



EXECUTIVE INSIGHTS

How Sports Fandom Is Evolving in 2025: Insights From L.E.K.'s Annual Sports Survey

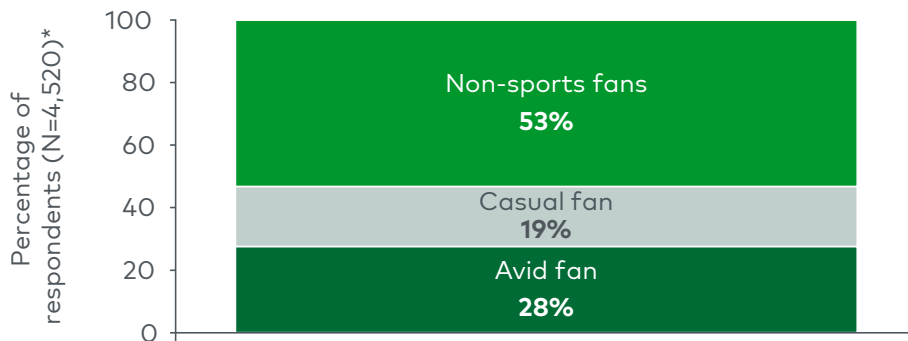
Introduction

Sports fandom in America continues to evolve in response to changing demographics, media fragmentation and shifting cultural preferences. To capture these dynamics, L.E.K. Consulting conducted its annual Sports Survey in January 2025, gathering insights from 4,520 U.S.-based adults who serve as primary decision-makers for media purchases in their households. Respondents evaluated over 20 professional and collegiate sports leagues across more than 50 distinct metrics.

The data reveals that 47% of respondents identify as sports fans, with 28% describing themselves as avid fans and 19% as casual followers. The NFL stands out as the most popular league, with approximately 32% of survey respondents identifying as avid NFL fans – significantly higher than MLB (17%), college football (16%) and the NBA (14%) (see Figure 1).

Figure 1

Interest in traditional sports (December 2023-January 2025)



*Survey questions: Please indicate your level of interest in each of the following topics; how involved are you in your household's decision to make purchases related to media, sports and entertainment?

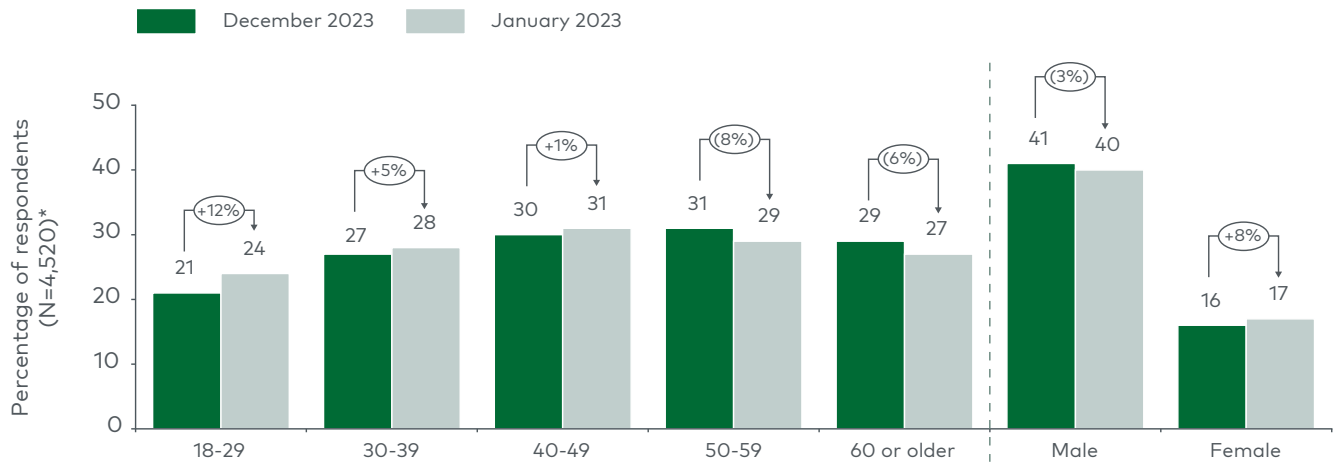
Note: Sports fans comprise 47% of U.S. adults, with most identifying as avid fans

Source: L.E.K. Consulting 2025 Sports Survey

Even though overall sports fandom remained stable year over year, our demographic analysis uncovered important shifts in the composition of the fan base. Notably, younger adults under 30 showed a 12% increase in interest compared to last year, and women saw an 8% increase in sports engagement, suggesting a generational and demographic transformation in who is following sports (see Figure 2).

Figure 2

Change in avid interest in traditional sports, by age group and gender



*Survey questions: Please indicate your level of interest in each of the following topics; how involved are you in your household's decision to make purchases related to media, sports and entertainment?

Note: Overall sports fandom remains stable, with growth among younger fans and women

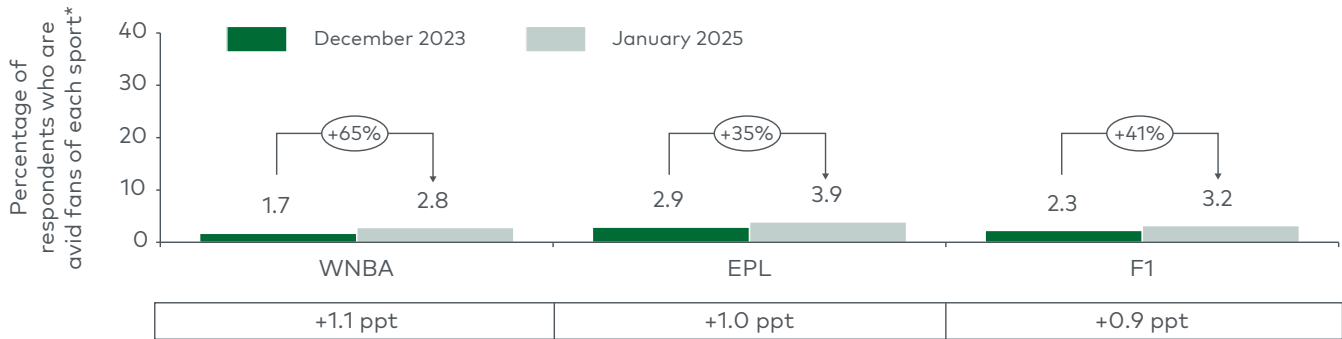
Source: L.E.K. Consulting 2025 Sports Survey

These demographic changes coincide with shifting league fortunes. Our analysis identified clear winners and losers in the competition for fan attention, with certain properties experiencing substantial growth and some traditional powerhouses facing declining interest. The Women's National Basketball Association (WNBA) led all leagues with a remarkable 65% year-over-year growth in avid fandom, followed by the English Premier League (35%) and Formula 1 (F1) (41%).

Conversely, men's college basketball saw an 18% drop in avid fandom, followed by an 11% decline for college football and an 8% decrease for the NHL — representing millions of lost fans across these established leagues (see Figure 3).

Figure 3

Top three largest percentage point increases in avid fan incidence (December 2023-January 2025)



*Survey question: How interested are you in each of the following sports leagues? (N=4,520 in 2025 survey; N=4,554 in 2024 survey)
 Note: WNBA, EP, and F1 saw the largest increases in avid fan growth; PPT=percentage point; WNBA=Women's National Basketball Association; EPL=English Premier League; F1=Formula 1
 Source: L.E.K. Consulting 2025 Sports Survey

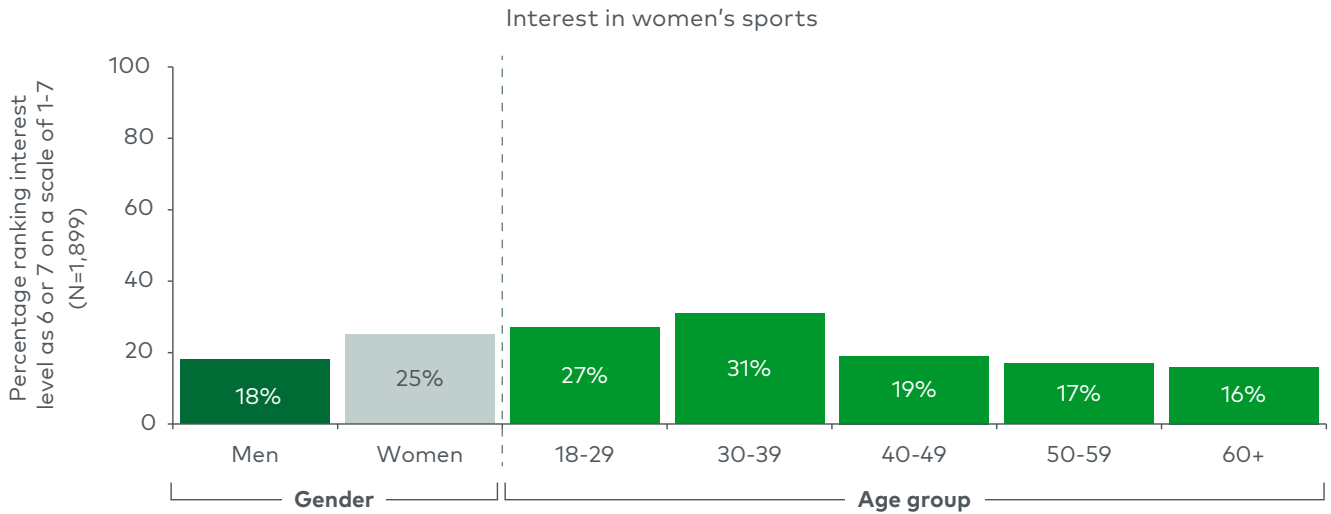
Women's sports experience breakthrough momentum

The advance of women's sports has moved beyond incremental growth to meaningful market impact. The WNBA's 65% increase in avid fandom leads all leagues in growth, indicating a significant shift in the marketplace.

The survey asked interested fans to identify key drivers of their interest in women's sports. Top reasons included the quality of play (25%), to support equal opportunities for women athletes (24%), strong role models (23%) and general sports fandom (22%). Female fans were especially likely to cite strong role models (33%), but male fans most often pointed to the quality of play (27%) and interest in sports more broadly (25%).

Interest in women's sports is strongest among women and younger fans, creating a favorable demographic tailwind. While still a subset of the broader fan base, this engagement is broad-based and signals a healthy foundation for future growth (see Figure 4).

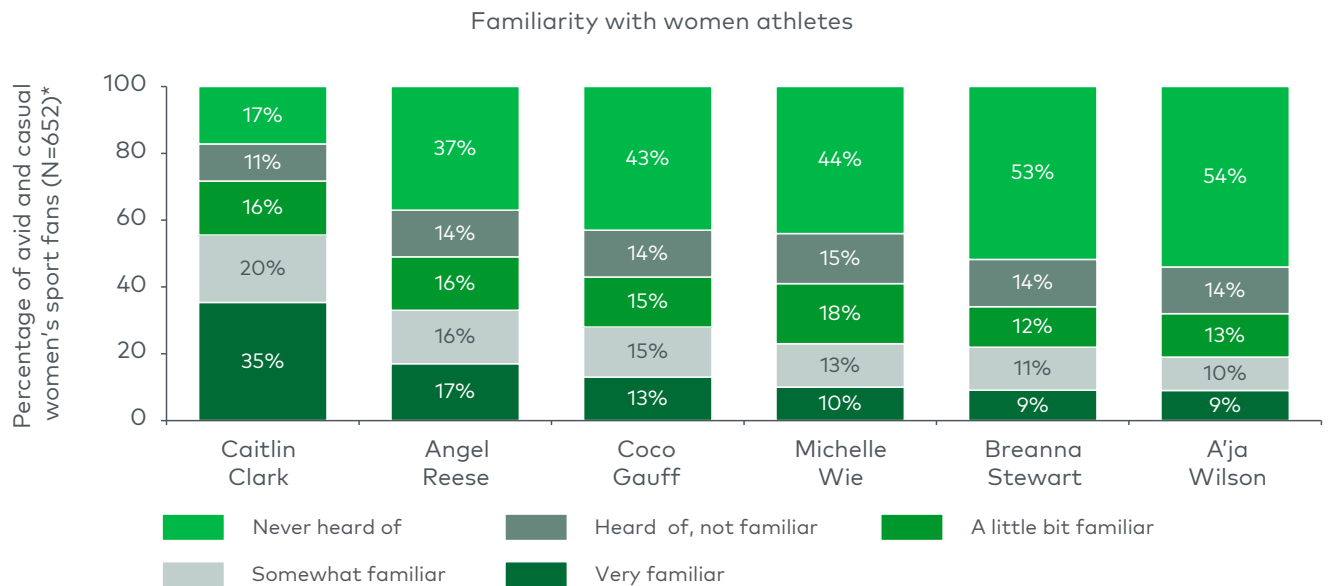
Figure 4



Note: Interest in women's sports is highest among women and fans under 40
 Source: L.E.K. Consulting 2025 Sports Survey

This momentum has translated into major media rights deals. The WNBA's annual value jumped¹ to \$200 million, and the National Women's Soccer League (NWSL) grew² from \$1.5 million to \$60 million. The "Caitlin Clark effect" exemplifies this transformation. Her exceptional recognition among fans helped drive a 161% WNBA viewership increase,³ showing how transcendent stars can reshape league economics (see Figure 5).

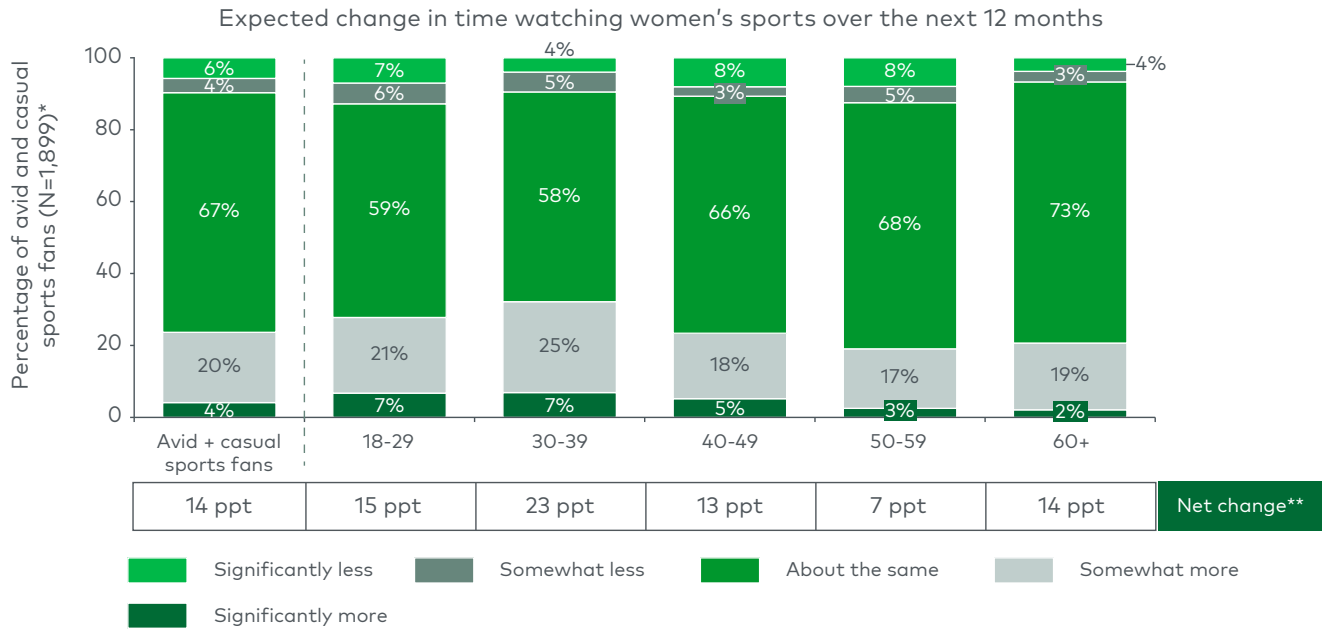
Figure 5



*Survey questions: How interested are you in women's sports? How familiar are you with each of the following athletes?
 Note: Caitlin Clark more than doubles the "very familiar" recognition of any other female athlete among the 15 top women athletes included in the survey
 Source: L.E.K. Consulting 2025 Sports Survey

Looking ahead, fans expect their engagement with women's sports to increase. The survey shows a positive 14% net change in expected viewing time for women's sports over the next 12 months, with the strongest growth anticipated among fans ages 30-39. Even among older fans and casual viewers, the forecast remains positive (see Figure 6).

Figure 6



*Survey questions: How interested are you in women's sports? How do you expect your overall time spent watching women's sports to change over the next 12 months?

**Represents (significantly + somewhat more) minus (significantly + somewhat less)

Note: Fans expect to increase their women's sports viewing in the next 12 months

Source: L.E.K. Consulting 2025 Sports Survey

Soccer's complex position in the US

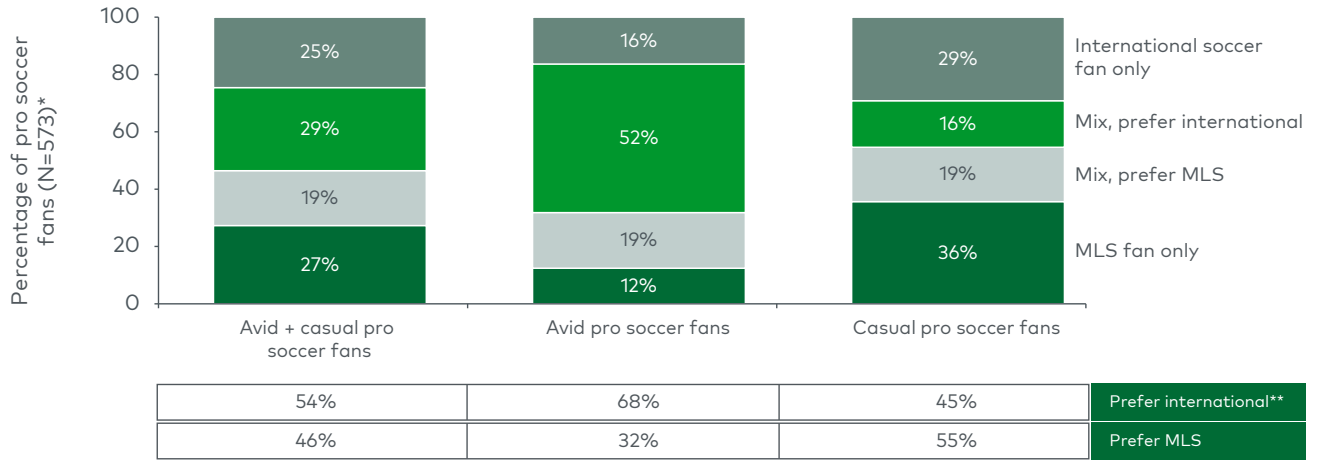
This demographic stability seen in women's sports offers an interesting contrast to soccer's more fragmented position in the American sports landscape. While women's sports demonstrate consistent growth across age groups, soccer in the U.S. presents a more complex picture, with stark divisions between casual and avid fans. The NWSL has benefited from the broader women's sports momentum, but men's soccer displays a different pattern altogether.

MLS holds the top spot for overall popularity among U.S. soccer leagues, with 3% of sports fans identifying as avid MLS fans and 10% as casual fans. However, among dedicated soccer enthusiasts, international leagues command greater allegiance.

The survey reveals that 68% of avid soccer fans prefer international leagues, with the English Premier League (EPL) leading the pack. This preference for international soccer is most pronounced among the most engaged fans, but casual soccer fans still favor MLS by a 55% majority (see Figure 7).

Figure 7

Interest in MLS vs. international soccer leagues (January 2025)



*Pro soccer fandom determined by the highest level of avidity across the measured sports leagues

**International soccer leagues tested include EPL, Bundesliga, La Liga and Serie A

Note: Most avid soccer fans prefer international leagues over MLS; MLS=Major League Soccer; EPL=English Premier League

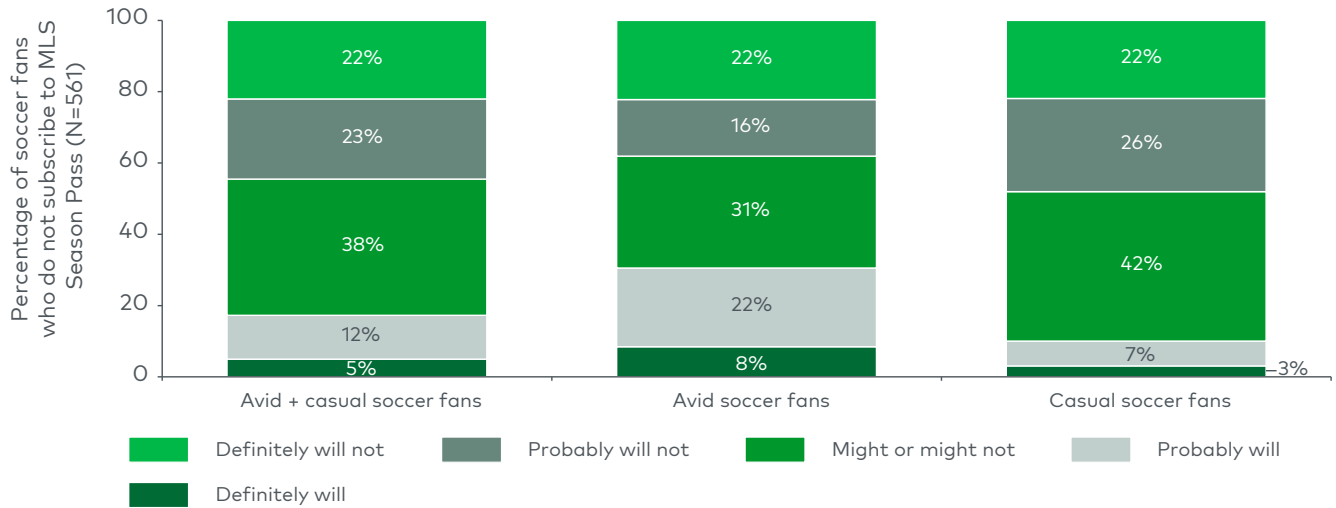
Source: L.E.K. Consulting 2025 Sports Survey

When analyzing preference drivers, clear distinctions emerge between fans of different leagues. MLS fans primarily value local team support and star power (such as Lionel Messi), while EPL enthusiasts overwhelmingly cite the higher quality of play (46%), global star power (26%) and prestigious club history (24%). This highlights MLS' central challenge: Despite attracting major stars, it still trails international leagues in perceived quality, particularly among avid fans.

Despite early promise, MLS Season Pass adoption has seemingly stalled after initially reaching 2 million subscribers. The exclusive streaming model with Apple has raised accessibility concerns, which may be contributing to the significant viewership declines of MLS linear TV broadcasts, including the MLS Cup. Our survey data suggests MLS may risk losing relevance among the broader sports fan base, with limited subscription interest among nonsubscribers (see Figure 8).

Figure 8

Likelihood to subscribe to MLS Season Pass next season



Note: Fan interest in MLS Season Pass shows limited growth potential; MLS=Major League Soccer
 Source: World Soccer Talk; L.E.K. Consulting 2025 Sports Survey

A changing media rights landscape

As fan preferences shift, so too does the business model supporting them. In a recent edition of *Executive Insights* titled "The Streaming War for National Sports Rights,"⁴ we explored the competitive dynamics of streaming platforms vying for premium sports content. Streamers are expected to invest \$7.1 billion in national sports rights in 2025, up from \$3.9 billion two years ago.

The draw? Live events consistently drive subscriber growth and advertising revenue, particularly among younger demographics that otherwise split their attention across TikTok, YouTube and gaming.

Our 2025 Sports Survey examined this dynamic through targeted questions about platform preferences and viewing habits. The data reveals that 46% of ESPN+ subscribers consider sports content "very important" to their subscription decision; however, fans ages 18-29 spend just 25% of their sports viewing time watching live sports content compared to 60% for fans over 60.

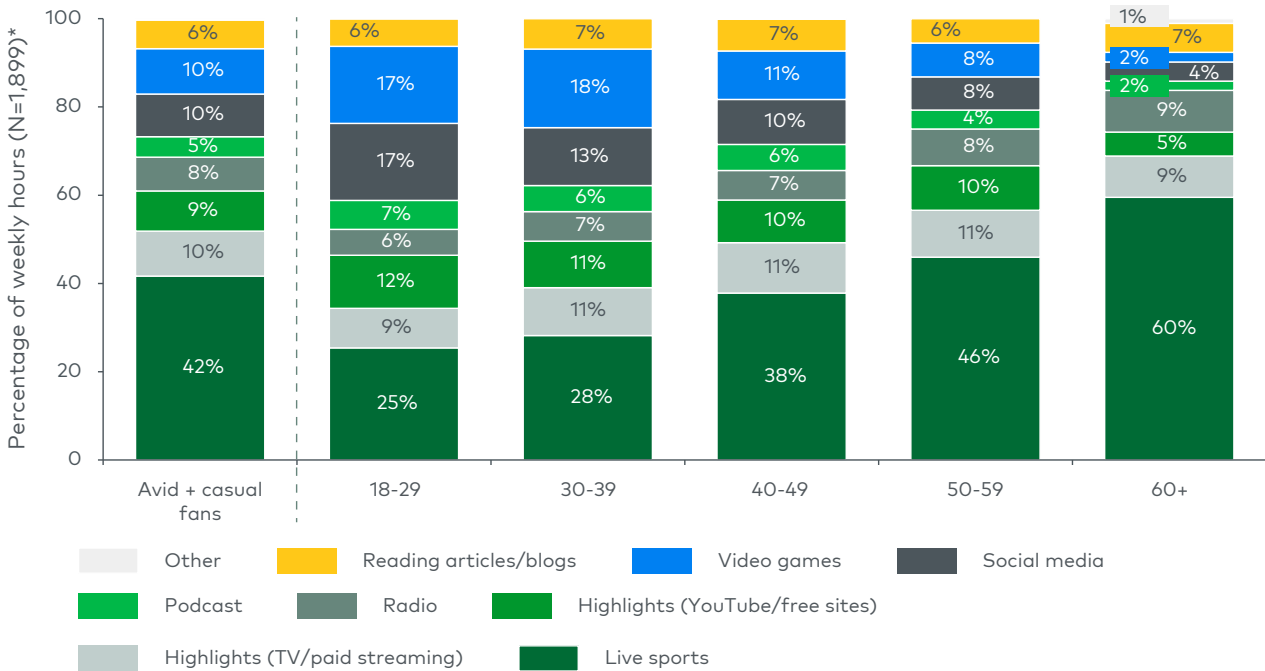
Although the women's sports surge highlighted previously in this report is one outcome of this competitive environment, properties like UFC and F1 are also leveraging their unique audience demographics into stronger negotiating positions. Meanwhile, the regional sports network model faces existential challenges with the Diamond Sports/Main Street Sports Group bankruptcy proceedings — a topic we'll explore in our next *Executive Insights* focused on the local media landscape.

Evolving fandom and shifting consumption

These changes in media rights reflect broader transformations in how fans engage with sports content. The 2025 Sports Survey underscores fundamental shifts in fan engagement. Avid sports fans consume approximately 32% more weekly sports content than do casual fans (20.5 hours versus 14.5 hours), but younger audiences are dramatically reshaping where and how that content gets consumed (see Figure 9).

Figure 9

Average weekly per person hours consuming sports content among avid and casual sports fans, by age group (January 2025)



*Survey question: In a typical week, how many hours do you spend consuming sports content? Please include time spent watching live games, highlights, social media clips; listening to radio and podcasts; reading articles; playing sports video games, etc.
 Note: Avid fans consume 32% more sports content than do casual fans
 Source: L.E.K. Consulting 2025 Sports Survey

In addition to shifting platform preferences, total time spent consuming sports content is increasing. The 2025 Sports Survey shows that weekly viewership is rising across all age groups, with younger fans driving the most significant growth. Among fans ages 18-29, 39% reported watching more sports content than last year — a net increase of 23%, the highest of any age group. This growth is fueled largely by short-form content, social media and gaming — channels that reflect broader shifts in how sports content is consumed.

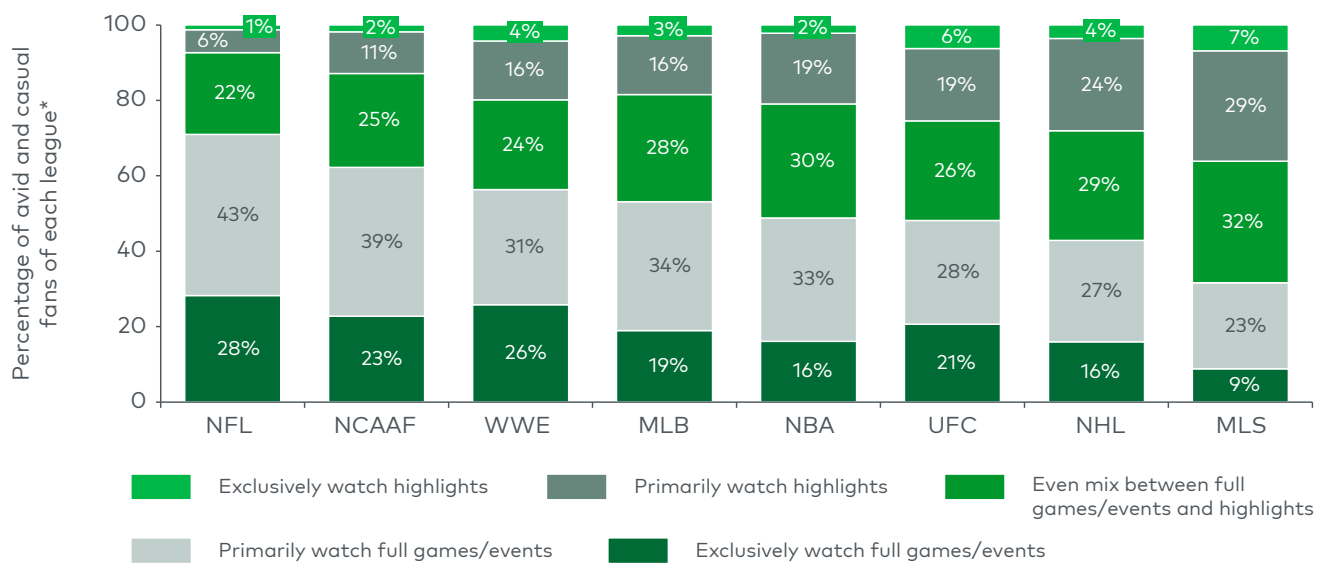
Age-based differences in media consumption are stark. Younger fans tend to prefer social media, gaming and on-demand formats over traditional live broadcasts; older audiences still dedicate the majority of their viewing time to live sports events.

This fragmentation extends to viewing habits as well. NFL fans lead in full-game viewership, with 71% of fans primarily or exclusively watching full games. In contrast, only 32% of MLS fans fall into that category, with most favoring highlights or a mix of formats.

Age further shapes these preferences. Younger fans (ages 18-39) are significantly less likely than are older fans (40+) to primarily or exclusively watch full games. The largest gaps between the two age groups appear in World Wrestling Entertainment (18 percentage points), MLB (17 percentage points), and NCAA football and NHL (13 percentage points each), highlighting a generational shift toward highlight-driven formats (see Figure 10).

Figure 10

Watching preferences, by sports league



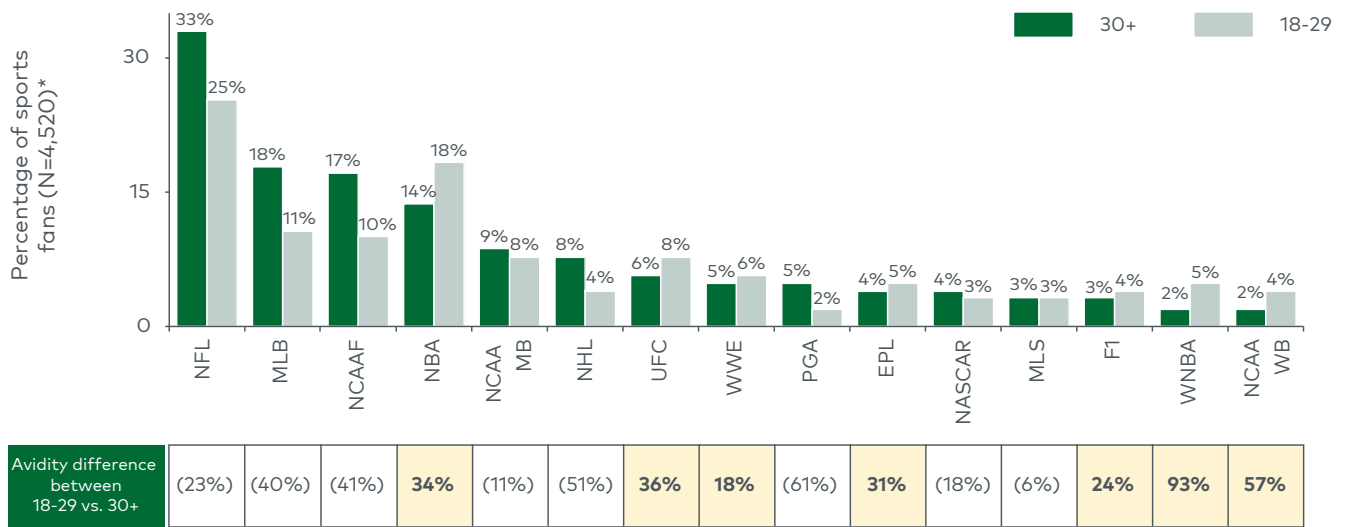
*Survey question: For each sports league listed below, please indicate the relative proportion of your time spent watching live games/events vs. clips/highlights
 Note: NFL leads in full-game viewership while other leagues skew toward highlights; NCAAF=NCAA Football; WWE=World Wrestling Entertainment
 Source: L.E.K. Consulting 2025 Sports Survey

Most notable is the stark contrast in league preferences between age groups. The NFL remains the most popular league across all demographics, but its avid fan incidence is 8 percentage points lower among fans ages 18-29 compared to those over 30. In contrast, younger fans show higher levels of avidity for leagues like the NBA (18% among 18-29 versus 14% among 30+), UFC (8% versus 6%) and WNBA (5% versus 2%).

These differences suggest that leagues with stronger digital engagement and social media presence are resonating more with the next generation of fans (see Figure 11).

Figure 11

Avid fan incidence by sport (top 15 sports by avid incidence), age 18-29 vs. 30+ (January 2025)



*Survey questions: What is your age? How interested are you in the following sports leagues?

Note: Younger fans show higher interest in NBA, UFC, WWE and women's basketball; NFL=National Football League; MLB=Major League Baseball; NCAAF=NCAA Football; NCAA MB=NCAA Men's Basketball; WWE=World Wrestling Entertainment; EPL=English Premier League; F1=Formula 1; WNBA=Women's National Basketball Association; NCAA WB=NCAA Women's Basketball

Source: L.E.K. Consulting 2025 Sports Survey

Meeting the next generation of fans

These evolving consumption patterns, combined with changing demographics and media landscapes, point to a future that's more diverse, more digital and more fragmented. The growth of women's sports, the rise of global leagues like EPL and F1, and the expanding definition of engagement are all reshaping what it means to be a sports fan.

To remain relevant, leagues and media partners must adapt by delivering shorter formats optimized for digital platforms, creating interactive social media touchpoints and developing mobile-first engagement strategies that complement traditional broadcasts. Properties that invest in star development, particularly among female athletes, stand to gain significant ground with the next generation. Our data clearly shows that the next generation isn't abandoning sports; they're simply engaging on their own terms.

About L.E.K. Consulting's Sports practice

L.E.K. Consulting brings 40+ years of strategy experience to the sports industry. Our dedicated Sports practice works with leagues, broadcasters and platforms to deliver actionable strategies in media rights, audience segmentation and digital transformation. With a global team of 2,200+ professionals across 22 offices, we provide the analytical rigor needed to navigate industry shifts — from the surge in women's sports to changing media consumption patterns.

For more detailed insights or to discuss how these findings might impact your organization, please [contact us](#).

Endnotes

¹ESPN.com, "WNBA secures 'monumental' media deal with Disney, Amazon, NBCU." https://www.espn.com/wnba/story/_/id/40634341/wnba-secures-monumental-media-deal-disney-amazon-nbcu

²Sportspro.com, "NWSL 'targets' further media revenues with fifth domestic broadcast package." <https://www.sportspro.com/news/nwsl-domestic-tv-rights-package-broadcast-2026-april-2025/>

³ESPNpressroom.com, "The 2024 WNBA season delivers record viewership across ESPN platforms." <https://espnpressroom.com/us/press-releases/2024/10/the-2024-wnba-season-delivers-record-viewership-across-espn-platforms/>

⁴LEK.com, "The Streaming War for National Sports Rights." <https://www.lek.com/insights/tmt/us/ei/streaming-war-national-sports-rights>

About the Authors



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