

# 2024 Global Sports Survey

Chapter 1: Evolving Fan Habits





# Welcome to Altman Solon’s 2024 Global Sports Survey

The sports media sector is rapidly transforming. While streaming aggregators aim to reconsolidate the landscape for greater efficiency, they still fall short of matching the reach and revenue of traditional broadcast models, causing significant disruption.

This shift highlights the urgent need for a broader commercial framework between rights owners and media partners, transitioning from legacy to new distribution and monetization strategies. The key challenge is staying relevant across all fan segments – especially younger fans and niche communities.

To navigate these changes, the industry must embrace key drivers of growth and innovation, such as artificial intelligence (AI), private investment, and geographic expansion. The Middle East, in particular, continues to solidify its importance in the global sports market, positioning itself for future growth.

In light of these evolving dynamics, we are excited to present Altman Solon’s 2024 Global Sports Survey – a platform designed to foster insights and spark much-needed dialogue on the future of the industry among all stakeholders.

This report is the 1st of 5 publications and focuses on:

1

Evolving Fan Habits

November 2024

2

Sports Rights Monetization

December 2024

3

Investor Perspectives

January 2025

4

AI & Innovation

February 2025

5

Middle East’s Sports Growth

March 2025

## The Survey

Online survey of **220 senior sports executives globally**, including rights owners, media distributors, and investors, and **~3,000 consumers interested in sports in 5 countries**: U.S., U.K., Germany, Saudi Arabia, and China; the survey was fielded in June to September 2024, supplemental consumer data provided by GWI.



## The Firm

Altman Solon is the **largest and leading global strategy firm exclusively focused on telecommunications, media, and technology (TMT)**.  
**Over 600 consultants across 14 offices** worldwide and a **trusted advisor to C-level executives** from blue-chip companies operating in 100+ countries.  
We have completed demanding assignments for a **wide range of high-profile sports businesses and their investors**, developing a holistic view of the **value chain and its key trends**, and our focus on TMT can help sports **accelerate its transformation**.

Learn more at <https://www.altmansolon.com>

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To remain relevant across all fan segments amid fragmented media habits, it is vital for sports to expand content distribution and diversify pricing options

Market Indicators

1

Consistent Interest, Fragmented Habits

1

General interest in sports remains high, across all generations

2

Yet media habits vary by age, with younger fans watching more highlights and fewer live games compared to older generations, putting pressure on the industry's core product

3

65% of sports executives are concerned that live sport is losing relevance, and only 19% think that the industry is proactive enough in addressing this challenge

2

Fans' Content Discovery and Access Challenge

4

In Europe, only around two-thirds of followers of top football leagues regularly watch live games, presenting both a threat and an opportunity

5

Indeed, 66% of fans struggle to access their favorite sports, and 56% indicate they would watch more if accessibility were improved

6

43% of fans express some level of interest in sports but are unwilling to pay, implying that current pricing model is not effective for all segments

3

Outlook: Expanded Pricing and Distribution

7

Sports media outlets should introduce lower-priced tiers to expand content access, while ensuring that premium tiers offer differentiated services valued by high-paying fans to avoid cannibalization

8

The most popular way to follow sports is via friends and family

9

Rights owners must expand their distribution networks beyond incumbent partners to use the growing influence of digital communities

Our Take

- We believe the industry has reached a turning point, as younger, newly addressable fans are showing an eroding interest in watching sports
- This is particularly true for the live format, which remains the lifeblood of the industry
- For executives, the key challenge is converting younger fans' interest into live viewership, as live sports' value cannot be structurally matched by alternative formats
- This transition requires improving content discovery at the top of the funnel and enhancing access at the bottom. New pricing models are essential for boosting access, while discovery depends on building awareness among fragmented content gatekeepers – from free streaming platforms (e.g., FAST) to niche communities
- All in all, our take is that the industry must urgently upgrade its product and commercial model – not only to strengthen its core, live offering, but also to meet the expanding demands of content buyers and fans, as sports storytelling evolves into an ever-wider range of formats and experiences

An illustration of a male athlete in a white tank top and orange shorts, captured in a dynamic running pose. He is wearing white sneakers and has a focused expression. The background is a solid dark blue, making the white and orange of the runner stand out.

altman solon

2024 Global Sports Survey

Evolving Fan Habits

3





1

## Consistent Interest, Fragmented Habits



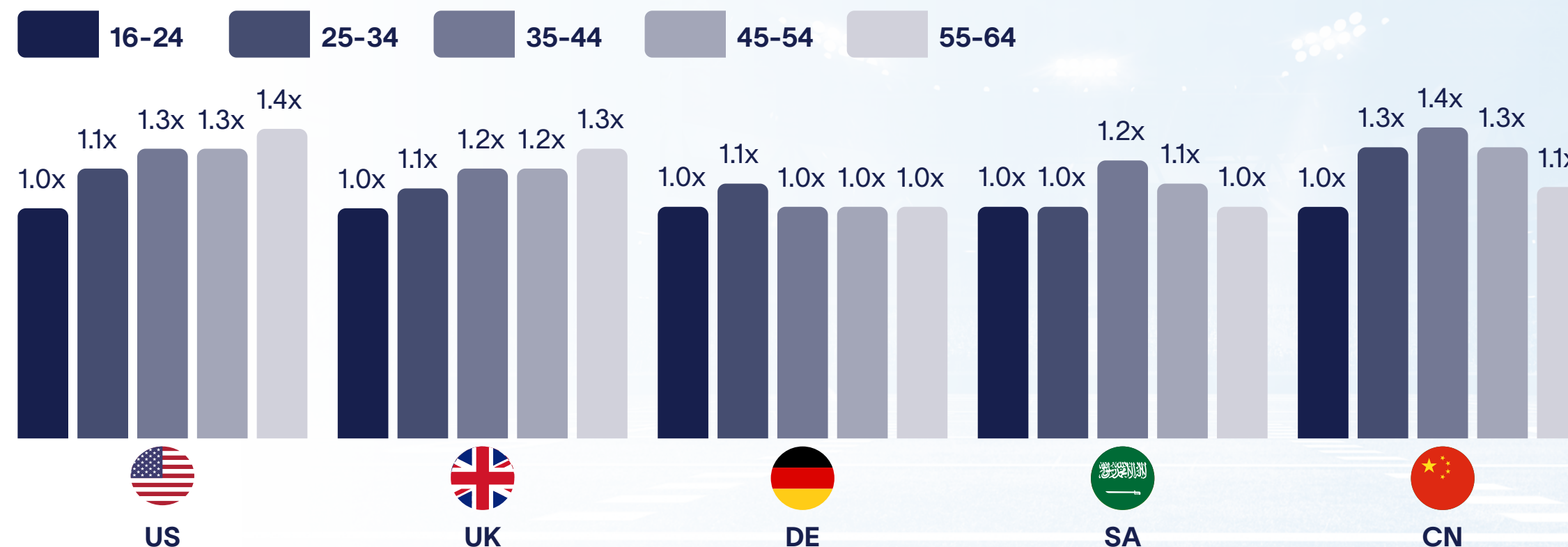


## Older generations show higher sports viewership compared to younger ones; this contrast is more pronounced in the U.S. / U.K.

INTEREST IN SPORTS – BY AGE GROUP

### How interested in watching sports are you?

% of respondents at least somewhat interested in watching sports  
Indexed to 16-24 age group set as the baseline (1.0x)



“Industry leaders need to fundamentally rethink the entire fan experience to attract younger fans to their sport, and that goes beyond providing free highlights on social media.”

- CEO, Sports Technology Provider

Source: GWI Core Survey N=285,608, Altman Solon



### Key Insights:

- Generally, interest in sport remains **robust across all age groups**, with ~60% indicating they watch sports at least once a month
- However, **younger generations are showing less interest in sports compared to older ones**, signaling a **risk of erosion** in the relevance of sports as a media product over time
- We believe this may be influenced by **younger age groups adopting more diversified media habits**, as easily accessible entertainment options increasingly **compete with sports for their attention**



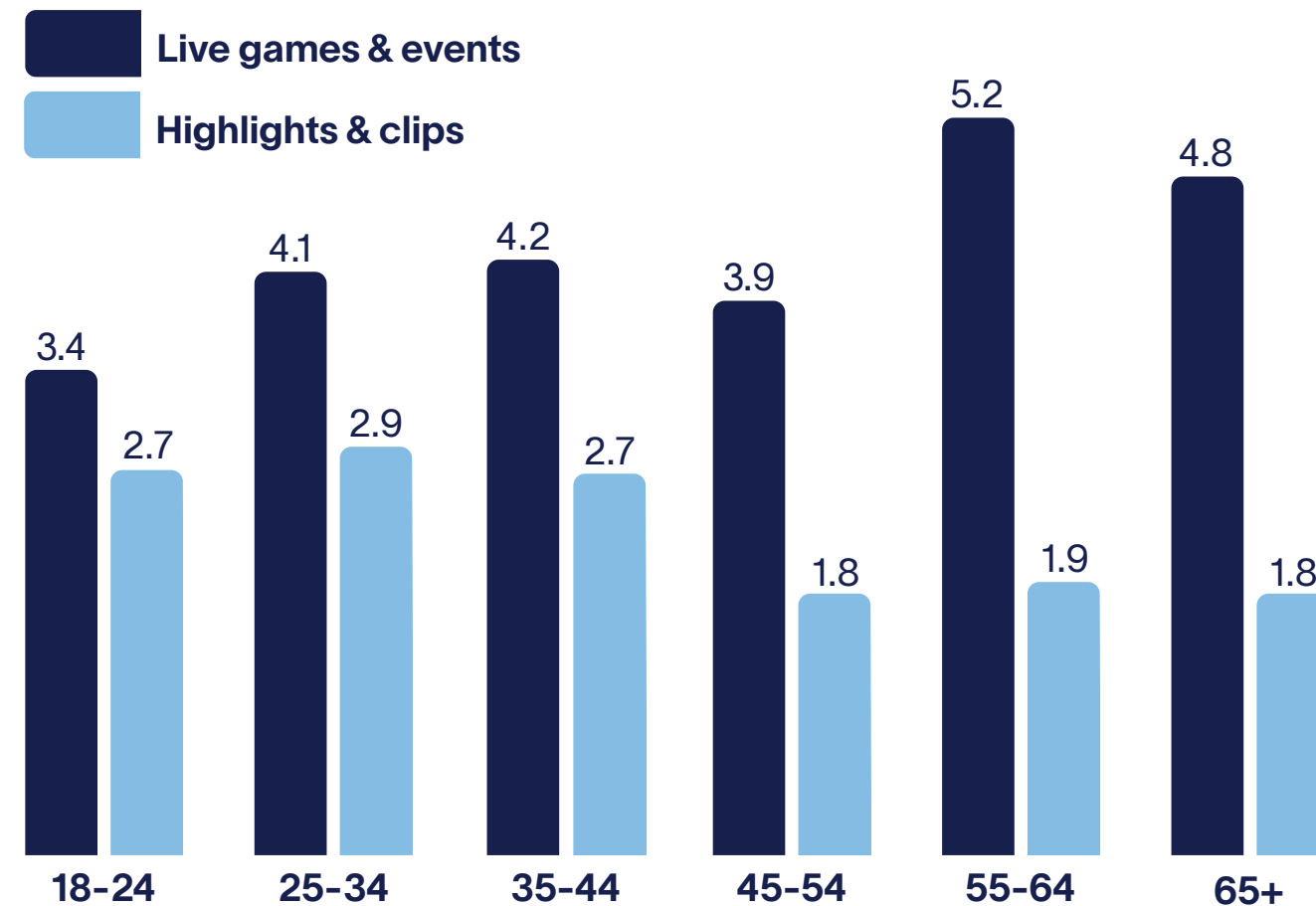


## Younger fans are, on average, watching more highlights and fewer live games, valuing convenience and quick access to results

SPORTS CONTENT TYPE PREFERENCE – BY AGE GROUP

### How long do you spend watching these sports content types weekly?

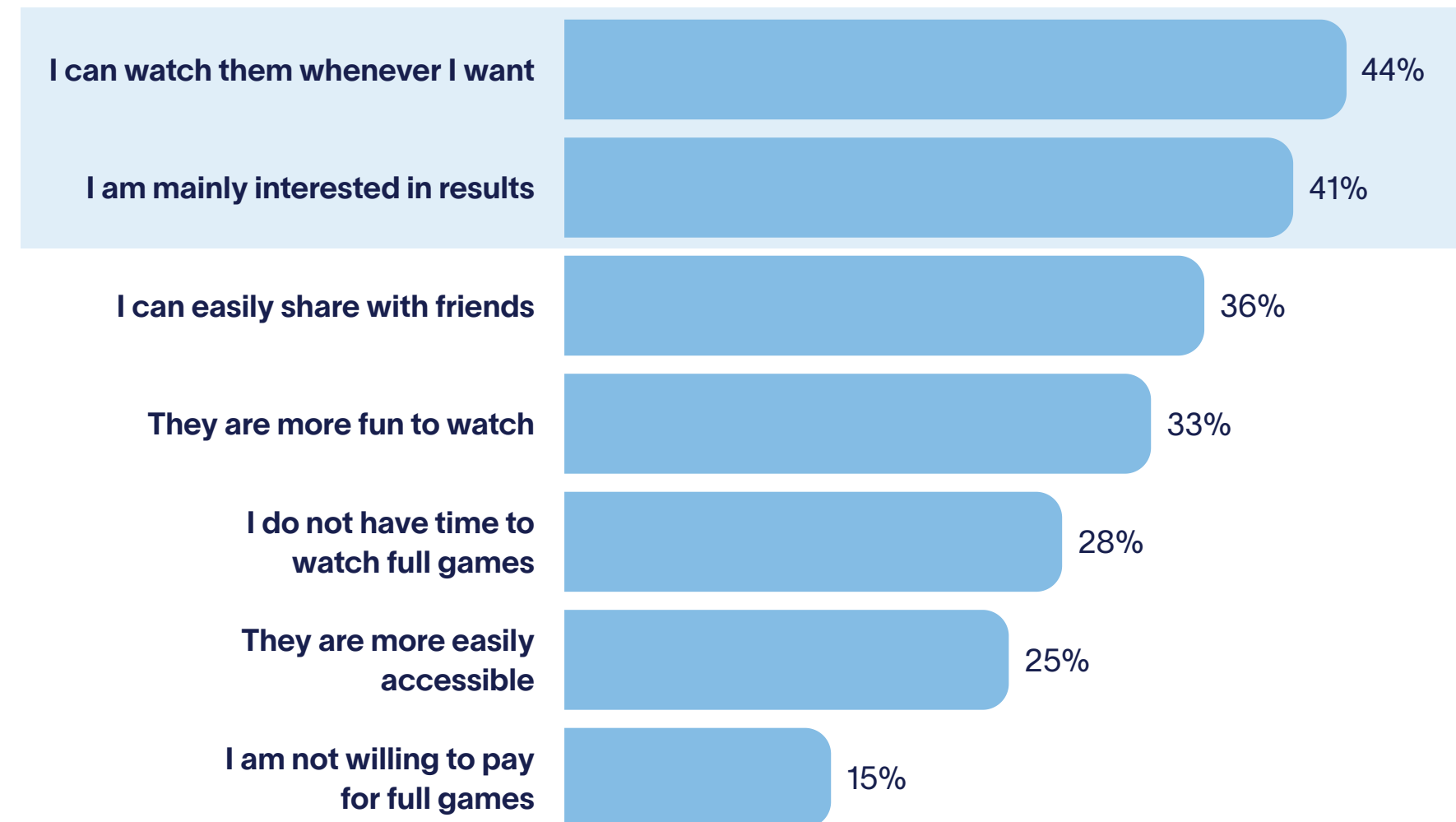
Hours per week, N=2,940



While all age groups still primarily watch live games, **younger generations are watching fewer than their predecessors** and are **increasingly substituting them with highlights**

### Why are you watching more highlights than live games?

% respondents in 18-24 age group, N=456



Younger fans who watch more highlights than live cite **convenience** and **“to-the-point” access** as the main factors, while also highlighting the importance of **shareability**

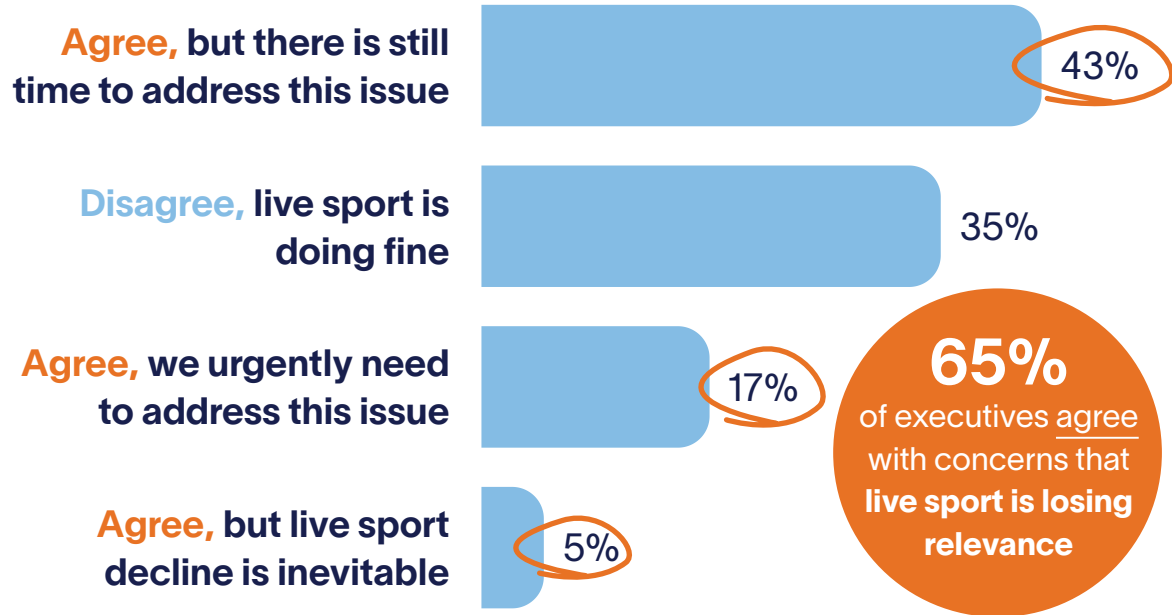
Source: Altman Solon 2024 Global Sports Consumer Survey (N=2,951)



65% of executives fear that live sports are losing relevance; to counter this, boosting the media product is seen as key initiative

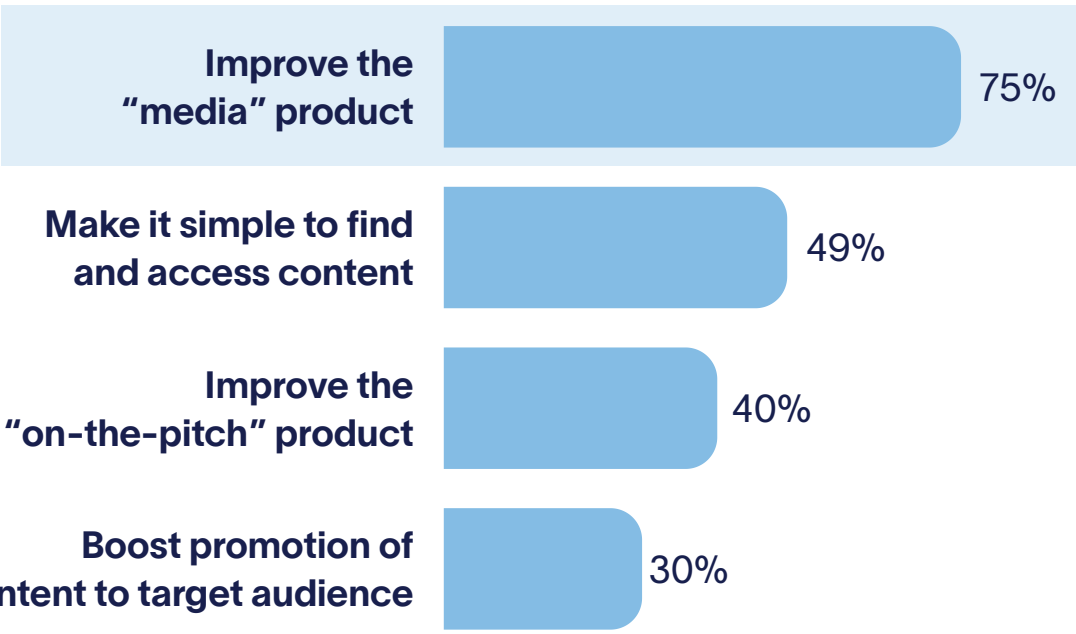
DECLINING RELEVANCE OF LIVE SPORTS

There are growing concerns that live sports lose relevance, as younger generations may prefer on-demand and short-form content. Do you agree?



Which of the following initiatives are key to maintain and grow the relevance of live sports?

% of respondents who chose "Agree, we urgently need to address this issue" or "Agree, but there is still time," N=118



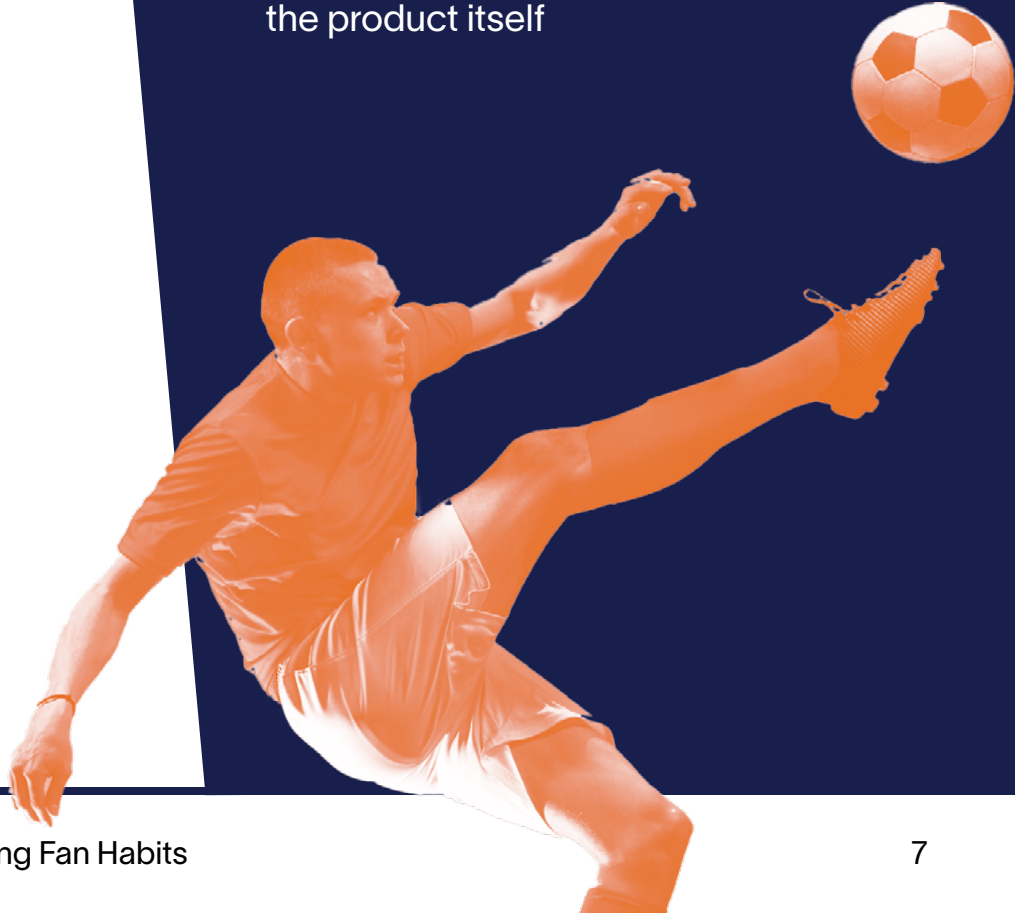
Key Insights:

- Most sports executives believe **live sports are at risk of losing relevance**, implying that **the industry's core product could be threatened in the mid- to long-term** if no action is taken
- Industry leaders believe the best way to address this is by **enhancing live sports as a media product** (e.g., with immersive and interactive features) while also **improving its accessibility**
- We perceive that **improving access through a wider distribution network** is as impactful – if not more – as enhancing the product itself

“With sports being inherently live and time-sensitive, it is crucial to make consumers aware of upcoming content in real-time. Technology can help to create an infrastructure that connects fans to live events more efficiently.

- Christian Mueller, Managing Director, Partners for Sports

Source: Altman Solon 2024 Global Sports Executive Survey (N=220)



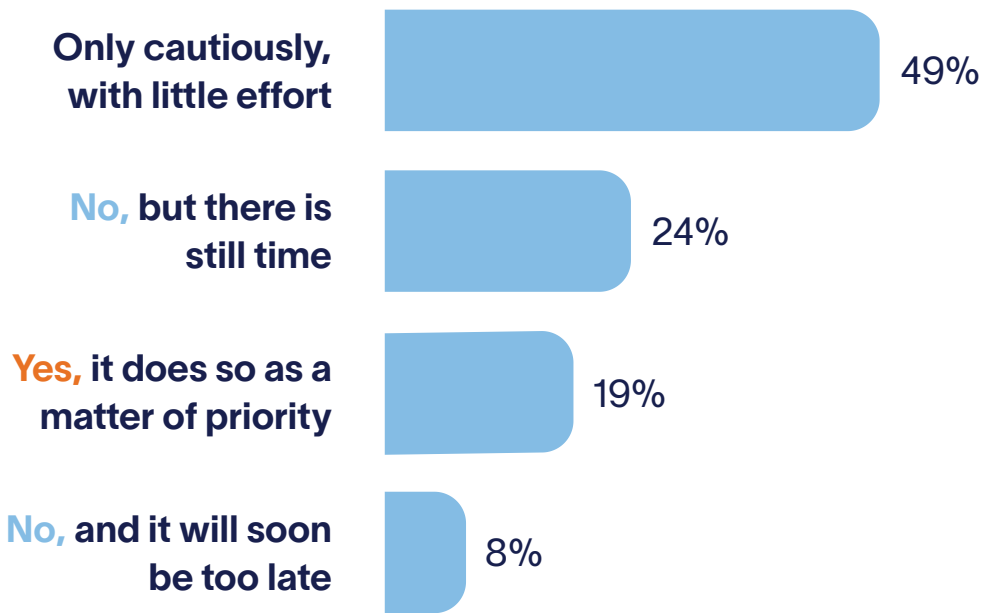


# Many believe that complacency is preventing sports leaders from being proactive in responding to changing fan preferences

INDUSTRY RESPONSIVENESS TO FAN PREFERENCES

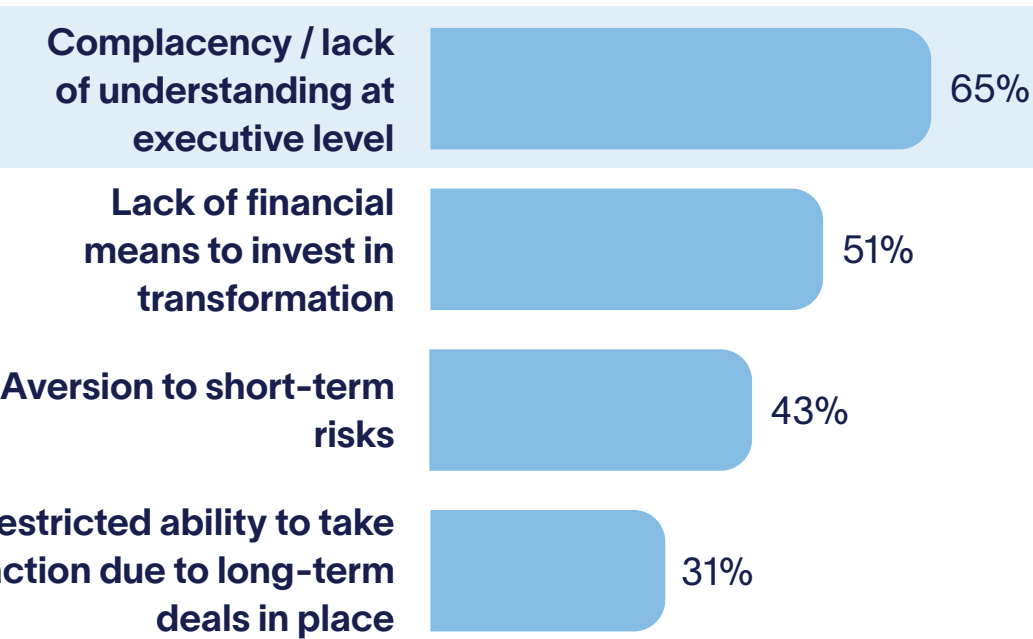
Do you think the sports industry is proactive enough in responding to changing fan preferences?

N=203



What are the top two reasons preventing the sports industry from proactively responding to changing fan preferences?

% of respondents who chose "No" or "Only cautiously," N=65



“The old models will have to change and, to achieve this, giving more attention to fans is key, including by leveraging data around the live experience – both broadcast and on-site – and through first-party digital platforms.

- Sandy Case, SVP Sport, Creative Technology

Source: Altman Solon 2024 Global Sports Executive Survey (N=220)



Consistent Interest, Fragmented Habits

## WHAT LEADERS ARE SAYING

### Key Insights:

- Only 19% of executives believe the sports industry is currently **actively addressing changing fan behaviors**, with most respondents noting that **“little effort” is being made**
- Sports leaders cite **complacency and a lack of understanding of the environmental changes impacting the industry** as key reason for this perceived inaction







# 2

## Fans' Content Discovery and Access Challenge

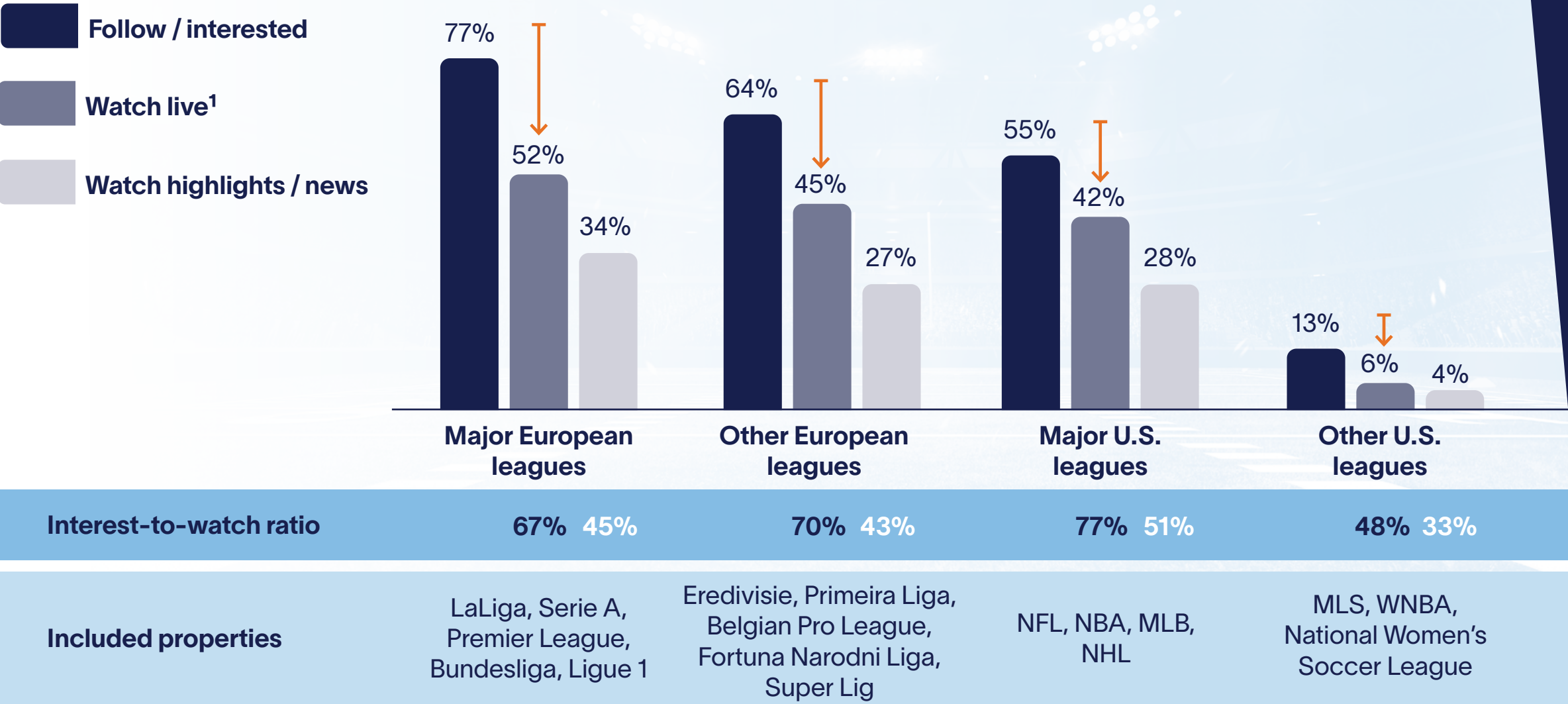


Only about two-thirds of fans interested in top European football leagues also watch live, likely due to accessibility issues and reluctance to pay

INTEREST AND VIEWERSHIP LEVELS FOR SELECT SPORTS PROPERTIES

Which professional leagues do you follow / have any interest in, and watch?

% among respondents interested in watching sports, all countries<sup>1</sup>



1) Average of "Watch live sports on a TV channel" and "Watch live sports on a streaming service"  
Source: GWI, Altman Solon

Key Insights:

- In **Europe**, only **67% of followers of a major professional football league watch live games regularly**
  - This suggests that a **significant number of fans are not engaging with the live media product**
  - Potential reasons for this include **content accessibility issues, limited willingness to pay, or shifting preferences** in content formats (e.g., favoring docuseries over live games)
- Major **U.S. leagues are more effective at converting** interest to live (i.e., 77%)
- As rights owners primarily capture value from live content, there is an opportunity to **unlock additional value** by adapting to these fans' needs and preferences





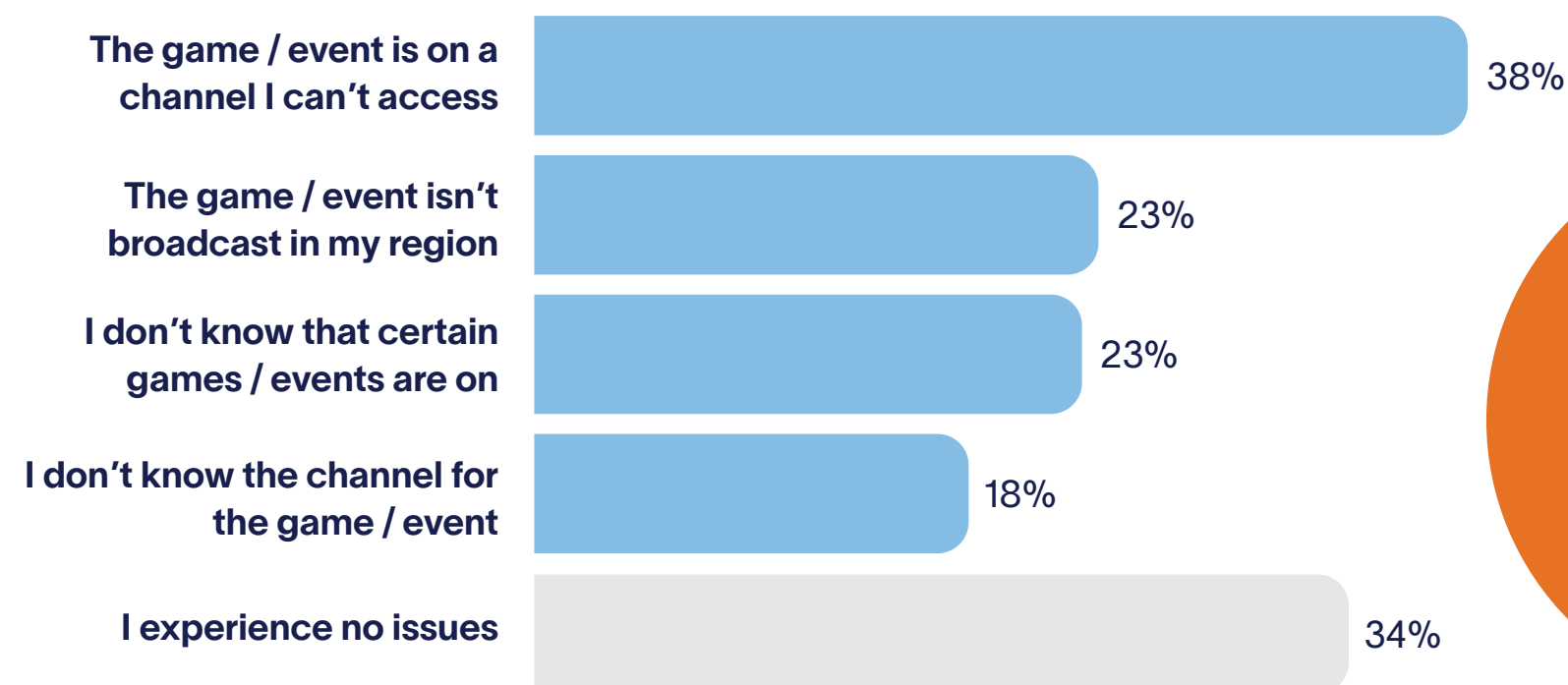


**66% of fans struggle to access their favorite sports, and 56% indicate they would watch more if accessibility were improved**

## FAN DISCOVERY AND ACCESS CHALLENGES

**Which of the following pain points do you experience while trying to discover and watch live broadcasts of your favorite sports?**

% respondents selecting answer for any league / property they consider essential



**66%**  
of respondents encounter **at least one issue** accessing content related to their favorite sports



**In addition to its established prominence on Pay TV outlets, the accessibility of premium live sports on streaming platforms needs to be further promoted.**

- Sports Executive

Source: Altman Solon 2024 Global Sports Consumer Survey (N=2,951)



Additional research also suggests that

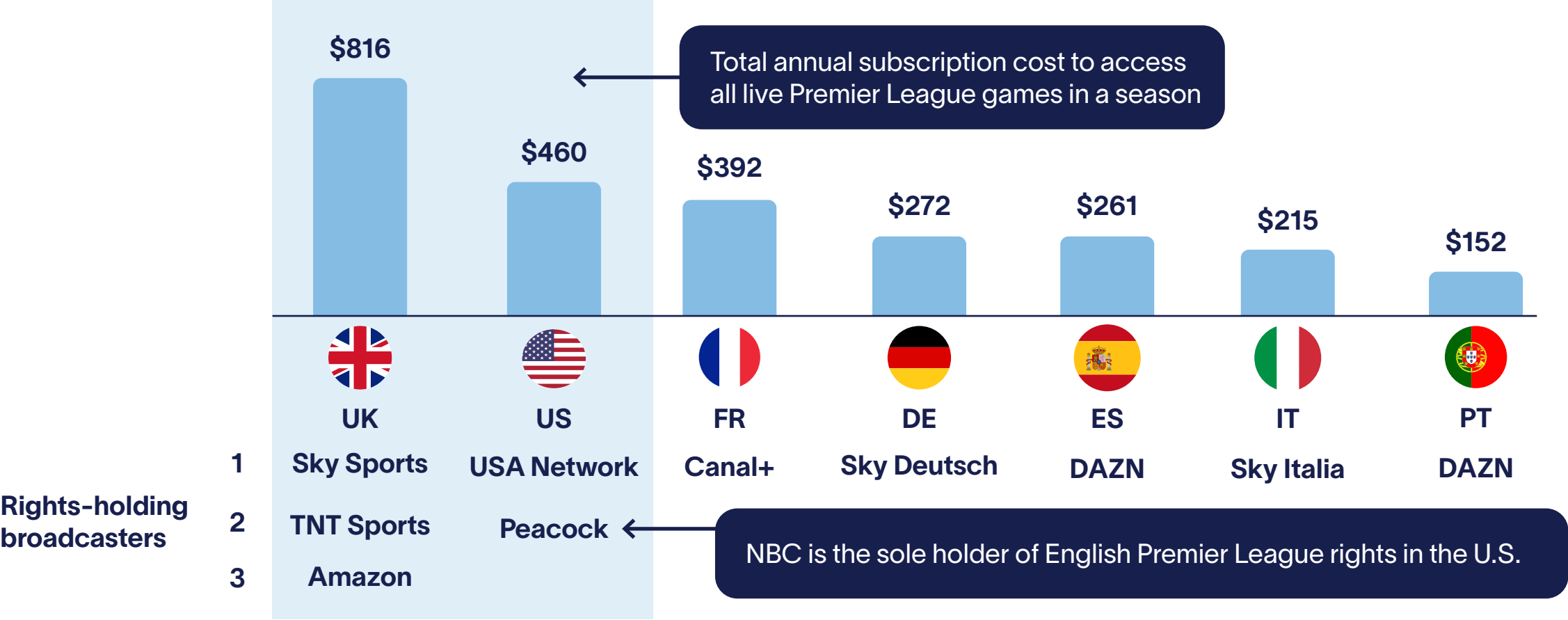
**56%**

of sports fans **would spend more time watching sports** if more content was accessible on their main platform, with 14% indicating they would watch significantly more

Subscription “stacking” and high price points are limiting access to the English Premier League games in select countries



CASE STUDY  
Required Subscriptions & Cost<sup>1</sup>  
2024-2025 Season, Yearly, \$USD



Key Insights:

- In the U.K. and the U.S., English Premier League (EPL) viewers are required to “stack” multiple subscriptions to access all games
- In countries where game inventory is consolidated on a single platform, the access model typically features “all-you-can-eat” subscriptions
  - This model lacks flexibility, especially for casual fans who may not be interested in the league’s full inventory
- We believe that high costs and consumption inefficiencies typically lead to significant value leakage, either through non-viewers or piracy

“The sports industry needs to think more carefully about media rights distribution. Maximizing profit must be balanced with exposure to the next generation of fans.”  
– Jay Tucker, Executive Director, Center for Media, Entertainment & Sports, UCLA







## 43% of consumers express some level of interest in sports but are unwilling to pay for current pricing models, implying major upside potential

INTEREST IN SPORTS VS. WILLINGNESS TO PAY (WTP)

### "How interested are you in sports?" & "How willing are you to pay to access sports content?"

% of respondents

		Level of Interest in Watching Sports					Total
		Extremely Interested	Very Interested	Quite Interested	Not Particularly Interested	Not Interested at All	
WTP for Watching Sports	Very Willing	5%	2%	1%	0%	0%	9%
	Willing	9%	14%	10%	1%	0%	34%
	Unwilling	4%	8%	13%	4%	0%	30%
	Very Unwilling	3%	5%	10%	8%	2%	27%
Total		21%	30%	33%	14%	2%	100%

**43%** of fans who are quite to extremely interested in sports are not currently willing to pay for sports content

### Key Insights:

- 43% of respondents are sports fans unwilling to pay for current pricing models on offer, making them particularly vulnerable to easy-to-access, low-cost illegal streaming options. If converted, these fans present a sizable upside opportunity for the industry
- To capture this potential, we are convinced that new monetization models are required
  - This could include freemium, lower-priced tiers, pay-per-view, and other flexible plans
  - Such models are especially relevant for casual fans, who represent the largest segment



Source: GWI, Altman Solon



# 3

## Outlook: Expanded Pricing and Distribution

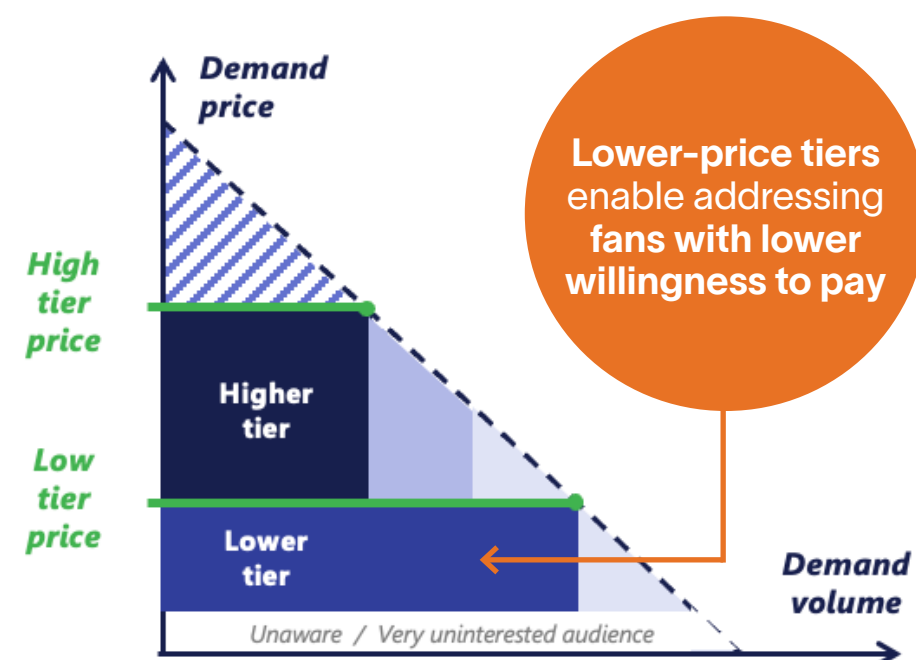




# Media outlets increasingly offer various tiers with a differentiated offering to broaden access without alienating high-paying clients

## TIERED PRICING STRATEGY & CASE STUDIES

- **Launching lower-priced, ad-supported tiers** to capture a wider market is a **growing strategy** among media services, yet it remains **underutilized for sports**
- To **mitigate the risk of cannibalization**, sports media retailers should ensure that premium tiers offer **differentiated services** valued by high-paying fans



Source: Altman Solon, Company information

## CASE STUDIES: Tiered pricing

### NETFLIX

Launch of ad-tier led to initial cannibalization, but most new subscribers still adopt premium tiers

#### Pricing Attributes:

- **Resolution:** 4K vs 1080P
- **Ad-free vs. ad-supported**
- **Simultaneous** screens
- **Pay-per-view (PPV)** options

#### Outcome:

- Ad tier **accounts for 45% of new account sign-ups**; most new sign-ups still opt for the more premium tiers
- Ad tier **caused initial downgrades**, but most subscribers are either **net new** or **previously churned**

### F1 TV

Live streaming and unique viewing features boosted high growth for premium tier subscriptions

#### Pricing Attributes:

- **Live stream** vs. replay only
- Access to **onboard cameras and team radios**
- **Greater access** to original content

#### Outcome:

- F1 saw **45% growth YoY** in Q1 2024, with **steady growth** in F1 TV subscription revenue

### DAZN

Combination of free, subscription, and pay-per-view options let fans optimize for their own WTP

#### Pricing Attributes:

- **Free, live content**
- **Monthly subscription** to premium content
- **Pay-per-view (PPV)** events

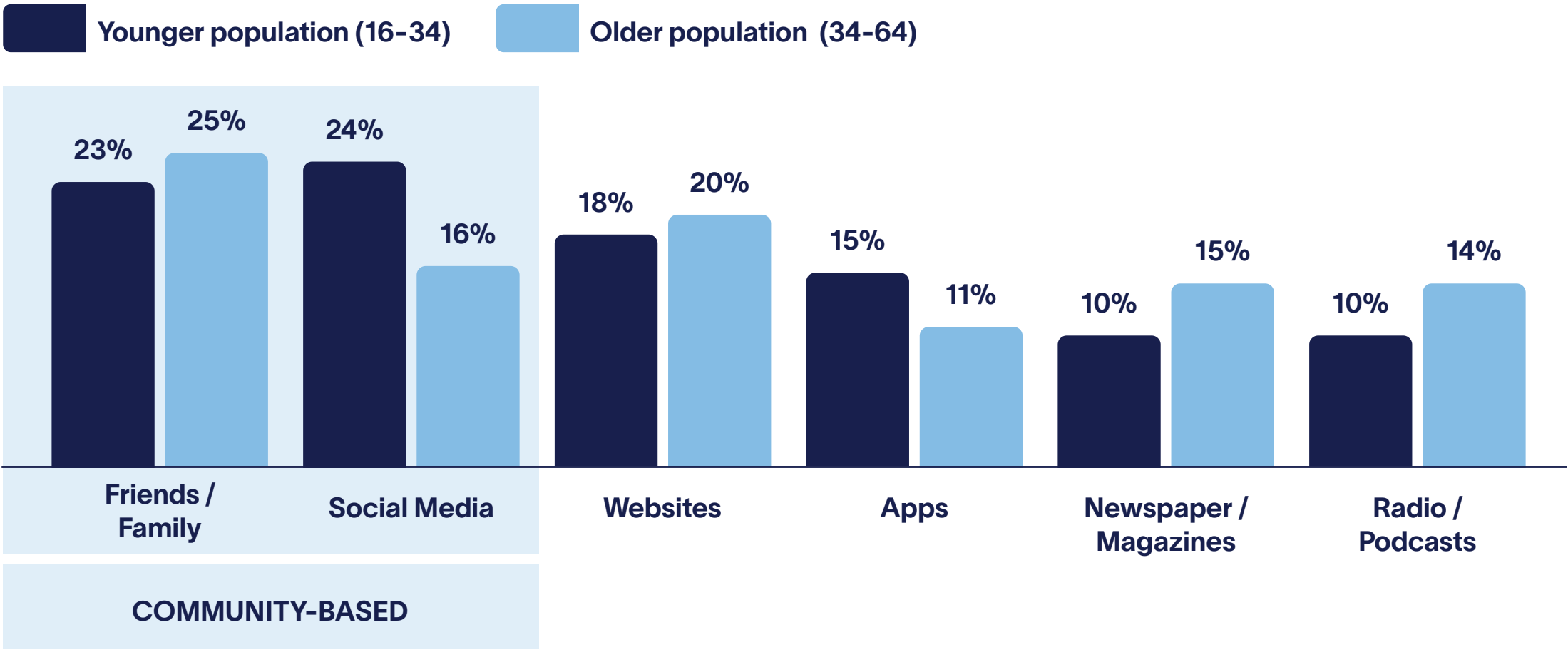
#### Outcome:

- Premium subscription and PPV options drive revenue for **high-demand leagues and events**
- Freemium tier allows DAZN to increase overall reach, with a goal of **1 billion monthly viewers by 2025**

Often overlooked, communities play a growing and pivotal role in generating interest in and awareness of sports

CHANNELS FOR KEEPING UP WITH SPORTS – BY AGE GROUP

In which ways do you follow / keep up with sports?



“The sports industry should invest in scalable digital ecosystems [...] and foster community-driven experiences, extending their reach.”  
– Motasem El Bawab, Chief Information Officer, N3xt Sports

1) Cheapest price available  
Source: Sportico, Altman Solon



Key Insights:

- The **most popular way to follow sports** is by **engaging with friends and family**
- Community engagement through **social media** is particularly prevalent among **younger fans**
- While sports rights owners have focused on building a broad presence on social media, **most have yet to fully embrace deeper partnerships with the “gatekeepers” of digital communities and interest groups**
- We envision a future where **rights owners directly collaborate with influencers and community gatekeepers**, not only to promote non-rights-protected content but also to **drive traffic to live events**, much like today’s **affiliate marketing** models

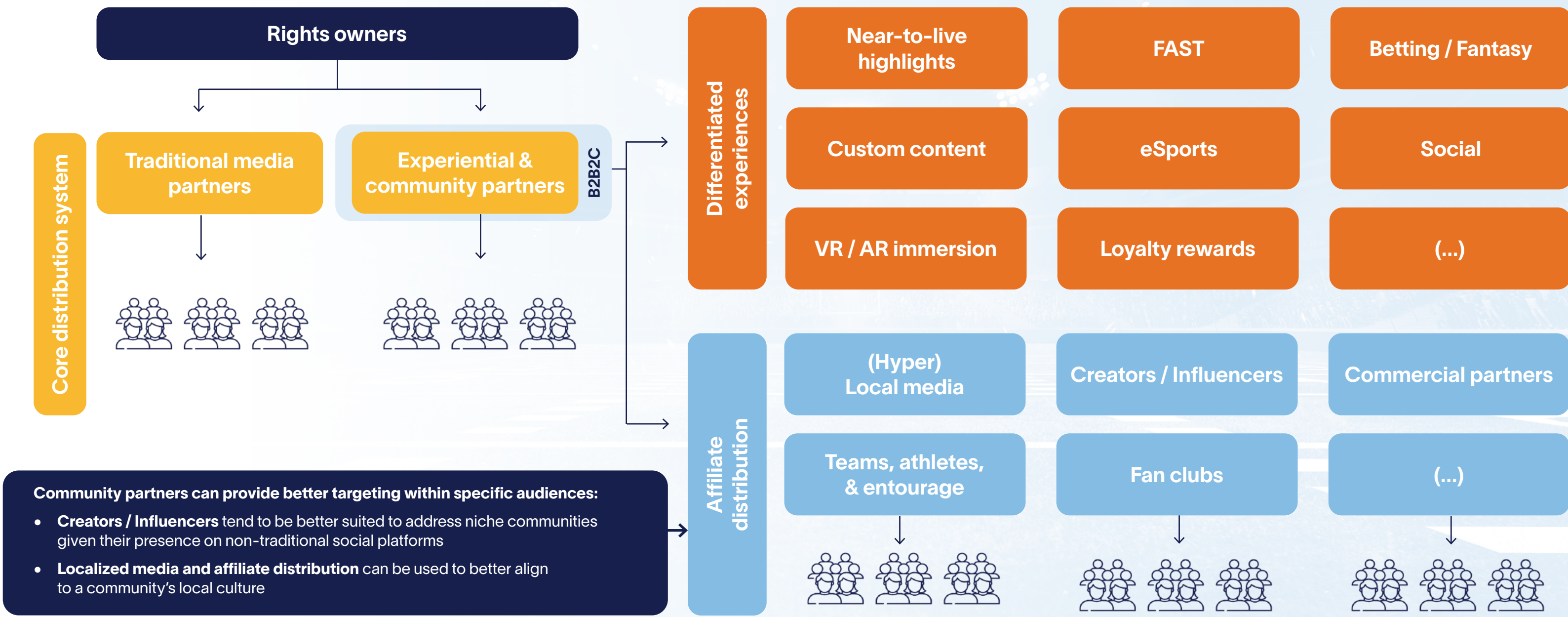




# Rights owners need to expand their distribution efforts beyond traditional media partners to engage digital communities



RIGHTS OWNERS' EXPANDED DISTRIBUTION MODEL – OVERVIEW



Source: Altman Solon

## To expand reach, engagement, and sustain fan base growth, we believe rights owners must build a balanced path from top-of-the-funnel to paid subscriptions

### Our Take

While **sports interest remains high across all age groups**, our research shows that **younger generations are engaging less with live sports than their predecessors**. This marks a **turning point**, as the relevance of the industry's core product faces a **growing threat** from the very consumers shaping its future.

This risk of **audience erosion** in specific segments and formats reflects the **accelerating fragmentation of fan demands** as well as **content supply**. For example, **Netflix**, with occasional live rights and a **deep library of sports docuseries**, is **overturning** the traditional model, which has historically relied on season-long events.

Beyond content preferences, **fans face two major issues** undermining the industry's value: **content discovery** and **access**. These challenges lead to **significant losses from piracy**, largely driven by the industry's reliance on subscription walls. This results in **insufficient top-of-the-funnel promotion** and a **lack of flexible pricing options** for casual fans.

To address these challenges and sustain fan loyalty, we are convinced rights owners must act **urgently** by:

- 1 Elevating the core live product** while **treating adjacent content types** (e.g., near-live, lifestyle) as a **standalone and equally important vertical**, catering to both consumer and media buyer diversity
- 2 Building a balanced path from top-of-the-funnel channels** (e.g., social, FAST) to **paid subscriptions** across all relevant content gatekeepers, including both media platforms and niche communities
- 3 Differentiating product and pricing** based on **value** rather than **volume** (e.g., feed resolution, number of concurrent accounts, advertising experience) to **capture underserved fan segments**
- 4 Expanding distribution efforts** beyond traditional media partners to **scale access to smaller communities**, leveraging new business models that **incentivize gatekeepers**

Properties that effectively address these issues will emerge as **clear winners** in fan base growth moving forward.

Source: Altman Solon



The industry must understand that current revenues largely come from fans who were onboarded 20 to 30 years ago, when premium content was freely available with broad exposure. Rights owners should invest in free-to-air; social media is not enough to cultivate a loyal fan base for the future.

- Andreas Kaeshammer, Head of Football & Senior Director, Infront Sports & Media

The industry needs to embrace the viewing habits of younger fans, especially by transforming the live viewing experience.

- Roger Hall, CEO, Uniqfeed

As creative businesses, we need to position our content where fans – and potential fans – spend their time; traditional distribution channels won't suffice.

- Sports Executive



Altman Solon is the leading global strategy firm focused on telecommunications, media, and technology

Our services in the sports industry:

- Strategy
- Target operating model
- Organizational design
- Go-to-market
- Financial planning
- Transaction support
- Feasibility assessments

Specific strategy services in sports media:

- Rights packaging and auctioning
- Media rights servicing
- DTC, OTT, and Web3
- Content features and pricing
- Fan behavior research
- Remote / virtual production



At Altman Solon we have built an impressive team of strategy professionals working at the crossroads of sports and media



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Our Research Partner

The consumer research included in this publication was collected by our partner GWI as part of an online survey fielded between August and September 2024



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