KNOWTHEFAN

The Global Sports Media Consumption Report 2014

Global Overview

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About the project partners

PERFORM creates and distributes sports content that millions of fans around the world interact with every day. PERFORM's global content collection, production and distribution capabilities, alongside industry leading digital products, are unrivalled in the market and enable PERFORM to generate revenues through licensing, advertising and subscription.

Every year PERFORM produces and distributes over 43,000 live events, over 5bn video on demand streams, 430,000 editorial articles and up to 1,600 data points for over 35,000 events across over 2,600 distribution clients.

Kantar Media Sport 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, Kantar Media Sport 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.

SportBusiness Group is committed to enhancing the effectiveness and profitability of its clients and their businesses by providing an unmatched source of high-value data, analysis, news and commentary which enables them to negotiate from positions of strength, develop more effective commercial strategies, identify new opportunities and anticipate potential obstacles to success.

With the most experienced and best-connected analysts and journalists, SportBusiness Group is acknowledged worldwide as a highly trusted source of business intelligence and informed commentary.

Our dedicated teams of experts, each immersed in their specialism, provide hard-to-get data and informed analysis of the sports media and sponsorship sectors for TV Sports Markets and Sports Sponsorship Insider respectively. Across SportBusiness Group, top quality journalism goes hand in hand with unmatched access to the people whose decisions shape the industry. This enables us to create the clearest and most coherent picture of the entire sports business universe through SportBusiness International.

Foreword

What if we are approaching a tipping point when accessing sports content on tablets and smartphones is a more common activity than watching sport on a TV screen at home?

What if one day people were no longer prepared to pay for 300 channels when they only ever watch 10?

What if European football fans began to crave data in the same way as an MLB fan in the US?

Given that nobody knows what the world will look like in five years' time, what if many of the assumptions we are now working on about sports media are wrong?

And what if every commercial decision in sport was made with the interests of the fan in mind?

In an age in which developments in technology and communications are rewriting the rule book every year, knowing the fan – what the fan does, wants to do, dreams of being able to do – is the surest, perhaps the only, way of future-proofing your business.

The pace of technological change outstrips the speed at which governments can legislate, authorities can draw up regulatory measures, multinationals can adapt their business models, or content producers – certainly those locked into three- or five-year sales cycles – can update their sales strategies.

At the time of writing, for example, a case before the US Supreme Court is pitting an internet streaming company – Barry Diller's Aereo – against virtually the entire US broadcasting industry (ABC, NBC, CBS and Fox) and two of its biggest sports leagues (NFL and MLB).

Victory for Aereo and the traditional model of US broadcasting, including the broadcasting of sport, may be thrown out the window.

Whatever the outcome, it is a landmark case. But this is what the Reuters news agency had to say about it: The Supreme Court's apparent lack of awareness about the technology that increasingly permeates the lives of everyday Americans could have real consequences as the court grapples with such issues this term as maintaining privacy in the digital age, when software is eligible for patent protection, and the future of the TV industry.

It is not the first and won't be the last time that New Media has bumped into Old Media and a nasty fight has broken out.

And if this asymmetry – between the speed of technological change and everything else – were not a challenge enough, its characteristics are different from region to region and even from country to country. This keeps media markets across the globe in a state of uncertainty that can throw up conflicts but can also provide unprecedented commercial opportunities for those who dare to surf the wave of change.
In the last few years, we have witnessed a huge uptake in the consumption of content on new technology and social media platforms – opportunities eagerly being explored by sport – without any obvious erosion of the value of traditional live TV rights.

Look at the size of some of the media rights deals that have been done in the last 12 months. They include: the extraordinary $7.65bn NBCUniversal deal to take its coverage of the Olympic Games through to 2032; a record sports-rights deal in Canada, with Rogers signing up the NHL for 12 years for $4.8bn; BT Sport in the UK paying $1.5bn for Champions League rights for just three years; and a $536m deal with the Nine and Ten networks for Cricket Australia rights.

These, and dozens of other recent deals, represented huge percentage increases for the rights-holders. In some of the deals – like the NBC and Rogers deals – sport is clearly seen as a form of insurance policy against future uncertainties.

There is, however, one thing we can be sure of: the depth of passion we have for our team, or for our favourite sport, is a constant. It is something we carry with us throughout our lives, from childhood to dotage. It creates an intensity of engagement that we experience with no other form of entertainment or media content. It creates an appetite for knowledge and information about players, teams, leagues and matches past, present and future that knows no limits. It is something which we are driven to share with others, be it at home with family, with friends in a pub or via a pithy comment on Twitter.

In a world of flux, the passion of the fan is a constant. So the starting point for anyone running a business in the sports media industry should be pretty obvious: Know The Fan.

You can start here, with the Global Sports Media Consumption Report 2014.

Frank Dunne
Editor
TV Sports Markets
(part of SportBusiness Group)

MARKET INSIGHT

Frank Dunne, Editor of TV Sports Markets, part of SportBusiness Group, discusses the development of digital media and looks at some of the trends which emerged in Know the Fan – The Global Sports Media Consumption Report 2014, with Simon Greenberg, Global Head of Rights at News Corp, and Jörg Daubitzer, Managing Director of DFL Sports Enterprises, the commercial arm of the German Bundesliga.

One of the striking patterns to have emerged in the report since its first edition in 2011 is that every year the take-up and interest in all forms of content delivered by the internet – including short-form video clips, minute-by-minute text commentary, and social networking – has increased in double-digit leaps. Yet every year, the TV screen remains the number one device for the consumption of sport.

It is natural to conclude from this that connected TV – where the two technologies meet – will play a major role in the future of sports broadcasting. And even though penetration is still relatively low in most markets, those sports fans already hooked up are seeing benefits.

The percentage of connected TV users who believe they have access to a greater choice of sport with this medium was high in countries such as Indonesia (75%), India (68%), China (62%), Russia (56%), Australia (55%) and the United Arab Emirates (53%). One reason why roll-out may be slow, however, is that not all of the sports content available online is available on connected TVs.

Rupert Murdoch's News Corp last year rolled out its BallBall service, a free app and website available in local languages in Japan, Indonesia and Vietnam. It combines short video clips of top football from around the world with editorial content from News-owned newspaper titles, such as The Sun, The Times and The Sunday Times. Fans can access the content on smartphones, tablets and computers but not on connected TVs, something which News Corp's Global Head of Rights, Simon Greenberg, puts down to it being such a new medium.

"At the moment, a service like BallBall, which is on devices enabled by the internet, isn't allowed on a connected TV. That anomaly is in all the rights agreements. I suspect that in the next round of rights that anomaly will get cleared up in some shape or form. It sticks out like a sore thumb and nobody can really give you a proper explanation as to why it is there. The development of technology is quicker than the development of rights agreements. Connected TV is one of the things that has got caught up in that. There are other things too. For example, the ability of high quality DRM [Digital Rights Management]-protected video to be played successfully on all Android mobile phones is still a problem."

Jörg Daubitzer, Managing Director of DFL Sports Enterprises, the commercial arm of the German Bundesliga, points out that with connected TVs enabling big-screen HD coverage to be complemented by readable on-screen information, the sports offering becomes more attractive both for the passive fan who is happy with a sit-back experience and the data-hungry fan who wants something more interactive.

He echoes the view, however, that the medium is still a long way from delivering the complete experience for sports fans.

"I don't consider this a game changer," he said, "but an opportunity to widen the offerings to the fan. It is happening slowly because: a) it takes time to change consumer behaviour; b) suitable offerings have to be developed; and c) it depends on the expansion of high-speed infrastructure. To make progress in these three areas takes time."

A second trend which has stood out in all four editions of the report is the growth in consumption of sports content of all kinds on the internet at the expense of print. Indeed, the 2014 report marks something of a watershed. For the first time, in all markets surveyed, online was the second most popular way to access sport, behind TV and ahead of print. Given that newspapers have been covering sport for well over a century and the internet was not widely available until the 1990s this is not a development to underestimate.

Newspaper publishers around the world have been having to completely rethink what a newspaper is – or should be – in the digital age. Greenberg argues that News Corp, which also uses sports clips as part of the premium online versions of its UK newspapers, is ahead of the curve on this.

"The fundamental challenge for News Corp is the migration from print to digital. We see sport as one of the key verticals which can underpin that migration and provide sufficient premium and exclusive content. Sport gives you content with great time value and short-form clips complement the written word particularly well as a package," he said.

"The thing which is common across all of the markets where we operate is that we think this is a trailblazing approach. Nobody has really attempted to combine short form premium highlights with the written word. And the written word is as important as the video content. That is our heritage. It is the combination of the two that we believe will be a very potent product in the future."

Another area of rapid growth has been in the consumption of sports content via social media platforms. In the 2014 report, the consumption of sport via social networking platforms increased in all markets that were previously surveyed (except Turkey where it has decreased slightly).

The number of hours spent by people accessing sport on social networking sites has reached remarkable levels when compared with the time spent watching sport on TV. As with the print/online comparison, the point has to be underlined that we are comparing a way of consuming sport which is 70 years old with one which didn't exist a few years ago.

In seven of the 16 markets surveyed, fans are spending at least two hours per week consuming sport this way. These include India (2.6 hours), Brazil (2.5), Turkey (2.3), the UAE (2.2), Italy (2.5) and China (2.1) and Spain (2.0).

Rights-holders and media companies are increasingly looking at ways to work social into the overall commercial offering. As Greenberg points out, the advantages of doing so are great.

"Social media is absolutely fundamental and at the heart

Simon Greenberg
Global Head of Rights, News Corp

Simon Greenberg is the Global Head of Rights for the new News Corp, the publishing company created in June 2013 from the split of the old News Corporation, and has been heavily involved in the company's recent digital football rights purchases.

Previously he was an Executive Member of News Corporation's Management and Standards Committee, a role he moved to in July 2011 from his position as Director of Corporate Affairs at News International, in order to deal with the phone hacking crisis and all its related issues.

Prior to that, Simon was Chief of Staff for the England 2018 World Cup bid and Communications and Public Affairs Director for Chelsea Football Club. His career began as a journalist working for the Mail on Sunday, the News of the World and the Evening Standard.

Jörg Daubitzer
Managing Director, DFL Sports Enterprises

Jörg Daubitzer has been the managing director of DFL Sports Enterprises, the commercial arm of the Bundesliga, the German football league, since August 2010.

He has been a key member of the management board since the founding of the DFL subsidiary in September 2008, helping to transform the commercial performance of the league and develop the Bundesliga into one of sport's most instantly recognisable brands.

From October 2008 to July 2010, Jörg was chief operating officer of DFL Sports Enterprises. From July 2001 to September 2008, he was commercial director of the DFL Deutsche Fussball Liga, the league body. From January 1993 to June 2001, he worked in the commercial department of the national football federation, the Deutscher Fussball-Bund.

IN TERMS OF GROWING YOUR AUDIENCE AND GETTING THEM TO STICK WITH YOU IN FUTURE, SOCIAL MEDIA IS A VERY GOOD AND TARGETED MARKETING TOOL. IT IS FAR MORE EFFECTIVE THAN TRADITIONAL ADVERTISING

of growing our audiences and therefore growing our revenues. The connectivity you get with the user, the speed you can get to the user, the way you can target the football fan. For example, Cristiano Ronaldo has one of the biggest Facebook followings in the world. If you want to target everyone who has expressed a like for Cristiano Ronaldo in Indonesia you can. It might cost you quite a lot of money, because there are a lot of them. But in terms of growing your audience and getting them to stick with you in future, it is a very good and targeted marketing tool. It is far more effective than traditional advertising."

But harnessing social media in the right way presents certain challenges for businesses. Social media is largely, though not exclusively, a passion of the young. And most of the companies in the sports media value chain are run by fortysomethings upwards.

"There is a generational issue around social media," Greenberg admits. "One of the things which we found, and which hopefully we are beginning to do successfully, is that you have to recruit people that understand it. That means recruiting much younger people and giving them management roles in your organisation that maybe in years gone by you wouldn't have considered. And I think that this is a hugely positive thing."

Know The Fan 2014 has highlighted certain clear, across-the-board trends in sports media consumption, but one of the striking things of the report every year is just how big the differences can be in certain behaviours from market to market. The reasons for this are many but it does beg the question of whether any sports-rights holders are really tailoring their sales strategies to the specifics of a local market. Very often, selling on a "market-by-market" basis merely involves creating a single Invitation to Tender document which allows for bids for exactly the same content packages on a pan-regional or single-market basis.

As Greenberg suggests: "In terms of the kind of fees that rights-holders - particularly in football – are expecting to generate in these emerging markets, they maybe should take a little more time in understanding the idiosyncrasies of each individual market when trying to determine what

someone might pay. In order for your partners – be it the Premier League, La Liga, the Bundesliga or whoever – to be able to monetise their product, and to encourage operators to come back the next time and pay the same or even more, there should be a little bit more of an understanding of individual markets and the capabilities of those individual markets in terms of coping with the rights package and whether that package is structured in a way that is exactly right for that market or not. It is quite a difficult and time-consuming exercise on a country-by-country basis so this is not a criticism of the rights-holders, but the amount of money being spent now you would think that maybe some more research could be done into it."

It is a point that Daubitzer accepts, albeit with some qualifications. "New technologies provide the opportunity to consume sport in various individual ways and offerings have to be designed to satisfy this demand. Sellers can, of course, respond to local differences but this also depends on the technical development in each market, the infrastructure in the relevant countries and the fit of pan-regional media groups' activities." Daubitzer also accepts that in many areas of responding to the changing needs of fans, from the provision of data around media content to having stadiums geared to second-screen activities during sports events, the US is ahead of Europe. "The US professional sports leagues and their fans historically have a high affinity to data and statistic usage, which is still a developing field in Europe. I think that the importance of wi-fi access in stadiums will increase because it offers a wide range of entertainment and commercial opportunities. The US is, here again, the frontrunner, whereas in Europe attractive offerings still have to be developed."

In terms of responsiveness to rapidly changing consumer habits the responsibility is not down only to rights-holders and broadcasters, Greenberg argues.

"I think that technology companies need to come to the party a little bit and understand how rights-holders are selling their content and how sometimes people who are buying that content are strait-jacketed by failures in the technology platforms. That is the case with video on Android. The Android issue for platforms who are looking to exploit short-form video clips and live streaming is becoming a big issue. The ability to be able to play good quality video on Android without the use of an app to deliver the necessary DRM and geo-blocking protections around it is problematic, especially in emerging markets which are seeing the largest increases in the value of rights – Asia in particular. The dominant mobile device experience in Asia, including more mature markets such as Japan, is browser based, not app based."

GLOBAL OVERVIEW


BRIDGESTONE
PUMA

Introduction

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

This year the report covers sixteen global markets, fourteen of which, Australia, Brazil, China, France, Germany, Great Britain, India, Indonesia, Italy, Japan, Russia, Spain, Turkey and the USA were monitored last year, whilst South Africa and the UAE are covered for the first time this year. In all markets 1,000 interviews were conducted online in February 2014. The sample interviewed in Australia, France, Germany, Great Britain, Italy, Japan, Spain, the UAE and the USA represents adults aged 18+.

In Brazil, India, Indonesia, Russia, South Africa and Turkey the sample represents internet connected adults aged 18+ and in China the sample represents urban internet connected adults aged 18+. It is important to note that throughout this report, responses to questions around online consumption in these markets may appear slightly higher due to the sample being taken from engaged online users.

The report aims to show how, over 4 years, fan engagement with sport has continued to evolve. In 2014, online is established as the second most popular method behind TV that fans use to consume sport across all sixteen markets surveyed.

Mobile and social media consumption of sport has also continued to grow in the majority of markets previously surveyed. With the number of devices available, this year's report also looks at the content accessed by fans on second screens whilst they are watching sport on TV.

The report analyses the specific devices used by fans to follow sport online and the range of sports content consumed, with live streaming, highlights clips, sports news in text format and live text commentary all popular.

This report is the result of a collaboration between digital sports media company PERFORM, research agency KantarSport, and industry leading sports media company SportBusiness Group.

SPORTS CONSUMPTION OVERVIEW

1bn

sports fans surveyed across all markets

16

Number of markets covered in 2014 report

37%

of sports fans in Germany would choose pay-per-view when paying for content

Mobile consumption of sport in Italy is now

50%

1st

Football is the most popular sport followed in 9 out of 16 markets

1st

Television remains the number 1 method for following sport in all markets

48%

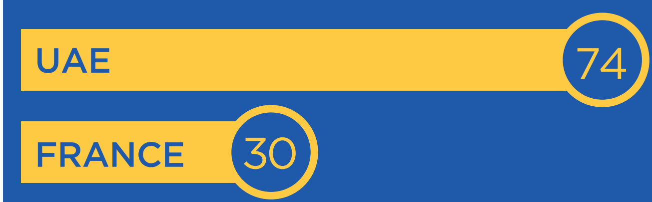
of sports fans in the US use computers to catch-up with sports news stories

2nd

Tennis is now the second most popular sport followed in GB

74%

of sports fans in the UAE consume sport via mobile, vs 30% in France



Growth in number of hours spent per week consuming sport in Spain

56%

of fans in Great Britain using a second screen device access live text commentary

49%

of sports fans in the US follow NFL

2nd

Online is now the second most popular method to consume sport across all markets

35%
of US sports fans consume sport via social networking platforms

1st
YouTube is the most popular social network to follow sport in Russia

66%
of fans in Australia seek sports news about international sports competitons

12.3
hours spent per week by Indonesian sports fans consuming sports content

34%
of sports fans in China consume sport via connected TV

1bn

SPORTS FANS SURVEYED ACROSS ALL MARKETS

Sports Consumption Overview

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

Size of sport following

The size of sport following in the sixteen markets surveyed in 2014 ranges from 65% of the adult population in France (representing approximately 33m people) to 93% of the internet connected population in India (representing approximately 93m people). The largest sports fan market surveyed is China, with upwards of 281m sports fans, whilst the UAE represents the smallest sports fan market surveyed, with over 3m sports fans. Combined, the total sports fan population across the sixteen markets surveyed represents upwards of 1bn people.

Figure 1: Size of sport following in each market

% of adult population claiming to follow sport in...

	2011	2012	2013	2014	Approximate number of adult sports fans in 2014
AUS	N/A	73	77	74	12,800,000
BRA	86	84	82	82	58,100,000*
CHN	92	90	97	91	281,500,000**
FRA	63	68	65	65	33,300,000
GER	80	79	78	77	52,300,000
GBR	70	73	73	73	35,500,000
IND	N/A	N/A	95	93	93,300,000*
IDN	N/A	N/A	90	90	33,700,000*
ITA	87	86	82	86	44,000,000
JPN	N/A	N/A	74	73	77,500,000
RUS	N/A	84	77	84	52,000,000*
RSA	N/A	N/A	N/A	86	4,800,000*
SPA	84	85	82	82	31,800,000
TUR	N/A	N/A	88	85	21,300,000*
UAE	N/A	N/A	N/A	92	3,700,000
USA	73	74	71	70	168,900,000

Follow = watch live or highlights coverage and/ or read about frequently and/ or talk about frequently

* Brazil, Russia, India, Indonesia, South Africa and Turkey: population size used for calculation is number of adult internet users. This reflects the sample used during the survey fieldwork.

** China: population size used for calculation is number of urban adult internet users. This reflects the sample used during the survey fieldwork.

Top 3 sports followed in each market

Football is the most popular sport followed in nine of the sixteen markets surveyed and is the second most popular sport in three other markets. As per 2013, there are approximately 466m football fans across all of the markets surveyed. In Russia, the percentage of the population following football has remained consistent year on year; however, figure skating has replaced it as the most popular sport followed in 2014. The Sochi 2014 Winter Olympics is likely to have increased interest in winter sports in Russia. The success of the Russian figure skating team at these games is also likely to have had an impact on fan interest.

466m

FOOTBALL FANS ACROSS 16 MARKETS

Formula 1 continues to retain a large following in Brazil and the Western European markets surveyed (except France). Behind football and Formula 1, the third most popular sports in Western Europe vary per market, with boxing popular in Germany, Moto GP in Italy and tennis in Spain. The popularity of tennis in Great Britain has continued to increase this year, and it is now the second most popular sport ahead of Formula 1. The size of tennis following in Great Britain has increased from 21% of the population claiming to follow in 2011 to 27% in 2014, highlighting the impact that national success can have on a sport's popularity.

Cricket is the most popular sport in three of the markets surveyed (Australia, India and South Africa) where approximately 8 out of 10 of the population in India claim to follow the sport. Cricket is also popular in the UAE (first surveyed in 2014), where it is the second most popular sport followed behind football.

In China, table tennis has replaced basketball as the most popular sport in 2014. Whilst the position of these top 3 sports has altered this year, they still remain the most followed sports. As per previous years, the big three American sports (NFL, baseball and basketball) continue to be the most popular in the USA.

Figure 2: Top 3 sports followed in each market

Top 3 sports followed in each market in February 2014 (figures in brackets represent the proportion of adults aged 18+ following each sport)

AUS	Cricket (35%)	Australian Rules Football (32%)	Tennis (29%)
BRA	Football (66%)	Volleyball (43%)	Formula 1 (39%)
CHN	Table Tennis (51%)	Badminton (50%)	Basketball (47%)
FRA	Football (32%)	Tennis (24%)	Rugby Union (22%)
GER	Football (50%)	Formula 1 (32%)	Boxing (24%)
GBR	Football (44%)	Tennis (27%)	Formula 1 (25%)
IND	Cricket (79%)	Tennis (47%)	Football (45%)
IDN	Football (66%)	Badminton (57%)	Moto GP (42%)
ITA	Football (56%)	Formula 1 (37%)	Moto GP (34%)
JPN	Baseball (33%)	Football (27%)	Figure Skating (26%)
RUS	Figure Skating (49%)	Football (41%)	Ice Hockey (40%)
RSA	Cricket (51%)	Football (35%)	Athletics (33%)
SPA	Football (62%)	Formula 1 (45%)	Tennis (42%)
TUR	Football (65%)	Basketball (48%)	Swimming (35%)
UAE	Football (55%)	Cricket (42%)	Tennis (32%)
USA	NFL (49%)	Baseball (31%)	Basketball (28%)

Follow = watch live or highlights coverage and/ or read about frequently and/ or talk about frequently

1in2

FANS IN ITALY CONSUMES SPORT VIA MOBILE

Methods used by fans to follow sport

Television remains the primary method through which fans follow sport, where across all markets upwards of 90% of fans use this method.

For the first time in 2014, online is now the second most popular method to consume sport across all markets surveyed (it is equal second with print media in Germany). In 2011, online was already established as the second most popular method in Brazil, China and the USA. However, in Western Europe, print media was used by slightly more fans than the internet. Over time, this has changed and online consumption ranges from 1 in 2 fans in Japan to 86% of fans in the UAE.

Consumption of sport via mobile devices has increased in the majority of markets this year. The most notable growth has been seen in Western Europe where, for example, mobile consumption of sport in Italy is now 50%, compared to 37% in 2013. Similarly, in Spain, mobile devices are used by 46% of fans to follow sport this year, which compares to 39% in 2013 and 20% in 2011.

The use of social networking platforms to consume sport has increased in all markets that were previously surveyed except Turkey. The growth in use of social networking platforms to follow sport varies per market, where use has increased slightly in Brazil for example, but grown significantly in other markets such as the US (35% of fans consume sport via these platforms in 2014 compared to 25% in 2013).

Whilst more fans are using digital methods to consume sport, traditional methods such as print media still remain an important means through which fans follow sport.

Figure 3: Methods sport fans use to consume sport

Methods used to consume sport (figures represent the proportion of sports fans using each method to consume sport in 2014)

	TV	Online	Print	Attend	Radio	Mobile	Social Network Platforms
AUS	96	62	57	52	46	41	34
BRA	92	81	65	64	53	59	51
CHN	94	81	57	50	50	64	43
FRA	96	53	35	37	32	30	21
GER	96	51	51	39	37	29	23
GBR	95	61	59	51	42	39	26
IND	94	85	84	72	66	76	64
IDN	96	83	80	58	53	67	60
ITA	95	67	60	56	42	50	38
JPN	90	50	48	36	21	19	12
RUS	95	76	38	32	34	48	33
RSA	94	72	69	61	60	57	45
SPA	96	67	62	45	52	46	35
TUR	93	81	71	72	56	68	62
UAE	92	86	73	68	62	74	65
USA	94	68	50	52	41	42	35

Print: includes newspapers and magazines

Online: includes any form of interaction online (includes Mobile) from reading articles through to watching live events on a computer/ laptop computer / mobile

Mobile: any interaction via a mobile device such as a smartphone or tablet computer.

Mobile in 2013 and 2014 includes fans that follow via social network platforms and play fantasy gaming on a mobile device

Attend: includes attendance at any professional sporting event

Radio: Radio in 2014 includes listening to a radio station or sports programme such as a podcast (2011 – 2013 separated listening via a radio and online)

68%

OF FANS IN THE UAE ATTEND EVENTS

18.4

NUMBER OF HOURS INDIAN SPORTS FANS SPEND PER WEEK CONSUMING SPORT

13.3

HOURS TURKISH SPORTS FANS SPEND CONSUMING SPORT PER WEEK

Time spent per week consuming sport

The time spent following sport ranges from 4.5 hours per average week in Japan to upwards of 18 hours in India. Fans in Asia (excluding Japan) typically spend a longer amount of time consuming sport in a week than fans in Western Europe, the US and Australia. This difference in time spent is driven by a combination of fans in Asia spending more time consuming sport via digital methods, and fans are more likely to consume sport via a number of methods.

Figure 4: Hours spent per week consuming sport

Average number of hours sports fans spend per week consuming sport

	2011	2012	2013	2014
AUS	N/A	6.3	8.5	8.9
BRA	9.8	10.4	11.9	14.0
CHN	10.2	11.7	14.6	11.6
FRA	4.1	3.9	5.3	5.0
GER	4.5	4.1	5.5	5.8
GBR	6.0	6.2	8.1	7.5
IND	N/A	N/A	19.1	18.4
IDN	N/A	N/A	11.2	12.3
ITA	6.6	5.8	8.7	9.8
JPN	N/A	N/A	4.5	4.5
RUS	N/A	6.8	8.0	7.6
RSA	N/A	N/A	N/A	10.4
SPA	5.9	7.2	9.2	10.1
TUR	N/A	N/A	15.2	13.3
UAE	N/A	N/A	N/A	15.0
USA	6.2	8.1	8.3	7.7

Please note: 2013 and 2014 includes time spent placing a bet and playing fantasy gaming such as fantasy manager games

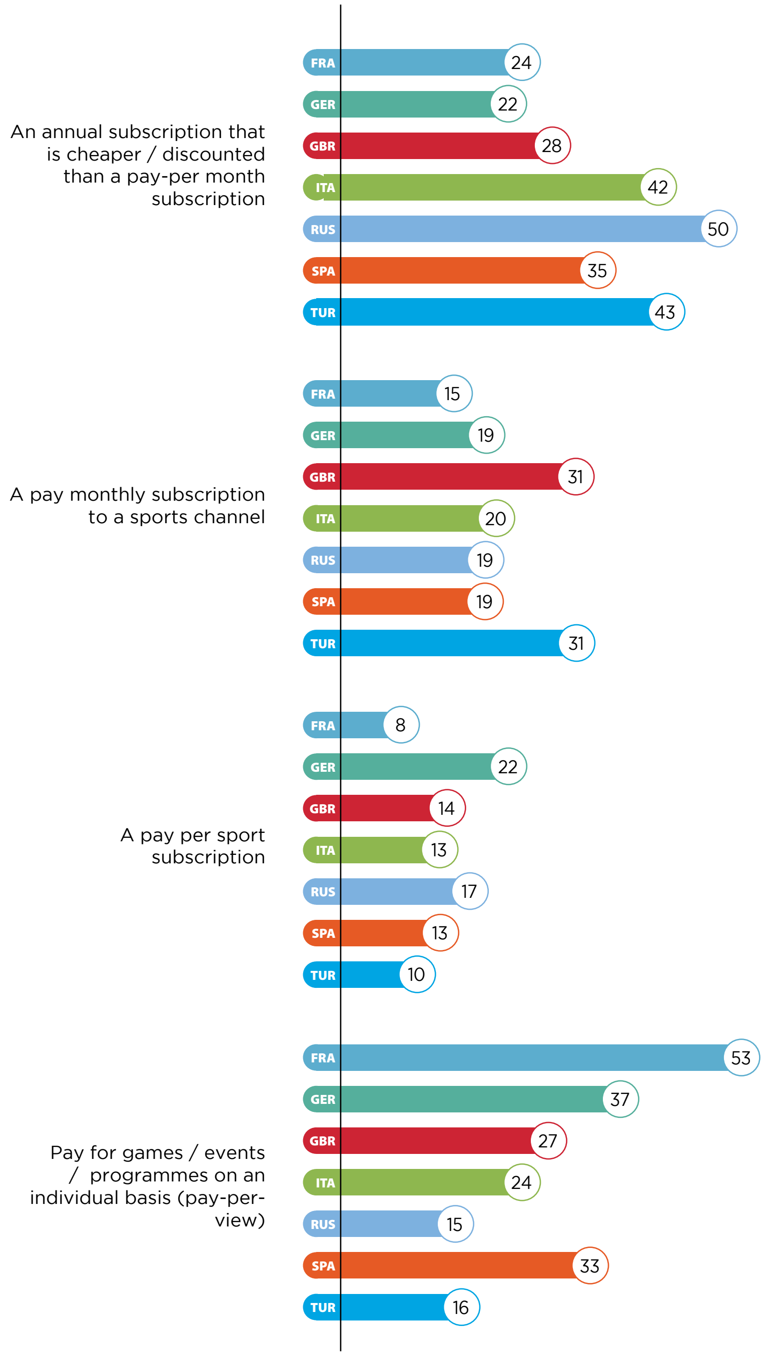
*2014 includes listening to a radio/sports programme as one activity whereas last year listening to a radio and online were 2 separate activities

Preferred way to pay for sports content

In Europe, a subscription, either pay monthly or annually to a sports channel is preferred by upwards of 1 in 2 fans, except in France and Germany. In France, approximately 1 in 2 fans would instead prefer to pay for sports content via a pay-per-view method. In Germany, pay-per-view is also the most preferred method, with 37% of fans choosing this if given the choice. Payment preferences amongst fans in Europe have remained generally consistent over the previous 4 years.

Figure 5: Preferred way of paying for sports content if choice was available – European Markets

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



1in2

FANS IN EUROPE WOULD PREFER A SUBSCRIPTION TO A SPORTS CHANNEL (EXCEPT IN FRANCE & GERMANY)

37%

OF FANS IN GERMANY WOULD CHOOSE PAY-PER-VIEW SPORTS CONTENT IF GIVEN THE CHOICE

1in5

FANS IN JAPAN WOULD PREFER A PAY-PER-SPORT SUBSCRIPTION IF GIVEN THE CHOICE

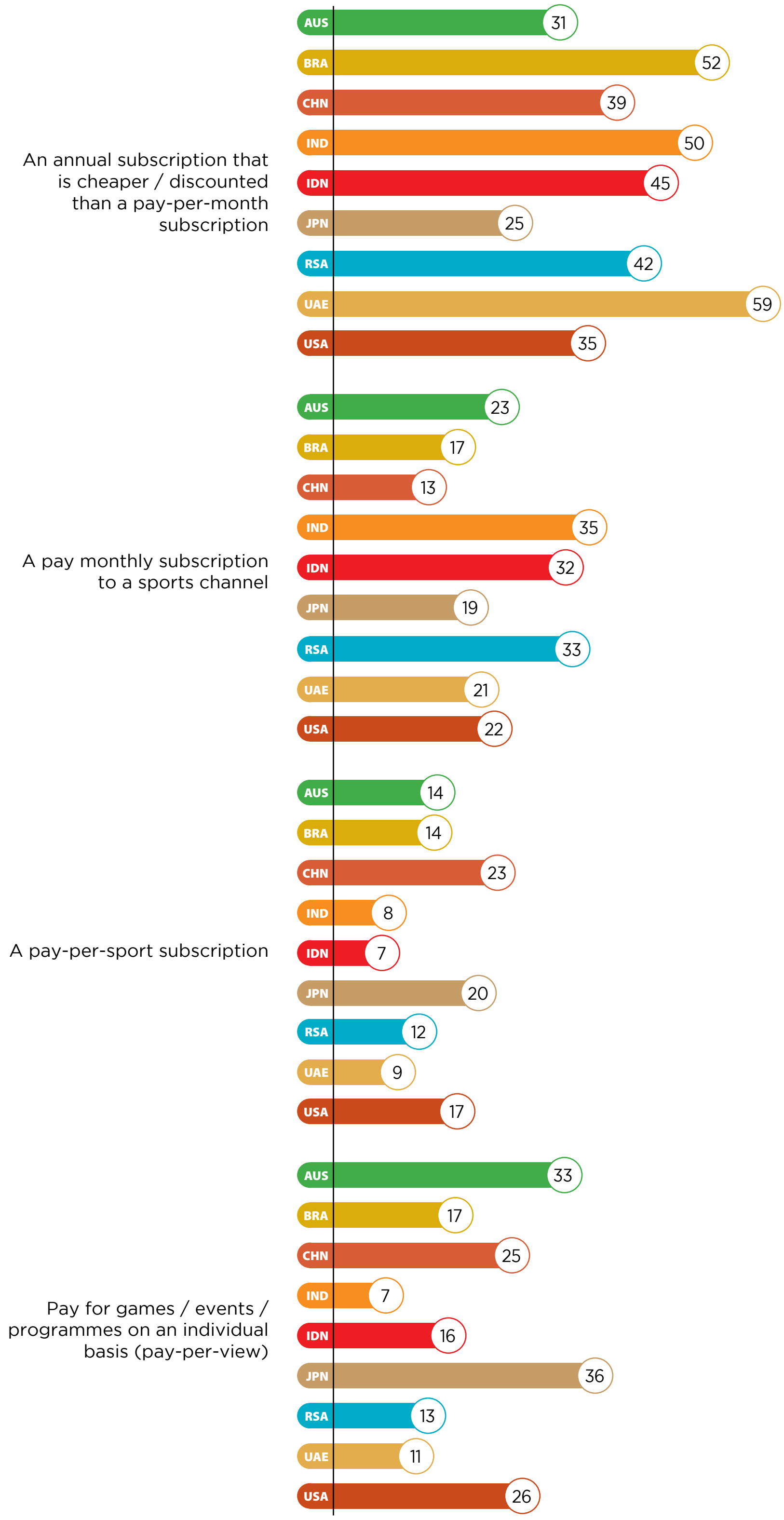
35%

OF FANS IN INDIA WOULD PREFER A PAY MONTHLY SUBSCRIPTION TO A SPORTS CHANNEL IF GIVEN THE CHOICE

Outside of Europe, a subscription service is also the most preferred method of payment, if fans were given a choice. As per 2013, interest in a pay-per-view method is most prevalent in Australia, China, Japan and the US, whilst Chinese and Japanese fans show the greatest interest in a pay-per sport option.

Figure 6: Preferred way of paying for sports content if choice was available – Rest of the World Markets

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



Accessing sports news

In the markets surveyed, fans typically use 1 to 2 methods to catch up with sports news stories, where unsurprisingly, television is the main method that sports fans use. Also popular are computers/laptop computers whilst mobile device use for this content ranges from 18% of fans in Japan to 55% in China.

Figure 7: Methods sports fans use to catch up with sports news stories

(figures represent the proportion of sports fans using each method to catch up with sports news stories)

	TV	Computer/ laptop computer	Mobile Device	Radio Station/ Sports Programme
AUS	72	40	22	20
BRA	79	63	36	24
CHN	78	60	55	26
FRA	77	48	22	20
GER	74	46	26	27
GBR	65	41	25	20
IND	79	53	46	22
IDN	91	63	44	27
ITA	70	41	26	15
JPN	88	58	18	12
RUS	86	71	28	27
RSA	81	47	40	42
SPA	76	48	31	31
TUR	86	61	40	18
UAE	71	53	45	19
USA	59	48	24	14

40%

OF FANS IN SOUTH AFRICA USE A MOBILE DEVICE TO CATCH UP WITH SPORTS NEWS STORIES

NEWS

2in3

FANS IN FRANCE SEEK SPORTS NEWS CONTENT ON INTERNATIONAL COMPETITIONS

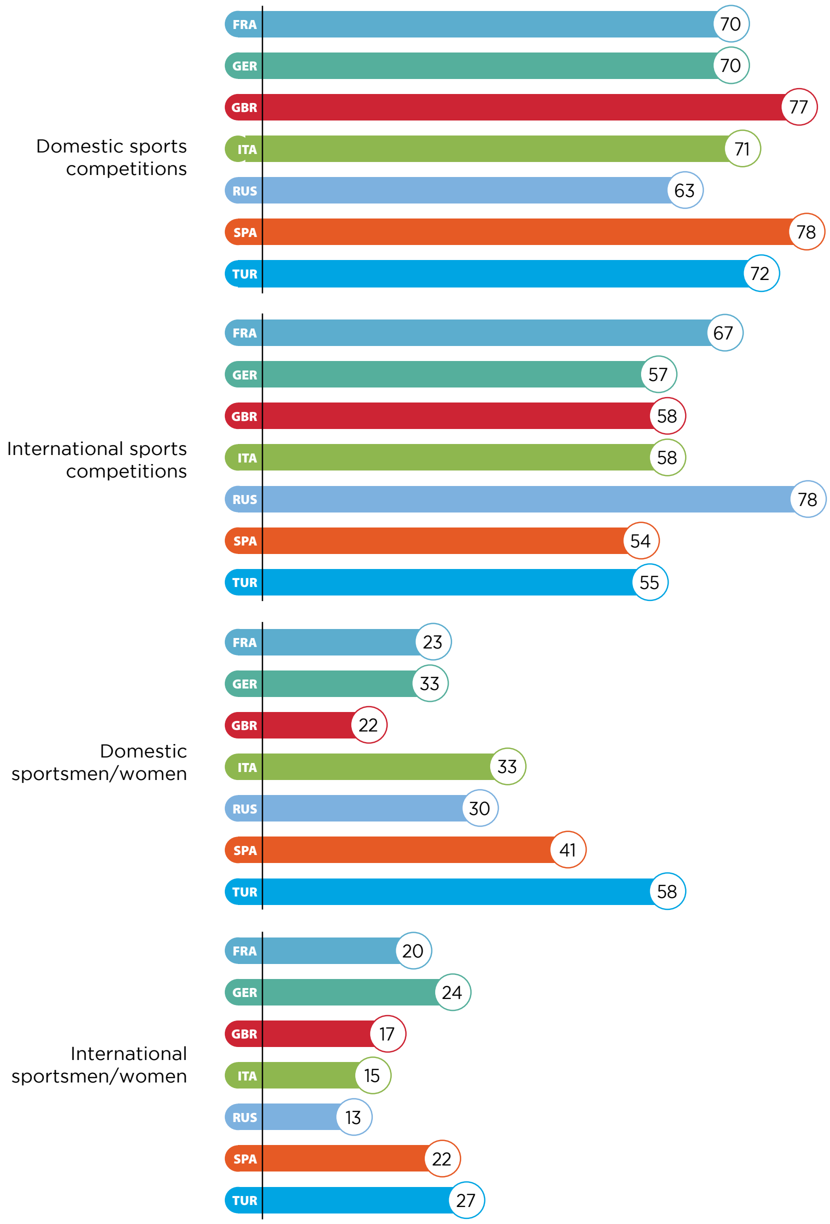
Sports news content sought by fans

In Europe, the most sought after news content is for domestic sports competitions. This is likely driven by the strength and success of domestic competitions, particularly football, in these markets. There is also a high level of interest amongst European fans in international competitions. This is particularly true for Russia, where there is greater interest for international competitions rather than domestic ones. Again, this is likely linked to the strength of domestic competitions available to fans. In addition, the recent Sochi Olympics is likely to have driven Russian fan interest in international competitions. Interest in sports stars tends to be more for domestic rather than international athletes. Turkish fans have a particularly keen interest in the fortunes of domestic athletes.

Outside of Europe, the news content sought by fans tends to be influenced by the landscape of the most popular sports followed, as well as the strength of domestic leagues. In the US for example, the big three American sports dominate fan attention, and so news on domestic sports competitions is most in demand, with just 23% seeking news on international competitions. Similarly, in Japan,

Figure 8: Sports news content sought by fans – European Markets

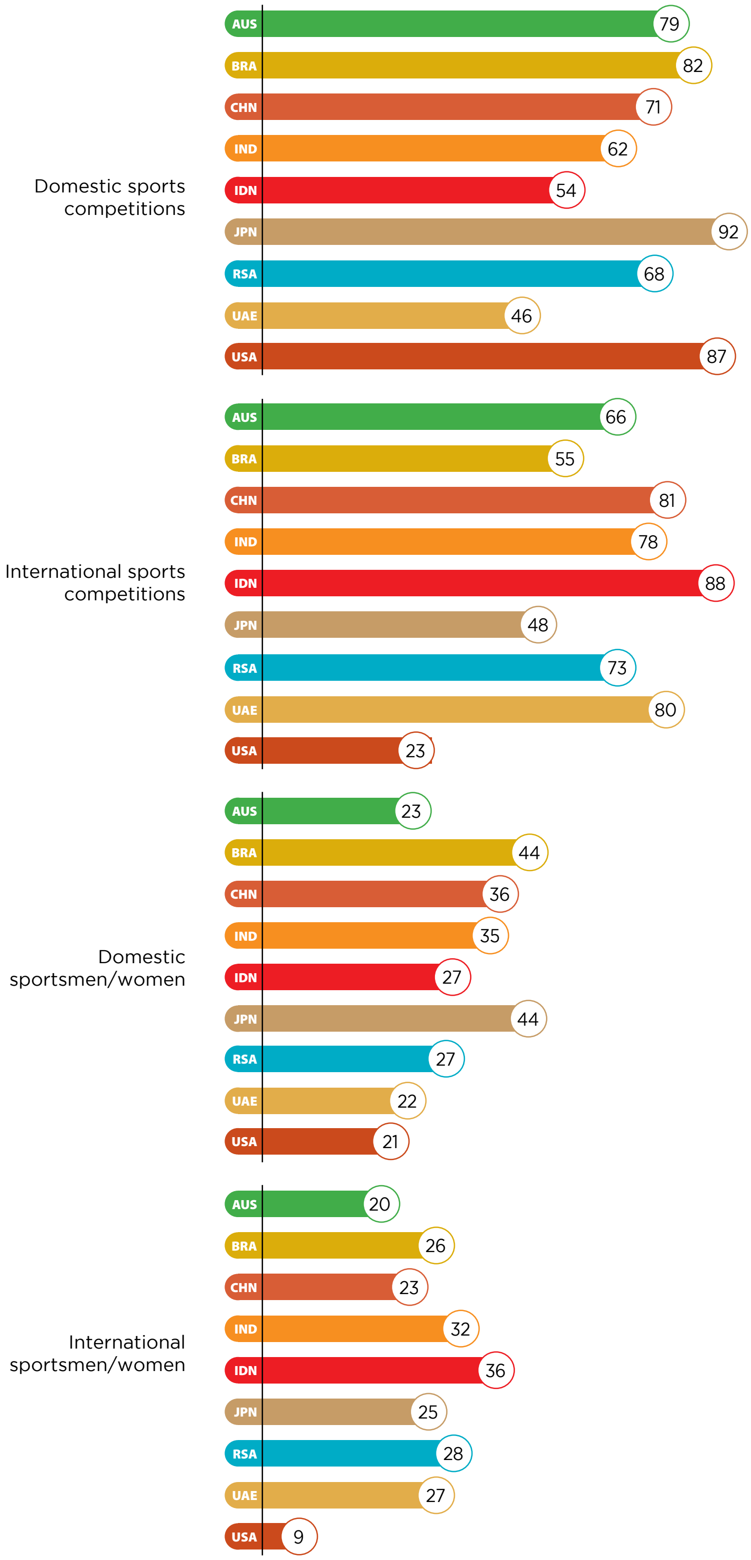
(% of sports fans that catch up with sports news stories who seek the following sports news)



news on domestic competitions is the most sought after content, likely driven by demand for news on the Nippon Professional Baseball league and the J1 League. In contrast, in the UAE, where football, cricket and tennis are the most popular sports followed, and where there are less established domestic competitions, news on international competitions is the most sought after content.

Figure 9: Sports news content sought by fans – Rest of the World Markets

(% of sports fans that catch up with sports news stories who seek the following sports news)



NEWS

44%

OF FANS IN BRAZIL SEEK SPORTS NEWS CONTENT ON DOMESTIC SPORTSMEN/WOMEN

CONSUMING SPORT ON TV

2.9

HOURS ARE SPENT BY AUSTRALIAN SPORTS FANS CONSUMING SPORT ON TV PER WEEK

Consuming Sport On TV

This section provides insight into how fans consume sport via TV.

As indicated in Figure 3, upwards of 90% of fans consume sport on TV, making it the most popular method used across all sixteen markets. In addition, as shown in Figure 7, television is also the primary means through which fans catch up with sports news stories. Almost all TV viewing takes place at home, and the adoption of high definition TV continues to be one of the biggest claimed changes in sports consumption by fans over the past two years.

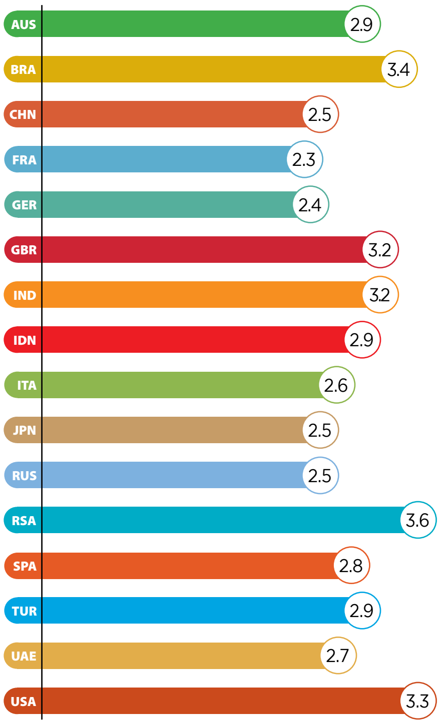
Time spent per week consuming sport on TV

TV is the single activity that fans spend the longest amount of time consuming sport on, where the time spent is typically between 2 – 4 hours in an average week across the sixteen markets surveyed. Fans in South Africa, Brazil and the US are spending the longest amount of time consuming sport on TV.

This year has seen decreases in time spent following sport on TV by fans in China, India and the US. In contrast, fans in Brazil and Russia are spending more time per week following sport on TV than they were 12 months ago.

Figure 10: Hours spent per week consuming sport on TV

(Average number of hours in a week sports fans spend consuming sport on TV)



Paying to watch sport on TV

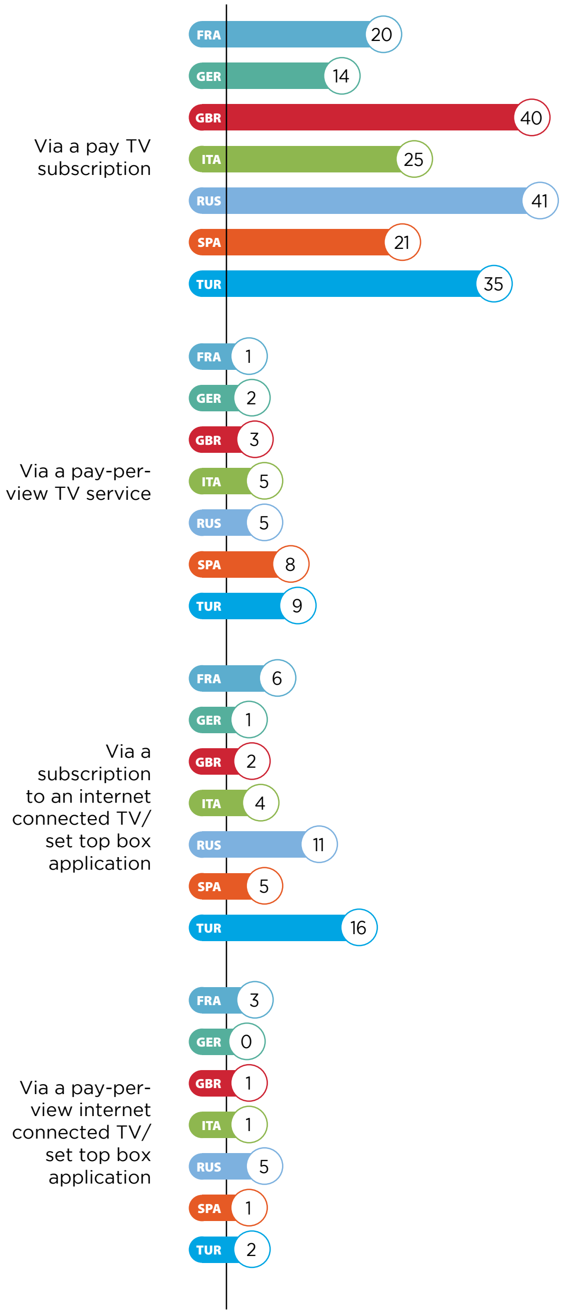
As per previous years, a greater proportion of fans in Europe have paid to watch sport via a pay TV subscription than via a pay-per-view TV service in the last 12 months. Of the additional payment methods included this year, Russian and Turkish fans are the most likely to have paid via an internet connected TV or set top box application. French fans also have a greater propensity than other European markets to pay to watch sport via this method, which is reflective of the higher penetration of connected TV in this market. In Germany, 79% of fans have not paid to watch sport in the last 12 months, the greatest number across all sixteen markets surveyed.

40%

OF FANS IN GREAT BRITAIN HAVE PAID TO WATCH SPORT VIA A TV SUBSCRIPTION IN THE LAST 12 MONTHS

Figure 11: How fans have paid to watch sport on TV in the last 12 months – European Markets

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



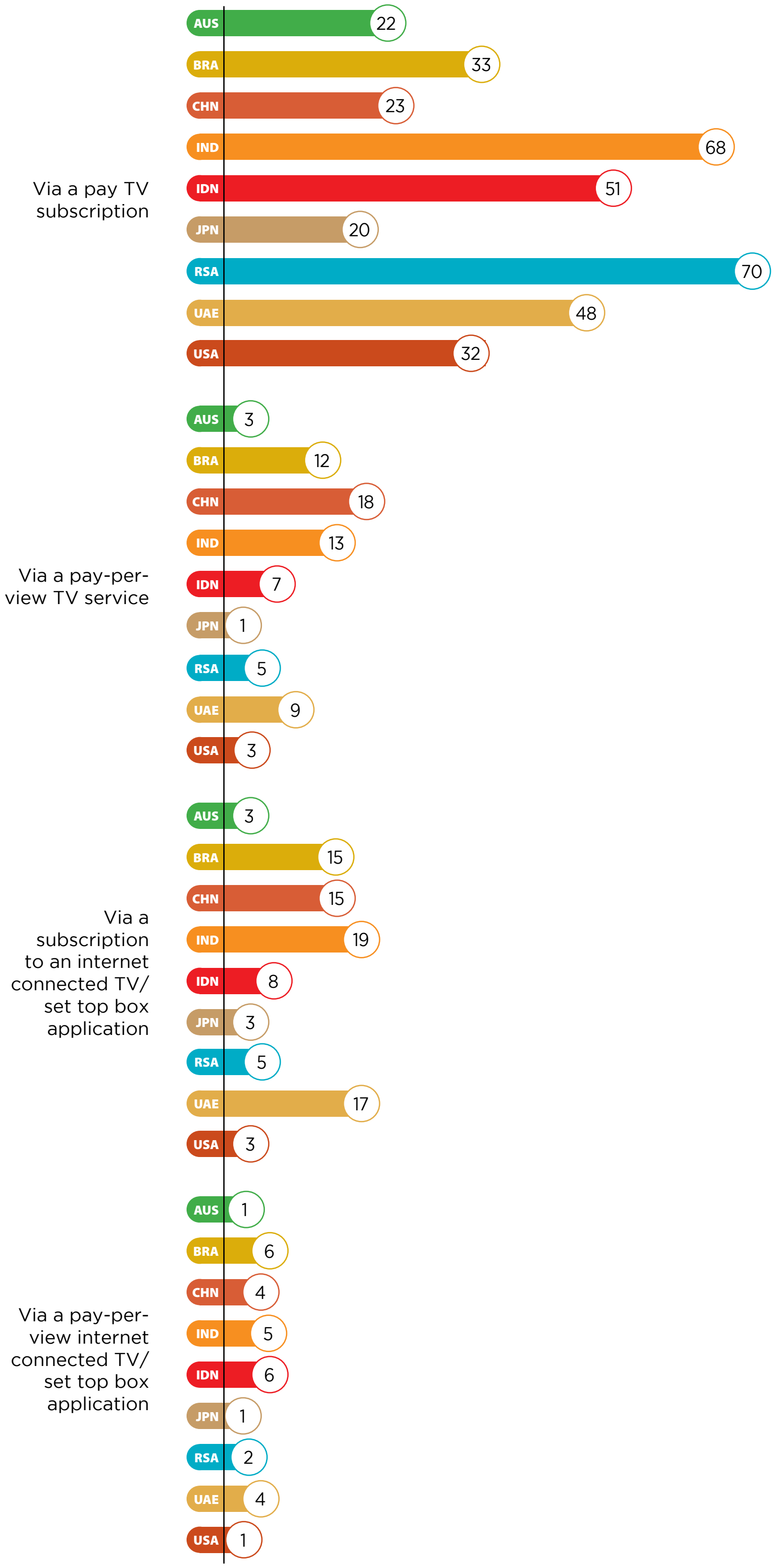
70%

OF FANS IN SOUTH AFRICA HAVE PAID TO WATCH SPORT VIA A TV SUBSCRIPTION IN THE LAST 12 MONTHS

India and South Africa are the two non-European markets with the greatest propensity for fans to pay to watch sport via a pay TV subscription. Approximately 1 in 2 fans in Indonesia and the UAE have also paid to watch sport via this method in the last 12 months. Of the additional methods included this year, subscriptions to a connected TV or set top box application are greatest in Brazil, China, India and the UAE.

Figure 12: How fans have paid to watch sport on TV in the last 12 months – Rest of the World Markets

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



CONSUMING SPORT ON CONNECTED TV

1 in 10

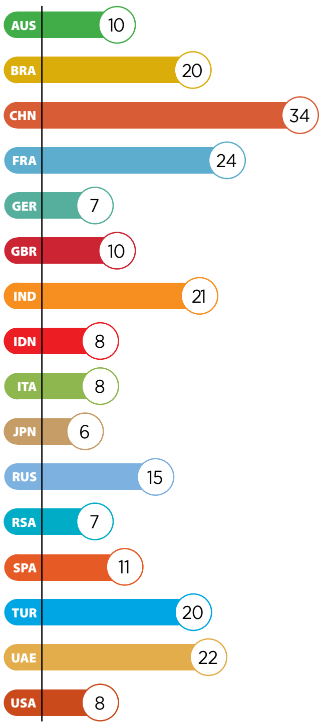
FANS IN GREAT BRITAIN NOW CONSUME SPORT VIA CONNECTED TV (COMPARED TO 2% IN 2011)

Consuming Sport On Connected TV

The trend for uptake of connected TV has remained broadly consistent year on year, with fans in Brazil, China, France, India, Turkey and the UAE more likely to consume sport via this method. Penetration in China and France has continued to be the greatest across the markets surveyed since 2011. Whilst take up of connected TV in Great Britain has increased from 2% of fans in 2011 to 10% in 2014, this market, along with the other Western European markets, has not yet reached the penetration seen in France. With 3 – 13% of fans across the sixteen markets believing that connected television will have the biggest impact on the way sport is consumed in the next two years, consumption of sport via this method is likely to remain relatively unchanged in the near future.

Figure 13: Consuming sport via connected TV

(% of sports fans consuming sport via an internet connected TV or set top box, or gaming consoles connected to the TV)

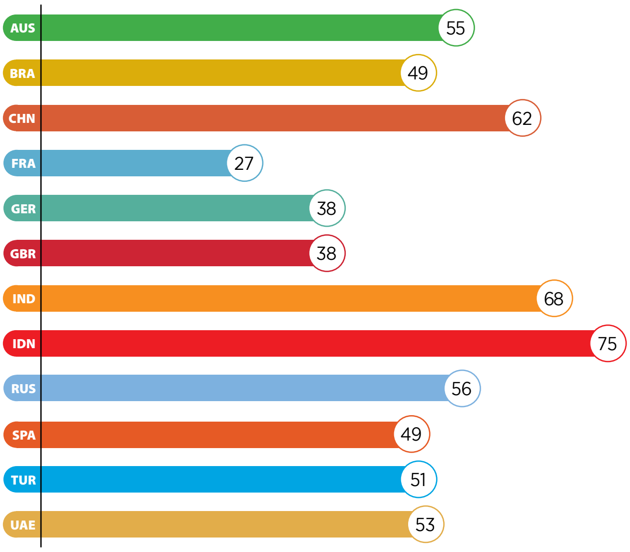


Opinion about consuming sport via connected TV

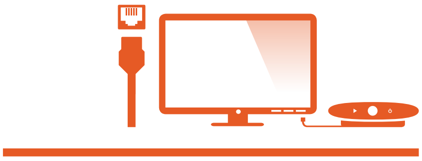
Perceptions about the sports content available to watch on connected TV varies per market. In China, where penetration is the greatest, approximately 6 out of 10 users believe that there is a wider range of sport available on connected TV platforms. In contrast, in France, where 1 in 4 fans claims to use this method of following sport, 27% believe that there is a wider range of sport available, representing the lowest agreement across the markets. This could suggest consumer demand for connected TVs is more driven by the television services available in each market, rather than the sports content available on these platforms.

Figure 14: Opinion about the range of sports content available via connected TV

(% of internet connected TV or set top box users who believe that there is a wider range of sport available to watch via these platforms when compared to their other service providers

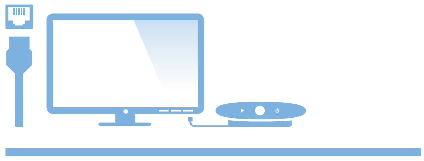


Please note: Italy, Japan and the US not included in the above chart due to sample size not being large enough



49%

OF FANS IN SPAIN WHO FOLLOW SPORT ON CONNECTED TVS BELIEVE THAT THERE IS A WIDER RANGE OF SPORTS AVAILABLE TO WATCH ON THOSE PLATFORMS



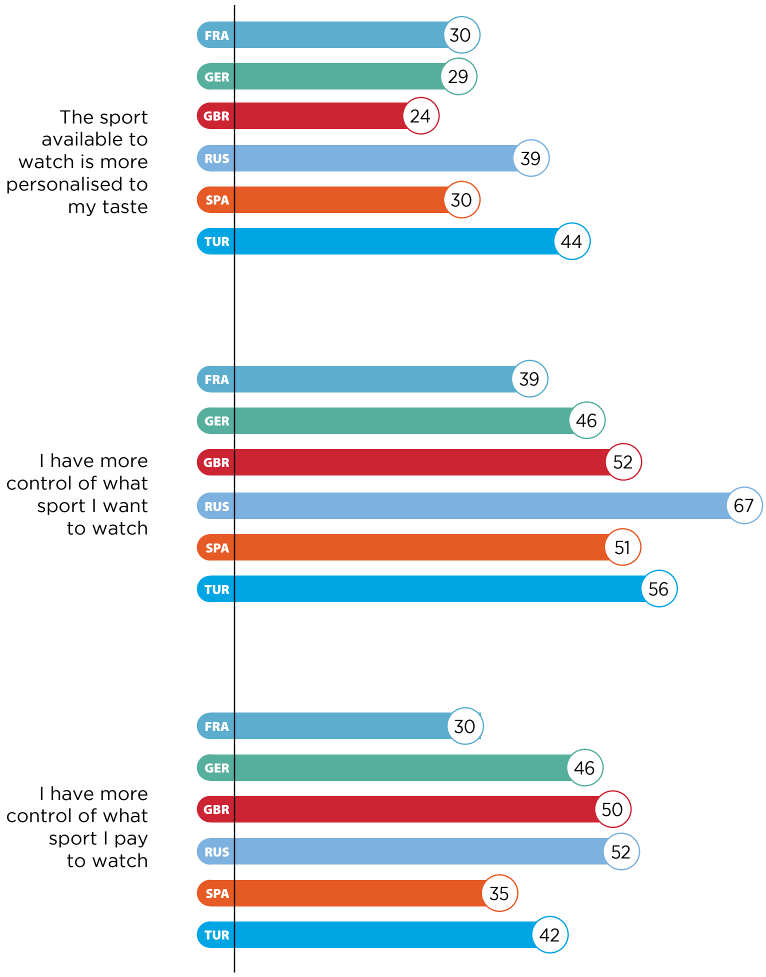
2in3

SPORTS FANS IN RUSSIA BELIEVE THEY HAVE MORE CONTROL OVER WHAT SPORT THEY WATCH VIA CONNECTED TV

Similar to Figure 14, fans that consume sport via connected TV in France generally have a lower opinion of the service available than other European fans who use this method. Two-thirds of fans that follow sport via this method in Russia believe that they have more control of what sport they want to watch.

Figure 15: Agreement with statements about sports content available on connected TV – European Markets

(% of internet connected TV or set top box users who agree (strongly or tend to agree) with each of the following statements)

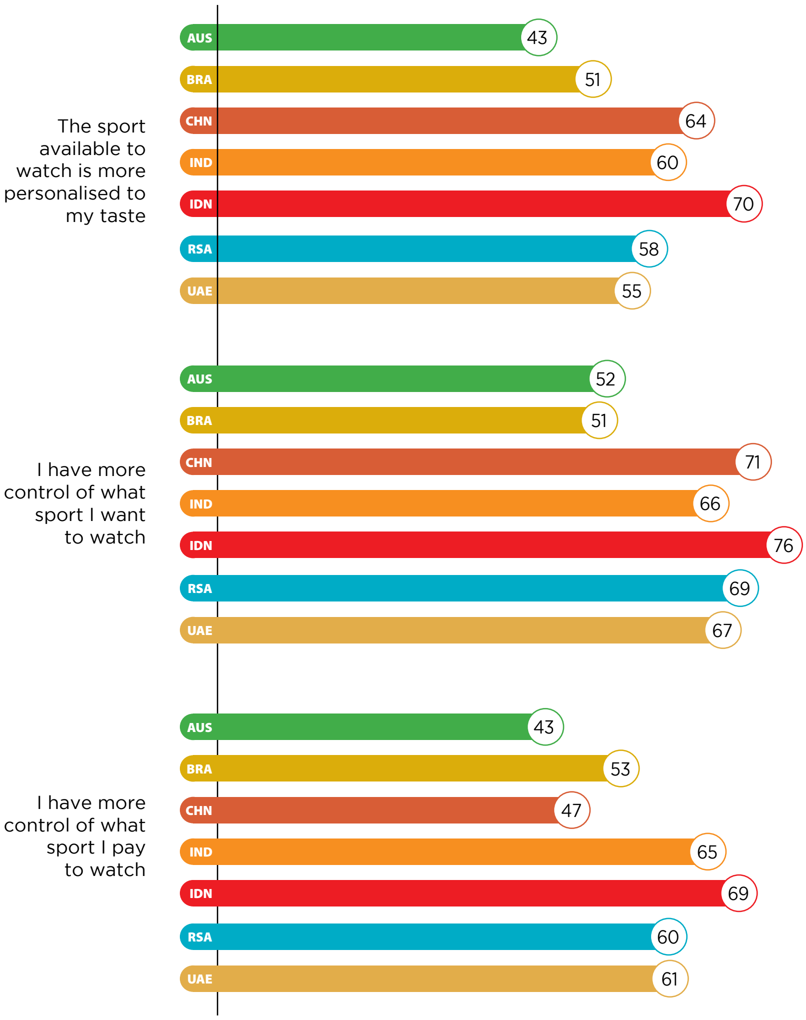


Please note: Italy, Japan and the US not included in the above chart due to sample size not being large enough

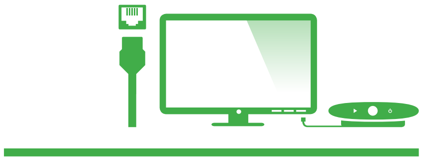
In China, the market with the greatest penetration of connected TV users, opinion about the sports content available on these platforms is in stark contrast to fan opinion in France. 7 out of 10 Chinese fans believe that they have more control of what sport they want to watch. Users in Indonesia and India also tend to have a better opinion about the sports content available.

Figure 16: Agreement with statements about sports content available on connected TV – Rest of the World Markets

(% of internet connected TV or set top box users who agree (strongly or tend to agree) with each of the following statements)



Please note: Italy, Japan and the US not included in the above chart due to sample size not being large enough



43%

OF FANS IN AUSTRALIA WHO FOLLOW SPORT ON CONNECTED TVs AGREE THE SPORT IS MORE PERSONALISED TO THEIR TASTE

USE OF A SECOND SCREEN DEVICE IS GREATEST IN ASIA, BRAZIL, RUSSIA & TURKEY

74%

OF SPORTS FANS IN TURKEY USE A SECOND SCREEN DEVICE WHILST WATCHING SPORTS

Using a second screen connected device whilst watching sport on TV

Whilst television is the main method through which fans follow sport, the availability and accessibility of connected devices means that sports fans may have access to a number of devices whilst consuming sport on TV.

Figure 17 and 18 illustrates the proportion of fans that have used an internet connected device at the same time as watching sport on TV. Use of a second screen device in the European markets surveyed is greatest in Turkey and Russia.

Brazil, China, India and the UAE have the greatest number of fans who are using a second screen device at the same time as watching sport on TV (this is partly driven by the respondents surveyed in these markets being internet connected).

Figure 17: Using a second screen connected device whilst watching sport on TV – European Markets

(% of sports fans that have used an internet connected device (computer, laptop computer, smartphone or tablet) at the same time as watching sport on TV)

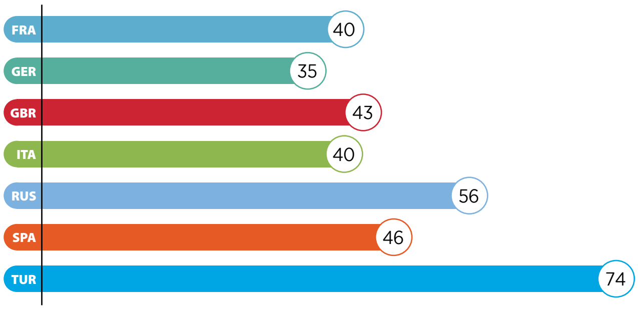
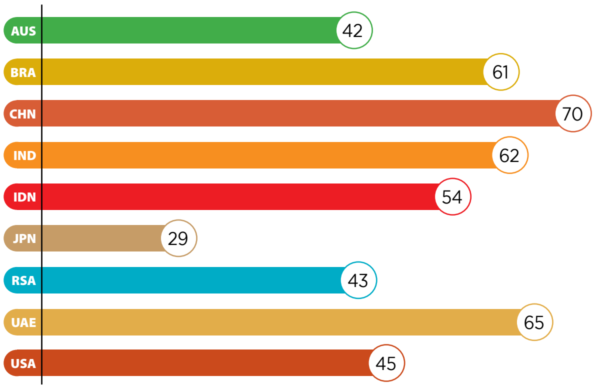


Figure 18: Using a second screen connected device whilst watching sport on TV – Rest of the World Markets

(% of sports fans that have used an internet connected device (computer, laptop computer, smartphone or tablet) at the same time as watching sport on TV)



Across all sixteen markets, the majority of content that is consumed on second screens is sports related. Second screen devices may also be used for non-sports related content, indicating that these devices can also be a distraction rather than an augmentation of the sports content being watched on TV.

Following live text commentary is the most popular sports related content that is accessed via a second screen device across all sixteen markets. This shows that these devices are being used by fans to keep up-to-date with scores from matches and events that are taking place simultaneously. This indicates how second screen devices can be used to enhance the experience for the sports fan, as they are able to keep constantly informed of what is happening elsewhere. In addition to following live text commentary, second screen devices are also most commonly used for watching short clips and other live matches. Therefore, the sports fan in 2014 has greater control over what and how they choose to watch sport. Social networking is also another way in which fans can use a second screen device.

45%

OF US SPORTS FANS USE A SECOND SCREEN DEVICE WHILST WATCHING SPORTS ON TV

37%

OF SPORTS FANS IN THE UAE USE A SECOND SCREEN TO WATCH ANOTHER LIVE MATCH

Figure 19: Top 3 types of sports content accessed on second screen devices

Top 3 types of sports content accessed on second screen devices at the same time as watching sport on TV

AUS	Live text commentary (52%)	Watch short clips (25%)	Talk to friends about sport on TV (22%)
BRA	Live text commentary (57%)	Watch short clips/ Watch another live match (38%)	
CHN	Live text commentary (56%)	Watch short clips (45%)	Watch another live match (31%)
FRA	Live text commentary (53%)	Watch short clips (24%)	Read reports (18%)
GER	Live text commentary (39%)	Talk to friends about sport on TV (15%)	Watch short clips (14%)
GBR	Live text commentary (56%)	Watch short clips/ Place a bet online (16%)	
IND	Live text commentary (61%)	Watch short clips (42%)	Watch another live match (31%)
IDN	Live text commentary (52%)	Watch short clips (41%)	Watch another live match (40%)
ITA	Live text commentary (46%)	Watch short clips (29%)	Post comments on social networking platforms (20%)
JPN	Live text commentary (41%)	Read reports (26%)	Follow a sportsperson/ team/ journalist via a social networking platform (23%)
RUS	Live text commentary (53%)	Watch short clips (34%)	Watch another live match (31%)
RSA	Live text commentary (54%)	Talk to friends about sport on TV (31%)	Post comments on social networking platforms (26%)
SPA	Live text commentary (59%)	Watch another live match (35%)	Watch short clips (31%)
TUR	Live text commentary (53%)	Watch short clips (35%)	Post comments on social networking platforms (27%)
UAE	Live text commentary (63%)	Watch short clips (43%)	Watch another live match (37%)
USA	Live text commentary (44%)	Talk to friends about sport on TV (21%)	Watch short clips (20%)

Live text commentary: Follow live text commentary of other matches/ events being played

Watch short clips: Watch short clips of key game / event moments / news of other matches/ events being played

Talk to friends about sport on TV: Talk to friends via the device about the sports event being played on TV (e.g. via text messages, instant messenger)

Read reports: Read reports about matches/ events played earlier in the day

Post comments on social networking platforms: Post comments online via a social networking platform about the match/event I am watching on TV

CONSUMING SPORT ONLINE

WWW

67%

OF FANS IN ITALY FOLLOW SPORT ONLINE

Consuming Sport Online

This section provides insight into how fans are consuming sport online.

Throughout this section, online is defined as all sports consumption online, which includes consumption via a computer/ laptop computer and via internet enabled mobile devices such as smartphones or tablets. This section also analyses the devices used by fans to access sports content online, where these are defined as online via a computer/ laptop computer, and online via a mobile device (which includes both smartphones and tablets).

As indicated in Figure 3, online (including internet enable mobile devices) is the second most popular method to consume sport in all sixteen markets surveyed (it is equal second with print media in Germany).

Devices used to follow sport online

As Figure 20 indicates, computers/ laptop computers are the primary devices through which fans access both written and video content online. Across all markets, upwards of 90% of online fans are using these devices to access content.

Internet enabled mobile devices (including smartphones and tablets) are also used in addition to, rather than instead of computers/ laptop computers to consume sport online. Fans that watch sports content online tend to have a greater propensity to use a mobile device to access content than fans reading sport online (except in China and Germany).

With regards to specific devices used, smartphones are more widely used than tablets, which may be linked to the availability and cost of smartphones over tablets across the sixteen markets. However, tablets are used more than smartphones for live streaming of sport in Brazil, China, Germany, Great Britain, Indonesia, Russia, Spain and the US. The preference for tablets for live streaming in these markets is likely driven by their larger screen size when compared to smartphones, which will improve a fan's experience of this content. In contrast, smartphones are used more so than tablets for watching short clips, which may be driven by the ease of access smartphones provide and the shorter time involved consuming this type of content.

Figure 20: Devices used to access sports content online

(How to read table: 59% of fans in Australia access sports content online via a computer/ laptop computer)

	Via a Computer/ Laptop Computer	Via a Smartphone	Via a Tablet	Via a Mobile Device (NET)
AUS	59	33	19	41
BRA	79	42	36	59
CHN	77	59	46	64
FRA	50	23	13	30
GER	49	25	13	29
GBR	56	29	20	39
IND	82	67	47	76
IDN	80	53	39	67
ITA	62	39	27	50
JPN	47	13	7	19
RUS	71	34	28	48
RSA	67	44	22	57
SPA	65	37	23	46
TUR	78	44	30	68
UAE	83	61	47	74
USA	65	34	22	42

Online: includes any form of interaction online (includes Mobile) from reading articles through to watching live events on a computer/ laptop computer / mobile
Mobile Device (NET): includes all who follow via a smartphone and/or tablet computer

59%

OF FANS IN AUSTRALIA ACCESS SPORTS CONTENT ONLINE VIA A COMPUTER/LAPTOP

42%

OF US FANS ACCESS SPORTS CONTENT ONLINE VIA A MOBILE DEVICE

90%

OF FANS IN BRAZIL ACCESS SPORTS CONTENT ONLINE VIA A COMPUTER/ LAPTOP AT LEAST ONCE A WEEK IN AN AVERAGE WEEK

88%

OF FANS IN GERMANY ACCESS SPORTS CONTENT ONLINE VIA A MOBILE DEVICE AT LEAST ONCE A WEEK

Frequency of consuming sports content online

The frequency of accessing sports content online via a computer/ laptop computer and via mobile devices is broadly similar within markets. However, across markets there is some variation in how frequently fans access sports content via these devices. In many markets, as many as 9 out of 10 fans access sport online via a computer or mobile device at least once a week. The propensity of fans to access content at least once a day also varies per market, with upwards of 1 in 2 mobile and computer/laptop computer users in Brazil, India and the UAE consuming sport at least once a day via these devices. The likeliness for fans to access content via a mobile device at least once a day has increased year on year in Brazil, India, Japan, Russia and Spain. However, fans in Australia, China, Germany, Great Britain, Indonesia, Italy and Turkey are less likely to access content on these devices at least once a day this year.

Figure 21: Frequency of accessing sports content online

(How to read: 35% of fans in Australia access sports content online via a computer/ laptop computer at least once a day in an average week)

	Online Via A Computer/ Laptop Computer		Online Via A Mobile Device	
	At Least Once A Day	At Least Once A Week	At Least Once A Day	At Least Once A Week
AUS	35	78	36	73
BRA	54	90	54	88
CHN	44	88	47	90
FRA	40	79	42	82
GER	29	89	34	88
GBR	44	79	41	76
IND	52	90	54	90
IDN	38	88	39	82
ITA	41	88	45	85
JPN	48	81	45	79
RUS	43	89	38	85
RSA	39	85	38	82
SPA	45	90	47	87
TUR	49	92	44	84
UAE	56	91	54	89
USA	38	75	36	75

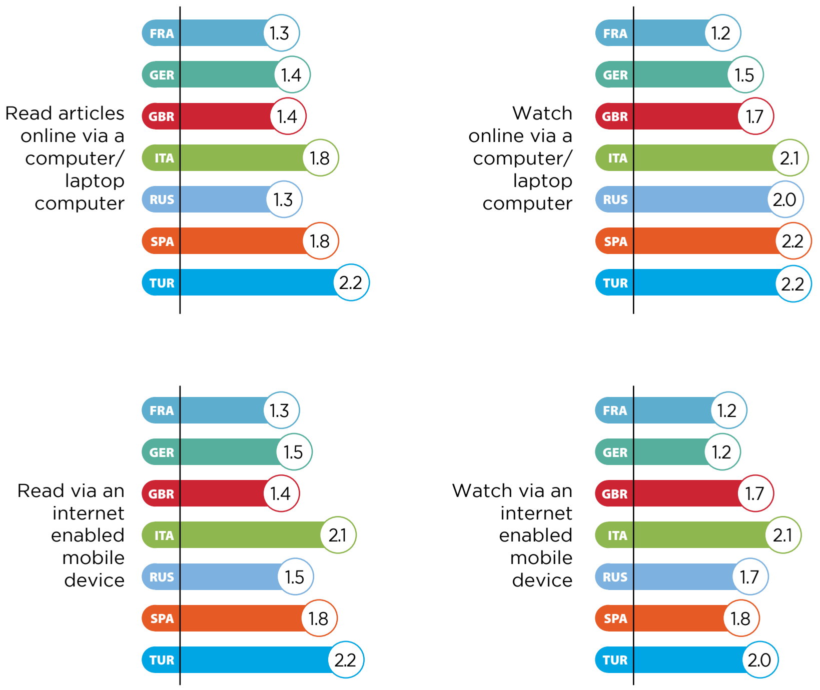
Time spent per week consuming sport online

Driven partly by the number of activities that are measured online, online consumption takes up approximately 50-60% of the total time spent by fans consuming sport in an average week. Across all markets, fans are more likely to watch and read sport online via a computer/ laptop computer, rather than via mobile devices.

In the European markets surveyed, fans typically spend between 1 – 2.5 hours per week either reading or watching content online via a computer/ laptop or mobile devices. Italian and Turkish fans spend the longest amount of time consuming sport online across each method. A greater amount of time is spent watching sport online via a computer/laptop than reading (except in France) where fans in Italy, Russia, Spain and Turkey spend over 2 hours per average week watching sport via these devices. In Italy and Turkey, fans spend upwards of 2 hours per week watching and reading sports content online via mobile devices.

Figure 22: Hours spent per week consuming sport online – European Markets

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



1.8

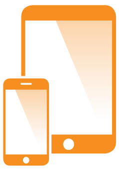
HOURS PER WEEK SPENT BY SPANISH FANS READING SPORTS CONTENT ONLINE VIA A COMPUTER/LAPTOP

2.0

HOURS PER WEEK SPENT BY TURKISH FANS WATCHING SPORTS CONTENT ONLINE VIA A MOBILE DEVICE

2.3

HOURS PER WEEK SPENT BY AUSTRALIAN FANS WATCHING SPORTS CONTENT ONLINE VIA A COMPUTER/LAPTOP



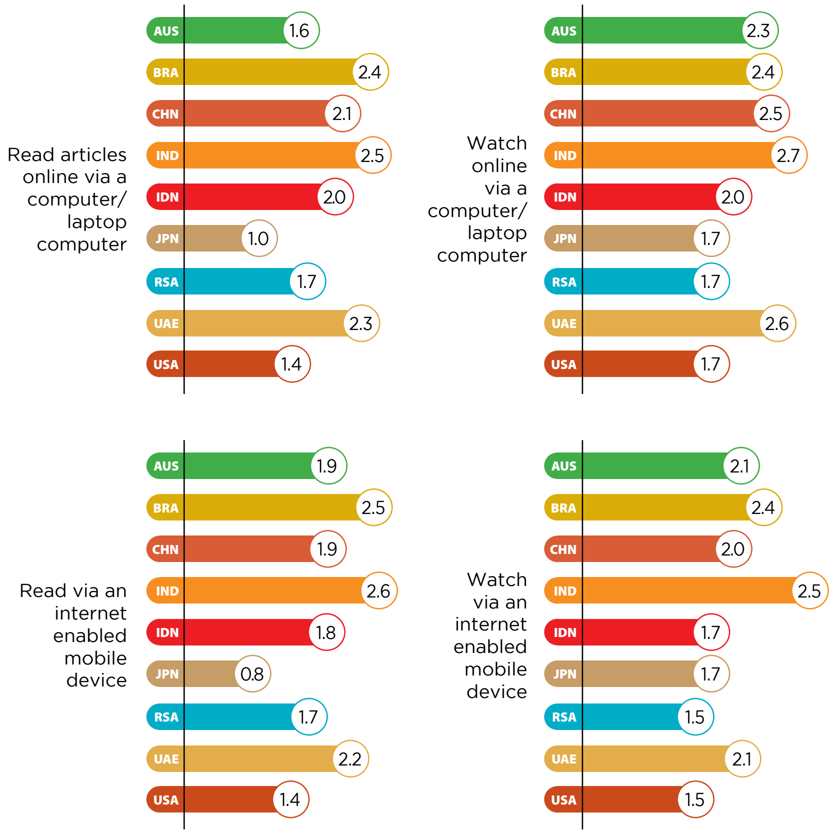
2.6

HOURS PER WEEK SPENT BY INDIAN FANS READING SPORTS CONTENT ONLINE VIA A MOBILE DEVICE

In the other markets surveyed, fans tend to spend at least an equal or longer amount of time watching sport on a computer/ laptop computer than reading content on these devices. Excluding Japan, fans spend approximately 1.5 – 2.5 hours per week either reading or watching sports content via mobile devices. As per 12 months ago, fans in Japan spend the least amount of time consuming sport across all online methods.

Figure 23: Hours spent per week consuming sport online – Rest of the World Markets

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



Paying to watch sport online

The proportion of fans that have paid to watch sport online, either via a subscription or a pay-per-view service, in the last 12 months in the European markets surveyed ranges from 6% of fans in Germany to 23% of fans in Turkey. As in previous years, fans have a greater propensity to pay to watch sport online via a subscription rather than a pay-per-view service. Fans in Italy, Russia and Turkey remain the most likely to have paid to watch sport online in the last 12 months. However, the proportion of fans in Turkey paying to watch sport via a subscription online has decreased from 30% in 2013 to 20% this year.

Outside of Europe, the proportion of fans paying to watch sport online (via any method) in the last 12 months ranges from 9% of fans in the USA to 43% of fans in China. Fans are also more likely to pay to watch sport online via a subscription rather than a pay-per-view service. In China, fewer fans have paid to watch sport online this year (58% paid online in 2013). However, take up of pay-per-view online viewing in China remains the greatest across all sixteen markets surveyed.

Figure 24: How fans have paid to watch sport online in the last 12 months – European Markets

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

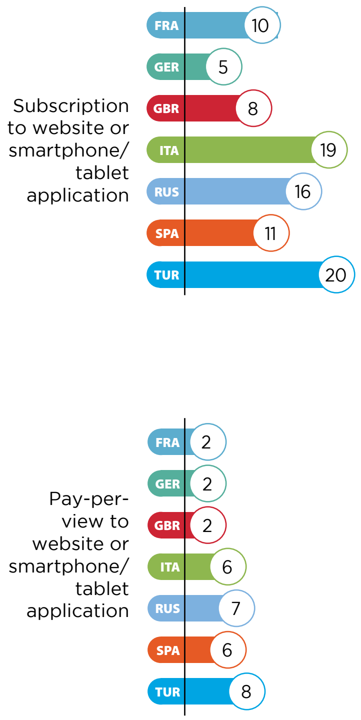
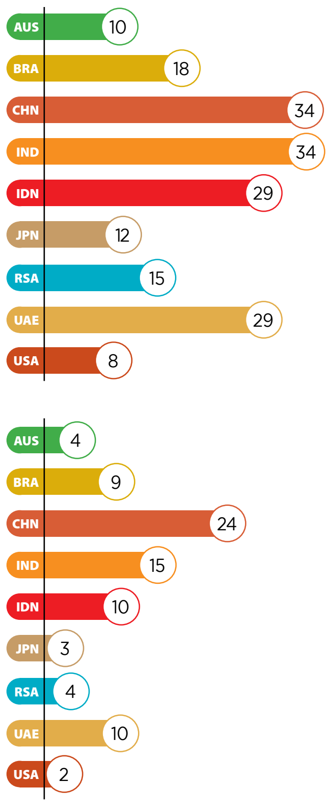


Figure 25: How fans have paid to watch sport online in the last 12 months – Rest of the World Markets

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



1 in 10

FANS IN FRANCE PAY TO WATCH SPORT ONLINE VIA A SUBSCRIPTION TO A WEBSITE OR SMARTPHONE APP

34%

OF SPORTS FANS IN CHINA PAY TO WATCH SPORT VIA A SUBSCRIPTION TO A WEBSITE OR MOBILE DEVICE APPLICATION

7%

OF FANS IN RUSSIA PAY TO WATCH SPORT ONLINE VIA PAY-PER-VIEW TO WEBSITE OR SMARTPHONE/ TABLET APP

45%

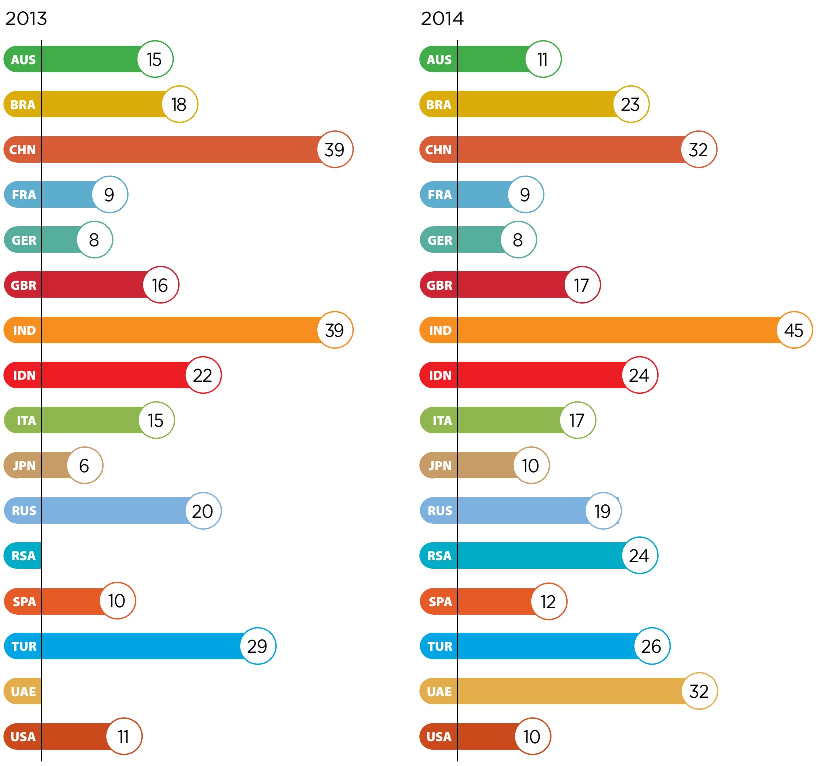
OF FANS IN INDIA ARE WILLING TO PAY FOR LIVE SPORTS CONTENT ONLINE COMPARED TO 39% 12 MONTHS AGO

The willingness of sports fans to pay for live sports content online varies per market. Chinese and Indian fans are the most willing, which is reflective of these markets being those where fans are currently most likely to pay to watch sport online (the adults surveyed in these markets are more likely to carry out transactions online generally). However, fans in China are less willing to pay for live sports content online this year, which is indicative of the smaller proportion that have paid to watch sport online in 2014. In India, as 38% of fans have paid to watch sport online in the last 12 months, there is a disparity between those who are willing and those who actually do pay.

Fans in Turkey are less likely to be willing to pay for live sports content online than they were 12 months ago. This has been reflected in the lower amount of fans that have paid to watch sport online this year, decreasing from 33% of fans in 2013 to 23% this year.

Figure 26: Willingness to pay for live sports content online

(% of sports fans stating that they are prepared to pay (top 2 box on a 5 point scale) for live sports content online)

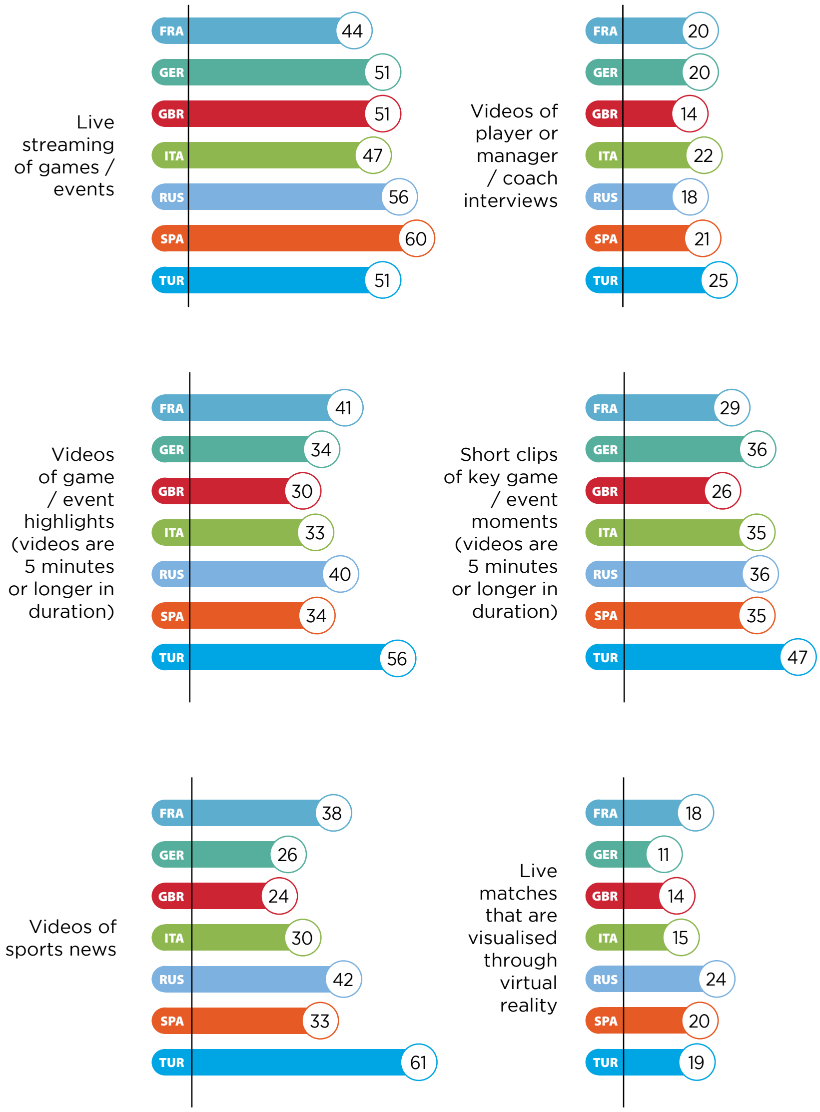


Watching sports content online

Live streaming of games and events tends to be the most viewed online content amongst fans in Europe. Highlights clips are also in demand, particularly in Turkey, where upwards of 1 in 2 online fans access longer highlights videos.

Figure 27: Sports content watched online – European Markets

(Type of content watched online by fans that access sports content online)



www

60%

OF ONLINE FANS IN SPAIN WATCH LIVE STREAMING OF GAMES/ EVENTS

26%

OF ONLINE FANS IN GREAT BRITAIN WATCH SHORT CLIPS OF KEY GAME/ EVENT MOMENTS www

67%

OF ONLINE FANS IN THE UAE WATCH LIVE STREAMING OF GAMES/ EVENTS

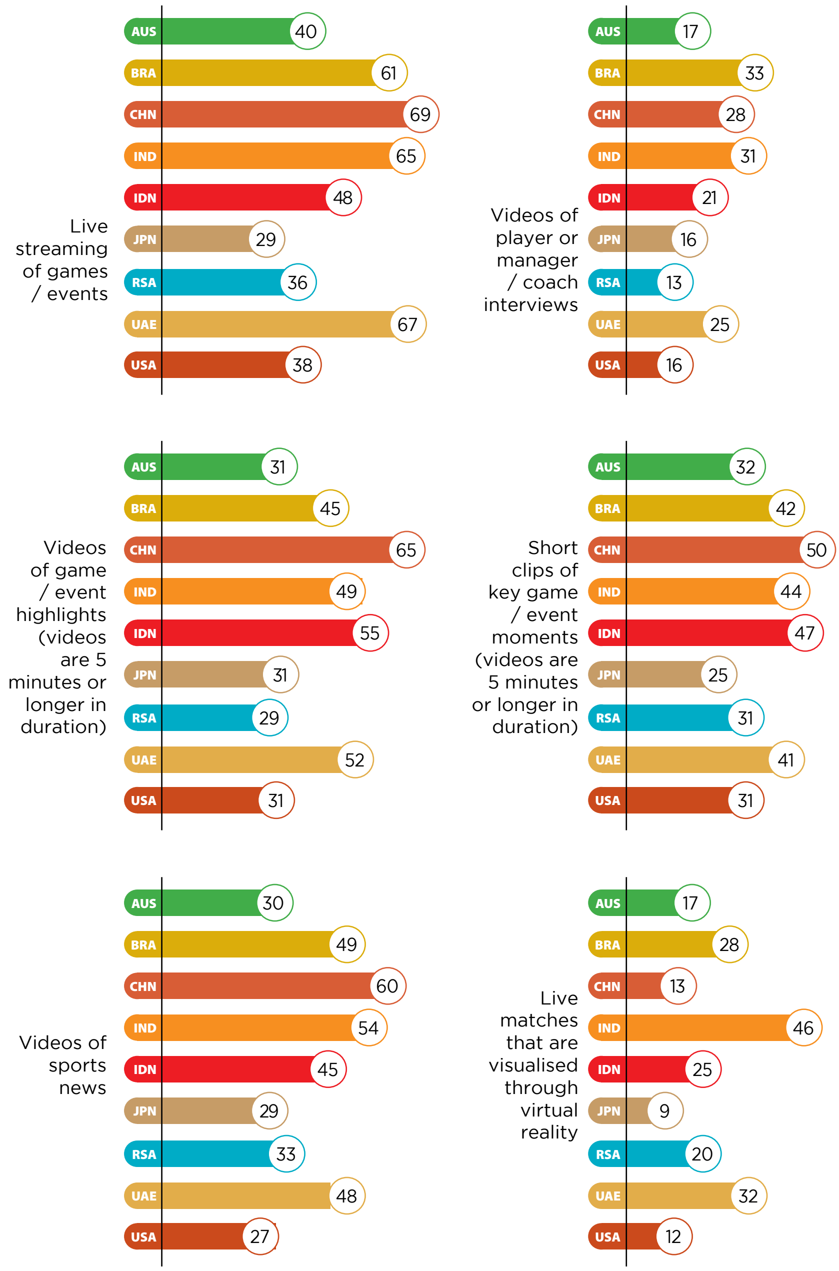
45%

OF ONLINE FANS IN BRAZIL WATCH VIDEOS OF GAME/ EVENT HIGHLIGHTS

In the other markets, the type of content that is viewed online varies per market. In China for example, live streaming is most popular, followed by longer highlights clips and sports news videos. In Indonesia, online fans are more likely to watch longer highlights videos than they are live streaming.

Figure 28: Sports content watched online – Rest of the World Markets

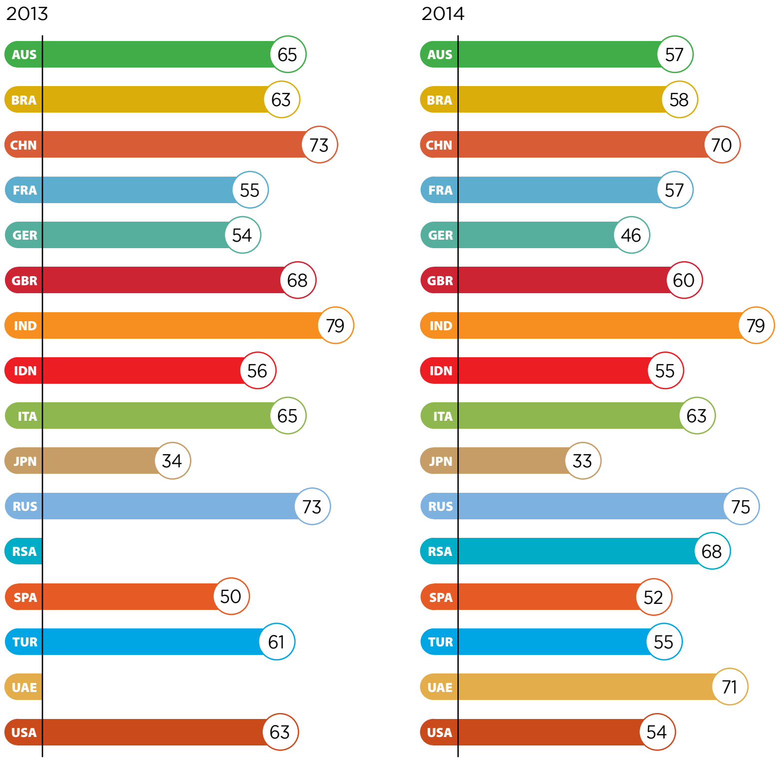
(Type of content watched online by fans that access sports content online)



In several markets this year, satisfaction with the viewing quality online has decreased. Amongst fans that watch sport online, satisfaction ranges from 1 in 3 in Japan to approximately 8 out of 10 fans in India. As per last year, although satisfaction is lower in Japan, just 1 in 10 have expressed dissatisfaction, as the majority are neither satisfied nor dissatisfied (58%). Dissatisfaction with the viewing quality online is greatest in Spain, where 15% of fans who watch sports content online state this.

Figure 29: Satisfaction with viewing quality online

(% of sports fans that watch sports content online who are satisfied (very or quite) with the viewing quality online)



57%

OF FANS IN FRANCE ARE VERY SATISFIED WITH THE VIEWING QUALITY ONLINE COMPARED TO 55% LAST YEAR

2 in 3

ONLINE FANS IN SPAIN READ SPORTS CONTENT ONLINE IN TEXT FORMAT

42%

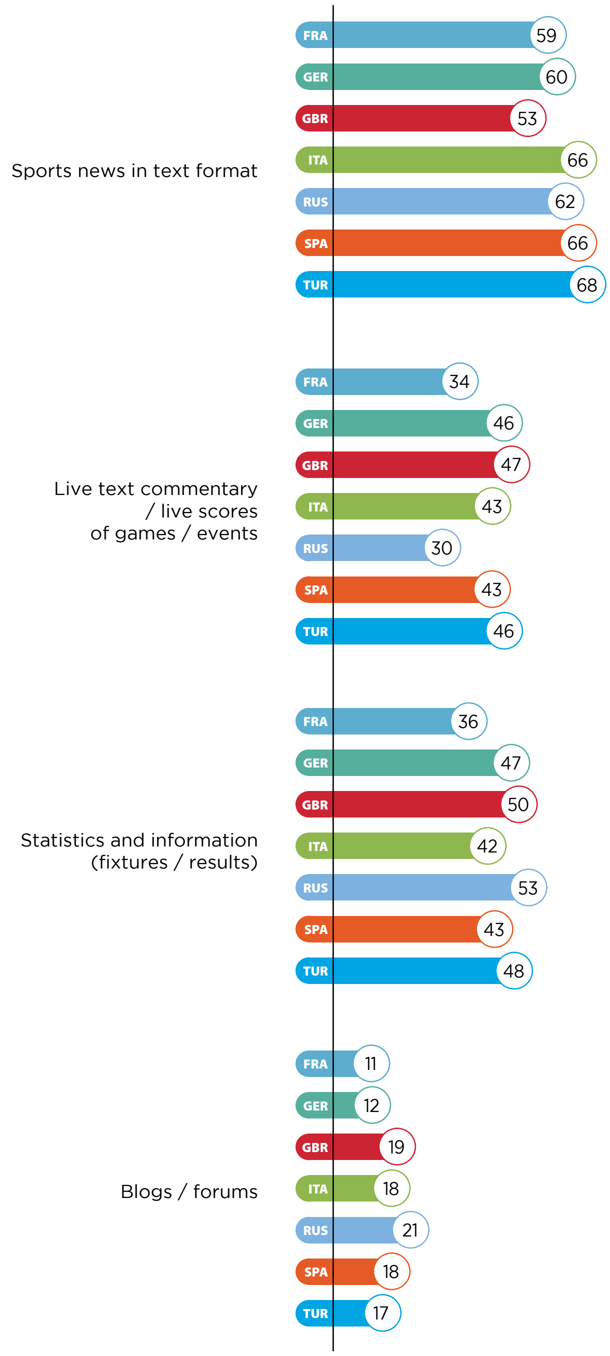
OF ONLINE FANS IN ITALY READ SPORTS STATISTICS AND INFORMATION ONLINE

Reading sports content online

Sports news in text format remains the most popular written content than online fans access. This is followed by demand for live text commentary or live scores and statistics and information.

Figure 30: Sports content read online – European Markets

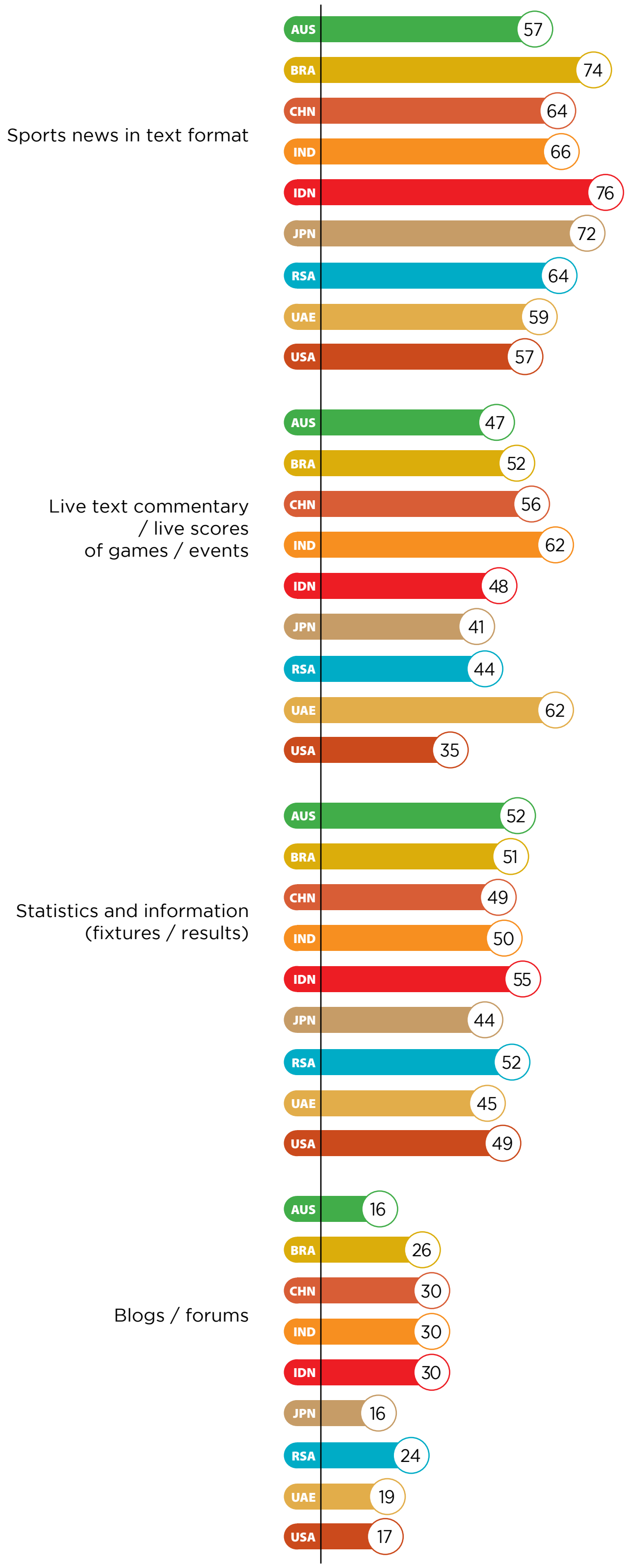
(Type of content read online by fans that access sports content online)



Sports news in text format is also the most popular written content accessed in the other markets surveyed. Live text commentary or live scores are popular amongst online fans in India and the UAE.

Figure 31: Sports content read online – Rest of the World Markets

(Type of content read online by fans that access sports content online)



64%

OF ONLINE FANS IN SOUTH AFRICA READ SPORTS CONTENT ONLINE IN TEXT FORMAT

48%

OF ONLINE FANS IN INDONESIA READ LIVE TEXT COMMENTARY OF LIVE SCORES OF GAMES/ EVENTS

67%

OF FANS IN INDONESIA CONSUME SPORTS ONLINE VIA NEWSPAPER WEBSITES/APPS

Websites/ applications (apps) used to follow sport online

The number of websites or apps used to follow sport online in an average week ranges from approximately 2 in Australia, France, Germany, Great Britain and the USA to between 4 and 5 in Turkey. The specific type of websites/apps used tends to be impacted by the media landscape within each market. For example, newspaper websites or apps tend to be the most popular in Western Europe (except Germany) whereas general sites/apps are most popular in Japan.

Similarly, the sites used by fans for live streaming will also be impacted by the media landscape within markets, as well as the type of sites that provide this content. As in previous years, a number of fans will stream live sport via unofficial sites, with French, German and Spanish fans the most likely to claim to do this.

Figure 32: Most popular websites/ apps used to consume sport online

Top 3 types of websites/ apps used to consume sport online (figures in brackets represent the proportion of online fans claiming to use each type of website/app)

AUS	Newspaper (47%)	General (36%)	Team/ League (28%)
BRA	General (40%)	Sports Broadcaster (38%)	Newspaper (34%)
CHN	General (53%)	Sports Broadcaster (46%)	Newspaper (44%)
FRA	Newspaper (31%)	Sports Broadcaster (25%)	Dedicated Sport (23%)
GER	Sports Broadcaster (29%)	Dedicated Sport/ General (26%)	
GBR	Newspaper/ Sports Broadcaster (40%)		Team/ League (25%)
IND	Newspaper (66%)	Sports Broadcaster (46%)	General (42%)
IDN	Newspaper (67%)	General (45%)	Sports Broadcaster (37%)
ITA	Newspaper (49%)	Team/ League (25%)	Dedicated Sport (22%)
JPN	General (64%)	Newspaper (51%)	Dedicated Sport (21%)
RUS	Dedicated Sport (45%)	Newspaper (40%)	Sports Broadcaster (37%)
RSA	Newspaper (67%)	Dedicated Sport (49%)	Sports Broadcaster (31%)
SPA	Newspaper (38%)	Dedicated Sport (35%)	Sports Broadcaster (33%)
TUR	Team/ League (52%)	Newspaper (51%)	Dedicated Sport (34%)
UAE	Newspaper (54%)	Dedicated Sport (37%)	General (35%)
USA	General (42%)	Sports Broadcaster (37%)	Team/ League (32%)

General: refers to websites/apps such as MSN, AOL, Yahoo

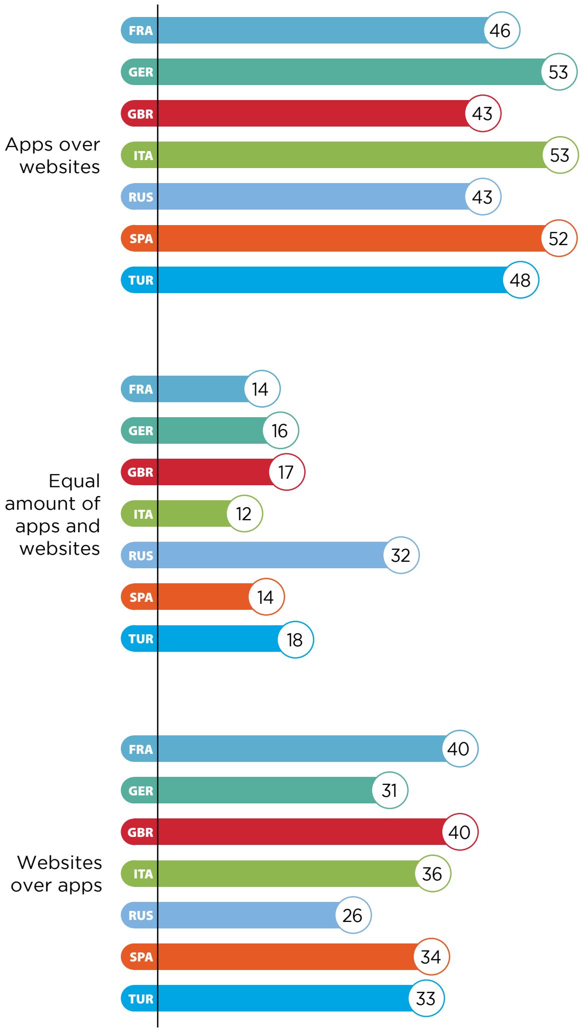
Dedicated sport: refers to websites/apps dedicated to sport but not linked to a newspaper or broadcaster. Examples being, goal.com, Kicker

Use of applications (apps) and websites

For fans that use internet enabled mobile devices to follow sport there is generally a choice over whether to use traditional websites or applications (apps). As Figure 33 indicates, there is not an overwhelming preference for apps over websites amongst fans that consume sport via a mobile device in Europe. In Germany, Italy and Spain approximately 1 in 2 mobile fans will use apps over websites, although a third will actually use more websites than apps.

Figure 33: Use of websites and applications (apps) to follow sport on mobile devices – European Markets

(% of fans that follow sport on mobile devices that use the following mix of websites/apps)

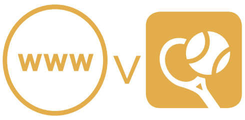


34%

OF FANS IN SPAIN PREFER WEBSITES OVER APPS TO FOLLOW SPORT

53%

OF FANS IN GERMANY PREFER APPS OVER WEBSITES TO FOLLOW SPORT



1in2

FANS IN THE UAE PREFER APPS OVER WEBSITES TO FOLLOW SPORT

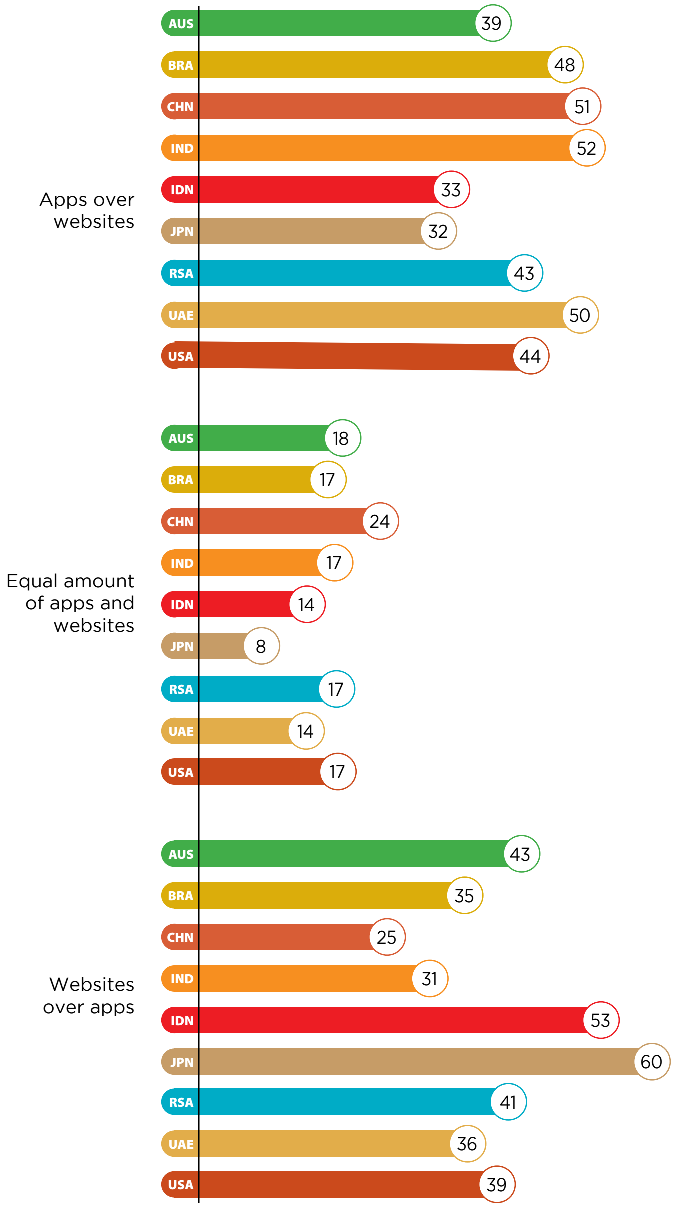
24%

OF FANS IN CHINA USE AN EQUAL AMOUNT OF APPS AND WEBSITES

As with the European markets, there is not a huge preference for apps over websites in the other markets surveyed. Approximately 1 in 2 will use apps over websites in Brazil, China, India and the UAE whilst there is greater use of websites over apps to consume sport on mobile devices in Indonesia and Japan.

Figure 34: Use of websites and applications (apps) to follow sport on mobile devices – Rest of the World Markets

(% of fans that follow sport on mobile devices that use the following mix of websites/apps)



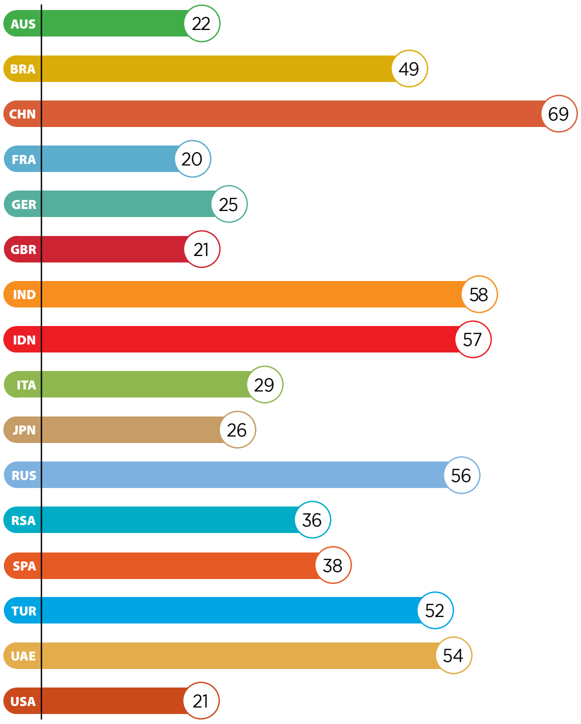
Use of internet enabled mobile devices at live professional events

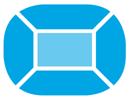
Use of a mobile device amongst fans that attend live professional games/ matches/ events ranges from 1 in 5 in Australia, France, Great Britain and the USA to approximately 7 out of 10 in China. The main reasons for not choosing to use a mobile device when attending live professional events is because fans do not want or need to use these devices. In China, India and Indonesia, another popular reason for not using these devices at live events is that there isn't considered a good enough internet connection available.

Fans use their mobile devices at live events for between 2 – 4 different activities across the sixteen markets surveyed. The most popular activities are texting and calling friends, which is perhaps not surprising. Following live scores, using social networking platforms (e.g. sharing pictures of the event) and watching and reading sports news are the popular sports related content that are accessed on these devices.

Figure 35: Use of mobile devices when attending live professional games/ matches/ events

(% of fans that use an internet enabled mobile device when attending live professional games/ matches/ events)





52%

OF SPORTS FANS IN TURKEY USE MOBILE DEVICES AT EVENTS

57%

OF SPORTS FANS IN INDONESIA USE MOBILE DEVICES AT EVENTS

CONSUMING SPORT VIA SOCIAL NETWORKING PLATFORMS

2.6

HOURS ARE SPENT PER WEEK BY INDIAN FANS CONSUMING SPORT VIA SOCIAL NETWORKING PLATFORMS

Consuming Sport Via Social Networking Platforms

This section provides insight into how fans are consuming sport via social networking platforms.

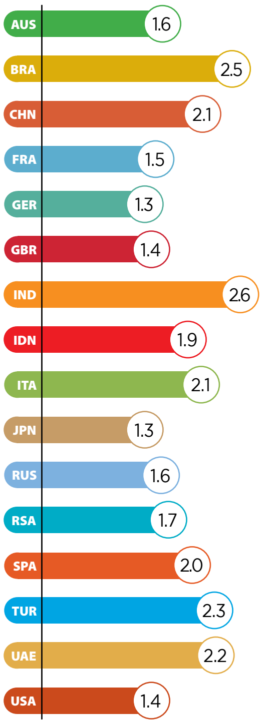
As indicated in Figure 3, consumption of sport via social networking platforms has increased in all markets that were previously surveyed (except Turkey which has decreased from 66% in 2013 to 62% in 2014). Use of social networking platforms to consume sport ranges from 12% in Japan to 65% in the UAE.

Time spent per week consuming sport via social networking platforms

As per 2013, the amount of time spent by fans following sport on social networking platforms is between 1 – 2.5 hours per average week. Fans in Brazil and India are the most engaged with these platforms whilst German and Japanese fans are the least engaged (which are two markets where fans are least likely to follow sport on these platforms).

Figure 36: Hours spent per week consuming sport via social networking platforms

(Average number of hours in a week sports fans spend consuming sport via social networking platforms)



Social networking platforms used to access sports content

Social networking fans typically use between 2 – 3 different platforms to follow sport. As in previous years, Facebook and YouTube tend to dominate fan attention; however, with the increasing number of platforms available, the proportion of fans using these two popular sites has decreased in some markets this year.

Figure 37: Social networking platforms used to follow sport

Top 5 social networking platforms used to follow sport (figure in brackets represents proportion of fans using social networking platforms to follow sport that use each platform)

AUS	Facebook (78%)	YouTube (48%)	Twitter /Google+ (17%)		Instagram (8%)
BRA	Facebook (82%)	YouTube (67%)	Google+ (35%)	Twitter (22%)	Instagram (16%)
CHN			RenRen (62%)		
FRA	Facebook (79%)	YouTube (52%)	Google+/ Twitter (17%)		Instagram (8%)
GER	Facebook (74%)	YouTube (54%)	Google+ (15%)	Twitter (9%)	Instagram (5%)
GBR	Facebook (66%)	Twitter (41%)	YouTube (39%)	Google+ (11%)	Instagram (7%)
IND	Facebook (83%)	YouTube (73%)	Google+ (46%)	Twitter (34%)	Orkut (16%)
IDN	YouTube (81%)	Facebook (68%)	Twitter/ Google+ (39%)		Kompasiana/ Kaskus (21%)
ITA	Facebook (68%)	YouTube (56%)	Google+ (22%)	Twitter (20%)	Instagram (10%)
JPN	YouTube (79%)	Twitter (58%)	Facebook (53%)	Google+ (11%)	Mixi (8%)
RUS	YouTube (71%)	Facebook (53%)	Google+ (40%)	Twitter (34%)	Instagram (17%)
RSA	Facebook (78%)	YouTube (56%)	Twitter (39%)	Google+ (32%)	Instagram (8%)
SPA	Facebook (70%)	YouTube (57%)	Twitter (38%)	Google+ (20%)	Instagram (13%)
TUR	Facebook (77%)	YouTube (66%)	Google+ (49%)	Twitter (44%)	Instagram (11%)
UAE	Facebook (82%)	YouTube (81%)	Google+ (38%)	Twitter (26%)	Instagram (11%)
USA	Facebook (70%)	YouTube (40%)	Twitter (24%)	Google+ (16%)	Instagram (10%)

41%

OF SOCIAL FANS IN GREAT BRITAIN USE TWITTER TO FOLLOW SPORT

78%

OF SOCIAL FANS IN SOUTH AFRICA USE FACEBOOK TO FOLLOW SPORT

HIGHLIGHTS

58%

OF SOCIAL FANS IN INDONESIA WATCH VIDEOS OF GAME HIGHLIGHTS VIA SOCIAL NETWORKS

53%

OF SOCIAL FANS IN JAPAN FOLLOW A SPORTS STAR VIA SOCIAL NETWORKS

Sports content accessed on social networking platforms

Content accessed on social networking platforms varies in each of the sixteen markets. Following a team or league via these platforms is popular in Western Europe, Australia, South Africa and the USA. Demand for this type of content amongst social networking fans is likely driven by the strength of domestic competitions in these markets. Video content is also accessed on these platforms with highlights, live streaming and sports news or interviews popular in several markets.

Figure 38: Sports content accessed on social networking platforms

Top 3 types of content accessed on social networking platforms (figure in brackets represents proportion of fans using social networking platforms to follow sport that access the following content)

AUS	Follow team/ league (51%)	Sports news in text format (38%)	Follow sports star (37%)
BRA	Videos of sports news/ interviews (56%)	Follow team/ league (51%)	Sports news in text format (50%)
CHN	Live streaming of games/ events (63%)	Follow sports star (54%)	Videos of game/event highlights (52%)
FRA	Videos of game/event highlights (46%)	Follow team/ league (45%)	Follow sports star (42%)
GER	Follow team/ league (49%)	Follow sports star/ Sports news in text format (44%)	
GBR	Follow team/ league (53%)	Follow sports star (39%)	Follow sports website (38%)
IND	Live streaming of games/ events (56%)	Follow sports star (53%)	Videos of game/event highlights (49%)
IDN	Videos of game/event highlights (58%)	Sports news in text format (55%)	Follow team/ league (49%)
ITA	Follow team/ league (54%)	Videos of sports news/ interviews (44%)	Videos of game/event highlights (43%)
JPN	Follow sports star (53%)	Videos of game/event highlights (48%)	Sports news in text format (42%)
RUS	Sports news in text format (57%)	Videos of sports news/ interviews (54%)	Live streaming of games/ events (51%)
RSA	Follow team/ league (59%)	Sports news in text format (54%)	Follow sports star (45%)
SPA	Follow team/ league (52%)	Sports news in text format (51%)	Follow sports star (48%)
TUR	Videos of sports news/ interviews (52%)	Follow team/ league (48%)	Videos of game/event highlights (47%)
UAE	Live streaming of games/ events (54%)	Follow team/ league (53%)	Videos of game/event highlights (49%)
USA	Follow team/ league (53%)	Live streaming of games/ events (36%)	Sports news in text format (35%)

(% of fans using social networking platforms to follow sport that access the following content)

Sports content shared on social networking platforms

In terms of sharing content on social networking platforms then content from a team or league's page or a sports star's page is popular in many of the sixteen markets. Sports pictures, news and video content are also widely shared on these platforms.

Figure 39: Content shared on social networking platforms

Top 3 types of content accessed on social networking platforms (figure in brackets represents proportion of fans using social networking platforms to follow sport that access the following content)

AUS	Content from team/ league's page/ Pictures (27%)		Short clips of key game/ event moments (23%)
BRA	Content from sports star's page (46%)	Pictures (29%)	Content from team/ league's page (28%)
CHN	Videos of game/event highlights (45%)	Videos of sports news/ interviews (36%)	Sports news in text format (34%)
FRA	Content from team/ league's page (33%)	Videos of game/event highlights (32%)	Content from sports star's page (29%)
GER	Content from sports star's page (25%)	Content from team/ league's page (24%)	Sports news in text format (21%)
GBR	Content from team/ league's page (30%)	Content from sports star's page (24%)	Pictures (20%)
IND	Content from team/league's/ sports star's page (40%)		Content from a sports journalist/ commentator's/ sports website's page (29%)
IDN	Sports news in text format (43%)	Content from team/ league's page (36%)	Videos of game/event highlights (35%)
ITA	Content from team/ league's page (30%)	Content from sports star's page (23%)	Videos of game/event highlights (22%)
JPN	Videos of game/event highlights (35%)	Content from sports star's page (32%)	Short clips of key game/ event moments (31%)
RUS	Sports news in text format (28%)	Videos of game/event highlights/ Pictures (25%)	
RSA	Pictures (37%)	Sports news in text format (33%)	Content from sports star's page (31%)
SPA	Content from sports star's page (33%)	Content from team/ league's page (29%)	Videos of game/event highlights (22%)
TUR	Content from team/ league/ sports star's page (33%)		Sports news in text format (28%)
UAE	Content from team/ league/ sports star's page (36%)		Videos of game/event highlights (32%)
USA	Pictures (25%)	Content from team/ league's page (24%)	Short clips of key game/ event moments (19%)

(% of fans using social networking platforms to follow sport that share the following content)

46%

OF SOCIAL FANS IN BRAZIL SHARED CONTENT FROM A SPORTS STARS PAGE ON SOCIAL NETWORKS

1in5

OF SOCIAL FANS IN GREAT BRITAIN SHARE PICTURES ON SOCIAL NETWORKS

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