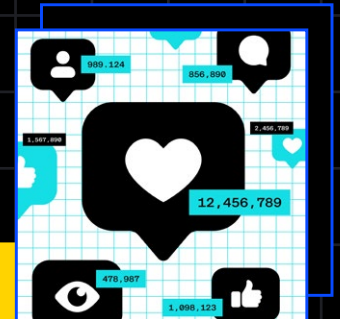
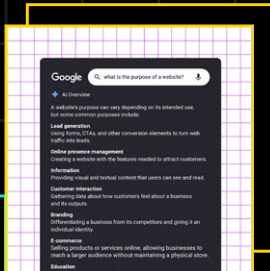


# Digital

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# 2025



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from Lewis Wiltshire

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# Introduction

Perhaps you remember when you first heard the phrase ‘second screen’ or maybe it’s been part of our industry for so long, it may as well have always existed.

It’s not a phrase we tend to question. Born from the potent combination of smartphones and social media which emerged in the 00s, we long ago accepted that TV was the first screen, the phone was the second screen, and sports would be what audiences do on both.

Is that still true?

One of the pleasures for me every year, when our team submits their entries for the IMG Digital Trends Report, is a ‘wow’ moment of realization that something our industry never questions is now ripe for unpicking.

Two of our Digital Trends for 2025 deal with the opportunities and threats we face from a rapid proliferation in the number of devices our audiences have.

One discusses ‘second screening’ while the other reflects on the sheer number of connected devices consumers now have, and what this means for new routes to audiences, as well as elevated risk of attention fragmentation.

Like last year, there are two trends that dig into artificial intelligence (AI) and its implications for the sports industry. Both of these could also be described as both opportunity and threat.

If you’re a sports industry executive reading this and becoming equal parts excited and terrified, great. This is the correct response.

We make predictions around new ways of thinking about direct-to-consumer (D2C), and digital measurement, and we suggest that revenue models will finally catch up with the explosion in short-form content.

We hope you enjoy the IMG Digital Trends report for 2025. As always there are seven (a nod to our origins as Seven League before we joined IMG in 2021). This is also its seventh annual edition – a nice milestone.

Feel free to share it, quote chunks of it, question elements of it, and most of all, get in touch about it. The IMG digital team is at your service – whether you are receiving this as a current client, or if you’re thinking about utilizing our expertise. We look forward to hearing from you.



A handwritten signature in black ink that reads "L. Wiltshire". The script is fluid and cursive.

**Lewis Wiltshire**  
SVP & Managing Director, Digital, IMG

# There is no 'second screen'

**Sports has to win on two screens at once**

By any measure, sports is more popular than ever.

Networks and streaming services are paying increasing fees for access to the world's best events, evidenced by recent bumper deals for the US Open and NBA, plus Netflix's plays for the NFL and WWE. The 2024 Super Bowl was the most-watched TV broadcast in the US since the moon landings. Nearly 24 million people in the UK watched England's Euro 2024 final defeat. The Olympic Games continued to inspire and demand attention. There is increasing demand for women's sports. Fans are also paying more every year to attend matches in person.

Yet, how often does the live game – either on the biggest screen in the room, or even for those inside the stadium – truly have our undivided attention? Two things can be true at the same time – nothing is more sought after by broadcasters than sports rights, but televisions are no longer anyone's primary viewing platform. Smartphones have that crown. Which one is the 'second screen' now?

Sports dominate the big screen, but our phones dominate our attention. The trend we will see in 2025 is for sports to abandon the notion of 'first screen' and 'second screen' and put more emphasis into winning the battle for both screens – at the same time.

**Trend 01**





# There is no 'second screen'

Sports has to win on two screens at once

In the embryonic days of social media, we used to refer to Twitter as sports' second screen.

It was a simpler time. Fans reached for their smartphones to react in the moment with a spontaneous text-based thought.

"WOW! LeBron!" Send Tweet!

Now, our devices are never out of reach, whatever the situation.

Picture yourself at home, watching sports. How often is your full attention on the action itself, and how long does this last?

Look around the room at your partner, children, or friends. How many are solely focusing on one activity? Many reading this will be visualizing similar scenes of divided consciousness.

Anecdotally, we know this to be true, and the data backs it up. There are nearly seven billion mobile network contracts worldwide.

Users pick up their phone nearly 60 times every day and spend approximately four hours online each day.

There is an increasing desire to feel connected at all times. Message, notification, reply, reaction.

WhatsApp has more than two billion global users. iMessage, WeChat, Messenger, Telegram and Snapchat have or are approaching one billion users each.

If we're not messaging, then we're likely watching a video of some kind.

A reported 93% of US teenagers use YouTube regularly. The four most-used apps among that demographic are all video-focused.

Nearly everyone owns a smartphone, but the youngest in society feel the most dependent on them. There is no sign of that trend reversing.

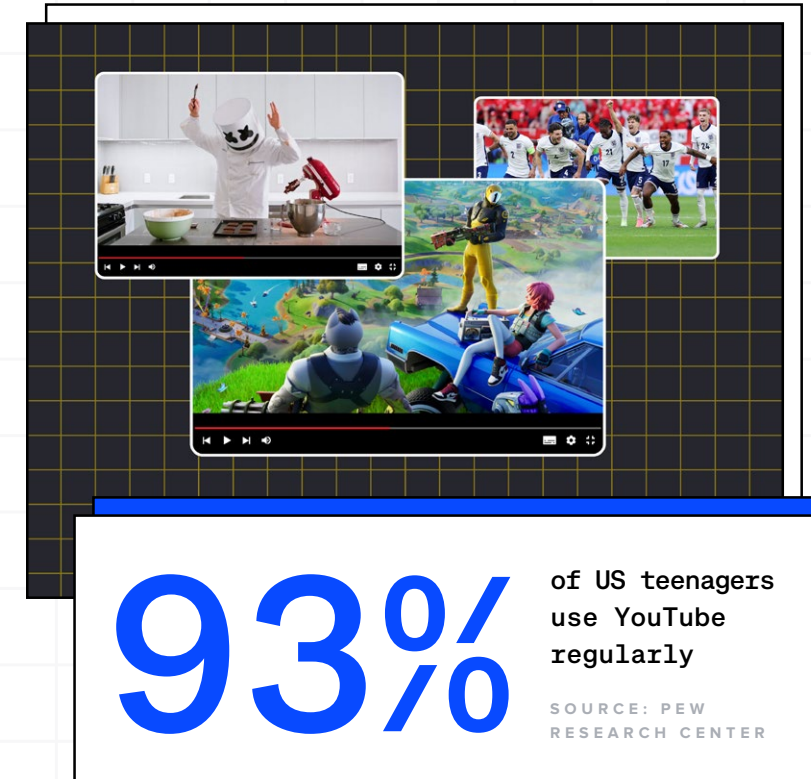
Meanwhile, the biggest arenas in the biggest sports have increased connectivity to the point where many fans are distracted by their phones even when they've paid a lot of money to be there in person. And even in the stadia where connectivity is still jammed on matchdays, you'll find fans using their phones to create and capture content.

So, whether a viewer is in attendance or watching remotely, the challenge becomes how do you facilitate fan engagement on multiple fronts concurrently? How do you create interactive experiences around what is taking place in front them and on the device they look to at least five times, on average, over a two-hour window?

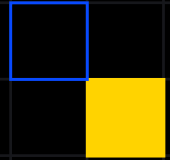
The sports industry knows it cannot fight against this audience trend. So in 2025 it will start to adapt to it – or it will lose ground to other forms of entertainment which do.

The primary job remains to make viewers aware of the live product and compel them to tune in.

An equally important task is convincing viewers to interact with or around the live event as it is happening on their primary device.



## Sports has to win on two screens at once



1

A 4x4 grid with a yellow square at (2,2), a blue square at (0,0), a blue square at (3,2), and a yellow square at (2,0). The grid is defined by a 5x5 grid of lines, with the squares being the cells between these lines.

All of these devices are designed to hook the viewer in the moment and provide them with extra incentive to keep watching and remain invested in the action. Creating multiple touchpoints to engage live viewers, relevant to various age and fandom demographics, is now non-negotiable.

## Sports has to win on two screens at once



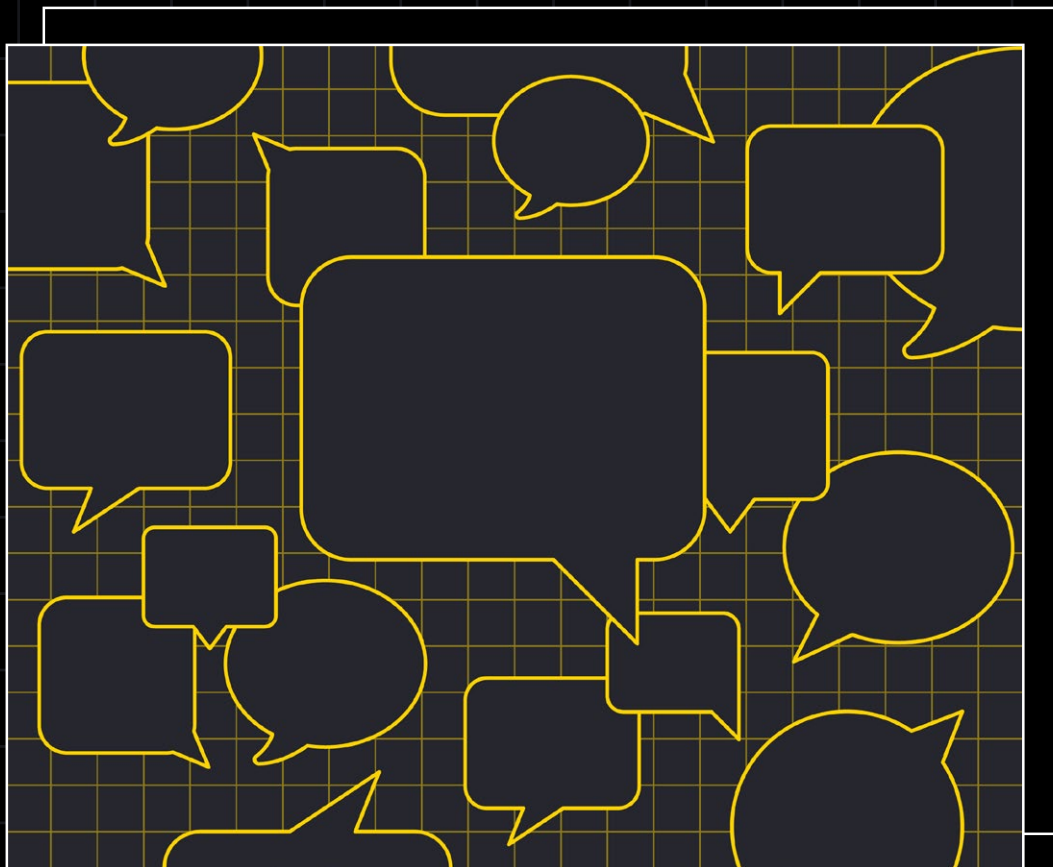
The mobile world is dominated by messaging, be that a 1:1 exchange, sprawling group chats, or engagement on specific interest-based communities such as those housed on Reddit and Discord.

Eye-catching or viral moments will always spark conversation. Sports cannot manufacture global talking points on-demand but must be more proactive than ever in pushing these moments to existing and desired audiences organically and via paid advertising as soon as they happen. Publishers must aspire to there being as small a gap as possible between the live moment and its community being proactively equipped with assets to share and celebrate it in a legally compliant manner.

The advance of generative AI as a content creation aid will reduce the time required to create and localize, but there must also be an understanding and collaboration between the rights holder and its broadcast partners to achieve a mutually-beneficial outcome.

## There is no 'second screen'

Sports has to win on two screens at once



3

## One hundred voices are better than one

An effective method to measure the health of a sports league or team's digital popularity is to count the number of independent voices proactively and voluntarily producing content about it.

A survey from YouTube found that 65% of Gen Z now identify themselves as video content creators, and we are moving beyond the era where most of your audience is happy to be a passive observer. This creates a huge opportunity for all forms of entertainment willing to lean into the audience's desire to create. Globally influential figures can have a transformative effect on the popularity of a team or event. The NFL's Kansas City Chiefs felt this impact when Taylor Swift became an enthusiastic attendee, but figures with this level of allure are few and far between. In a content discovery space dictated by algorithm, sports properties would achieve greater impact by harnessing a digital ecosystem which nurtures 50 engaged creators with 10,000 followers apiece, or 500 with 1,000, rather than aspire to court one 'influencer' with 500,000 or more.



Phones still reign, but 2025 starts

# the true era of wearables

Snap, Meta, Microsoft and Apple are increasing their investment in tech that attempts to integrate seamlessly into our lives and onto our bodies.

Thus far, millions of us have bought and used these devices, but they have not displaced the smartphone yet.

This will be the year when wearable tech finally starts to truly compete with the phone for our attention. Soon, with the glance of an eye, users could find themselves connected to music, their fitness stats, or the internet. Screenshot may reduce on your smartphone, but your digital connection could now become permanent.

Wearables are for real, and sports needs to prepare for a world of potentially infinite user data and distraction.

## Trend 02



Phones still reign, but 2025 starts

## the true era of wearables

Wearable tech in and of itself is not a trend.

For starters, estimates suggest Apple has sold over 250 million Apple Watches worldwide since creation and there are 125 million members with access to the fitness wristband brand WHOOP; this is no fad.

The question is not about which one piece of tech you will own, but how many of them.

We can now walk around with four to five 'smart' devices on us – a watch, phone, fitness tracker, earbuds, and even glasses.

**"It needs to be good in order for you to want to keep it on your face."**

Mark Zuckerberg, Co-founder & CEO, Meta

Between them, they have the ability to track several data points, create content and augment reality. This creates opportunities for sports, or at least changes the parameters.

With every opportunity comes a potential threat. With so much tech on one user, there is always something available to distract a user away from your event.

Imagine a user with their five elements of wearable tech on. Notifications on their phone, alerts on their wrist, conversations in their ear. How are you going to keep them focused on what you're providing?

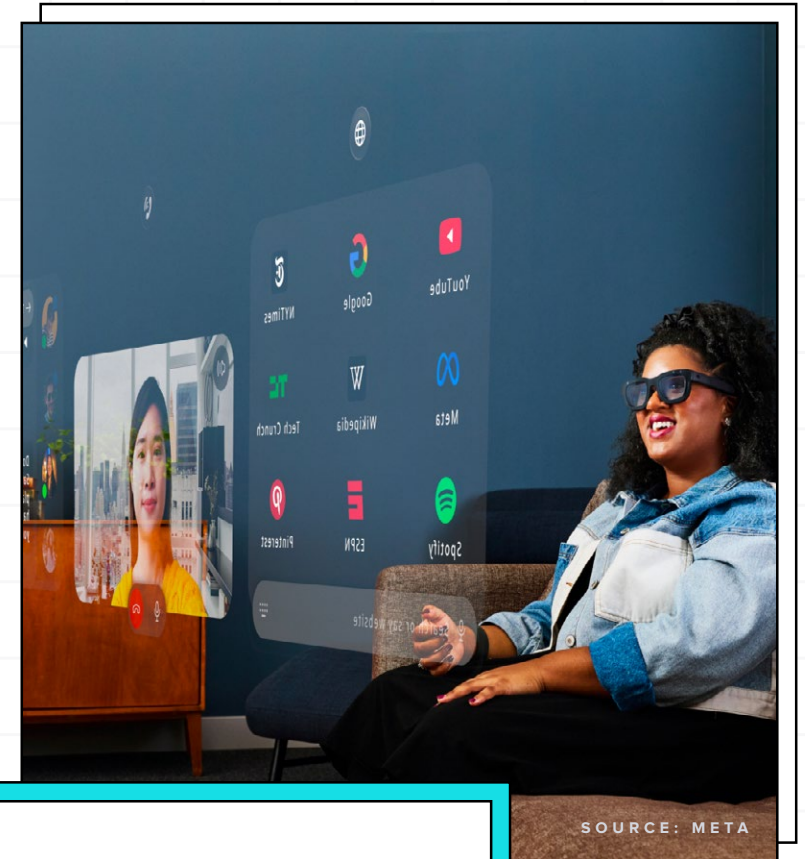
Welcome to a new version of the attention economy.

This is just the beginning.

Tech giants such as Meta and Snap are focused on smart glasses heading into 2025. Meta's Orion AR glasses and Snap's fifth iteration of their Spectacles, alongside a new proprietary operating system for the glasses, hope to break the smartphone's monopoly on our attention.

The journey to fully-fledged smart glasses will be gradual, rather than sudden. However, we could be beginning the evolution away from the smartphone, with everything available at the glance of an eye.

Sports must have a plan for wearables. Both to prepare for the benefits (influx of data about customers) and its dangers (users distracted away from the product you're providing).

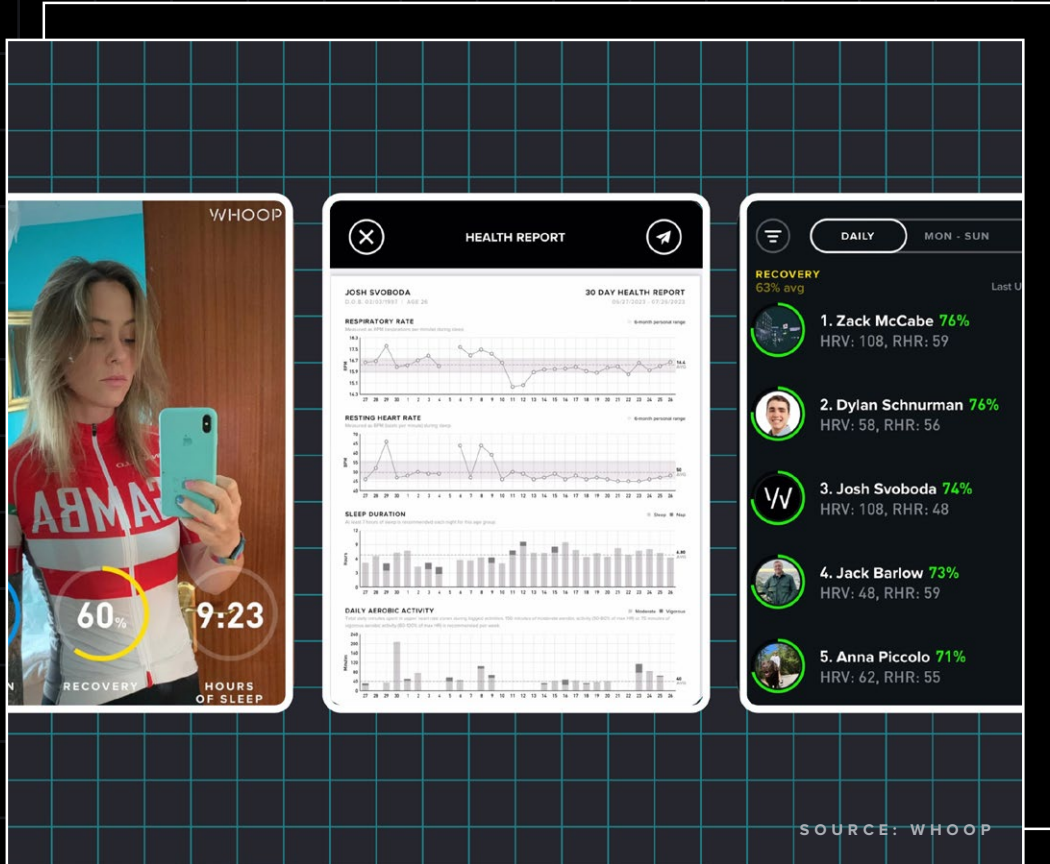


**I think glasses allow us to use computing grounded in the real world, together with our friends, and in a much more natural way.**

Evan Spiegel, Co-founder & CEO, Snap Inc.

Phones still reign, but 2025 starts

## the true era of wearables



1

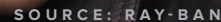
## An opportunity to connect

As users become more aware of the depth of data provided by wearable tech, more people than ever will have access to rich data on their athletic performance, and they will be interested in benchmarking themselves against professionals or members of their community.

This creates opportunities for sports leagues, teams and other rights holders. The increased personal data now available via new wearables may deepen fans' interest in learning more about personal optimization from a reliable source. Especially if that advice is tangible, easy to implement, and then benchmarkable against others.



## the true era of wearables



## Take the easy win

The Ray-Ban range allows for authentic first-person perspectives and inserts fans into places they may not otherwise be able to experience. Pre-existing and well-established formats like “Day in the Life” could be significantly upgraded through the accessible – and elevating – technology.

Beyond that, publishers can test and learn new formats with no significant production effort required. Imagine a golfer explaining first-hand how they tackle a tricky bunker shot with club in hand, unencumbered by video equipment. Perhaps a footballer providing guidance on free-kick techniques, showing how they strike the ball. There's a whole world of content possible that's yet to be fully tapped into.



Phones still reign, but 2025 starts

## the true era of wearables



3

### Prepare for tomorrow, today

The Apple Vision Pro has not yet resulted in heavy unit sales or wider cultural resonance. However, its performance has done nothing to dampen developers' appetite for developing immersive technologies.

All the major players in tech are devoting billions of dollars into the wearable space in 2025. Wearables are the present as well as the future.

Sports organizations and federations need to be ahead of the curve, and have preparations in place across content, CRM, in-stadia activations, and broadcast production. We are used to describing mobile devices as a second screen. As discussed in Trend 1, that is an increasingly outdated term and it will seem particularly archaic from 2025 when, as we believe, some devices could simply require a look to the side to get everything you need.

# AI: Personalization not personalities

It is two years since generative AI came to mainstream prominence with the launch of ChatGPT.

Over that period, the technology has been suggested as a potential solution to almost every issue facing the sports industry. However, we are now seeing what fans and viewers want from AI.

Unsurprisingly, this differs from what the major tech companies have initially offered as public-facing use cases. Fans are responding to real-world events curated by machine learning to fit in with their own schedules and agendas.

Despite the repeated efforts from the likes of Meta, there is minimal appetite to engage with artificially created characters and little thrill in being on one side of what a celebrity interaction may resemble.

They want personalization, not personalities.

## Trend 03

### meta's ai assistants

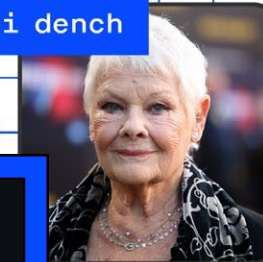
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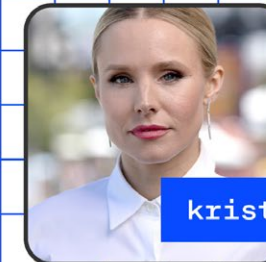
john cena



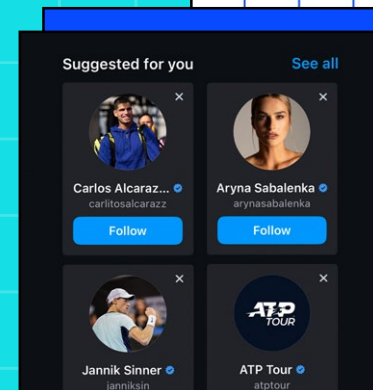
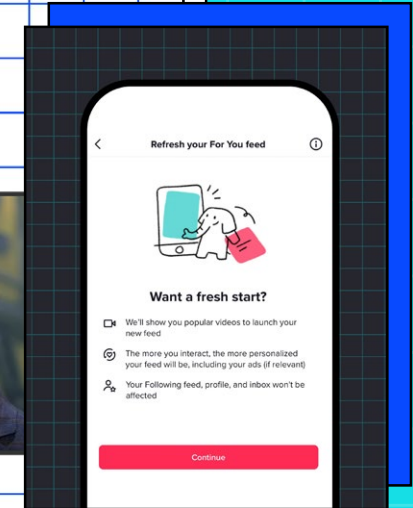
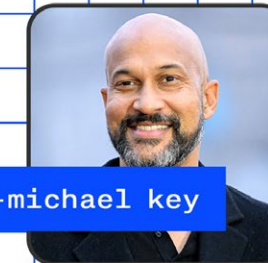
judi dench



kristen bell



keegan-michael key



AI: Personalization not

## personalities

In 2024, we saw a mixture of high-profile successes and expensive failed experiments regarding fan-facing generative AI activations.

Arguably the most successful use case was Peacock's coverage of the Summer Olympics in Paris.

The streaming service allowed its subscribers to state their preferences and preferred means of following the action before delivering a level of coverage tailored to each individual separately.

Every personalized recap was even voiced by an AI commentator trained on the voice of Al Michaels. The legendary Olympics broadcaster made the clips feel more premium and as though the broadcaster was directly talking to its audience one by one.

Note that there was no option to interact with Michaels, but his voice combined with the technology to provide a high-end concierge viewing experience at scale.

**So successful was the AI-powered coverage that Peacock recorded its highest-ever share of TV viewership in August and received praise for its user-friendly delivery.**



Personalized recaps of the Summer Olympics were voiced by the legendary broadcaster Al Michaels.

The rest of the industry has taken notice and rival broadcaster ESPN later announced that it would look to incorporate a similarly personalized approach to subscribers of its forthcoming streaming service.

Flagship news show SportsCenter was once must-see television for sports fans in the US.

In 2025 we will move towards a world where SportsCenter is no longer a national communal viewing experience. Every ESPN subscriber will see their version based on their implicitly or explicitly supplied preferences.

TV viewership will undergo the same seismic shifts that social media users have already lived through.

Social platforms learned long ago that users' interests can differ from what they choose to follow.

This is the reason why almost every major app now defaults to an algorithmically sourced feed of content upon open. The platforms have simply learned what an individual is most likely to engage with more effectively than the users are able – or willing – to express themselves.

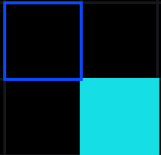
A fragmented broadcast landscape has effectively killed the notion of a listings guide which viewers peruse and then decide what they want to watch.

It will not be replaced with a digital equivalent.

Much like opening a social media app, the next era of viewership for sports fans will see broadcasters inherently understand their preferences and serve them directly – and individually.



## personalities



1

Your event may well be a 'major' or steeped in history and, as such, once commanded a spot at the top of the news bulletins or on the front page of the newspaper sports section. Advancing technology means fans no longer play by the same rules. They will tell you what they consider a 'major', or express it through their behavior patterns. The popularity of individual sports will be more meritocratic based on how effectively they can capture attention and be relevant to modern audiences. The number of eyeballs on your individual sport will be dictated by how much you make people care rather than who you are.



AI: Personalization not

personalities



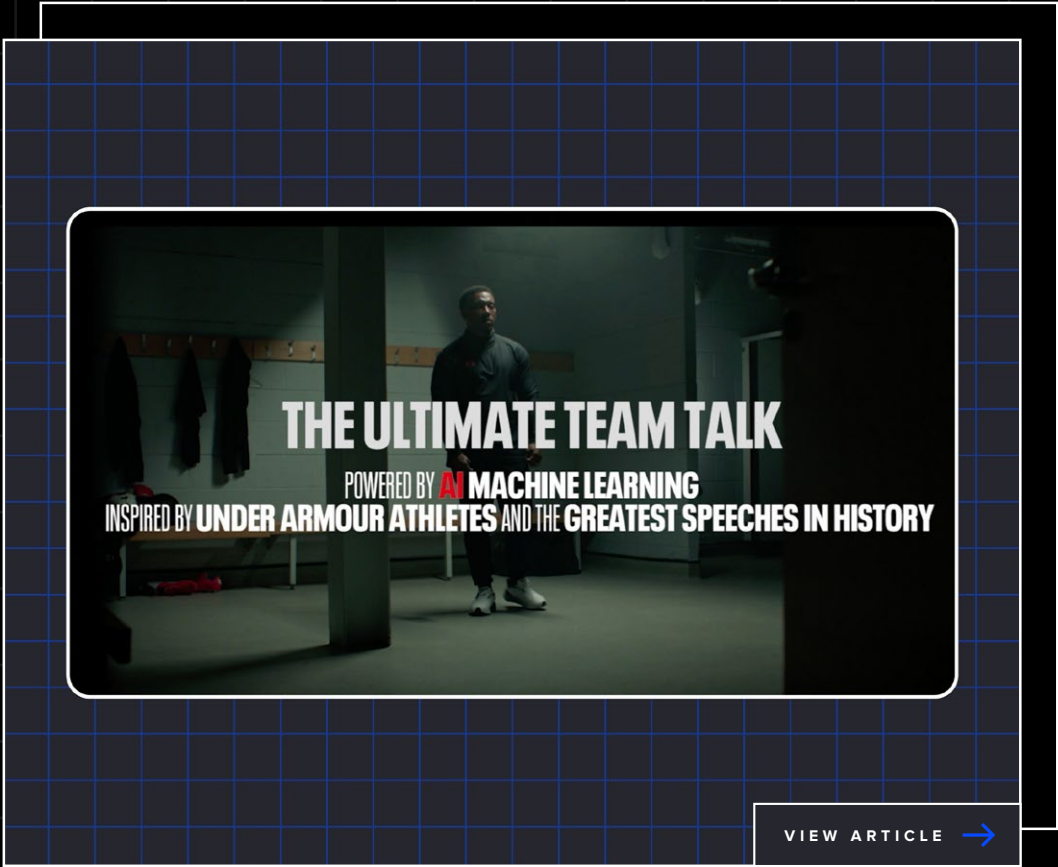
2

## Star power will come to the fore

The star name and celebrity culture which dominates social media could become relevant in the broadcast space.

Of course, high-profile athletes are already used to advertise live games on television. However, in the future, when broadcasters deliver personalized content packages, users will express a desire to watch certain players in addition to their favorite teams. A casual soccer fan, for example, may engage with content featuring Lionel Messi with little idea of who he plays for. This scenario makes it more important for organizations to raise the profile of and associate themselves with star individuals to enable multiple routes into potential viewership. It will also be incumbent upon teams to provide fans and casual observers with ongoing and multiple reasons to identify with them, rather than rely on an assumed inherent loyalty.

# personalities



3

**Recognizable faces may be ever more important, but Meta's missteps can teach us lessons.**

The company's first round of AI celebrity chatbots attempted to replicate one-to-one fan interactions at scale artificially. This was unsuccessful and quickly shelved. Meta's second attempt pivots to a place where celebrities act as AI tour guides while users fulfil their individual use cases. Athletes and legends have a part to play as sports embrace AI to create more engaging fan experiences, but they should be used to capture attention and facilitate a process. Organizations can use the technology to make them say whatever they want in any language of their choosing, which creates unique global opportunities around user experience. Yet, if presenting an opportunity to engage with a player personally, there is no artificial workaround. Fans still demand and expect authenticity.

# People want answers not results

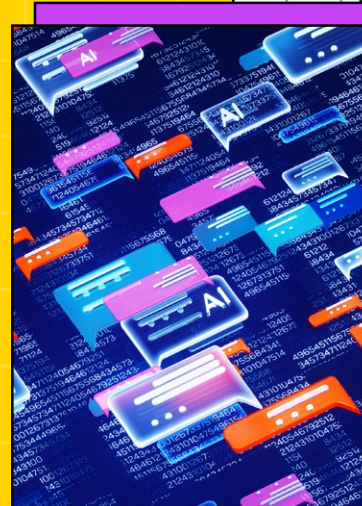
2025 marks the final phase of a particular era of the web. The traditional method of searching for topics and visiting websites with relevant editorial content is ending abruptly.

The new world order will see AI summarize results in just a few seconds.

The question around what your website is even for now comes into sharp focus. Its purpose is no longer to indulge the need for clicks and noise.

In a world of précis, your website needs to become the ultimate source of truth, not just a generator of unclicked results in a search query.

## Trend 04



Google

what is the purpose of a website?



AI Overview

A website's purpose can vary depending on its intended use, but some common purposes include:

### Lead generation

Using forms, CTAs, and other conversion elements to turn web traffic into leads.

### Online presence management

Creating a website with the features needed to attract customers.

### Information

Providing visual and textual content that users can see and read.

### Customer interaction

Gathering data about how customers feel about a business and its outputs.

### Branding

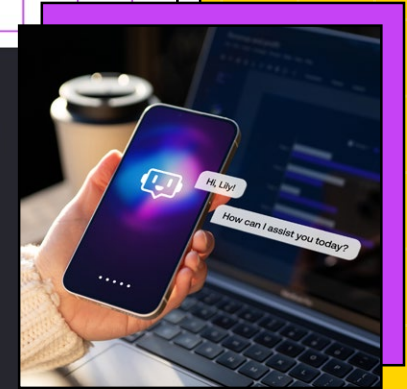
Differentiating a business from its competitors and giving it an individual identity.

### E-commerce

Selling products or services online, allowing businesses to reach a larger audience without maintaining a physical store.

### Education

Presenting information for a variety of people, such as students, teachers, parents, and those looking to change careers.



## People want answers

not results

Looking into 2025, the website – the previously irrepressible stalwart of an organization's digital presence – requires an overhaul of purpose.

You could ask, what is the point of a website anymore?

With declining traffic from all corners of the Internet, the value of original content – written, video and imagery – is being depleted.

The value of a website and its content now exists through its distribution on other portals where users already naturally visit.

Add to this how your website's results will be sucked into large language models (LLMs) and spat out as AI conversations.

The worth of a website transforms to becoming the tip of the sword for an organization's branding. In a world of unreliable, third-party information, an organization's website must create a unique experience with fans with clear interaction points.

**Content is no longer the priority for an owned website. Sports organizations must focus on delivering realities and relationships.**

Google knows its future lies in AI yet faces the classic innovator's dilemma. The giant is in the difficult position of reinventing its search proposition for users, while being a dominant leader in that field.

There are fresh, nimble, powerful challengers. OpenAI's sensational impact on the digital landscape is obvious, as ChatGPT now has 200 million weekly active users.

PerplexityAI, a conversational search engine alternative to Google, is rising in popularity too with 10 million users.

Their combined speed has set the table for users wanting answers not results.

UP TO **64%** ↓

**Organic traffic drop after Google's AI Overviews were launched.**

SOURCE: SEARCH ENGINE LAND

These AI-powered rivals provide answers to questions, to varying degrees of accuracy, whereas Google is best known for providing a list of results.

Unlike Google, which has an expectation of accuracy and reliability, the various AI services are judged less harshly should they make mistakes while growing.

This evolution of search and discovery will result in a continued decline for referral traffic for editorial sites.

Fewer people being directed to their website will have inevitable knock-on effects for sports teams, leagues, and rights holders.

The “why” behind your website must shift. It's no longer just a hunt for traffic, but the true north for your brand, your partners, and your fans.

**All of [Google's efforts are] seemingly without consultation, transparency, permission, or reward for the original curators and rights holders of that information.**

Owen Meredith, Chief Executive, News Media Association



# People want answers

not results



1

## Variety is vital

The website has traditionally been the document of record for those in the sports industry. It's a guaranteed destination where fans can seek clarity.

Therefore, it remains vital that publishers have multiple and diverse means of engaging their audiences and do not become over-reliant on a single platform.

A healthy digital marketing mix includes tailored and personalized email communications, push notifications, an appropriate mix of owned social media channels, and an official presence on third-party platforms such as message boards and chat servers.

## People want answers

not results



2

## Rearrange the resource

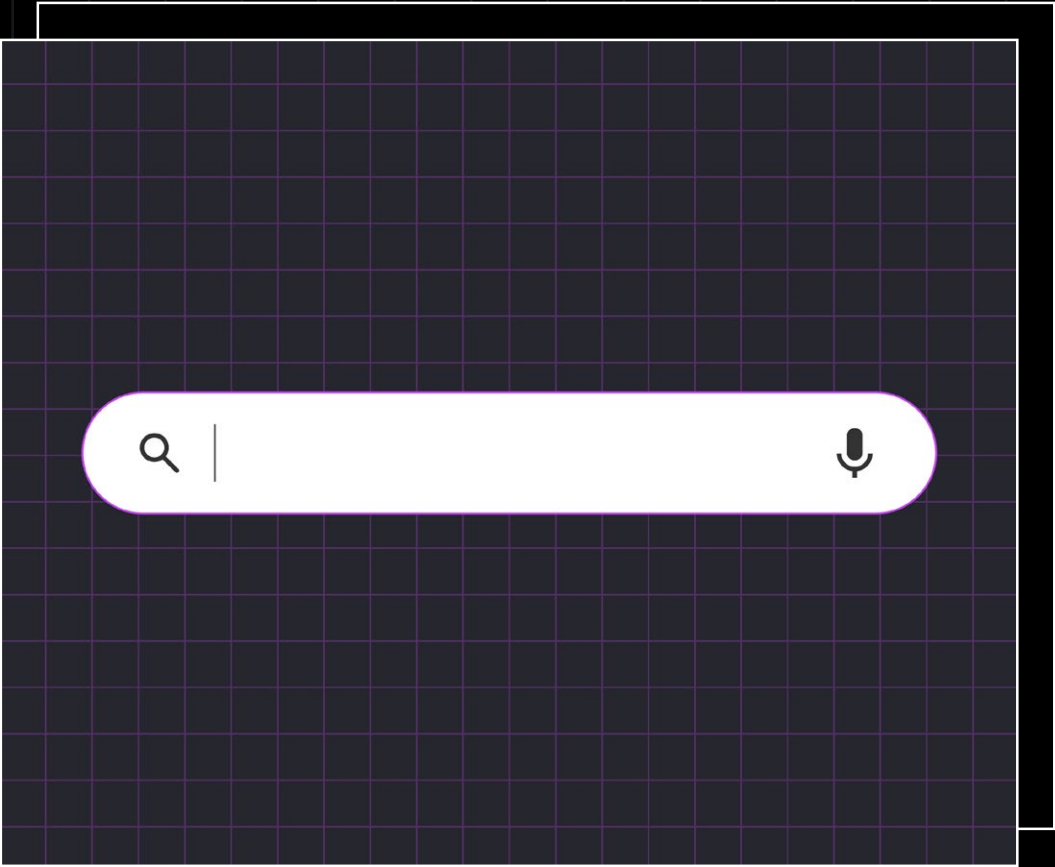
With search absorbing much of your editorial traffic, organizations need to rethink how their resource is structured.

For content, the focus should be on developing distribution networks to push your editorial and messaging through established – and well-visited – locations. The website's value is shifting. If you do develop content, you must maintain extremely high standards for two reasons beyond the obvious. If websites aren't kept healthy with legitimate content, AI can't learn from that content and could hallucinate content as a result, delivering a poor experience for fans.

Equally, there's an opportunity to license content to AI models as they build out and evolve their own offering for fans.

# People want answers

not results



3

## Smarten up your SEO

Google is not the only search engine to factor into your website’s content going forward. With the rise of ChatGPT, Perplexity and Microsoft-powered Bing, there will be a shift in growth in the other ways people search.

Users could spend considerably more time on their chosen search engine, with thousands of spin-off questions around a chosen topic.

SEO-leading content around “What time is kick off?” and “Where can I watch?” will not be strong enough to survive in 2025 and beyond.

Sports organizations need to have a far stronger SEO set up around their content, matching the new behavior of its existing and future users.

## Number

# disruption

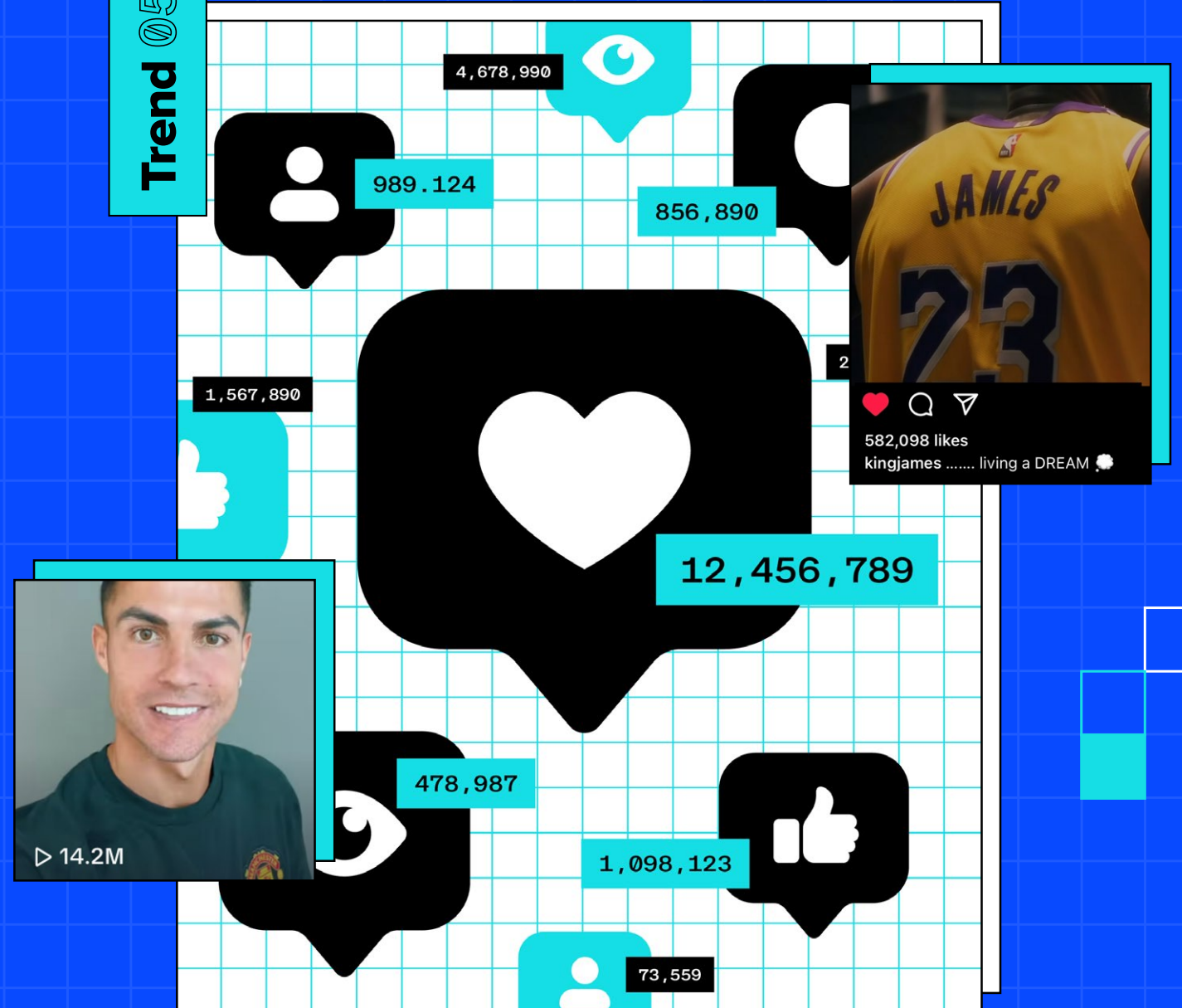
One fundamental way the internet has changed the world is to make abundance normal.

A brand can reach scale – of audience, video views and app downloads – for low marginal cost, and an end user can access all the media in existence. Scarcity in the digital world barely exists.

Abundance means all sports clubs and leagues can cite numbers around their content or their fan services which feel big. Fan passion generates impressions, views and engagements which quickly aggregate into eight-, nine- or even ten-digit figures.

In this context we must question the value and real-world meaning of such big numbers and work to pair them with metrics which represent true community engagement, and indeed place faith in marketing activity that we can't easily measure at all.

## Trend 05





Number

## disruption

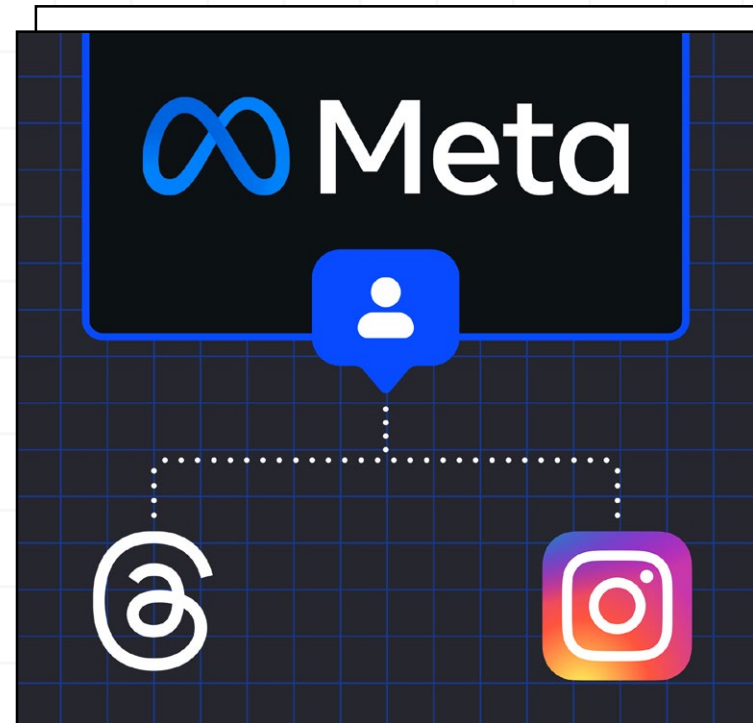
Since the earliest websites ran 'hit counters' in their footer it's been accepted that the more we can measure in digital, the better. No more wastage, reach only the right people at the right time. SMART objectives. Being data-driven. All coming to a LinkedIn post near you.

This has created two particular problems in sports organizations, as they compete for D2C and partnership attention and revenue.

Firstly, the more emphasis placed on numeric reach, engagement, view and impression targets, the more that platforms, publishers and agencies are incentivized to give you the biggest figures.

In 2022 Elon Musk made 'views' the primary public metric for posts on X. We estimate the ratio of views to real people on X (or any social channel) as 10:1, but media regularly cite the number as if it were 1:1.

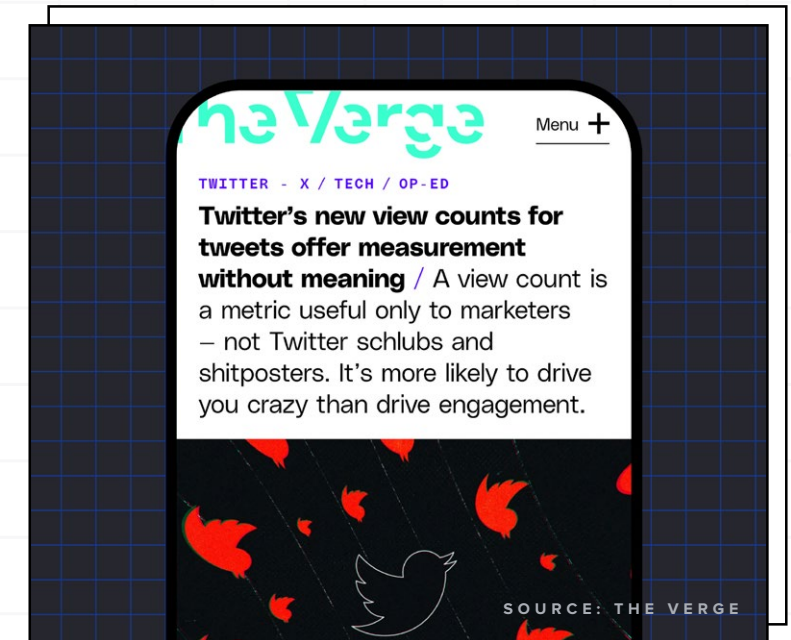
As soon as one platform switches its focus to a new bigger number for creators, advertisers and investors, the others fall in. Meta followed on Threads in May 2024 and Instagram in August 2024. It's a 20-year regression akin to considering 'hits' on web servers to be a primary currency.



Secondly, this lust for big numbers – particularly anything percentage-based like ROAS (return on ad spend) or engagement rate – has put blinkers on the way sports organizations commonly approach marketing and content.

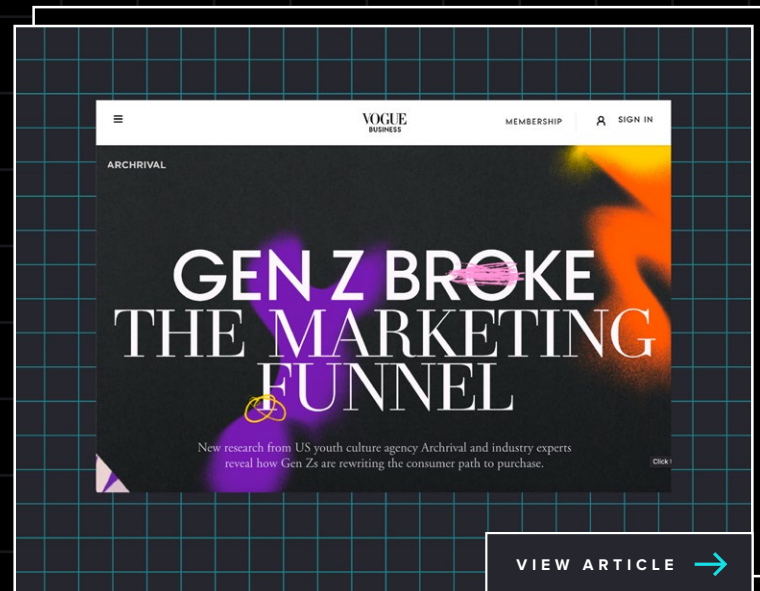
The incentive is only ever to narrow your focus; target the people who are most likely to convert or react, avoid 'wasting' reach on people who might not interact and thus drive those rates down.

The inevitable outcome is a neglect of activity which isn't easily measurable: brand-building, fan affinity and positive sentiment. The trend we observe regularly at sports clubs and leagues is one where short-term conversion needs (eg selling tickets for a game that takes place in 10 days' time) take precedence over long-term community-building. An unvirtuous cycle of filling the stands by any means possible, at the expense of communicating why new audiences should enjoy the event. In 2025 we see that behavior starting to turn, with this focus on short-term numbers being disrupted by greater emphasis on building sustainable communities.



# disruption

A fascinating piece of research into Gen Z online behaviors shows the process getting messier still, where people can reach the advocacy stage without ever having spent any money with a brand. Those users might make zero measurable contribution to return on investment (ROI), but the impact they have on word of mouth and peer influence is still of high value.

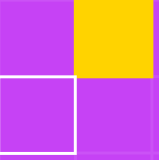


The 1% rule holds that 99% of online community users only view ('lurk') and don't post content, so rather than a 10:1 impressions-to-people ratio, we have a 1:99 creator-to-viewer scale.

Good revenue and profit numbers – the actual important ones – will come from having a great core product proposition and communicating that effectively. That means placing more emphasis on impacts that you cannot immediately track, and we believe the trend moving forwards for the successful sports organizations will be an increased investment in brand and community, to give substance to the reach they already enjoy.

100

## Trend 06





D2C pivots from non-premium content

to utility & gamification

We will see fewer individual league and team content offerings built on non-premium content (and often only available in non-core markets). These simply cannot succeed in an entertainment environment where consumers also have access to huge content libraries like Netflix, YouTube, Spotify and Disney+.

In our 2020 trends we predicted, perhaps somewhat early, that sports fans would reach 'peak subscription' and this is beginning to bear out – the broadcast landscape is going through a consolidation and rebundling process that will see fewer streaming services, not more.

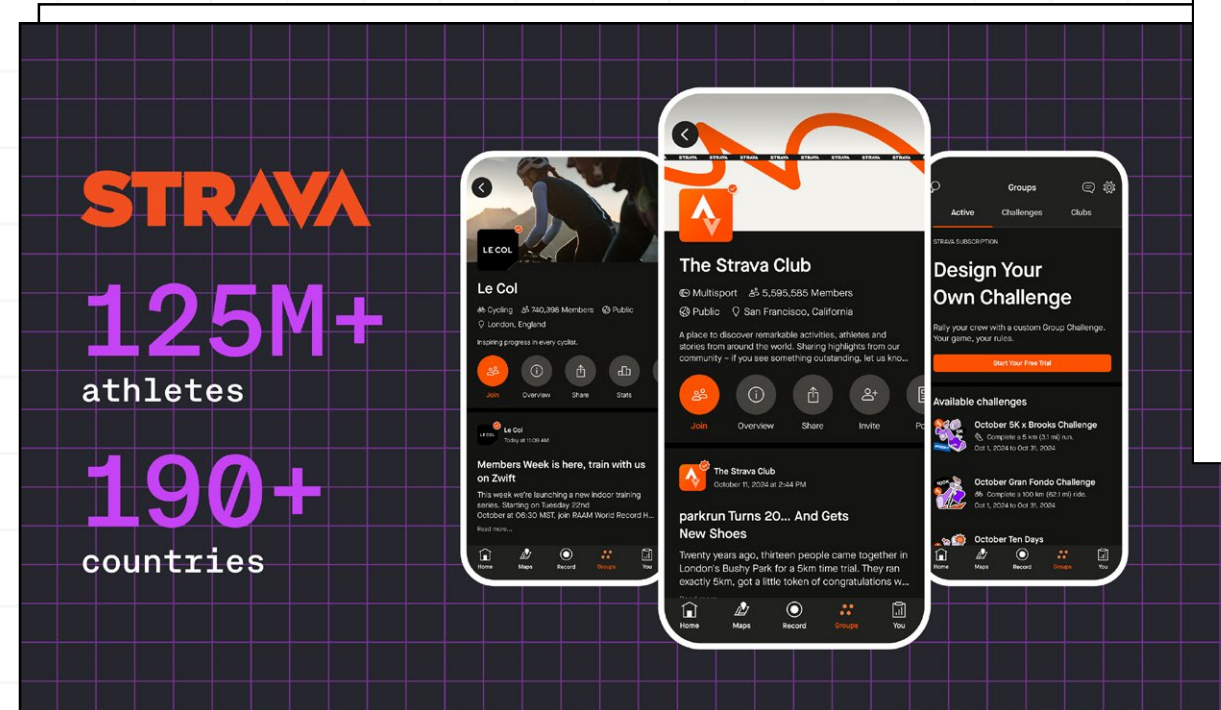
WWE's move to close WWE Network in the US in favor of a deal with Peacock (and more recently with Netflix) was an early bellwether event, signalling the move from a D2C content distribution approach back towards licensing.

WWE were pioneers in the D2C streaming space and you could argue that the audience understanding they developed by launching and growing their own streaming service put them in a position to do these deals (as well as the one they struck with Fanatics for retail and merchandise).

You could also argue that it's simply easier to license high quality IP to specialists in their business model and focus on your on your core business.

Let's be clear, sports is not done with streaming premium content – that market will continue to grow. Where premium content has been licensed however, sports will look either to create new premium content or offer other forms of value by creating a 'Strava for...' in their category.

Strava has successfully offered runners, walkers and riders a way to measure their activity alongside gamification elements like badges and leaderboards to keep them coming back to the product. Sports with a strong participation base will try to own the participation space. Other sports that don't have a strong link back to participation will also look to gamification and rewards to create new and different value propositions on which to hang their D2C efforts.

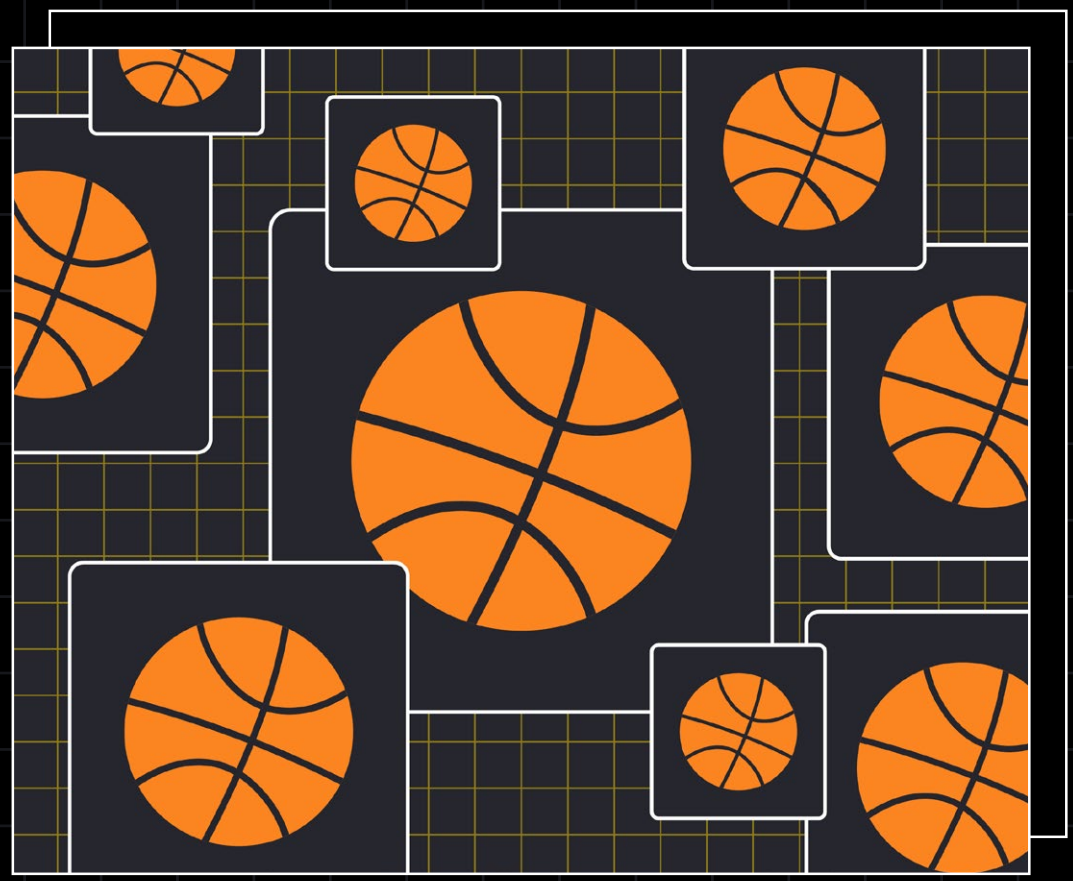


Strava has created the leading digital community for active people with more than 125 million athletes in more than 190 countries. 2025 will see more sports rights holders trying to launch similar gamified utility platforms.



D2C pivots from non-premium content

to utility & gamification



1

# Keep the main thing the main thing

We think that in the current rebundling cycle, sports will increasingly choose to focus on the core business activities that they really need to deliver well to drive value: putting on great spectacles, assembling the best talent, ensuring the integrity of their competitions and building compelling brands and stories around their properties.

INEOS' investment into Manchester United saw it take control of football operations, while Mark Cuban sold all but his basketball operations stake in the Dallas Mavericks. This points to a focus on the core asset in sports – the quality of the sporting product.

## to utility & gamification



## First-party data, third-party specialists

**Sports will predominantly still commercialize their content-based IP, as they always have done, via business-to-business specialists. This will not spell the end of their D2C ambitions.**

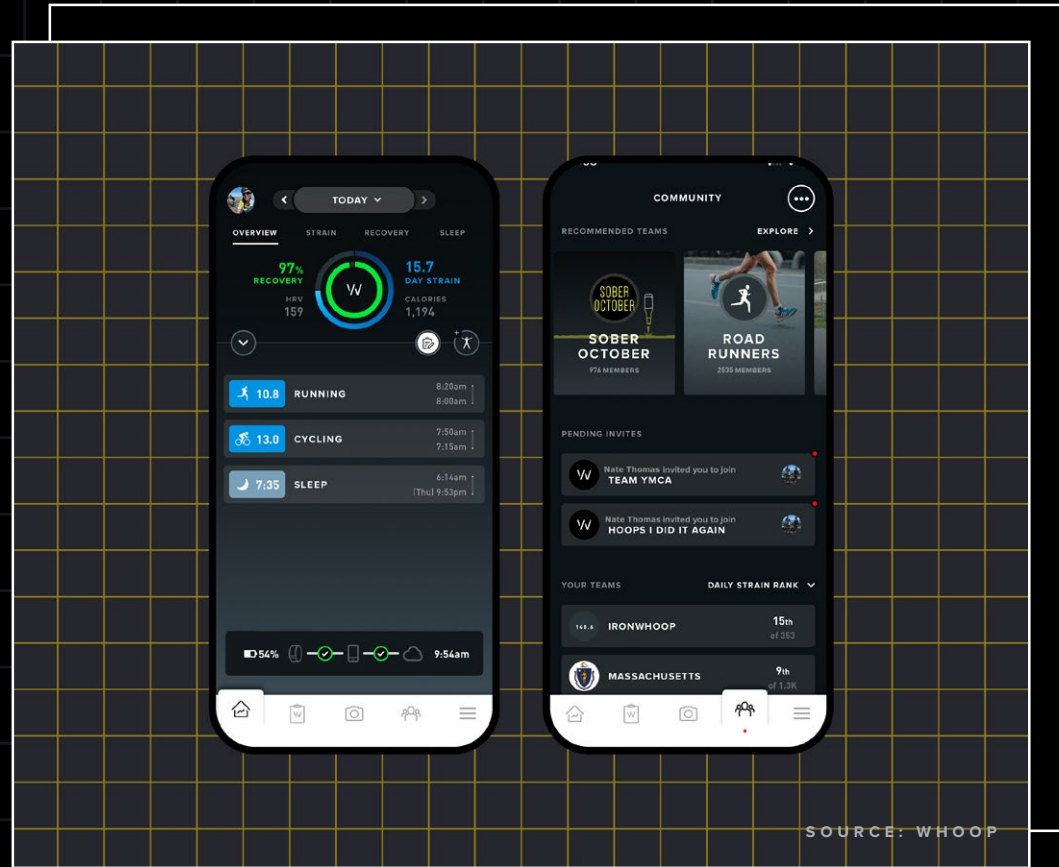
Sports will still need a revenue diversification play after all, especially those in the squeezed middle that are experiencing challenges with their broadcast deals.

First, sports will need to be more disciplined about the D2C value proposition it's putting together for the consumer, and secondly it needs to be realistic about the kind of data business it can be.

To the latter point, data businesses are valuable when they aggregate enormous quantities of data and have the engineers, data scientists, product experts and sales networks to support the commercialization of those large data sets.

D2C pivots from non-premium content

to utility & gamification



3

## Utility, gamification & rewards offer a new value proposition

Having rich customer data will still be important for many sports properties but they will need to think more deeply about the value they are offering in exchange for that relationship.

We expect to see sports properties build valuable new media assets based on an entirely different relationship with the consumer. Sports with a strong participation base will look to build upon the trend towards consumer self-measurement by offering utility tools that help people track and improve their performance. These experiences will be gamified to encourage repeat engagement. Sports boast fans with shared interest that they can bring together in new social forums, so community tools and engagement platforms will play a role too.

Sports will consider different types of content that offer D2C value. These may include training aids, diet plans, or mental wellness and coaching expertise but the key is, this content will still be premium and not the remnants of what could not be licensed to third parties.

Sports monetizes

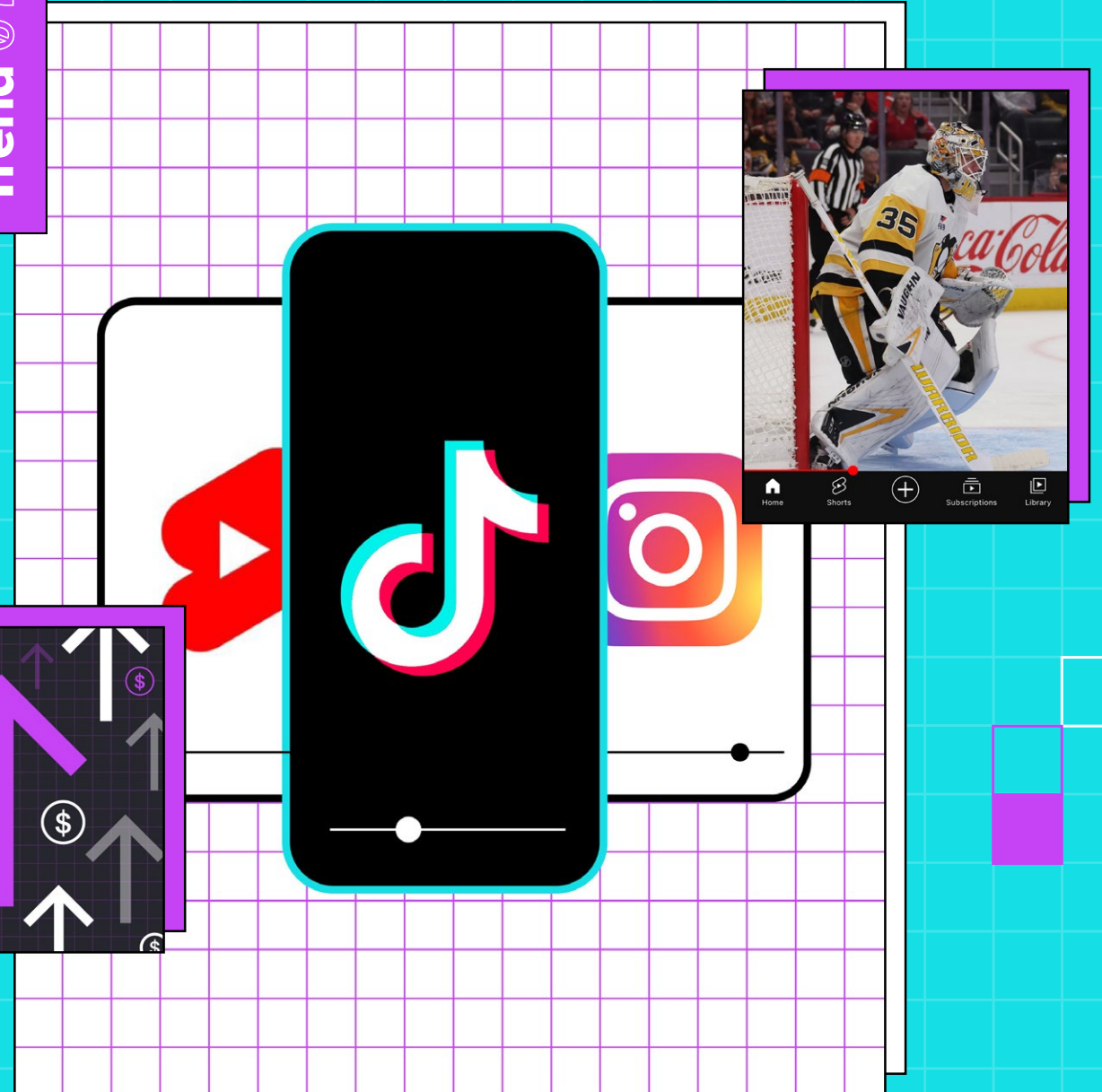
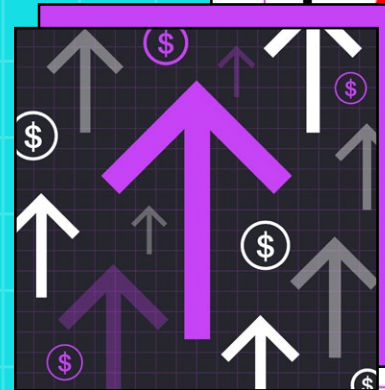
# short-form & non-live content

In recent years, sports organizations have seen outsized performance growth from their vertical video and short-form content output.

Leagues, teams and athletes have been able to report continued follower and consumption growth from the emergence of platforms like TikTok and formats like YouTube's Shorts and Instagram's Reels. However, they haven't seen a meaningful commercial return as of yet.

In 2025, that changes. As with other media in the past, revenue models have lagged consumer attention but next year sports will start to monetize their short-form and non-live rights in a meaningful way.

Trend 07





## short-form & non-live content

Short-form video platforms have exploded in popularity in recent years. TikTok now has over one billion monthly active users worldwide and its US revenue alone is reported to have reached \$16bn in 2023.

Instagram Reels, which as a format within the main Instagram app is only four years old, reports that 2.35 billion people interact with Reels every month, the majority of these users being in the 25 to 34 age group.

According to Alphabet Investor Relations, YouTube Shorts are viewed over 70 billion times every day with over 910 million Shorts posted to YouTube to date.

Yet, the money creators make from Shorts is typically \$0.01–\$0.06 per 1,000 views, an order of magnitude lower than for long-form videos where in comparable markets average earnings may vary between \$1.25 to \$2.5 per 1,000 views.

In digital circles we are used to seeing big numbers and we have become increasingly acclimated to the follow-on question, ‘so what?’.

**The industry needs to square the circle between user consumption and the revenue that flows back to IP owners, otherwise all these big numbers don’t add up to much.**

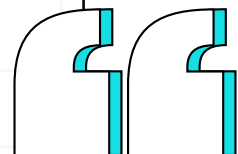
2025 will be the year when sports starts to see a genuine commercial return from short-form content. We anticipate that the platforms themselves will offer better monetization terms to creators, bringing short-form more in line with long-form.

# \$16BN

TikTok revenue across the US in 2023

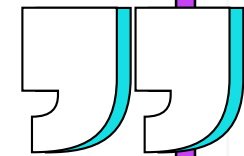
SOURCE: REUTERS

More savvy rights holders will build short-form content packages into brand partnership agreements as we’re starting to see some already do, using platforms like Greenfly and WSC.

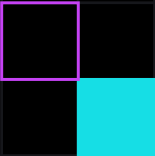


Short-form content is now a primary way that many fans engage with sports, and rights holders must tap into its media and sponsorship value. It’s no longer just a teaser for live games – it’s becoming a main event. Fans rely on this content to follow and support their teams. And it’s not just repackaged material; it’s a new source of experiences. Rights holders have a prime opportunity to start to capture this value themselves, rather than letting third parties profit, as they adapt to the evolving fan experience beyond the live game.

Daniel Kirschner, Co-founder & CEO, Greenfly



## short-form & non-live content



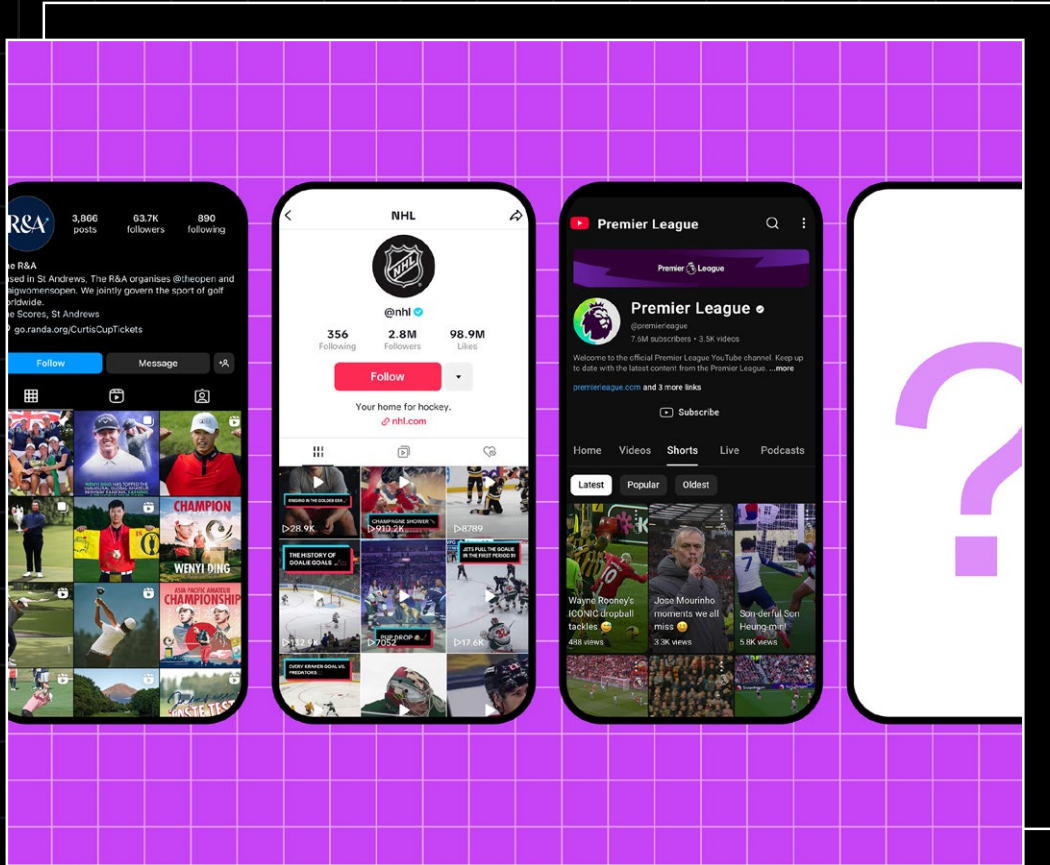
## Putting content in the hands of brand partners

Emerging technology solutions now allow rights holders to easily and quickly route content to new destinations and integrate partner branding and storytelling components in near real-time.

With automated distribution capabilities, leagues can now make highly-engaging short-form clips directly available as brand destinations, complete with brand wrappers and messaging. This will form an increasingly valuable asset within wider sponsorship packages, delivering net new and, importantly, direct revenue from short-form digital content (the stuff the industry is used to giving away).

Sports monetizes

## short-form & non-live content



2

## New distribution channels

As a consequence, we will start to see a market emerging for short-form content, with leagues starting to build packages for third parties to license competitively.

We will see the emergence of new short-form distribution channels (including league-owned services) which will become buyers of short-form content. Leagues will grow more relaxed about creators accessing and augmenting this content.

Sports monetizes

## short-form & non-live content



3

### Platforms share (a little) more

This will put pressure on the super-platforms to offer more competitive revenue sharing arrangements to sports properties.

Revenues shared by platforms to rights holders will continue to be eclipsed by traditional distribution deals and leave larger rights holders questioning whether platform revenues will ever amount to much.

For others, however, short-form content deals will serve as a much-needed source of revenue diversification to help fund audience growth and engagement initiatives.



# Platform

## power rankings

### Ranking the most important third-party media platforms for the global sports industry.

In year two of our platform power rankings, we have seen notable changes to the top 12. There is a new king, and its name is YouTube. The Google-owned platform was clearly number one in the eyes of our analysts.

**YouTube** is a behemoth with more than 2.7 billion active users, over 100 million of whom subscribe to its Premium or Music services. More than 150 million Americans watch it on their TVs every month, and it became the first streaming platform to surpass 10% of overall viewership in the market.

It is undoubtedly a priority platform for our partners in the sports industry. A lucrative home for publishers of all sizes and shapes – from long-form content to vertical virals and paywalled creators to multi-camera live broadcasts – thanks to its ability to reach, engage and monetize audiences.

An increasing number of athletes past and present have also successfully launched their own channels, including Cristiano Ronaldo, Bryson DeChambeau and Tom Brady.

**TikTok**, the former holder of the number one spot on our list, falls to #3 in the 2025 rankings. Although it remains influential, it has been a turbulent 12 months for its parent company, ByteDance, with security concerns, legal challenges, and an ongoing struggle for creators to effectively monetize on their platform. Several of our clients have also seen year-on-year declines in engagement.

**Facebook** remains in the #4 position, but almost by default and remains cut adrift of a dominant top three. Meta stablemate **WhatsApp** also remains in the #5 position, but there has been widespread disappointment among our clients relating to the lack of evolution on its Channels feature over the past 12 months.

**Reddit** is the biggest riser on the list, going from #10 to #6, and one year on, it is a much more credible consideration for sports industry rights holders. This coincides with a wider industry shift towards community-focused platforms, but Reddit has also grown up and signed major highlights deals with several sports leagues while also rolling out enhanced tools to make it more accessible for channel managers.

**X** falls one spot to #7, and although we have seen many clients take steps to reduce their reliance on the platform for live news and updates, no other platform has shown itself capable of taking its place in this regard.

**Threads** rises from #12 to #10 after a year of sensible and strategic product iteration combined with a growing user base, despite largely failing to grow in influence meaningfully.

#1		<b>YouTube</b> 2024 RANK: #2	
#2		<b>Instagram</b> 2024 RANK: #3	
#3		<b>TikTok</b> 2024 RANK: #1	
#4		<b>Facebook</b> 2024 RANK: #4	
#5		<b>WhatsApp</b> 2024 RANK: #5	#9 <b>Snap</b> 2024 RANK: #9
#6		<b>Reddit</b> 2024 RANK: #10	#10 <b>Threads</b> 2024 RANK: #12
#7		<b>X</b> 2024 RANK: #6	#11 <b>LinkedIn</b> 2024 RANK: #7
#8		<b>Discord</b> 2024 RANK: #8	#12 <b>Twitch</b> 2024 RANK: #11



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