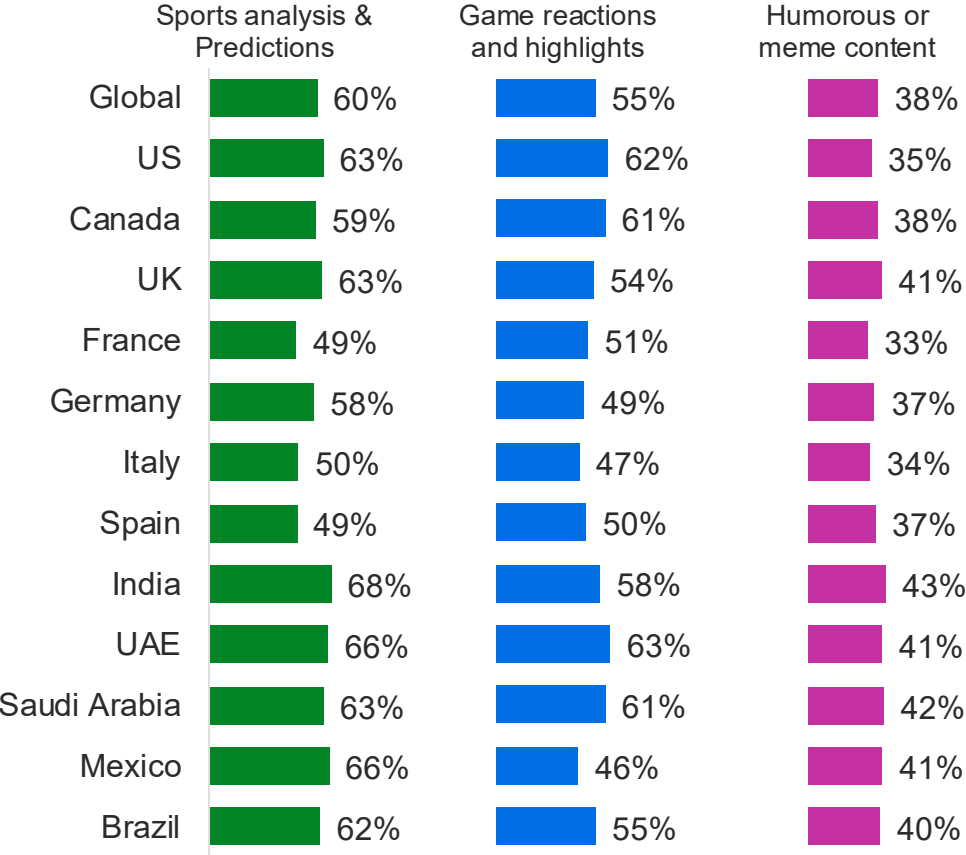
Creator-led influence is heavily concentrated among younger fans.

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 = 20589n, US = 2063n, Canada = 2047n, UK = 2031n, France = 2055n, Germany = 2043n, Italy = 2031n, Spain = 2043n, India = 2073n, UAE = 1044n, Saudi Arabia = 1055n, Mexico = 1054n, Brazil = 1050n

Sports creators are valued for depth as much as entertainment: 60% of followers seek analysis, 55% highlights and 38% humorous content

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

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Analysis – 56%	Analysis – 62%	Analysis – 61%	Analysis – 60%
US	Highlights	Highlights	Analysis	Analysis
Canada	Highlights	Analysis	Highlights	Highlights
UK	Analysis	Analysis	Analysis	Analysis
France	Highlights	Highlights	Highlights	Highlights
Germany	Analysis	Highlights	Analysis	Highlights
Italy	Analysis	Highlights	Analysis	Analysis
Spain	Highlights	Highlights	Analysis	Analysis
India	Analysis	Analysis	Analysis	Analysis
UAE	Highlights	Analysis	Highlights	N size too small to show
Saudi Arabia	Analysis	Analysis	Analysis	N size too small to show
Mexico	Analysis	Analysis	Analysis	N size too small to show
Brazil	Analysis	Analysis	Analysis	N size too small to show

*Tied for top response

Golf fans show particularly strong interest in sports analysis and predictions (67%) and are somewhat more receptive to exclusive merchandise and personalized recommendations.

Analysis
= Sports analysis & predictions

Highlights
= Game reactions and highlights

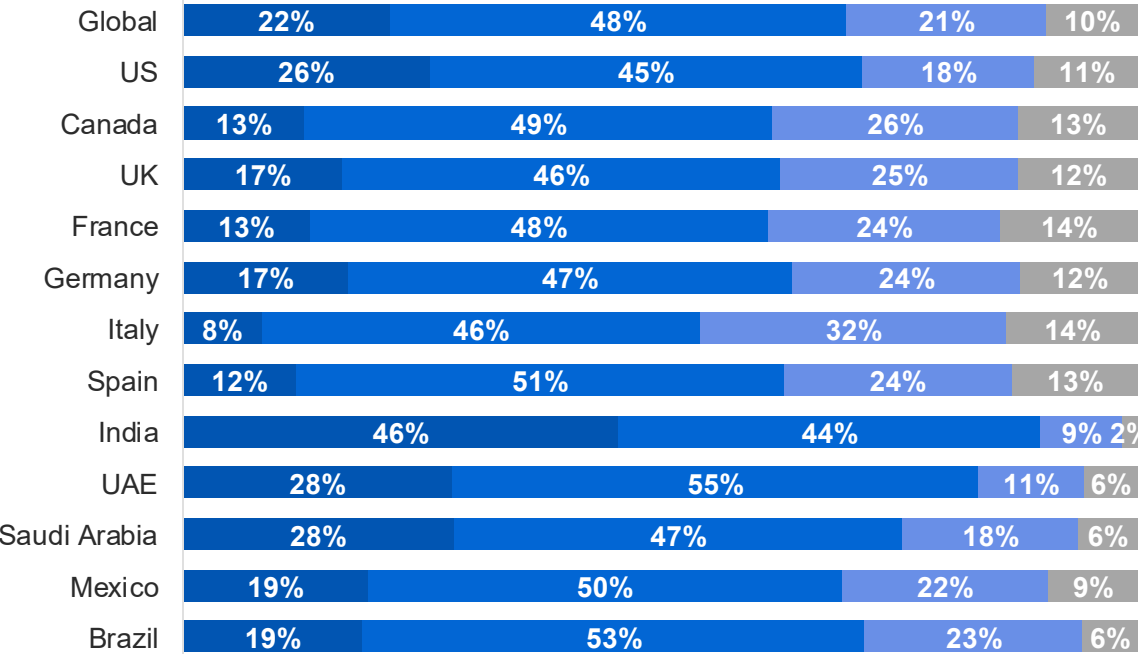
SPORTS CREATORS & SOCIAL COMMUNITY

Seven in 10 followers discover lifestyle trends through sports creators, including 22% who say creators influence many aspects of their lives

Impact of Sports Influencers on Fans' Lifestyle

Among those who follow sports influencers

- A great deal – they influence many aspects of my lifestyle
- Somewhat – I discover new trends or products through them
- A little – I notice it but don't act on it
- Not at all – I only follow them for sports-related content



Share of Fans Greatly Influenced by Sports Influencers Beyond Sports

% a great deal, Among those who follow sports influencers

Generations	Gen Z	Millennials	Gen X	Boomers
Global	27%	25%	16%	6%
US	32%	32%	25%	7%
Canada	20%	17%	6%	1%
UK	19%	24%	11%	1%
France	19%	16%	9%	4%
Germany	24%	20%	12%	10%
Italy	15%	9%	8%	3%
Spain	15%	11%	11%	8%
India	43%	51%	41%	31%
UAE	30%	29%	24%	N size too small to show
Saudi Arabia	31%	31%	21%	N size too small to show
Mexico	22%	19%	18%	N size too small to show
Brazil	26%	18%	16%	N size too small to show

F1 fans are especially creator-engaged: 58% follow sports creators and 72% say creators influence interests beyond sports.

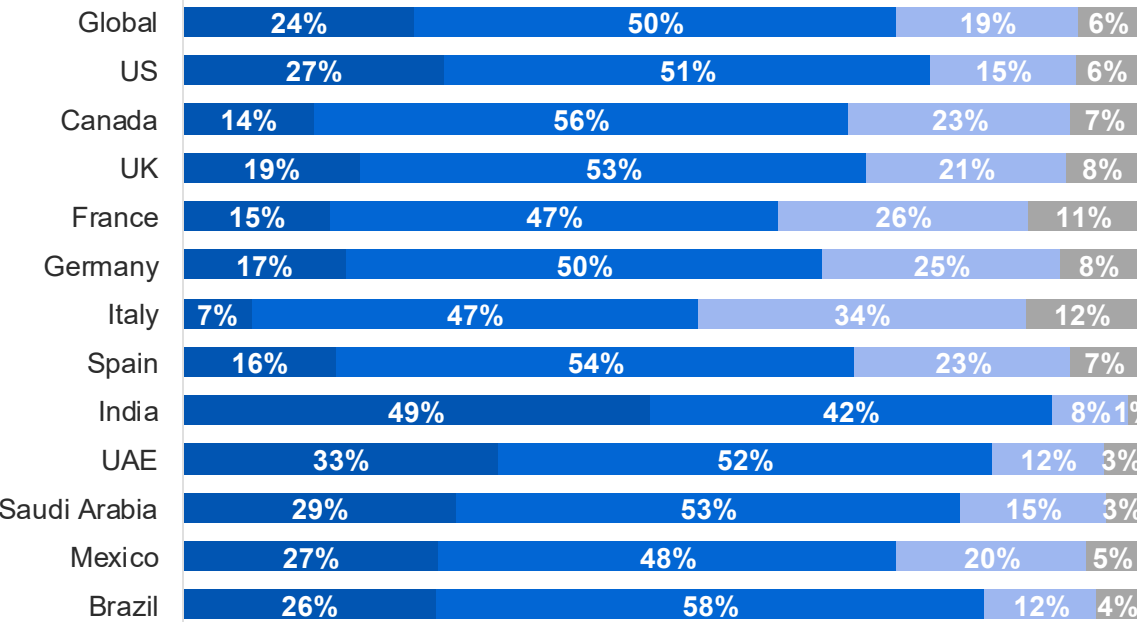
SPORTS CREATORS & SOCIAL COMMUNITY

Storytelling strengthens creator-led fandom, with three-quarters of followers saying it adds to or shapes their connection with sports

Importance of Storytelling by Sports Influencers

Among those who follow sports influencers

- Very important – it's how I connect emotionally to teams/players
- Somewhat important – it adds to the experience
- Not very important – I prefer official content or broadcasts
- Not at all important – I don't follow creators for sports storytelling



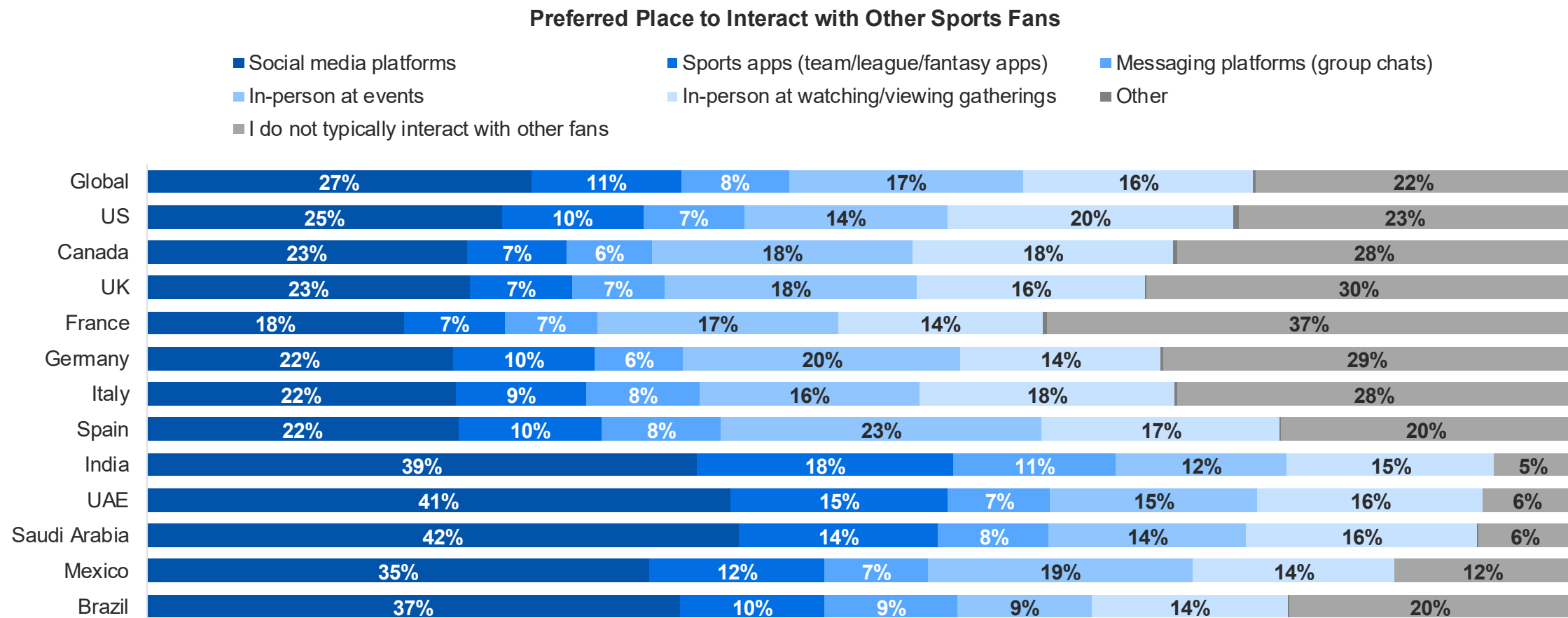
Fans Who Say Storytelling is Very Important

% very important, Among those who follow sports influencers

Generations	Gen Z	Millennials	Gen X	Boomers
Global	29%	28%	19%	10%
US	29%	32%	30%	13%
Canada	21%	16%	10%	1%
UK	21%	25%	13%	4%
France	23%	17%	8%	11%
Germany	19%	19%	15%	14%
Italy	10%	7%	7%	5%
Spain	18%	17%	14%	14%
India	46%	54%	47%	31%
UAE	40%	33%	28%	N size too small to show
Saudi Arabia	28%	32%	23%	N size too small to show
Mexico	25%	28%	25%	N size too small to show
Brazil	25%	30%	24%	N size too small to show

SPORTS CREATORS & SOCIAL COMMUNITY

Social media is a primary spot for meeting fans, especially in India, UAE, Saudi Arabia, Mexico, and Brazil



Shared viewing remains the most appealing form of fan interaction at 47%, well ahead of chats, polls, influencers or competitions

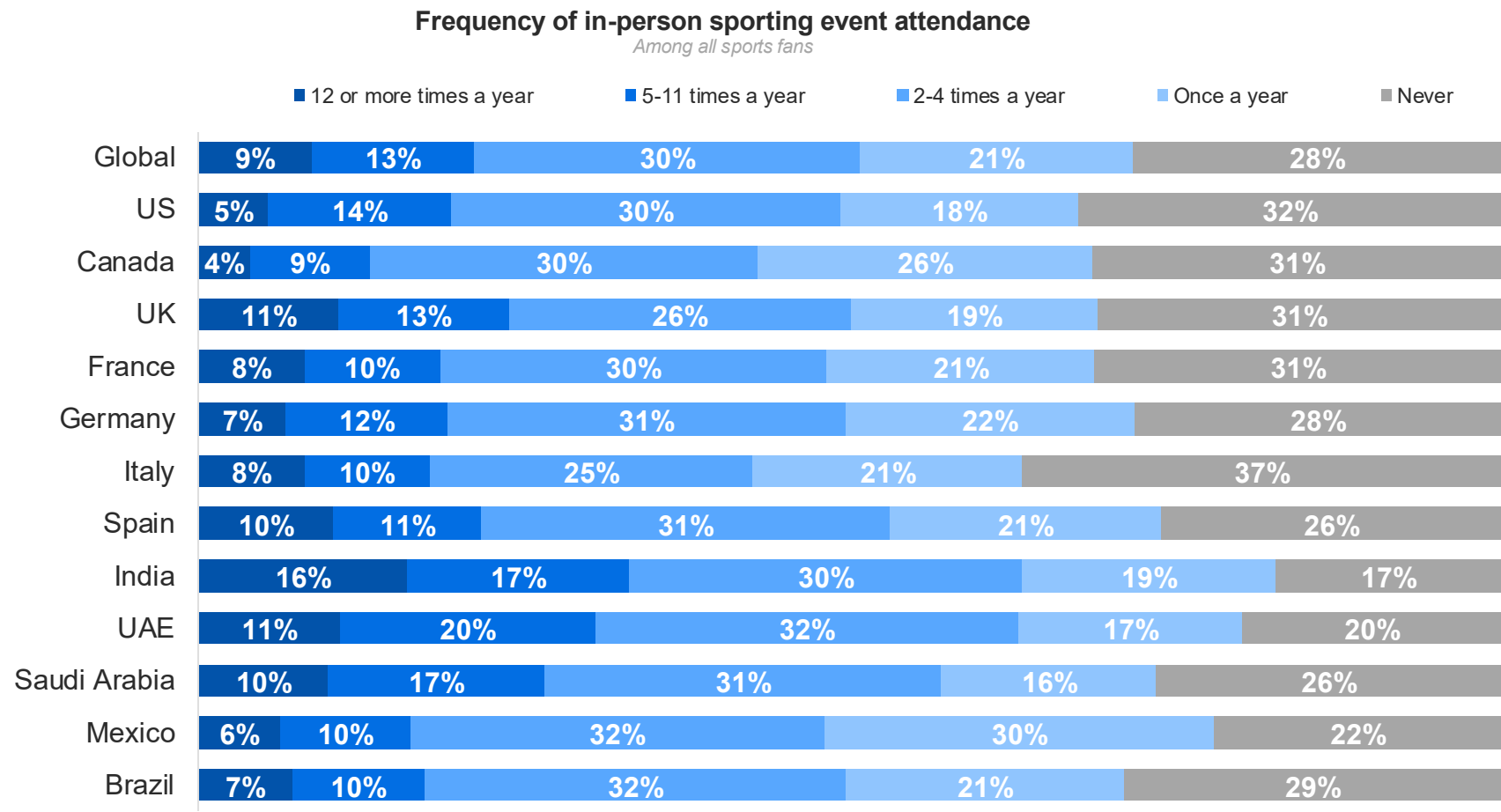
	Live chats with other fans	Participating in polls or predictions	Watching games at the same time with friends	Engaging with influencers or sports analysts in real time	Competing with other fans (fantasy, challenges, games)
Global	13%	14%	47%	14%	11%
US	14%	11%	47%	15%	12%
Canada	12%	13%	53%	13%	9%
UK	17%	11%	49%	12%	10%
France	19%	15%	45%	12%	8%
Germany	12%	14%	49%	12%	12%
Italy	10%	20%	52%	9%	8%
Spain	11%	15%	55%	10%	9%
India	15%	16%	32%	21%	16%
UAE	12%	14%	43%	18%	13%
Saudi Arabia	11%	11%	47%	18%	13%
Mexico	10%	17%	48%	15%	10%
Brazil	13%	16%	48%	15%	7%

SECTION 6

The Future of Live Events

THE FUTURE OF LIVE EVENTS

Nearly three-quarters of sports fans attend an event in a typical year, including 21% who attend at least five times



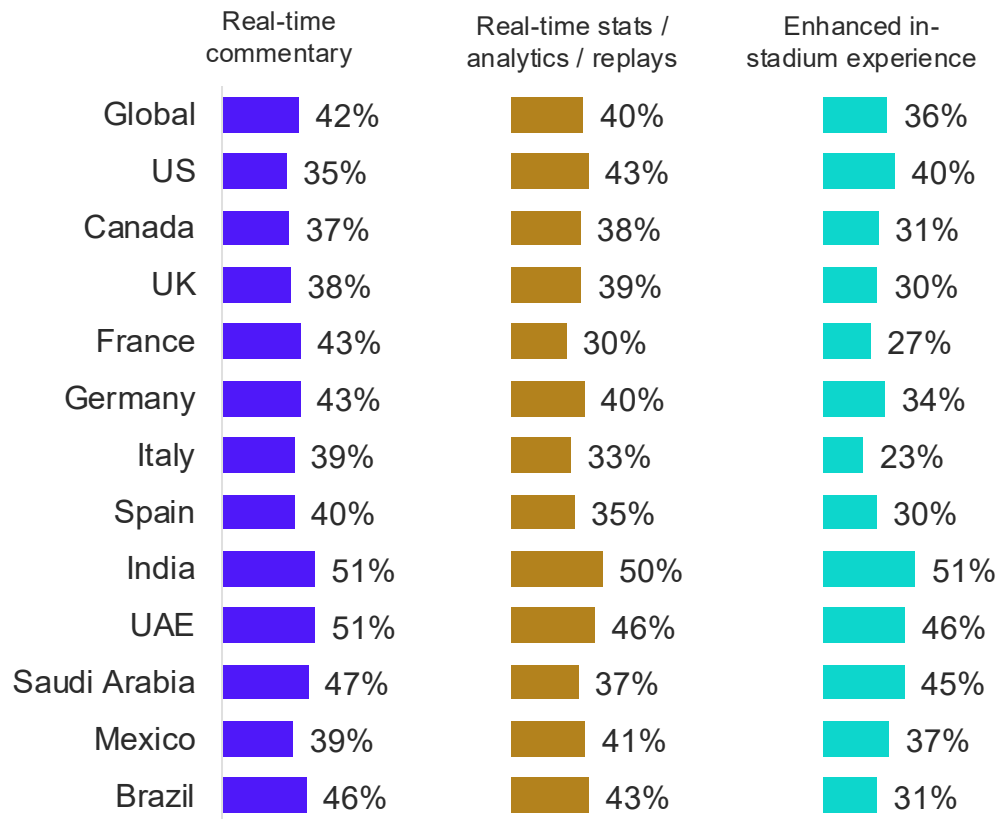
IBM1 In a typical year, how often do you attend sporting events in-person?
Sample Sizes: Global = 20589n, US = 2063n, Canada = 2047n, UK = 2031n, France = 2055n, Germany = 2043n, Italy = 2031n, Spain = 2043n, India = 2073n, UAE = 1044n, Saudi Arabia = 1055n, Mexico = 1054n, Brazil = 1050n

THE FUTURE OF LIVE EVENTS

At live events, apps add a second layer of action through real-time commentary, enhanced venue experiences and deeper statistics

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

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Commentary – 41%	Stats – 43%	Commentary – 43%	Commentary – 42%
US	Social	Enhanced	Stats	**Stats
Canada	Stats	Stats	Commentary	Commentary
UK	Social	Stats	Stats	**Commentary
France	Social	Commentary	Commentary	Commentary
Germany	Commentary	Commentary	Stats	*Commentary *Stats
Italy	Stats	Commentary	Commentary	Commentary
Spain	Enhanced	Commentary	Commentary	Commentary
India	Commentary	Enhanced	Commentary	Commentary
UAE	Commentary	Enhanced	Commentary	Commentary
Saudi Arabia	*Commentary *Social *Enhanced	Enhanced	Commentary	Commentary
Mexico	Stats	Stats	Commentary	Stats
Brazil	Commentary	Commentary	Commentary	Historical

*Tied for top 1

**Top response was "I do not use sports apps while attending live sporting events"

Commentary
= Real-time commentary

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

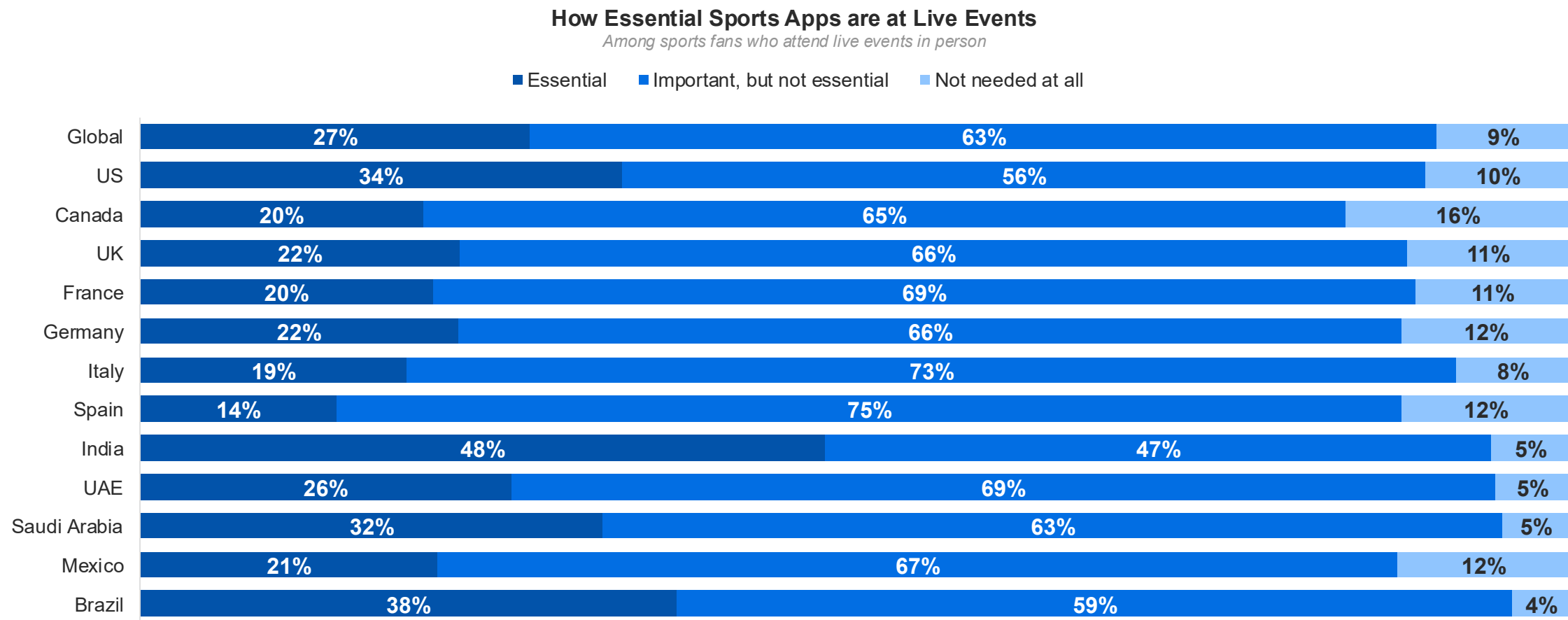
Social
= Engaging with other fans, social sharing (post highlights, photos, etc.)

Enhanced
= Enhanced in-stadium experience

Historical
= Historical insights and analysis (player/team comparisons)

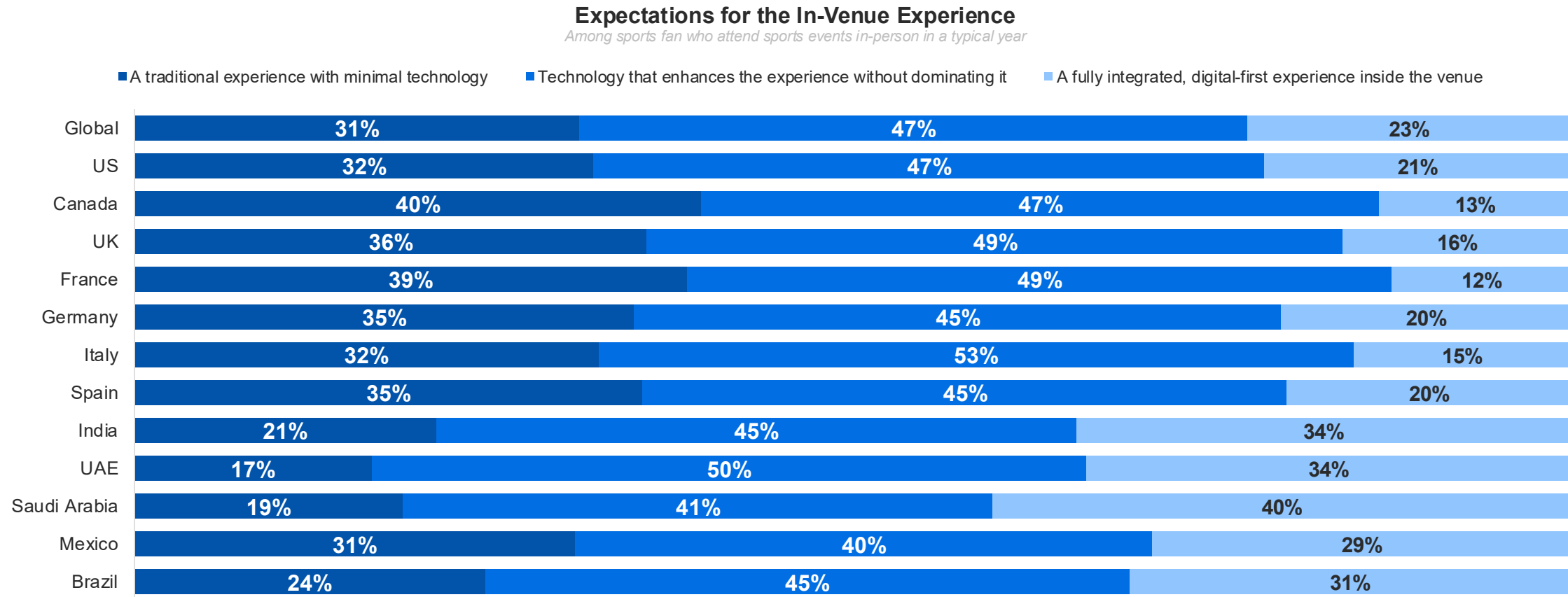
THE FUTURE OF LIVE EVENTS

Sports apps are at least important to 91% of users attending live events, although only 27% consider them essential



THE FUTURE OF LIVE EVENTS

Fans want technology to support, not overshadow, the live experience with 47% preferring selective enhancements over a fully digital venue



Gen Z and Millennials are much more likely to expect a fully integrated digital experience, while 54% of Boomers prefer a traditional experience with minimal technology. Golf fans are slightly more open to a fully digital-first experience.

THE FUTURE OF LIVE EVENTS

Reliable connectivity and real-time statistics top the in-venue wish list at 38% and 36%, ahead of convenience and entertainment features

	Reliable, high-speed connectivity	Real-time stats and multi-angle replays on mobile apps	Seamless mobile concession ordering (food, merchandise)	Personalized seat or experience upgrades (based on fan profile)	Venue navigation tools	Participating in in-stadium entertainment	Behind the scenes app-only content	No technology features would improve my experience
Global	38%	36%	25%	26%	21%	30%	22%	11%
US	38%	36%	29%	29%	21%	31%	21%	13%
Canada	34%	32%	23%	23%	18%	29%	17%	17%
UK	38%	30%	24%	22%	21%	24%	17%	22%
France	29%	29%	18%	18%	20%	25%	17%	19%
Germany	30%	29%	23%	24%	17%	31%	18%	16%
Italy	29%	27%	17%	15%	24%	30%	25%	13%
Spain	37%	41%	23%	27%	18%	25%	17%	11%
India	44%	49%	38%	38%	25%	36%	28%	1%
UAE	46%	43%	32%	33%	24%	35%	30%	2%
Saudi Arabia	46%	41%	29%	32%	30%	32%	32%	1%
Mexico	41%	40%	24%	30%	21%	30%	27%	4%
Brazil	50%	41%	19%	25%	26%	34%	29%	5%

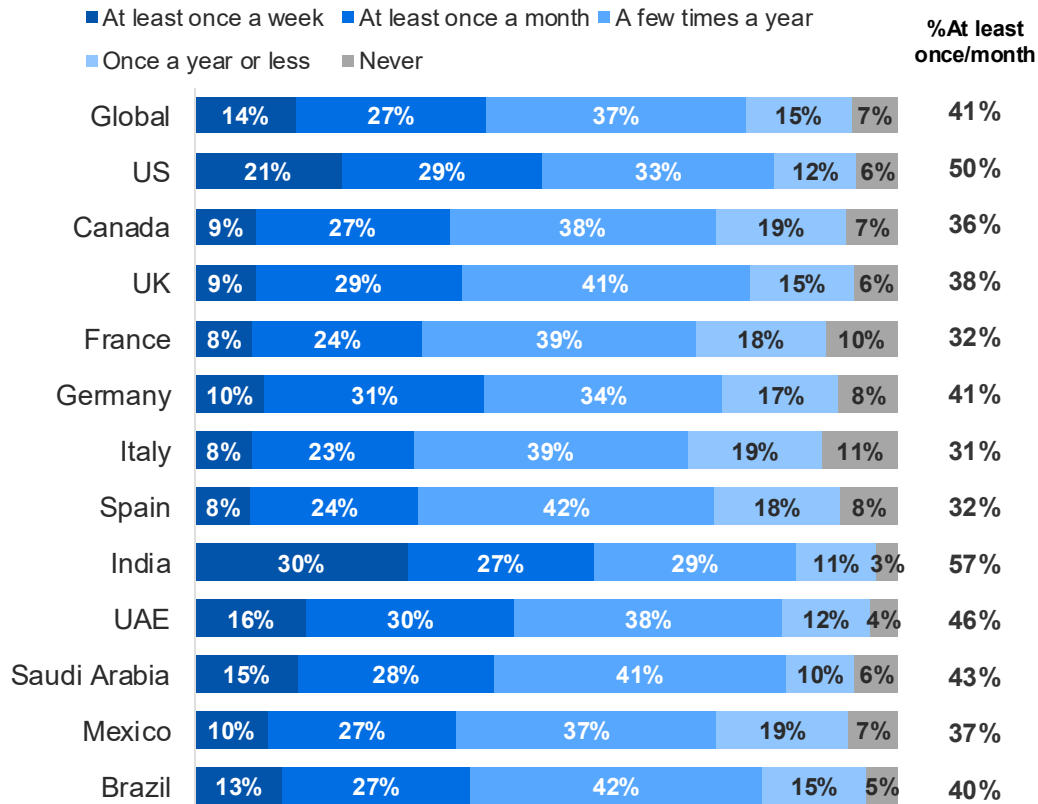
Younger fans show greater interest in personalized upgrades, mobile concessions and app-based content. Golf fans place particularly strong emphasis on reliable connectivity.

THE FUTURE OF LIVE EVENTS

Sports apps are becoming commerce platforms for tickets, food/beverage, and merchandise purchases; 2 in 5 make a purchase at least once a month

Frequency of In-App Purchasing

Among sports app users



Types of In-App Purchases

Among sports app users that have made a purchase

	Tickets to a live event	Food or beverage orders at a live event	Team or player merchandise	In-app upgrades	Experiences
Global	33%	30%	29%	21%	20%
US	32%	34%	32%	22%	25%
Canada	29%	25%	24%	14%	17%
UK	30%	27%	24%	16%	16%
France	30%	24%	24%	18%	18%
Germany	33%	24%	30%	19%	20%
Italy	29%	21%	19%	12%	13%
Spain	35%	25%	29%	17%	17%
India	39%	39%	36%	36%	33%
UAE	39%	39%	31%	24%	26%
Saudi Arabia	38%	37%	29%	25%	25%
Mexico	30%	31%	33%	22%	15%
Brazil	27%	27%	34%	23%	12%

IBM39 Have you made any of the following purchases directly within a sports app in the last 12 months? Select all that apply.

Sample Sizes: Global = 14,864n, US = 1,506n, Canada = 1,329n, UK = 1,442n, France = 1,145n, Germany = 1,283n, Italy = 1,203n, Spain = 1,424n, India = 1,938n, UAE = 947n, Saudi Arabia = 935n, Mexico = 890n, Brazil = 822n

IBM39a How often do you make purchases directly within a sports app?

Sample Sizes: Global = 10,491n, US = 1,058n, Canada = 793n, UK = 864n, France = 827n, Germany = 914n, Italy = 747n, Spain = 1,042n, India = 1,603n, UAE = 722n, Saudi Arabia = 709n, Mexico = 660n, Brazil = 552n

Note: Cells are conditionally formatted with a green-to-white color scale, where darker green indicates higher values and white indicates lower values

THE FUTURE OF LIVE EVENTS

Discounts and loyalty rewards are the strongest merchandise incentive at 38%, but personalization and exclusivity also motivate about one-quarter of fans

	Personalized product recommendations	Limited-edition or exclusive drops	Bundled with live events (buy during the game)	Recommendations from influencers or other sports fans	Discounts or loyalty rewards through apps	Nothing would influence me
Global	26%	26%	20%	21%	38%	25%
US	27%	29%	22%	23%	35%	29%
Canada	20%	24%	18%	15%	34%	33%
UK	20%	22%	16%	18%	33%	37%
France	17%	19%	16%	14%	25%	40%
Germany	24%	19%	18%	17%	36%	30%
Italy	24%	21%	9%	12%	33%	32%
Spain	26%	23%	19%	15%	39%	24%
India	39%	36%	34%	40%	45%	7%
UAE	35%	35%	32%	34%	52%	7%
Saudi Arabia	31%	34%	29%	33%	47%	9%
Mexico	31%	36%	21%	22%	43%	9%
Brazil	29%	30%	21%	22%	48%	16%

Gen Z is more receptive to creator recommendations, exclusive merchandise drops and social fan interactions, while Boomers strongly prefer watching with friends over digital or creator-led interactions.

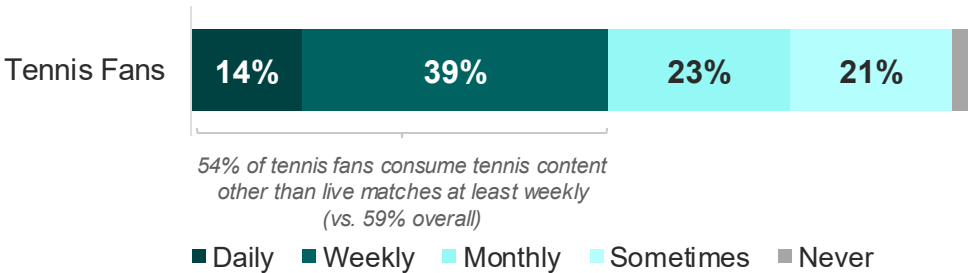
Appendix: Key Sport Highlights

APPENDIX: TENNIS HIGHLIGHTS

Tennis fans combine strong app engagement with high trust in AI-powered sports content

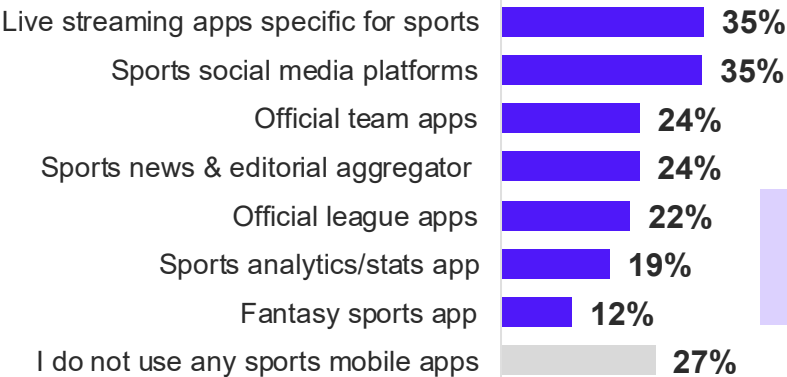
Frequency of Engagement with Additional Tennis Content

Among tennis fans engaging with additional tennis content



Sports App Usage Among Tennis Fans

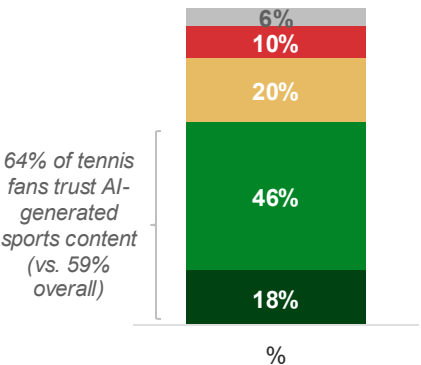
% selected, Among all tennis fans



73%
use sports apps
(vs. 72% overall)

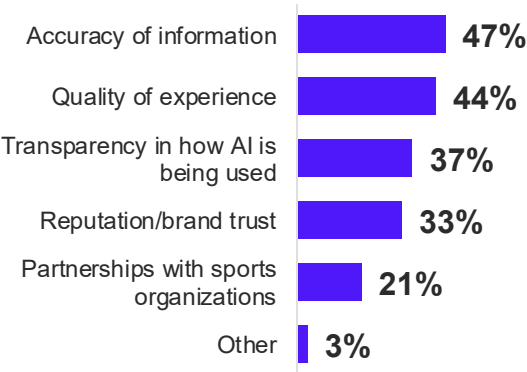
AI Trust Overall

% T2B, among all tennis fans



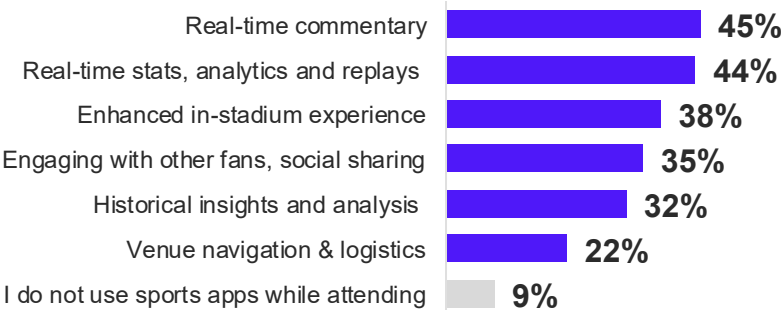
AI Trust Drivers

% selected, among all tennis fans



Sports App Features Used by Tennis Fans While Attending Live Events

% selected, Among tennis fans who use sports apps generally and attend live sporting events in-person



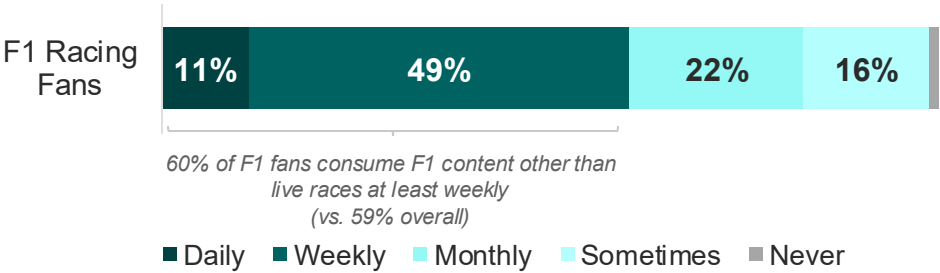
91%
use sports apps
during events
(vs. 91% overall)

APPENDIX: F1 RACING HIGHLIGHTS

F1 fans are digitally forward, with high app use and AI trust

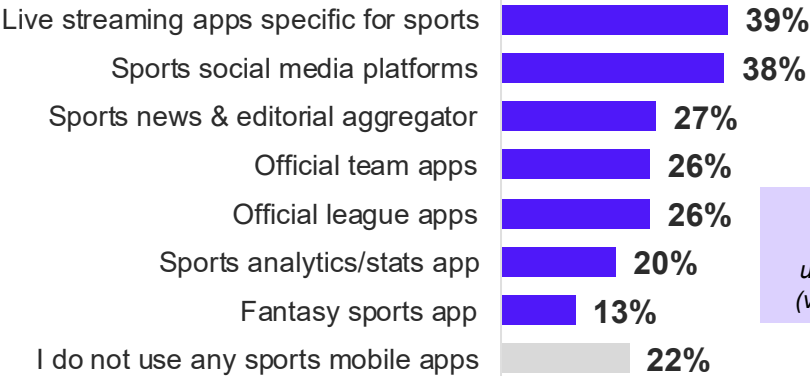
Frequency of Engagement with Additional F1 Content

Among F1 fans engaging with additional F1 content



Sports App Usage Among F1 Fans

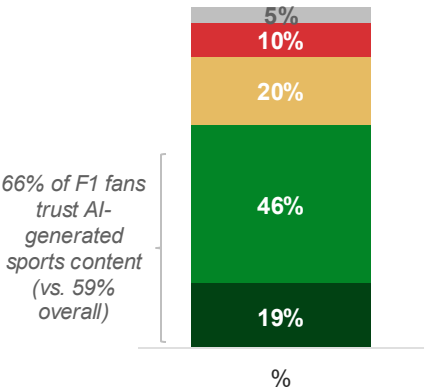
% selected, Among all F1 fans



78%
use sports apps
(vs. 72% overall)

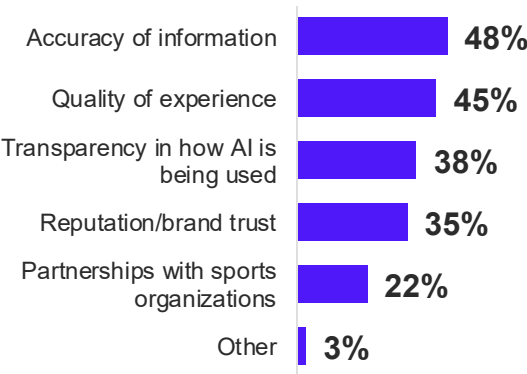
AI Trust Overall

% T2B, among all F1 fans



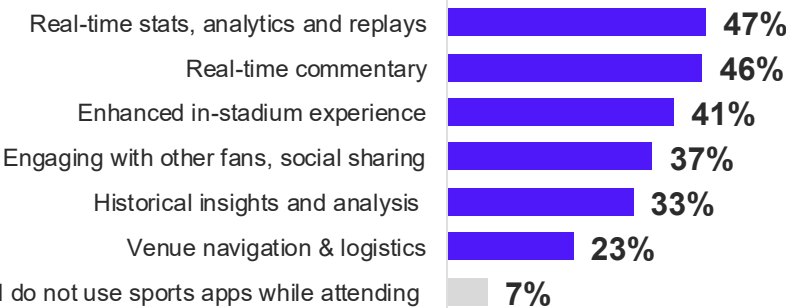
AI Trust Drivers

% selected, among all F1 fans



Sports App Features Used by F1 Fans While Attending Live Events

% selected, Among F1 fans who use sports apps generally and attend live sporting events in-person



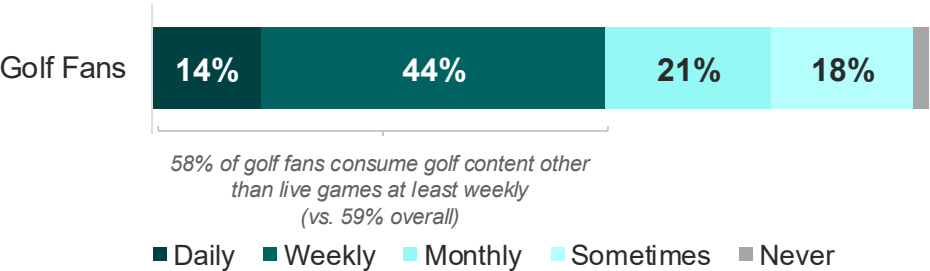
93%
use sports apps
during events
(vs. 91% overall)

APPENDIX: GOLF HIGHLIGHTS

Golf fans pair strong digital engagement with a premium on accuracy and trusted AI experiences

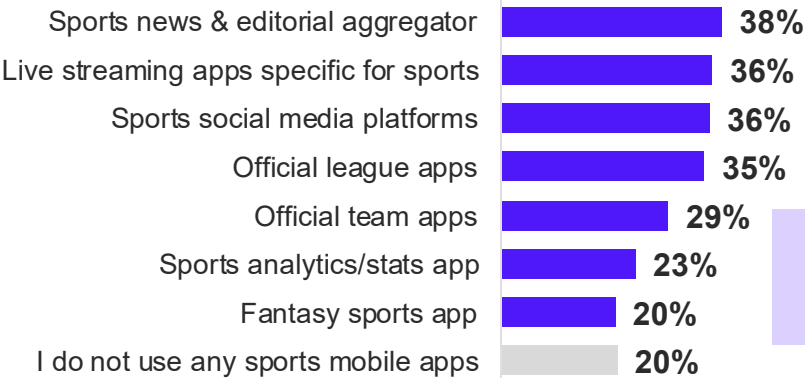
Frequency of Engagement with Additional F1 Content

Among golf fans engaging with additional golf content



Sports App Usage Among Golf Fans

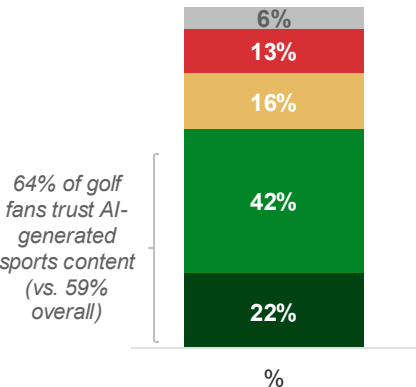
% selected, Among all golf fans



80%
use sports apps
(vs. 72% overall)

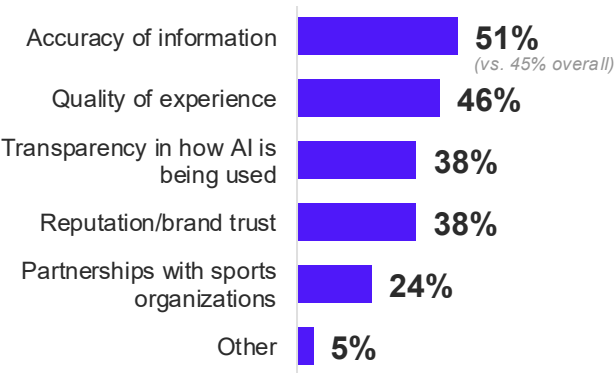
AI Trust Overall

% T2B, among all golf fans



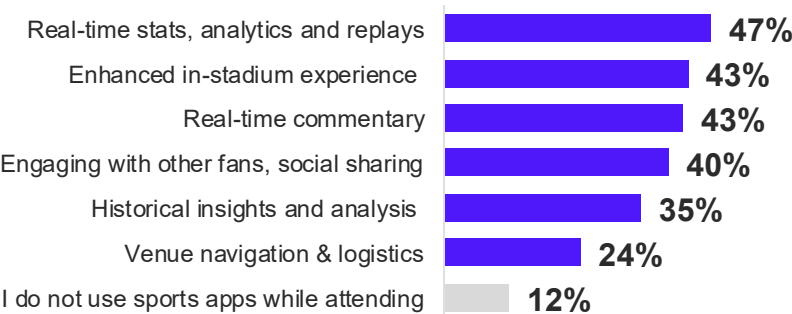
AI Trust Drivers

% selected, among all golf fans



Sports App Features Used by Golf Fans While Attending Live Events

% selected, Among golf fans who use sports apps generally and attend live sporting events in-person



88%
use sports apps
during events
(vs. 91% overall)

Appendix

APPENDIX: FANBASES

Soccer is the only largely global sport, followed by 74% of fans overall, while every other fanbase varies sharply 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	74%	41%	33%	32%	31%	21%	21%	19%	16%	14%	10%	10%
US	31%	39%	20%	67%	17%	18%	77%	16%	57%	4%	4%	21%
Canada	48%	54%	23%	44%	18%	15%	42%	11%	53%	6%	5%	21%
UK	88%	40%	39%	15%	34%	21%	12%	22%	5%	26%	29%	21%
France	72%	50%	42%	19%	22%	24%	5%	28%	2%	0%	36%	4%
Germany	86%	45%	30%	24%	34%	24%	14%	30%	5%	1%	3%	6%
Italy	81%	51%	58%	17%	45%	27%	2%	32%	2%	1%	7%	2%
Spain	88%	38%	49%	40%	43%	18%	3%	19%	3%	0%	4%	4%
India	64%	28%	29%	26%	24%	15%	14%	8%	12%	83%	5%	7%
UAE	84%	25%	33%	40%	38%	33%	19%	18%	10%	25%	6%	9%
Saudi Arabia	93%	14%	19%	25%	30%	20%	8%	12%	3%	3%	1%	5%
Mexico	91%	37%	12%	32%	26%	16%	34%	2%	28%	1%	2%	4%
Brazil	94%	56%	21%	34%	45%	26%	13%	23%	4%	0%	2%	2%

APPENDIX: FANBASES

Soccer fandom expanded across nearly every market, while changes in other sports were more localized and uneven

2025 vs. 2026: Following of key sports across markets
% selected, Among all sports fans

	US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA		MEXICO		BRAZIL	
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
Soccer	22%	31%	38%	48%	84%	88%	65%	72%	83%	86%	79%	81%	84%	88%	60%	64%	79%	84%	93%	93%	83%	91%	89%	94%
Olympics	39%	39%	54%	54%	43%	40%	53%	50%	47%	45%	52%	51%	44%	38%	33%	28%	29%	25%	15%	14%	36%	37%	57%	56%
Tennis	19%	20%	24%	23%	42%	39%	45%	42%	29%	30%	52%	58%	55%	49%	37%	29%	31%	33%	18%	19%	13%	12%	19%	21%
Basketball	61%	67%	45%	44%	14%	15%	19%	19%	24%	24%	19%	17%	41%	40%	22%	26%	41%	39%	23%	25%	31%	32%	35%	34%
F1 racing	13%	17%	17%	18%	36%	34%	23%	22%	36%	34%	44%	45%	46%	43%	22%	24%	33%	37%	24%	30%	26%	26%	38%	45%
Swimming	15%	18%	16%	15%	19%	21%	26%	24%	27%	24%	29%	27%	20%	18%	16%	15%	32%	33%	21%	20%	16%	16%	28%	26%
American Football	79%	77%	42%	42%	11%	12%	4%	5%	17%	14%	3%	2%	4%	3%	14%	14%	15%	18%	6%	8%	33%	34%	12%	13%
Track and field	14%	16%	12%	11%	23%	22%	30%	28%	30%	30%	33%	32%	23%	19%	8%	8%	18%	17%	13%	12%	3%	2%	20%	23%
Baseball	57%	57%	43%	53%	5%	5%	2%	2%	6%	5%	2%	2%	4%	3%	10%	12%	8%	10%	3%	3%	28%	28%	4%	4%
Cricket	2%	4%	5%	6%	28%	26%	0%	0%	1%	1%	0%	1%	0%	0%	91%	83%	24%	25%	4%	3%	0%	1%	0%	0%
Rugby	3%	4%	5%	5%	30%	29%	40%	36%	3%	3%	8%	7%	5%	4%	4%	5%	5%	6%	1%	1%	2%	2%	2%	2%
Golf	21%	21%	21%	21%	20%	21%	4%	4%	7%	6%	3%	2%	5%	4%	7%	7%	10%	9%	5%	5%	5%	4%	3%	2%
Sample Sizes	2051	2063	2039	2047	2046	2031	2043	2055	2046	2043	2036	2031	2043	2043	2209	2073	1028	1044	1048	1055	1227	1054	1048	1050

= Significant increase between 2025 and 2026 at 95% CI = Significant decrease between 2025 and 2026 at 95% CI

APPENDIX: FREQUENCY OF LIVE SPORTS WATCHING

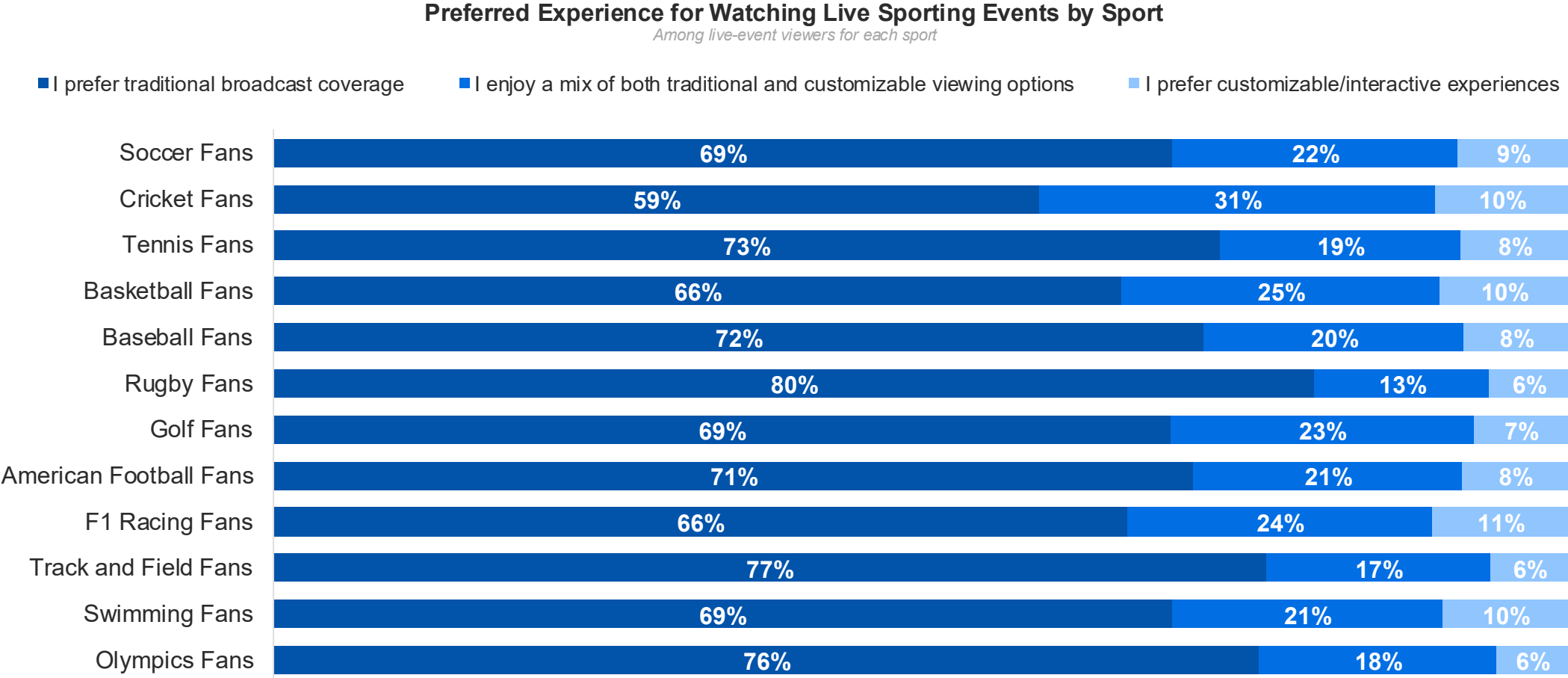
Daily live sports viewing increased from 2025 across nearly every market, with the sharpest gains occurring in France, Germany, the UAE and Mexico

Frequency of Watching Live Sporting Events																								
% selected, Among all sports fans																								
US		CANADA		UK		FRANCE		GERMANY		ITALY		SPAIN		INDIA		UAE		SAUDI ARABIA		MEXICO		BRAZIL		
	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
Daily	18%	21%	16%	20%	11%	15%	6%	11%	6%	11%	8%	11%	9%	13%	28%	30%	19%	27%	26%	28%	10%	17%	19%	23%
Weekly	42%	45%	44%	44%	48%	48%	34%	36%	46%	45%	49%	48%	48%	47%	38%	40%	46%	42%	40%	42%	45%	45%	44%	39%
Monthly	12%	12%	13%	12%	17%	13%	22%	18%	18%	16%	13%	13%	14%	12%	12%	11%	13%	12%	13%	11%	12%	10%	10%	11%
Sometimes	21%	15%	23%	20%	20%	20%	32%	31%	26%	23%	26%	26%	23%	24%	18%	18%	20%	16%	16%	16%	28%	25%	24%	24%
Never	7%	6%	4%	4%	4%	4%	5%	4%	4%	5%	3%	3%	6%	4%	3%	2%	2%	3%	5%	3%	4%	3%	3%	3%
Sample Sizes	2051	2063	2039	2047	2046	2031	2043	2055	2046	2043	2036	2031	2043	2043	2209	2073	1028	1044	1048	1055	1227	1054	1048	1050

= Significant increase between 2025 and 2026 at 95% CI = Significant decrease between 2025 and 2026 at 95% CI

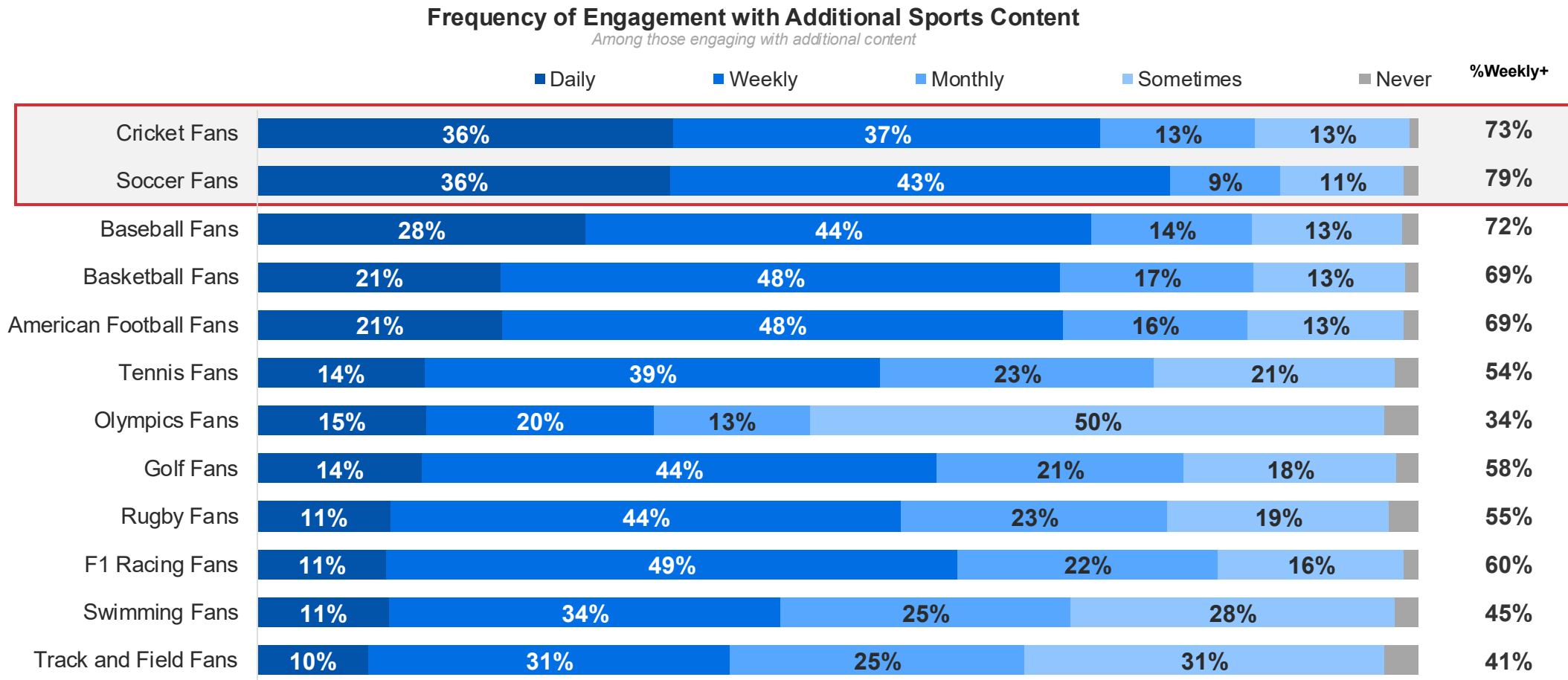
APPENDIX: PREFERRED LIVE WATCHING EXPERIENCES

Traditional coverage remains the preference across sports, though about one in five viewers want a blend of broadcast and customizable features



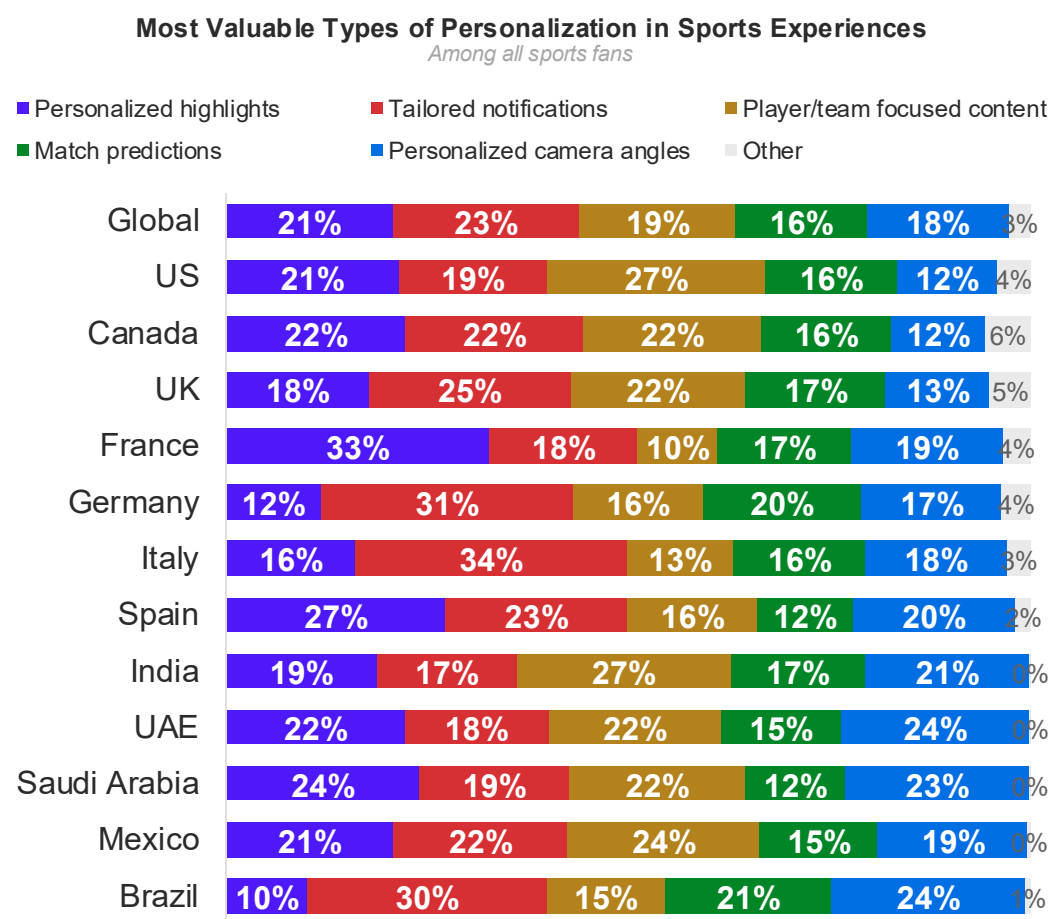
APPENDIX: FREQUENCY OF ADDITIONAL SPORTS CONTENT

Cricket and soccer inspire the most frequent engagement, with more than one-third of fans consuming additional content daily



APPENDIX: PERSONALIZATION FEATURES

No single personalization feature dominates globally: tailored notifications lead at 23%, followed closely by highlights at 21%



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

Generations	Gen Z	Millennials	Gen X	Boomers
Global	Content – 22%	Highlights – 21%	Notifications – 25%	Notifications – 29%
US	Content	Content	Content	Content
Canada	Content	Highlights	Notifications	Notifications
UK	Content	Content	Notifications	Notifications
France	Highlights	Highlights	Highlights	Highlights
Germany	Camera	Notifications	Notifications	Notifications
Italy	Notifications	Notifications	Notifications	Notifications
Spain	Highlights	Highlights	Highlights	Highlights
India	Content	Content	Content	Pred.
UAE	Camera	Camera	Highlights	Highlights
Saudi Arabia	*Camera *Highlights	Highlights	Camera	*Camera *Content *Highlights
Mexico	Content	Content	Notifications	Content
Brazil	Notifications	Notifications	Notifications	Notifications

Camera
= Personalized camera or AR views

Notifications
= Tailored notifications

Content
= Player/team focused content feeds

Pred.
= Match predictions

Highlights
= Personalized highlight reels

