The Generational Fan Playbook

The 2025/26 WSC Sports Fan Engagement Study:
How Gen X, Y, and Z Are Redefining Sports Fandom

Executive Summary

WSC Sports surveyed 1,050 U.S. sports fans, 350 each from Gen X (age 45-60), Gen Y (Millennials, 30-44), and Gen Z (18-29), to understand how viewing habits, fandom, and expectations are evolving ahead of 2026 and beyond.

The data reveals a sports audience that remains highly engaged but increasingly fragmented across platforms, formats, and motivations. Gen X shows steady and settled behavior, Millennials emerge as the most reliable and monetizable generation, while Gen Z is rewriting the rules of fandom, shifting loyalty from teams to personalities, and consuming sports more as social and cultural content than scheduled broadcasts.

Across all age groups, four forces define the next era of sports engagement:

1. **Millennials are the commercial core. They watch most often, subscribe deepest, churn fastest when personalization stumbles, and show the strongest intent to buy.**

2. **Fans are drowning in content, not relevance. Overload is widespread; curation and speed-to-relevance win attention.**

3. **AI (Artificial Intelligence) moves from efficiency to relevance. Fans (especially Millennials) are open to AI, as long as it feels personal.**

4. **Interactive and multilingual are the next defaults. Fans want control (angles, replays, stats) and instant language versions baked into the experience.**

Rights holders must treat personalization as part of their business model, not a bonus feature. They should design content ecosystems that learn from every interaction, use data to strengthen the value exchange, and measure success by retention and lifetime value, not just reach.

Top 5 Highlights

1. **Millennials are sports' most reliable audience.**

   Nearly half of Gen Y respondents (49%) watch sports daily and 85% identify as die-hard or regular fans, making them the most consistent and commercially valuable demographic in sports media. They also lead in subscriptions, personalization expectations, and purchase intent.

2. **Gen Z's fandom has shifted from teams to people.**

   Gen Z fans feel more connected to athletes (31%) than to teams (27%). Their fandom is personality-driven, fluid, and social, built through short-form highlights and creator content rather than league loyalty.

3. **Streaming is the new default, YouTube the common ground.**

   65% of Millennials and 55% of Gen Z choose streaming platforms as their primary sports destination, while YouTube remains the only truly cross-generational channel bridging live, long-form, and short-form viewing alike.

4. **Short-form now rivals live for younger fans**.

   Gen Z is 71% more likely than Gen X and 39% more likely than Millennials to select short (≤2 min) or very short (≤30 sec) clips. **Condensed replays hit ~35% for Gen Z** versus **18% for Gen X**, collectively approaching live games in stated preference.

5. **Personalization is now make-or-break.**

   More than half of fans (56% of Millennials, 52% of Gen X, 48% of Gen Z) have canceled or switched a streaming service over weak personalization. Yet 62% of Millennials say they're likely or very likely to buy through a personalized highlight which proves that tailored content directly translates into retention and revenue.

Methodology

Survey conducted by WSC Sports in October 2025 among 1,050 U.S. sports fans (350 each from Gen X, Gen Y, and Gen Z) via SurveyMonkey. Participants were screened for active sports fandom and completed a quantitative online questionnaire. Results carry a ±3% margin of error at a 95% confidence level, with analysis segmented strictly by generation.

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Generational Insights: Inside the Feed

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Sports fandom now lives across a spectrum of generations that share passion but differ dramatically in how they express it. The following insights break down where each audience is shifting, from screens and discovery to the creators they trust and the fatigue they feel navigating it all.

1. Smart TV anchors live, but Gen Z fragments screens

Sports viewing is no longer bound to one device.

Smart TVs still dominate for Gen X (61%) and Millennials (63%), but Gen Z has already broken that pattern, with less than half (47%) naming TV as their main screen. Instead, they multitask across smartphones, laptops, and even gaming consoles, treating sports as a continuous experience that moves between contexts.

For rights holders, this means the live broadcast remains the anchor, but highlights and companion content must be optimized for smaller, personal screens where Gen Z actually spends its time.

2. Discovery is social, activation is in-app

Across all generations, social feeds have become the starting point for new sports content, around 40% of fans across every group say they discover new players or teams this way.

But what happens next differs: Millennials and Gen Z are twice as likely as Gen X to re-engage through app notifications or personalized alerts, showing how discovery on social media only becomes habit when it continues inside owned channels.

For teams, leagues and broadcasters, that bridge between "found on social" and "experienced in-app" is where long-term loyalty is built.

3. Creators sway the agenda

The cultural voice of sports is shifting from commentators to creators.

Over half of Millennials (58%) and Gen Z (53%) say streamers and independent creators influence how they follow sports. For Millennials, that influence often leads to deeper engagement and viewing choices; for Gen Z, it shapes perception, tone, and fandom identity.

In short, creators now decide what feels relevant. Rights holders that integrate creator-style storytelling or collaborations are speaking the language fans already use.

→ *58% of Millennials and 53% of Gen Z say creators influence what they watch.*

4. Short-form rivals live, and reshapes expectations

Live games still anchor sports culture, but highlight behavior shows a parallel universe of attention.

Among Gen Z, condensed and short-form highlights (under 2 minutes) now rival live games in overall engagement. These fans consume sports in micro-moments, a clip, a story, a swipe, and expect those fragments to deliver the same emotion as full broadcasts.

This shift is driven by repetition. Each short video reinforces behavior, helping fans build a rhythm around their favorite players and teams.

> → *39% of Gen Z say short highlights (under two minutes) match or exceed live viewing in preference.*

5. Overload is the tax on choice

Today's fans face an avalanche of content. More than half of Millennials (53%), and to a slightly lesser extent Gen X (43%), say they often feel overwhelmed by the amount of sports content available. Even Gen Z, despite being known for effortless scrolling, reports a 37% "often" or "very often" rate.

With so many platforms, packages, and feeds, fans are drowning in access but starving for relevance. This is where personalization becomes essential: helping each generation navigate abundance by surfacing what matters most, faster, cleaner, and in their preferred format.

Takeaway

Generational differences are no longer about who watches more sports, but how they manage it. Older fans still lean on structure and live events; Millennials are the omnivores of the sports economy; and Gen Z curates, scrolls, and shares sports as culture. For rights holders, the opportunity lies in designing experiences that adapt to each, from real-time storytelling to personalized highlight ecosystems that transform fleeting moments into lasting loyalty.

Summary:

GEN X

The Anchored Traditionalist
Structured, loyal, and live-event oriented.

Defining Habits:

67% expect highlights within the game window

61% watch primarily on Smart TV

80% identify as die-hard or regular fans

Mindset:
"Sports are part of my routine. I want quality and reliability over novelty."

Top Traits:

📺 Live-first | 💳 Subscribed & steady | 🧩 Loyal to teams

Opportunity for Rights Holders:

Streamline viewing, use teams as a vehicle for storytelling, and maintain trust.

GEN Y (MILLENNIALS)

The Omnivore Core
The most engaged, monetizable, and influence-rich generation.

Defining Habits:

49% watch daily, 85% are die-hard or regular fans

68% hold two or more streaming subscriptions

56% have canceled a service over weak personalization

Mindset:
"I follow everything, but make it seamless, fast, and relevant."

Top Traits:

📱 Streaming-first | ⚙️ Personalization-sensitive | 🛍️ Commerce-ready

Opportunity for Rights Holders:

Invest in loyalty loops and premium personalization to increase LTV, this group drives revenue.

GEN Z

The Cultural Curator
Personality-driven, short-form-first, and socially native.

Defining Habits:

31%   feel more connected to athletes than teams

76%   followed a new sport, team, or player this year

39%   say short-form rivals live content

Mindset:
"Sports are culture in digital-communities. I discover through creators, not channels."

Top Traits:

🎥 Short-form first | 🧠 Creator-influenced |
💬 Multi-platform multitasker

Opportunity for Rights Holders:
Collaborate with creators, integrate player-driven storytelling, and prepare for constant re-acquisition.

Summary:

	Gen X	Gen Y (Millennials)	Gen Z
Daily sports engagement	✔️ Moderate, steady habits	✔️✔️ Highest daily cadence	✔️ Occasional but frequent
Personality-driven fandom	❌ Team-first loyalty	✔️ Balanced between team and player	✔️✔️ Athlete-first, fluid fandom
Streaming-first consumption	✔️ Partial adoption	✔️✔️ Primary mode	✔️✔️ Default mode
Creator and athlete influence	❌ Low	✔️✔️ Strong engagement	✔️ High cultural impact
Personalization sensitivity (churn risk)	✔️ High	✔️✔️ Highest: demand tailored feeds	✔️ Medium: expect relevance, not loyalty
Commerce through highlights	✔️ Emerging interest	✔️✔️ Strong conversion potential	✔️ Curiosity, low follow-through
Growth in women's sports	✔️ Event-driven rise	✔️✔️ Sustained interest	✔️ Spikes, not consistent
Behind-the-scenes importance	✔️❌ Moderate	✔️✔️ Core to emotional connection	✔️✔️ Baseline expectation
Content fatigue	✔️ Noticeable	✔️✔️ Most overwhelmed	✔️ Adapted: scrolls through overload

02

Winning the Feed: Strategies for the Next Fan Era

The generational data points to one clear priority: relevance. Rights holders compete not only with other sports, but with every swipe of attention on mobile. To earn loyalty, digital experiences must feel personal and timely, turning highlights and feeds into meaningful, everyday touchpoints.

1. Build habit through short-form storytelling

Fans don't wait for content anymore. They expect it in their feeds, in context, and within minutes.
Rights holders should treat every key moment as a chance to spark a daily engagement loop: short, platform-native clips that connect fans to what matters most to them. For younger audiences, this isn't a supplement to live viewing, it is the experience.

2. Make personalization the foundation, not a feature

With over half of fans switching services due to poor personalization, algorithmic curation is now a retention driver.
Teams, leagues and broadcasters need to invest in systems that understand each fan's preferences, from favorite teams and players to content length and language. Personalization isn't just technical; it's emotional. It tells fans: this feed is yours.

3. Turn creators and athletes into distribution partners

Creators have become cultural gatekeepers. They are shaping how fans talk about sports.
Rather than competing with them, rights holders should collaborate, integrating creator perspectives, behind-the-scenes moments, and athlete-generated stories into their ecosystem. Authenticity scales faster than production value, especially with Gen Z.

4. Reduce overload through smarter content delivery

Fans are overwhelmed by choice. Simplifying the experience, fewer clicks, cleaner feeds, faster highlights, is now a differentiator.
AI-driven automation and intelligent asset management can streamline how content is created and surfaced, ensuring fans see what's relevant, not just what's available.

5. Redefine success beyond view counts

Engagement metrics are shifting.
Instead of measuring how many people watch, rights holders are focusing on how deeply they engage. Return visits, watch time per user, and repeat sessions now signal lasting fandom more reliably than reach alone.

Takeaway

The shift from rights to feeds has already happened. The next advantage belongs to those who act like publishers and platforms simultaneously, automating production, curating experiences, and empowering fans to participate in the storytelling themselves.

03

The Road Ahead

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The next phase is about depth. Use AI to curate faster, personalize every touchpoint, work with creators and athletes as core channels, and track habit metrics over vanity counts. Build one connected system that publishes, learns, and distributes across every screen. Winners will know their fans at an individual level and act on those signals in real time.

1. **AI will redefine production and curation.** With 60% of Millennials and nearly half of Gen Z already positive toward AI in sports content, fans are signaling comfort with automated storytelling, as long as it feels personal and contextual. Rights holders will move from automation for efficiency to automation for relevance.

2. **Personalization is quickly becoming the core layer of how fans interact with sports.** More than half of fans have already canceled or replaced a streaming service because the experience did not feel tailored to them. That decision shows a growing expectation. Fans want platforms that recognize their habits and adjust in real time. The next generation of sports products will need to read context, understand intent, and shape each viewer's journey as it unfolds.

3. **Creators and athletes will become strategic infrastructure.** Over half of Millennials and Gen Z say creators influence how they follow sports. That cultural authority will only deepen, forcing rights holders to build collaboration into their distribution model.

4. **Habit metrics will replace vanity metrics.** Millennials remain the most consistent viewers, nearly half watch daily, but Gen Z's fragmented attention shows the need for new engagement measures. Rights holders will start optimizing for streaks, session depth, and return frequency, not just total views.

> → *More than 50% of fans have canceled or switched a service because the content didn't fit their habits.*

5. **The ecosystem will converge around integrated platforms.** As fans jump between social, app, and broadcast experiences, the distinction between channels is fading. The next wave of value will come from systems that unify highlight creation, personalization, and distribution across every endpoint.

6. **Sports organizations will adopt proven direct-to-consumer models.** The next wave of growth will come from thinking like mature digital brands. Teams, leagues, and broadcasters will use fan data to drive lifetime value, build recurring revenue streams, and personalize every touchpoint. The focus will shift from one-time transactions to long-term relationships built on insight, convenience, and connection.

04

Industry Voices: The New Fandom Mandates

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The generational data reveals the trends. The voices of the industry offer the mandate: a shift from broadcast distribution to owned, personalized content infrastructure. We gathered insights from executives, content leaders, and strategists across leagues, clubs, and media companies to understand how they are responding to the fundamental change reshaping sports fandom.

What follows are their voices, organized by the critical themes defining success in 2026 and beyond.

Innovation & Interactivity: What Fans Demand Next

Fully interactive viewing, choose your camera angles, replays, stats on demand, is the #1 most-wanted innovation across all generations. Rights holders who deliver it first will set the new baseline.

Josh Barbarotta, Senior Director, Digital Video Content at ESPN:

"

Don't be afraid to fully embrace AI and automation as core accelerators of content production. Most AI is only as strong as the prompts, systems, and editorial judgment behind it, meaning humans remain essential to shaping, training, and elevating what these tools can do. The organizations that blend human creativity with scaled automation should unlock massive gains in speed, relevance, and output."

Jared Hoffman, Content Executive, Warrior Media:

"

The critical trend is the lowering cost of content creation and the increasing skill level of native content creators. The cost of creating your own clips, highlights, and insights used to be so prohibitively expensive that you needed a third party to take the risks, but now that barrier is gone. I think we are increasingly getting into a world where teams themselves will have leverage over their leagues."

Matthieu Montigaud, Senior Product Manager at CANAL+:

"

Being at the forefront of innovation is a must in today's sports media landscape. With the help of WSC Sports, we've been offering fully interactive experiences to fans, allowing them to choose from various camera angles, statistics, highlight packages, formations, rankings, and more. We are trying to always push the limits of innovation to get more engagement, more community, more interactivity."

This push for interactivity is also expressed as a demand for different perspectives, even beyond the broadcast booth.

Liam Davies, Head of Commercial & Brand at Braincup Media:

"

When fans say they want different angles, to me this does not only mean camera angles. Independent creators give just that, too, in a way, different angles, by giving different perspectives. Watching a streamer while you're watching a game or a match is something that, while it is already big, we will see it developing further."

The technical barrier to providing this scale of content is collapsing, shifting power dynamics in the process.

Lina Gustafson, Private Market & Event Manager at HockeyAllsvenskan:

"

It used to be that smaller leagues and organizations did not have the resources to match the scale of content operations bigger organizations had, but more and more we see the technology is making that possible."

Jaume Pons, Head of Social Media and Digital Content at LA LIGA:

"

We know fans' expectations for a more immersive and personalized experience mean we always have to keep innovating. If fans want it, then there is business related, so the solution will follow. Fans are demanding, and the technology will have to keep up, and as soon as it will, sports organizations will be there to use it."

The Player-Team Tension (And How to Navigate It)

Gen Z feels more connected to individual athletes (31%) than teams (27%). This new reality creates an audience risk: when the star leaves, the loyalty often follows. Rights holders must anchor player stories to the club's enduring identity.

Martin Aurenche, CMO at LFP:

"

The team's stories are the most important thing, and telling their stories is part of the infrastructure of a good league. Tell the story of the clubs, the stadiums, the cities, the communities, the history and the players are a part of it. Otherwise, you are risking having a huge churn in fans, because players move teams. That way, some fans will stay even if their favorite player moves on."

Martino Armanini, Business Intelligence Global Director at Kings League:

"

As your players are becoming bigger, you can tap into that potential. But there is probably a critical mass after which you will not follow more players... The investment on that content will start to yield a diminishing return. So to me, it means to never give up on the team- or league-driven content."

Diccon Lloyd-Smeath, Producer at DAZN:

"

Some players carry an entire market with them, and when they leave, teams and leagues must be preemptive. If you have an athlete who captures an audience for you, you must use that time to capitalize on that attention and help those fans identify with you. Cause once they're gone, they're gone, and now it's reacquiring them from scratch."

Jordan Levin, Media Executive & Strategic Advisor, Former NFL CCO:

"

A lot of rights holders have ignored their local markets in favor of global reach. That's a mistake. In an increasingly digital world, sports teams still provide real-world ritual and community."

The strategic middle ground is acknowledging both.

Andrea Ballo, Digital, Social, and OTT at Juventus:

"

After Cristiano Ronaldo left, we had to fill a hole, and we did that by scaling our content output, more originals, more short videos, developed a creator lab. We used to be all in 100% only reliant on 'broadcast media' deals, and now it is one leg in our entire content strategy."

The technical barrier to providing this scale of content is collapsing, shifting power dynamics in the process.

Lucia Alcaraz, Digital Strategy at Liga F:

"

Not everyone has the biggest stars in the world, and players come and go. Players should play a role, but as part of the story of the club."

Real-Time, Always-On: How Gen Z Actually Follows Sports

The fragmentation of broadcast viewing means that loyalty must be earned through the personalized content experience. Personalization is the key infrastructure for audience retention and growth.

Joshua Barbarotta, Senior Director, Digital Video Content at ESPN

"

Explicit personalization is the defining competitive edge. Fans expect platforms to know which teams, players, and moments they care about most and to surface that content instantly and intelligently. Those who can put that notion at the forefront of their content strategy will win."

Ashley Hover, Multimedia Content at Premier League:

"

We are well aware that the younger the fan, the more they are into players, and with the right technology, we are easily serving our fans content about precisely what they prefer. The mindshift has already happened. We see leagues, clubs, and players alike understanding that this is an ecosystem that benefits from working together."

Anouk Mertens, Global CEO at Neo Studios:

"

Gen Z turns to TikTok and Instagram anyhow, so sports content falls into that pattern naturally. And they prefer connecting with human beings, less so with logos, and the athletes are already active on social platforms. So that's who sports organizations need to work with to get to younger generations."

Joshua Barbarotta, Senior Director, Digital Video Content at ESPN

"

You have to meet Gen Z where they are. Tailor your content to each specific platform through an understanding of the audience and their user behavior. This demo engages with high volume, high relevance, and constant iteration. Success depends on meeting them natively, not expecting them to come to you."

The content must move at the speed of the feed.

Personalization as Retention Infrastructure

For younger fans, the sports experience is no longer solely anchored to a scheduled broadcast. It is a continuous, *real-time* narrative consumed through quick, personalized highlights in the feed.

Marc Ciampa, VP Digital Media at New Jersey Devils:

"

More and more, younger audiences will "follow" the game live but not necessarily watch it. They'll get real time updates through highlight clips and commentary. So rights holders should focus on creating real time, always-on access that fits how younger audiences actually consume sports. They still care about the product, but they connect through short moments on apps and social media. Harnessing real time commentary, showing who players are in the in-between moments, and letting fans "follow" the team in the same way they follow creators - is critical."

Jordan Levin, Media Executive & Strategic Advisor, Former NFL CCO:

"

Nearly all of sports media is targeted towards the top-third of avid fans. But who is actually speaking to the other two-thirds? To grow the ecosystem and justify media investments, rights holders must cast a wider net.

Sandra Rodriguez-Navia, Digital Strategy at Liga F:

> "To manage in a reality of re-acquisition, sports organizations must build and maintain an ever-evolving database. This is no longer a nice-to-have, but something anyone engaging with fans must advance towards right now."

Mateo Garcia, Founder at Condor Media:

> "The next best thing is to get the feeling that the team knows them. That's the power of personalization. When you give them content that makes them feel that you know them, they will respond with more engagement and even more purchases."

Athletes and Creators as Core Ecosystem

Gen Z is influenced by creators. Rights holders must shift their perspective from viewing athletes and creators as simple distribution channels to seeing them as integral, authentic parts of the content creation ecosystem.

Julien Segui, Head of Content at Euroleague:

> "Athletes should be viewed not as partners for content distribution but as integral players in the content creation ecosystem. They are, many of them, simply creators. If sports organizations want to reach more fans, more authentically, and of younger generations especially, this has to be an integral part of their content strategy."

Martino Armanini, Business Intelligence Global Director at Kings League:

> "There is not really another way. Jannik Sinner has his own YouTube channel, Erling Haaland has his own YouTube channel. They all build their own brands, and monetize them on their own channels."

Tomas Olabarri, Content Lead at Publicis:

"

The lives of the people behind the sport are maybe the most interesting thing for younger audiences. Young fans may watch a fraction of a game once, a highlight one more time, but they can't get enough clips of Lamin Yamal's life."

Jordan Levin, Media Executive & Strategic Advisor, Former NFL CCO:

"

Focus on stories, not just hot takes, headlines, and hype reels. If you're not telling stories and getting an audience to care, then it's all just noise."

Mateo Garcia, Founder at Condor Media:

"

If you can deliver authentic snippets, behind-the-scenes context, and quick-hit storytelling as things happen, you give younger fans a way to stay emotionally invested even if they didn't watch the broadcast. And you can monetize them."

"Right now, too many rights holders are still building content for traditional viewing habits instead of how people consume sports today. They rely heavily on polished, longform, broadcast-driven material when fans are engaging through quick updates, personality moments, and immediate context around what just happened. The miss is assuming that posting highlights alone is enough; audiences need analysis, storytelling, access, and real-time connection. If you're not providing that, you're losing relevance even if your product is strong."

Takeaway

The generational data makes the trends clear. The industry voices make the strategy urgent. **Personalization is infrastructure. Athletes are creators. Real-time is the new live.** And **innovation can't wait.**

05

Appendix

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This section puts numbers behind the story. It shows how each generation watches, discovers, and connects, and what those patterns reveal about where fandom is heading. The data here turns behavior into proof and trends into direction.
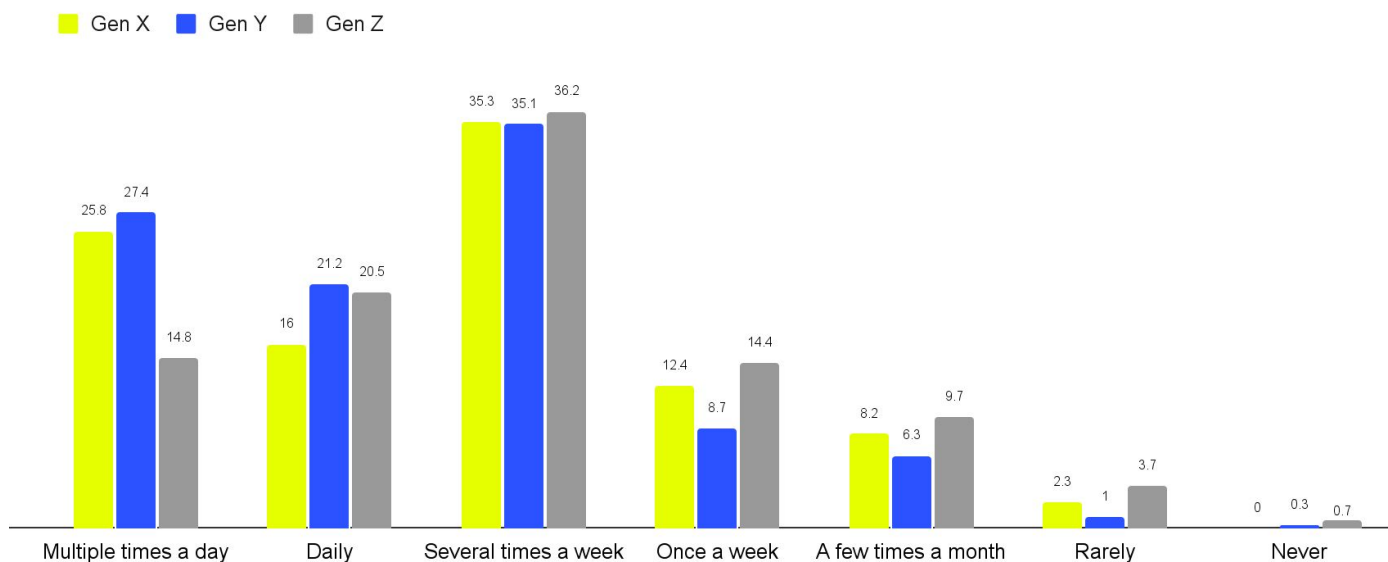
Question 1:

In 2025, how often did you watch sports content in a typical week?

Viewing is habitual across all generations, with the strongest daily cadence among Millennials and a lighter rhythm for Gen Z.

What it shows:

- Millennials remain the **most reliable daily audience**, which supports stronger retention and LTV.
- Gen Z is **42% less likely** than Gen X and **46% less likely** than Gen Y to watch **multiple times a day**.
- Gen Z is **270% more likely** than Gen Y and **61% more likely** than Gen X to watch **rarely**.
- Gen Z is **700% more likely** than Gen X and **133% more likely** than Gen Y to **never** watch sports content.

Prioritize daily highlight loops and story formats to turn Gen Z's frequent weekly touchpoints into repeat daily sessions while deepening Millennial habit.

Legend: ■ Gen X ■ Gen Y ■ Gen Z

| Category	Gen X	Gen Y	Gen Z
Multiple times a day	25.8	27.4	14.8
Daily	16	21.2	20.5
Several times a week	35.3	35.1	36.2
Once a week	12.4	8.7	14.4
A few times a month	8.2	6.3	9.7
Rarely	2.3	1	3.7
Never	0	0.3	0.7

Question 2:

How would you describe your level of sports fandom?

Fandom is strong across all groups, with Millennials the most committed and Gen Z more event-led.

What it shows:

- **Die-hard/regular fans:** Gen Y **84.7%**, Gen X **80.4%**, Gen Z **73.9%**.
- **Gen Z is 28.3% less likely** than Gen Y to call themselves "die-hard."
- **Gen Z is 76% more likely** than Gen Y to describe themselves as **casual**.
- **Gen Z is 310% more likely** than Gen X (and **46%** more than Gen Y) to say **"not a fan."**

Center loyalty products and premium experiences on Millennials and deploy creator-led, moment-driven formats to convert Gen Z's casual interest into repeat engagement.
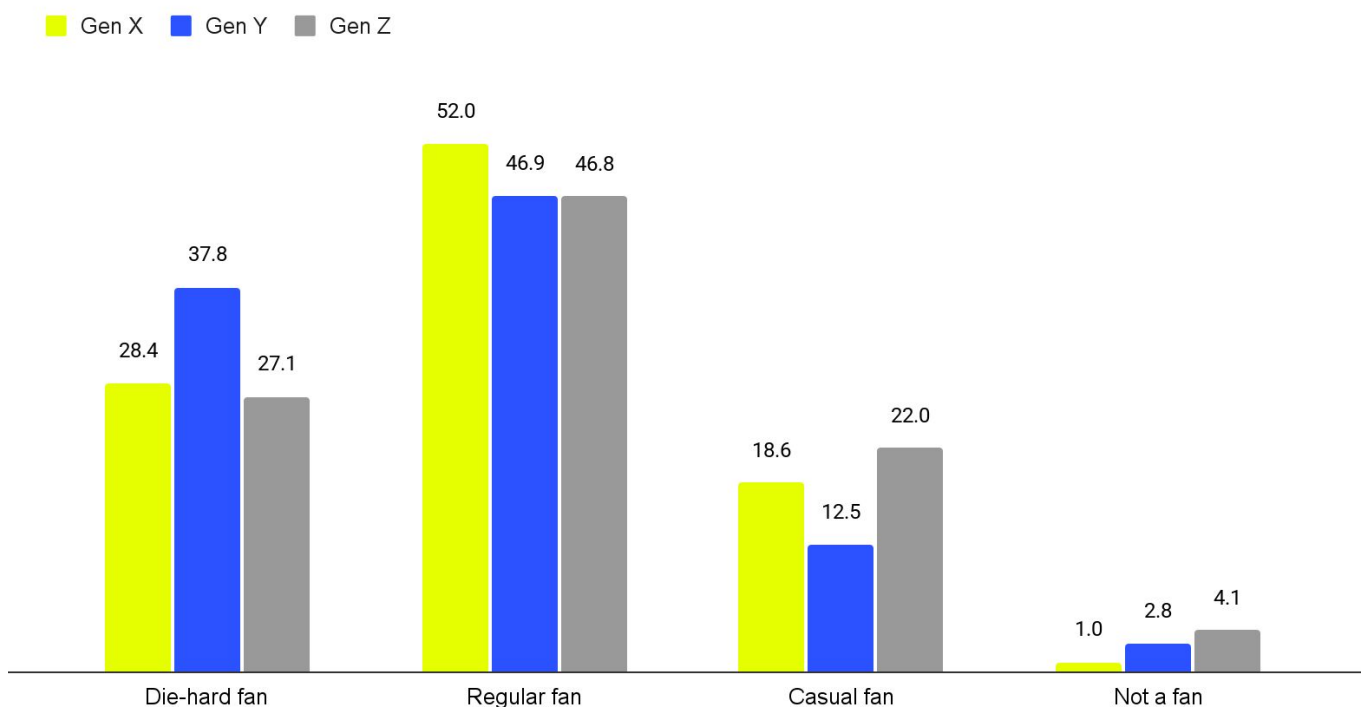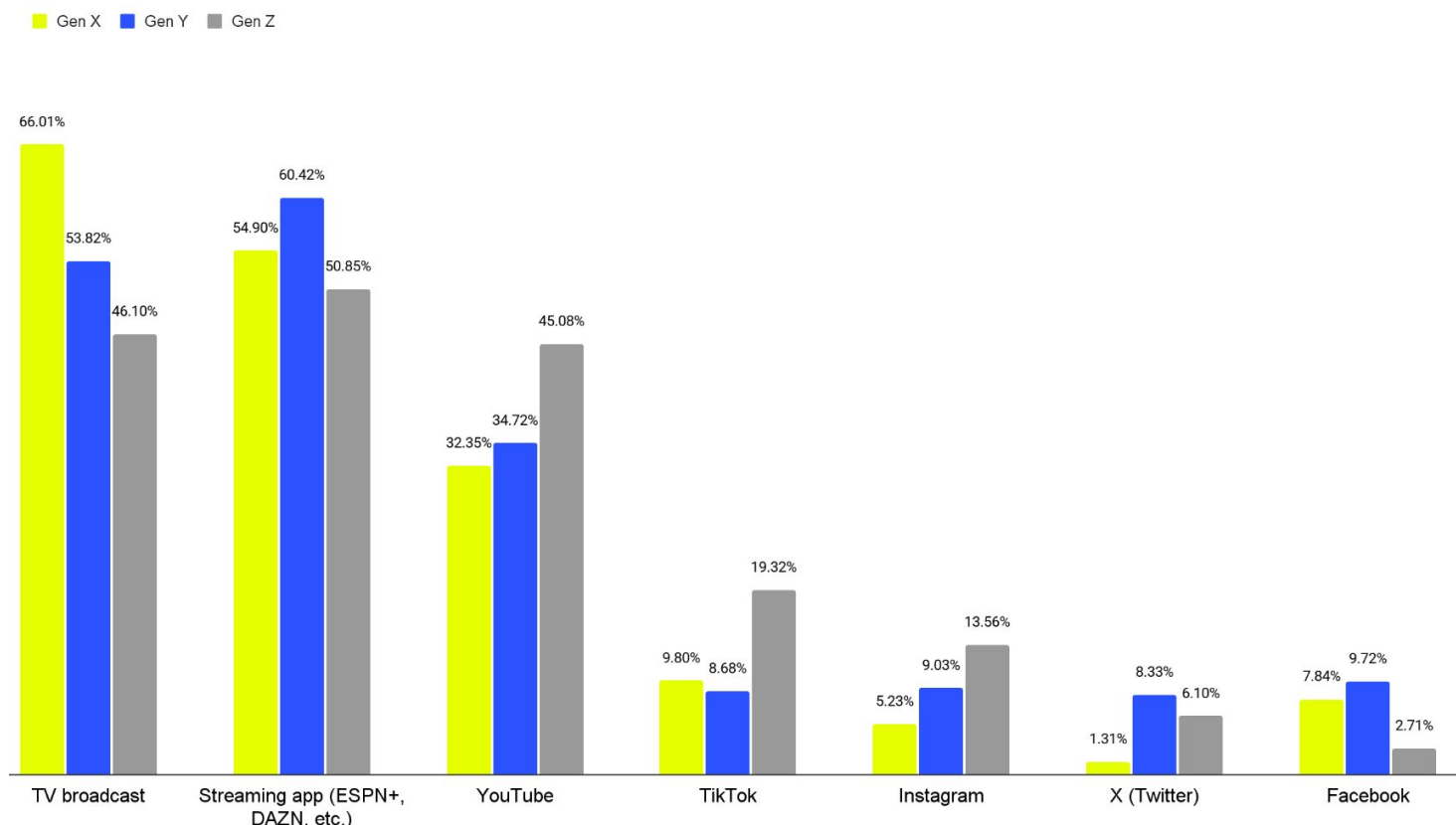
Question 3:

Which platforms did you use most for consuming sports content this year? (select up to 2)

Fandom is strong across all groups, with Millennials the most committed and Gen Z more event-led.

What it shows:

- **Streaming apps dominate younger audiences:** Gen Y **65.4%**, Gen Z **55.4%**, Gen X **30.9%**.
- **Gen Z is 30% less likely to name TV broadcast** among their top two platforms compared to Gen X, and **14% less likely** than Gen Y.
- **YouTube is the new common ground:** Gen Z **49.1%**, Gen Y **37.6%**, Gen X **18.2%**, Gen Z is **39% more likely** than Gen X and **30% more likely** than Gen Y to rely on it.
- **Gen Z's feed-first mindset is clear:** they're **65% more likely** than Gen X and **49% more likely** than Gen Y to name **YouTube, TikTok, or Instagram** as their top viewing sources.

Plan live for TV and streaming, build daily reach through YouTube, and use TikTok and Instagram to drive discovery and highlight consumption among younger fans.
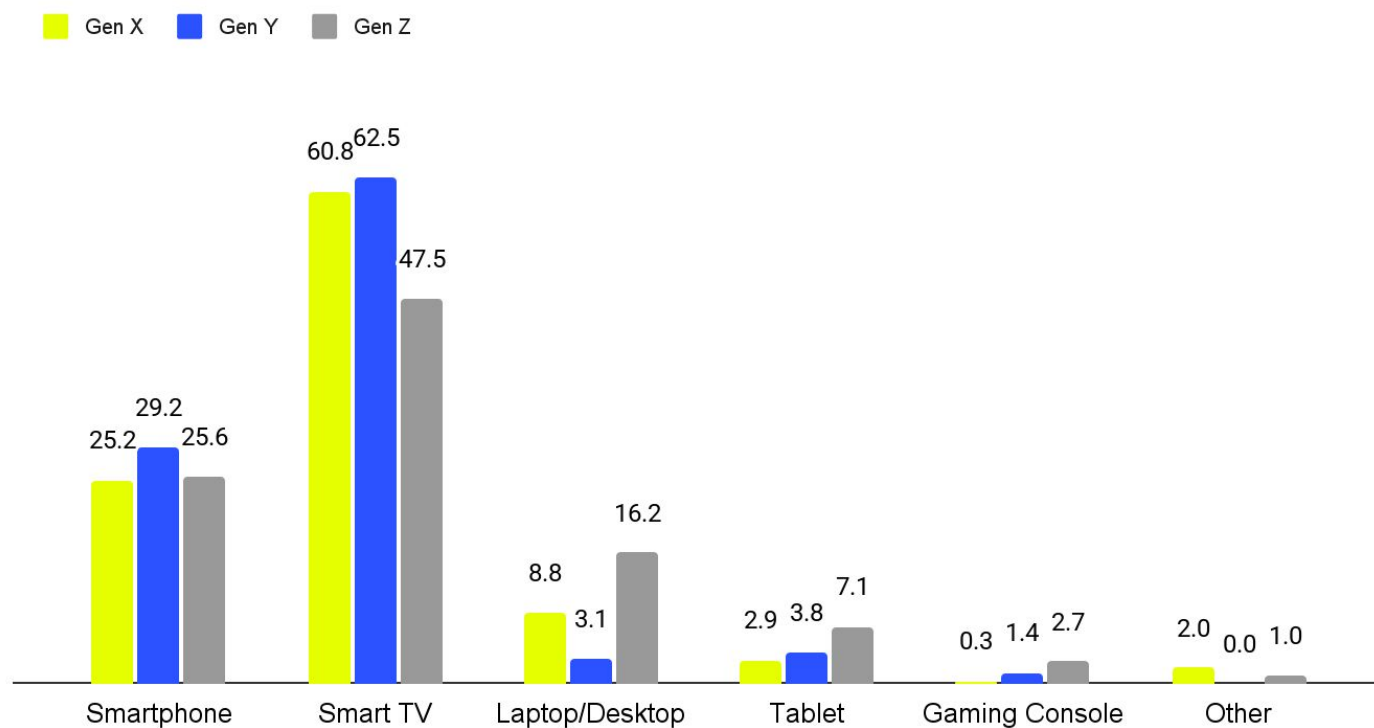
Which device did you most often use to watch sports content?

Smart TVs remain dominant overall, but younger fans are spreading viewing across more personal and mobile devices.

What it shows:

- **Smart TVs dominate overall**, averaging **56.9%** across generations (Gen Y **62.5%**, Gen X **60.8%**, Gen Z **47.5%**).
- **Gen Z is 97% more likely** than Gen X and **235% more likely** than Gen Y to name a **laptop or tablet** as their main device for sports.
- **Gen Z is 800% more likely** than Gen X and **93% more likely** than Gen Y to use a **gaming console** as their primary screen showing how sports blends with broader entertainment. **Smartphones are universal**, used by roughly a quarter of all fans, proving mobile is now a baseline behavior, not a generational differentiator.

Smart TVs still anchor live viewing, but Gen Z's multi-device behavior reflects a habit of snacking and multitasking across platforms. Content needs to be optimized for smaller screens, shorter attention spans, and seamless transitions between devices.

Legend: Gen X, Gen Y, Gen Z

| Device	Gen X	Gen Y	Gen Z
Smartphone	25.2	29.2	25.6
Smart TV	60.8	62.5	47.5
Laptop/Desktop	8.8	3.1	16.2
Tablet	2.9	3.8	7.1
Gaming Console	0.3	1.4	2.7
Other	2.0	0.0	1.0

Question 5:

What types of sports content did you watch most in the past 12 months? (select up to 2)

Live games still lead. But younger fans balance them with condensed replays, short-form clips, and athlete-driven stories.

What it shows:

- **Full live games rank #1** overall: **~79% average** across respondents (Gen Y **88.9%**, Gen Z **74.7%**, Gen X **50.8%**).
- **Gen Z is 71% more likely** than Gen X and **39% more likely** than Gen Y to pick **short-form (≤2 min)** or **very short-form (≤30 sec)** as a top-two content type.
- **Gen Z is 162% more likely** than Gen X and **35% more likely** than Gen Y to choose **athlete-driven** or **behind-the-scenes** content.
- **Condensed replays** track higher for younger fans (~**35%** for Gen Y and Gen Z vs **18%** Gen X), reinforcing on-demand habits.

Millennials and Gen Z mix live and on-demand content seamlessly. To deepen engagement, pair live moments with snackable highlights and athlete storytelling that keeps fans connected between games.
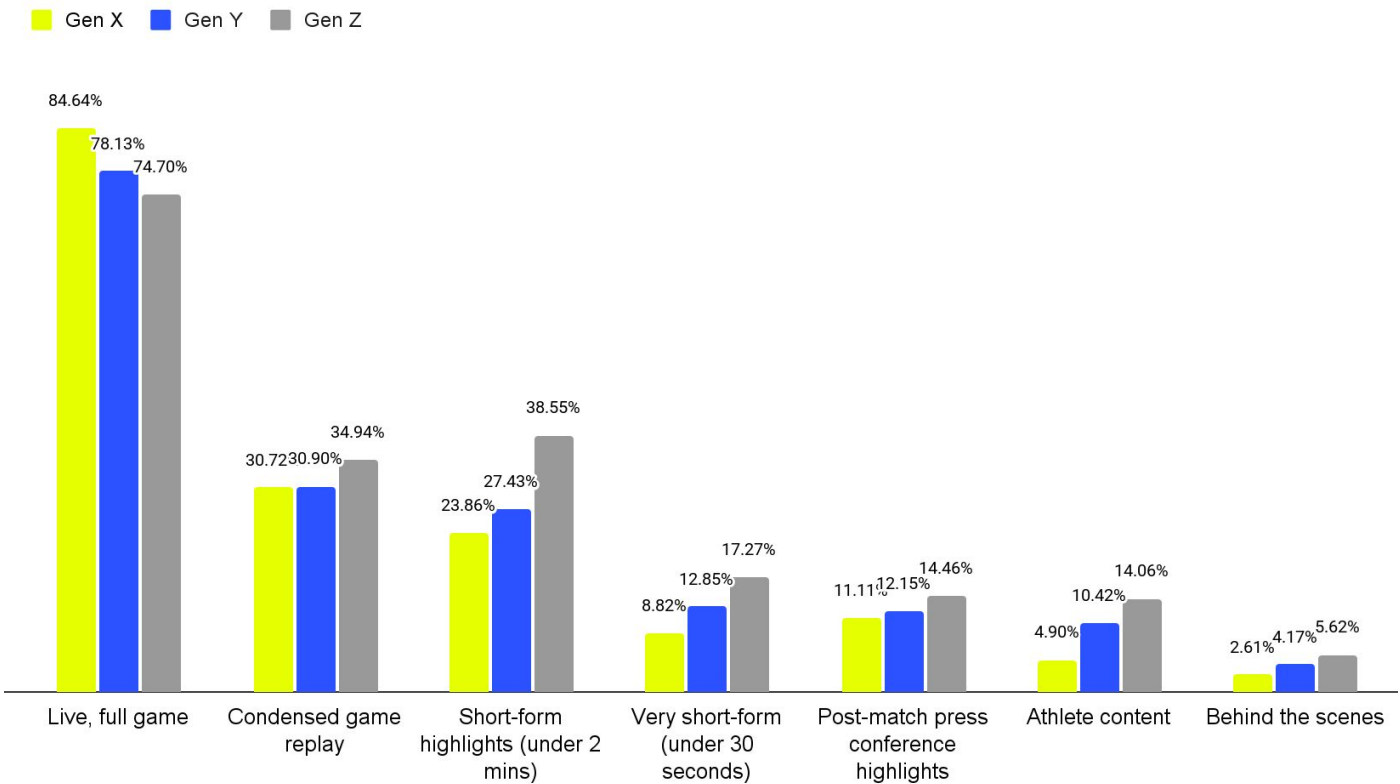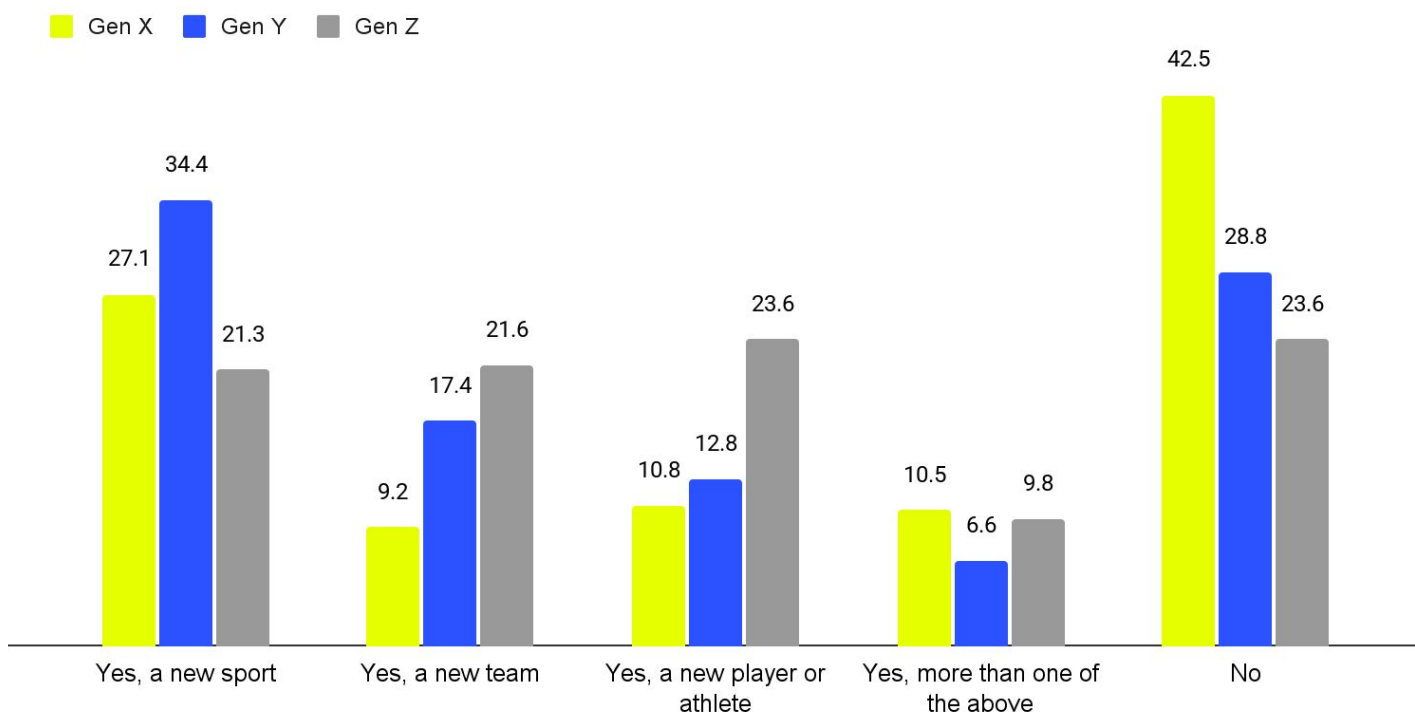
Question 6:

In the past 12 months, have you started actively following a new sport, team, or player?

Fandom is fluid, especially among younger fans, with Gen Z the most likely to add new interests.

What it shows:

- **Any new follow:** Gen Z **~76%**, Gen Y **~71%**, Gen X **~58%**.
- **Gen Z is 32.7% more likely** than Gen X, and **7.2% more** than Gen Y, to start following **something new**.
- **Gen Y leads on new sports: 34.4%**, and is **61.5% more likely** than Gen Z to say they started following a **new sport**.
- **Gen Z leads on new athletes: 23.6%** vs **12.8%** Gen Y, **84.3% more likely** to start following a **new athlete** than Gen Y.
- **New teams:** Gen Z **21.6%**, Gen Y **17.4%**, Gen X **9.1%**.
- **Most static:** Gen X "No" at **~42%**, indicating mature, stable fandom.

Use athlete storytelling, short highlights, and social-native discovery to convert Gen Z and Millennial curiosity into ongoing engagement loops.

Legend: Gen X (yellow), Gen Y (blue), Gen Z (grey)

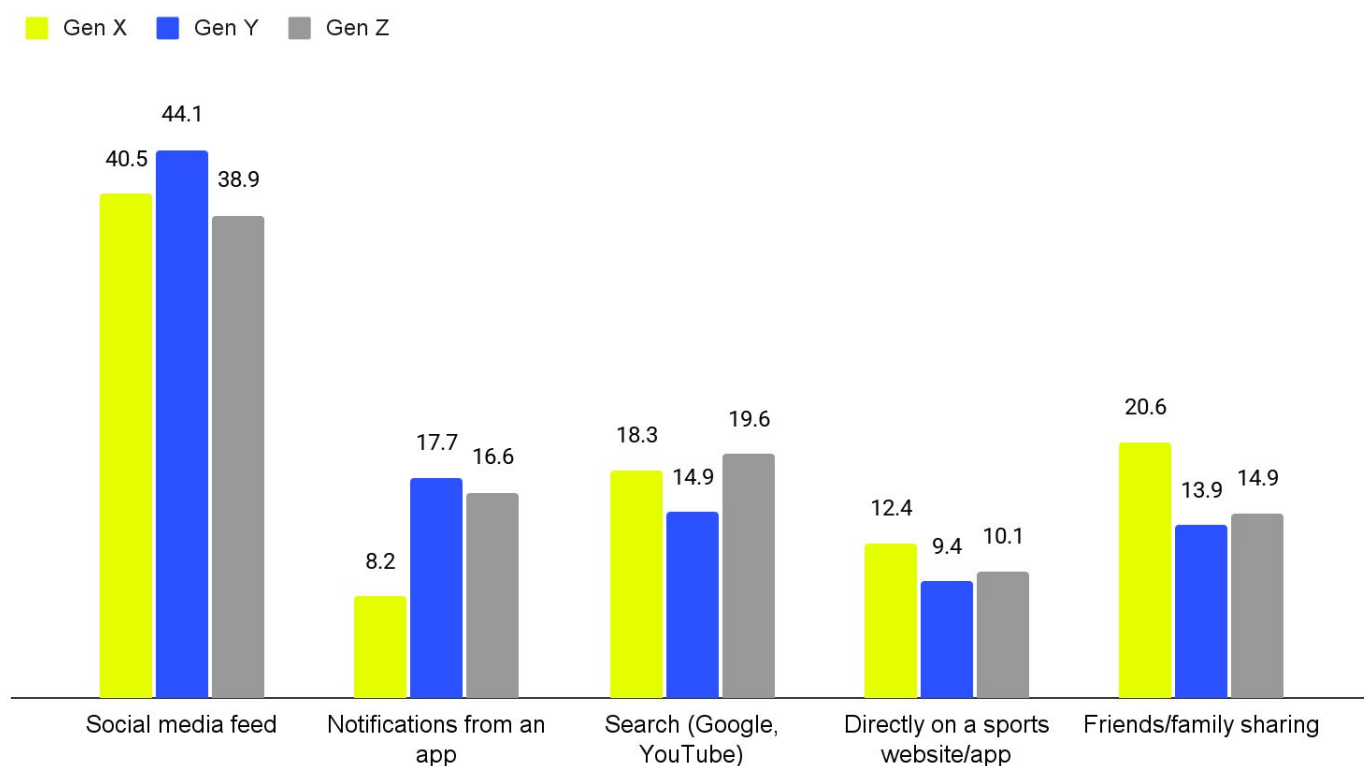| Category	Gen X	Gen Y	Gen Z
Yes, a new sport	27.1	34.4	21.3
Yes, a new team	9.2	17.4	21.6
Yes, a new player or athlete	10.8	12.8	23.6
Yes, more than one of the above	10.5	6.6	9.8
No	42.5	28.8	23.6

How do you usually discover new sports content, for example, a new player, team or sport you didn't know?

Social feeds lead discovery for all groups, with younger fans also responding to in-app prompts.

What it shows:

- **Social media is #1** for discovery across all groups: **38.9–44.1%**.
- **Search (incl. YouTube) is #2** overall, averaging **~17.6%** (range **14.9–19.6%**).
  App notifications carry more weight with younger fans: **Gen Y 17.7%**, **Gen Z 16.6%**, vs **Gen X 8.2%**.
- **Direct visits** to sports sites/apps are low across cohorts (**~9–12%**).
- **Friends/family sharing** stands out most for **Gen X (20.6%)**.

Bridge social discovery to owned experiences. Use personalized notifications to pull Gen Y and Gen Z from the feed into sessions where they can build habit.

Legend: Gen X, Gen Y, Gen Z

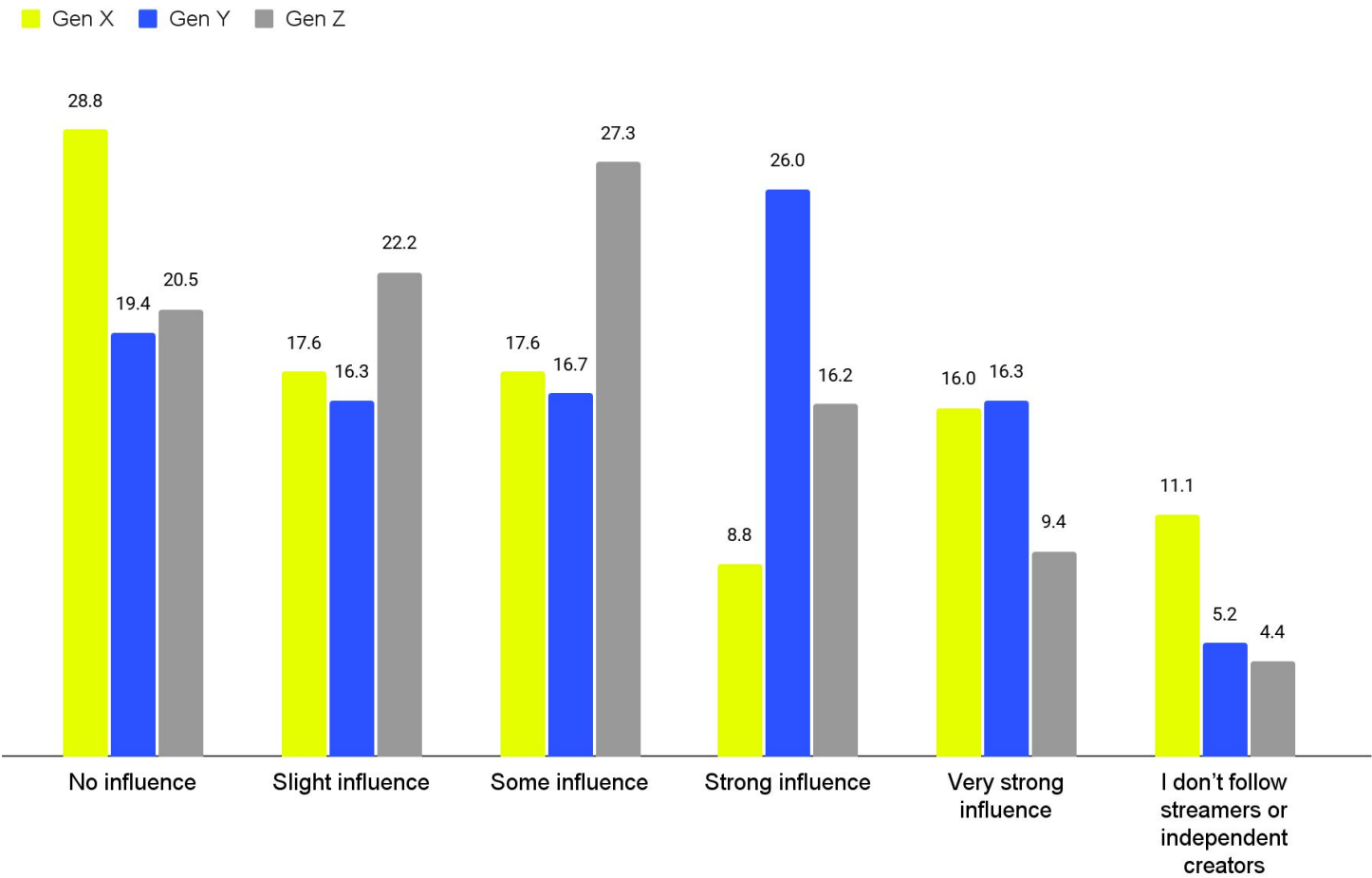|	Gen X	Gen Y	Gen Z
Social media feed	40.5	44.1	38.9
Notifications from an app	8.2	17.7	16.6
Search (Google, YouTube)	18.3	14.9	19.6
Directly on a sports website/app	12.4	9.4	10.1
Friends/family sharing	20.6	13.9	14.9

Question 8:

How much do streamers and independent content creators influence the way you follow sports?

Creators shape fan behavior most for Millennials and Gen Z, with different intensity profiles.

What it shows:

- **Roughly 1 in 2 fans** across all generations report **"some" to "very strong" influence** from independent creators on how they follow sports.
- **Influence strength grows with youth:** Gen Y **~59%**, Gen Z **~53%**, Gen X **~42%**.
- **Millennials show the most intensity**, with **26%** describing creator influence as "strong," compared to **16%** for Gen Z and **9%** for Gen X.
- **Gen Z's relationship is broader**, they follow more creators, but each with less individual weight, reflecting a culture of discovery and variety.

Treat creators and athletes as distribution partners. Build creator-style programming and collaborations to shape relevance for Gen Z, while offering deeper, premium creator integrations for Millennials who respond to higher influence.

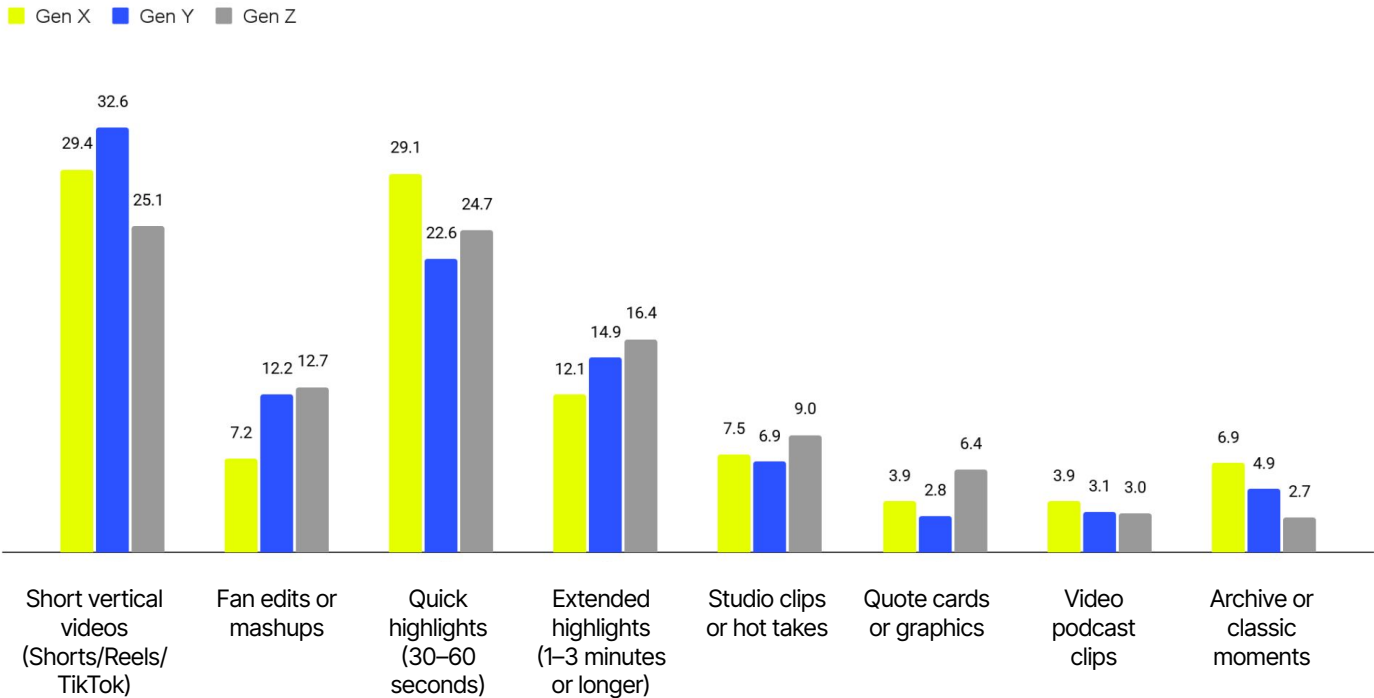|	Gen X	Gen Y	Gen Z
No influence	28.8	19.4	20.5
Slight influence	17.6	16.3	22.2
Some influence	17.6	16.7	27.3
Strong influence	8.8	26.0	16.2
Very strong influence	16.0	16.3	9.4
I don't follow streamers or independent creators	11.1	5.2	4.4

Question 9:

When you share sports content, what format are you most likely to share?

Short-form video dominates across all generations, though Gen Z adds a creative, remix-driven layer.

What it shows:

- **Short vertical videos** remain the top shared format across all generations: **Gen Y 32.6%**, **Gen X 29.4%**, **Gen Z 25.1%**.
- **Quick highlights (30–60 seconds)** come next, making up roughly half of all shared content when combined with short vertical clips.
- **Gen Z is 76% more likely** than Gen X to share **fan edits/mashups**, and **twice as likely** to share **quote cards or graphics**, showing active participation in creator-style culture.
- **Gen X is 41% more likely** than Gen Y and **156% more likely** than Gen Z, to share **archive or classic moments**, signaling a stronger connection to sports history.

Short, vertical, emotionally charged video is now the universal sharing language. To drive fan-to-fan reach, deliver highlights in native vertical formats and enable remixing or co-creation for Gen Z audiences.

Legend: Gen X, Gen Y, Gen Z

| Format	Gen X	Gen Y	Gen Z
Short vertical videos (Shorts/Reels/TikTok)	29.4	32.6	25.1
Fan edits or mashups	7.2	12.2	12.7
Quick highlights (30–60 seconds)	29.1	22.6	24.7
Extended highlights (1–3 minutes or longer)	12.1	14.9	16.4
Studio clips or hot takes	7.5	6.9	9.0
Quote cards or graphics	3.9	2.8	6.4
Video podcast clips	3.9	3.1	3.0
Archive or classic moments	6.9	4.9	2.7

Question 10:

How many paid streaming services do you currently use to watch sports?

Most fans pay for multiple services, led by Millennials, while Gen Z clusters at one or two.

What it shows:

- **At least one subscription: 86.5%** on average across generations.
- **Two or more services: Gen Y 68.0%**, **Gen X 66.9%**, **Gen Z 54.4%**.
  Two is the most common mix: 31.2% overall (range **30.2–32.8%** across generations).
- **Gen Z is 82.9% more likely** than Gen X and **42.1% more likely** than Gen Y to have **only one** subscription.
- **Heavy stackers skew older: 3+ services** - **Gen Y 37.8%**, **Gen X 36.2%**, **Gen Z 21.6%**.
- **Top tier fatigue for Gen Z: 4+ services** - **4.7%** vs **17.7%** Gen Y and **15.0%** Gen X.

Build premium bundles and add-on value for Millennials and older fans. Offer flexible access, freemium paths, and highlight-rich companions for Gen Z, who participate widely but stack fewer paid services.
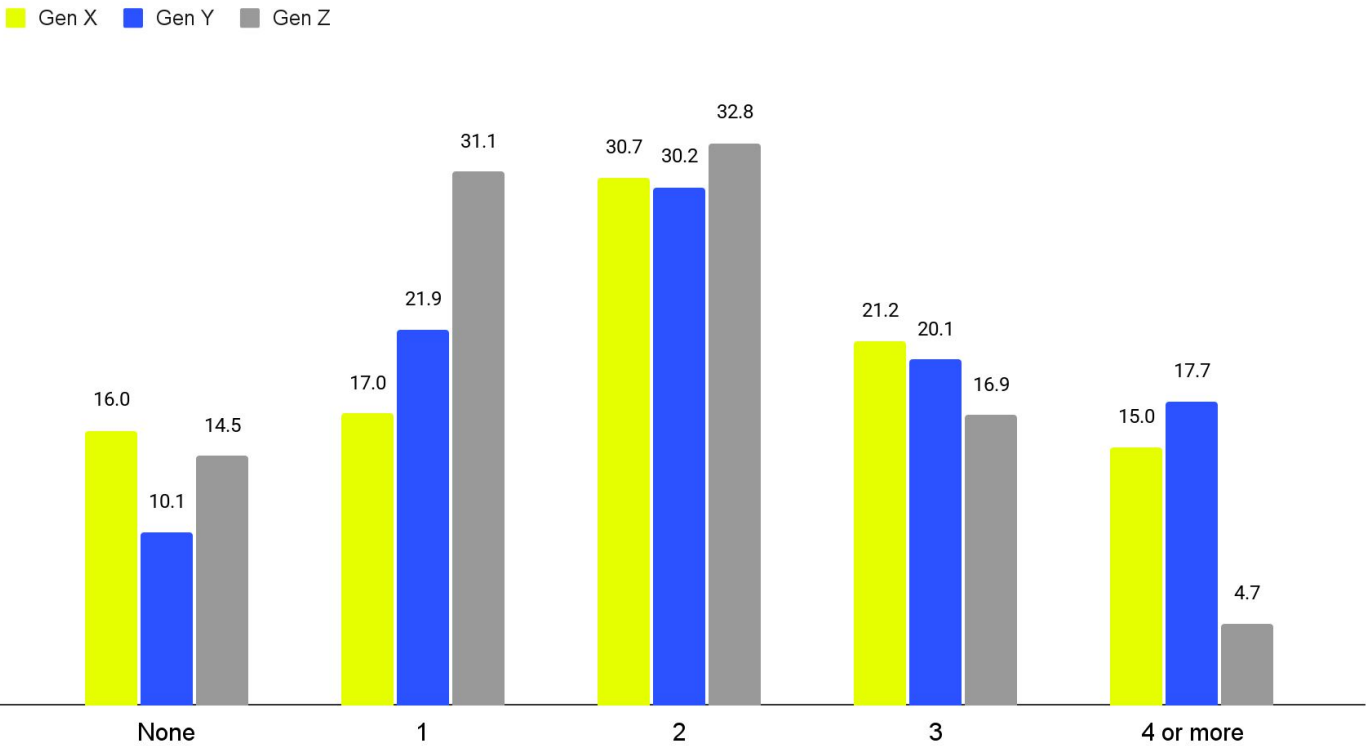
Question 11:

Have you ever canceled or switched a sports streaming subscription due to a lack of personalized content?

Personalization quality directly drives churn, with Millennials the most sensitive.

What it shows:

- **Yes (churn due to poor personalization): Gen Y 56.3%**, **Gen X 52.0%**, **Gen Z 48.5%**.
- **No: Gen Z 51.5%**, consistent with heavier use of free/algorithmic platforms and fewer stacked paid subs.
- **Millennials are the most sensitive** cohort; they subscribe broadly and move quickly when experiences feel generic.

Treat personalization as retention infrastructure. Use preference signals and player or team affinity to surface relevant highlights. This will help reduce the risk of switching, with special focus on Millennials who churn quickest.

Legend: ■ Gen X ■ Gen Y ■ Gen Z

Yes: Gen X 51.9, Gen Y 56.3, Gen Z 48.4
No: Gen X 48, Gen Y 43.8, Gen Z 51.5
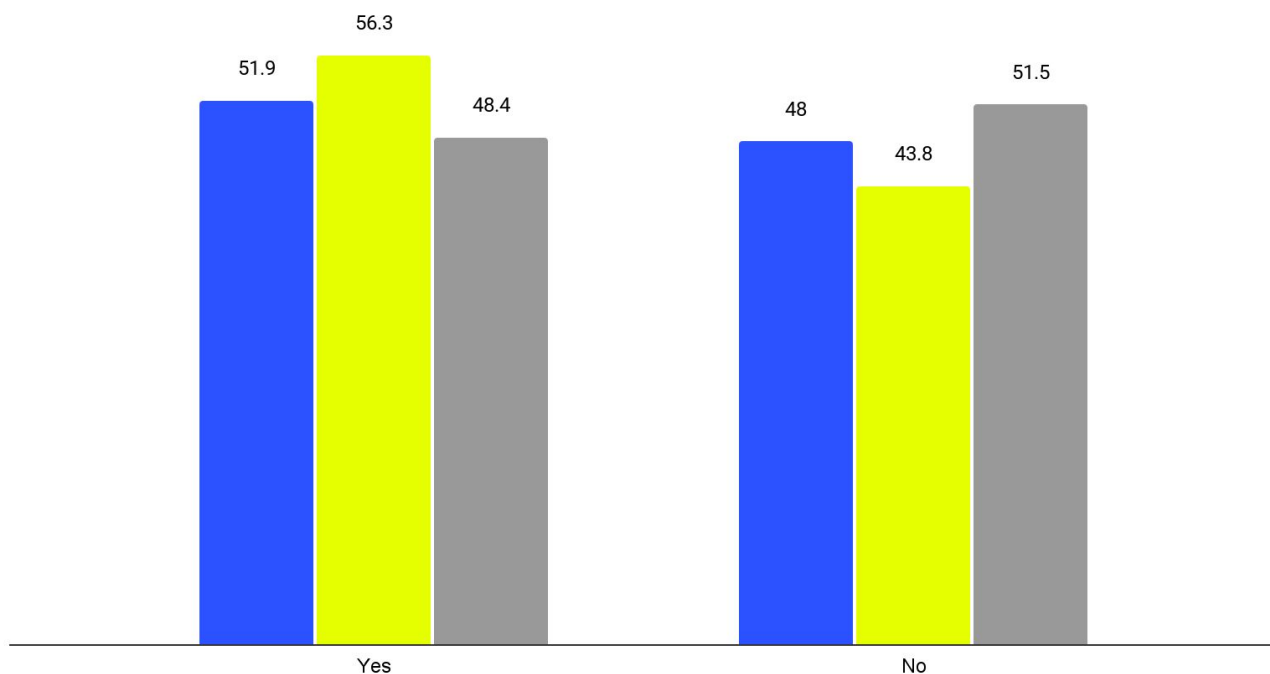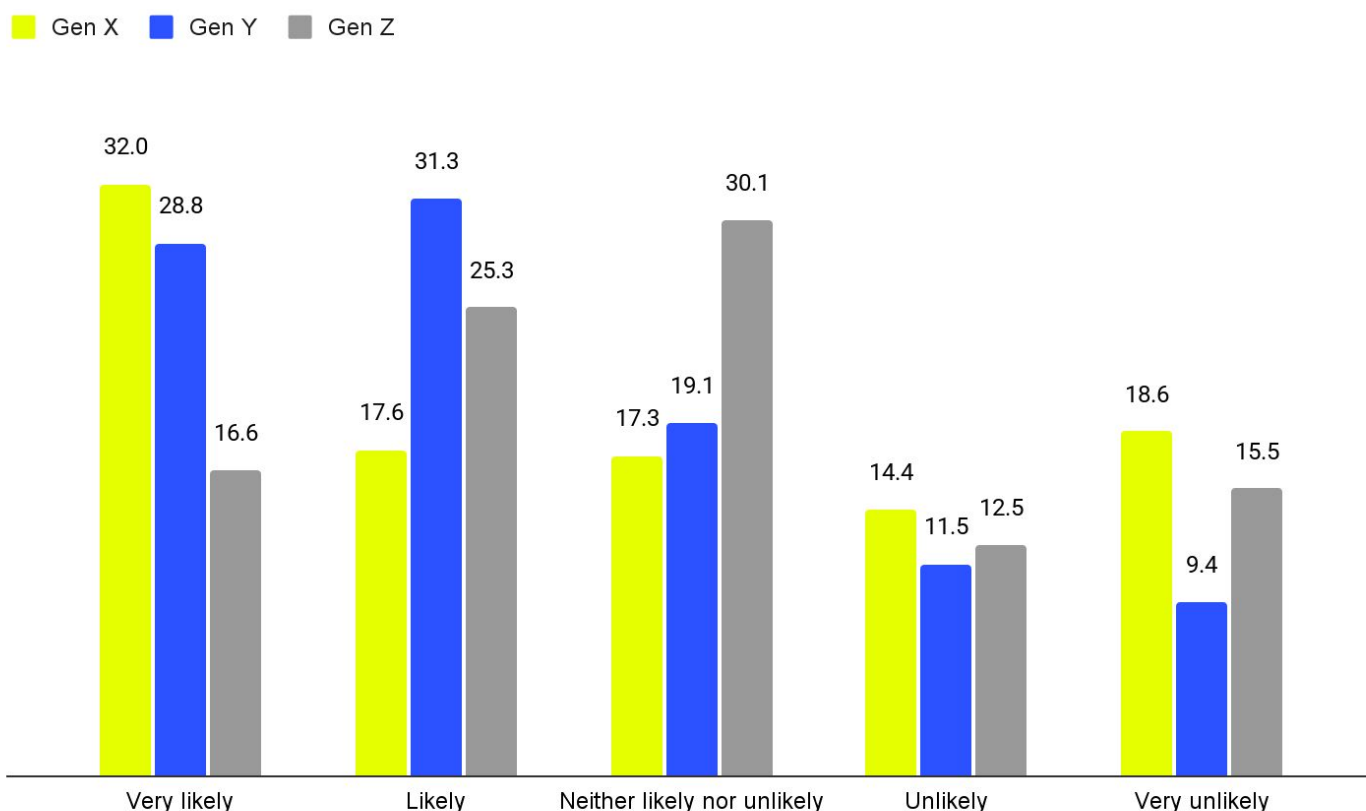
Question 12:

How likely are you to sign up for more sports streaming services in 2026?

Millennials are most open to adding services, while Gen Z is cautious and more often neutral.

What it shows:

- Likely or very likely: **Gen Y 60.1%, Gen X 49.7%, Gen Z 41.9%.**
- Unlikely or very unlikely: **Gen X 33%, Gen Y 20.9%, Gen Z 28%.**
- **Neutral is highest among Gen Z at 30.1%,** indicating wait-and-see behavior.
- Millennials combine current subscription depth with future intent, the clearest growth audience.
- **Forward demand exists: 50.5%** of all respondents say they are **likely/very likely** to add services in **2026**.
- **Growth risk with younger fans: Gen Z is 15% less likely** than Gen X and **30% less likely** than Gen Y to add another subscription in 2026.

Design premium bundles and exclusive content for Millennials, who show the strongest intent to add. Offer flexible access models and social or creator-integrated value for Gen Z, where neutrality and price sensitivity are higher.
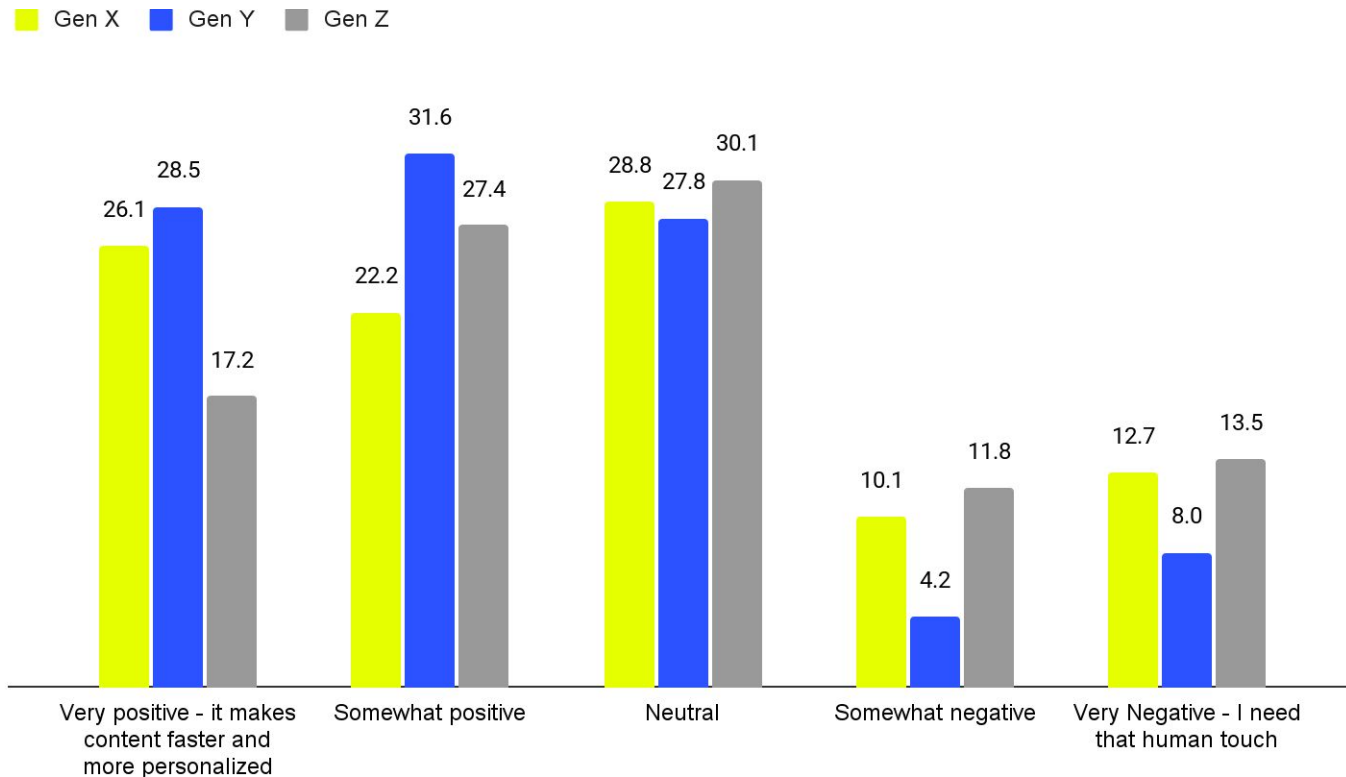
Question 13:

How do you feel about AI automation (detecting plays, indexing) being used to create sports content and highlights?

Fans are broadly positive toward AI-generated sports content, but still value the human touch.

What it shows:

- Positive sentiment (very + somewhat): **Gen Y 60.1%, Gen X 48.4%, Gen Z 44.6%.**
- Neutral: around **28–30% for all generations, indicating curiosity rather than skepticism.**
- Negative sentiment (somewhat + very): **Gen X 22.9%, Gen Z 25.3%, Gen Y 12.2%.**
- **Millennials are the most optimistic** and comfortable with AI-driven personalization.
- **Gen Z and Gen X share a cautious view,** both showing similar rates of "I need that human touch" (~13%).

Fans accept AI as long as it enhances speed, relevance, and personalization. The best approach pairs automation with human storytelling—fast, data-driven highlights enriched by emotional or narrative context that keeps fans connected.

Legend: Gen X, Gen Y, Gen Z

|	Gen X	Gen Y	Gen Z
Very positive - it makes content faster and more personalized	26.1	28.5	17.2
Somewhat positive	22.2	31.6	27.4
Neutral	28.8	27.8	30.1
Somewhat negative	10.1	4.2	11.8
Very Negative - I need that human touch	12.7	8.0	13.5

How quickly do you expect highlights after a key moment?

Older fans expect immediacy, while younger fans are comfortable catching up later through feeds.

What it shows:

- Within minutes: **Gen X 50.3%, Gen Y 35.8%, Gen Z 19.9%.**
- By end of game: **Gen Z 30.1%, Gen Y 28.8%, Gen X 17.0%.**
- Same day: **Gen Z 32.4%, Gen Y 23.6%, Gen X 22.6%.**
- Gen X shows the **highest demand for near real-time delivery** (67% within game).
- Gen Z's lower urgency reflects asynchronous, algorithm-driven consumption habits.

Speed still matters for older audiences, but relevance rules for younger ones. Gen Z's viewing is feed-based, not event-based. Publishers should prioritize algorithm timing and personalization over immediate turnaround.
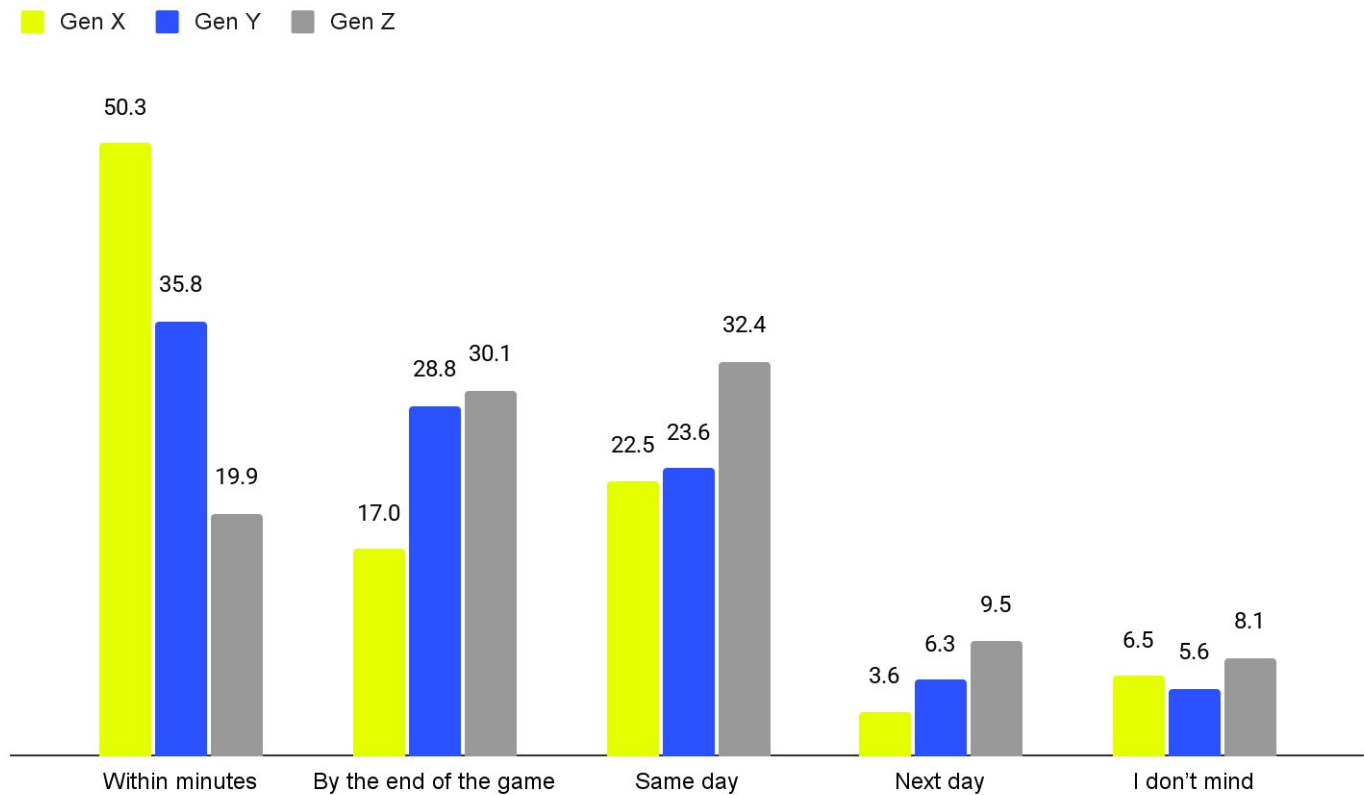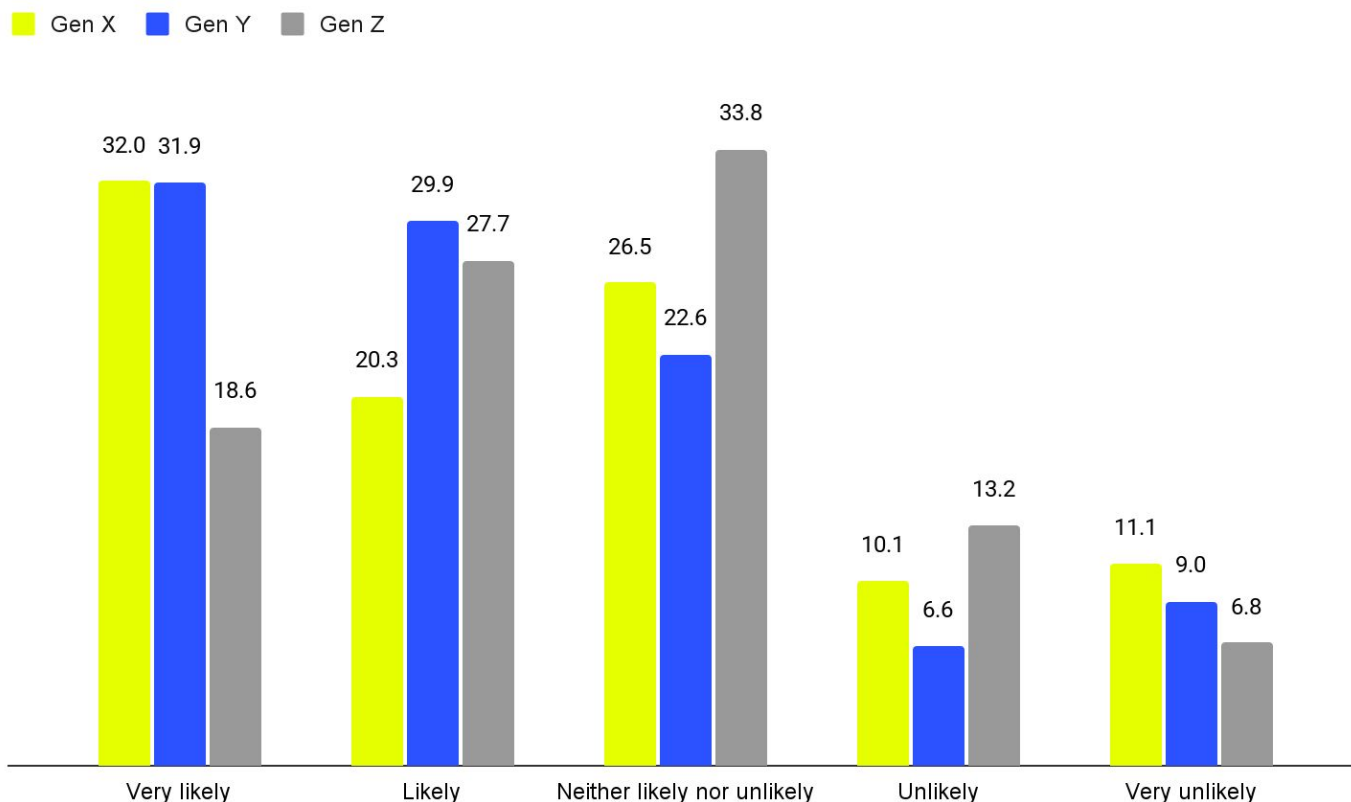
Question 15:

How likely are you to purchase merchandise or tickets through a link on a personalized highlight (tailored to your favorite team/player) vs. a generic video?

Personalization strongly increases purchase intent, especially among Millennials.

What it shows:

- **Likely/Very likely (overall): 53.5%** average across all respondents.
- **By generation (likely/very likely): Gen Y 61.8%**, **Gen X 52.3%**, **Gen Z 46.3%**.
- **Neutral (hesitation signal): Gen Z 33.8%**, interest is there, follow-through depends on relevance and timing.
- **Gen X neutrality 26.5%** indicates a need for **clear trust cues** (official branding, exclusivity).
- **Gen Z "very likely" 18.6%** suggests conversion improves with **creator credibility**, social proof, and in-moment prompts.

Personalized highlights turn engagement into commerce when executed with credibility and context. Focus personalized offers on Millennial fans who are ready to act. Test creator-led or athlete-linked drops to unlock Gen Z's latent purchase potential.
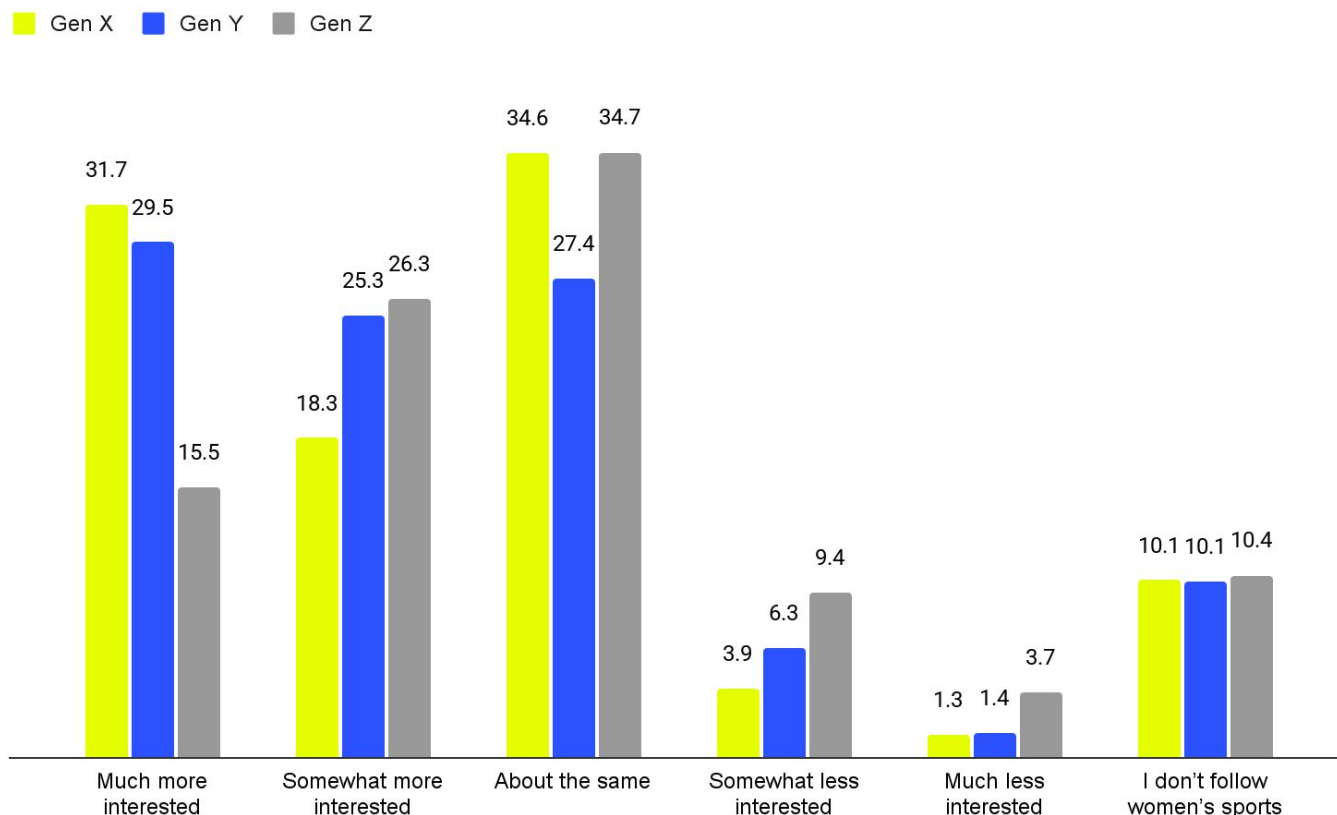
How has your interest in women's sports changed in the past year?

Interest is rising across all generations, with the strongest momentum among Millennials and a more uneven pattern for Gen Z.

What it shows:

- **Increased interest (much + somewhat): Gen Y ~54.8%, Gen X 50.0%, Gen Z ~41.8%**.
- **Gen Z is 51% less likely** than Gen X and **47% less likely** than Gen Y to say they became **"much more interested"** in women's sports this past year.
- **Declining interest: Gen Z ~13.1%** vs **Gen Y ~7.7%** and **Gen X ~5.2%**, meaning **Gen Z is 151% more likely** than Gen X and **72% more likely** than Gen Y to report decreased engagement.
- **"Much more interested" peaks among Gen X (31.7%)**, suggesting event-driven enthusiasm.
- **"I don't follow"** remains near **10%** across all generations, showing room for further reach.

Women's sports are in a growth phase. Lean into consistent highlight storytelling and athlete-led content to convert Gen Z spikes into routine engagement. Offer sponsor-ready packages and regular features to sustain Millennial and Gen X interest.

Legend: ■ Gen X ■ Gen Y ■ Gen Z

|	Much more interested	Somewhat more interested	About the same	Somewhat less interested	Much less interested	I don't follow women's sports
Gen X	31.7	18.3	34.6	3.9	1.3	10.1
Gen Y	29.5	25.3	27.4	6.3	1.4	10.1
Gen Z	15.5	26.3	34.7	9.4	3.7	10.4

Question 17:

How important is behind–the–scenes or off–the–field content in how you follow sports?

Off-field storytelling is now a core part of fandom, valued differently by each generation.

What it shows:

- **Overall importance: 78.6%** say BTS/off-field content is **at least somewhat important** (range **74.8–83%** across generations).
- **Extremely/very important: Gen Y 57.3%**, **Gen X 49.4%**, **Gen Z 38.2%**.
- **Gen Z "somewhat important" leads at 39.9%**, signaling steady consumption without labeling it essential.
- **Generational profile:** Gen Y treats off-field as an extension of live; Gen X engages selectively; Gen Z expects it in the feed, but prioritizes live moments less.

Behind-the-scenes content has become fan currency. Use it to deepen loyalty and sustain daily engagement, emotional storytelling for Millennials, short-form creator channels for Gen Z, and context-rich features for Gen X.
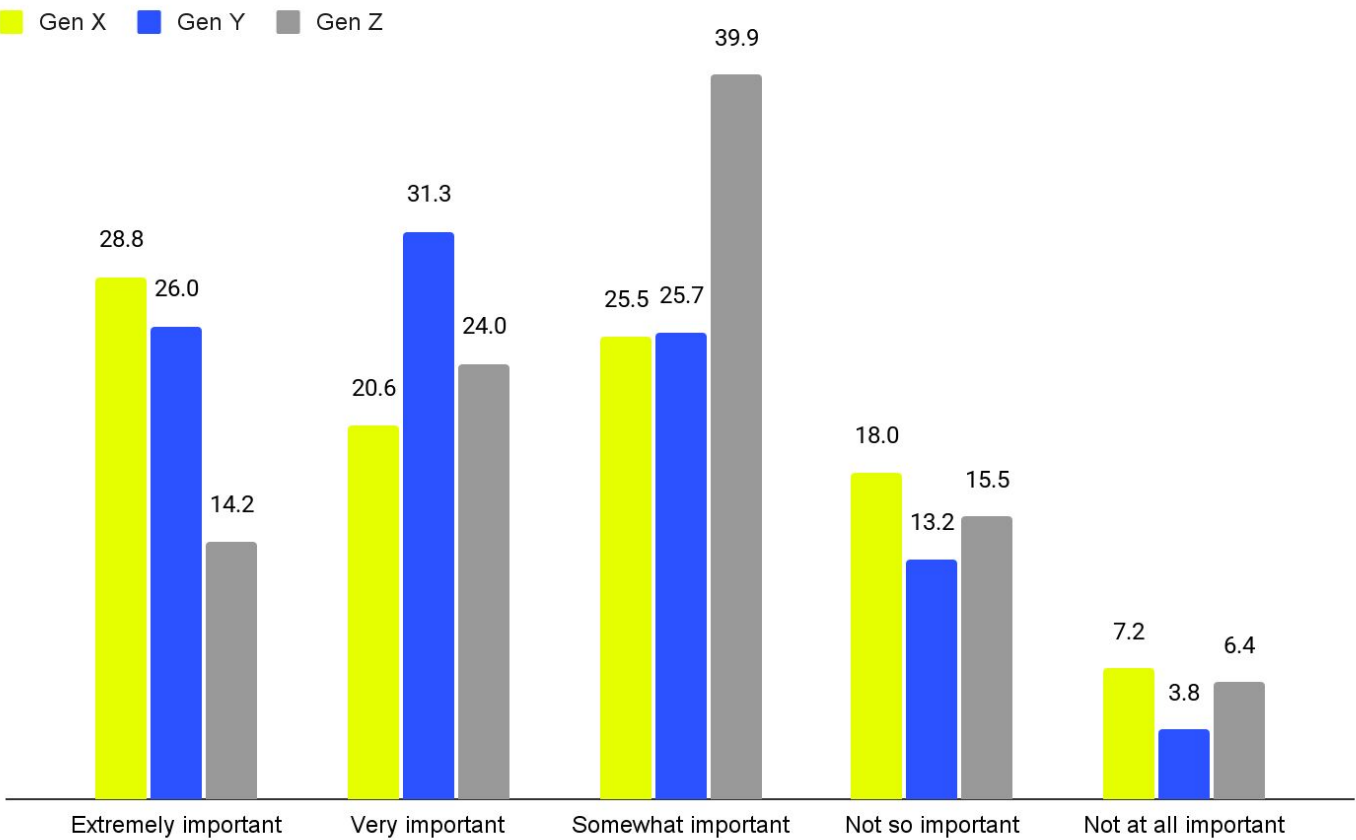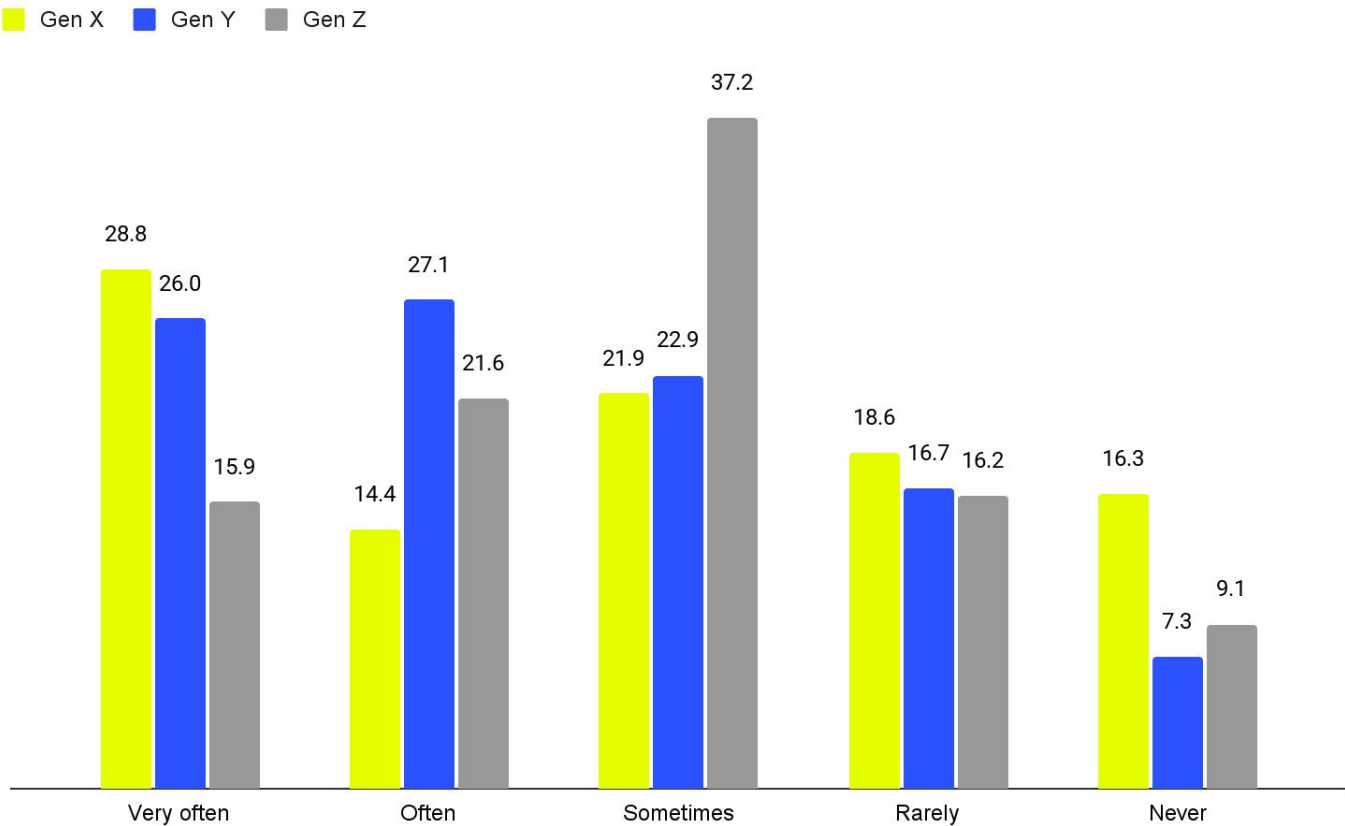
Question 18:

How often do you feel overwhelmed by the amount of sports content available to you?

Content fatigue is widespread, though its intensity differs by generation.

What it shows:

- Very or often overwhelmed: **Gen Y 53.1%, Gen X 43.1%, Gen Z 37.5%.**
- **"Sometimes" peaks among Gen Z (37.2%)**, showing moderate fatigue without frustration.
- Millennials consume across the most platforms and feel the highest strain from excess choice.
- Gen Z filters naturally through feeds, while Gen X experiences overload mainly from fragmentation across TV and streaming.
- Only about one in five fans across all groups rarely or never feel overwhelmed.

Sports fans need curation as much as access. Simplified, personalized highlight feeds and story formats can reduce noise, ease fatigue, and guide attention toward what matters most.

Legend: Gen X | Gen Y | Gen Z

|	Very often	Often	Sometimes	Rarely	Never
Gen X	28.8	14.4	21.9	18.6	16.3
Gen Y	26.0	27.1	22.9	16.7	7.3
Gen Z	15.9	21.6	37.2	16.2	9.1

Question 19:

In 2025, did you feel more connected to teams, individual athletes, or sports communities?

Fandom is shifting from team loyalty toward personalities and community-based connection.

What it shows:

- **Teams lead** for older cohorts: **Gen X 36.9%**, **Gen Y 34.7%**; **Gen Z 26.8%**.
- **Athletes lead** for Gen Z: **30.9%**, marking a generational flip where people surpass teams.
- **Communities matter more** for Gen Z (**19.3%**) than for Gen X (**10.8%**) or Gen Y (**11.8%**).
- **All equally:** Gen X **36.6%**, Gen Y **28.8%**, Gen Z **23.1%** (broader loyalty skews older).
- **New info:** Gen Z is **25% less likely** than Gen X/Y to feel **more connected to teams**, and **96.6% more likely** than Gen X (**+25% vs Gen Y**) to feel **more connected to players** than to teams or sports.

Fandom is becoming person- and community-led. Millennials still balance traditional and modern engagement, but Gen Z's identity is built around athletes, culture, and shared spaces. Sports brands should amplify athlete storytelling and fan-driven communities to stay at the center of this cultural shift.
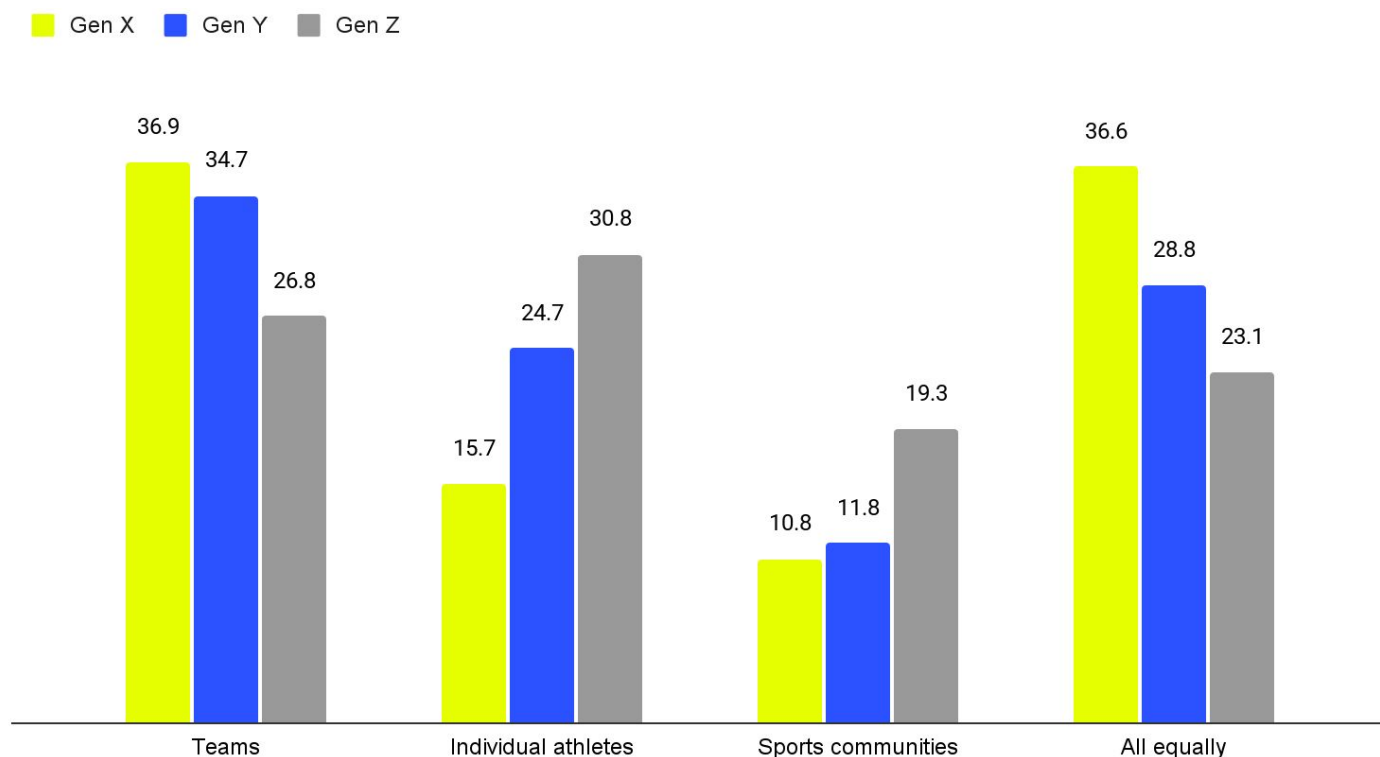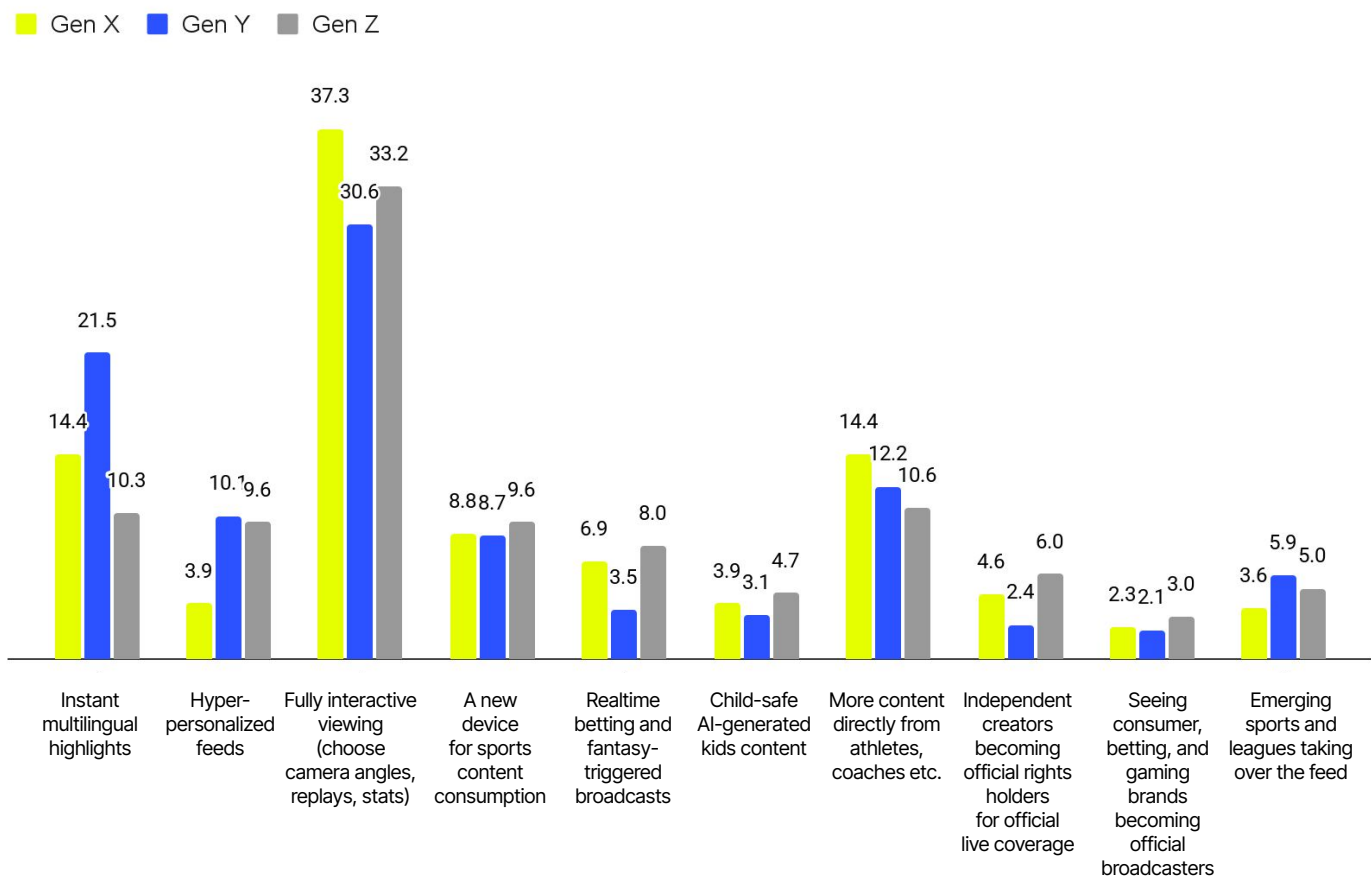
Question 20:

Which innovation would most excite you in the coming year?

Interactive viewing leads across every generation, with personalization and athlete-led content close behind.

What it shows:

- **Fully interactive viewing** (choose camera angles, replays, stats) is by far the top choice, averaging **33.7%** across generations (Gen X **37.25%**, Gen Z **33.22%**, Gen Y **30.6%**).
- **Instant multilingual highlights** rank high, especially with Millennials (**21.5%**) and Gen X (**14.38%**).
- **Hyper-personalized feeds** attract younger fans most, **Gen Y 10.1%**, **Gen Z 9.63%**, **Gen X 3.92%**, showing strong appetite for tailored experiences.
- **Athlete and coach content** draws steady interest across groups (**10–14%**).
- **Creator-led rights** see modest curiosity, led by Gen Z (**5.98%**) as part of participatory fan culture.

Fans want control, context, and personalization. Prioritize interactive viewing features, language-flexible highlights, and athlete-driven storytelling, with creator collaborations. This will help meet Gen Z's culture and discovery patterns.

<mark>Question 21:</mark>

By 2030, what do you think will be the biggest shift in how fans consume sports?

Fans expect the future to be mobile, personalized, and interactive—with Gen Z already living that reality.

What it shows:

- **Mobile-first viewing** dominates for **Gen Y (39.6%)** and **Gen X (32.35%)**, while **Gen Z (18.1%)** sees it as a given, no longer a trend, but a baseline.
- **Gen Z shifts focus** to **AI-driven personalization (18.7%)** and **short-form, on-demand highlights (18.7%)**, defining the next wave of fan experience.
- **Immersive tech grows with youth**, **VR/AR interest:** Gen Z **13.7%**, Gen Y **8.7%**, Gen X **9.8%**.
- **Personality and participation** trends continue to rise: **Gen Z 10.4%** prioritize athlete-led content, and **10.0%** highlight interactive viewing.
- **Across all fans, 60% cite mobile, personalization, and short-form** as the key forces shaping sports consumption through 2030.

By 2030, fans expect personalization, interactivity, and mobile flexibility to define sports consumption. What older fans see as innovation, Gen Z already treats as standard. This means the next frontier is emotional connection and algorithmic storytelling that feels uniquely personal.