Adlook

RESEARCH REPORT

World Cup

Digital Audience Behavior Study

Cross-Market Analysis (6 Countries)

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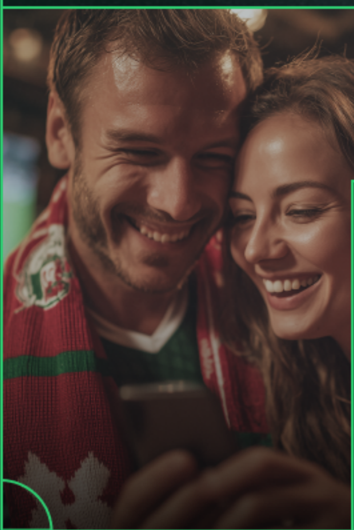

MARKETS COVERED

SOURCE

Adlook Research

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CEO Foreword

Football is one of the few things left that genuinely stops people in their tracks. For a few weeks every four years, it brings together audiences that no other content format can match, people who do not usually watch sport, families gathered around a single screen, viewers who disappear the moment their team does.

That is not a detail, it is central to how these audiences behave and how they should be approached.

And yet, most media planning still treats these audiences as homogeneous, as fans by default. The assumption is simple: if someone is watching, they care. Attention is treated as interest, and the person in front of the screen is assumed to be exactly who you think they are.

This report challenges that assumption.

What the data shows is that a large share of tournament audiences are not core fans. **They are casual viewers, present for the moment, not the sport.** They watch differently, behave differently, and leave at different stages of the competition. If planning does not account for this, it is built on an incomplete view of reality.

This distinction matters because **behavior is more actionable than assumed identity.** Knowing that someone is watching tells you very little. Knowing how they are watching, whether they are focused or multitasking, browsing or engaged, present or about to disappear, creates a far clearer basis for decision-making.

This is not about redefining audiences. It is about observing how they actually behave, and what that means for advertising.

And once you see it, the opportunity looks very different.

Kuba Kossut
Global CEO, Adlook

Executive Summary

This report presents findings from the 2025 Global Football Tournament Audience Behavior Study conducted by Adlook across six markets: Brazil, UK, France, Mexico, Poland, and the United States, based on a survey of 33,561 respondents conducted between December 10 and December 18, 2025.

The analysis is designed to support advertisers and media planners in programmatic environments, helping them understand how large global sports events influence audience behaviour across digital channels and advertising touchpoints.

The study examined:

- self-reported viewing habits,
- device preferences,
- in-match secondary behaviors, and
- post-elimination viewing intentions,

enabling segmentation of the tournament audience into two primary groups: Casual Viewers and Core Fans.

Across all six markets, Casual Viewers constitute the majority of the tournament audience as defined by this study, ranging from 56% (UK) to 69% (United States). Core Fans — respondents who watch football regularly and follow the tournament throughout — represent the remaining share of tournament viewers, typically the balance after Casual Viewers are accounted for.

The two segments differ in reported focus levels, secondary digital activities, and post-elimination viewing intentions. Casual Viewers report higher broadcast focus and higher browsing and shopping activity while watching matches, relative to Core Fans. Core Fans report higher usage of sports-specific applications in real time and higher continuation rates after national team elimination.

Cross-market variation is recorded across several dimensions: the United States records a lower broadcast TV share and a higher combined streaming share than the other five markets; Poland records a higher proportion of Casual Viewers aged 45 or older than the other markets; France records a higher non-engagement rate than the other markets; and Mexico records a higher food and drink delivery rate during matches than the other markets. UK's Casual Viewer segment records a larger browse/shop propensity differential relative to Core Fans (+47%) than the other markets. All cross-market comparisons are directional; sample sizes are undisclosed and findings should be treated as indicative rather than statistically tested.

KEY METRICS AT A GLANCE

Country	Casual Viewers (% of tournament audience)	Casual Viewer Focus Uplift vs Core Fans	In-Match Browsing & Shopping Activity Uplift vs Core Fans	Post-Elimination Drop-off Rate	Core Fan Retention After Elimination	Core Fan Multitasking Rate	Core Fan Online Viewing Share (Streaming)
Brazil	61%	+7%	+24%	59%	65%	64%	39%
UK	56%	+4%	+47%	48%	73%	54%	16%
France	65%	+7%	+51%	58%	69%	42%	31%
Mexico	66%	+15%	+26%	49%	73%	61%	44%
Poland	68%	+6%	+10%	48%	77%	44%	25%
United States	69%	+12%	+31%	55%	60%	61%	51%

All metrics are based on self-reported behaviours and are relevant for programmatic advertising and media activation.

METRIC GLOSSARY

Casual Viewers (% of tournament audience)

The share of tournament-viewing respondents in each market who identify as non-habitual football followers, i.e. they watch the tournament but do not regularly follow football. Expressed as a percentage of all respondents who watch the tournament.

Casual Viewer Focus Uplift vs Core Fans

The percentage point difference in reported full broadcast focus between Casual Viewers and Core Fans. A positive value indicates that Casual Viewers in that market are more likely to report being fully focused on the broadcast during a match than Core Fans.

In-Match Browsing & Shopping Activity Uplift vs Core Fans

The relative uplift in reported online browsing and shopping activity during matches among Casual Viewers compared to Core Fans. Expressed as a percentage indexed against the Core Fan rate for that market.

Post-Elimination Drop-off Rate

The proportion of Casual Viewers in each market who report they would stop watching the tournament after their national team is eliminated. Based on stated pre-tournament intentions; actual behaviour may differ.

Core Fan Retention After Elimination

The proportion of Core Fans in each market who report they would continue watching the tournament after their national team is eliminated. Based on stated pre-tournament intentions; actual behaviour may differ.

Core Fan Multitasking Rate

The proportion of Core Fans who report engaging in a secondary activity while watching matches. Secondary activities include checking scores, using statistics or betting applications, social messaging, browsing, and food or drink ordering.

Core Fan Online Viewing Share (Streaming)

The proportion of Core Fans who report watching tournament matches primarily via an online or streaming platform — including smart TV streaming, laptop or desktop, or smartphone or tablet. Excludes traditional broadcast television and public venue viewing.

Methodological Note

The data in this report originates from the 2025 World Cup Digital Audience Behavior Study, conducted by Adlook, surveying 33,561 respondents between December 10 and December 18, 2025. Each country-level dataset is derived from an independent survey sample for that market. The study covered six countries: Brazil, UK, France, Mexico, Poland, and the United States.

SAMPLE SIZE BY MARKET

The total sample of 33,561 respondents was distributed across the six markets as follows:

Market	Respondents (n)	% of Total Sample
Brazil	6,092	18.2%
United Kingdom	5,844	17.4%
France	6,916	20.6%
Mexico	5,367	16.0%
Poland	5,605	16.7%
United States	3,737	11.1%
Total	**33,561**	**100%**

Each market was surveyed independently. Sample sizes vary by market and reflect the study's research design. Cross-market comparisons should be interpreted directionally; no statistical significance testing has been applied.

SURVEY INSTRUMENT

Respondents were asked to answer the following question areas:

- Football and 2026 tournament viewing habits (regular viewer, occasional viewer, tournament-only viewer, non-viewer)
- Primary method for watching 2026 tournament matches (broadcast TV, streaming smart TV, streaming laptop/desktop, streaming smartphone/tablet, public venue)
- Most common in-match secondary activity (social/messaging, food/drink delivery, scores/betting apps, browsing/shopping, none)

- Intention to continue watching after the national team's elimination (yes, no, not sure)
- Gender (female, male, other/prefer not to say)
- Age band (18-28, 29-34, 35-44, 45-60, 61+)

SEGMENT DEFINITIONS

Respondents are classified into two primary segments based on their self-reported football viewing habit:

Casual Viewers

Respondents who do not regularly follow football but watch the tournament. This segment is defined by tournament-only or non-habitual engagement with the sport.

Core Fans

Respondents who indicated they watch football regularly, including the 2026 World Cup. This segment is defined by consistent, ongoing football engagement.

Within each country dataset, differences between segments are reported as absolute percentage figures (the distribution within each segment) and as relative differentials (percentage uplift or decline versus the all-viewer average for that country).

The 2026 Tournament as a Behavioral Moment

In all six markets surveyed, respondents classified as non-habitual football viewers — those who watch the tournament but do not regularly follow football — constitute the majority of the tournament audience as measured by self-reported viewing habits.

Across the six markets, between 18.1% (Poland) and 24.4% (Brazil) of respondents describe themselves as people who do not usually watch football but do watch the tournament. A further 16.0%-25.2% watch football occasionally. Together, these groups constitute the majority of tournament-viewing respondents in each market. This pattern is recorded across all six markets surveyed.

Respondents in this non-habitual category report higher broadcast focus, higher browsing and shopping activity, and higher rates of intending to stop watching after national team elimination than habitual football followers. These patterns are described in detail in the Casual Viewers and Core Fans sections that follow.

AUDIENCE COMPOSITION: NON-VIEWERS

A meaningful share of surveyed respondents in each market indicates they do not watch the tournament. This non-viewer population ranges from 25.1% in Brazil to 48.4% in the United States. The variation across markets is substantial and constitutes a material consideration for reach estimation in tournament-adjacent campaigns.

In markets with high non-viewer rates — particularly the United States (48.4%) and France (44.3%) — tournament audiences represent a smaller proportion of the total survey population than in markets such as Brazil (25.1%) or Mexico (34.9%).

These differences may reflect varying levels of general interest in football across markets; however, this interpretation is indicative and not directly measured within the study.

Casual Viewers and Core Fans: Comparative Analysis

The study segments respondents into two groups based on self-reported football viewing habit. The behavioral differences between these groups, as recorded in the survey data, are described in this section. All comparisons are based on reported behaviors and stated intentions; no causal relationships are asserted.

The following table presents a cross-market synthesis of the key reported differences between the two segments.

Dimension	Casual Viewers	Core Fans
Share of audience	56%–69% across markets	Roughly 25%–44% (balance of tournament viewers)
Viewing habit classification	Tournament-only or non-regular football viewer	Regular football viewer who also watches the tournament
Tournament loyalty	Team-dependent; 48%–59% drop off after national elimination	77% (Poland) to 60% (US) continue regardless of national team
Primary viewing screen	Predominantly broadcast TV or large screen	Broadcast TV remains primary but with higher multi-screen activity
Online viewing share	Lower online propensity	16% (UK) to 51% (US) watch via streaming/mobile
Focus while watching	+4% to +15% more likely to be fully focused than core fans	High engagement but split attention across devices
Second-screen commerce	More likely to browse/shop: +10% to +51% uplift vs. core fans	Less likely to browse; more likely to check scores, stats, betting apps
Age profile	Skews older: 39%–68% aged 45+	Younger and more evenly distributed
Gender profile	Female over-representation relative to each market's overall sample (e.g. +133% in Poland, +90% in the UK), without indicating a higher absolute share than men	More male-skewed across all markets
Core multitasking	Minimal sport-related second screen	+3% to +9% more likely to use sports/scores/betting apps

VIEWING FOCUS

Across all six markets, Casual Viewers are reported to be more likely than Core Fans to be fully focused on the broadcast during the match. The uplift ranges from +4% (UK) to +15% (Mexico). Concurrently, Core Fans report higher rates of secondary digital activity during matches — including scores, statistics, and betting applications The data do not establish a causal relationship between second-screen activity and reported focus levels; both patterns are recorded directionally across all six markets.

COMMERCE AND SECONDARY DIGITAL BEHAVIOR

Casual Viewers show a consistent uplift in reported online browsing and shopping relative to Core Fans across all six markets, ranging from +10% (Poland) to +51% (France). Core Fans, by contrast, report higher use of sports-specific applications — scores, statistics, and betting — during matches. Casual Viewers report browsing and shopping as a more common secondary activity; Core Fans report sports-specific applications as a more common secondary activity.

These patterns are based on single-choice responses to a question about the most common in-match activity, which captures only the primary behavior per respondent. The data should not be interpreted as precluding other behaviors, nor as evidence that browsing/shopping or sports-app usage is exclusive to one segment.

POST-ELIMINATION STATED INTENTIONS

Casual Viewers report higher rates of intending to stop watching following their national team's elimination, ranging from 48% (Poland and UK) to 59% (Brazil) across the six markets. Core Fans report higher continuation rates: between 60% (United States) and 77% (Poland) state they would continue watching regardless of national team performance. An additional share of Casual Viewers in each market report being unsure, which adds further uncertainty to post-elimination audience size projections.

These figures represent stated intentions collected prior to the tournament. Actual post-elimination viewing behavior may differ. The data indicate a directional divergence between the two segments, but the magnitude of actual audience change at elimination events cannot be precisely derived from pre-tournament survey responses.

Viewing Platform and Device Preferences

The primary method for watching tournament matches varies substantially across the six markets. The following table summarizes primary viewing method distributions across all respondents in each market.

Country	Broadcast TV	Streaming Smart TV	Laptop/Desk-top	Smartphone/ Tablet	Public Venue	Non-viewers
Brazil	47.4%	22%	9.4%	10.2%	11.1%	25.1%
UK	52.3%	17.6%	8.6%	9.2%	12.3%	34.1%
France	56.4%	11.9%	9.9%	9.8%	12.0%	44.3%
Mexico	40.5%	22.5%	11.0%	13.0%	13.0%	34.9%
Poland	66.6%	10.0%	8.2%	7.9%	7.2%	36.1%
United States	31.8%	28.2%	11.4%	14.7%	13.9%	48.4%

BROADCAST TELEVISION

Traditional broadcast television (including cable and satellite) is the primary viewing method reported by the largest share of respondents in five of the six markets. Poland records the highest concentration at 66.6% and the United States the lowest at 31.8%. The data do not support assigning a single explanatory factor to any market's viewing platform distribution.

The United States is the only market among the six analyzed where combined streaming and digital viewing (streaming smart TV: 28.2%; smartphone/tablet: 14.7%; laptop/desktop: 11.4% = 54.3%) exceeds traditional broadcast (31.8%). This is a pattern not observed in the other five markets studied.

STREAMING AND MULTI-PLATFORM VIEWING

Core Fans report higher online viewing propensity than Casual Viewers in all six markets, based on the segment-level data. The Core Fan online viewing share ranges from 16% (UK) to 51% (United States). Mexico (22.5% smart TV streaming across all respondents) and Brazil (22.0%) record higher smart TV streaming rates than the European markets across the six markets analyzed.

In-Match Behavior and Secondary Activities

The survey asked respondents to identify the activity they most often engage in while watching tournament matches. Each respondent selected a single most common activity. The results highlight both the substantial proportion of viewers who report no secondary activity and the distributional differences among those who do.

Country	Social/ Messaging	Food Delivery	Scores/Betting	Browse/Shop	None of these	Continue after elimination (Yes)
Brazil	19.1%	17.7%	14.8%	10.9%	37.5%	50.7%
UK	15.2%	13.3%	13.8%	10.6%	47.1%	61.2%
France	11.3%	9.0%	11.6%	8.2%	59.8%	52.4%
Mexico	15.0%	18.3%	12.3%	11.9%	42.5%	58.3%
Poland	9.3%	10.2%	10.3%	11.8%	58.4%	61.0%
United States	17.6%	14.2%	11.9%	13.9%	42.5%	50.2%

NON-MULTITASKING VIEWERS

The proportion of respondents reporting no measured secondary activity while watching ranges from 37.5% in Brazil to 59.8% in France. France (59.8%) and Poland (58.4%) record the highest non-multitasking rates among the six markets.

Both markets also show higher proportions of respondents aged 45 or older compared to the other four markets. These patterns co-occur, but the data do not establish a directional relationship between age and non-multitasking behaviour.

Brazil (37.5%), Mexico (42.5%), and the United States (42.5%) record lower non-multitasking rates than the other three markets. The basis for market-level differences in secondary activity rates cannot be determined from the available survey data.

SOCIAL MESSAGING

Social and messaging app usage during matches ranges from 9.3% (Poland) to 19.1% (Brazil). Brazil and the United States record higher rates than the other four markets; Poland and France record lower rates than the other four markets.

FOOD AND DRINK DELIVERY

Mexico records the highest in-match food and drink delivery rate at 18.3%, followed by Brazil (17.7%). These two markets record higher rates than the remaining four: the United States (14.2%), UK (13.3%), Poland (10.2%), and France (9.0%).

SPORTS SCORES AND BETTING

Score-checking and betting app usage is reported at 14.8% in Brazil and 13.8% in UK, above the rates in the other four markets. Poland records the lowest rate at 10.3%, despite recording one of the higher Core Fan proportions of the six markets. The relationship between Core Fan share and sports-app usage rates does not follow a uniform pattern across markets, and no explanation for this pattern can be derived from the survey data alone.

Strategic Implications for Advertisers

The following observations are derived from the survey data and are intended to identify planning considerations grounded in the reported behavioral patterns. They do not prescribe specific media approaches and should be read in the context of the methodological caveats set out earlier in this report.

IMPLICATION 1: THE TWO SEGMENTS ARE ASSOCIATED WITH DIFFERENT BEHAVIORAL PROFILES

The data indicate that Casual Viewers and Core Fans differ in their reported secondary activities during matches. Casual Viewers report higher broadcast focus and greater propensity for online browsing and shopping relative to Core Fans. Core Fans report higher use of sports-specific applications. These differences suggest that the two segments are not interchangeable from a behavioral standpoint.

The data also indicate that Casual Viewer engagement is more concentrated on national team fixtures, with a majority of Casual Viewers in each market stating they intend to stop watching after their national team's elimination. Core Fan engagement is reported to be distributed across the full tournament, irrespective of national team performance. These are stated intentions and may not correspond precisely to actual behavior.

IMPLICATION 2: POST-ELIMINATION AUDIENCE COMPOSITION SHIFTS DIRECTIONALLY

Across all six markets, Casual Viewers report higher rates of intending to stop watching after national team elimination (48%-59%) compared to Core Fans (23%-40% reporting they would stop). Based on stated intentions, the proportion of Core Fans within the remaining audience is higher after national team elimination than in the full-tournament audience. The precise scale of this shift cannot be quantified from stated-intention data alone.

IMPLICATION 3: PRIMARY VIEWING PLATFORM VARIES SUBSTANTIALLY BY MARKET

The survey data show material differences in primary viewing method across the six markets. Broadcast TV is the most commonly reported primary method in five of six markets, but its share ranges widely (31.8% in the United States to 66.6% in Poland). The United States is the only market where combined streaming across all platforms exceeds broadcast TV in this sample. These differences indicate that platform distribution varies materially by market across the six surveyed.

IMPLICATION 4: NON-VIEWER RATES AFFECT AUDIENCE SCALE

Survey respondents who report never watching the tournament range from 25.1% (Brazil) to 48.4% (United States). In markets with higher non-viewer proportions, the tournament audience represents a smaller share of the total survey population. This is a relevant variable when assessing proportional reach potential in each market.

IMPLICATION 5: REPORTED SECONDARY BEHAVIORS DIFFER BY SEGMENT

The survey data show that Casual Viewers report higher browsing and shopping activity (indexed uplift: +10% to +51% versus Core Fans depending on market), while Core Fans report higher use of scores, statistics, and betting applications. These are single-response self-reported data; they indicate directional segment-level propensity differences and should not be treated as definitive behavioral evidence.

Key Takeaways

The following points summarize the principal findings of the 2026 World Cup Digital Audience Behavior Study across the six markets analyzed in this report. All findings are based on self-reported survey data; cross-market comparisons are directional and not statistically tested.

ON AUDIENCE COMPOSITION

Casual Viewers — respondents who do not regularly follow football but watch the tournament — constitute the majority of the tournament audience in all six markets surveyed, ranging from 56% (UK) to 69% (United States).

Core Fans — respondents who watch football regularly — represent the remaining share of tournament viewers and report more consistent engagement across the full tournament duration.

Non-viewer rates (respondents who report never watching the tournament) range from 25.1% (Brazil) to 48.4% (United States) and are material to reach estimation in each market.

ON BEHAVIORAL DIFFERENCES

Casual Viewers report higher broadcast focus (+4% to +15% versus Core Fans) and higher browsing and shopping propensity (+10% to +51% versus Core Fans, varying by market).

Core Fans report higher use of sports-specific secondary applications — scores, statistics, and betting — during matches, and higher multitasking rates overall.

Both patterns are based on single-response self-reported data and reflect most-common behavior per respondent.

ON POST-ELIMINATION STATED INTENTIONS

Casual Viewers report higher rates of intending to stop watching following national team elimination: 48%-59% across the six markets.

Core Fans report higher continuation rates: 60%-77% state they would continue watching after national team elimination.

These figures represent stated pre-tournament intentions and may not accurately predict actual behavior.

ON PLATFORM AND MARKET VARIATION

Broadcast television is the most frequently reported primary viewing method in five of six markets; the United States is the exception, where combined streaming exceeds broadcast in this sample.

Core Fan online viewing share varies from 16% (UK) to 51% (United States), reflecting a range of reported digital viewing propensity within this segment across markets.

Food delivery in-match activity is recorded at 18.3% (Mexico) and 17.7% (Brazil), above the rates in the other four markets; non-multitasking rates are recorded at 59.8% (France) and 58.4% (Poland), above the rates in the other four markets.

ON ANALYTICAL BOUNDARIES

Respondents classified by self-reported football viewing habit — Casual Viewers versus Core Fans — record different behavioral profiles across all six markets surveyed.

All cross-market comparisons in this report are indicative and directional; sample sizes are undisclosed and no significance testing has been conducted.

Stated-intention data for post-elimination viewing should be interpreted with caution; actual audience changes at elimination events may differ from reported intentions.

INTERPRETIVE CAVEATS

The relative differentials (e.g., '+47% more likely to browse/shop') represent segment-level over- or under-indexing against the market average for that country. They indicate directional propensity differences, not absolute behavioral rates, and should not be interpreted as probabilities or predictions.

Sample sizes per country are not disclosed in the source documentation. Accordingly, no statistical significance testing has been applied to any comparison in this report. All findings — both within-country and cross-country — should be treated as indicative of directional patterns rather than as statistically validated differences.

Post-elimination viewing data reflects stated behavioral intentions reported prior to the tournament. Actual audience behavior following national team elimination may differ from stated intentions. This caveat applies to all findings in the post-elimination sections of this report.

The survey instrument uses single-choice response formats for key questions (e.g., primary viewing method, primary in-match activity). Reported figures therefore capture the most common behavior, not the full range of behaviors within a segment.

Appendix:
Raw Survey Data by Country

This appendix presents the complete survey result distributions for each of the six markets included in this report. Data is reported as the percentage of respondents in each market.

Brazil

MARKET OVERVIEW

The Brazil data was gathered as part of the 2026 World Cup Digital Audience Behavior Study conducted by Adlook. The survey covered football and 2026 tournament viewing habits, primary viewing methods, in-match multitasking behaviors, post-elimination viewing intentions, and respondent demographics.

Casual Viewers: 61% of the tournament audience — +7% more likely to be fully focused on the broadcast compared to core fans.

Core Fans: Approximately 39% of the tournament audience — 64% multitask during matches; 65% continue watching after national team elimination.

SURVEY RESULTS

The table below summarises the raw survey results for this market.

Survey Item	Result
Watches football regularly + 2026 tournament	29.1%
Watches football occasionally + 2026 tournament	21.4%
Does not watch football, watches 2026 tournament	24.4%
Does not watch either	25.1%
Primary method: broadcast TV	47.4%
Primary method: streaming via smart TV	22.0%
Primary method: laptop/desktop	9.4%
Primary method: smartphone/tablet	10.2%
Primary method: public venue	11.1%
In-match activity: social/messaging	19.1%
In-match activity: food/drink delivery	17.7%
In-match activity: scores/betting apps	14.8%
In-match activity: browse/shop online	10.9%

Survey Item	Result
In-match activity: none of these	37.5%
Continues watching after national elimination (Yes)	50.7%
Continues watching after national elimination (No)	29.1%
Gender: Female	39.8%
Gender: Male	47.0%
Age 45–60 + 61+	40.2%

AUDIENCE SEGMENT COMPARISON

The following table presents the key behavioral and demographic differentiators between Casual Viewers and Core Fans as recorded in the survey data for this market.

Metric	Casual Viewers	Core Fans
Share of audience	61%	~39% (tournament viewers)
Viewing focus uplift	+7% more focused	+4% more likely to use sports apps
Post-elimination drop-off	59% stop watching	65% continue watching
Browse/shop uplift	+24%	Lower; action-oriented in-match
Multitasking during match	Lower sport-related second screen	64% multitask during the game
Online viewing share	Lower propensity	39% watch via CTV/mobile/desktop
Age profile (45+)	39% aged 45+	Younger, more evenly spread
Gender	51% of women (higher representation)	More male-skewed

CASUAL VIEWER PROFILE

In Brazil, Casual Viewers account for 61% of the tournament audience as defined by this study. This segment comprises respondents who report watching the tournament but not following football regularly.

Key characteristics of this segment in Brazil:

- 39% of Casual Viewers are aged 45 or older, one of the older Casual Viewer age profiles across the six markets analyzed.
- 59% report they would stop watching following their national team's elimination from the tournament.
- This segment is +24% more likely than Core Fans to browse websites or shop online while watching.
- 51% of Casual Viewers are women, a higher share than recorded among Core Fans in this market.
- They are +7% more likely to be fully focused on the broadcast compared to Core Fans, despite lower engagement with sport-specific second-screen activity.

Primary viewing among Casual Viewers in Brazil is concentrated on large-screen formats: 66% report watching via broadcast TV or a connected large screen. Relative to Core Fans, Casual Viewers in this market are less likely to report using scores, statistics, or betting applications as their primary in-match secondary activity.

CORE FAN PROFILE

Core Fans in Brazil account for approximately 39% of the tournament audience as defined by this study. Reported post-elimination continuation rates indicate that this segment is more likely to maintain viewing throughout the tournament regardless of national team outcomes.

Key characteristics of this segment in Brazil:

- 65% continue watching matches even after the national team is eliminated.
- 39% watch via online platforms (CTV, mobile, desktop), a higher share than recorded among Casual Viewers in this market.
- 64% multitask during matches, with activity concentrated on sports-related

applications: scores, statistics, and betting.
- This segment is +4% more likely than Casual Viewers to use sports-specific second-screen apps during the match.

Core Fans in Brazil report higher rates of sports-specific secondary activity — including scores, statistics, and betting applications — compared to Casual Viewers. They also report higher multi-device viewing propensity. These patterns are based on self-reported data and reflect stated behaviors rather than observed behaviors.

NOTABLE MARKET OBSERVATIONS

Brazil records one of the lower non-viewer rates across the six markets analyzed at 25.1%.

Food and drink delivery is reported as the most common in-match secondary activity among Core Fans in Brazil, at 17.7% across all respondents — the second-highest rate among the six markets analyzed, after Mexico. This pattern is noted descriptively; no causal explanation is derived from the survey data.

Core Fan multitasking in Brazil is among the highest across the six markets analyzed at 64%. Brazil also records the highest social messaging rate among the six markets analyzed at 19.1%.

United Kingdom

MARKET OVERVIEW

The UK data was gathered as part of the 2026 World Cup Digital Audience Behavior Study conducted by Adlook. The survey covered football and 2026 tournament viewing habits, primary viewing methods, in-match multitasking behaviors, post-elimination viewing intentions, and respondent demographics.

Casual Viewers: 56% of the tournament audience — +4% more likely to be fully focused on the broadcast compared to core fans.

Core Fans: Approximately 44% of the tournament audience — 54% multitask during matches; 73% continue watching after national team elimination.

SURVEY RESULTS

The table below summarises the raw survey results for this market.

Survey Item	Result
Watches football regularly + 2026 tournament	29.2%
Watches football occasionally + 2026 tournament	18.1%
Does not watch football, watches 2026 tournament	18.6%
Does not watch either	34.1%
Primary method: broadcast TV	52.3%
Primary method: streaming via smart TV	17.6%
Primary method: laptop/desktop	8.6%
Primary method: smartphone/tablet	9.2%
Primary method: public venue	12.3%
In-match activity: social/messaging	15.2%
In-match activity: food/drink delivery	13.3%
In-match activity: scores/betting apps	13.8%
In-match activity: browse/shop online	10.6%

Survey Item	Result
In-match activity: none of these	47.1%
Continues watching after national elimination (Yes)	61.2%
Continues watching after national elimination (No)	20.9%
Gender: Female	37.2%
Gender: Male	43.8%
Age 45–60 + 61+	52.6%

AUDIENCE SEGMENT COMPARISON

The following table presents the key behavioral and demographic differentiators between Casual Viewers and Core Fans as recorded in the survey data for this market.

Metric	Casual Viewers	Core Fans
Share of audience	56%	~44% (tournament viewers)
Viewing focus uplift	+4% more focused	+3% more likely to use sports apps
Post-elimination drop-off	48% stop watching	73% continue watching
Browse/shop uplift	+47%	Lower; action-oriented in-match
Multitasking during match	Lower sport-related second screen	54% multitask during the game
Online viewing share	Lower propensity	38.1% watch via digital devices (mobile and desktop)
Age profile (45+)	49% aged 45+	Younger, more evenly spread
Gender	50% of women (higher representation)	More male-skewed

CASUAL VIEWER PROFILE

In the UK, Casual Viewers account for 56% of the tournament audience as defined by this study. This segment comprises respondents who report watching the tournament but not following football regularly.

Key characteristics of this segment in UK:

- 49% of Casual Viewers are aged 45 or older, one of the older Casual Viewer age profiles across the six markets analyzed.
- 48% report they would stop watching following their national team's elimination from the tournament.
- This segment is +47% more likely than Core Fans to browse websites or shop online while watching.
- 50% of Casual Viewers are women, a higher share than recorded among Core Fans in this market.
- They are +4% more likely to be fully focused on the broadcast compared to Core Fans, despite lower engagement with sport-specific second-screen activity.

Primary viewing among Casual Viewers in the UK is concentrated on large-screen formats: this segment reports slightly lower broadcast TV usage than the market average. Relative to Core Fans, Casual Viewers in this market are less likely to report using scores, statistics, or betting applications as their primary in-match secondary activity.

CORE FAN PROFILE

Core Fans in the UK account for approximately 44% of the tournament audience as defined by this study. Reported post-elimination continuation rates indicate that this segment is more likely to maintain viewing throughout the tournament regardless of national team outcomes.

Key characteristics of this segment in UK:

- 73% continue watching matches even after the national team is eliminated.
- 16% watch via online platforms (CTV, mobile, desktop), a higher share than recorded among Casual Viewers in this market.
- 54% multitask during matches, with activity concentrated on sports-related

applications: scores, statistics, and betting.

- This segment is +3% more likely than Casual Viewers to use sports-specific second-screen apps during the match.

Core Fans in the UK report higher rates of sports-specific secondary activity — including scores, statistics, and betting applications — compared to Casual Viewers. They also report higher multi-device viewing propensity. These patterns are based on self-reported data and reflect stated behaviors rather than observed behaviors.

NOTABLE MARKET OBSERVATIONS

UK records the highest browsing and shopping uplift for Casual Viewers relative to Core Fans of all six markets (+47%). This means that, in the UK, the divergence in browse/shop propensity between the two segments is larger than in any other market studied. The basis for this market-specific pattern cannot be determined from the survey data.

UK has the lowest Core Fan online viewing (mobile and desktop) share across the six markets analyzed at 16%. English Core Fans are therefore more concentrated on broadcast TV as a primary viewing surface than Core Fans in other markets, particularly the United States (51%) and Mexico (44%). No explanatory factor for this can be derived from the available data.

UK and Poland record the joint-highest overall continuation rate after elimination among the six markets analyzed, at 61.2% and 61.0% respectively. In both markets, the majority of all surveyed viewers report they would continue watching regardless of national team performance.

France

MARKET OVERVIEW

The France data was gathered as part of the 2026 World Cup Digital Audience Behavior Study conducted by Adlook. The survey covered football and 2026 tournament viewing habits, primary viewing methods, in-match multitasking behaviors, post-elimination viewing intentions, and respondent demographics.

Casual Viewers: 65% of the tournament audience — +7% more likely to be fully focused on the broadcast compared to core fans.

Core Fans: Approximately 35% of the tournament audience — 42% multitask during matches; 69% continue watching after national team elimination.

SURVEY RESULTS

The table below summarises the raw survey results for this market.

Survey Item	Result
Watches football regularly + 2026 tournament	19.5%
Watches football occasionally + 2026 tournament	16.7%
Does not watch football, watches 2026 tournament	19.5%
Does not watch either	44.3%
Primary method: broadcast TV	56.4%
Primary method: streaming via smart TV	11.9%
Primary method: laptop/desktop	9.9%
Primary method: smartphone/tablet	9.8%
Primary method: public venue	12.0%
In-match activity: social/messaging	11.3%
In-match activity: food/drink delivery	9.0%
In-match activity: scores/betting apps	11.6%
In-match activity: browse/shop online	8.2%

Survey Item	Result
In-match activity: none of these	59.8%
Continues watching after national elimination (Yes)	52.4%
Continues watching after national elimination (No)	20.8%
Gender: Female	39.2%
Gender: Male	40.0%
Age 45–60 + 61+	60.4%

AUDIENCE SEGMENT COMPARISON

The following table presents the key behavioral and demographic differentiators between Casual Viewers and Core Fans as recorded in the survey data for this market.

Metric	Casual Viewers	Core Fans
Share of audience	65%	~35% (tournament viewers)
Viewing focus uplift	+7% more focused	+9% more likely to use sports apps
Post-elimination drop-off	58% stop watching	69% continue watching
Browse/shop uplift	+51%	Lower; action-oriented in-match
Multitasking during match	Lower sport-related second screen	42% multitask during the game
Online viewing share	Lower propensity	31% watch via CTV/mobile/desktop
Age profile (45+)	60% aged 45+	Younger, more evenly spread
Gender	46% of women (higher representation)	More male-skewed

CASUAL VIEWER PROFILE

In France, Casual Viewers account for 65% of the tournament audience as defined by this study. This segment comprises respondents who report watching the tournament but not following football regularly.

Key characteristics of this segment in France:

- 60% of Casual Viewers are aged 45 or older, one of the older Casual Viewer age profiles across the six markets analyzed.
- 58% report they would stop watching following their national team's elimination from the tournament.
- This segment is +51% more likely than Core Fans to browse websites or shop online while watching.
- 46% of Casual Viewers are women, a higher share than recorded among Core Fans in this market.
- They are +7% more likely to be fully focused on the broadcast compared to Core Fans, despite lower engagement with sport-specific second-screen activity.

Primary viewing among Casual Viewers in France is concentrated on large-screen formats: 67% report watching via broadcast TV or a connected large screen. Relative to Core Fans, Casual Viewers in this market are less likely to report using scores, statistics, or betting applications as their primary in-match secondary activity.

CORE FAN PROFILE

Core Fans in France account for approximately 35% of the tournament audience as defined by this study. Reported post-elimination continuation rates indicate that this segment is more likely to maintain viewing throughout the tournament regardless of national team outcomes.

Key characteristics of this segment in France:

- 69% continue watching matches even after the national team is eliminated.
- 31% watch via online platforms (CTV, mobile, desktop), a higher share than recorded among Casual Viewers in this market.
- 42% multitask during matches, with activity concentrated on sports-related

applications: scores, statistics, and betting.
- This segment is +9% more likely than Casual Viewers to use sports-specific second-screen apps during the match.

Core Fans in France report higher rates of sports-specific secondary activity — including scores, statistics, and betting applications — compared to Casual Viewers. They also report higher multi-device viewing propensity. These patterns are based on self-reported data and reflect stated behaviors rather than observed behaviors.

NOTABLE MARKET OBSERVATIONS

France records the highest non-engagement rate among the six markets analyzed: 44.3% of respondents indicate they never watch football or the tournament, and 59.8% report doing none of the listed in-match secondary activities. The data do not provide an explanation for the level of non-engagement recorded in France relative to other markets.

Among Casual Viewers, France shows the highest browse/shop uplift of the six markets (+51%) and the highest aged 45+ concentration at 60%, France's Casual Viewer segment records both a higher aged 45+ concentration and a larger browse/shop differential relative to Core Fans than the other markets analyzed.

Core Fan multitasking in France is the lowest across all six markets at 42%. The data do not support a causal explanation for this difference relative to other markets.

Mexico 🇲🇽

MARKET OVERVIEW

The Mexico data was gathered as part of the 2026 World Cup Digital Audience Behavior Study conducted by Adlook. The survey covered football and 2026 tournament viewing habits, primary viewing methods, in-match multitasking behaviors, post-elimination viewing intentions, and respondent demographics.

Casual Viewers: 66% of the tournament audience — +15% more likely to be fully focused on the broadcast compared to core fans.

Core Fans: Approximately 34% of the tournament audience — 61% multitask during matches; 73% continue watching after national team elimination.

SURVEY RESULTS

The table below summarises the raw survey results for this market.

Survey Item	Result
Watches football regularly + 2026 tournament	21.9%
Watches football occasionally + 2026 tournament	19.2%
Does not watch football, watches 2026 tournament	24.0%
Does not watch either	34.9%
Primary method: broadcast TV	40.5%
Primary method: streaming via smart TV	22.5%
Primary method: laptop/desktop	11.0%
Primary method: smartphone/tablet	13.0%
Primary method: public venue	13.0%
In-match activity: social/messaging	15.0%
In-match activity: food/drink delivery	18.3%
In-match activity: scores/betting apps	12.3%
In-match activity: browse/shop online	11.9%

Survey Item	Result
In-match activity: none of these	42.5%
Continues watching after national elimination (Yes)	58.3%
Continues watching after national elimination (No)	22.6%
Gender: Female	39.9%
Gender: Male	41.7%
Age 45–60 + 61+	40.8%

AUDIENCE SEGMENT COMPARISON

The following table presents the key behavioral and demographic differentiators between Casual Viewers and Core Fans as recorded in the survey data for this market.

Metric	Casual Viewers	Core Fans
Share of audience	66%	~34% (tournament viewers)
Viewing focus uplift	+15% more focused	+9% more likely to use sports apps
Post-elimination drop-off	49% stop watching	73% continue watching
Browse/shop uplift	+26%	Lower; action-oriented in-match
Multitasking during match	Lower sport-related second screen	61% multitask during the game
Online viewing share	Lower propensity	44% watch via CTV/mobile/desktop
Age profile (45+)	40% aged 45+	Younger, more evenly spread
Gender	50% of women (higher representation)	More male-skewed

CASUAL VIEWER PROFILE

In Mexico, Casual Viewers account for 66% of the tournament audience as defined by this study. This segment comprises respondents who report watching the tournament but not following football regularly.

Key characteristics of this segment in Mexico:

- 40% of Casual Viewers are aged 45 or older, one of the older Casual Viewer age profiles across the six markets analyzed.
- 49% report they would stop watching following their national team's elimination from the tournament.
- This segment is +26% more likely than Core Fans to browse websites or shop online while watching.
- 50% of Casual Viewers are women, a higher share than recorded among Core Fans in this market.
- They are +15% more likely to be fully focused on the broadcast compared to Core Fans, despite lower engagement with sport-specific second-screen activity.

Primary viewing among Casual Viewers in Mexico is concentrated on large-screen formats: 62% report watching via broadcast TV or a connected large screen. Relative to Core Fans, Casual Viewers in this market are less likely to report using scores, statistics, or betting applications as their primary in-match secondary activity.

CORE FAN PROFILE

Core Fans in Mexico account for approximately 34% of the tournament audience as defined by this study. Reported post-elimination continuation rates indicate that this segment is more likely to maintain viewing throughout the tournament regardless of national team outcomes.

Key characteristics of this segment in Mexico:

- 73% continue watching matches even after the national team is eliminated.
- 44% watch via online platforms (CTV, mobile, desktop), a higher share than recorded among Casual Viewers in this market.
- 61% multitask during matches, with activity concentrated on sports-related

applications: scores, statistics, and betting.

- This segment is +9% more likely than Casual Viewers to use sports-specific second-screen apps during the match.

Core Fans in Mexico report higher rates of sports-specific secondary activity — including scores, statistics, and betting applications — compared to Casual Viewers. They also report higher multi-device viewing propensity. These patterns are based on self-reported data and reflect stated behaviors rather than observed behaviors.

NOTABLE MARKET OBSERVATIONS

Mexico records the highest Casual Viewer focus uplift among the six markets analyzed (+15%), the largest focus differential between the two segments recorded across the six markets.

Food and drink delivery is the most commonly reported in-match activity in Mexico at 18.3% of all respondents — the highest rate among the six markets analyzed. Mexico also records an above-average public venue viewing rate (13.0%) relative to Poland (7.2%) and France (12.0%), though this figure is broadly in line with the UK (12.3%) and the United States (13.9%).

Mexico's non-viewer rate of 34.9% is the median of the six markets, with a relatively even distribution across viewing habit categories. The data do not support attributing this pattern to specific external factors.

Poland

MARKET OVERVIEW

The Poland data was gathered as part of the 2026 World Cup Digital Audience Behavior Study conducted by Adlook. The survey covered football and 2026 tournament viewing habits, primary viewing methods, in-match multitasking behaviors, post-elimination viewing intentions, and respondent demographics.

Casual Viewers: 68% of the tournament audience — +6% more likely to be fully focused on the broadcast compared to core fans.

Core Fans: Approximately 32% of the tournament audience — 44% multitask during matches; 77% continue watching after national team elimination.

SURVEY RESULTS

The table below summarises the raw survey results for this market.

Survey Item	Result
Watches football regularly + 2026 tournament	20.6%
Watches football occasionally + 2026 tournament	25.2%
Does not watch football, watches 2026 tournament	18.1%
Does not watch either	36.1%
Primary method: broadcast TV	66.6%
Primary method: streaming via smart TV	10.0%
Primary method: laptop/desktop	8.2%
Primary method: smartphone/tablet	7.9%
Primary method: public venue	7.2%
In-match activity: social/messaging	9.3%
In-match activity: food/drink delivery	10.2%
In-match activity: scores/betting apps	10.3%
In-match activity: browse/shop online	11.8%

Survey Item	Result
In-match activity: none of these	58.4%
Continues watching after national elimination (Yes)	61.0%
Continues watching after national elimination (No)	20.8%
Gender: Female	42.0%
Gender: Male	42.9%
Age 45–60 + 61+	63.9%

AUDIENCE SEGMENT COMPARISON

The following table presents the key behavioral and demographic differentiators between Casual Viewers and Core Fans as recorded in the survey data for this market.

Metric	Casual Viewers	Core Fans
Share of audience	68%	~32% (tournament viewers)
Viewing focus uplift	+6% more focused	+8% more likely to use sports apps
Post-elimination drop-off	48% stop watching	77% continue watching
Browse/shop uplift	+10%	Lower; action-oriented in-match
Multitasking during match	Lower sport-related second screen	44% multitask during the game
Online viewing share	Lower propensity	25% watch via CTV/mobile/desktop
Age profile (45+)	68% aged 45+	Younger, more evenly spread
Gender	46% of women (higher representation)	More male-skewed

CASUAL VIEWER PROFILE

In Poland, Casual Viewers account for 68% of the tournament audience as defined by this study. This segment comprises respondents who report watching the tournament but not following football regularly.

Key characteristics of this segment in Poland:

- 68% of Casual Viewers are aged 45 or older, one of the older Casual Viewer age profiles across the six markets analyzed.
- 48% report they would stop watching following their national team's elimination from the tournament.
- This segment is +10% more likely than Core Fans to browse websites or shop online while watching.
- 46% of Casual Viewers are women, a higher share than recorded among Core Fans in this market.
- They are +6% more likely to be fully focused on the broadcast compared to Core Fans, despite lower engagement with sport-specific second-screen activity.

Primary viewing among Casual Viewers in Poland is concentrated on large-screen formats: 76% report watching via broadcast TV or a connected large screen. Relative to Core Fans, Casual Viewers in this market are less likely to report using scores, statistics, or betting applications as their primary in-match secondary activity.

CORE FAN PROFILE

Core Fans in Poland account for approximately 32% of the tournament audience as defined by this study. Reported post-elimination continuation rates indicate that this segment is more likely to maintain viewing throughout the tournament regardless of national team outcomes.

Key characteristics of this segment in Poland:

- 77% continue watching matches even after the national team is eliminated.
- 25% watch via online platforms (CTV, mobile, desktop), a higher share than recorded among Casual Viewers in this market.
- 44% multitask during matches, with activity concentrated on sports-re-

lated applications: scores, statistics, and betting.
- This segment is +8% more likely than Casual Viewers to use sports-specific second-screen apps during the match.

Core Fans in Poland report higher rates of sports-specific secondary activity — including scores, statistics, and betting applications — compared to Casual Viewers. They also report higher multi-device viewing propensity. These patterns are based on self-reported data and reflect stated behaviors rather than observed behaviors.

NOTABLE MARKET OBSERVATIONS

Poland has the highest broadcast TV concentration among the six markets analyzed at 66.6% of respondents using traditional TV as the primary viewing method. The Casual Viewer segment in Poland shows a marginal decrease from this figure (-4.9%), while Core Fans are more evenly distributed across platforms relative to Casual Viewers.

Poland records the highest Casual Viewer proportion aged 45 or older at 68%, making it the market with the oldest Casual Viewer demographic profile across the six markets analyzed. Poland also records the highest overall respondent age concentration (age 45-60 and 61+ combined: 63.9%) of the six markets.

The female over-representation within the Polish Casual Viewer segment is larger than that recorded in the other five markets, with women over-indexing relative to the Polish overall sample by +133%.

United States

MARKET OVERVIEW

The United States data was gathered as part of the 2026 World Cup Digital Audience Behavior Study conducted by Adlook. The survey covered football and 2026 tournament viewing habits, primary viewing methods, in-match multitasking behaviors, post-elimination viewing intentions, and respondent demographics.

Casual Viewers: 69% of the tournament audience — +12% more likely to be fully focused on the broadcast compared to core fans.

Core Fans: Approximately 31% of the tournament audience — 61% multitask during matches; 60% continue watching after national team elimination.

SURVEY RESULTS

The table below summarises the raw survey results for this market.

Survey Item	Result
Watches football regularly + 2026 tournament	16.2%
Watches football occasionally + 2026 tournament	16.0%
Does not watch football, watches 2026 tournament	19.4%
Does not watch either	48.4%
Primary method: broadcast TV	31.8%
Primary method: streaming via smart TV	28.2%
Primary method: laptop/desktop	11.4%
Primary method: smartphone/tablet	14.7%
Primary method: public venue	13.9%
In-match activity: social/messaging	17.6%
In-match activity: food/drink delivery	14.2%
In-match activity: scores/betting apps	11.9%
In-match activity: browse/shop online	13.9%

Survey Item	Result
In-match activity: none of these	42.5%
Continues watching after national elimination (Yes)	50.2%
Continues watching after national elimination (No)	25.5%
Gender: Female	36.2%
Gender: Male	41.5%
Age 45–60 + 61+	46.4%

AUDIENCE SEGMENT COMPARISON

The following table presents the key behavioral and demographic differentiators between Casual Viewers and Core Fans as recorded in the survey data for this market.

Metric	Casual Viewers	Core Fans
Share of audience	69%	~31% (tournament viewers)
Viewing focus uplift	+12% more focused	+9% more likely to use sports apps
Post-elimination drop-off	55% stop watching	60% continue watching
Browse/shop uplift	+31%	Lower; action-oriented in-match
Multitasking during match	Lower sport-related second screen	61% multitask during the game
Online viewing share	Lower propensity	51% watch via CTV/mobile/desktop
Age profile (45+)	45% aged 45+	Younger, more evenly spread
Gender	42% of women (higher representation)	More male-skewed

CASUAL VIEWER PROFILE

In United States, Casual Viewers account for 69% of the tournament audience as defined by this study. This segment comprises respondents who report watching the tournament but not following football regularly.

Key characteristics of this segment in United States:

- 45% of Casual Viewers are aged 45 or older, one of the older Casual Viewer age profiles across the six markets analyzed.
- 55% report they would stop watching following their national team's elimination from the tournament.
- This segment is +31% more likely than Core Fans to browse websites or shop online while watching.
- 42% of Casual Viewers identify as women (among respondents reporting gender as male or female), a higher share than recorded among Core Fans in this market.
- They are +12% more likely to be fully focused on the broadcast compared to Core Fans, despite lower engagement with sport-specific second-screen activity.

Primary viewing among Casual Viewers in the United States is concentrated on large-screen formats: 58% report watching via broadcast TV or a connected large screen. Relative to Core Fans, Casual Viewers in this market are less likely to report using scores, statistics, or betting applications as their primary in-match secondary activity..

CORE FAN PROFILE

Core Fans in the United States account for approximately 31% of the tournament audience as defined by this study. Reported post-elimination continuation rates indicate that this segment is more likely to maintain viewing throughout the tournament regardless of national team outcomes.

Key characteristics of this segment in United States:

- 60% continue watching matches even after the national team is eliminated.
- 51% watch via online platforms (CTV, mobile, desktop), a higher share than recorded among Casual Viewers in this market.

- 61% multitask during matches, with activity concentrated on sports-related applications: scores, statistics, and betting.
- This segment is +9% more likely than Casual Viewers to use sports-specific second-screen apps during the match.

Core Fans in the United States report higher rates of sports-specific secondary activity — including scores, statistics, and betting applications — compared to Casual Viewers. They also report higher multi-device viewing propensity. These patterns are based on self-reported data and reflect stated behaviors rather than observed behaviors.

NOTABLE MARKET OBSERVATIONS

The United States has the highest non-viewer rate among the six markets analyzed at 48.4%. Despite this, the United States also records the highest Casual Viewer share of the tournament audience at 69% among those who do watch. The data do not provide an explanation for the co-occurrence of high non-viewer rates and high Casual Viewer share.

The United States records a more distributed viewing platform profile than the other five markets, with broadcast TV at 31.8% — lower than all other markets analyzed — and streaming via smart TV at 28.2%. The combined streaming and digital share (smart TV + laptop + mobile) of 54.3% exceeds broadcast TV, a pattern not observed in the other five markets studied.

Core Fan multitasking in the United States (61%) and Core Fan online viewing (51%) are both among the highest across the six markets analyzed. The data do not provide an explanation for these market-level differences.

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