Nielsen
Tops of Sports
Media trends shaping sports marketing for 2026

Introduction

From the initial whistle to the final buzzer, sports captivate our hearts and attention. 2025 proved to be monumental for sports, with significant events across the globe and within the U.S.

Globally, soccer dominated headlines with The FIFA Club World Cup 25™ held in the U.S. and the UEFA European Women's Championship. Women's sports continued their rise in prominence, featuring major tournaments like the Women's Rugby World Cup and the Women's Cricket World Cup.

In the U.S., major leagues kept fans engaged. Super Bowl LIX made history by attracting over 127 million viewers, marking a new record for television viewership. October 27th also brought a rare "sports equinox," where games from five different leagues—MLB, NFL, NHL, NBA, and MLS—all took place on the same day. This intense fan engagement, coupled with streaming's evolving role in how viewers tune in, has fueled a fierce competition for TV rights.

To thrive in today's competitive global sports market, brand sponsors, advertisers, media rights holders, and leagues and teams need to understand the drivers of fan behavior in 2025 to effectively plan for key sporting moments in 2026.

We analyzed the major trends that shaped the U.S. sports media landscape in 2025 to better understand how sports connect fans, platforms and brands. These insights will be crucial for making smarter sports marketing decisions in the coming year.

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Top sports media trends from 2025

Streaming is evolving how sports are delivered and consumed, keeping fan attention for longer than ever before

Sports viewers and fanbases are growing, unlocking pathways for brand sponsors to tap into new, diverse fandoms

Brand sponsors have valuable opportunities to maximize exposure and earn trust with highly engaged fans

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Multi-platform success: Linear and streaming attract different but complimentary audiences

Live sports remains a powerful driver of audience engagement. Insights from The Gauge in September 2025 further solidifies this, where the return of football generated a big spike in broadcast television,increasing viewership by 20% month-over-month.

And live sports are not just the purview of broadcast and cable television anymore, with an increasing share of rights going to streaming. 2025 saw major deals between F1 and Apple, as well as UFC and Paramount, for example.

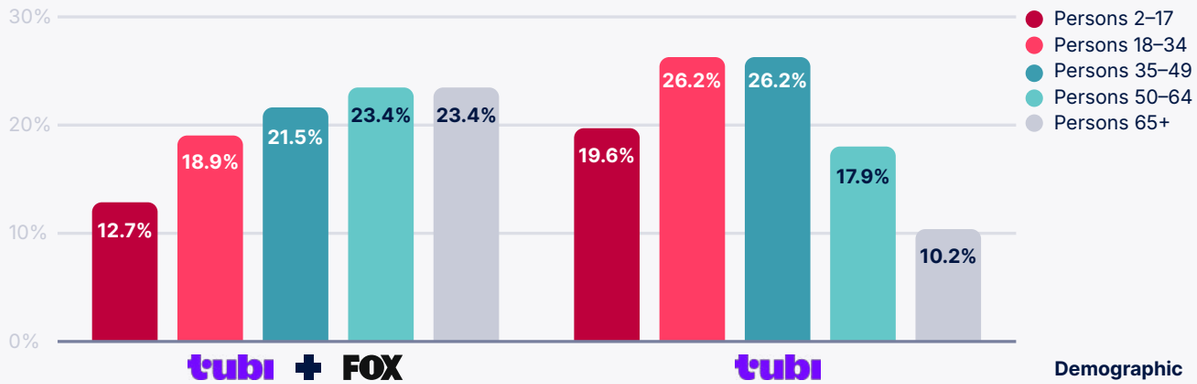
But rather than exclusivity, data trends from this year shows the biggest opportunity is in airing games across both linear and streaming. Consider FOX's highly successful decision to carry the *Super Bowl* on its free streaming service Tubi this past February. Tubi attracted a younger, complimentary audience relative to the FOX broadcast, creating a whole new set of opportunities for brands.

We similarly observed these complimentary viewer acquisition patterns in audience distribution for NBC's *Sunday Night Football* on the broadcast network and on streaming on Peacock. These two examples underscore the effectiveness of how multi-platform strategies are maximizing the impact and reach of live sports.

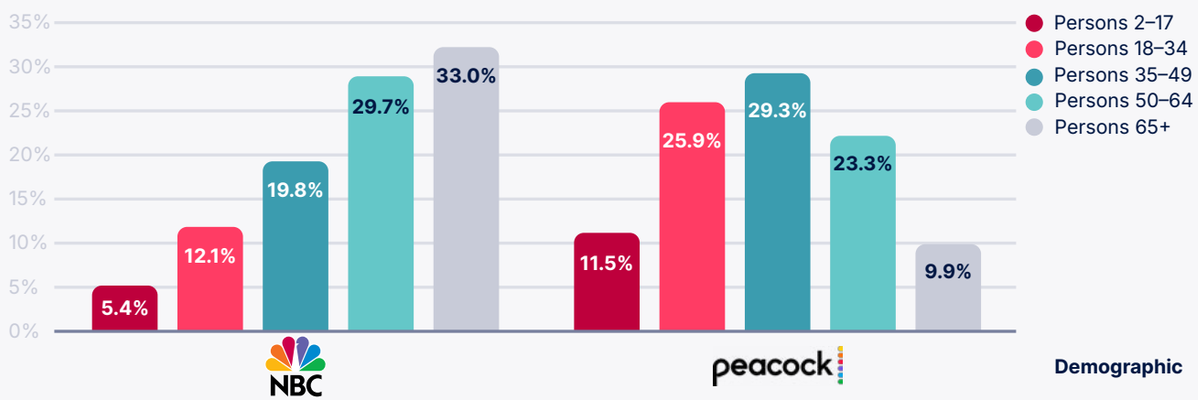
Figure 1

The Tubi Super Bowl experiment: A victory on multiple fronts

2025 Super Bowl audience composition comparison



NFL Sunday Night Football audience composition (NBC and Peacock)



Source: Nielsen National Panel and Streaming Platform Ratings Tubi audience composition includes total Tubi usage, not just Super Bowl viewing, Nielsen National Television Panel (NBC), Streaming Platform Ratings, (Peacock)

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Streaming sports documentaries create a new avenue for engagement

In 2019, Netflix released the first season of documentary series *Formula 1: Drive to Survive*. Since then, the average audience for Formula 1 Gran Prix races on Disney linear networks have more than doubled. While the documentary series may not be the sole reason for that increased interest, it would be hard to argue it didn't have an impact.

While sports documentaries weren't a new phenomenon in 2019, streaming created a veritable warehouse for fans to engage with these films and shows as much as they wanted. And seeing the halo effect *Drive to Survive* had, more and more content became available.

Total viewing for streaming sports documentaries reached 16,937 million minutes in 2024, up from 4,709 million in 2021. And viewing in 2025 is on pace to finish with a similar total.

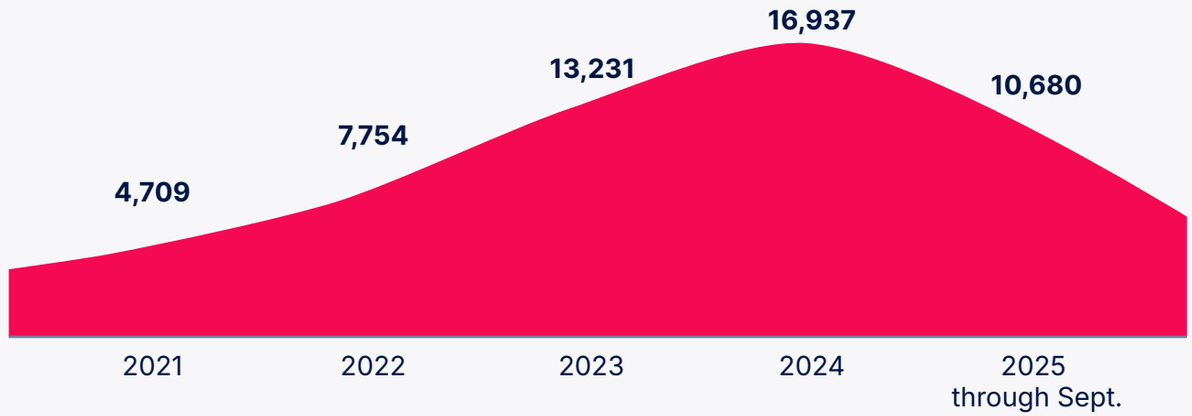
And we're starting to see this impact extend to the scripted world as well. 2025 saw the release of F1 starring Brad Pitt as a Formula 1 driver. Apple's biggest theatrical hit to date and Pitt's highest grossing film ever, the movie will be available to stream on Apple TV+ in December.

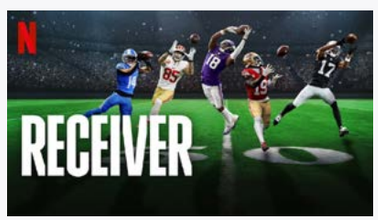
Beyond viewership, we can see how Formula 1's fanbase has incrementally grown since October 2023 in the U.S. as well.

Figure 2

Growing slate of streaming sports docs give fans new ways to engage

Total viewing minutes (in millions) sports documentaries





Source: Nielsen Streaming Content Ratings, 2025 through September
Nielsen Fan Insights

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Soccer builds momentum into 2026

Soccer by far is the most popular sport globally, with 51% of people on average saying they're fans. However, just 27% of Americans identify as fans.

Nonetheless, viewing of international soccer tournaments in the U.S. has been on the rise. Last year, the average audience for Copa América more than doubled compared to 2021, and this year, both the UEFA Women's Euro and the CONCACAF Gold Cup saw significant increases. The brand new format of the FIFA Club World Cup 25™ was also held this year, and the fact that both it and the Gold Cup held matches in the U.S. likely helped boost interest.

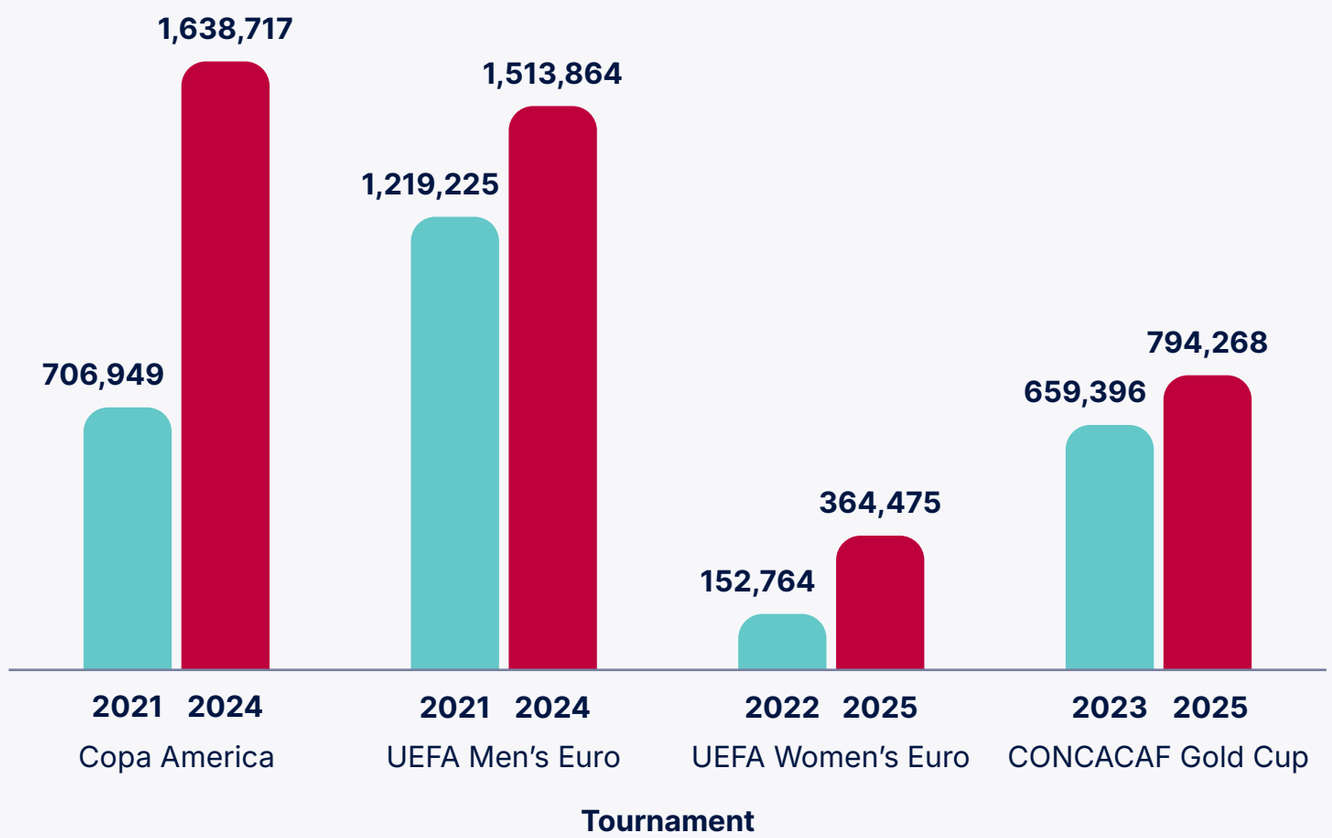
In fact, 37% of the general population in the U.S. expect their interest in the sport to increase over the next 18 months.

This is good news as the FIFA World Cup 26™ approaches. With games to be hosted across North America, including several major U.S. cities, World Cup fans plan to immerse themselves fully in the event, both inside and outside the stadiums.

Figure 3

U.S. viewing to international soccer tournaments has been growing

International soccer tournaments
average total viewers in millions



Source: Nielsen national TV ratings, live+SD, big data + panel for 2025, panel-only for prior years. Includes both English and Spanish language coverage

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The MLB Postseason is boosting diverse baseball viewership

In a nail-biter game seven of the World Series this year, the L.A. Dodgers clinched Major League Baseball's World Series for the second year in a row. This marked the end of a playoff season that notched 58.2 billion viewing minutes, up 24% from the prior year.

Dodgers star and 2024 National League MVP Shohei Ohtani, nicknamed "Sho-time," not only helped win the series. He's also attracting broader audiences for the MLB. From a cultural perspective, excitement around Ohtani's star status has helped to boost Asian viewership by 23% across the MLB Postseason.

Ohtani and the Dodgers' influence was also evident during the 2025 MLB Tokyo Series where Asian American viewership increased 113% compared to the 2024 Seoul Series. Black, Hispanic and total audiences also grew their viewing for this international event, year-over-year, increasing 111%, more than 200% and 107%, respectively.

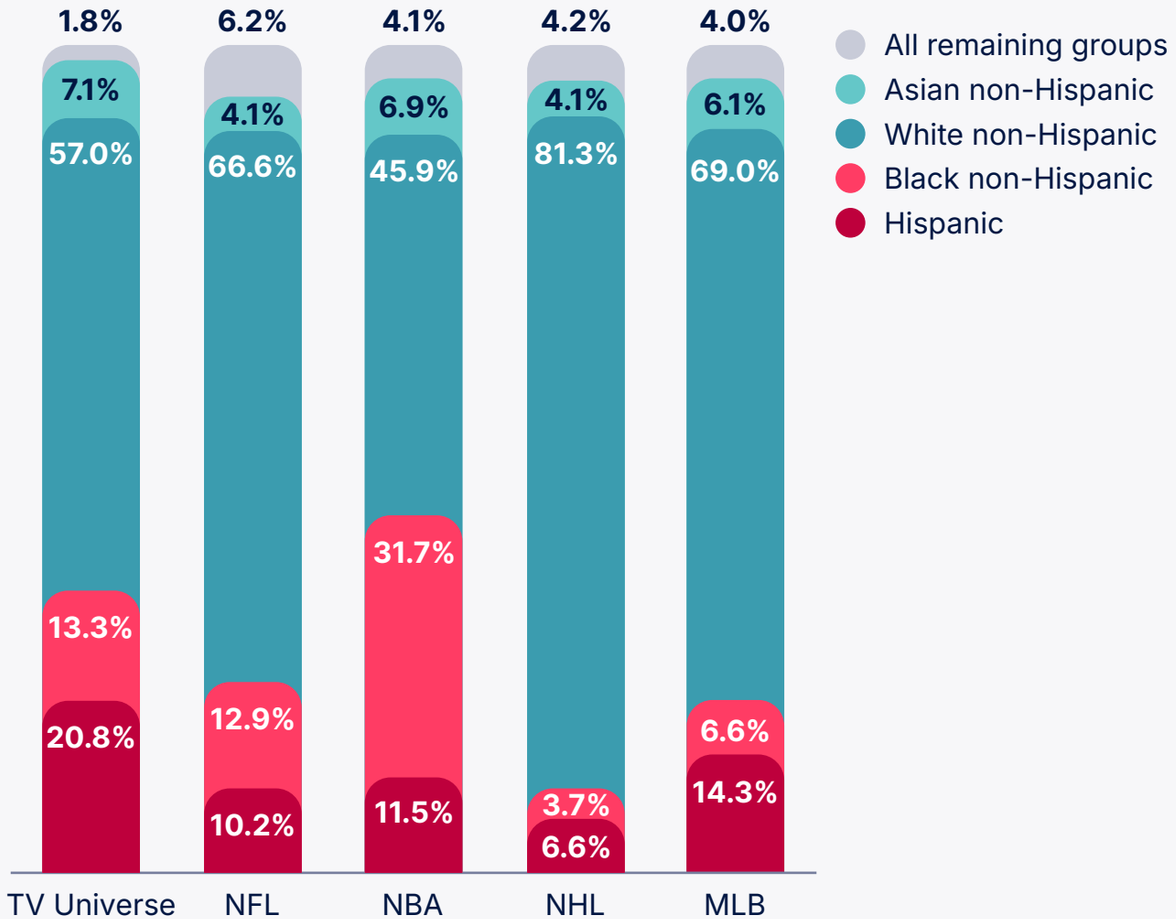
This year's MLB season ending on a strong note overall has helped to attract energized and diverse audiences. For example, the 2025 MLB Postseason attracted the highest percentage of Hispanic viewers (14.3%) out of all major pro sports, and the overall MLB audience composition of Asian audiences grew to 6.1% this year—an increase from 5.8% in 2024.

For brands, networks and advertisers, this is a moment to reimagine the fanbase—not as a static demographic segment, but as an evolving cultural force.

Figure 4

The MLB Postseason is gaining diverse viewership with Hispanic and Asian audiences

Audience composition, postseason for major sports



Source: Nielsen national TV ratings, live+SD, most recent postseason for each sport., panel-only.

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Women's sports continue to grow fanbases

2025 again saw women's sports grab headlines—a trend that we've seen over the past few years. In the U.S., leagues like the National Women's Soccer League (NWSL), WNBA and NCAA Women's Softball all saw viewership increase year-over-year.

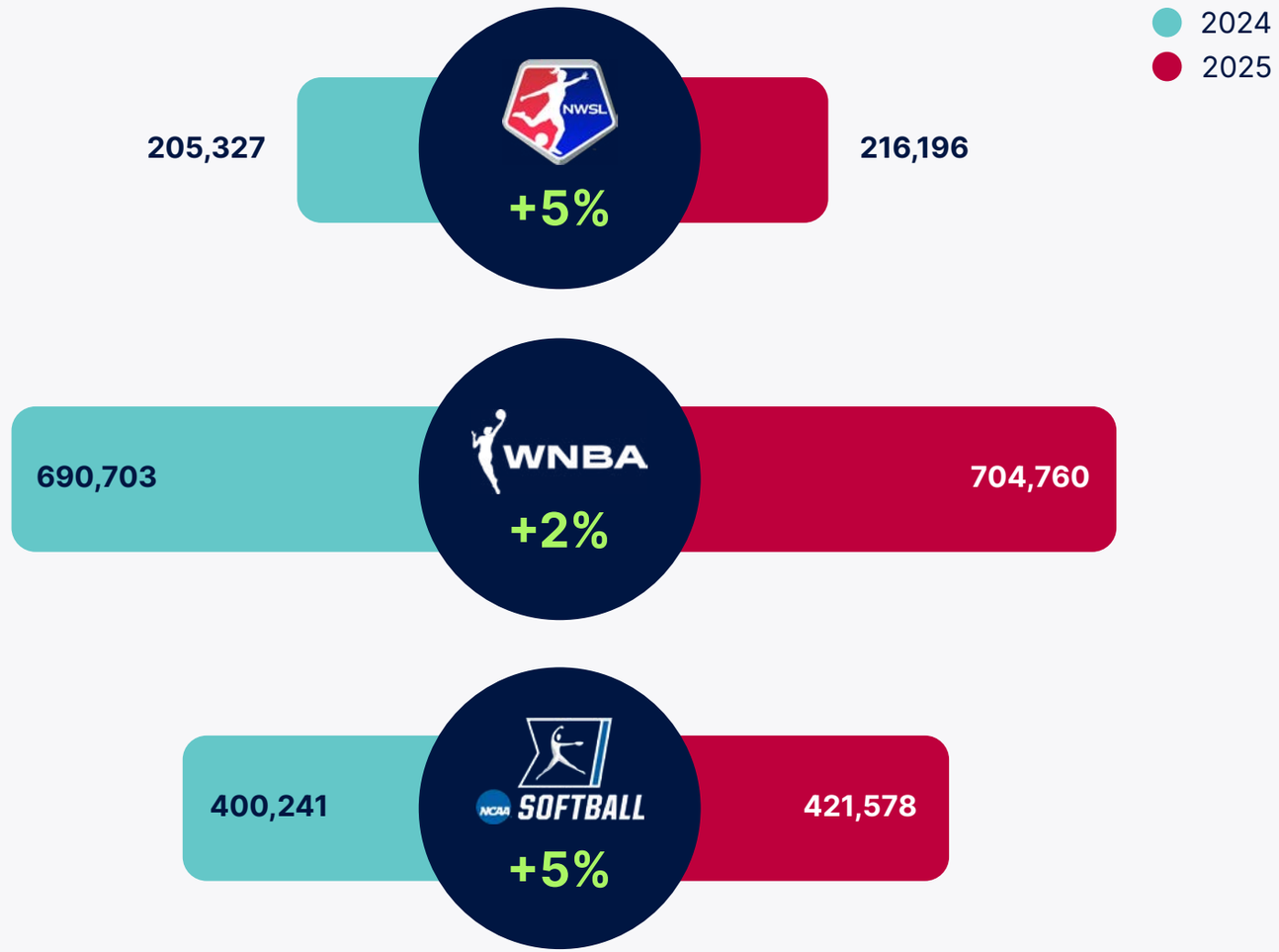
The NWSL, in particular, saw a 5% increase in viewership. And their fanbase is also growing. The league has 39.3 million fans this year, up from 30.8 million in 2023. Further insights reveal that currently 64% of NWSL's fans are men, but overall for female sports, women are increasingly trending toward making up a growing share of these fanbases.

In 2024, women represented 47% of fans of women's sports, up from 45% in 2022[1]. In fact, a recent case study projected that 60% of women's football fans globally will be female by 2030—becoming one of the few sports where women represent a majority audience.

This year also saw two major international tournaments for women's rugby and cricket, which have seen female fans of the women's leagues of these sports increase.

Figure 5

Women's sports gain traction with U.S. viewers



Source: Nielsen big data + panel, total average viewers of live events across all networks

[1] Nielsen fan insights, 2022 - 2024 (Brazil, China, France, Germany, India, Italy, Japan, South Korea, U.K., U.S.)

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Basketball delivers on brand sponsorship media value

In total, the top 10 most valuable sports team sponsorship assets delivered almost $515 million in media value for brands in 2025. Many of these opportunities in terms of sports sponsorship value came from the NBA, followed by the MLB.

Much of this reflects the amount of airtime NBA and MLB sponsorships get due to the amount of games played. For example, the NBA includes 1,230 regular season games compared to the NFL's 272 regular season games—approximately 4.5x more opportunities for brand exposure. National and local programming hours across a full season for each sport clock in at 7,121 hours for the MLB, 3,313 hours for the NBA, and 442 hours for the NFL.[2] As a result, NBA court signage and MLB jersey patches are some of the most valuable team partnerships within sports.

Importantly, the NBA postseason has the highest concentration of Black (31.7% of NBA total) and Asian (6.9% of NBA total) viewers among the major sports. These are critical growth audiences for brands.

And as women's sports grow in popularity, especially among women, these sports are offering new brand sponsorship opportunities. For example, luxury brand Coach recently became the official handbag partner of the WNBA—a segment where women's team sports fans are 44% more likely to buy than the general population.[2]

Figure 6

Brand	Team	League	Sponsorship type and location	QI media value	QI Impressions (000s)
Guggenheim Partners	Los Angeles Dodgers	MLB	Player Kit Jersey Sleeve	$80,349,884	3,098,069
TD Bank	Toronto Blue Jays	MLB	Player Kit Jersey Sleeve	$79,201,341	4,175,927
Paycom	Oklahoma City Thunder	NBA	On Surface Branding	$69,593,768	3,256,590
Gainbridge	Indiana Pacers	NBA	On Surface Branding	$52,410,244	2,438,562
Chase	New York Knicks	NBA	On Surface Branding	$49,145,751	2,247,697
Security Benefit	Los Angeles Dodgers	MLB	Static Board Field Level Home Plate	$44,109,102	1,699,864
Starr Insurance	New York Yankees	MLB	Player Kit Jersey Sleeve	$38,323,481	1,354,377
Chase	Golden State Warriors	NBA	On Surface Branding	$36,867,364	1,661,327
Crypto.com	Los Angeles Lakers	NBA	On Surface Branding	$33,697,412	1,423,734
TD Bank	Boston Celtics	NBA	On Surface Branding	$31,364,404	1,409,841

[2] Nielsen National TV Ratings, Nielsen Local TV Ratings
(NFL 2024-25 9/5/24 - 2/9/25, NBA 10/22/24 - 6/22/25, MLB 3/27/25 - 11/1/25)

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Golf is in the green with growing audiences

2025 was a notable year for the sport of golf in general as TGL, a new interactive, tech-infused golf league rushed onto the scene. TGL fans grew 17% during the first few months of the year, and these fans are younger than overall golf fans.

And Netflix's golf comedy *Happy Gilmore 2* made waves by setting a new single-week streaming movie record, racking up 2.89 billion viewing minutes in its first few days of availability. Notably, a number of golf pros made cameos in the film.

Despite new competition, the PGA Tour also saw its viewership increase 10% this year compared to 2024. Even excluding broadcast, live coverage on the Golf Channel was up 8% among total viewers.

Two of the four "Majors" saw year-over-year increases, and all three of the events that make up the FedEx Cup Playoffs also got a bump. While we can't prove a direct relationship, it's worth pointing out that the FedEx Cup events took place after *Happy Gilmore 2*'s release at the end of July.

With the growing attention on golf, brands have the opportunity to connect with fans who are eager to support those sponsoring the game. U.S. golf fans are more likely than U.S. sports fans overall to lean in with brand sponsors.

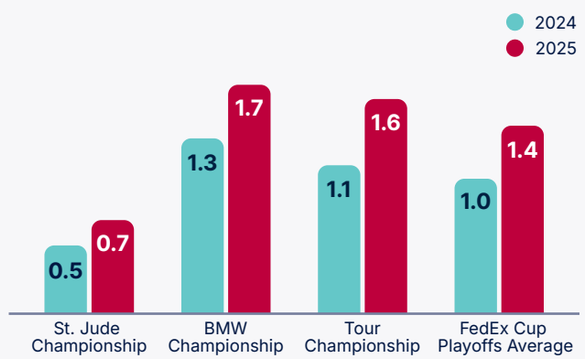
Figure 7

Golf fans in the U.S. lean in with brand sponsors

	U.S. golf fans	U.S. sports fans overall
I agree companies involved in sponsoring sport gain in appeal with the audience	72%	66%
I actively inform myself about brands engaged as a sponsor in sport	59%	46%
I would choose a sponsor's product rather than rival brands if price and quality were the same	64%	55%
I agree companies that engage in sponsorship show that they are trustworthy	52%	40%

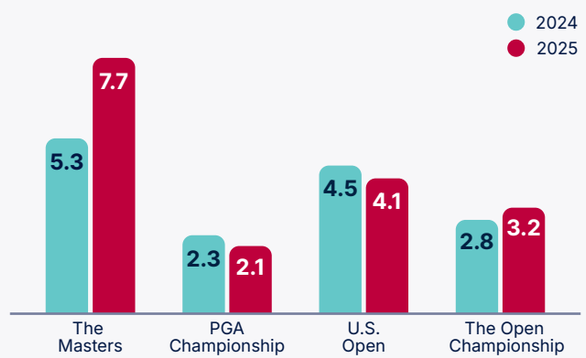
The FedEx Cup Playoffs were up across-the-board

FedEx cup playoff events
Average total viewers in millions



Two of the four major PGA tournaments saw viewer gains this year

PGA tour major events
Average total viewers in millions



Source: Nielsen Fan Insights, June 2024-June 2025
Nielsen National TV Ratings, Live+SD, Big Data + Panel

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Game plan for 2026

The year ahead is poised to be an eventful one for sports with major moments from the Milano Cortina 2026 Winter Olympics and the FIFA World Cup 26™. Success will hinge on embracing innovation, prioritizing fan engagement and understanding the evolving media landscape. Then you'll be able to unlock the full potential of sports marketing in a year filled with monumental sporting moments.

For brands

- With sports reaching wider, diverse audiences—consider unique, culturally relevant partnerships that go beyond traditional advertising. Leveraging the narratives of key sports events can build deeper connections with fans from different backgrounds.
- A multi-platform content strategy that integrates influencer marketing and interactive digital experiences will be crucial for capturing attention across various viewing habits and demographics and gaining high-value exposure.
- Find authentic moments to tap into fan excitement. Sports fans are more intensely engaged than ever and on average perceive sports brand sponsors more positively than the general population. Fans of soccer, golf, and women's sports, for example, are more receptive with brand sponsors and are more likely to purchase brand sponsor products over rivals.

For rights holders

- Optimize distribution strategies to cater to evolving consumption patterns. Granular data-driven insights into fan demographics and preferences will be essential for tailoring relevant experiences.
- Use advanced analytics to better understand audience behavior, informing content delivery and unlocking new revenue streams. Keep fans engaged even when the season is over with sports documentaries, scripted films, and libraries of on-demand sports content that can have a lasting impact on sports viewership.
- Leverage multi-platform viewing as a winning strategy for live sports to make it easier to be a fan anywhere. Combining linear and streaming for live events—over exclusivity—maximizes not only total audience, but expands the depth of audience demographics that may not have been reached otherwise.

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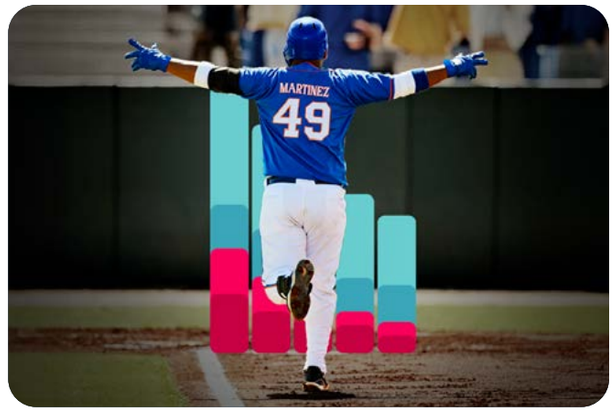
How Nielsen can help

As a global leader in sports audience measurement, sponsorship analytics and fan intelligence, Nielsen can help you understand how audiences are watching and connect with the fans that matter most.



Understand sports viewing trends	Discover key fan insights	Drive sponsorship ROI	Unlock your true media value
Nielsen audience measurement provides accurate, real-time insights into who's watching, listening, and engaging with sports moments across platforms.	Nielsen Fan Insights measures how fans are engaging with their favorite sports, giving teams and leagues more powerful insights into what fans expect and how brands can best allocate their sponsorship spend.	Nielsen's sponsorship analytics provide the insights you need to optimize sponsorship activation and drive ROI thanks to partnership performance measurement across the entire portfolio.	Nielsen's media valuation data helps you optimize sports sponsorship by measuring the total value of brand exposures across channels. Know what's working, what's not and when to adjust.

Contact us to learn more

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About Nielsen

Nielsen is a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their global audiences—now and into the future.

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