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Global Sports Media Consumption Report 2012

A study of sports media consumption and preferences in 10 international markets

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About the project partners

This report was researched and written by Chris Harper, a market researcher at KantarSport. Chris has extensive knowledge researching the sports and sponsorship industry for right holders, sponsors, broadcasters and sporting venues.

PERFORM

PERFORM commercialises multimedia sports content across internet-enabled digital platforms, driving revenues through a mix of Content Distribution, Advertising & Sponsorship and the development and management of Subscription Platforms.

TV SPORTS MARKETS

TV Sports Markets, part of the SportBusiness Group, publishes hard-to-get, specialist information on the business of television sport. It publishes the acclaimed fortnightly newsletter which has been relied on for over 15 years by the industry's top TV executives for accurate information and reliable analysis.

KANTARSPORT

KantarSport are the world's leading sports and entertainment research specialists, delivering actionable insights to over 250 sports federations, rights holders, clubs/teams, venues, broadcasters and sponsors globally. A specialist agency in Kantar Media with over 50 offices worldwide, KantarSport provides market leading monitoring, evaluation and market research services that help clients make more informed decisions about how sport and entertainment can impact on consumer behaviour in order to grow their business.

FOREWORD

This second annual survey of global sports media consumption by PERFORM, KantarSport and TV Sports Markets confirms many of the trends highlighted in the first report in 2011 and brings into even sharper focus some of the changes in consumer habits that anybody working in the sports media industry needs to be attuned to.

The rapid growth of social media stands out as a theme. This is not surprising, coming at a time that the possibilities offered to sport by the enormous global audiences of social media platforms like YouTube and Facebook are finally being converted from theory into practice. Two deals – YouTube's deal with Fifa and PERFORM's deal with Facebook – have underlined that trend in 2012.

In March, YouTube agreed a deal to carry a channel created by Fifa, football's world governing body. Aside from the specifics of the deal, and the potential economic benefits for both parties, it is worth thinking about the symbolic import of such a deal. Until a relatively short time ago, YouTube's uploaded video content was seen as the scourge of sports rights-holders and mainstream sports broadcasters angry that the Google-owned company could build a multi-billion dollar business without paying a cent in rights fees. English football's Premier League and other sports bodies are still locked into a copyright battle with YouTube in the US courts. A deal with Fifa, following a deal with the International Olympic Committee for an Olympic channel in Asia, means respectability, a coming in from the cold.

Stephen Nuttall, senior director of sports for YouTube Europe, Middle East and Africa argues that as rights-holders increasingly embrace YouTube, mainstream broadcasters should not be afraid. He says that "sport is incredibly appealing on social media, and social platforms work very well together with television. The heaviest users of social media are also the same people that watch the most on television and so it would appear that the use of social media is stimulating TV viewing."

In April, PERFORM launched more than 50 sports channels on Facebook through its Livesport.tv live and on-demand sports viewing platform. The attraction for PERFORM was Facebook's "targeted advertising to reach potential subscribers for each sport." The platform would enable PERFORM to "communicate with niche fans around the world looking for special interest live sports content and use the in-built virality of the platform to target the hundreds of millions of sports fans on Facebook to share our video-on-demand sports content and drive video views globally."

Oliver Slipper, PERFORM's chief executive, explains the attraction of a platform like Facebook for content producers. "If you can build applications within Facebook with all the relevant 'sharing functionality', it becomes interesting. If you are a friend of mine on Facebook, you might be able to see what I'm watching and when I'm watching it. That prompts you to watch it when it's relevant content to you. Typically, your Facebook friends have similar interests to you. So, potentially, it can become a very interesting way of marketing sports broadcast and editorial services to fans. I think there are big opportunities for people that embrace Facebook. You have to do it well, with the right levels of sharing and content distribution."

The continuing rise of the internet and social media has, of course, to be set in the context of the overwhelming dominance of traditional, linear television as a way of watching sport. Indeed, the Global Sports Media Consumption Report 2012 seems to suggest that the two media cannot only coexist but may be enjoying a symbiotic relationship, with each feeding the other. Inevitably, perhaps, the complementary nature of the internet and linear television raises interesting questions about how the sports broadcasting landscape will be re-drawn, if at all, when connected TV sets are universally available. This will be one of the most eagerly-awaited areas of investigation of the Global Sports Media Consumption Report in the coming years.

Frank Dunne
Editor
TV Sports Markets

Market Insights

MARKET INSIGHT: WOMEN'S TENNIS ASSOCIATION

The Women's Tennis Association put itself into the vanguard of sports media rights-holders, exploring the digital possibilities for its rights by selling its global media rights to digital sports media company PERFORM last year. Andrew Walker, the WTA's chief marketing officer, explains the association's approach to media rights exploitation and how it is benefiting from booming consumption on new media platforms.

The Women's Tennis Association, which controls the media rights for the annual professional women's tennis tour, will for the next four-and-a-half years at least leave the distribution of its most compelling and precious content – media rights for tournament action – to the PERFORM Group and the IEC in Sports agency. But that hasn't stopped it from exploiting other content on growing platforms like mobile and social networks to drive fan interest and revenues.

This Global Sports Media Consumption Report 2012 underlines the growing importance of these new platforms. The number of fans using smartphones and tablets to consume sport in 2012 compared to two years ago has increased by 10 per cent in France, Italy, Spain, the UK and Australia, by about 15 per cent in Russia and the USA, about 20 per cent in Brazil, and over 40 per cent in China.

Last year, the WTA agreed a ground-breaking four-year deal, from 2013 to 2016, with PERFORM for its flagship content – its tournaments' cross-platform global media rights. Perform will exploit some digital rights – including the live streaming rights for betting websites – itself. IEC in Sports will sell the association's television rights under a deal with PERFORM.

> "MOBILE IS GOING TO BECOME INCREASINGLY IMPORTANT AS THE DATA CAN TRAVEL FASTER, AS THE DEVICES ARE ABLE TO DO MUCH MORE, AND OBVIOUSLY THERE'S A HUGE ADVANTAGE TO MOBILE VERSUS A LAPTOP OR A DESKTOP BECAUSE OF MOBILITY."

The growth of high-speed internet access and the falling cost of production in theory makes 'disintermediation' – rights-holders selling their own media content direct to fans – more affordable and more likely. But generally only small rights-holders that have failed to earn the more secure revenues available from the traditional route of selling to broadcasters, either directly or via agencies, have so far taken this approach.

"For the moment, the WTA are going to continue to work with external expert partners," says Walker. He explains the drivers behind the PERFORM deal: "It was a huge uplift for us in terms of the rights fee and the net revenue that's flowing back to the WTA. And, as importantly, there's going to be a huge uplift in the number of matches produced." Nearly three times as many matches will be produced for television in the new cycle.

Alongside the rights fee and increase in matches produced, the key attraction of PERFORM was its experience in digital media, Walker said. "A large part of the reason we did the PERFORM deal is… they've got a huge digital expertise that we believe will significantly increase our overall exposure. Television remains critically important but obviously digital is becoming increasingly important and we want to make sure we've got a true multiplatform approach that takes advantage of convergence [between old and new media technologies]. We believe that PERFORM is a fantastic partner in that respect."

While PERFORM and IEC distribute the match coverage video content, the WTA is planning other content for the internet, to engage fans and profit from their interest.

"Good content and unique content and exclusive content in the sports space, and in many others, is a very valuable asset. I think it behoves any property to think very long and hard about what kind of content they want to be creating. Starting with, in [our] case, a live match, but [also] everything else around it that can add value to fans experience and that can be monetised in one way or another."

Walker says that, of all the new ways of accessing sports content, mobile is the platform which the WTA is most focused on developing content for.

"That's the one where we all need to be focused in terms of optimising content, making content as robust as possible. That includes not only things like highlights and off-court content and statistics of all kinds, but also live streaming and actual match footage. That's something that's already happening and it will be a continuing trend, that the mobile live rights will become increasingly important as the devices are becoming better and better from a viewing perspective."

The WTA's focus on mobile is being driven by trends showing increasing usage of mobile and smartphones, "people wanting to access content more often while they're on the move," and developing technology. The Global Sports Media Consumption Report 2012 shows that a significant proportion of sports fans in key tennis territories watch sports coverage on mobile. In China, 64 per cent of fans said they do so; in Australia the figure was 28 per cent; in Great Britain 28 per cent; in Spain 28 per cent; and in France 18 per cent.

"Mobile is going to become increasingly important as the data can travel faster, as the devices are able to do much more, and obviously there's a huge advantage to mobile versus a laptop or a desktop because of mobility. [It is] is going to play a more and more important role in connecting with fans, and doing things that are optimised for mobile will become increasingly important.

"We are in the early stage of developing a strategy on what we want to offer our fans on mobile. The starting point generally has been what's on your website. The immediate plan is to re-launch our mobile site so it is able to offer better and more comprehensive content that is much more user-friendly.

"We've got a joint-venture partnership with the ATP [the Association of Tennis Professionals, which organises the annual men's world tour] under which we launched a live scoring application. That's been downloaded 700,000 times. Scores in sport are generally number one in terms of what fans are looking for on mobile."

This content is free and aimed at increasing fan engagement and driving web traffic. The association is hoping this will pay financial dividends via improved sponsorship deals.

The WTA is also pursuing sponsorship revenues through social networks, another boom area in sports media consumption in 2012. In Great Britain 21 per cent of fans used social networking to consume sport in 2012, compared to 13 per cent in 2011. In Germany, the proportion increased from 13 to 15 per cent, in France from 12 to 16 per cent, and in Spain from 19 to 25 per cent. The US had the biggest jump – from 15 to 26 per cent – and there were also increases in the key growth markets of Brazil (41 to 43 per cent) and China (40 to 46 per cent).

Walker says that the large following the WTA, and its players and tournaments, have across their various social media accounts is already helping the association in its sponsorship sales. The WTA, its players and tournaments have a total of 32 million unique followers across Facebook, Twitter, and a number of Chinese platforms.

"For our tournaments, we are working with our individual events to help them grow their communities. They can then use those communities to: help sell tickets, help drive television tune-in, and provide an additional media platform for their sponsor partners. Those are the three big elements in terms of the P&L of our events. So those are very direct ways that we are using social media to help support their businesses." ■

MARKET INSIGHT: YOUTUBE

YouTube now experiences four billion video views per day and is increasingly becoming a part of the mainstream coverage of sport. Stephen Nuttall, senior director of sports for YouTube Europe, Middle East and Africa, talks about how the growth of the internet, and in particular, social media, is changing the way we engage with sport.

The rapid growth in the consumption of sport on the internet shows no signs of representing a threat to television. On the contrary, as the Global Sports Media Consumption Report 2012 shows, the two media are increasingly complementary. Far from subtracting eyeballs from TV screens, the internet, especially through social media and video-sharing sites, appears to be driving more people to the television, which remains the main medium through which fans follow sport.

Stephen Nuttall, senior director of sports for YouTube Europe, Middle East and Africa, is not surprised by the findings. "Sports viewing on TV continues to increase because sport is one of the genres of content that still brings together a mass audience in a way that other genres increasingly cannot do."

The year-on-year increase in the numbers of fans using the internet to consume sport has reinforced Nuttall's belief that the internet and television can work in unison. In the Western European markets of France, Spain and Italy, the internet replaced the written press as the second-most popular method of consuming sport.

"I think that sport is incredibly appealing on social media, and social platforms work very well together with television.

> "THE HEAVIEST USERS OF SOCIAL MEDIA ARE ALSO THE SAME PEOPLE THAT WATCH THE MOST ON TELEVISION, SO IT WOULD APPEAR THAT THE USE OF SOCIAL MEDIA IS STIMULATING TV VIEWING"

The heaviest users of social media are also the same people that watch the most on television and so it would appear that the use of social media is stimulating TV viewing. For example, one of the factors which drove this year's record [American football] Super Bowl television audience in the US was its distribution on social media." Nuttal adds that YouTube plans to enhance the traditional television broadcast for the 34th edition of the America's Cup next year in a similar fashion.

"YouTube has worked together with various broadcasters to run events whereby it has either shared live coverage or it has run complementary coverage with the aim of driving the audience to the linear broadcast on television. This summer, YouTube has a partnership with NBC for the 2012 Olympics whereby the multiple live streams of NBC coverage are going to be powered by YouTube. It is an example of how the internet is now capable of delivering substantial audiences."

He said that YouTube also had the capability to gain bigger audiences than television for certain sporting events, which demonstrated that the internet was becoming a viable alternative to television for some events.
"We showed the German Supercup live last year in various markets. The

match was between two teams [league winners Borussia Dortmund and cup winners Schalke 04] who each had a Japanese player. In Japan, the match was shown live on television by [commercial broadcaster] Fuji TV and live on YouTube. I understand that the audience on YouTube was greater than the audience on television."

The increasing size of audiences that are watching sport on the internet meant that online advertising revenues could now be compared with television advertising revenues, Nuttall said. Rates for online advertising – YouTube's primary revenue source – could be compared favourably against television. "The old idea that online ad rates don't compete with television is just wrong. We are often able to price at a premium to television because we can deliver certainty to the advertiser that the viewer is engaged and we also know much more about them.

"We have the 'TrueView' advertising format, whereby if you skip the ad then the advertiser will not be charged but if you don't skip the ad then the advertiser pays a premium because they know they have an engaged and relevant viewer. As all of our advertising is being internet delivered it is incredibly targeted. Those ads are sold at a decent premium on a cost-per-thousand basis to television.

In addition to its free, ad-funded content, YouTube now offers pay-per-view services in the US, although the channels have niche audiences. "It is one of the few markets where it has been launched. It is a small offering. We do some cricket, extreme sports, combat sports on a pay basis amongst other genres. He said that people were willing to pay for online content because "the means of delivery is largely irrelevant. It's the content that the people are subscribing to and how it reaches the screen doesn't really matter." The number of people watching the internet on connected TV sets remains low but Nuttall believes that connected TV will further the internet's influence on how people consume sport. The technology is set to make up 20 per cent of the global television market by 2016. "YouTube is ideally placed to capitalise on the connected television market. It is available on almost every connected television that there is. I've heard various television manufacturers say that the YouTube app is typically the most downloaded and most used app on connected television." In China, 26 per cent of sports fans now consume content on connected television sets, while in the markets of France and Russia it is 11 per cent.

The Global Sports Media Consumption Report 2012 also shows an increase in the proportion of sports fans using mobile devices to consume sport, with a third of sports fans in the US now using the medium. That tallies with YouTube's experience, according to Nuttall. Mobile has been a key growth area for the platform. "Viewing on mobile devices is increasingly significant for YouTube. Mobile is the fastest growing category with something like 15 per cent of our total views on mobile. I think that catching up on sports clips and highlights using your mobile phone is a pretty obvious thing for consumers to want to do.

"People increasingly have a wide range of screens available to them on which to consume sport. Viewers want constant contact with sport and it's particularly well-suited to the connected multiple screen experience. I think that sport can be enhanced through delivery over the internet compared to what you can do with regular broadcast television. There is an increasing demand online as people don't make distinctions between television and mobile phones – it's just another screen that's connected to the internet.

"There is no doubt that there is a clear consumer demand for sports content and increasingly it is convenient for users to consume sport on internet-connected devices that they carry around with them. In the past you might have worried about the internet's capacity to serve a substantial audience but now I think that is less and less of a concern."

According to the Global Sports Media Consumption Report 2012, between 10 and 20 per cent of fans who stream live sport online do so via unofficial websites, with the number reaching one in five in markets like France. YouTube was long seen as a 'pirate' website by sports-rights holders because of the amount of unofficial footage uploaded by its users. This has been changing in recent years, with YouTube putting strict measures in place to ensure it is not carrying sports footage which breaches the copyright of sports bodies.

"Presently we work with a very wide range of rights-holders, not just in sport, to protect the IP of the content owners. We have a system called 'Content ID' which is a comprehensive reference library of videos. Rights-holders frequently upload reference files of their coverage and those go into the reference library. Every minute, 60 files of content are uploaded to YouTube. Each of these uploads is cross-checked in real time with our library.

"If we see a match [between the uploaded content and the archive] we follow the rights-holders' instructions. They have three options: they can block it; allow it to be uploaded and then track the consumption of the video; or allow the video to be uploaded and have Google sell advertising against it." For this third option, the money goes to the rights-holder, subject to a revenue share with Google. The NBA is just one major rights-holder that has opted for the third possibility, Nuttall said. ■

MARKET INSIGHT: PERFORM

PERFORM has created a unique and important role for itself in the delivery of online sports content, working with rights-holders to create value from a medium which, despite its global reach, has proved notoriously difficult to monetise. PERFORM's joint chief executive Oliver Slipper discusses changes in the sports media consumption landscape and the emerging platforms which will shape future consumption.

Mobile is where growth is happening now and social networking is the next boom area for sports consumption, according to Oliver Slipper, joint chief executive of digital sports media company PERFORM.

"We're seeing greater all-round consumption. People are spending a greater amount of time viewing stuff online than they were before, and that's driven really by the strength of the smartphone and tablet market," he says. "What you're seeing is a significant shift of people moving their viewing habits to portable devices."

> "AT PRESENT, THE BIGGEST ROLE OF FACEBOOK, ARGUABLY THE MOST INFLUENTIAL SOCIAL MEDIA SERVICE, IN SPORTS CONSUMPTION IS IN DRIVING TRAFFIC FOR OTHER SPORTS WEBSITES"

The trend towards mobile consumption is being helped in developed markets by cross-platform services such as UK broadcaster BSkyB's Sky Go service, which allow pay-television subscribers to watch programming on their mobile devices, as well as on PCs. In Great Britain, 21 per cent of sports fans consumed sport by mobile in 2011, rising to 28 per cent in 2012. In Spain, the proportion has increased from 20 per cent to 28 per cent.

Mobile consumption of sport is also growing rapidly in developing markets, such as China and Brazil, according to the 2012 Global Sports Media Consumption report. In China, 64 per cent of sports fans say they use mobile to consume sport, up from 53 per cent last year. In the US, this year's figure is 34 per cent, up from 21 per cent last year. "In China mobile will probably overtake print in 2013," Slipper says.

The type of content accessed via mobile varies across the globe, depending on the strength of the mobile infrastructure.

"Video is predominantly driven by a Wi-Fi connection. The advent of 4G [the next generation of high-speed mobile internet connection] helps video. In the developed world where there is good fixed line and fixed broadband infrastructure, mobile video consumption is big already," Slipper says.

"In the developing world where there is limited broadband infrastructure and most mobile internet content is still done via a GSM phone signal [used by older mobile phones too slow to deliver high-quality video content] video doesn't really have a place yet. So somewhere like Africa, where we have huge usage of our Goal.com product, it is predominantly for text content."

PERFORM's acquisition last year of Goal.com, a football news website, was aimed at capturing some of the growing online and mobile audiences for text, and particularly video, sports coverage.

"The reason we were attracted to Goal.com is that it had built an absolutely massive audience through editorial [text content] without really any quality data or video. Our strategy is very much to deliver video content through [it]. At least one in three or four stories now has a video attached to it.

"Goal.com is not about owning a website; it's about owning a digital media brand. Over the next few years you'll see it as a standalone website, as an application on all the various smartphones, it will be a connected TV application, and it will have its own television show."

Goal.com would join an increasing number of sports media companies in developing an application for connected TV, a technology that is having a growing impact on sports coverage. Connected TV apps are designed to present internet content on television sets – just as mobile apps present such content in a form suited to mobile screens.

The technology tantalisingly puts internet players such as YouTube and film and television service Netflix into more direct competition for eyeballs, and potentially sports-rights content, with traditional television broadcasters.

In France, Italy, Spain and the US over 10 per cent of sports fans have, in the last two years, started to use a connected television, set-top box or games console to consume internet sports content. In Brazil and Russia the figure is approaching 20 per cent. In China it is about 40 per cent.

Slipper doubts whether the technology will revolutionise the way we view sport, and says that take-up among consumers is still low. But he believes there are opportunities for niche sports and in creating more tailored viewing experiences for fans.

"Although pretty much every television over £300 (€366/$484) now is connected, actual connection rates and usage of services is still pretty low. The likes of Netflix and [film service] LoveFilm, that are pushing their services very hard, are going to improve usage and hopefully benefit [PERFORM's] products over the next few years.

"Where the internet has a major advantage over a linear television signal is in video-on-demand. I think where you'll see the real champions created out of the internet television market is in movies and music. I'm not sure that the same opportunity exists in sport. I don't think you'll find an internet TV provider taking on [dominant UK pay-television operator] Sky.

"I think it's just about improving your reach, giving access to more fans and being able to deliver a service into the living room rather than onto a PC. PERFORM streams a huge volume of live niche content on a subscription basis. Let's say I was an Aussie Rules football fan and wanted to watch every match. The only place I can do that in the UK is via our live subscription service. I think that service becomes a much more attractive proposition when it's on a 42-inch television set versus a 10-inch laptop screen."

To illustrate the possibility to create more tailored viewing experiences, Slipper references sports news channels: "A rolling sports news channel arguably gets a bit dull. Typically it's a one-hour loop of content going over the same thing. If I can just dip into my connected TV and download the four or five clips that are relevant to me that's a better user experience."

Social media is another development poised to play a bigger role in our sports consumption, Slipper says. At present, the biggest role of Facebook, arguably the most influential social media service, in sports consumption is in driving traffic for other sports websites. For example, football clubs promote 'liking' of their official websites by Facebook users, which is a way of linking the websites to Facebook accounts. Once 'liked', the websites deliver news items to a Facebook user's news feeds.

"It is a way of driving significantly increased traffic to your website," Slipper says. "For Goal.com, Facebook now accounts for 10 to 15 per cent of all our monthly traffic as a referrer. So it is a big driver of clicks, and equally a big driver of revenues."

Looking ahead, Slipper says that Facebook has strong potential as a platform for video and editorial content in itself. "I think video is the next thing to crack. If you can build applications within Facebook with all the relevant 'sharing functionality', it becomes interesting.

"If you are a friend of mine on Facebook, you might be able to see what I'm watching and when I'm watching it. That prompts you to watch it when it's relevant content to you. Typically, your Facebook friends have similar interests to you. So, potentially, it can become a very interesting way of marketing sports broadcast and editorial services to fans. I think there are big opportunities for people that embrace Facebook. You have to do it well, with the right levels of sharing and content distribution."

As this report went to press, PERFORM had just launched over 50 sports 'channels' on Facebook. The move allows users to access video content including European and South American football, Australian Rules football, MMA, tennis, snooker, and rugby, without leaving the social network's pages. It includes a mixture of free and paid-for content. ■

Executive Summary

700m

Sports fans across 10 markets surveyed

This second annual report into sports media consumption aims to provide a snapshot of how sports fans are consuming sports content in an increasingly diverse media landscape year-on-year. The report covers a wide range of media (TV, print media, radio, online, social), a wide range of devices (televisions, connected TVs, mobiles, tablets, PCs) and a wide range of sports content formats (video, data, editorial, news) in an attempt to fully understand who, what, where and how sports fans are consuming sports media.

The report covers ten global markets, eight of which, Great Britain, Germany, Spain, France, Italy, USA, Brazil and China were monitored last year, whilst Australia and Russia were covered for the first time this year. In all markets approximately 1,000 interviews were conducted online in February / March 2012. The sample interviewed in Great Britain, Germany, Spain, France, Italy and USA represents adults aged 18+. In Brazil and Russia the sample represents internet connected adults aged 18+ and in China the sample represents urban internet connected adults aged 18+. The key findings include:

- In the 10 markets surveyed there were over 700 million sports fans. The proportion of sports fans ranged from 68% of the adult population in France to 90% of the urban internet connected adult population in China.
- Fans in Europe and the USA spend, on average, between 4 – 8 hours per week consuming sport. This increases to over 10 hours per week in Brazil and upwards of 11 hours per week in China.
- TV continues to be the dominant media for following sport with almost all fans in each market consuming sport via this method. The uptake of high definition TV remains a key way in which fans have changed their media consumption of sport in the past two years.
- The adoption of internet connected TV/ internet enabled set top boxes remains low across all markets except in France, China and Russia. China has recently witnessed significant growth in the proportion of fans using this method to watch sport.
- Consuming sport online is the second most popular method fans use to follow sport in all markets except Great Britain and Germany where print media remains the second most popular. Whilst following sport online has increased in all markets (except Brazil), print media remains a key means for consuming sport with approximately 50 – 70% of fans in all markets still following via this method.
- A key change in 2012 has been the expansion in the use of social media platforms (except in Italy) both for fans following and by sports properties engaging with their fans. Facebook and YouTube are the most popular platforms except in China where RenRen is used by 80% of social media users.
- In Great Britain, Germany, France, Italy and Australia upwards of 1 in 2 fans consume sport online, whilst in Spain, USA and Russia this increases to 2 out of 3 fans and in Brazil and China 8 out of 10. There has been a continued growth in the tendency to watch and read online and a more significant uplift in following sport via a mobile device this year. Increased internet penetration in Brazil and China has seen the respective online sports universe in those countries increase by 12% and 20% respectively.
- Reading articles online via a PC is the most common online activity in all markets except China which has a high proportion of fans (73%) watching online sports coverage. Brazil (57%) and Russia (49%) are two other markets with a greater proportion of fans claiming to watch sport online via a PC. These three markets also represent the highest level of watching live streaming of sports events.

- The profile of a fan consuming sport via the internet continues to be skewed towards the young, affluent and male.
- The propensity of fans paying to watch sport is greatest in China and Brazil. In China this is driven by the desire to watch content from other time zones via both pay TV and subscriptions to a website, mobile phone or tablet computer. In all markets pay TV is the key means of paying to watch sport.
- The number of sports fans open to paying for live sport online has declined slightly across Western European countries but increased in the USA, China and Brazil. If fans had a choice of how they would pay to watch sport then an annual subscription is generally preferred with the strongest demand for pay-per-view coming from Germany (37%), Spain (28%), UK (27%) and Australia (27%).

11.7

hours spent consuming sport by Chinese fans in an average week

5.9bn

mobile subscriptions globally

Introduction

The second Global Sports Media Consumption Report aims to show how, year-on-year, fan engagement with sports media has evolved. In particular, this report delves deeper into attitudes towards media consumption across various devices and platforms and the extent to which fans interact with brands that sponsor or advertise around sports content.

As the first annual report indicated, the use of TV to consume sport was almost universal across all markets and the adoption of high definition TV was one of the key ways in which fans had changed their media consumption of sport in recent years.

However, as indicated in the first annual report, the internet through PC's, mobiles, tablets and now connected TVs also provide a key platform through which fans consume sport, where both text and video based content is readily accessible. Currently, internet penetration exceeds 2 billion people globally, representing approximately 32.7% of the world's population[1]. The International Telecommunications Union (ITU) estimate that 45% of the world's internet users are under the age of 25[2]. In addition, there were estimated to be over 1.2 billion people around the world using social networking websites at least once per month by the end of 2011[3].

There are now 5.9 billion mobile subscriptions globally (87% of the world's population), increasing from 5.4 billion in 2010 and 4.7 billion mobile subscriptions in 2009. The ITU estimates that there are almost 1.2 billion mobile broadband subscriptions with mobile subscriptions outnumbering fixed broadband subscriptions 2 to 1. In addition, connected TV subscriptions recorded the strongest growth quarter at the end of 2011[4].

With these continued developments across all media platforms, the second annual Global Sports Media Consumption Report aims to discover how fans consume sport in this ever changing media landscape.

This report is the result of a collaboration between research agency, KantarSport, digital sports media company PERFORM and industry leading publication TV Sports Markets.

Great Britain

Executive Summary

This report covers the British market as part of a global study of sports consumption which covered 10 markets. In Great Britain 1,028 interviews were conducted online in February/ March 2012. The sample interviewed represents adults aged 18+. The key findings include.

- Almost three quarters of the population of Great Britain claim to follow at least one sport. This equates to approximately 33 million sports fans.
- The average sports fan spends approximately 6 hours per week consuming sport.
- Television continues to be the means through which the majority of fans follow sport. The adoption of HDTV has been the biggest change in the last 2 years though it is considered that 3D viewing at home will have the greatest impact over the next 2 years. However, the proportion of fans who believe this has declined year on year.
- Following sport via an internet connected TV/ internet enabled set top box remains low in Great Britain; just 5% of fans claim to use this method. However, it is believed to have a greater impact on sports consumption in the future.
- Print media remains the second most popular method fans use to consume sport, although online is closing the gap.
- Use of the internet to follow sport has increased year-on-year, with 58% of fans now claiming to use this method. Half of fans that consume sports online claim to stream live sport. Streaming live sport has overtaken reading sports news online.
- Among those that watch sports content online, more than 2 in 3 are satisfied with the viewing quality. However, just 9% of sports fans are willing to pay for live content online.
- Use of mobile devices to follow sport has increased and fans spend longer reading articles via these devices than they do in print media or via a PC.
- The profile of a fan consuming sport via the internet is in the main, skewed towards the young, male and affluent.
- The number of fans following sport via social networking platforms has increased year-on-year to 1 in 5 and represents almost 7 million people. Users are skewed towards the young. One fifth of fans that follow sport via these platforms claim to share videos of sports highlights on these websites.
- Fans in Great Britain indicate that they have low engagement with brands that sponsor or advertise around sports, as in the rest of Europe. However, fans that use social networking platforms to follow sports have a greater propensity to engage with brands.

1 Sports Consumption Overview

This section provides insight into how fans are interacting with sports content.

- In Great Britain, almost three quarters of the population follow sport, representing approximately 33 million people.
- When asked why they follow sports, the main reason is for enjoyment followed by sport being a nice distraction from everyday life with an additional third of fans following sport because their friends or family do.

33m
approximate number of adult sports fans in Great Britain

Table 1: Size of sport following in Great Britain

Market	% of adult population claiming to follow sport	Approximate number of adult sports fans
Great Britain	73	33,000,000
Follow = watch live or highlights coverage and/ or read about frequently and/ or talk about frequently		

Top 10 sports followed in Great Britain

- Football remains the main sport fans follow in Great Britain, followed by Formula 1.
- Whilst the popularity of tennis has remained consistent year-on-year, rugby union has increased in popularity whilst cricket has declined (2011 popularity may have been driven by the winter Ashes series).

43%
Britains follow football, the most followed sport in 2012

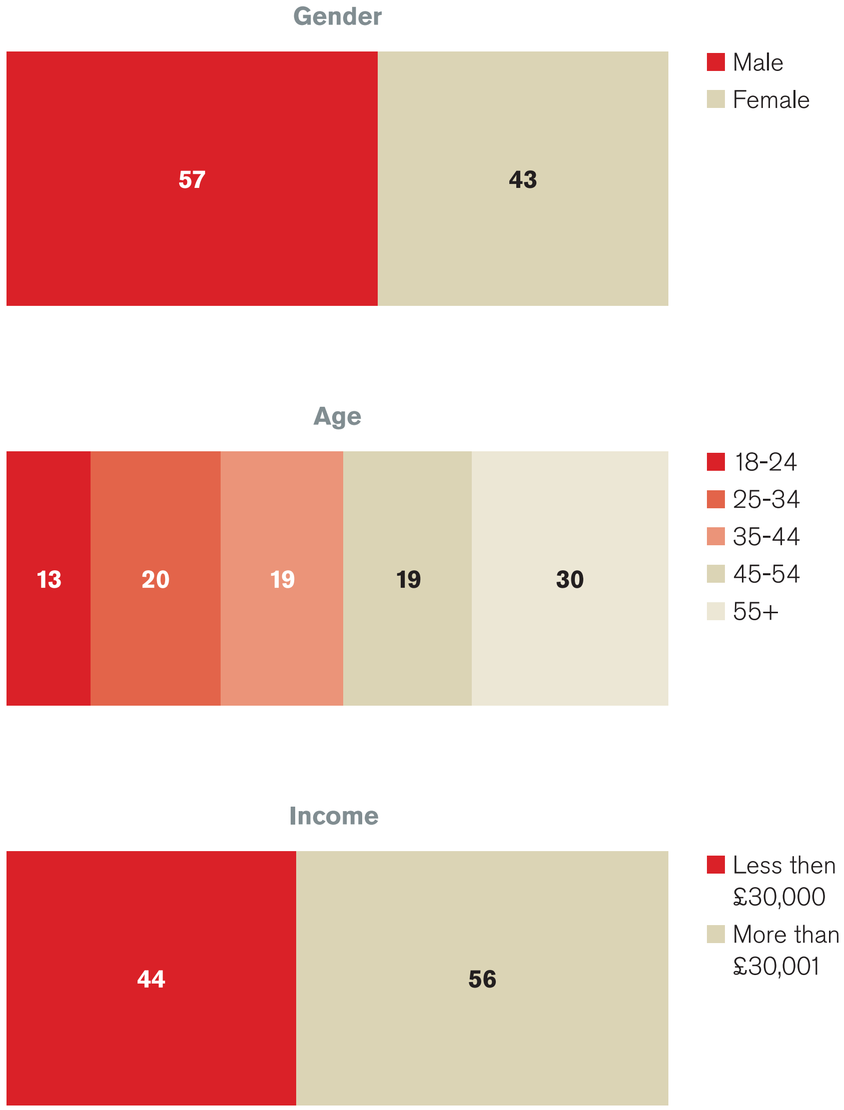
Table 2: Top 10 sports followed in Great Britain

Great Britain	Top 10 sports followed in March/April 2011 and February/March 2012 (figure in brackets represents the proportion of adults aged 18+ following each sport)	
	2011	**2012**
	Football (41%)	Football (43%)
	Formula 1 (30%)	Formula 1 (27%)
	Cricket (23%)	Rugby Union (22%)
	Tennis (21%)	Tennis (22%)
	Rugby Union (19%)	Cricket (17%)
	Athletics (18%)	Athletics (16%)
	Snooker (14%)	Snooker (15%)
	Golf (12%)	Golf (13%)
	Darts/ Boxing (9%)	Rugby League (10%)
		Darts/ Boxing/ Horse Racing (9%)
Follow = watch live or highlights coverage and/ or read about frequently and/ or talk about frequently		

57%

British sports fans are male

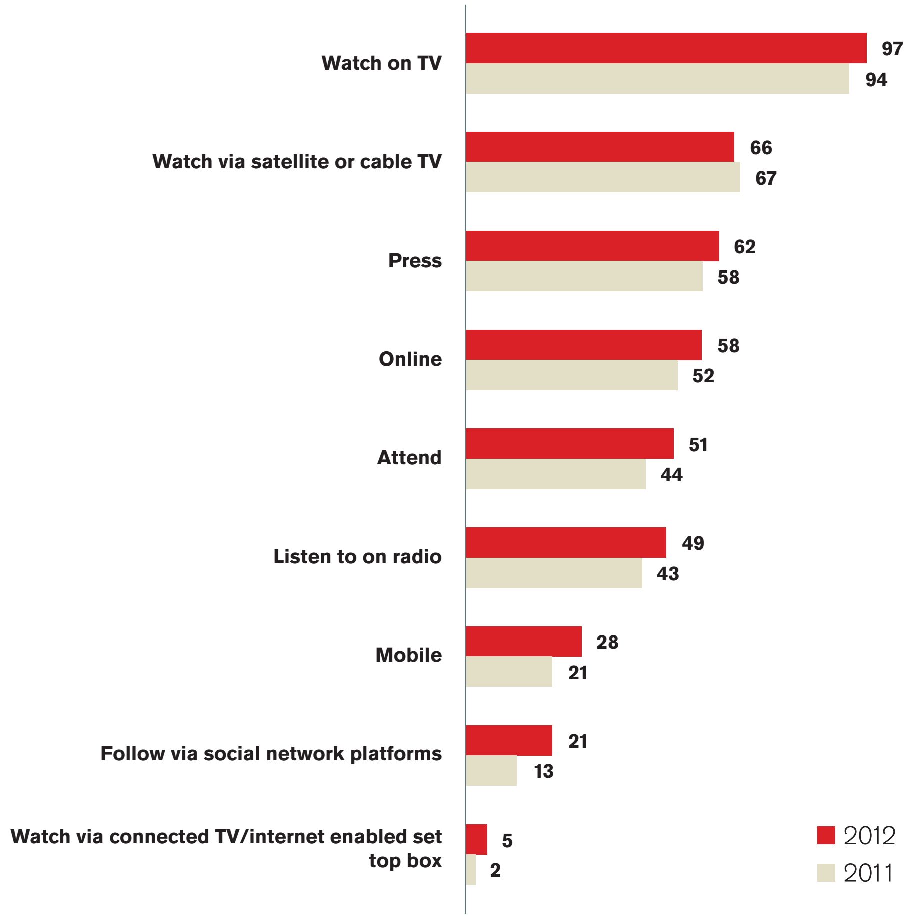
Chart 1: Profile of a sports fan
(How to read chart: 57% of sports fans in Great Britain are male)



- Sport has a greater following amongst males, older and affluent individuals in Great Britain.

Methods used by fans to follow sport in Great Britain

Chart 2: Methods sport fans use to consume sport
(% of sports fans claiming to use each method to consume sport)



Press: includes newspapers and magazines
Online: includes any form of interaction from reading articles through to watching live events on a PC / mobile
Mobile: any interaction via a mobile device such as a mobile phone, smartphone or tablet computer
Attend: includes attendance at any professional sporting event
Radio: listening on the radio but excludes listening via online radio

21%
British sports fans follow sport via social network platforms in 2012

13%
British sports fans followed sport via social network platforms in 2011

- Not surprisingly, the use of television to follow sport remains the favoured method in Great Britain.
- The use of a mobile device to consume sport has increased, with just over one quarter of sports fans now consuming sport via this method. Online following has also increased to 58%.
- Following sport via social networking platforms has increased year-on-year and now one fifth of fans claim to consume sport via this method.

64%

British football fans consume the sport online

How fans follow individual sports in Great Britain

Whilst Chart 2 provides an overview of fan engagement across all platforms, fans of some sports have a greater propensity to consume via different platforms. This next section examines popular sports in Great Britain that attract greater fan following on particular platforms.

Football following in Great Britain

- Football fans in Great Britain engage with the sport across multiple platforms. Although TV is the main method used to consume football (93% of football fans consume via this method), football fans also have a greater propensity to consume the sport online (64%), on mobile (32%) and via social networking platforms (22%).

Cricket following in Great Britain

- Cricket fans have a greater propensity to consume this sport online compared to fans of other sports where 1 in 2 follow online. This is likely driven by the fact that this sport is played in different time zones and where matches can be played over a whole day. Therefore fans are using the internet to follow cricket with 40% reading articles online and 16% listening online (only football fans have a greater propensity to read articles and listen online).

Rugby League following in Great Britain

- Rugby league fans are more likely to follow this sport across multiple platforms.
- Approximately 1 in 2 fans consume this sport online, 17% consume via a mobile device and 12% via social network platforms (only football has a greater following on mobile and social networking platforms).

Time spent per week consuming sport

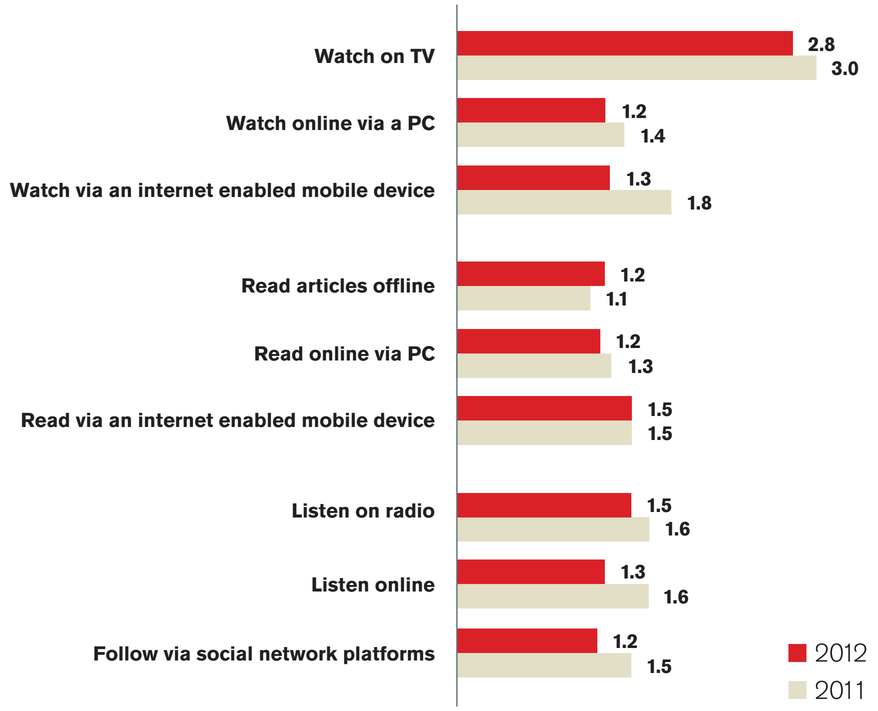
- In Great Britain, the average sports fan spends approximately 6.2 hours per week consuming sport.
- The average amount of time spent consuming sport across all platforms has declined slightly, except for reading articles in print media and reading via an internet enabled mobile device.
- TV, the means by which most fans follow sport, is consumed for approximately 2.8 hours in an average week and remains the method by which fans spend the longest amount of time consuming sport.
- All other means of following sport last between 1.2 – 1.5 hours in an average week.

6.2

hours British sports fans spend consuming sport in an average week in 2012

Chart 3: Average number of hours in a week spent consuming sport by method

(Number of hours in a week sports fans spend consuming sport by each method)



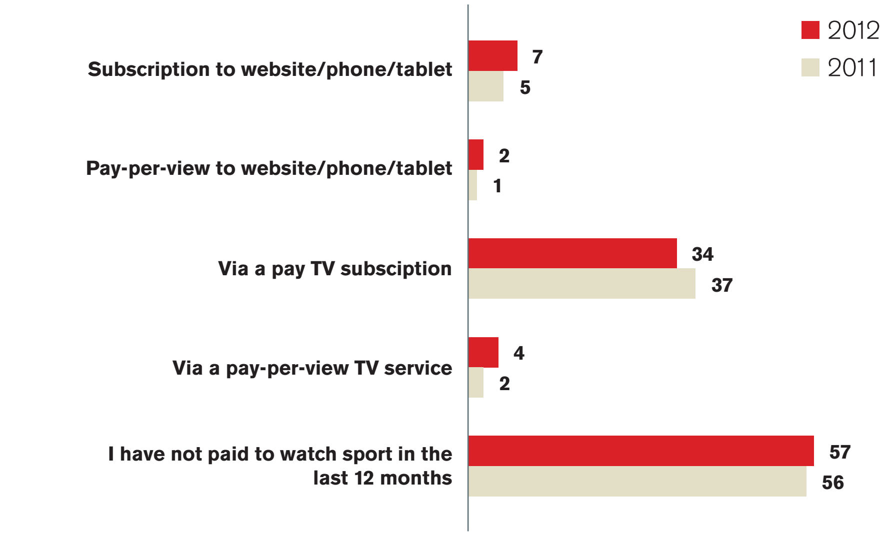
34%
British sports fans have paid to watch sport via a pay TV subscription in the last 12 months

57%
British sports fans have not paid to watch sport in the last 12 months

Paying to consume sports content

Chart 4: How fans have paid to watch sport in the last 12 months

(% of sports fans stating the way in which they have paid to watch sport in the last 12 months)

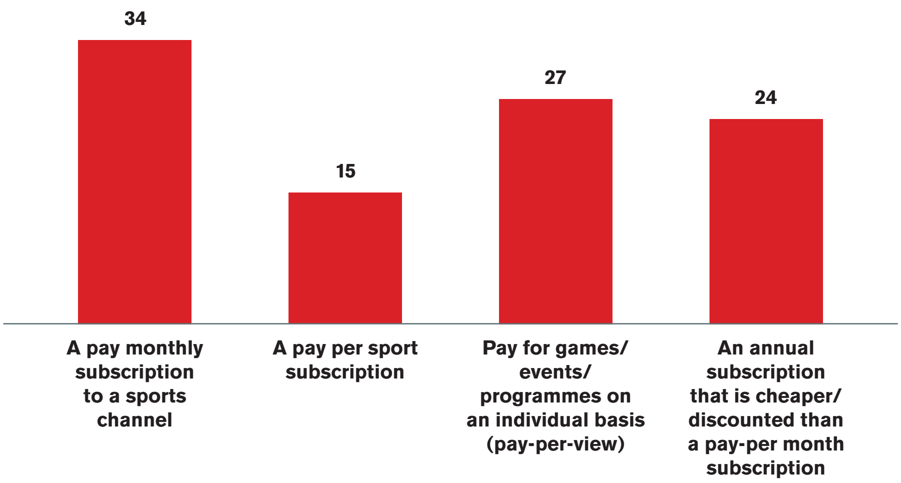


- Approximately one third of sports fans claim to have paid a TV subscription to watch sport in the last 12 months, a decline on 2011 figures, whilst those claiming to have paid a subscription to a website, mobile phone or tablet computer has increased from 5% to 7%.
- 57% of sports fans claim to have not paid to watch sport in the last 12 months, consistent with last year.

34%
British sports fans would prefer to pay a monthly subscription to a sports channel

Chart 5: Preferred way of paying for sports content if choice was available

(% of sports fans stating their preferred way to pay for sport if they had a choice)

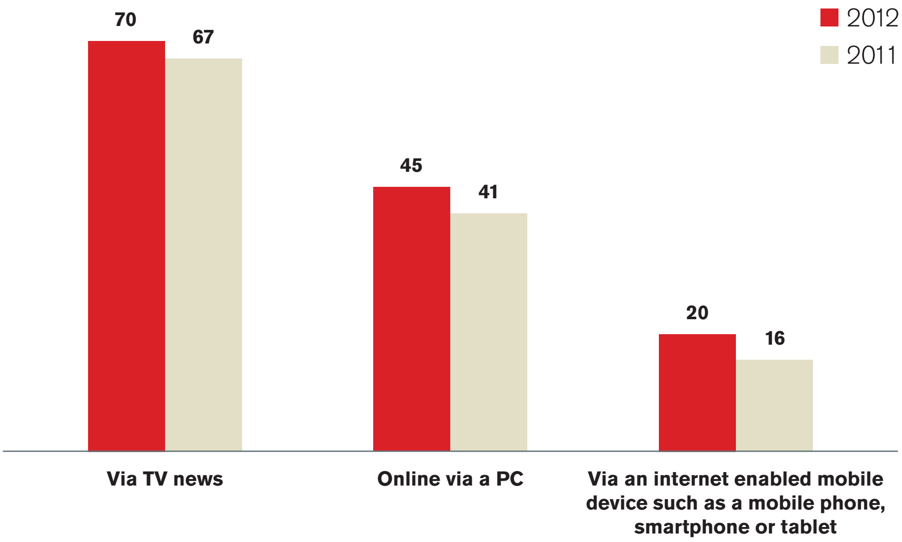


- If fans had a choice over how they paid to access sports content then just over one third would prefer to pay a monthly subscription to a sports channel.
- Paying for games / events / programmes on an individual basis (pay-per-view) are also popular and 27% state that this would be their preferred method.
- Amongst sports fans that would prefer a pay per sport subscription, football, Formula 1 and rugby union are the top 3 sports that they would pay to watch.

Accessing sports news

Chart 6: Methods used to access breaking sport news stories

(% of sports fans using each method to access breaking sports news)



45% British sports fans access breaking sports news online via a PC in 2012

41% British sports fans accessed breaking sports news online via a PC in 2011

- Television remains the method that is used by the majority of sports fans to catch up on breaking sports news stories and has increased during the last 12 months.
- The use of both online and mobile methods to access breaking sports news stories have also increased year-on-year. This is likely a reflection of the growth in sports consumption via these methods generally.
- As table 3 indicates, general news channels on TV are used more by fans than sport specific TV channels to access breaking sports news.
- Amongst fans that go online via a PC and via internet enabled mobile devices, there is an equal propensity to use either general or sport specific websites and apps to catch up with breaking sports news.

Table 3: Type of channels / websites / applications used to access breaking sports news

Method	% of sports fans who catch up with breaking sports news via each method	% of sports fans who use each method who use GENERAL TV news channel/ website/ app	% of sports fans who use each method who use SPORT SPECIFIC TV news channel/ website/ app
TV News	70	78	22
Online via a PC	45	53	47
Internet enabled mobile devices	20	50	50

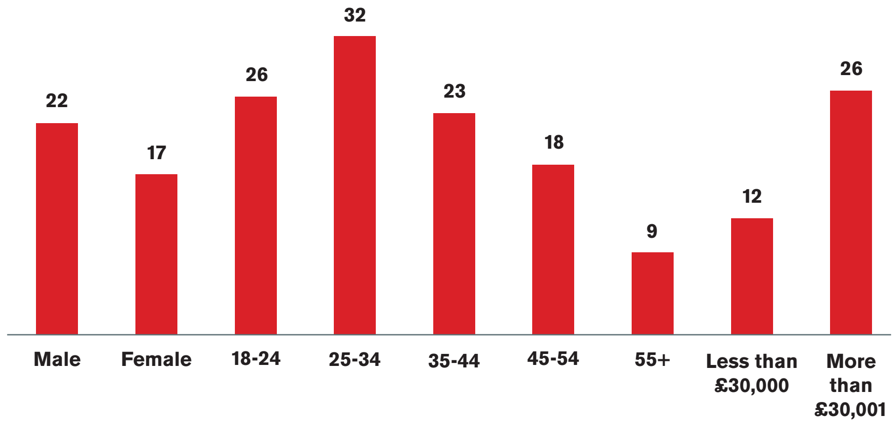
70% British sports fans catch up with breaking sports news via TV

32%

British sports fans aged 25 to 34 use a mobile device to access breaking sports news

Accessing sports news via mobile devices

Chart 7: Propensity to use a mobile device to access breaking sport news stories
(How to read chart: 22% of male sports fans use a mobile device to access breaking sports news)



- Younger sports fans are using internet enabled mobile devices to access breaking sports news stories. There is also a skew towards male and affluent fans to use these devices.

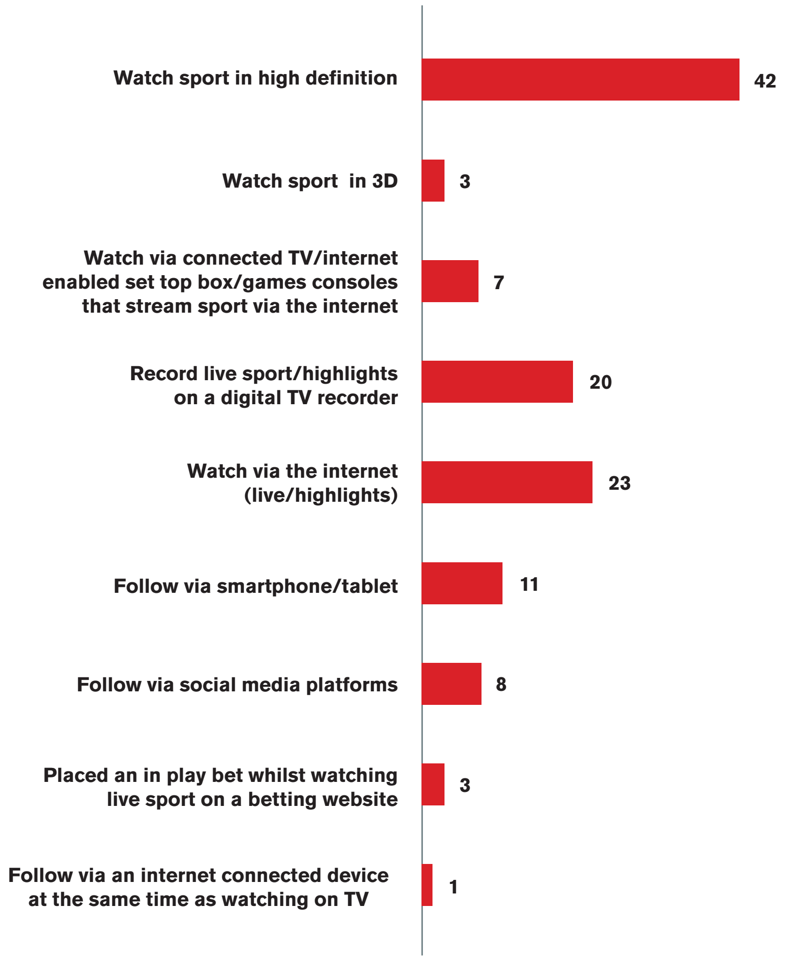
Changes in sports consumption habits over the last two years

- The biggest claimed change in sports consumption over the last two years in Great Britain is the use of high definition TV. The key driver of this increase is likely to be the inclusion of HD channels through the free to air digital TV network.
- Watching sport online is the other key change in how fans consume sport.

42%

British sports fans who started watching sport in high definition in the last 2 years

Chart 8: Ways in which sports consumption has changed in the past 2 years.
(% of sport fans claiming they now use each method to consume sport when compared to 2 years ago)



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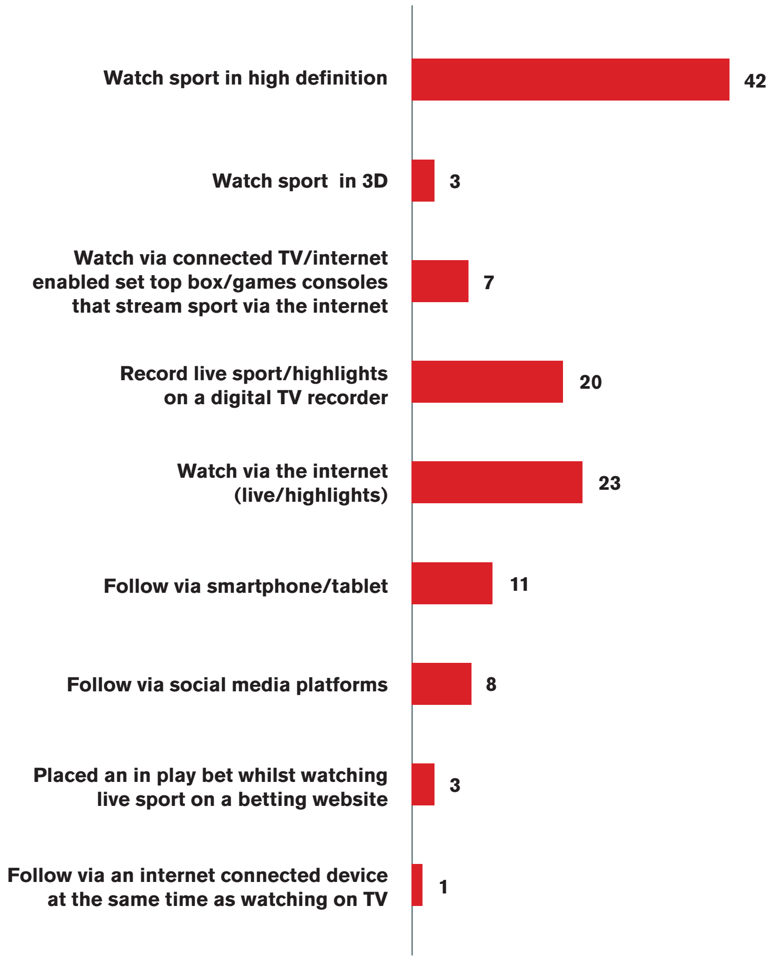


2 Sports Consumption via Different Devices and Platforms

This section provides insight into how fans consume sport content via different devices and platforms.

Table 4: Number of sports fans using each method to access sports content

Method	% of sports fans using each method to consume sport in 2011	% of sports fans using each method to consume sport in 2012
TV	94%	97%
Online	52%	58%
Mobile	21%	28%
Internet connected TV/ internet enabled set top boxes	2%	5%
Social networking platforms	13%	21%

Online consumption: any consumption of sport online via either a PC / laptop or mobile device
Mobile consumption: any consumption of sport via a mobile device such as a mobile phone, smartphone or tablet computer

21%
British sports fans use social networking platforms to consumre sport in 2012

13%
British sports fans used social networking platforms to consume sport in 2011

Table 5: Demographic breakdown of sports fans by method used to consume sport

Method	Demographic Breakdown (figures represent the proportion of sports fans for each demographic who follow sport via each of the methods)								
	Male	Female	18 – 24	25 – 34	35 – 44	45 – 54	55+	Less than £30,000	More than £30,001
TV	97%	97%	97%	97%	96%	97%	98%	97%	98%
Online	64%	51%	74%	69%	57%	58%	45%	56%	61%
Mobile	32%	24%	40%	44%	30%	22%	16%	25%	31%
Internet connected TV/ internet enabled set top boxes	5%	4%	5%	6%	2%	5%	5%	4%	6%
Social networking platforms	20%	22%	47%	32%	18%	17%	8%	21%	21%

Online consumption: any consumption of sport online via either a PC / laptop or mobile device
Mobile consumption: any consumption of sport via a mobile device such as a mobile phone, smartphone or tablet computer

74%
British sports fans aged 18 to 24 follow sport online

- In Great Britain, the demographic profile of a fan that consumes sport via the internet or on an internet enabled mobile device is similar: younger, male and with an income above £30k.
- Younger sports fans are more likely to follow sport on social networking platforms. This is unsurprising given that younger fans have a greater propensity to consume sport online. Interestingly both male and female fans are equally likely to use social networking platforms to access sports content.

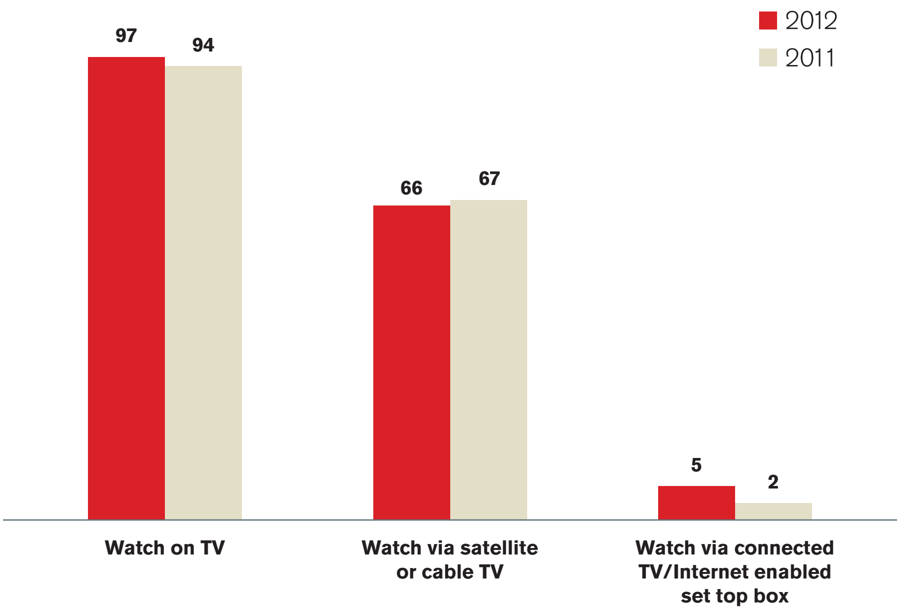
5%
British sports fans follow sport via connected TV/internet enabled set top boxes in 2012

2%
British sports fans followed sport via connected TV/internet enabled set top boxes in 2011

Consuming sport on TV

TV remains the most popular way to consume sport in Great Britain with 97% of sports fans following via this method

Chart 10: Methods sports fans use to follow sport on TV
(% of sports fans using each method)



- This year in Great Britain, the use of satellite and cable TV for following sport has remained stable. The use of connected TV/ internet enabled set top boxes has increased but is still a small market.

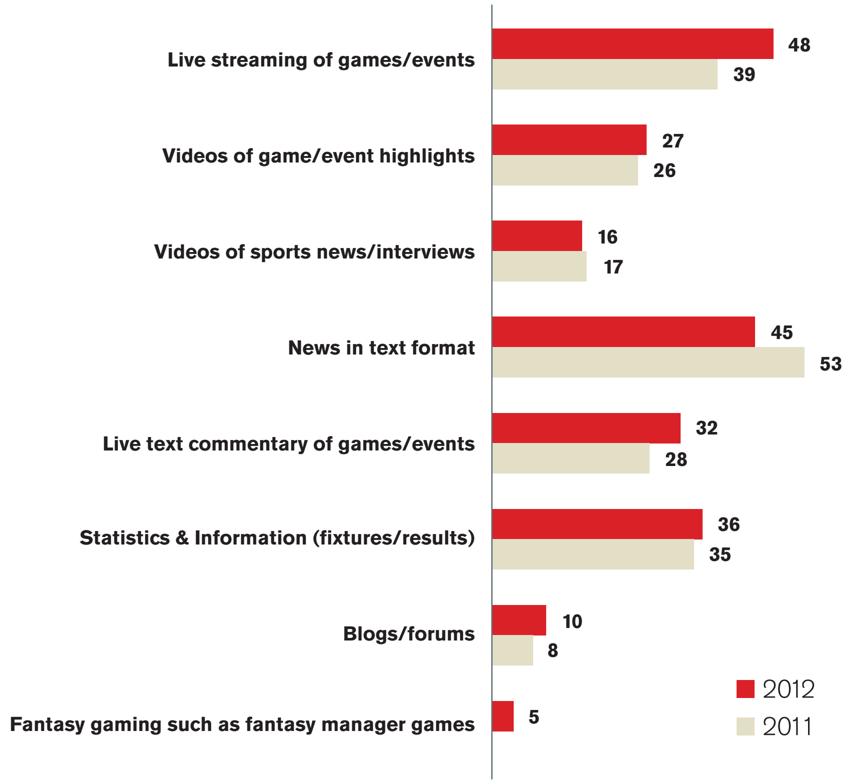
Consuming sport online via PC or mobile

- As Chart 2 identifies, the use of mobile to consume sport has increased, with just over one quarter of sports fans now consuming sport via this method. Online following has also increased with well over half of sports fans now using the internet to follow sport.

48%
online British sports fans watch live streaming of games/events in 2012

39%
online British sports fans watched live streaming of games/events in 2011

Chart 11: Sports content accessed via the internet (via PC and mobile)
(Type of content accessed by fans that access sports content online)



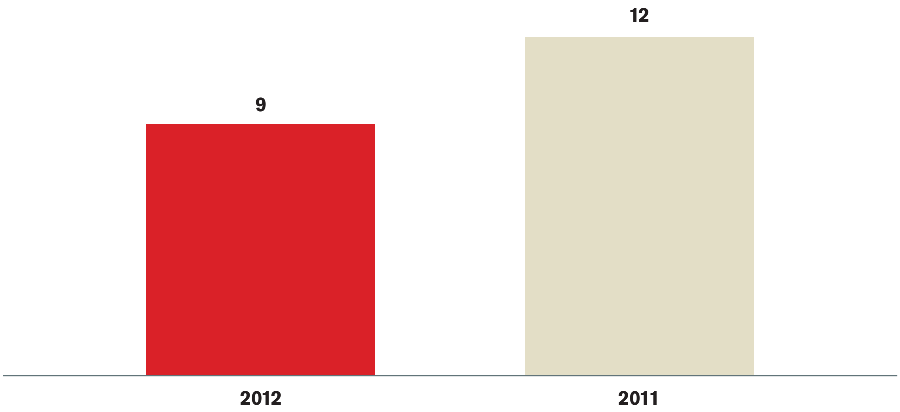
Fantasy Gaming added to the questionnaire in 2012

- Amongst fans that consume sports online, accessing live streaming of games/ events has increased significantly and has now overtaken accessing news in text format, with almost half of sport followers viewing this content. Accessing live text commentary of games / events has also increased.
- The proportion of fans accessing video content remains constant, 27% view highlights coverage and 16% view sports news or interviews.
- Despite increased demand for live streaming content, 12% of sports fans who access this content online claim to do so via unofficial websites, representing a marginal decrease from 13% of online fans in 2011.
- Those who are satisfied with the viewing quality of online sports content has increased to 69% from 62% in 2011.

9%
British sports fans state they are willing to pay for live sports content online

Paying to watch live sport online

Chart 12: Willingness to pay for live sports content online
(% of sports fans stating that they are open (top 2 on a 5 point scale) to pay for live sport content online)



- Despite live streaming of sport increasing this year, fewer fans (just 9%) are willing to pay for live content online.

Websites or applications (apps) used to access sports content online

- In Great Britain, sports broadcaster websites/apps remain the most used sites by fans that consume sports online, however their use has declined year-on-year.
- Use of all other websites/apps to follow sport has increased.

54%
online British sports fans access sport content via sports broadcasters websites or applications in 2012

Table 6: Top 5 websites/applications (apps) online sport fans use to access online content

Year	Top 5 types of website/apps used to access sport content (figure in brackets represents proportion of fans who access online content using each type of website/apps)				
2011	Sports broadcaster (58%)	Newspaper (36%)	Team / League (23%)	General (20%)	Dedicated sport (19%)
2012	Sports broadcaster (54%)	Newspaper (43%)	Team/ League (27%)	Dedicated sport (24%)	Social Networking (23%)

General: refers to websites/apps such as MSN, AOL, Yahoo
Dedicated sport: refers to websites/apps dedicated to sport but not linked to a newspaper or broadcaster. Examples being, goal.com and Kicker

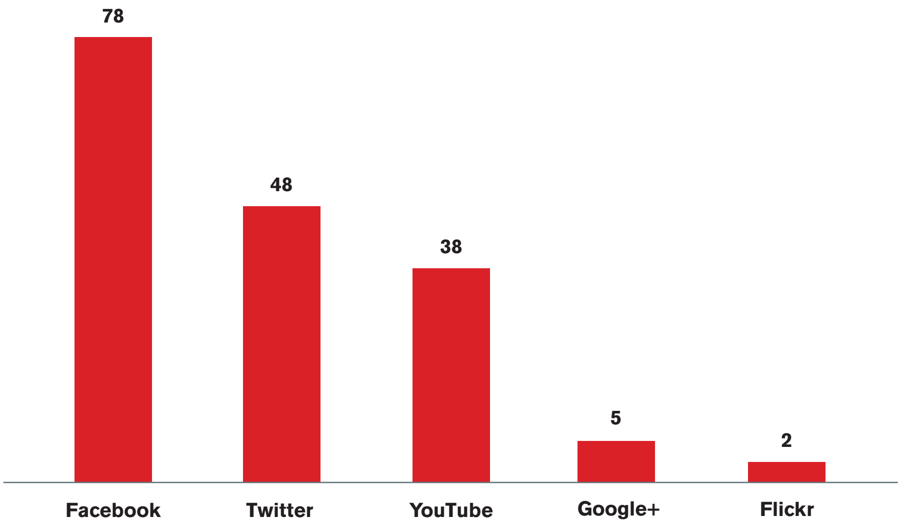
Consuming sport via social networking platforms

78%

British social networking fans who follow sport via Facebook

- As Chart 2 indicates, 21% of fans in Great Britain consume sport via social network platforms.

Chart 13: Use of social networking platforms to follow sports
(% of sports fans who follow sports via social networking platforms that use each website)



- Facebook is used by 3 out of 4 fans that follow sports on social networking platforms. 1 in 2 fans that use social networking websites to consume sport use Twitter, whilst 4 out of 10 use YouTube.
- Approximately 1 in 2 fans that use social networking platforms to consume sport are following a sports star's, team or league's page. Between one quarter and a third of fans that follow sport via this method access video content.
- News in text format and content from a sports star's, team or league's social networking page is most likely to be shared by fans that use these platforms.

50%
British social networking fans follow a sports star/s

Table 7: Content that is accessed and shared on social networking websites and reasons for following sports via this method

Great Britain	Top 5 types of content accessed and shared, and reasons for following sports content on social networking websites (figure in brackets represents the proportion of sports fans using social networking platforms to follow sport that …)				
Content Accessed	Follow sports star (50%)	Follow team / league (46%)	News in text format (39%)	Videos of game / event highlights (32%)	Videos of news / interviews (24%)
Content Shared	News in text format (37%)	Content from a sports star's social networking page (30%)	Content from team/ league's social networking page (25%)	Videos of game / event highlights (19%)	Pictures (13%)
Reasons For Following	Friends and family are on social network platforms (47%)	Can share content with friends and family (38%)	Content is available instantly (28%)	Spend more time on social networking platforms (25%)	Can aggregate all the information I want in one place (18%)

3 Attitudes to Brands that Sponsor or Advertise Around Sports

This section provides an insight into fans attitudes towards brands that sponsor or advertise around sports.

Chart 14: Agreement with following statements about brands that sponsor or advertise around sports
(% of sports fans who agree (strongly or tend to agree) with the following statements)

- Approximately one quarter of sports fans agree that they are more likely to be interested in a brand if they sponsor or advertise around sport.

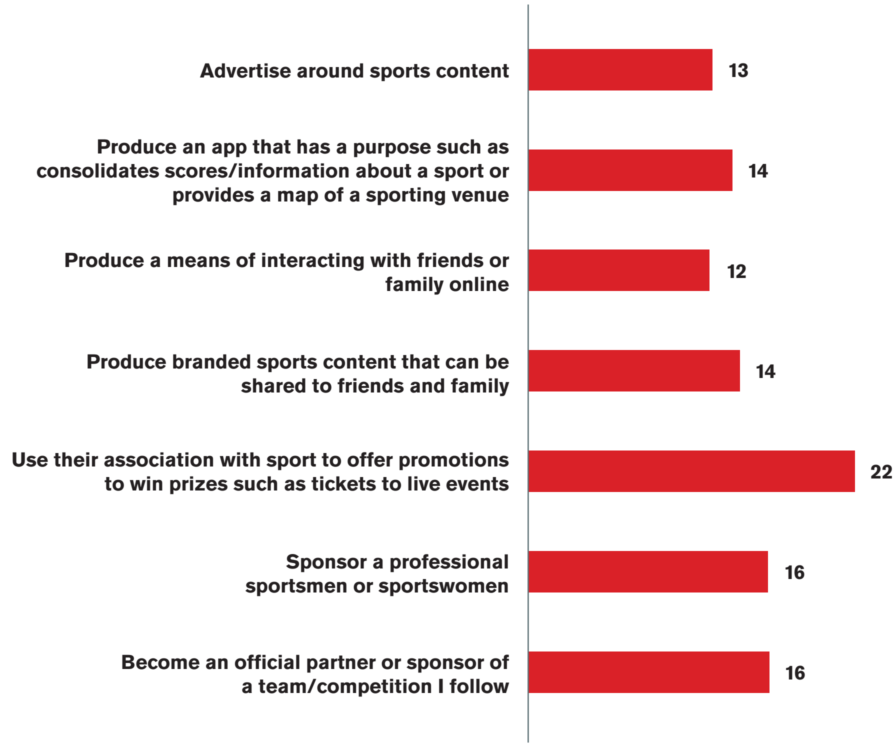
23%
British sports fans agree that they are more likely to have a positive opinion of a brand that sponsors or advertises around sports

22%

British sports fans are more likely to interact with a brand if it uses its association with sport to offer promotions to win prizes such as tickets to live events

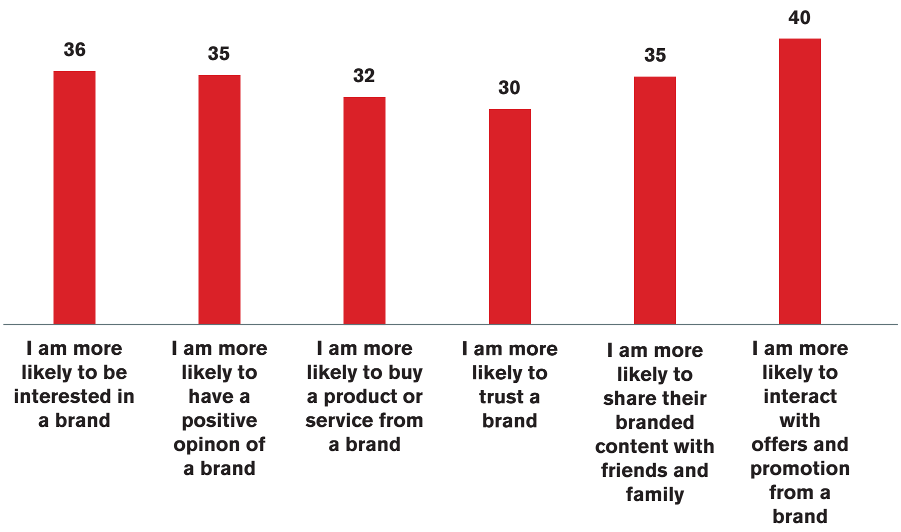
Chart 15: Interaction with brands that associate with sports

(% of sports fans who state that they are more likely to interact (e.g. share content, visit a website, visit a store or purchase a product/service) with a brand if they do any of the following)



- Between 10 – 20% of fans are more likely to interact with a brand if they use their association with sport in various ways. Unsurprisingly, fans are most likely to interact with a brand if their association is used to offer promotions to win prizes.

Chart 16: Social networking website users' agreement with statements about brands that associate with sports that they follow on social networking platforms
(% of fans who use social networking websites to access sports content who agree (strongly or tend to agree) with the following statements)



35%

British social networking fans agree that they are more likely to have a positive opinion of brands that associate with sports they follow on these platforms

- Approximately one third of fans that use social networking websites to access sports content agree with the statements about brands that associate with sports that they follow on these platforms.
- 4 out of 10 fans agree that they are more likely to interact with offers and promotions from a brand which associates with the sports that they follow on these websites.

Research Methodology

The research was conducted using Sportscope, KantarSport's syndicated research service that provides cost-effective insights into the international sports market.

Sportscope measures consumer consumption of sport, awareness and preferences within sport, attitudes towards recognised sponsorships, spend and purchasing patterns and sport participation rates across a number of international markets. This creates trends of key metrics across multiple sports, sponsorships and countries over time.

The data in this report covers the eight markets with interviews conducted online from 28th February 2012 – 9th March 2012. All interviews were conducted online, specific details are described overleaf.

Market	Sample Design and Size
Great Britain	1,028 interviews among a representative sample of adults aged 18+
France	1,004 interviews among a representative sample of adults aged 18+
Germany	1,010 interviews among a representative sample of adults aged 18+
Spain	1,003 interviews among a representative sample of adults aged 18+
Italy	1,005 interviews among a representative sample of adults aged 18+
USA	1,002 interviews among a representative sample of adults aged 18+
Brazil	1,005 interviews among a representative sample of adults aged 18+
China	1,002 interviews among adults aged 18+ living in ten key Chinese cities: Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu, Wuhan, Nanjing, Shenyang, Changsha, Xi'an.
Australia	1,006 interviews among a representative sample of adults aged 18+
Russia	1,001 interviews among a representative sample of adults aged 18+

In all markets except Brazil, Russia and China the sample interviewed represents the adults aged 18+. In Brazil and Russia the sample represents adult internet users and in China the sample represents urban adult internet users.

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