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Inside Live Sports

Linear, CTV, digital and the complexity
of today's landscape for live sports fans

What We Know

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**MANY
PEOPLE
WATCH LIVE
SPORTS**

57%

**CTV HAS
SURPASSED
LINEAR***

105.3
mm

85.7
mm

CTV

Linear

**DIGITAL-FIRST
PLAYERS HAVE
TAKEN THE
FIELD**



**LIVE SPORTS
DEMAND VIA
PROGRAMMATIC
HAS SURGED****

+751%

+489%

+180%

YoY Ad
Requests

YoY
Bids

YoY
Imps

*Altman Solon Sports Survey, 2022

**Nexxen Internal SSP Data: FY2023 vs. FY2024

How are live
sports fans'
viewing
preferences
changing ...

and how is
today's
media
landscape
affecting
them?



Methodology

SURVEY

UK gen pop

Adults 18+

**Must be regular
viewers of live sports**

(≥ once per month)

n= 1,062

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NEXXEN DISCOVERY

Nexxen's patented audience tool that analyzes and correlates more than 3.4B daily content engagements across web, video, mobile, TV, and social to track consumer behaviors, consumption trends, and sentiment.

Audience segments informed by survey data were also built to extract insights from identified fandom groups: Superfans, Dedicated Fans and Casual Fans.



NEXXEN STUDIO

Using nationally representative Nexxen Studio Creative Insights data from thousands of video ad tests (2021-present), targeted weighting was applied to reflect the demographics and interests of fandom groups (Superfans, Dedicated Fans, Casual Fans).

This approach accurately models audience-specific responses, enabling comparisons to the General Population to identify key differences in ad performance.

Key Takeaways

80%

**watch live
sports via CTV**

Digital platforms securing league rights and legacy providers embracing CTV have led most fans to stream sports.

Football

**is what drives fans'
CTV subscriptions**

Football drives fans to expand their platform usage to CTV subscriptions, making it a must-have for their viewing lineup.

44%

**struggle to find
their games**

With so many overlapping platform rights, fans are increasingly frustrated and confused about where to watch.

Superfans

**show the highest lift
in purchase intent**

Live sports fans are more responsive to relevant ads than the general population, with Superfans driving the highest lower-funnel lift.



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Today's Live Sports Fan



True Fanatics

Live sports fans watch constantly, turning games into shared experiences—with football leading the way.

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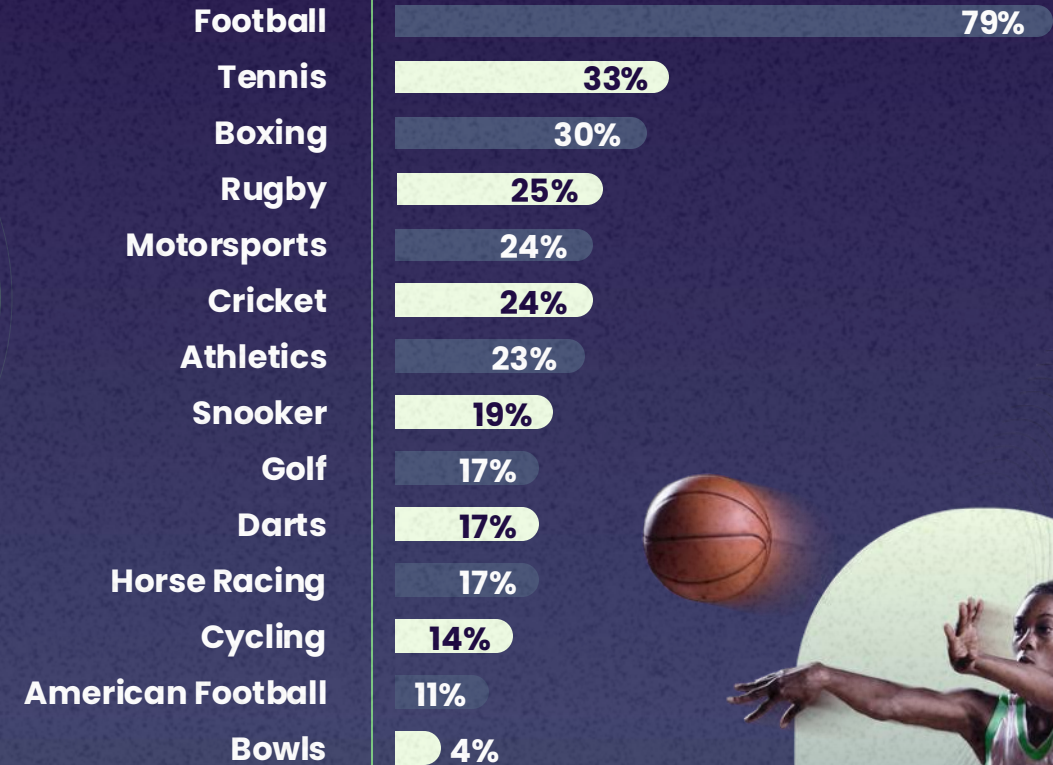
90% co-watch with family/friends

77% watch live sports weekly or more

47% with kids

36% with adults only

Most-Watched Live Sports



Women's sports are on the rise, with 41% of all live sports fans currently following female leagues

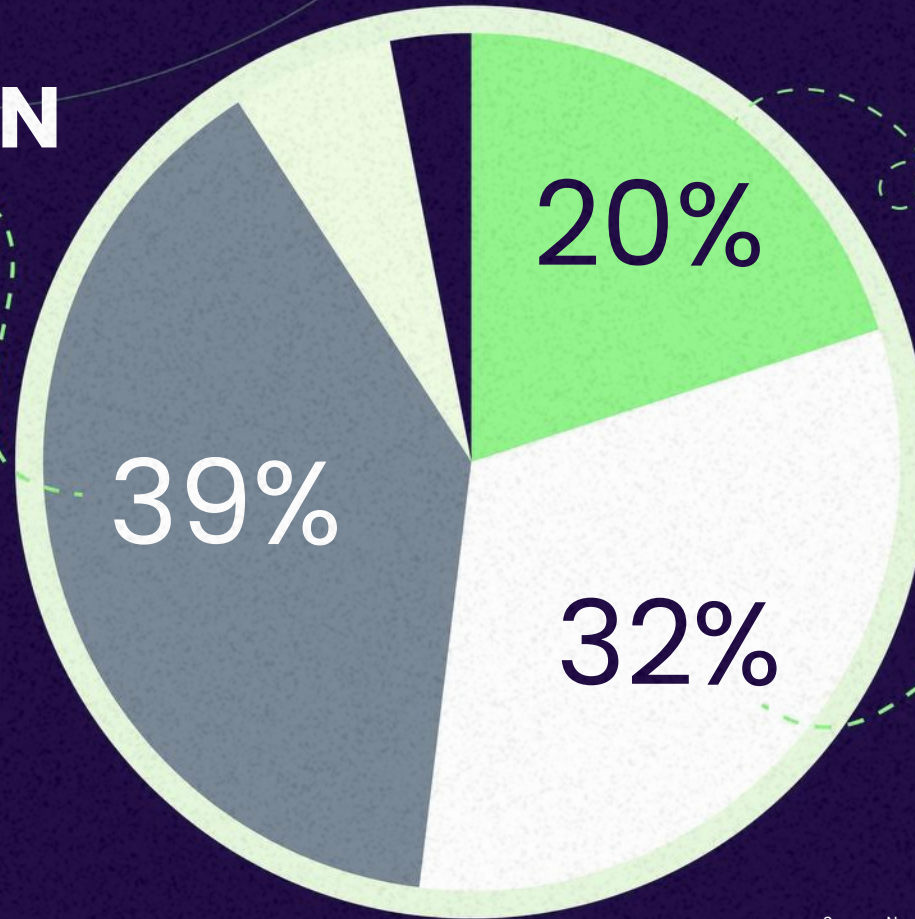
Source: Nexxen. Inside Live Sports: Streaming, Linear, CTV, digital and the complexity of today's landscape for live sports fans. Fielded December 2024. UK data. Among A18+ who are regular live sports viewers. N = 1,062.

Meet the Fans

Most live sports fans primarily identify with one of three main groups of fandoms.

DEDICATED FAN

"I regularly watch my favorite teams or leagues, but I'm okay with missing a few games."



SUPERFAN

"I almost never miss my favorite team's match/game and often plan my schedule around their games."

CASUAL FAN

"I enjoy live sports occasionally, like tuning in for big games or events."

Beyond The Game

Nexxen Discovery reveals that fans engage with digital content far beyond the game, with distinct interests that influence their online behaviour and preferences.

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DEDICATED FAN

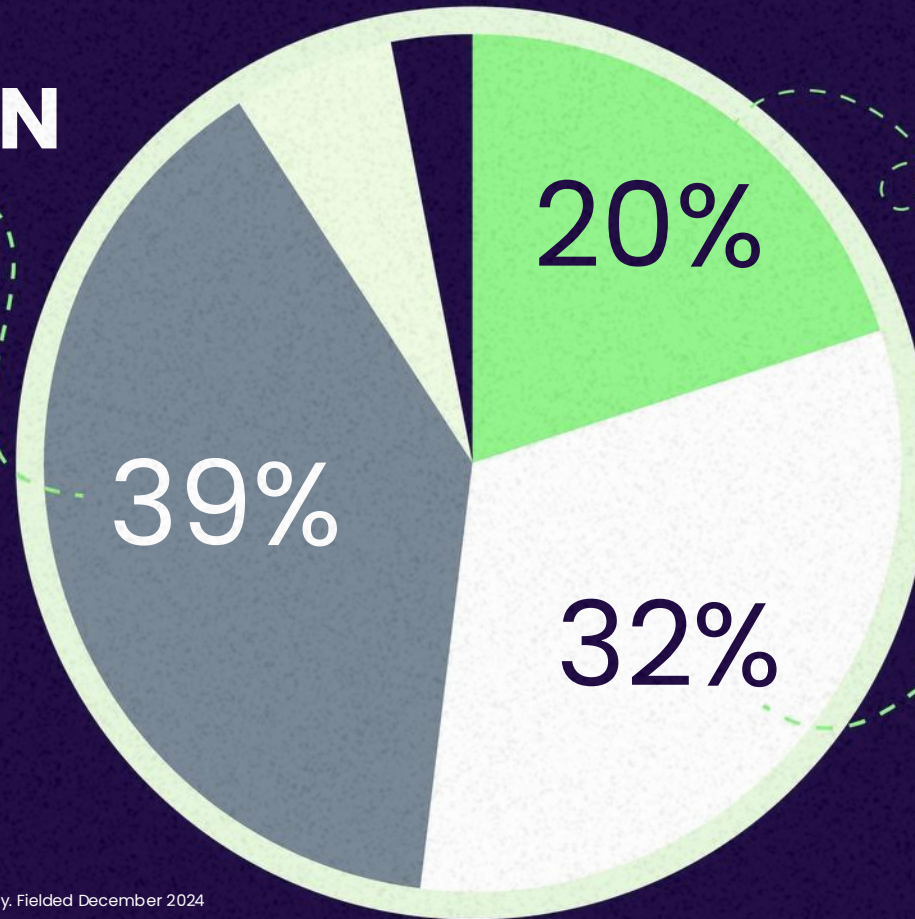


Travel



Live Music

Most likely to engage with:
Travel news content, especially
staycations



SUPERFAN



Fitness



Electronics

Most likely to
engage with:
EA Sports content

CASUAL FAN



Spas &
Self-Care



Dining

Most likely to
engage with:
Skincare content,
and will pay for
quality

What does a Superfan Audience do online?

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We used our insights platform, Nexxen Discovery, to dig deeper into the behaviours of our Superfan Audience.



Sports

15x

more likely to visit goal.com and espn.co.uk for sports news, and fantasyfootballscout.co.uk for fantasy team information



Fitness

27%

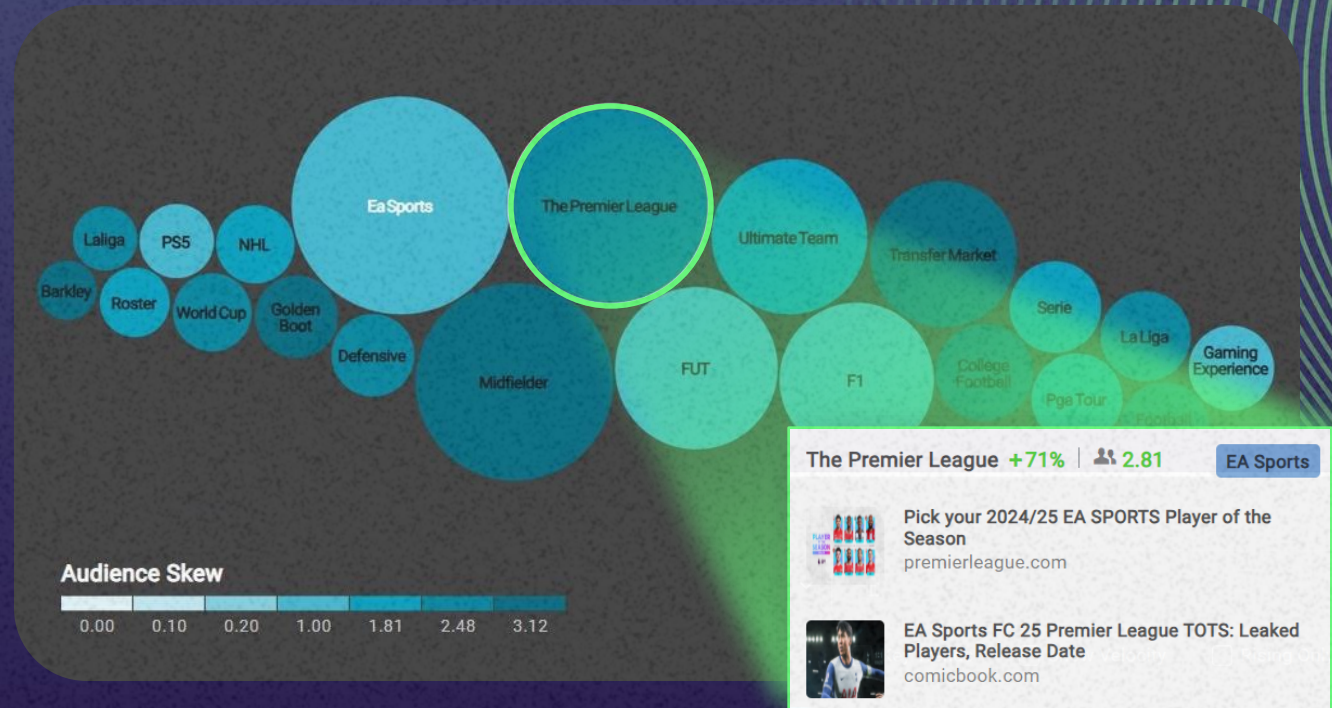
of the creative engaged audience **visits fitness websites** like myprotein.com and menshealth.com, prioritising their fitness and nutrition through protein recipes and supplements



Consumer Electronics

3.5x

more likely to **engage with consumer electronic content** for Apple music, Beats by Dre over ear headphones and quality sounding speakers



Superfans are **+2.8x** more likely to engage with **EA Sports content**, specifically for FC 25 Premier League games. These consumers are playing sports games just as much as they're watching sports.

What does a Dedicated Fan Audience do online?

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We used our insights platform, Nexxen Discovery, to dig deeper into the behaviours of our Dedicated Fan Audience.



Sports

5x

more likely to be interested in the ecb.co.uk and espn.cricinfo.com for their cricket passions



Travel

20%

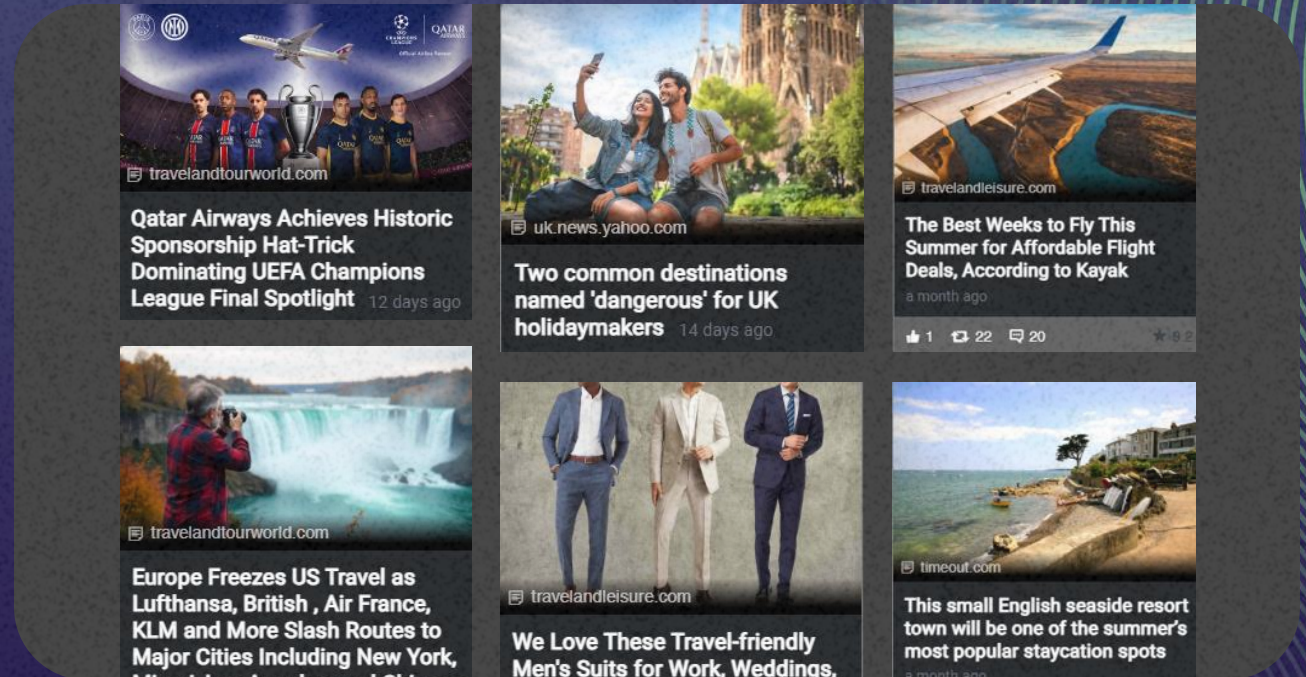
of the audience **visits travel websites** like visitlondon.com, premierinn.com and southwesternrailway.com, prioritising local travel this summer



Live Music

4x

more likely to **engage with live entertainment content** for music, especially festivals like BST Hyde Park and SXSW London



The Dedicated Fan is **+2x** more likely to engage with **travel news content**, specifically for travel freezes, unsafe locations, travel updates, and staying local this summer at a low cost. These consumers prioritise traveling but **are cost conscious** and choose staycations.

What does a Casual Fan Audience do online?

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We used our insights platform, Nexxen Discovery, to dig deeper into the behaviours of our Casual Fan Audience.



Sports

4.5x

more likely to visit wtatennis.com and cyclingweekly.com, as **tennis and cycling are most top of mind**



Spas & Self-Care

3x

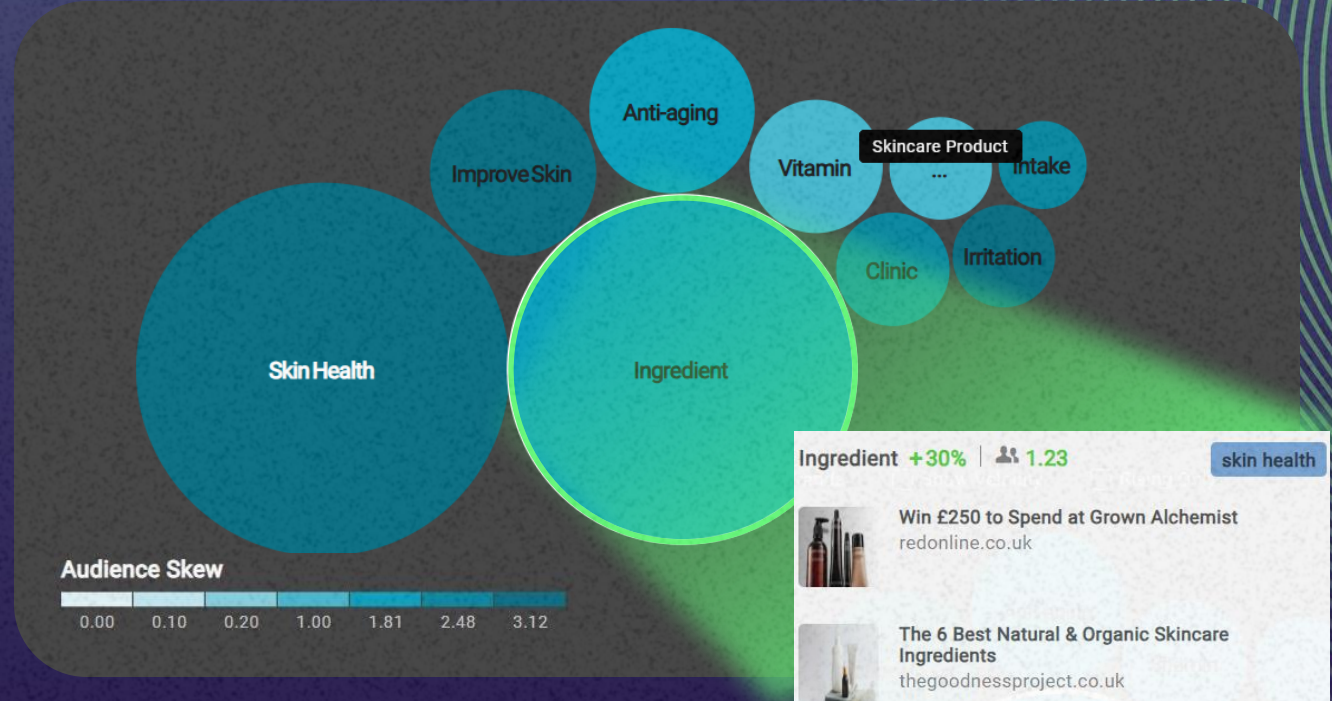
more likely to **visit spa and self-care websites** fresha.com and 2x more interested in content around moisturizing, SPF, and balm



Dining

5x

more likely than the general public to visit hot-dinners.com and opentable.co.uk, prioritising dining out



Your Casual Fan Audience is **+1.5x** more likely to engage with **skincare content**, specifically for skin tech products, anti-aging and natural and organic ingredients. They care about what goes on their skin and will pay for quality.

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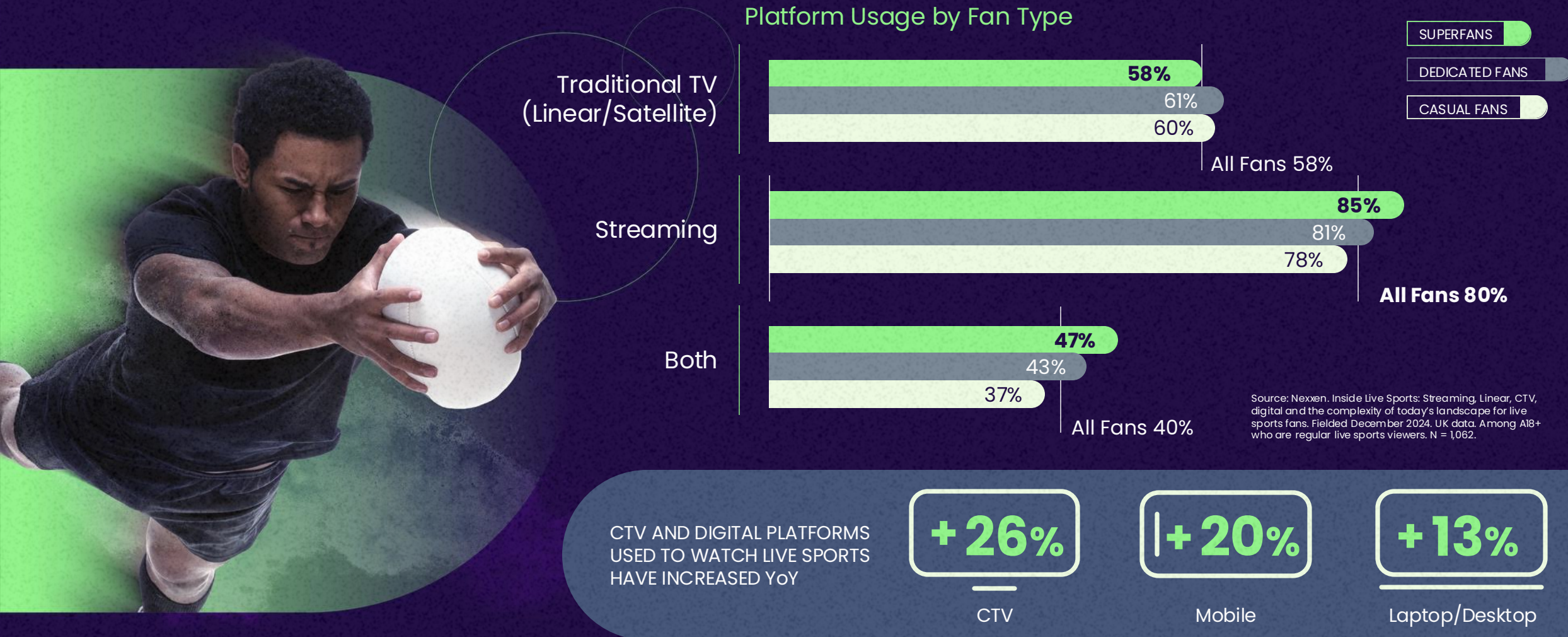


How Fans Watch

The Streaming Landscape

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CTV viewership continues to rise, but there's still considerable overlap with linear TV for Superfans. Meanwhile, live sports fans are streaming live sports more than ever, with year-over-year growth across all platforms.



Loyalty to Linear

For Superfans across generations, traditional TV remains a top choice for its reliable content delivery and easy access to live sports content.

47% of Superfans lead the way in mixing linear + CTV

39% of Gen X remain loyal to linear (in addition to adding CTV)

40% of adult Gen Z watch linear

Why Linear is Kept

Reliable content delivery

67%

Guaranteed access to tentpole events

55%

Access to dedicated sports channels

49%

Access to local and regional sports

45%

Less geo restrictions

10%

Source: Nexxen. Inside Live Sports: Streaming, Linear, CTV, digital and the complexity of today's landscape for live sports fans. Fielded December 2024. UK data. Among A18+ who are regular live sports viewers. N = 1,062.

What's Driving CTV Uptake?

Fans eagerly add CTV subscriptions to their lineup, driven overwhelmingly by their passion for football.

77%

of fans subscribe to stream one of the nation's favorite pastimes: football or cricket

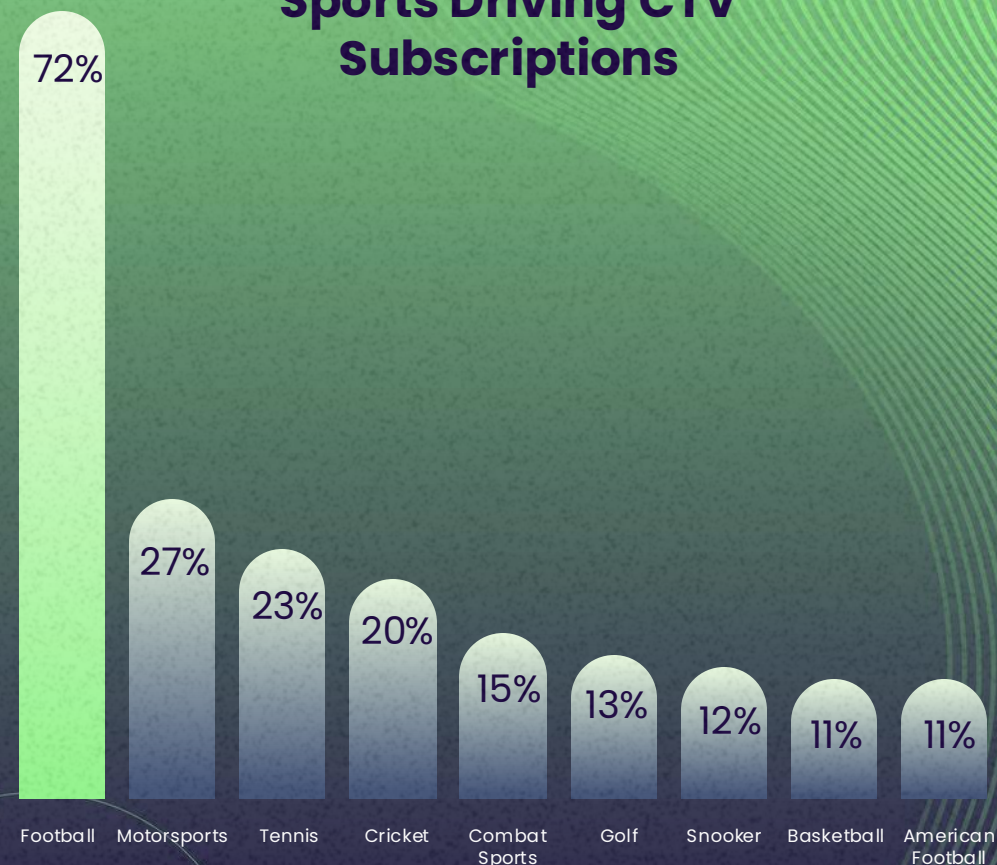
>50%

of Gen Z and Millennials use CTV, making them the most dominant users

3avg

subscriptions are used to watch live sports

Sports Driving CTV Subscriptions



Source: Nexxən. Inside Live Sports: Streaming, Linear, CTV, digital and the complexity of today's landscape for live sports fans. Fielded December 2024. UK data. Among A18+ who are regular live sports viewers. N = 1,062.

Dual Screen Action: Mobile Multitasking

At any given moment during a live sporting event, fans are multitasking on a second device.

76%

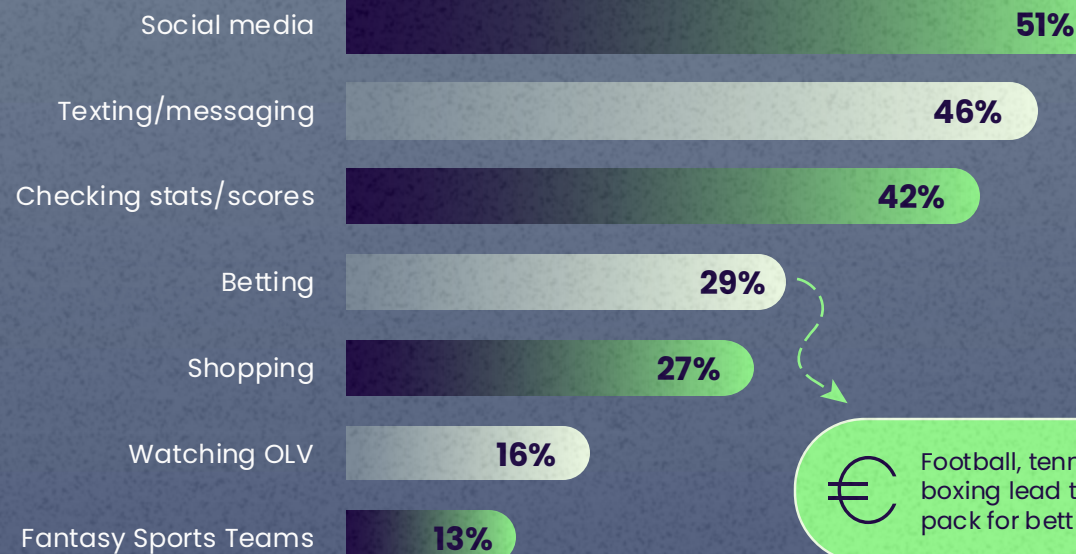
of fans use a second device while watching

87% SUPERFAN

76% DEDICATED

68% CASUAL

How They Multitask



Source: Nexxen. Inside Live Sports: Streaming, Linear, CTV, digital and the complexity of today's landscape for live sports fans. Fielded December 2024. UK data. Among A18+ who are regular live sports viewers. N = 1,062.

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Response to Media Fragmentation



A Crowded Field is Creating Frustration

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44%

struggle to find where
games are airing

51%

have missed
games because
they didn't know
where to watch

67%

feel frustrated
when searching for
live sports content

39%

want clearer
schedules from
providers to watch

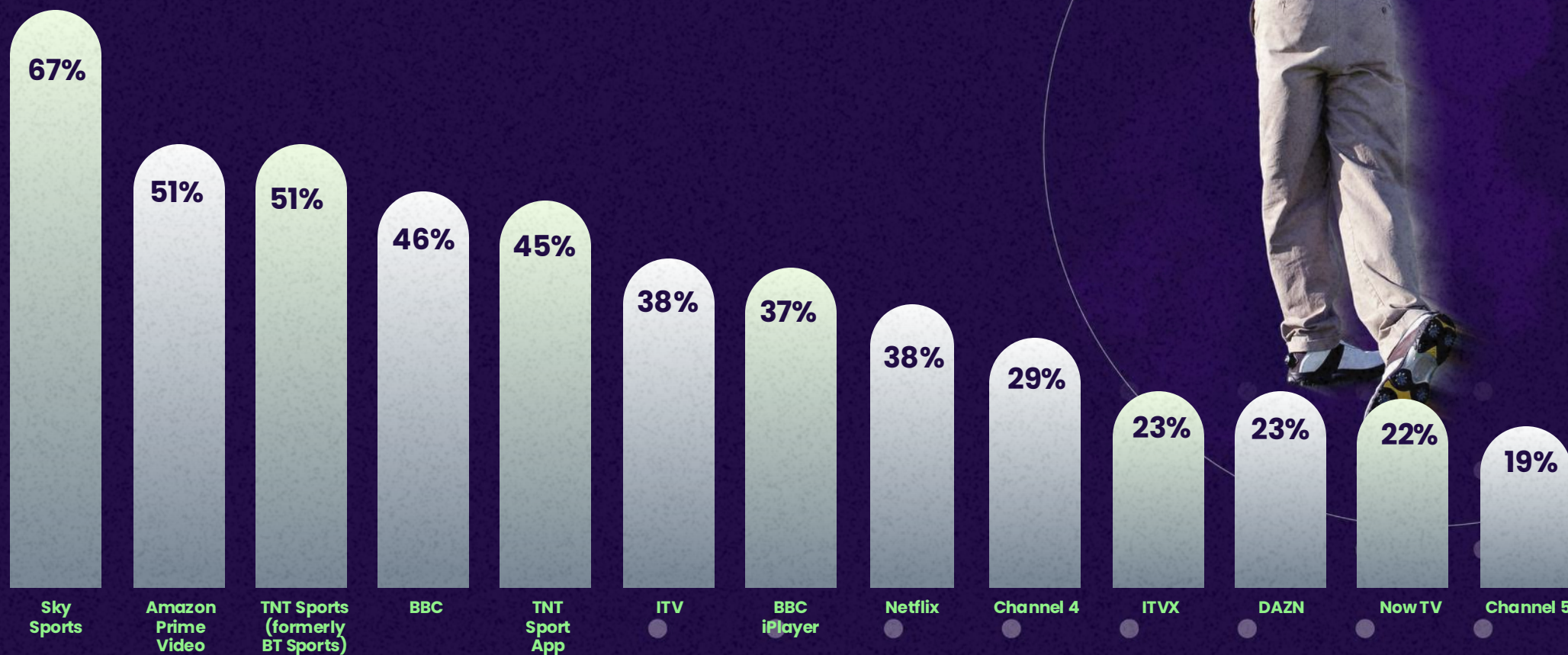


Source: Nexxen. Inside Live Sports: Streaming, Linear, CTV, digital and the complexity of today's landscape for live sports fans. Fielded December 2024. UK data. Among A18+ who are regular live sports viewers. N = 1,062.

Confusion Over Who's in the Game

In most cases, less than half of fans associate live sports with CTV platforms. Sky Sports, Amazon Prime, and BT Sports are leading the digital pack in live sports association.

Platforms Fans Associate with Airing Live Sports



Subscription Burnout

Live sports fans are frustrated by aggregated costs and the complexity of subscriptions, leading to high churn rates.



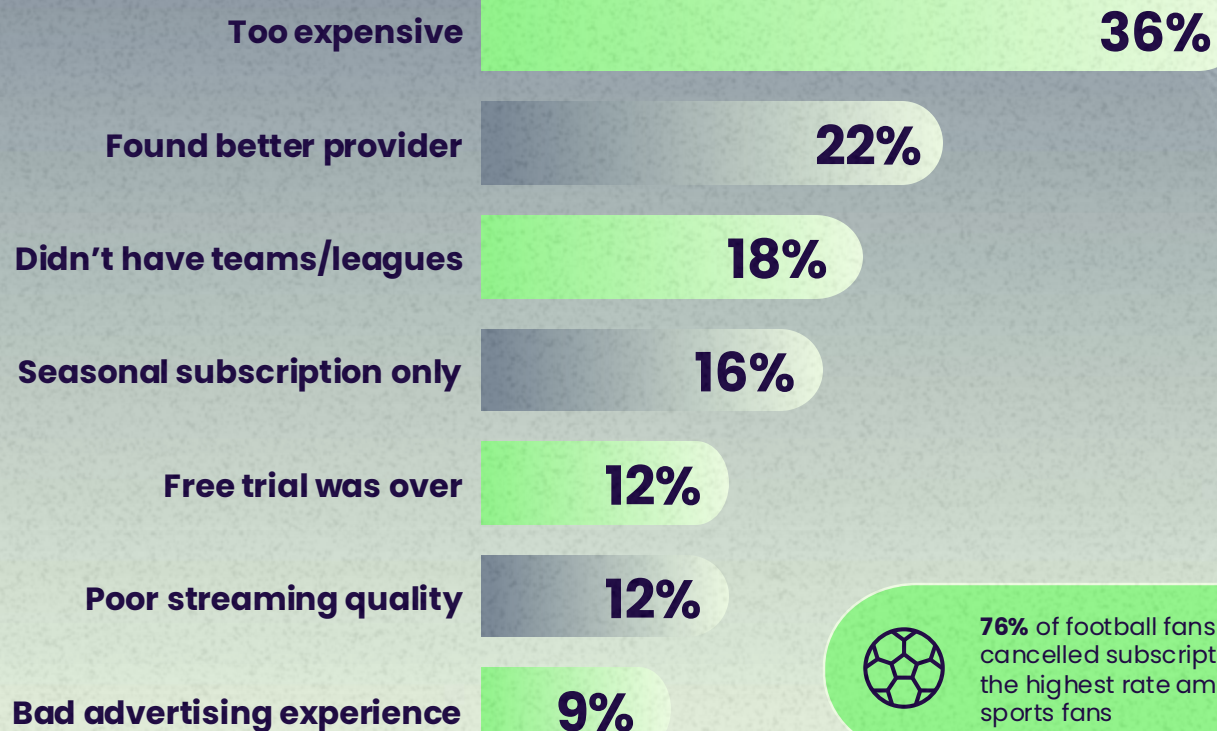
40%

are frustrated by
needing too many
subscriptions

42%

canceled a
streaming service
they previously
used

Why They Cancel Subscriptions



76% of football fans have
cancelled subscriptions –
the highest rate among all
sports fans

Source: Nexxen. Inside Live Sports: Streaming, Linear, CTV, digital and the complexity of today's landscape for live sports fans. Fielded December 2024. UK data. Among A18+ who are regular live sports viewers. N = 1,062.

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How Creative Resonates

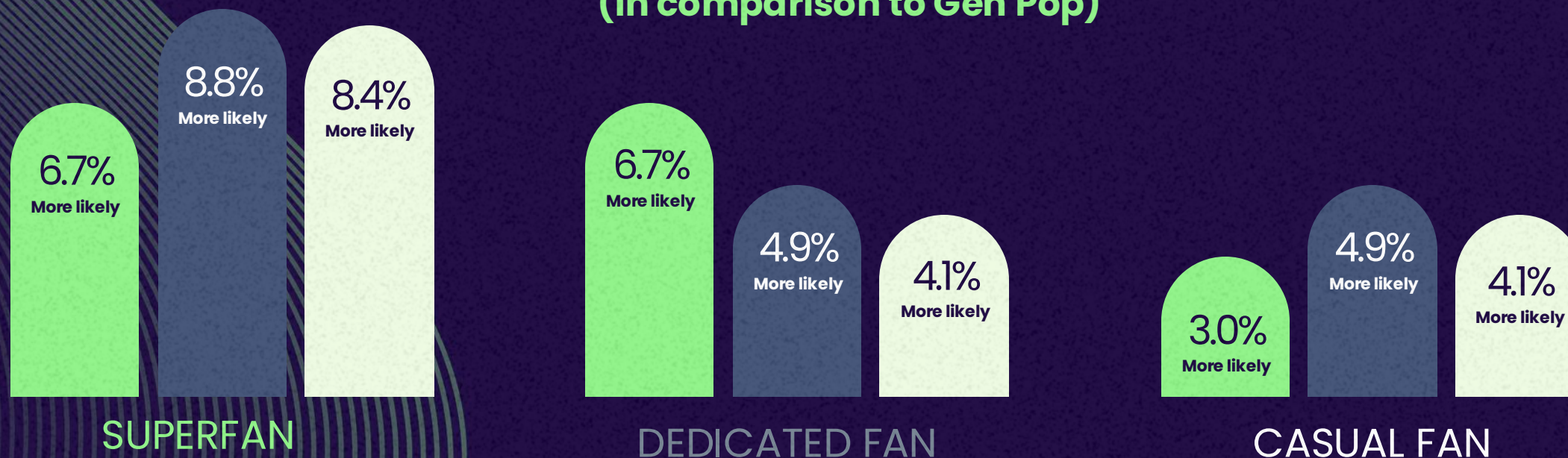


Live Sports Fans are Receptive to Creative

Creative accounts for roughly 50% of a campaign's success, and fortunately for brands, live sports fans respond more positively to ads that resonate with them compared to the general population.*

Superfans are the most receptive fan group, delivering the greatest lower-funnel lift compared to the general population. However, Dedicated and Casual Fans also exhibit stronger positive reactions, further proving their heightened responsiveness to ads.

Superfan, Dedicated Fan and Casual Fan Ad Responsiveness (in comparison to Gen Pop)



Brand Recall

Search Intent

Purchase Intent

*Nielsen Catalina Solutions, 2017
Source: Nexxen Studio Creative Insights Data: 2021-2025

Creative that Drives Emotion Drives Action

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Ads that convey warmth are strongly linked to lower-funnel lift, while unclear messaging can cause confusion and weaken responses. Happiness follows closely behind warmth as a key driver of positive responsiveness.

Our different fan personas respond differently to creative. Superfans respond more positively than other groups to Hilarity (funny ads), whereas Casual Fans have a predilection towards Nostalgia.

Measured Emotional Response to Ads



Example:
An ad for a cybersecurity firm that explains how to spot a scam

Example:
A gameshow ad where the premise is unclear

Example:
An ad for washing powder where the focus is on family, not laundry



Higher % of Audience Experiencing Emotion Lower % of Audience Experiencing Emotion

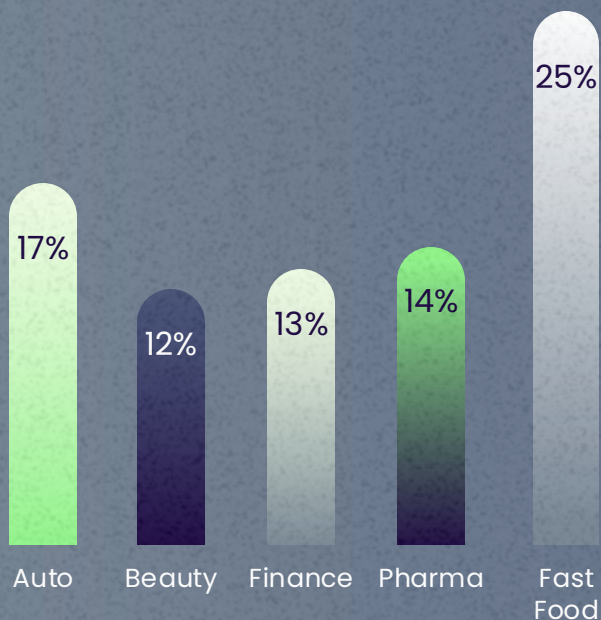
Major Verticals Benefit From Emotion-Driving Ads

Across major verticals, ads that evoke warmth and happiness are the biggest drivers of lower-funnel lift.

Superfans are most receptive to happiness, particularly in Fast Food ads, while Dedicated and Casual Fans respond best to warmth, especially in pharma ads.

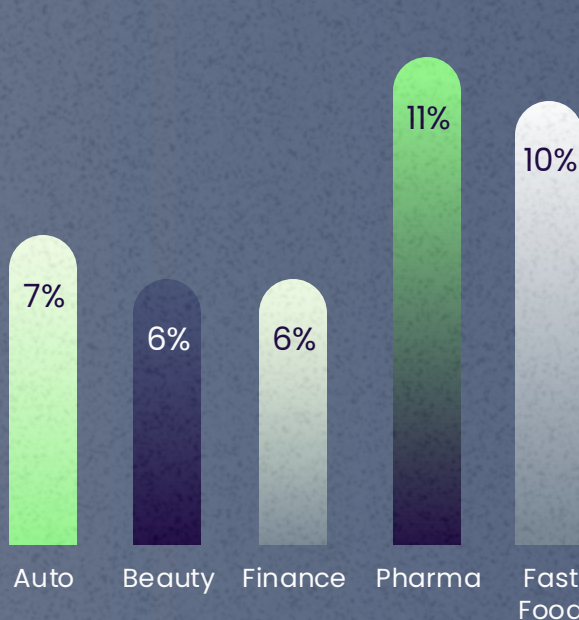
Avg Lift (+) in Purchase and Search Intent
from Ads Evoking **Happiness**

SUPERFAN

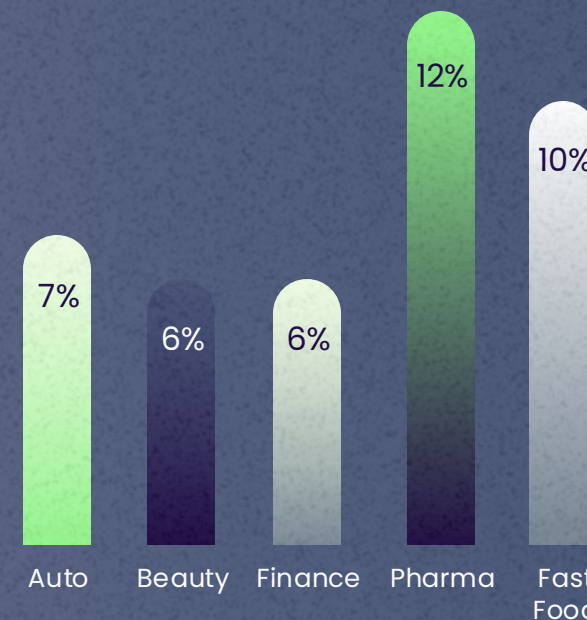


Avg Lift (+) in Purchase and Search Intent
from Ads Evoking **Warmth**

DEDICATED FAN



CASUAL FAN



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Smarter Live Sports Audiences

Omnichannel Campaigns are Key

Reach audiences across devices to make sure you're making the most of your campaign.
For example, Superfans are most likely to dual-screen during the game.

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SuperFan Audience

Example Media Plan

Media

CTV

Online Video [OLV]

Mobile

Display

Creative

Brand Building

Brand + Performance

Performance

Performance

Timeline

Week 1- 10

Week 4-10

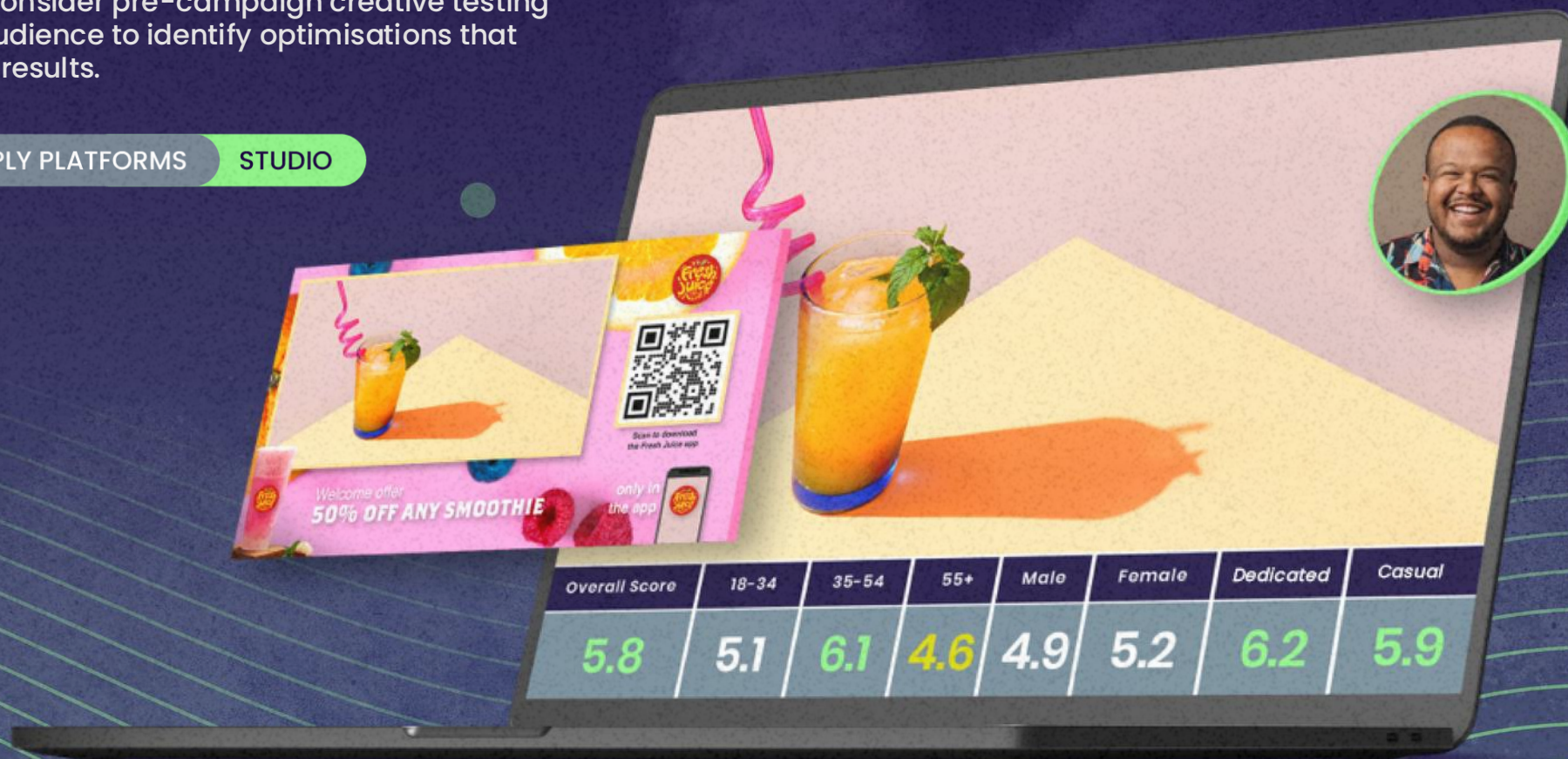
Match Days

Week 5-10

Emotions Matter in Creative

Ads that evoke happiness and warmth resonate widely with sports fans. To maximize impact, consider pre-campaign creative testing with the target live sports audience to identify optimisations that drive stronger lower-funnel results.

n | DEMAND + DATA + SUPPLY PLATFORMS | STUDIO



Use ACR Data to Reach Fans Away From Sports

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ACR data can tell us what viewers have watched and enable us to reach them during other shows or on other devices and media, such as mobile or online video.

For example, re-target previously unreachable viewers of the London Marathon (BBC) on a FAST channel.

TV Intelligence



1 Understand Behaviour

Viewer behaviour from TV engagement is captured using automated content recognition (ACR).



2 Create Audiences

We then use this data set to create audiences, either deterministically or probabilistically, and make them addressable.



3 Activate

Here's the fun bit. You can then use the addressable segments to activate on – across media such as CTV, display, OLV, or mobile.

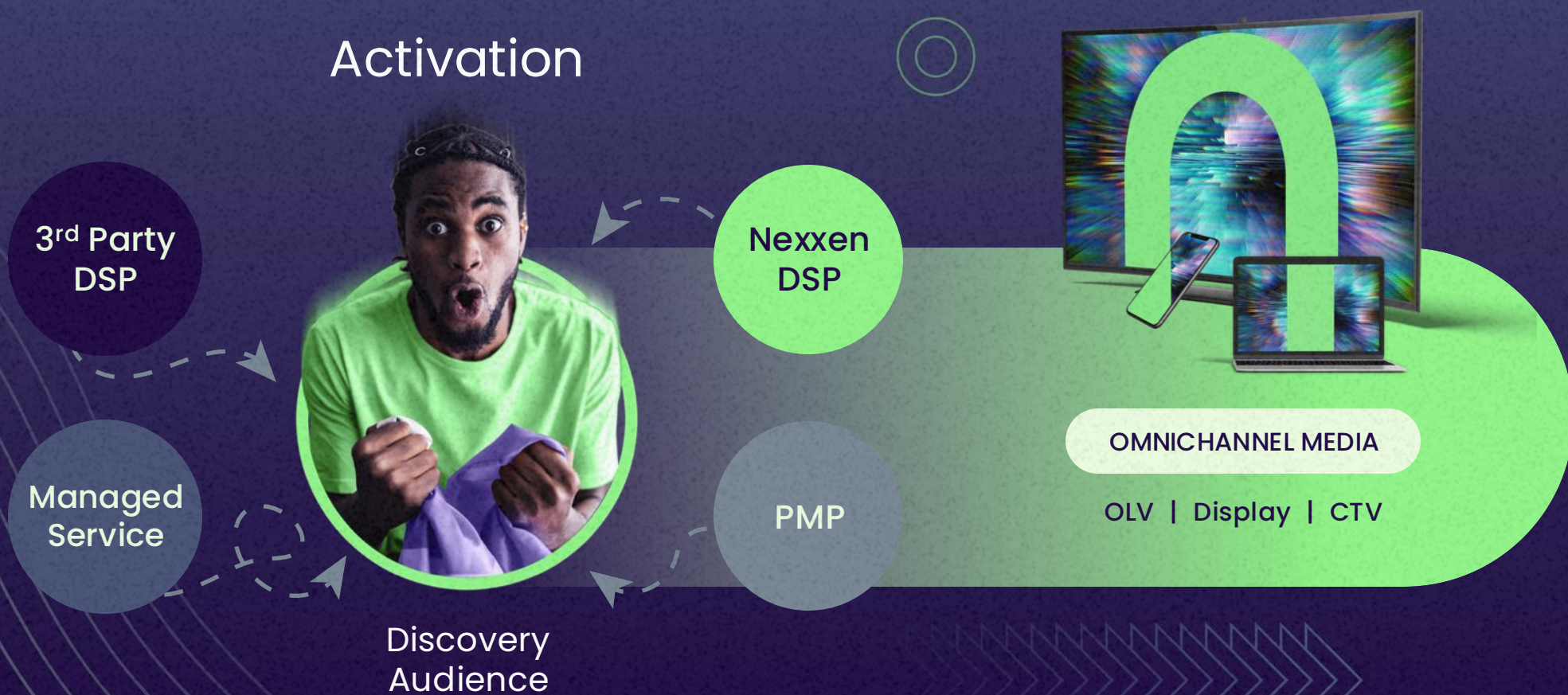


Understand and activate audiences with Nexxen Discovery

Our Discovery Audiences allow you to dig down further into Dedicated Fans, Casual Fans, and Superfans and uncover their passions beyond live sports.

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Activation





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www.nexxen.com

Learn More