



Sports Fan Engagement, Content Monetisation and AI Trends Survey

Insights from 700+ sports media execs
to help you thrive in '25

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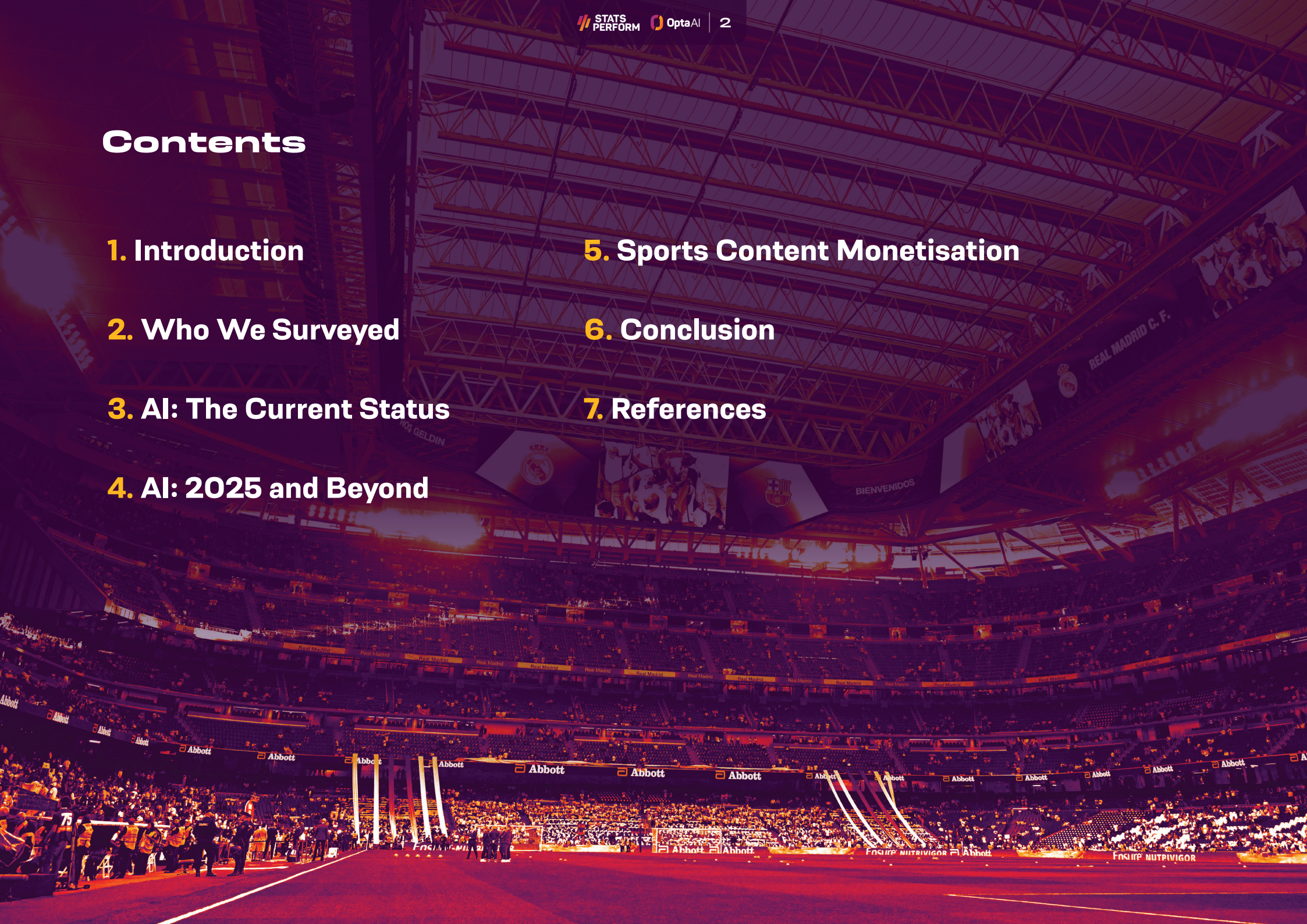
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A hand holding a tablet computer. The screen shows a soccer field with a heatmap overlay, indicating player movement or intensity. The background is dark and out of focus.

1

Introduction

Introduction

Many modern-day fans have grown up consuming sport via web and mobile-enabled channels. However, deep in the age of digital, are the opportunities and challenges for those in the business of sports fan engagement and monetisation becoming increasingly pronounced?

Is today's technology, notably AI, making it easier or harder for fan-facing brands, platforms and enterprises to attract and grow audiences? To retain their attention? To turn it into dollars?

Is the priority to win younger fans, women fans or global fans?

How important is first-party data? What is the broader impact of AI, in which Stats Perform is at the fore? Where and how is it already being adopted, and already making a difference?

We invited the global sports media industry to contribute their perspectives through our Stats Perform Sports Fan Engagement, Content Monetisation & AI Trends survey. Thanks to our global reach, nearly 750 executives answered our call, from representatives of leagues, teams, betting operators, brands and broadcasters to stadium operators and sponsors, allowing us to build a detailed picture of the timely trends and themes that are reshaping the industry, and identify which sectors and target regions are leading the charge.

The survey focuses on four key challenges for those in 6 different sectors of the sports fan industry: the impact of AI; monetising fans; women's sports fans; and younger fans.

Perhaps the strongest message from the global survey is that AI presents an unprecedented opportunity for fan engagement and monetisation, but that adoption is not yet uniform across sectors.

However, there is consensus about the impacts of its application: it is seen as a creativity and productivity expander, as illustrated by the word cloud that set the context for this survey. There is clear excitement about its time-saving benefits and also its impact on storytelling and content and perhaps most interestingly of all, **those who have already adopted AI report that it is 3x easier to commercialise their content**, compared to those who are yet to do so. We hope insights like these, and many others in the survey, help your sports media business to thrive in 2025.



Alex Rice

Chief Commercial Officer



Steve Xeller

Chief Revenue Officer



Dr. Patrick Lucey

Chief Scientist

WHAT MAKES YOU EXCITED ABOUT THE ROLE OF AI IN GROWING AND MONETISING YOUR AUDIENCE AND CONTENT?





Who We Surveyed

Who We Surveyed

A total of 740 sports media executives from across the globe answered our survey, split across multiple fan-facing verticals.

Nearly 85% of the respondents were from a team, league, federation, digital media platform, app, broadcaster or streaming platform.

Betting operators represented most of the remainder, while sponsors, brands, agencies, fantasy platforms and stadium operators also provided insightful responses.

Media roles were also fairly evenly split across different departments, including C-Suite, Product, Content, Editorial, Commercial, Marketing, Gameday Presentation, Production, Sportsbook Trading, Social Media and Customer Relationship Management (CRM).

Responses came from enterprises targeting fans all over the world. Europe, the Middle East and Africa (EMEA) was the most commonly-named target region for the execs who took part (63%) followed by North America (41%), Asia-Pacific (APAC – 28%) and Latin America (LATAM – 25%).

Execs from organisations including...





AI: The Current Status

AI is already impacting sports media fan and revenue growth and is about to increase.

Sports media companies who have already adopted AI are three times as likely to find it easier to commercialise their content than those who have not invested in the technology yet.

Early adopters of AI are finding it easier to commercialise their content

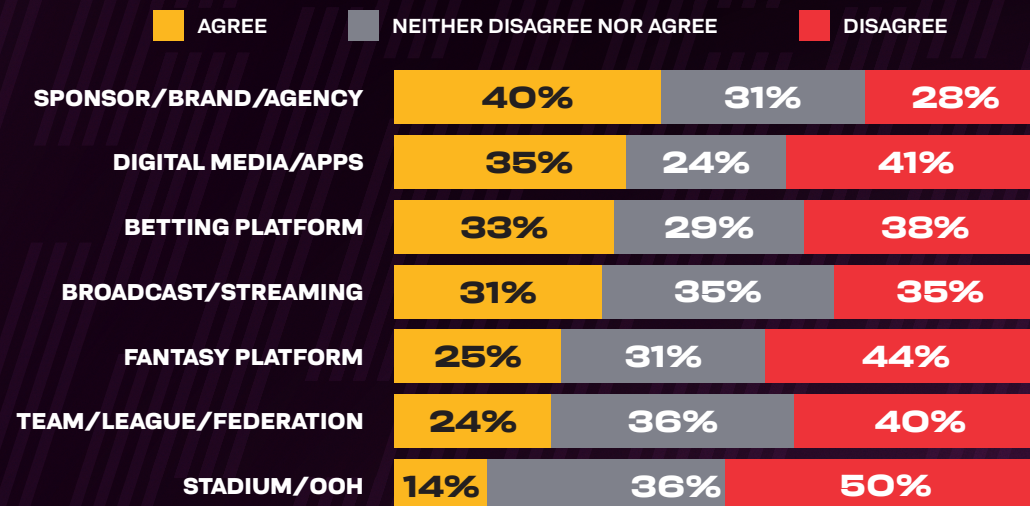
Sports media companies who have already adopted AI are three times as likely to find it easier to commercialise their content than those who have not invested in the technology yet.

Additionally, according to the survey a higher proportion of AI adopters (35%) said they've found it easier to commercialise their content than those who haven't implemented AI tools yet – with only 12% of them finding content commercialisation easier without the use of AI.

The fastest adopters are sponsors, brands, and agencies, of whom 40% agreed that AI is already helping them to commercialise their audience. There were also indications that some digital media and apps (35%) and betting platforms (33%) are also benefiting already.

However, sports broadcasters, teams, leagues and federations, stadiums and fantasy providers are not yet seeing the impact of AI on their ability to generate revenues to the same extent as their counterparts in other sectors – but that is set to change.

TO WHAT EXTENT DO YOU AGREE THAT AI IS ALREADY HELPING YOUR DEPARTMENT TO COMMERCIALISE YOUR AUDIENCE? (%)



% WHO SAID THEY ARE FINDING COMMERCIALISATION OF CONTENT EASIER

THOSE USING AI THOSE NOT USING AI

35%

12%

What makes you most excited about the use of AI?

"AI is allowing us to be more productive and strategic with the use of our time and resources" - Amazon Employee.



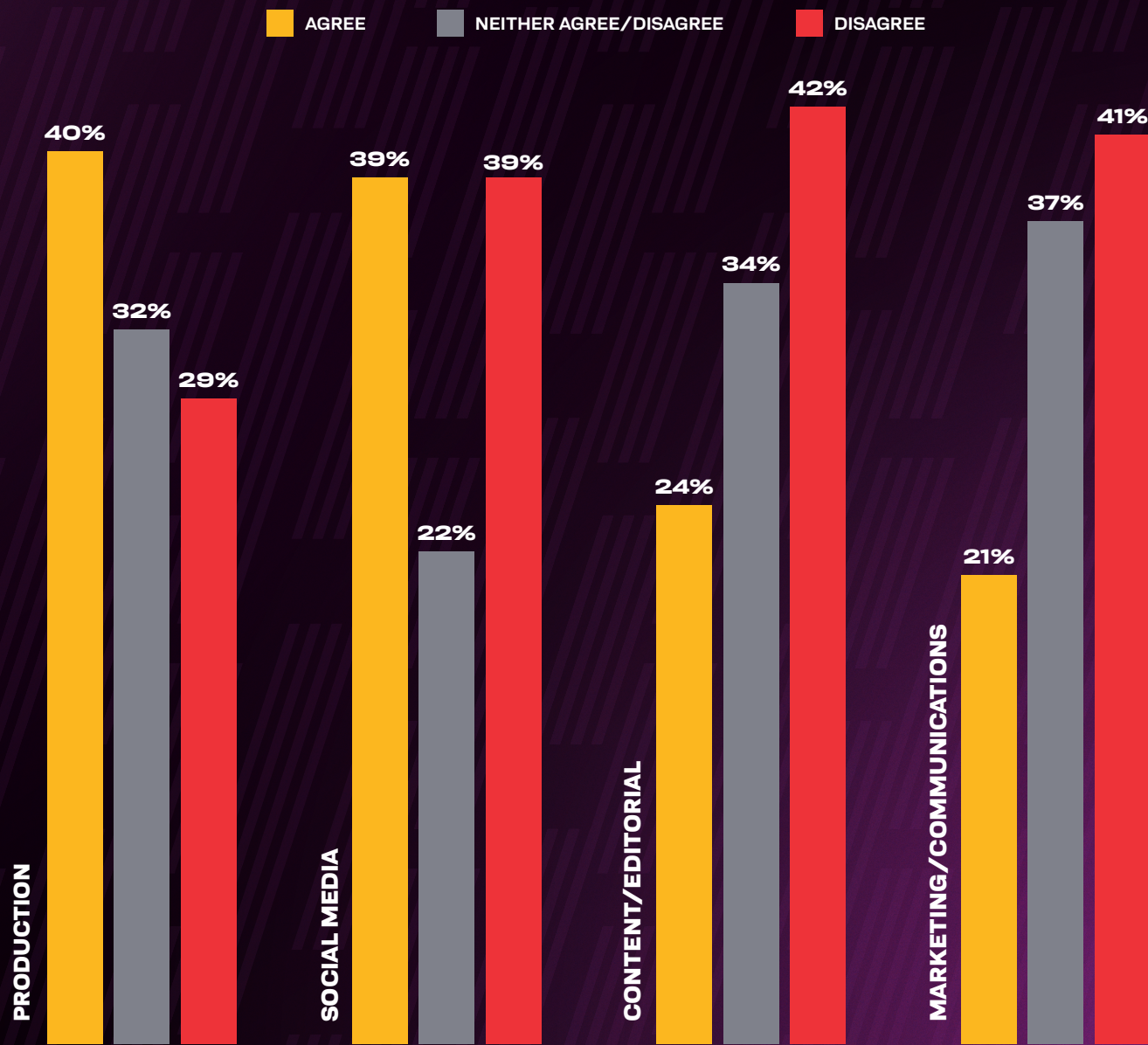
Social media and production workers are utilising AI for audience commercialisation most effectively

The sector-by-sector variances from the previous page may be partially explained when the survey's responses on the impact of AI so far are split into specific job roles.

Those who work in production and social media appear to be leading the way in seeing the benefits, with 40% and 39% agreeing that AI has helped to commercialise their audience already.

Their colleagues in other departments report a lower number - only 24% in content and editorial and 21% in marketing and communications positions agreed AI is already powering commercialisation for them.

DO YOU AGREE/DISAGREE THAT AI HAS HELPED YOUR DEPARTMENT TO COMMERCIALISE YOUR AUDIENCE?



What makes you most excited about the use of AI?

"Expanding the opportunity to monetise our content" - DAZN Employee.



C-Suites bullish about AI integration and benefits

Senior executives and those in product positions were the most confident that AI will grow their audiences, with 67% and 58% of them respectively expecting such a development in the next year.

The strongest advocates among C-Suite respondents for AI integration were in the stadium and OOH (71%), digital media and apps (62%) and betting operator (61%) categories.

Enormous optimism about AI but still uncertainty about exactly how to adopt it

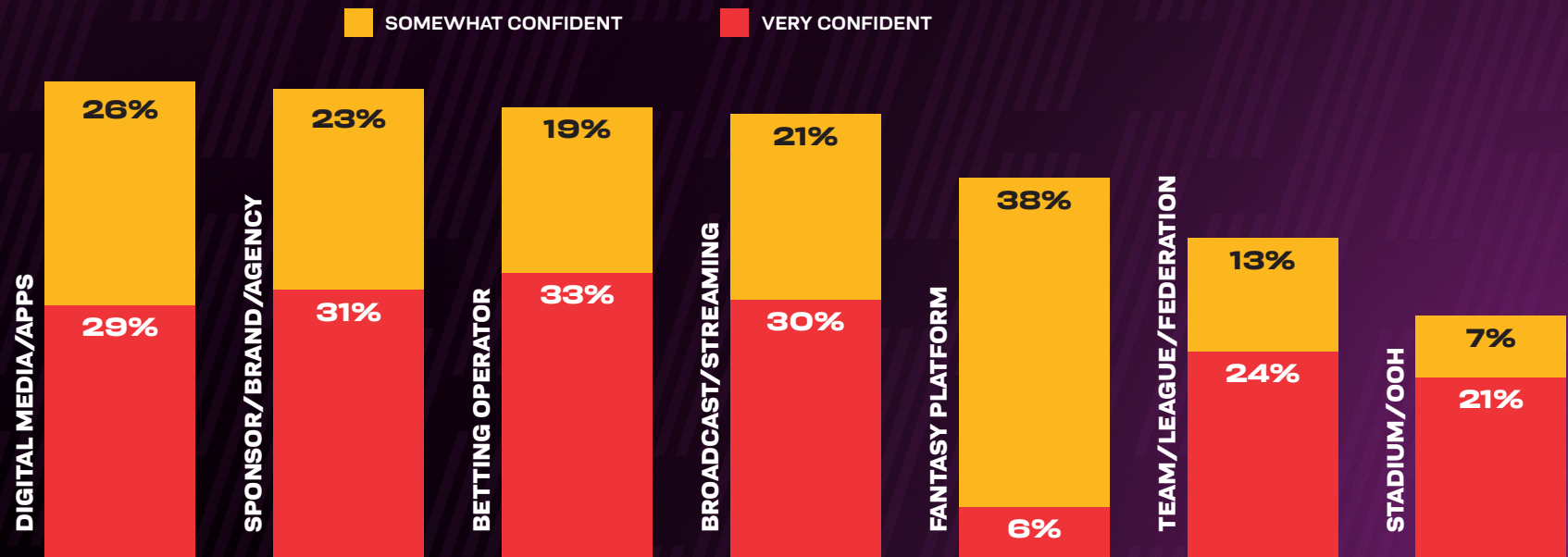
Despite the enthusiasm from the boardroom and optimism about AI's impact on revenues and audiences, only one in five respondents stated they are very confident about incorporating AI into their own work so far, while less than half (47%) expressed confidence overall.

Those in the stadium and OOH category report the biggest challenge in meeting AI-driven expectations. While 71% are being encouraged by leadership to adopt AI, only 29% of stadium and OOH respondents said that they are confident about how to integrate AI into their work.

TO WHAT EXTENT ARE SPORTS INDUSTRY PROFESSIONALS CONFIDENT ABOUT INCORPORATING AI INTO THEIR WORK? (%)

What makes you most excited about the use of AI?

"The potential of changing the industry" - NBA Employee





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**AI: 2025
and beyond**

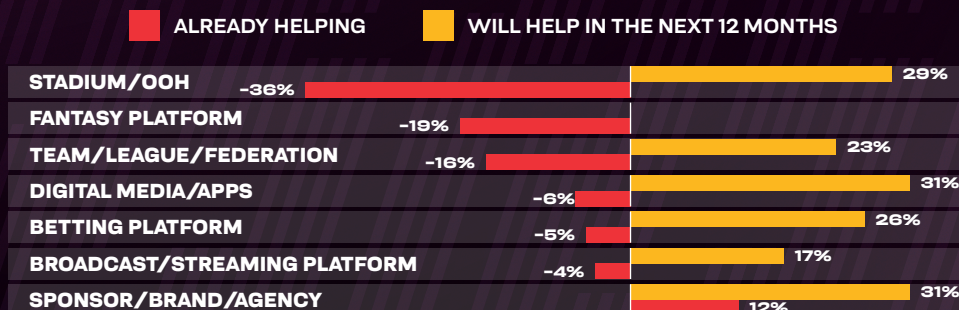
Every sector expects a much bigger impact from AI in 2025

If the perspectives outlined by the survey's respondents materialise, the sports industry is on the cusp of an AI revolution in 2025 that will supercharge growth across multiple sectors.

Whereas until now there has been a general viewpoint that AI has not yet helped to commercialise audiences, the outlook for the next 12 months is markedly different.

Every sector expects a much greater impact from AI in the coming year, with an average positive shift of 33% from disagreeing towards agreeing that the technology will help to monetise end users. The positive shifts range from 19% for sponsors, brands and agencies, as well as fantasy platforms, up to a huge swing of 65% for stadium and OOH respondents.

AI'S ROLE IN COMMERCIALISING YOUR AUDIENCE SO FAR/IN THE NEXT 12 MONTHS (%)



Respondents answered:

a) To what extent do you agree: AI is already helping my department commercialise my audience?

b) To what extent do you agree: AI will help my department commercialise my audience in the next 12 months?

Figures were calculated by deducting % who disagreed from % who agreed.

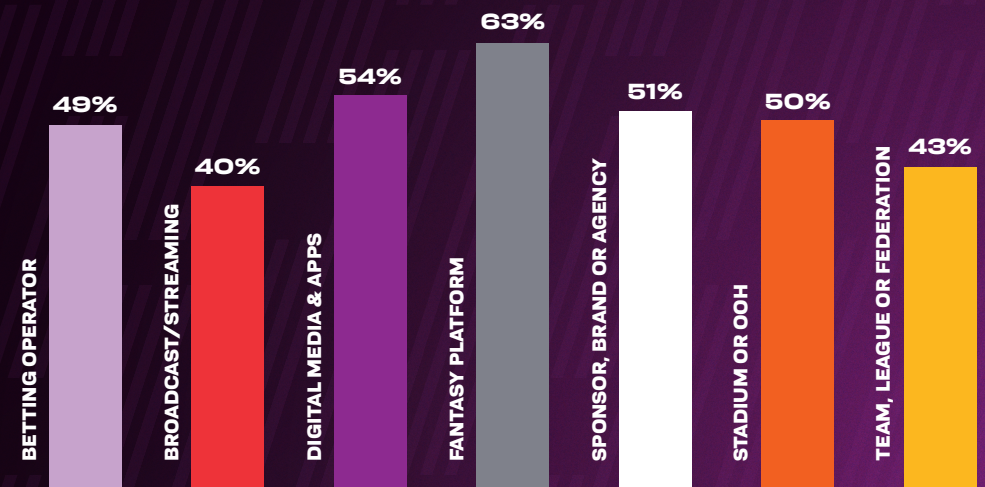
All sports media sectors expect AI to help grow audiences next year

Crucially, there are lofty expectations across all sectors that AI will help departments to increase their audiences, and not just monetise them. For example, 54% of those working for digital media and apps anticipate such growth in the next year.

TO WHAT EXTENT DO SPORTS INDUSTRY PROFESSIONALS AGREE THAT AI WILL GROW AUDIENCES IN THE NEXT 12 MONTHS? (%)



% WHO AGREE SOMEWHAT OR STRONGLY THAT AI WILL HELP GROW THEIR AUDIENCE IN THE NEXT 12 MONTHS - BY SECTOR



Are North American broadcasters, teams, leagues and federations lagging behind their global counterparts in seeing AI benefits on audience and revenues?

The results of the survey also produced key insights into regional nuances regarding AI, and the perspectives provided by broadcast and streaming platform representatives who focus on North America highlight the headroom for the growth of AI in the market.

By way of example, whilst broadcast and streaming platforms with a focus on LATAM and EMEA in general agree that AI is already helping to grow their audience, and the split in APAC is marginal, those who focus on North America are far more likely to disagree it has already made an impact on viewer growth.

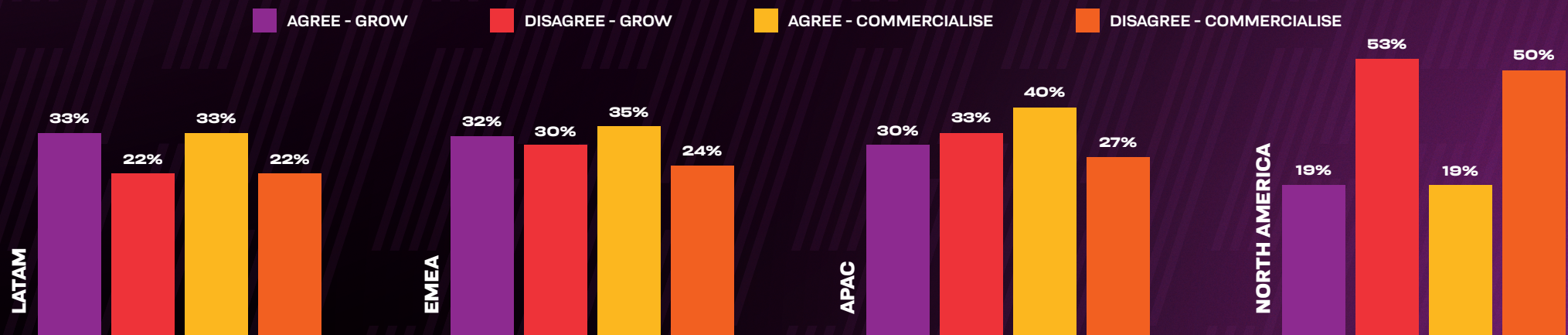
Similarly, those broadcasters with a focus on North America disagree by a clear margin that AI is helping to commercialise their audience, in a clear contrast to those focusing on the other three regions.

At the same time, teams, leagues and federations with a focus on North America compared to the three other regions were significantly more likely to say that AI had not yet helped to grow revenues (50% versus 39%) or audiences (average of 27% versus 19%).

More optimistically, across the board, 47% of all respondents with a focus on North America said that they expect AI to grow their audience in the next 12 months versus 20% who disagreed, while 45% said that AI would help them to commercialise their audience versus 22% who disagreed.

Additionally, representatives of the digital media and apps sector with a North American focus are the most positive with regards to AI, with 51% agreeing it is already having an impact versus 31% who disagree.

% OF BROADCAST AND STREAMING PLATFORMS WITH DIFFERENT REGIONS OF FOCUS WHO AGREE/DISAGREE THAT AI IS HELPING TO GROW/COMMERCIALISE THEIR AUDIENCE



AI expected to be useful across the board, especially in automating content and doing more in less time

In terms of where exactly AI will be impactful, there are expectations that the technology will accelerate opportunities across various day-to-day operations, according to those who expect it to have a positive impact. The most frequently cited benefit of AI by those respondents was the opportunity to automate content (67%) followed by reporting analysis (60%) and personalising experiences (39%).

The potential future impact of AI on content appears to be particularly significant. Sports industry professionals who believe that AI will grow either their audience or commercial opportunities are more bullish about the impact on automating content (67% versus 60% of all respondents) and identifying new stories (30% versus 23% of all respondents).

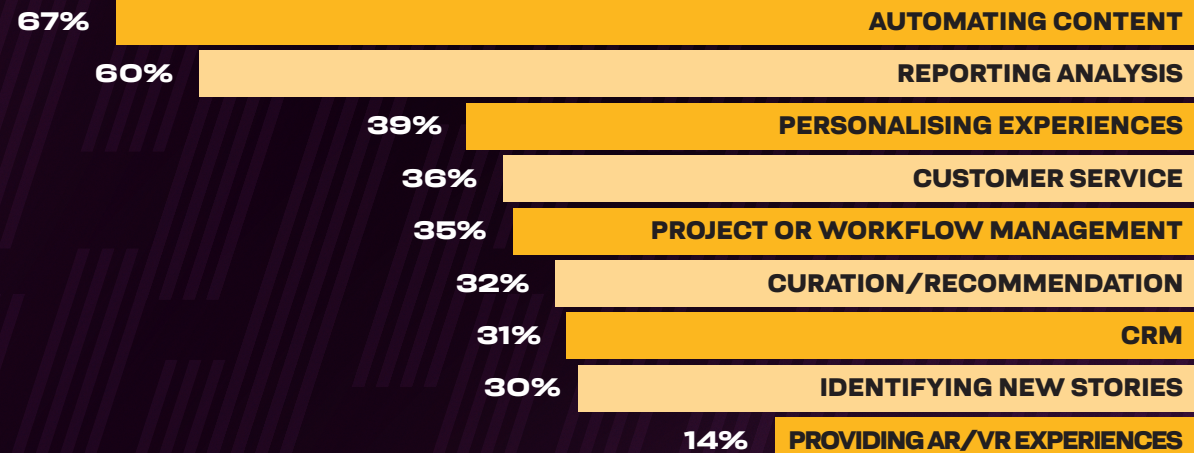
Additionally, there is broad confidence that the technology will bring about positive day-to-day changes – and not just among those who are optimistic about the impact of AI. Even a majority of those who are less enthusiastic about AI acknowledge that the technology will allow them to do more in less time.

What makes you most excited about the use of AI?

"The ability to customise content for individuals" – T-Mobile Employee

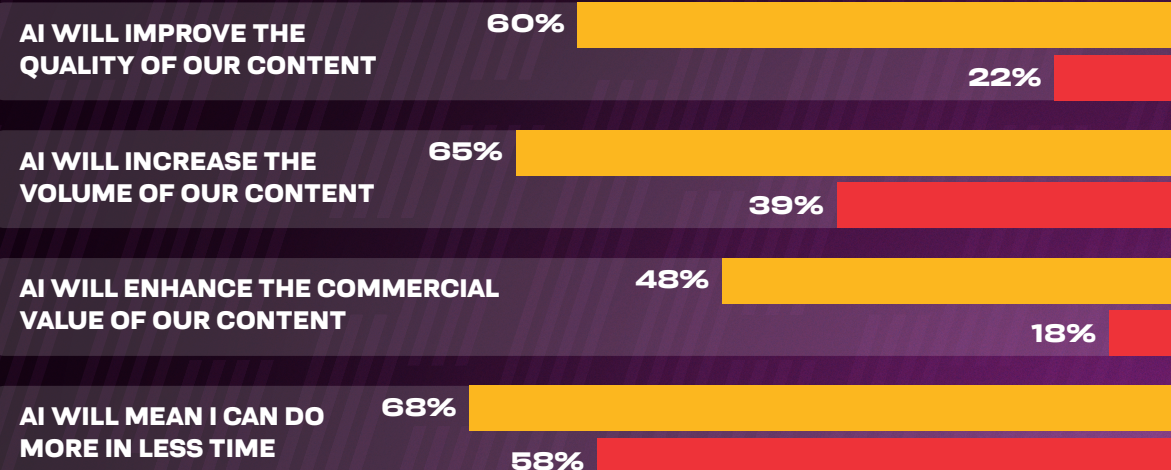
T-Mobile™

EXPECTED BENEFITS OF AI THAT GROWS AUDIENCE/ COMMERCIAL OPPORTUNITIES (%)



WHAT IMPACT WILL AI HAVE ON MY WORK? (% AGREE)

AI BELIEVERS AI SCEPTICS





Sports Content Monetisation

From the emergence of immersive technologies to the unprecedented array of stats-driven insights and graphics designed to extend and deepen fan understanding and enjoyment, the focus on enhancing sports content, storytelling and accessibility is sharper than ever.

As a result, fan-facing entities are equipping themselves with a range of tools to enrich the end user's experience, with the goal of attracting and retaining attention, and optimising relevance.

However, are they also adopting methods of turning fan engagement into revenues?

Monetisation is getting harder, but not in every sector

Our survey’s respondents were more likely to say that monetising content has been getting harder rather than easier in 2024. Only those in the team, league and federation category said that commercialising content (36%) had become easier rather than harder (28%) – a net positive of 8%.

Interestingly, of the broadcast and streaming platforms that reported difficulties with commercialising content, the task was not quite as severe in EMEA (38%) as in North America (47%), LATAM and APAC (both 50%).

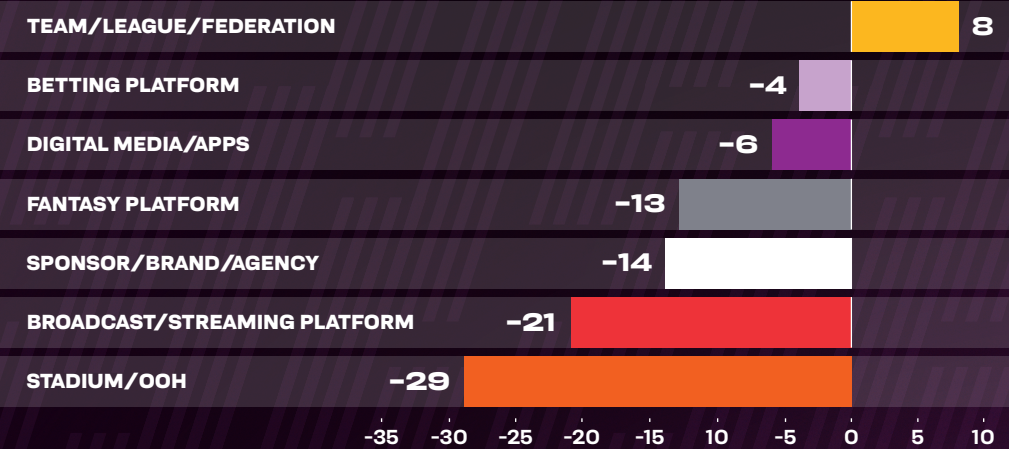
Across the board, aside from the team, league and federation category, just 27% of those surveyed said that commercialising content is getting easier.

So what are teams, leagues and federations doing that other sectors are not? One answer could be that they are taking note of other research published recently, saying 77% of fans have multitasked while watching sports at home, with the most popular activity for every demographic, especially Gen Z, being looking up team and player stats. [1]

This shows there are growing opportunities to fuel fandom through data-driven narratives around sport, and where there are increased eyeballs and attention, there are monetisation opportunities, like those identified by FC Barcelona.

Increasingly, it is recognised that game data can power emotions by fostering understanding, empathy and connection to the on-field action.

IS COMMERCIALISING CONTENT GETTING HARDER (-) OR EASIER (+)?



Note: Cumulative percentage difference calculated by subtracting % of individuals who said ‘harder’ from % who said ‘easier’.

Building better sponsorship opportunities

How do you create more authentic sponsorships?

During the 2024/25 season FC Barcelona has been using Opta Graphics to connect first-time sponsors in three unique sponsor categories: banking, tool-making and rapid delivery, to their player’s performances during and after games.

Connecting data to your sponsors in this way means it ticks the authenticity box, and that’s why the fan reactions and engagements for FC Barcelona since starting these new collaborations have been so successful. From the start of the 24/25 season, they are at over 2 million engagements and counting.



Cross-function collaboration is key for content commercialisation

While departmental silos have long been blamed for stifling productivity and growth, according to the survey, nearly three-quarters (71%) of respondents said that their commercial team communicates with their content executives on a daily or weekly basis, led by the sponsor, brand and agency category (80%).

In fact, the results of the survey show a direct link between cross-departmental collaboration and successful commercialisation.

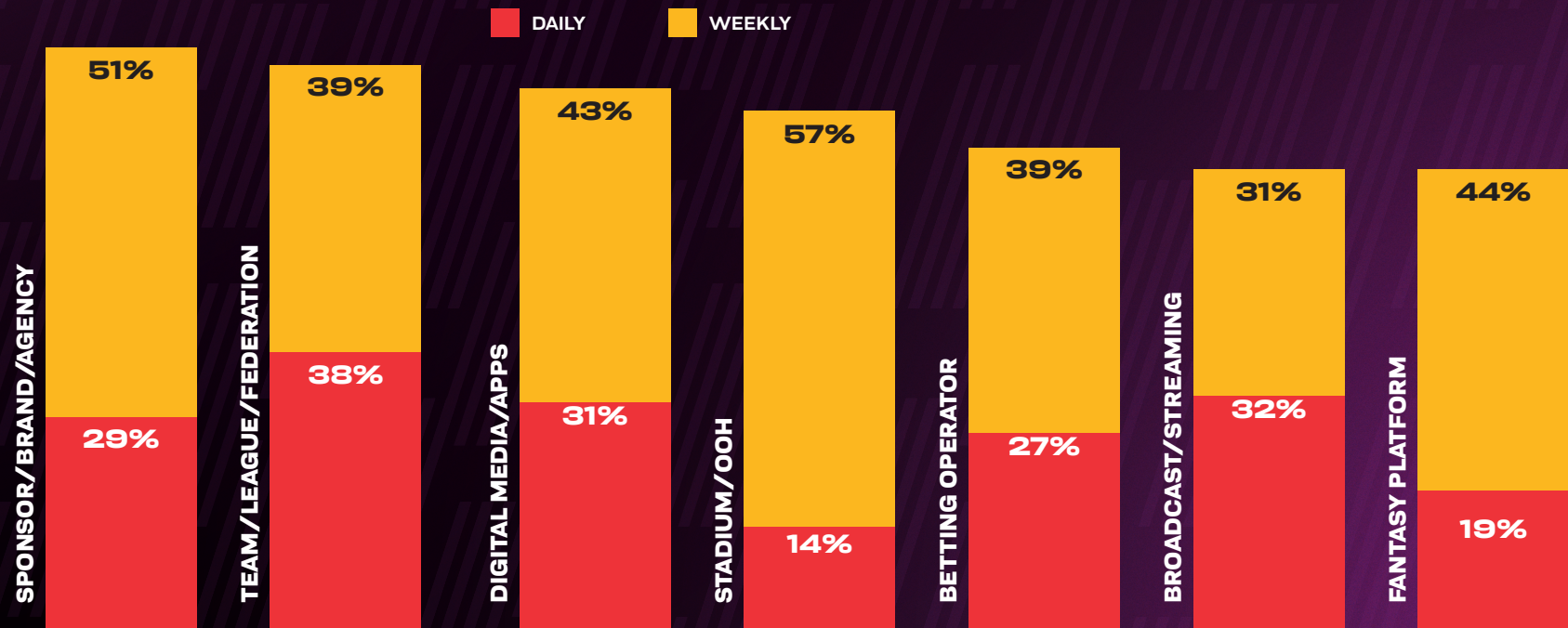
More than one in three execs (34%) who stated that their commercial departments communicate very frequently with their content and

media team claimed that it had become easier to commercialise content.

This dropped to one in four respondents (25%) who described such internal collaboration as infrequent.

This is potentially reinforced by the sector with the least frequent daily collaborations between content and commercial also being the sector reporting the biggest challenge in commercialising content in the chart displayed on page 16: those working with stadiums and out of home screens.

% OF RESPONDENTS WHO SAID THEIR COMMERCIAL AND CONTENT TEAMS COMMUNICATED DAILY/WEEKLY



What makes you most excited about the use of AI?

"Scale!" – LiveScore Group Employee



Teams, Leagues and Federations look to new revenue streams for growth

There appear to be two additional reasons why teams, leagues and federations are finding it easier to commercialise their content than any other category.

Firstly, the growing importance of content-rich revenue streams for teams, leagues and federations confirms the narrative that such rights-holders are taking greater control and ownership of their content output.[2]

For instance, many have launched YouTube channels or OTT platforms to leverage the growth of streaming – and this would explain why subscriptions-based income, cited by 15% of such rights-holders as a key revenue source in 2024, is expected to grow in importance by 21% of the same respondents.

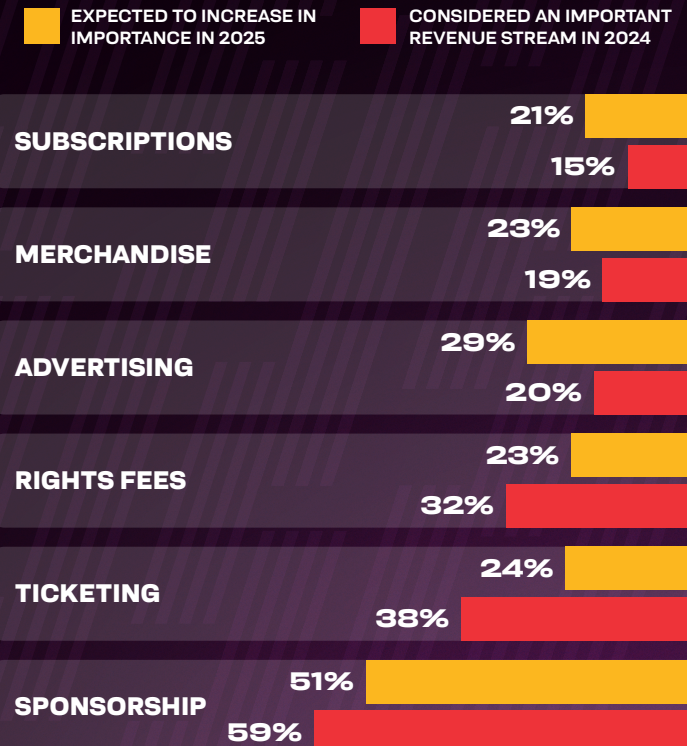
Secondly, these rights-holders are continuing to diversify their business models beyond traditional income streams. For example, whereas 38% of teams, leagues and federations highlighted ticketing as a main revenue stream in 2024, only 24% believe it will grow in importance from 2025 onwards.

Meanwhile, a stream that is more heavily influenced by content, such as advertising, is expected to grow in importance by 29% of the category's respondents, up from 20% who said that it was a primary source of revenue in 2024.

Another noteworthy finding among teams, leagues and federations was that only 23% of them expected rights fees to grow in importance in the coming year, in comparison with 32% who highlighted rights fees as a key revenue stream in 2024.

This shift may be a timing issue linked to the long term nature of many rights agreements, or may reflect a widely documented cooling in the broader media-rights space and be a further catalyst for rights-holders to further develop the fan experience and commercial inventory available through their own properties. [3]

IMPORTANCE OF REVENUE STREAMS FOR TEAMS, LEAGUES & FEDERATIONS (%)



What makes you most excited about the use of AI?

"The ability to automate simple tasks, allowing us to focus on more value add tasks that improve the performance of our content" – Chelsea FC Employee



Opta Stream's Game-Changing Impact: Driving Fan Engagement and Ad Revenue for Vodafone Germany at UEFA Euro 2024

Stats Perform launched two products in 2024 to help sports media organisations grow their sponsor and advertising revenues – Opta Stories and Opta Stream. Vodafone Germany achieved significant success with Opta Stream's dynamic live multimedia updates for every game, enhancing the experience for their match centre users during the UEFA Euro 2024 football tournament. Powered by AI, and available for thousands of basketball and football games globally, and with

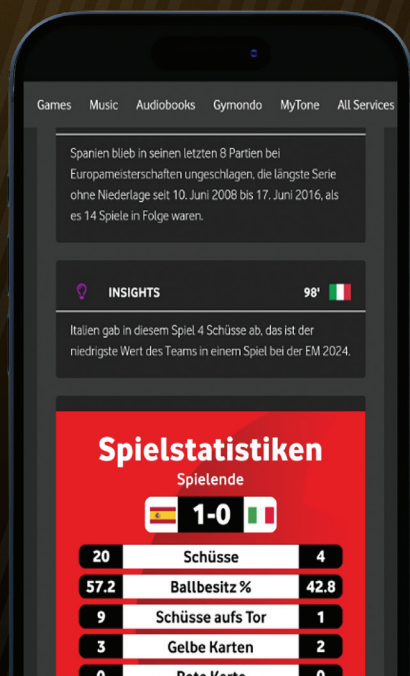
embedded ad tags for ad networks, Opta Stream delivered Vodafone-branded, automated statistical infographics at key moments during every game, including goal sequences and heatmaps, as well as rolling live text commentary, contextual stats and metrics – and achieved record levels of fan engagement.

To learn more about this case study:

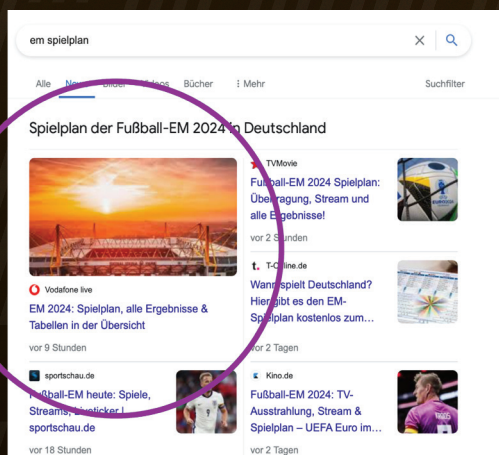
[visit.statsperform.com/vodafone-stream](https://www.statsperform.com/vodafone-stream) or **scan the QR.**



Opta Stream added to Vodafone Live

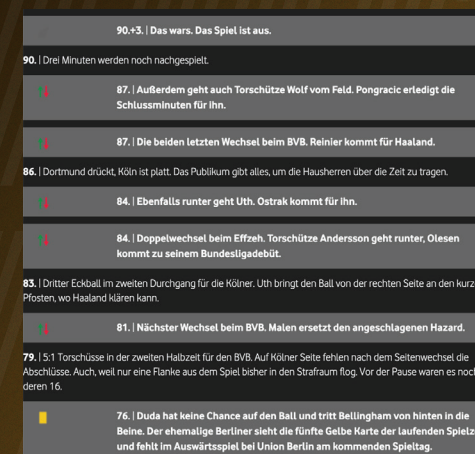


#1 on Google News



Google's crawlers instantly propelled it to number one on Google News

Enormous user growth



Vodafone Live got more users in week 1 of Opta Stream than in 6 months with their former service

Owned websites and apps best for generating revenues, third party platforms lagging behind

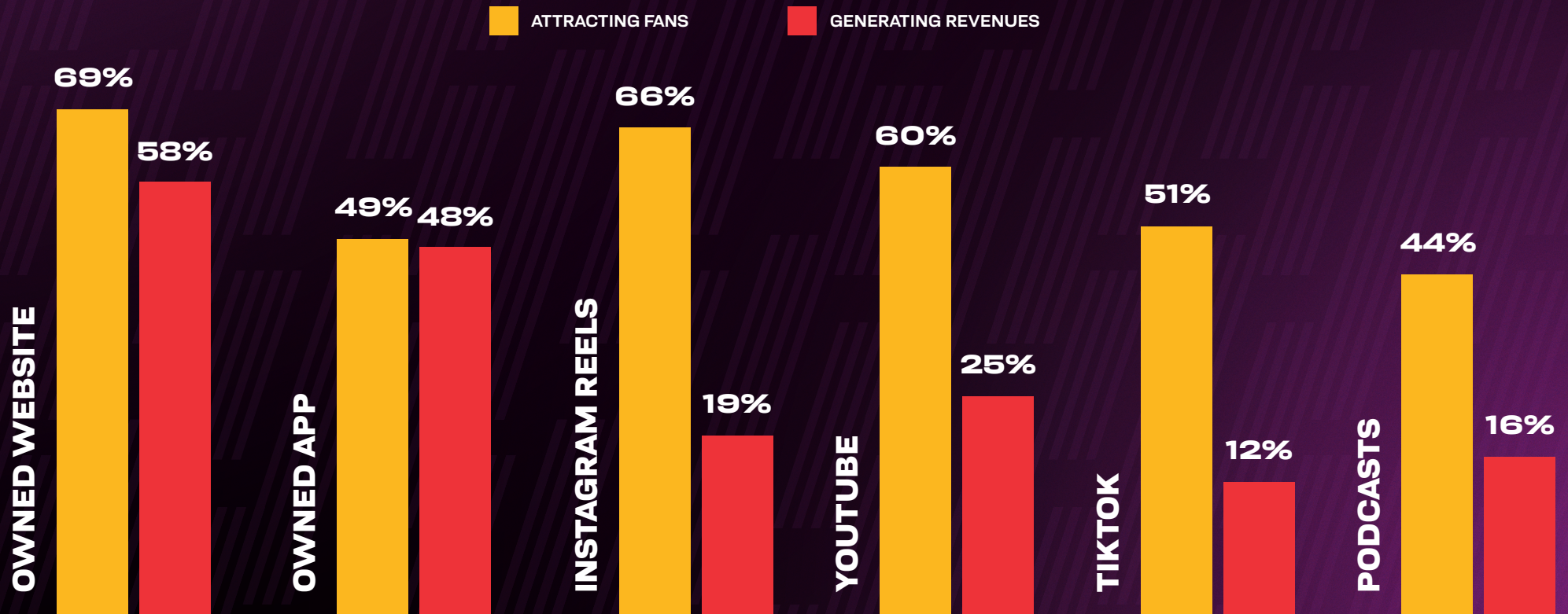
Owned websites and apps – through which first and zero-party data can be leveraged more easily to personalise experiences – are over twice as effective in terms of generating revenue than social media activity and podcasts, according to the survey.

The survey revealed some interesting comparisons between sectors when it comes to the most important channels for attracting fans and generating revenues.

For example, despite teams, leagues and federations being the most bullish about it getting easier to commercialise their content (page 17), only 51% and 41% of them are generating revenues from their owned websites and apps respectively: under the wider sports media industry average.

However, there are signs that this is set to change. For example, the increasing importance of subscriptions for teams, leagues and federations as seen on page 18.

WHICH GOALS DO THESE CHANNELS HELP TO ACHIEVE? (%)



APAC and North America missing out on revenue opportunities?

It should also be noted that across all respondents in our survey, regional variations in content strategies were highlighted through the use of owned platforms, as well as social channels.

For instance, respondents with a focus on APAC were more likely than other regions to say that their owned platforms are primarily used to increase audiences, but were also much less likely to say that their owned websites are used to generate revenue.

There may also be untapped revenue potential for respondents with owned apps that focus on the North American market. Whilst it's the strongest region for generating revenue from owned websites, fewer than half of the North American-focused execs say that their apps are used to generate income – slightly under the other three regions.

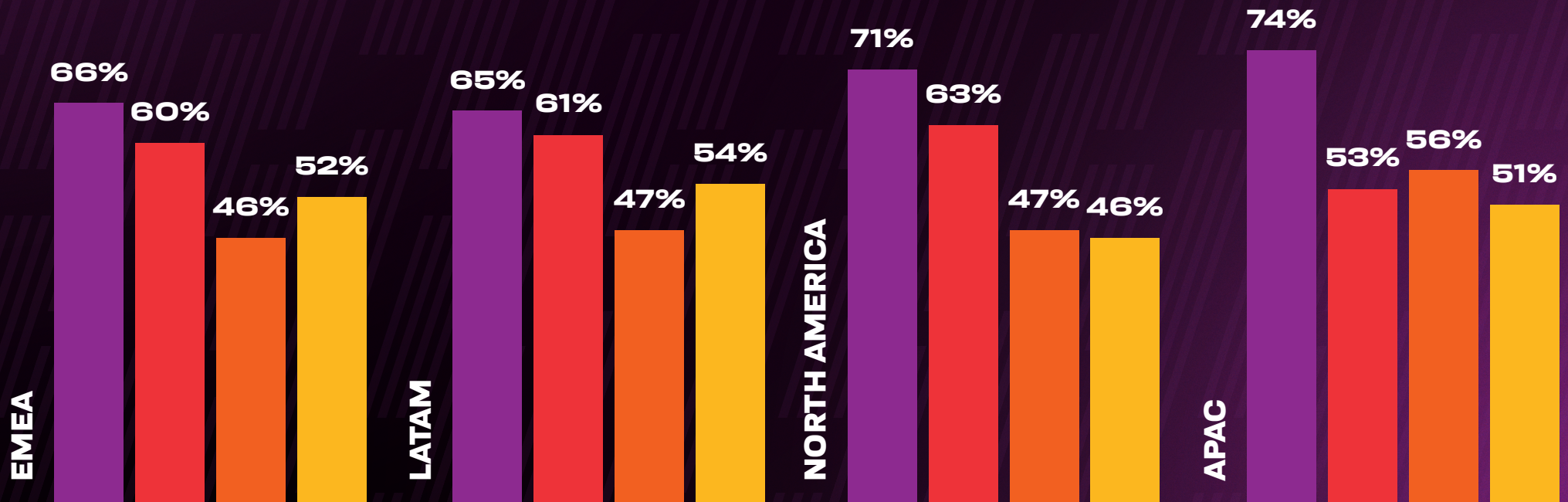
% WHO SAID OWNED PLATFORMS ARE USED PRIMARILY TO INCREASE AUDIENCE / GENERATE REVENUE

OWNED WEBSITE - AUDIENCE

OWNED WEBSITE - REVENUE

OWNED APP - AUDIENCE

OWNED APP - REVENUE



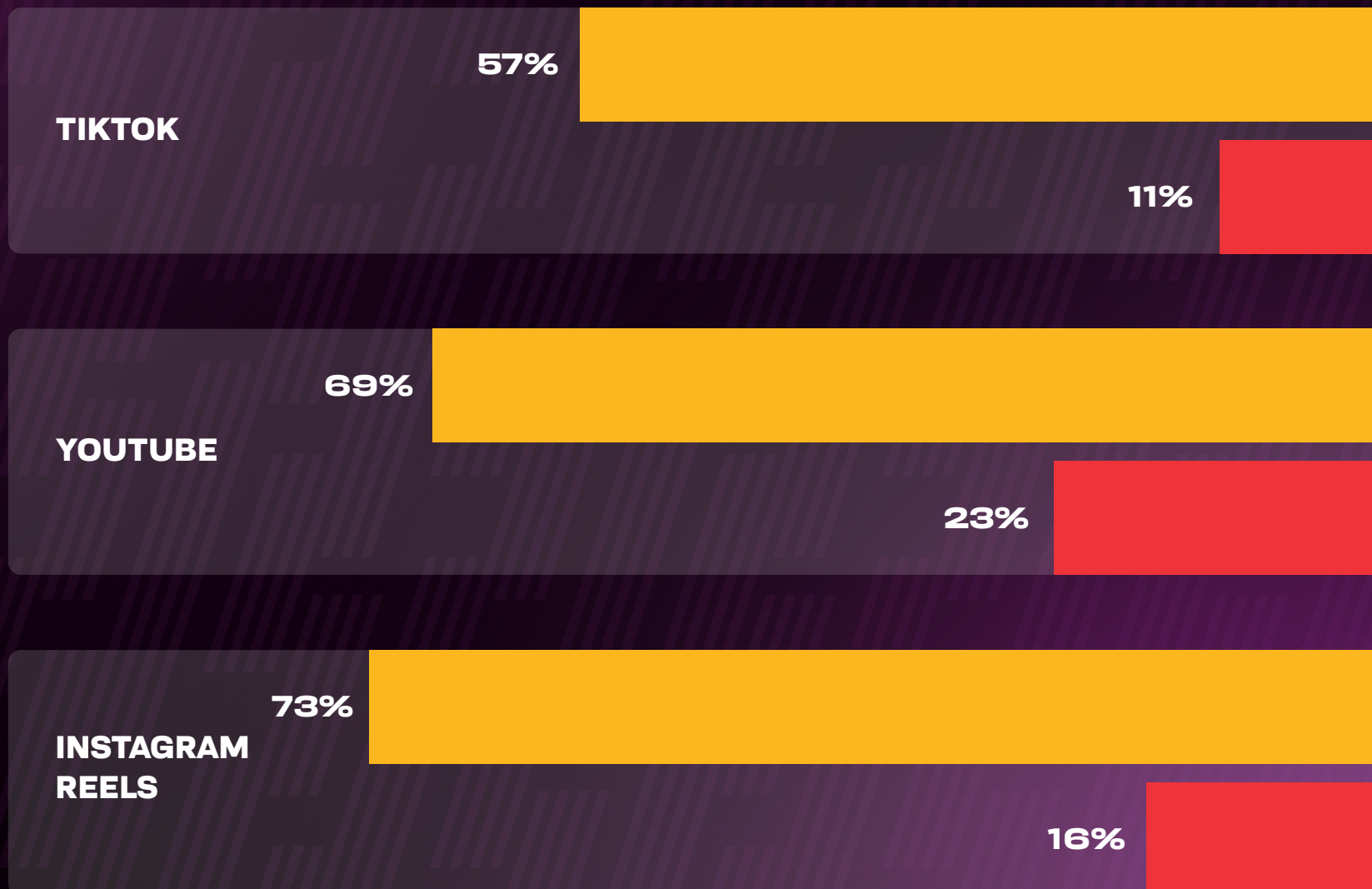
YouTube the king for revenue generation on social, but Instagram Reels the most-used channel

When it comes to social media platforms, whilst they are effective in attracting audiences, generating revenue from them currently appears to be a different matter for the sports media industry as a whole – with interesting variances by sector and region.

A clear majority of the survey's respondents use Instagram Reels (73%), YouTube (69%) and TikTok (57%), but generally their potential to drive income via such platforms is modest in comparison with owned platforms, where first-party data is easier to harvest and analyse, and where sponsors perhaps see greater brand value.

% USING SOCIAL PLATFORMS TO GENERATE REVENUE

USING PLATFORM USING PLATFORM TO GENERATE REVENUE



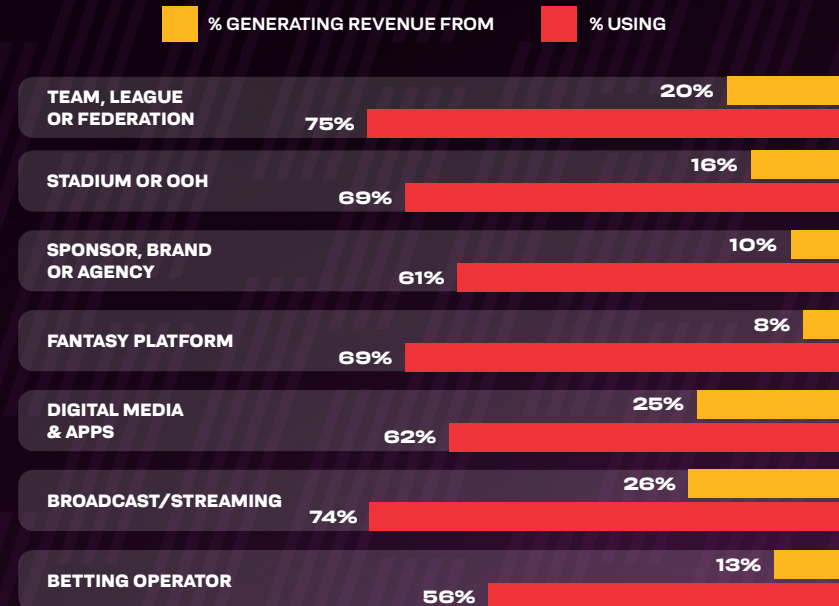
Broadcasters and streamers getting most value from social channels

The best-performing sectors at generating revenues from the social space are broadcast and streaming platforms, which peak with 41% generating income through YouTube; digital media and apps, of whom 32% drive revenue via Instagram Reels; and teams, leagues and federations, with 30% of them generating income via YouTube.

Teams, leagues and federations focused on the APAC region are generating more revenue from Instagram Reels (35%) and YouTube (40%) than their counterparts focused on the other three regions. However they are lagging behind (with North America) in Tik Tok revenue generation (15%).

Of the three social platforms covered in the survey, YouTube offered respondents the most conspicuous financial returns, tallying with the platform's positioning as a hub of long - and short-form sports content, and the new king of the lounge-room screen that is exploring new ways to offer media companies more monetisation options and a truer broadcast UX [4]. Despite the higher ROI from YouTube, Instagram Reels was cited as the most popular option for attracting audiences.

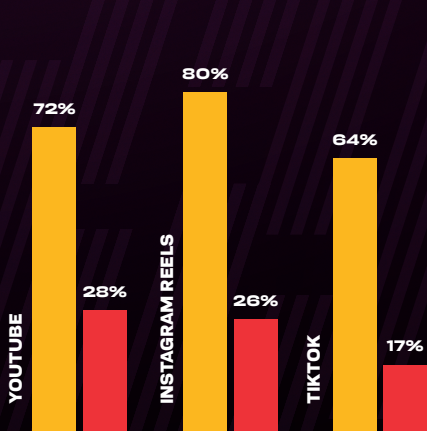
AVERAGE ACROSS INSTAGRAM REELS / TIKTOK / YOUTUBE - REVENUE GENERATION VS USAGE



TEAMS, LEAGUES AND FEDERATIONS - USAGE OF PLATFORMS TO GENERATE REVENUE (BY FOCUS REGION)

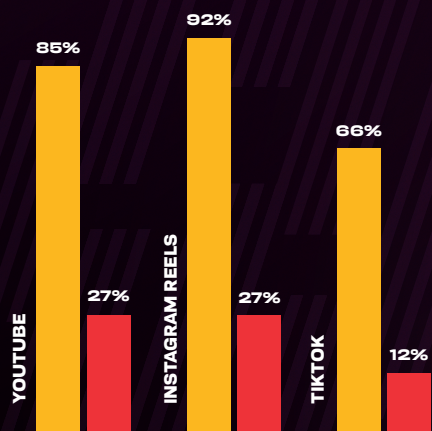
EMEA

■ USING PLATFORM ■ REVENUE GENERATION



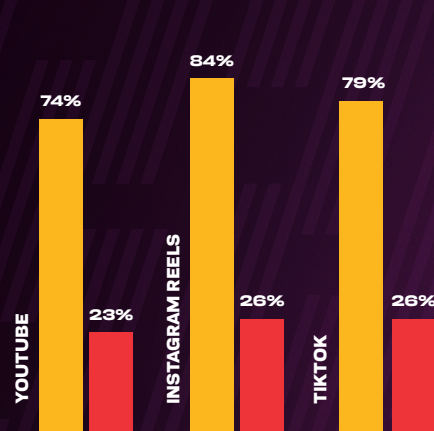
NORTH AMERICA

■ USING PLATFORM ■ REVENUE GENERATION



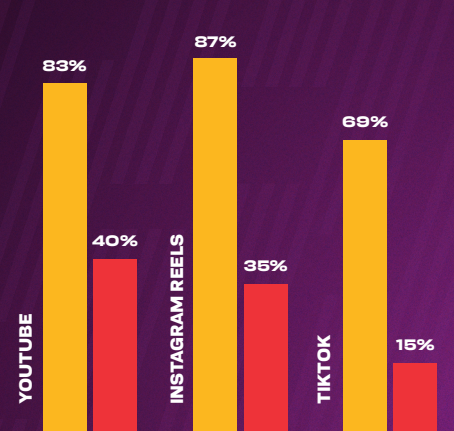
LATAM

■ USING PLATFORM ■ REVENUE GENERATION



APAC

■ USING PLATFORM ■ REVENUE GENERATION



Younger fans targeted for attention, not revenue – except in North America

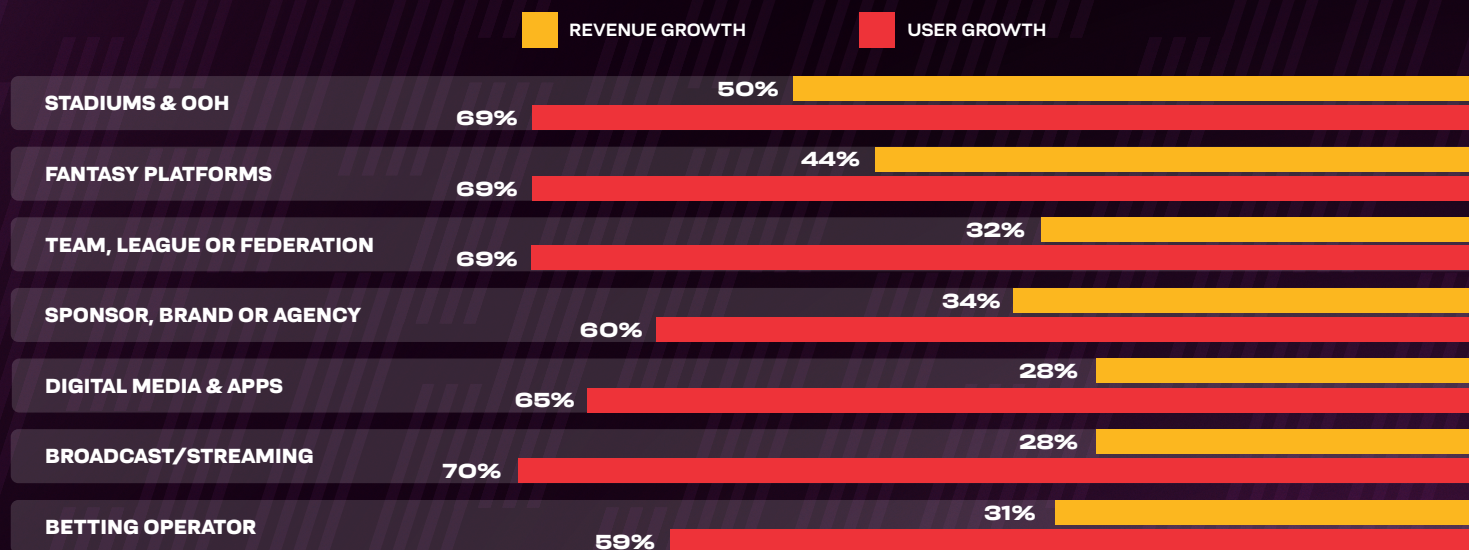
More than double the number of execs who are focusing on attracting a younger audience are doing so to drive user growth (63%) rather than revenue growth (31%).

Across all respondents, fan-facing entities focusing on the EMEA region are prioritising user growth among younger audiences (62%) far more than revenue growth (29%), a trend less pronounced in any other region. In comparison, entities targeting North America show a different approach, with 40% aiming to monetise younger fans more effectively.

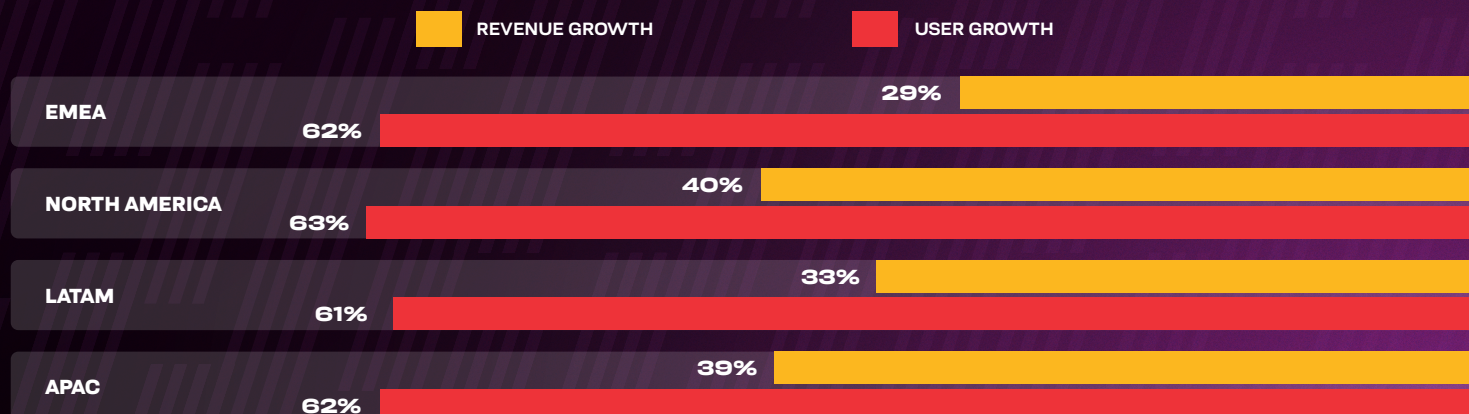
Attracting younger audiences is a priority across all the sectors we surveyed, but monetising this demographic is a stronger focus for some sectors than others.

For example, respondents from fantasy platforms (44%) and stadium and OOH organisations (50%) place a greater emphasis on revenue growth from younger audiences compared to other sectors.

YOUNGER AUDIENCE FOCUS ON USER GROWTH VS REVENUE GROWTH - BY SECTOR



IMPORTANCE OF AUDIENCE GROWTH VS REVENUE GROWTH FOR YOUNGER AUDIENCES



Not all sectors are focused on growing women fans

The sectors that were most focused on growing women audiences were stadiums and OOH (86%); teams, leagues and federations (70%); and broadcast and streaming platforms (67%) while it would appear that digital media and apps (54%) and betting operators (44%) are yet to see the same opportunity.

Focusing on betting operators, 44% of them said that they want to grow their number of women customers – whilst this is lowest amongst sectors in the survey, it is nearly the same proportion as for sponsors.

This may be a reflection of the findings in the 2023 Women's Sport & Betting Research report published by Stats Perform and WSG and supported by YouGov, which revealed that women's sports bettors are an increasingly engaged and active demographic, across all sports.

% FOCUSED ON GROWING WOMEN FANS

86%**STADIUM/OOH****56%****FANTASY PLATFORM****70%****TEAM/LEAGUE/FEDERATION****46%****SPONSOR/BRAND/AGENCY****54%****DIGITAL MEDIA/APP****67%****BROADCAST/STREAMING****44%****BETTING OPERATOR**

First-party data still a priority despite the postponed Cookiepocalypse

The overwhelming majority of respondents representing digital media and apps (79%), broadcast and streaming platforms (72%) and stadium and OOH (71%) said that it is still important to grow their registered and first-party user database in the next 12 months.

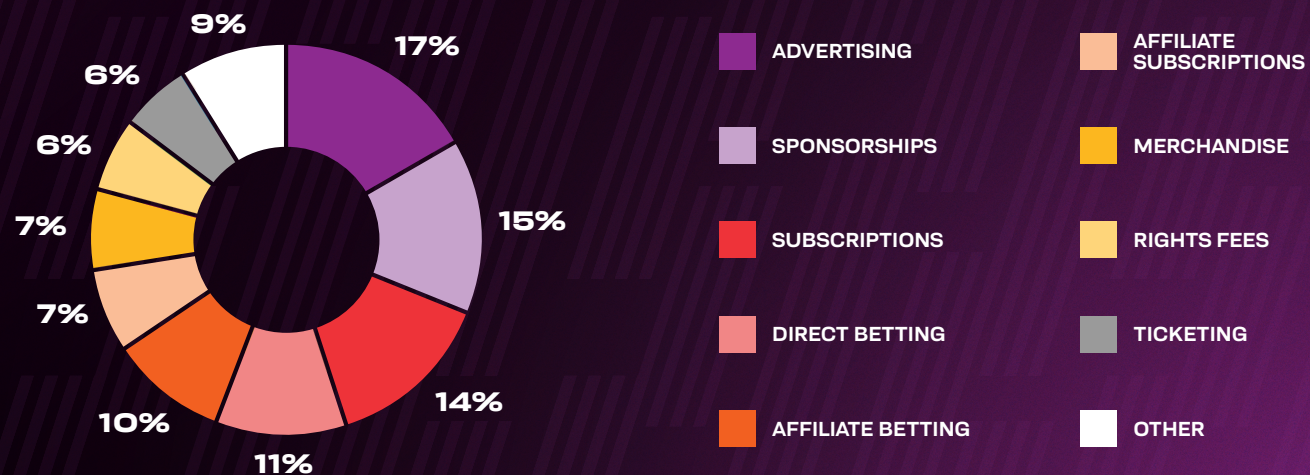
Whether respondents said that growing registered or first-party databases would be important or not, there was a consensus that such data would fuel numerous income streams beyond just advertising (17%) and sponsorship (15%) revenues, seeing benefits in subscription (14%) revenues, affiliate revenues and more.

This perhaps reflects the growing importance of transactional revenues to sports media publishers. (5)

% WHO CONSIDER IT IMPORTANT TO GROW REGISTERED/ FIRST-PARTY USERS IN NEXT 12 MONTHS



WHERE IS FIRST-PARTY DATA PARTICULARLY IMPORTANT? (%)



Answered by respondents who had already said that growing registered and first-party database is important over the next 12 months.

Sponsors see revenue opportunities from women's sports but are other sectors ready?

Around half of sponsors, brands and agencies claimed they focus on generating revenue growth through women's sports – more than twice the proportion of digital media and apps that do the same.

Since digital media and apps might expect sponsors to represent a reasonable commercial opportunity, this variance is surprising and perhaps points to an untapped opportunity to grow coverage of and sponsorable inventory for women's sports.

Similarly, broadcasters, teams, leagues and federations generate significant revenues from sponsors, yet only 30% and 32% of those respectively say the primary reason for their focus on women's sports is revenue growth.

Yet the fact that sponsors see revenue growth of their own from focusing on women's sports suggests there will be opportunities for broadcasters, teams, leagues and federations to assist.

REVENUE GROWTH GIVEN AS REASON FOR FOCUSING ON WOMEN'S SPORTS (%)

49%**SPONSOR/BRAND/AGENCY****36%****STADIUM/OOH****33%****BETTING OPERATOR****32%****TEAM/LEAGUE/FEDERATION****30%****BROADCAST/STREAMING****23%****DIGITAL MEDIA/APP****19%****FANTASY PLATFORM**

Betting revenues expected to become more significant for publishers and broadcasters

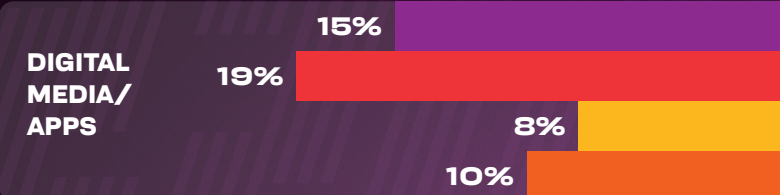
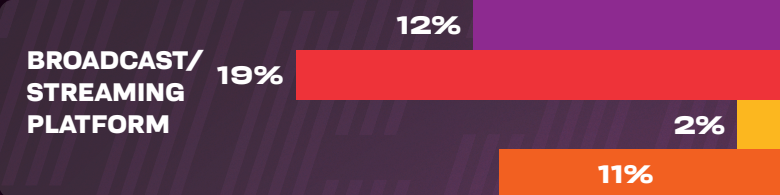
Around 20% of execs representing broadcast and streaming platforms, digital media and apps indicated that affiliate income streams from betting would become more important from 2025. This is a notable increase from 15% of executives representing digital media and apps, and 12% representing broadcast and streaming platforms who said that affiliate betting or fantasy gaming was already a main revenue source in 2024.

Teams, leagues and federations also see growth from betting revenues, albeit lower growth and from a smaller base – perhaps reflective of regional differences in regulation

and attitudes towards betting advertising in that sector.

It is also worth highlighting that the convergence of sports media and betting has led to odds, predictions and wagering-related insights becoming more commonplace in mainstream sports coverage, and becoming “content” in their own right. Such a strategic evolution is understandable because the human brain has been described as a prediction engine and fans love to quantify their speculation about results, whether they’re willing to risk money on their predictions or just use them as a basis for conversation.

MAIN REVENUE STREAMS IN 2024 & STREAMS THAT WILL GROW IN IMPORTANCE FROM 2025 (%)



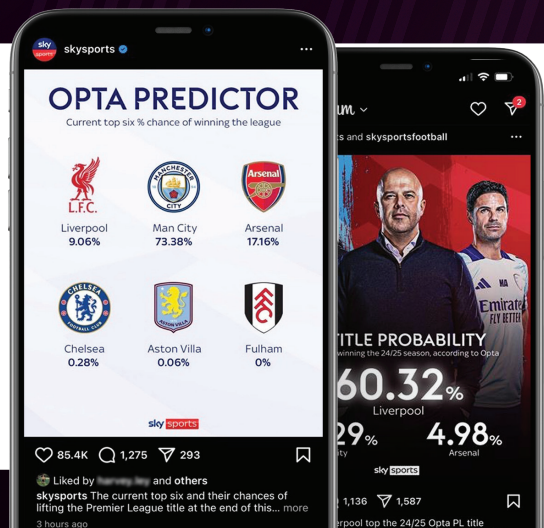
Note: Respondents were asked: a) Which of these would you consider to be your main revenue streams in 2024? b) In terms of revenue streams, will any of the following grow in importance to you from 2025 onwards?

sky sports

Opta Supercomputer

Predict the future to create more engagement opportunities.

Sky Sports use Opta AI-powered prediction data to spark fan debate on socials. The predictive content is great for pre-season and end of season predictions at both ends of the table, but can also be posted after key fixtures to showcase their wider impact on the league/competition. The constantly changing nature of the predictions means there’s always a new story to tell.





Conclusion

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Conclusion

Given that sports industry executives acknowledge that it is getting more difficult to monetise their audiences, it may seem counterproductive that many are yet to embrace innovative AI tools that could provide vital assistance.

There are understandable reasons for these two key findings from our survey. While individuals, and especially those in leadership or product roles, appreciate the potential of AI to drive revenues, it is easy to see why many who work in traditionally creative roles such as content and editorial are not immersed in bottom-line financial possibilities. Indeed, many of them do not see their roles as helping to drive revenues in the first place.

However, the opportunity to 'do more in less time' – the most common future benefit of AI that was highlighted by the survey's respondents – is applicable in content as well as product departments, from identifying narratives for storytelling to research-based tasks. Indeed, the impact of AI can be felt across a range of day-to-day business operations, helping to save time and, ultimately, make money, if the correct tools can be applied.



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On the cusp of change

Those who have already adopted AI are three times as likely to find it easier to commercialise their content than those who have not invested in the technology yet.

With this in mind, while the impact of AI on the industry appears to be modest so far, many are clearly on the verge of embracing it in the future.

Whereas the question of whether AI had helped to commercialise audiences so far drew a net negative response from all but one of the eight sectors surveyed, the question of whether AI will help in the next 12 months led to a huge swing towards net positivity.

Part of the reason for this is the growing body of evidence that shows the positive impact of AI in commercialising audiences, as demonstrated by the respondents' answers.

Many departments are simply yet to fully experience the power of AI. From teams, leagues and federations that have a focus on North America to entities that strive for revenues through owned websites and apps, there is an opportunity to integrate tools that can drive greater engagement and monetisation.

Likewise, the survey identified significant untapped opportunities to commercialise younger audiences, international audiences, and women's sports, while many anticipate the growing influence of sports betting to generate additional direct and indirect revenues in the future.

Consensus and collaboration

However, such content monetisation strategies, underpinned by AI, often require a broader, organisation-wide shift in thinking. After all, across all industries, a lack of consensus on AI within enterprises has been cited as a primary reason for sluggish adoption.

This can be addressed through internal communication, education, transparency and collaboration – and the survey indicated that the more frequently commercial and content teams can work together, the better the possible monetisation opportunities. Indeed, this is particularly important in areas where AI can open up creative time for more bespoke work that can grow audiences and increase the value and variety of monetisation options.

It would appear to be critical that content, product and commercial teams collaborate more closely than ever if they are to access the full benefits of the new technology. Some have already embarked on the necessary transition away from a 'wait-and-see' attitude and towards a proactive AI strategy.

However, it is clear from the survey's results that for many businesses and organisations at the heart of the sports industry, this change cannot happen soon enough. Fan engagement and monetisation trends are evolving – and many have only just scratched the surface in terms of their capabilities.

We hope you found some useful insights in the survey and a warm thank you to everyone who shared their views. Attract more fans and grow revenues, please reach out to us via marketing@statsperform.com.



Alex Rice

Chief Commercial Officer



Steve Xeller

Chief Revenue Officer



Dr. Patrick Lucey

Chief Scientist

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References and Acknowledgements

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Acknowledgements

When we set about asking execs from across the sports media industry to participate in our 2025 Fan Engagement, Content Monetisation and AI Trends survey,

I don't think we expected the enormous response. A huge thank you to everyone that participated. It's perhaps evidence that those in the industry recognise we're at a time of great change and opportunity. As such we're delighted to be able to bring so many useful insights to the clients, partners and sectors we work with across the world.

Thanks also to **Ben Jermy, Andy Cooper, Ruben Diaz, Alex Roberts, Mike Morrison, Gavin Perez and Rory Squires** for their work collecting, analysing, and presenting the findings so clearly.

I'm delighted that the report reveals the profound impact AI is already having on how we connect with fans, create content, and drive value in our industry, and how it is set to do so at even greater scale.

Early adopters seem to be reaping rewards, finding it easier to commercialise content and engage audiences at scale. AI's ability to automate tasks and uncover richer narratives is empowering sports media organisations to tell more captivating stories to entertain fans and delight sponsors, at scale,

at the right time, and across more platforms than ever.

The sports industry thrives on its ability to connect fans with the action, the teams and the athletes. Organisations are starting to see how AI helps them deepen context and enrich understanding for more fans and more types of fans, keeping sport more relevant than ever before.

At Stats Perform, we're driven by helping our clients grow their fans and revenues, to keep making sport mean more to more people around the world. And we're striving to help them be at the forefront of this AI technology revolution. Our services, including AI-powered tools like OptaAI Studio and Opta Stream, help them amplify their creativity, connect more meaningfully with more fans, and expand their commercial horizons.

We hope the findings in the survey help you to realise greater audience and monetisation opportunities, and think boldly about how AI can help accelerate or unlock further gains in these areas. The tools are here to help sports media entities thrive.

Simon Smith

SVP Marketing, Stats Perform



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