

THE JOY REMATCH:

Fans Want Sports That Are Shorter, Shared, and Let Them In

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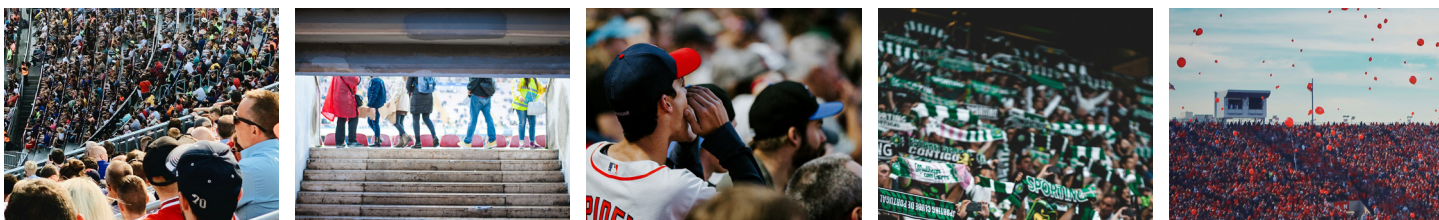
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Introduction

Today's sports world is being pulled in two directions at once, and both are winning. On one side, we see the rise of made-for-social, rule-bending formats like Banana Ball. The Savannah Bananas have gone from a quirky independent team to a touring phenomenon, selling out MLB stadiums, running a national lottery for tickets, and planning stops at massive venues like Texas A&M's Kyle Field with more than 100,000 seats—often on the strength of a two-hour cap, fan-caught foul balls as outs, and a show-first sensibility.

On the other side, incumbent sports have never been bigger. MLB has logged three straight years of attendance growth, topping 71 million fans and seeing TV ratings climb alongside younger engagement—helped in part by its own pace-of-play tweaks and shorter average game times. The NFL continues to dominate live TV; global properties like the FIFA World Cup are scaling to truly universal reach, with Qatar 2022 engaging an estimated 5 billion people and drawing over 1.4 billion viewers for the final alone. And at the same time, women's sports are surging, with properties like the WNBA posting double-and triple-digit viewership growth and expanding their fanbases at speed.

Sitting in between these poles are hybrid experiments like Gerard Piqué's Kings League. A seven-a-side, card-driven, streaming-native format built for Twitch, YouTube, and highlight culture. After rapid growth in Spain and the Americas, the Kings League is now targeting a U.S. launch as early as 2026, explicitly positioning itself as a faster, more flexible alternative that still feels like "real football."

This is not a fringe movement. It's a signal that format, cadence, and spectacle are now strategic levers, not afterthoughts.

In this context, every rights holder, league, and media partner is wrestling with the same set of questions:

01.

How far should we bend the game to fit modern attention?



02.

When does spectacle help, and when does it break trust?



03.

How much access and interactivity do fans really want?



Our research is designed to answer those questions with data, not anecdotes by quantifying the “joy gap” between the experience fans have and the experience they want, and by unpacking preferences around time, cadence, access, and identity across segments like Gen Z, parents, and non-fans.

For new sports formats, these findings function as a design spec: how long games should feel, how light or loud spectacle should run, how much agency and access to bake in from the start. For established leagues, it acts as a framing guide: how to package, schedule, price, and present the existing game so it delivers every bit of joy without rewriting the rulebook.

Executive Summary.

• The joy gap, clarified.



Viewers want more satisfaction from sports than they get today. On a 1–5 joy scale, they rate their current enjoyment at 3.29 and their desired enjoyment at 3.55—a quarter-point shortfall (-0.26) that means they’re already getting about 93% of the joy they want but still feel something is missing. That shortfall isn’t evenly spread as its biggest among non-fans (-0.44) and Gen Z (-0.36), the very audiences needed for future growth.



• Rhythm and integrity rule the product.

Fans care more about the shape and fairness of the game than raw volume of action. A balanced cadence is preferred (54%) over frequent scoring (36%) or a few high-stakes moments (11%). Competitive fairness tops “what matters most” (43%), while emotional storytelling is considerably more likely to be seen as least important (62%). The mandate is a game that feels real, paced, and fair—not overwrought.

• Access and micro-agency help, without crossing the line.

Appeal is high for instant rules (78%), tactics overlays (74%), ref/coach mic-ups (72%), and bodycams (67%). At the same time, guardrails are non-negotiable. 90% agree the game must stay fair even with added spectacle, and 84% say they’d bail if it feels scripted. This trend translates to live sporting events too as 29% say live polls that affect entertainment elements would make them more likely to tune in or stay longer in person. Micro-agency and visibility are welcome as long as the result stays real.

• Time is contextual and mobile is brief.



Stamina depends on when and where people watch. Willingness to watch sports for 2+ hours drops from 43% on weekends to 26% on weeknights. In person, 51% will commit to a longer game, but only 17% say they’d watch a 2-hour+ game on mobile. That’s a clear brief to design formats and products that flex by daypart and platform, instead of assuming one universal appetite for time.



• The perfect event is light, not loud.

Spectacle tone is important to fans. If they could create the perfect sporting event, light spectacle (think theme nights, player intros) outperforms both no spectacle and heavy spectacle. Fans also want unscripted energy rather than manufactured drama. The natural drama of the game, like comebacks and close finishes, beats out big stars and set-piece spectacles as the biggest driver of joy.





- **A playbook for new and established leagues.**

These preferences travel well. New or emerging properties can treat them as design constraints—codifying game length, cadence rules, spectacle tone, and access defaults. Established leagues, whose core rules are harder to move, can treat them as framing guidance—how they schedule games, package broadcasts, tune production, and price the outing so that the experience feels shorter, lighter, more transparent, and more social without rewriting the rulebook.



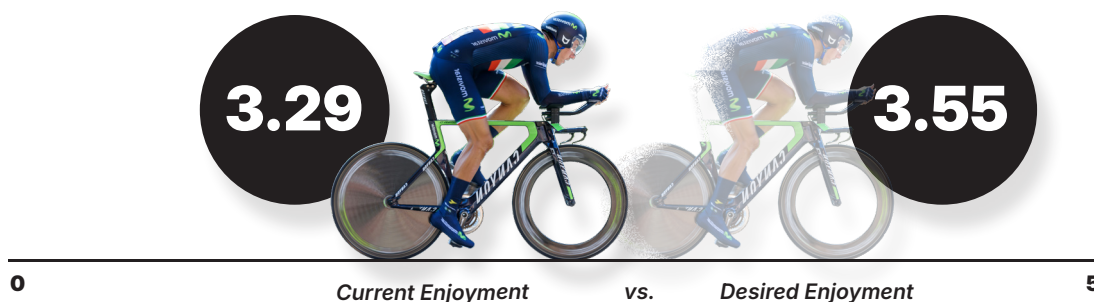
Detailed Findings:

Where the Extra Joy Lives

Sports don't need reinvention; they need reallocation.

Viewers are close to satisfied, but not quite there. They currently rate their enjoyment from watching sports at 3.29, but their desired enjoyment is 3.55 (-0.26). The shortfall concentrates in the audiences most needed to grow—non-fans (-0.44) and Gen Z (-0.36), signaling that the task is to improve the feel of the product before piling on more of it.

For new leagues and formats, that reallocation can be literal. Design shorter windows, clearer break structures, guardrails on spectacle, and access baked into the rules. For established leagues with less flexibility on rules and length, it's more about rebalancing the wrapper and choosing windows, bundles, feeds, and storylines that translate these preferences without touching the core game.



Time is contextual.

On a weeknight, a two-hour commitment shifts from asset to ask. Only a quarter (26%) will go 2+ hours on a weeknight, compared to 2 in 5 (43%) on weekends. Move the same content onto mobile and stamina shrinks further as just 17% are willing to watch a 2-hour+ game on a phone. When consumers are asked to build their ideal sporting event, a 90-minute promise is the sweet spot.

The implication is simple: treat "Done in ~90" as a design rule where you can, and as a packaging promise (e.g., condensed feeds, well-defined windows, etc.) where you can't.

Rhythm beats volume.

Fans choose balanced flow (54%) over pure scoring sprees (36%) or long slow builds (11%). Access features like instant rules (78%), tactics overlays (74%), mic-ups (72%), and bodycams (67%) test well, but they work only if the result stays real. 90% say the game must remain fair even as spectacle increases, and 84% say they're out if it feels scripted. When viewers are given the opportunity to construct their ideal event, the top lever is spectacle tone, with the "just right" amount of light spectacle beating both no and heavy spectacle. Doubling down on the desire for organic story lines, dramatic comebacks and close finishes are key to producing joy for fans, with comebacks being nearly 7 times more likely to bring joy than spectacle of any level.

The takeaway isn't "less fun"—it's "light, not loud." Rules and formats can nudge toward unscripted drama; production and marketing can strip out the bits that look like they are written in advance.

90%

say sport must remain fair even as spectacle increases



84%

say they're out if the sports event feels scripted

Access plus micro-agency raises stickiness without denting integrity.

Low-stakes choices, like fan participation, would make 43% of fans more likely to stay engaged longer and 37% more likely to watch another game. 46% are even willing to share viewing data if it unlocks personalization to the game they're watching. Viewers weigh light polls and micro-choices more heavily than fans deciding key moments. On the feed side, bodycam and live feeds edge standard broadcasts. The right posture is "unscripted transparency": show more, explain more, and invite light interaction but don't manufacture outcomes.

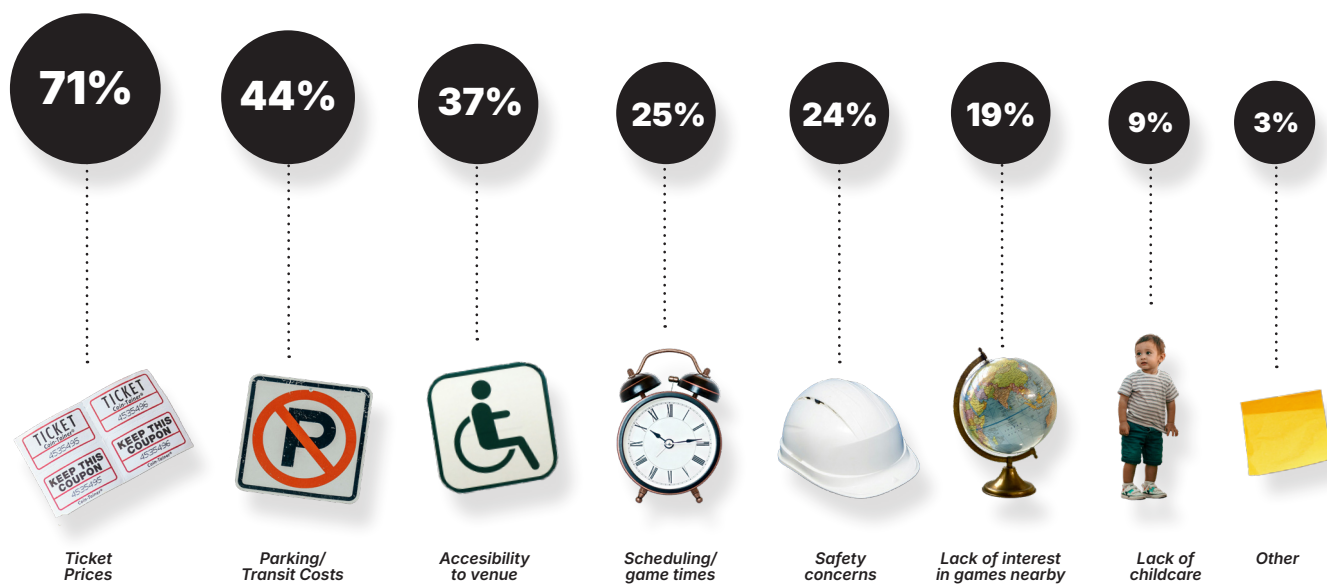
For new properties, that can mean defaulting to interactive, multi-angle viewing with guardrails around outcome control. For existing leagues, it can mean offering these as optional overlays and alternate feeds, preserving a traditional core broadcast alongside a more interactive experience.

The social fabric still matters.

Most fans prefer to watch “big moments” together with friends or family (57%), which should shape both product and pricing. However, the largest blockers to showing up live are ticket prices (71%), parking/transit costs (44%), and venue accessibility (37%).

Because the 4-ticket bundle comfort zone hovers around \$100–\$199 (27% willing to spend in this range, \$292 on average), the move isn't just a cheaper ticket; it's a clear, all-in offer that removes decision load and makes the outing the hero.

Barriers to attending more in-person sporting events



Formats should flex to audience identity.

Overall, viewers show a mild consensus for message framing focused on “heritage and heart” (58%) over the looser “fun and fearless” (42%), but Gen Z leans modern (63% “fun and fearless”) and even non-fans tilt that way (52%). Creator co-streams are additive. 32% say they'll choose a creator feed or toggle between that and standard broadcasts in regular season.

In a perfect world, at least according to fans, the winning bundle looks like this: ~90 minutes, light spectacle, bodycam + live explainers, and micro-choices at the edges. That's the design spec. For new leagues, it can be the starting point for the product itself. For existing leagues, it's a brief for shoulder programming, alternate feeds, and how the game is framed.

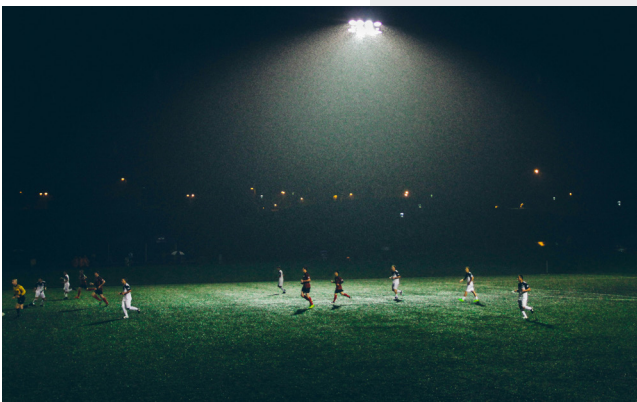
The Playbook: *Next Plays to Run*

These findings add up to a compact playbook that works at two levels. New or flexible properties can apply it directly to their rules, formats, & default features. Established leagues can apply the same plays through scheduling, packaging, production tone, and pricing, ultimately changing how the game is experienced rather than changing the game itself.



Time and format

Time-boxed weeknights ("Done in ~90"). Where you control the clock (new leagues, experimental formats), design weeknight products to finish in roughly 90 minutes, with a hard cap around 2 hours and clear, published end-times. Where you don't, build 90-minute "journeys" around the game: clipped feeds, defined windows of must-see action, and programming blocks you can credibly sell as "Done in ~90."



Tone and access

"Light, not loud" production. Lock spectacle tone to light and emphasize game drama. For new properties, that means rules that create natural high-leverage moments and discourage gimmicks. For existing leagues, it means stripping anything that reads scripted, focusing production on comebacks, close finishes, and authentic on-field emotion.



Unscripted access pack.

Frame instant rules, tactics overlays, mic-ups, and bodycams as explainers, not spectacles. For new formats, make these the default view. For existing leagues, offer them as an "access layer" or alternate feed so traditionalists keep their familiar view while others opt into more context and intimacy.



Agency and identity

Micro-agency, not outcome control. Add light polls and small, reversible choices that affect presentation (e.g., which angle to see next) rather than the outcome. Reserve “fans decide” experiments for youth-skewed or new properties that can tolerate more trial. For mainstream, legacy products, keep outcome control squarely with players and officials.



Dual feed by default.

Offer a traditional broadcast plus a creator co-stream with a one-tap toggle. For new leagues, build creator rails into the launch. For established leagues, pilot them in shoulder windows and regular season, with no-frills (standard feed, light/no spectacle) as the non-fan and purist on-ramp.



Message by identity.

In youth and creator-heavy channels, lead with “fun and fearless” messaging; in legacy channels, lean “heritage and heart.” Use athlete endorsements broadly, and creators where they have real audience overlap. This lets the same underlying product wear different faces without fragmenting the core.



Pricing and ritual

Price the ritual, not the ticket. Launch transparent 4-ticket bundles aimed at the \$100–\$199 range, where comfort is highest, with a mean willingness of \$292 as an upper bound. New properties can build this into their standard offer; existing leagues can create “all-in nights” that simplify the choice architecture without undercutting existing price tiers.

Segment Spotlights and Strategy



01. Gen Z

02. Parents of Gen Alpha

03. Non-Sports Fans

Gen Z

Big gap, short windows. Gen Z shows a bigger joy gap than average and shorter attention windows. They are social-native and expectation-heavy on entertainment and interactivity.



What to Give Them

- **Creator rails.** 37% would watch a creator-led co-stream in regular season; 70% say they're likely to watch their favorite creator's feed if that creator is co-streaming a sporting event; 62% are open to fan influence on micro-moments.
- **Speed & spectacle (without fakery).** Interest is high in timesaving rules (69%), power-plays/mystery cards (66%), and integrated choreography/music (62%), but paired with fairness guardrails as 83% agree fairness must remain intact.
- **Message fit.** "Fun & fearless" wins (63%) over "heritage & heart" (37%) as the tone of choice.

Activation Ideas

- **Creator-led simulcasts** with frictionless toggles, live polls, and clip-forward recaps.
- **Two-hour time caps and posted end-times** for weeknights; shot clocks and timeouts that naturally generate memeable moments.
- **AR layers for learn-by-doing moments** and reward loops tied to badges or points.

Takeaway

New leagues targeting Gen Z can bake these into the core product. Existing leagues can deploy them in alternative feeds, shoulder programming, and special-event nights without disrupting the main game.

Parents of Gen Alpha

High joy today, but value- and logistics-sensitive. Parents of Gen Alpha already report high current joy and a small gap. Their motivations are family-forward, and they're highly responsive to fairness, safety, and value.



What to Give Them

- **Family value packs.** On average, their acceptable 4-ticket bundle pricing is \$340, and transparent bundles strongly resonate as 85% say that would make them attend in-person sports events more often.
- **Predictability & pace.** Majorities are interested in two-hour time caps (72%) and timesaving rules to speed up play (74%); they're also comfortable enforcing strict time limits (73%).
- **Safety & logistics.** Key barriers to in-person sporting events like scheduling/game times (35%), safety concerns (27%), and lack of childcare (24%) can be addressed with earlier starts and dedicated family seating areas.

Activation Ideas

- **All-in bundles** at \$199–\$349, including transit credits and kids' merchandise.
- **Mic-up moments and bodycams** that pull kids in, plus "learn the rules" overlays for parents and children to make it a bonding moment.

Takeaway

New family-focused properties can define themselves around this bundle-plus-pace equation from day one. Existing leagues can create dedicated "family nights" and kid-forward feeds that apply the same logic without changing the base schedule.

Non-Sports Fans

60% say sports don't play a role in their life, their joy gap is the largest, and 57% say there isn't anything that would turn a live game into a can't-miss event. But, when they do lean in, it's for clarity, simplicity, value, & fairness.



What to Give Them

- **Clarity tech still helps.** 2 in 5 or more find instant rules (55%), player bodycams (46%), real-time tactic/stats overlays (44%) and mic-ups (43%) appealing.
- **Time & price.** 2+ hours is a hard sell — only 14% would give this time on a weekend. Their family bundle mean is \$135, with 48% in the \$1–\$99 range and 24% in \$100–\$199.
- **Message fit.** Even here, “fun & fearless” (52%) slightly edges “heritage & heart” (48%).

Activation Ideas

- **“Try-a-Game” nights** that are 90–120 minutes max, ~\$99 all-in, first-timer lanes, and live rule explainers.
- **Social-adjacent events** to make the outing the hero (post-game concert, theme nights, good food & beverages), not the sport itself.
- **Fairness-first branding** that emphasizes “real stakes” because three-quarters or more still care about fairness and are anti-script.

Takeaway

New properties trying to attract non-fans can be built around short, clarity-first, social-adjacent experiences from the start. Existing leagues can treat non-fan nights as “on-ramps”—stripped-down, well-explained events that borrow from live entertainment playbooks without pretending everyone will become a die-hard.



About this research

This survey was conducted online within the United States by The Harris Poll from October 1-10, 2025, among 2,026 people ages 16 and older. The sampling precision of Harris online polls is measured by using a Bayesian credible interval. For this study, the sample data is accurate to within ± 2.1 percentage points using a 95% confidence level.

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