



WHAT'S THE SCORE?

The evolution of sports fans and sports media

WAVE 5

**MAR
2026**



ENTERTAINMENT
RESEARCH

EXCERPT OF FINDINGS



Being a sports fan is complicated:

Streaming has made it more complicated for fans to follow the leagues and sports they want – and their frustration is starting to show

hub INTEL | DEEP DIVE

NOV 2025

FIELD OF STREAMS:

Why sports fans are getting lost in the cornfield of streaming.

A group of seven baseball players in white uniforms with a dollar sign on the front are walking away from the camera in a cornfield. Instead of heads, they have television monitors displaying various streaming service logos: YouTube, Netflix, Amazon Prime Video, fubo, ESPN, Paramount+, and FOX Sports. The background shows a vast cornfield under a dramatic, sunset-colored sky.



Exclusive rights are a differentiator

In a world where sports are becoming more fragmented and harder to find, services that let you watch *all* of a particular sport in one place can be more valuable

UFC
ON
Paramount+



Social continues to both compete and create opportunity:

Especially among young fans, social is taking over as the home of non-live sports content. But creator communities are also new opportunities to connect with fans that never existed before



Cleetus McFarland

18h · 🌐

I have a lot to tell you. Last week I secretly went to the Daytona Speedway @nascar test and got approved to race in the upcoming @arca_racing ARCA 200 on February 15th (day before the Daytona 500). I'll be driving the @rettejones30 Gen 5 ARCA Mustang sponsored by my good friends at @bekenetik, a Ketone powered energy drink company I recently bought 3% of. I just posted a video of me ripping this bad unit around Daytona with my mullet flowing in the wind, and a sweet tour of ... [See more](#)



👍❤️ 17K

969 🗨️ 476 📌

Long-form content is driving connection with sports

Leagues and services are investing in documentary and scripted content to engage with fans year-round, and to attract new fans who aren't familiar enough to watch for the sport alone

FROM THE DIRECTOR OF TOP GUN: MAVERICK



THE MOVIE





WE SURVEYED 3,773 US SPORTS FANS

- Age 13-74
- Have broadband access
- Data collected 12/23/25 to 1/22/26
- **Respondents were screened for sports interest before completing the survey...**

Not a sports fan at all



Casual Fan

Avid Fan



Respondents who chose "zero" were terminated from the survey

- In this report we are tracking our results against Wave 3, which completed fielding in early Jan'25 and had a sample of 3,753 respondents





1

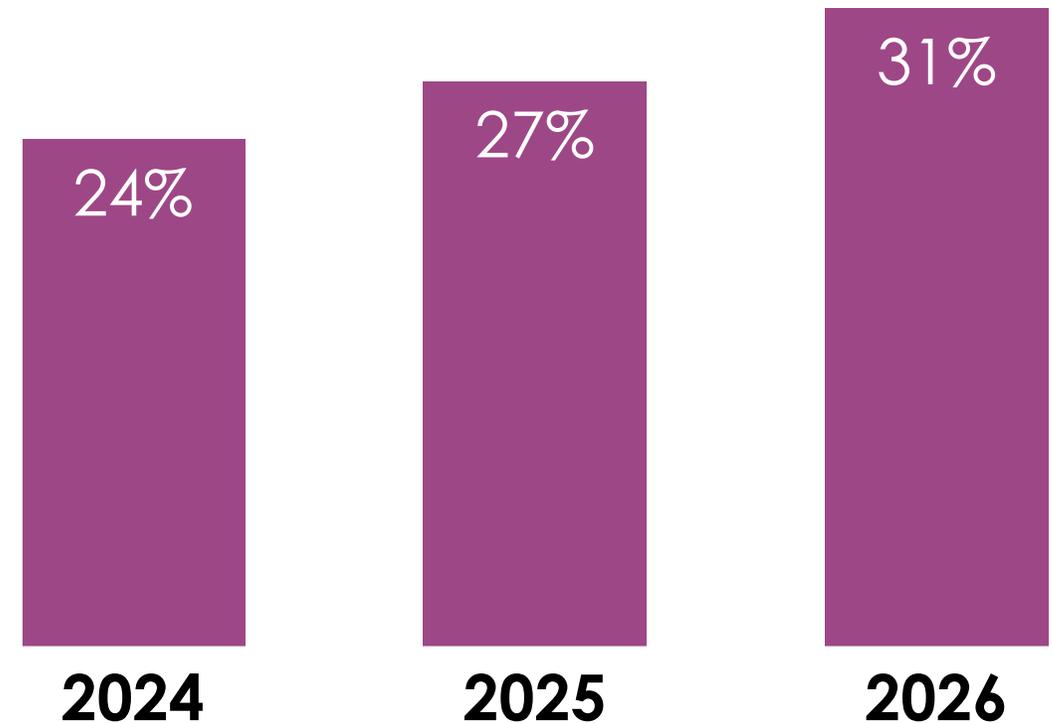
KEY FINDINGS

MORE SPORTS FANS FIND THEMSELVES ABLE TO GET BY WITHOUT PAY TV



% of sports fans who are “cord cutters”:
- “Cord cutters” = no traditional cable, satellite or telco TV bundle -

Almost a third of sports fans said they only watch TV on streaming platforms (up from about a quarter in 2024)

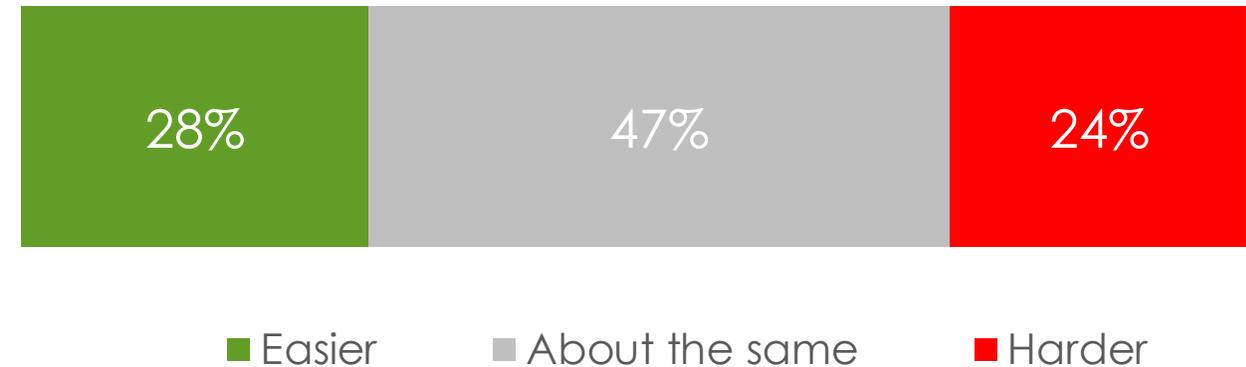


FANS ARE SPLIT ON WHETHER STREAMING MAKES SPORTS CONTENT EASIER TO FIND, OR HARDER



Half of sports fans haven't noticed a big difference in the effort required to follow sports. The rest are split as to whether watching sports has gotten easier or harder

Compared to a year ago, is it easier or harder to find and watch sports?

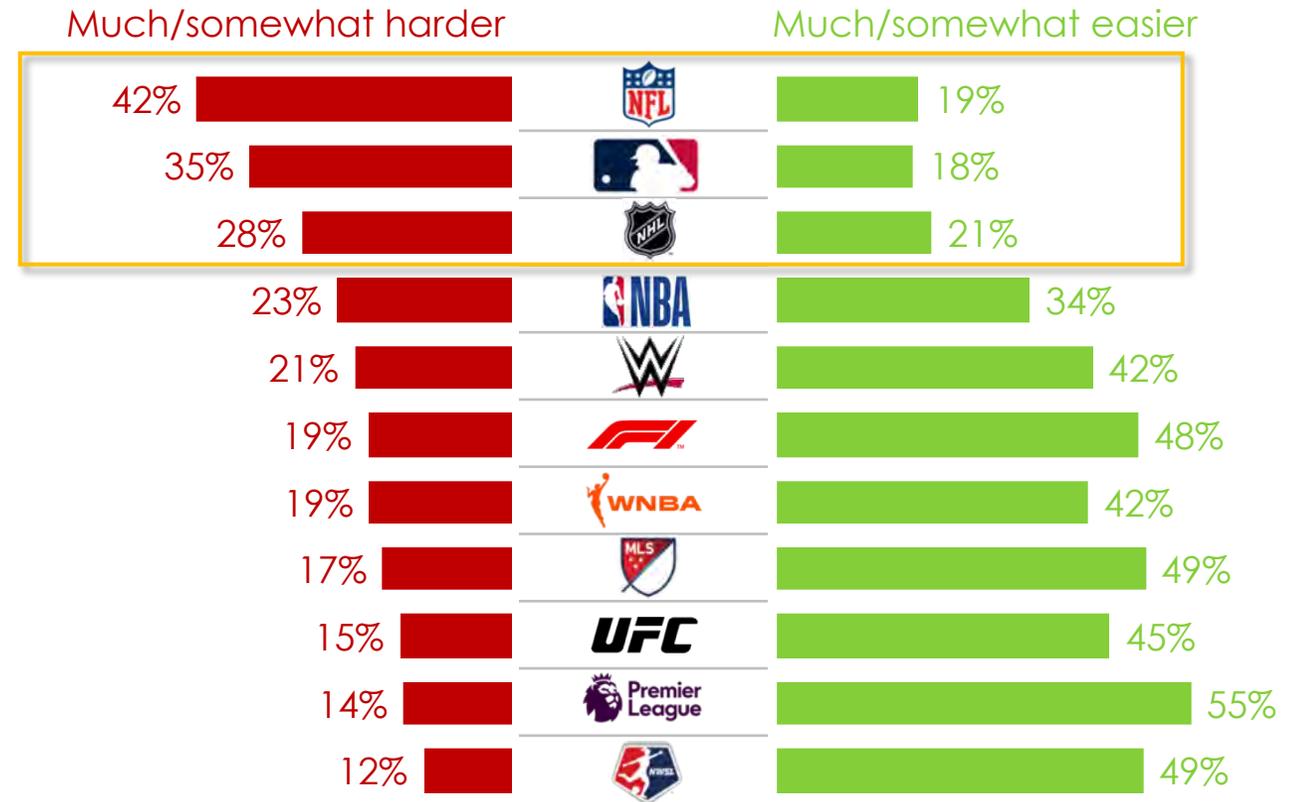


MAJOR ESTABLISHED SPORTS ARE WHERE FANS ARE FINDING MORE FRICTION



Sports, which have diversified from cable to streaming (like the NFL or MLB), are becoming harder to find. But for fans of second tier or sports based outside the US, the viewing experience is getting easier

Has it become easier or harder to find content about that sport?
 - Among avid fans of each specific sport -

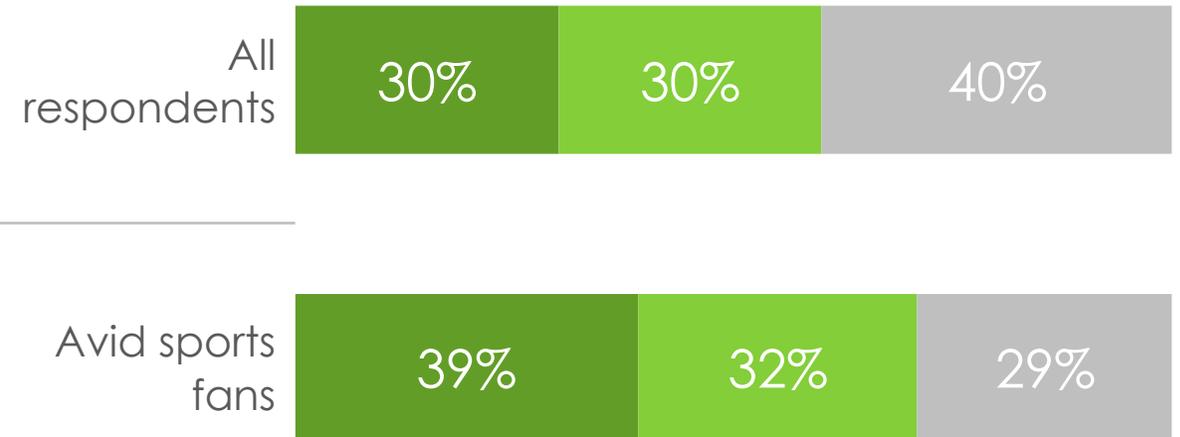


FRAGMENTATION MAKES EXCLUSIVE RIGHTS MORE APPEALING



Almost a third of fans, and 39% of avid fans, say they're more likely to sign up for a platform that enables them to watch *all* of a sport they follow in one place

Are you more likely to sign up for a streaming service that has exclusive/complete rights to a sport you follow?



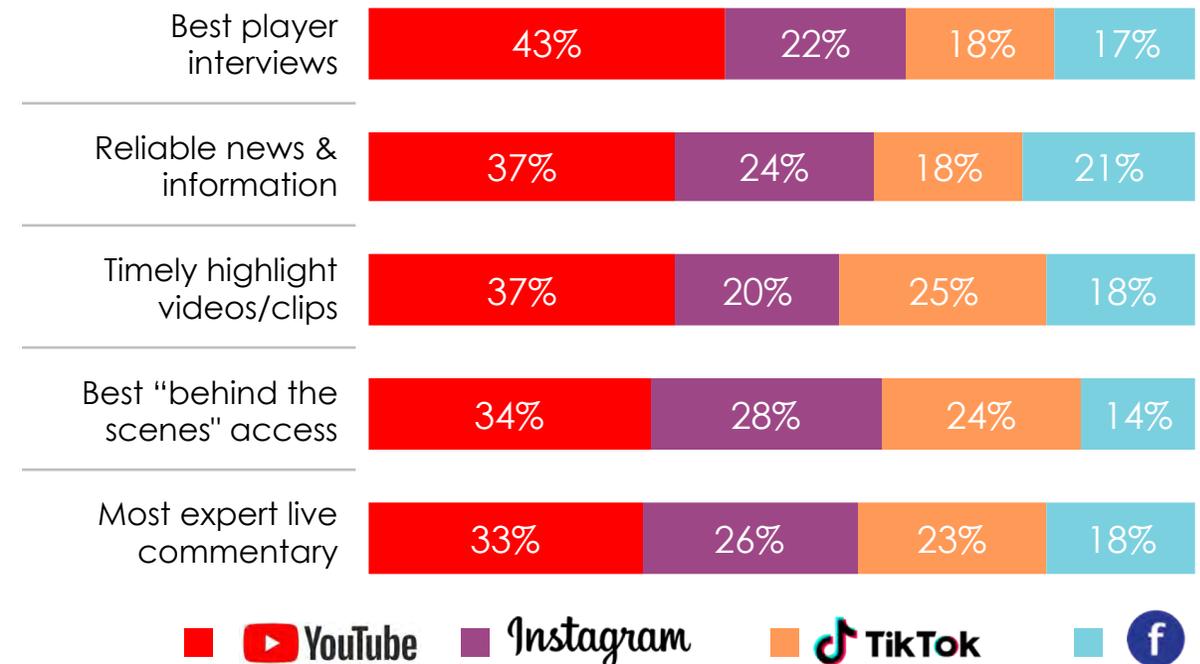
- I'm much more likely to sign up
- I'm somewhat more likely to sign up
- It doesn't make a difference

MANY FANS SAY YOUTUBE IS THE “BEST” SOCIAL PLATFORM FOR FOR SPORTS, NEWS AND HIGHLIGHTS



But it's not completely dominant: among fans who use all four of these major platforms, ~60% chose one of the other three for each use case we asked about

Which platform does this attribute describe best?
- Among people who use *all 4* for non-live sports content -

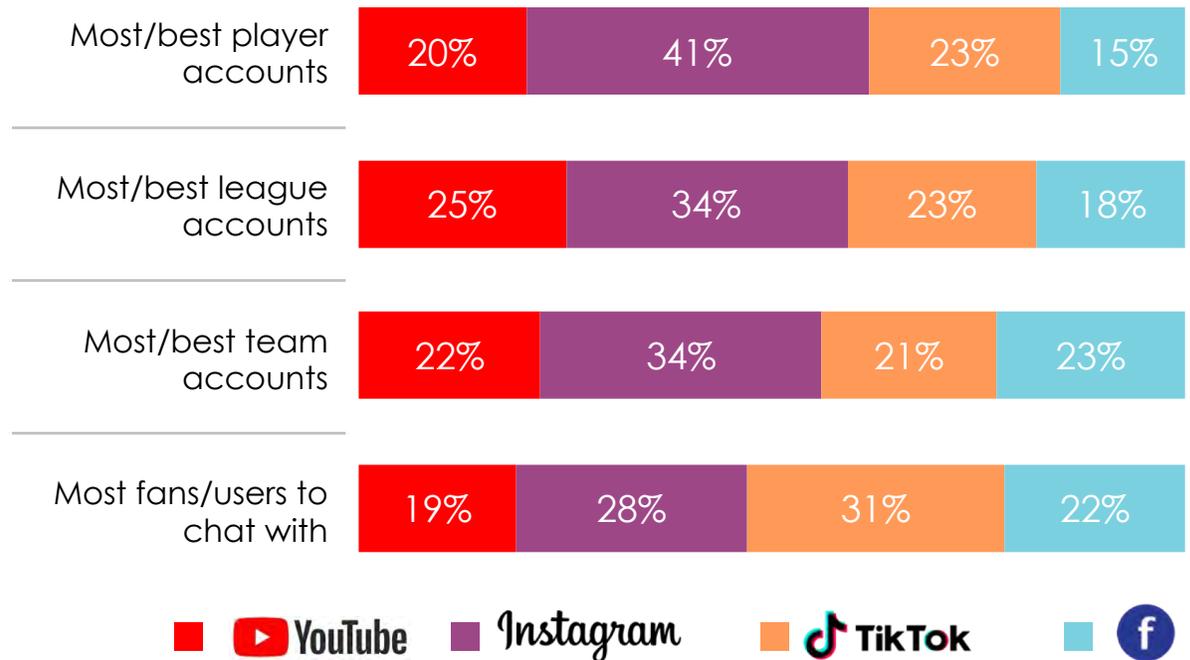


INSTAGRAM IS BEST TO CONNECT WITH PLAYERS, TEAMS AND LEAGUES. WHILE TIKTOK IS BEST FOR CONNECTING WITH FANS



Fans who use YouTube, Instagram, TikTok and Facebook for sports are most likely to look to Instagram for the best access to players and teams, and TikTok for chats, but again, the majority choose one of the other platforms

Which platform does this attribute describe best?
- Among people who use *all 4* for non-live sports content -

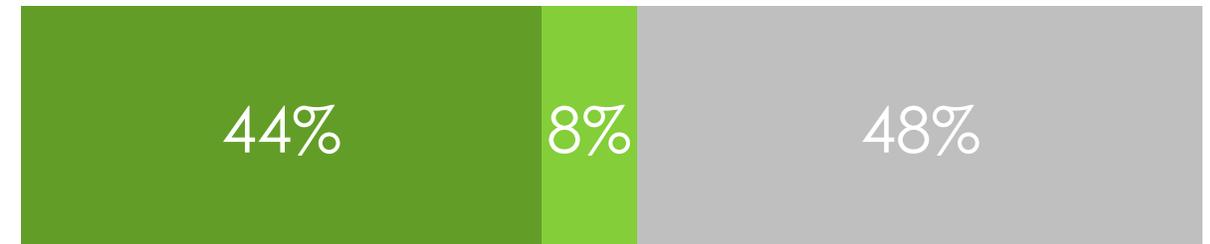


DOCUMENTARIES ARE HIGHLY EFFECTIVE AT ATTRACTING NEW FANS TO A SPORT



Half of sports fans told us they had become a fan of a sport after watching a documentary about it – and most said they remain a fan today

Have you become a fan of a sport after watching a documentary on that sport?
- Watch documentaries at least occasionally -



- Yes – and I am still a fan
- Yes – but only a fan for a while
- No



BETTING DRIVES DEEPER ENGAGEMENT WITH SPORTS

Three quarters of fans who bet at least occasionally say that betting makes them follow sports more closely (and a third say “much more closely”)

“Betting makes me follow sports...”
- Among those who bet at least occasionally -



- Much more closely than if I didn't bet
- A little more closely
- No more closely



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CONCLUSIONS

A person in a blue shirt is seen from the back, holding a football. In the background, a television screen displays a sports game. The scene is brightly lit, suggesting an indoor setting like a living room or a sports bar.

#1

Sports fans continue to slowly shift towards streaming platforms, but the live TV bundle remains an essential source for sports

#2

Many fans say sports are harder to find – and frustration is mounting

#3

Making sports simpler – e.g. through aggregation features or exclusive rights – is a way to attract fans to a service

#4

Sports documentaries are an effective way to drive discovery and fandom, especially of second-tier sports

#5

Sports betting puts skin in the game: fans who bet follow sports more closely

hubINTEL



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QUESTIONS?

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