

USA



KNOWTHEFAN

The Global Sports Media Consumption Report 2014

US Overview



Published May 2014

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Published by SportBusiness Group

SportBusiness is a trading name of SBG Companies Ltd, a wholly-owned subsidiary of Electric Word plc

Registered office: St Mark's House, Shepherdess Walk, London, N1 7BQ

Registered number: 3934419

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About the project partners



Sporting News Media is a PERFORM Group company and a market leader in the creation, distribution and monetization of premium sports media content for digital audiences in the US, reaching an audience in excess of 30 million sports fans each month.

Sporting News Media is ranked number one in digital sports video viewership in the US (comScore Video Metrix, April 2014) and seventh overall in digital sports media in the US (comScore Media Metrix, Multi-Platform, April 2014).



Kantar Media Sports 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 Sports provides market leading monitoring, evaluation and market research services that help clients make more informed decisions about how sports and entertainment can impact on consumer behavior 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 sports 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 sports 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 sports, 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 sports – 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 Sports 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 – sports 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 favorite sports, 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 games 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 bar 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 sports.

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 sports 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 soccer 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 behavior; 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 sports, behind TV and ahead of print. Given that newspapers have been covering sports 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 sports as one of the key verticals which can underpin that migration and provide sufficient premium and exclusive content. Sports 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 sports 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 sports on social networking sites has reached remarkable levels when compared with the time spent watching sports on TV. As with the print/online comparison, the point has to be underlined that we are comparing a way of consuming sports 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 sports this way. These include India (2.6 hours), Brazil (2.5), Turkey (2.3), the UAE (2.2), Italy 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 soccer 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 soccer 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 sports' 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 soccer 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 soccer 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.”

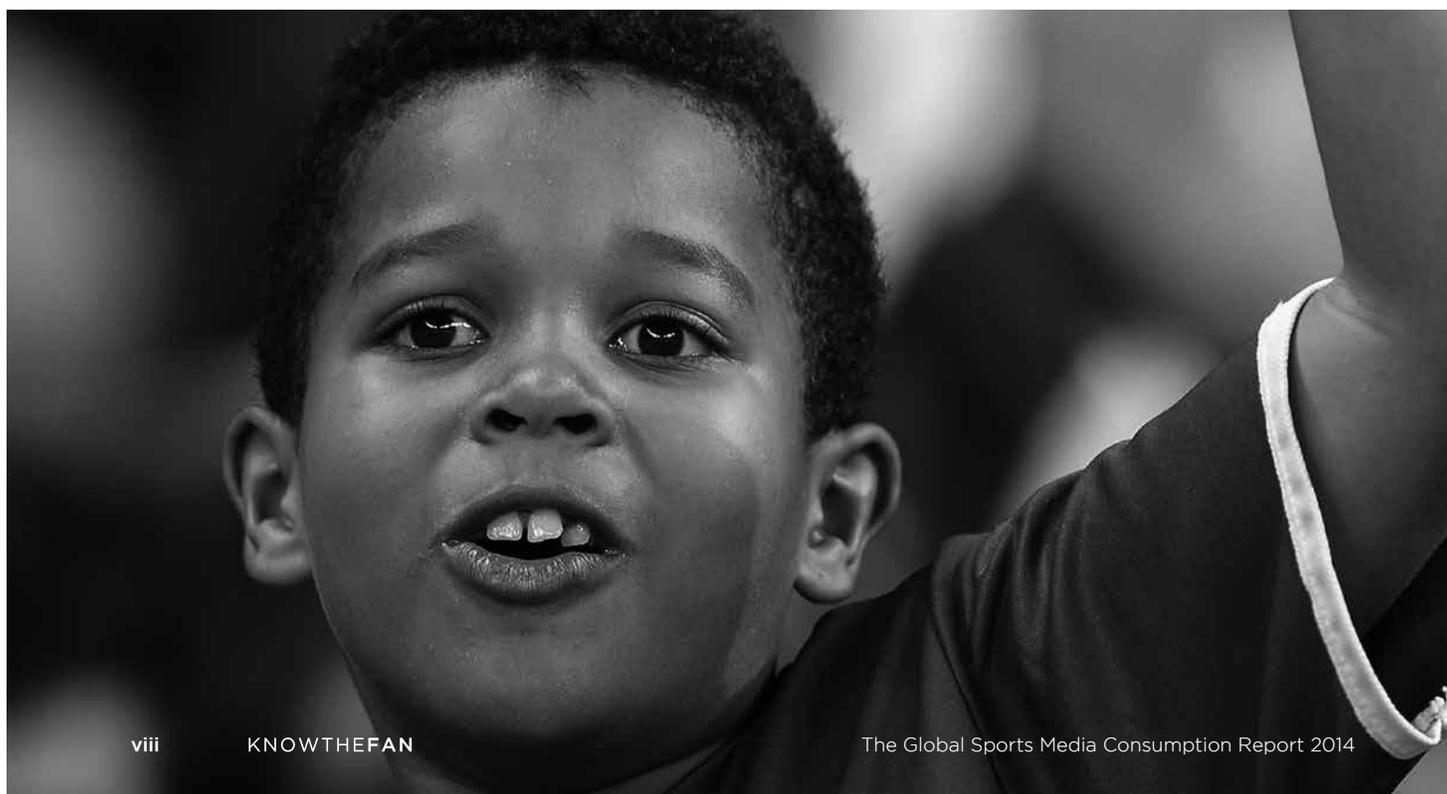
But harnessing social media in the right way presents certain challenges for businesses. Social media is largely, though not exclusively, a passion of the young. And most of the companies in the sports media value chain are run by fortysomethings upwards.

“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 organization 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 behaviors 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 soccer - 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 sports 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.”





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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, radio, online, social), a wide range of devices (televisions, connected TVs, smartphones, 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 US were monitored last year, while 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 US 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 sports has continued to evolve. In 2014, online is established as the second most popular method behind TV that fans use to consume sports across all sixteen markets surveyed.

Mobile and social media consumption of sports 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 while they are watching sports on TV.

The report analyzes the specific devices used by fans to follow sports 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 Sporting News Media, research agency KantarSport, and industry leading sports media company SportBusiness Group.

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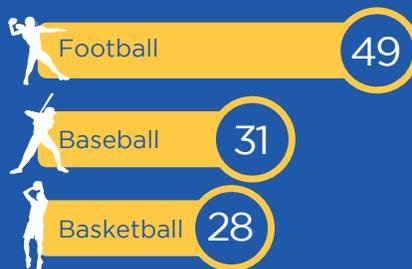
US SPORTS CONSUMPTION OVERVIEW



70%

of the adult population in the US, 168 million fans, claim to follow sports

Top 3 sports followed in US (%)



55%

of sports fans are male



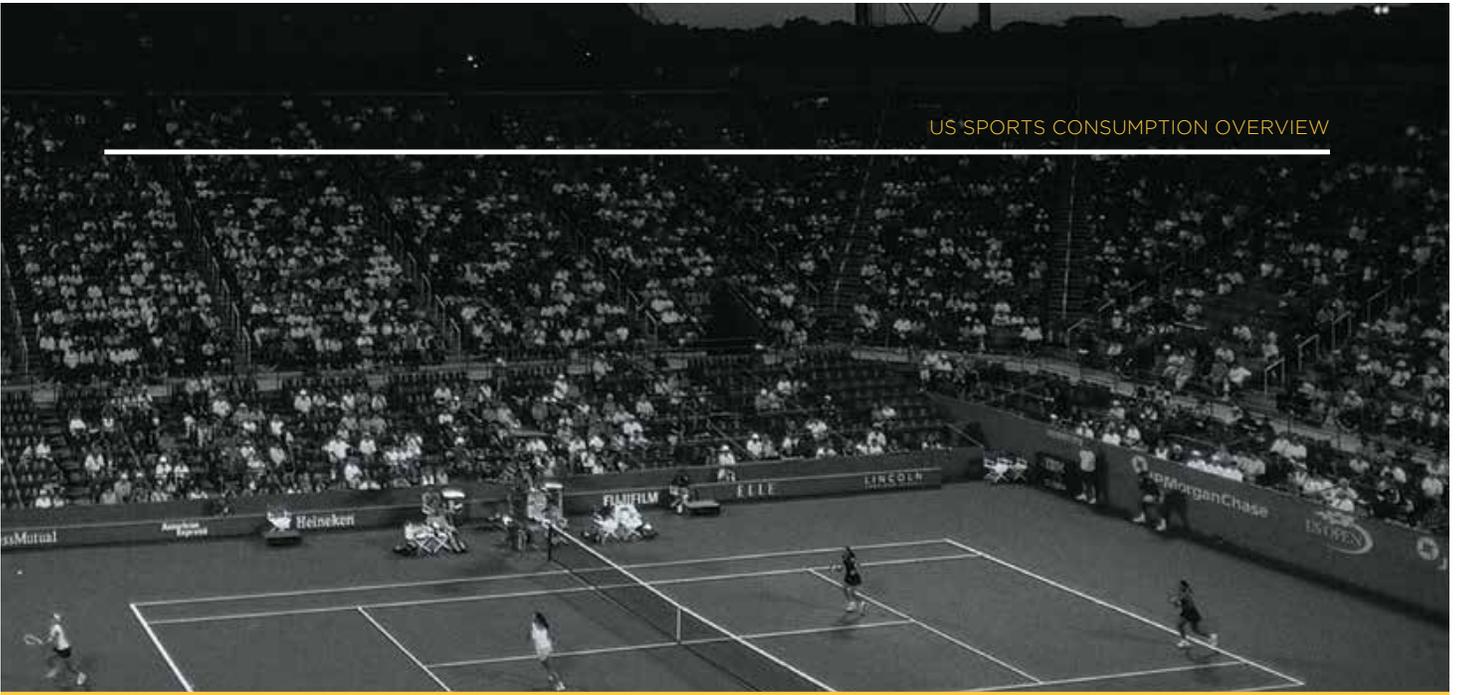
42%

of fans consume sports content via a mobile device



7.7

hours per week are spent by fans consuming sports content



96%

of fans consume sports via television, remaining the most popular method used to consume sports



34%

of fans have paid to watch sports on TV in the last 12 months



38%

of fans that access sports content via a computer do so at least once a day



31%

of online fans watch sports video highlights online



57%

of online fans read sports news content online



45%

of fans use a second screen device while watching sports on TV



68%

of fans consume sports online



19%

of social fans share short clips of games on social networks



Following sports on social networks (%)



ENGAGED FOOTBALL FANS



43%

of engaged football fans attend games



1 in 2

engaged football fans read online via a computer



92%

of engaged football fans watch on television



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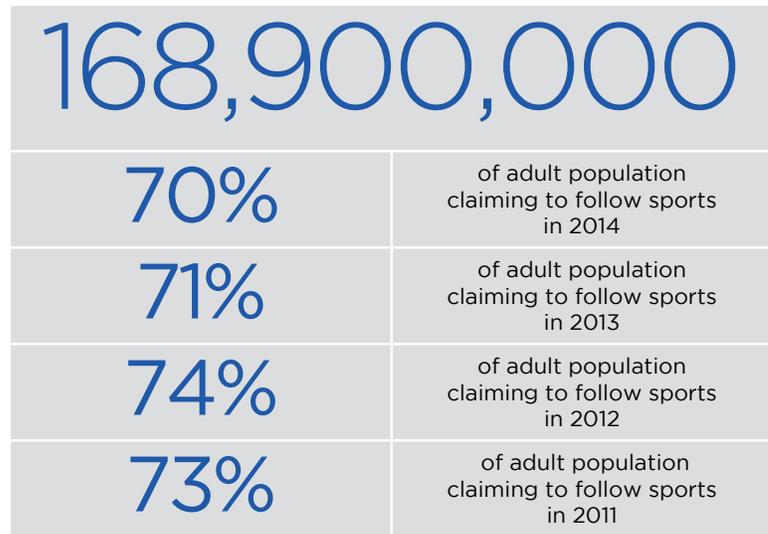
70%
OF THE ADULT
POPULATION CLAIM
TO FOLLOW SPORTS

Sports Consumption Overview

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

The audience of people following sports has remained consistent in the US with 70% of the population claiming to follow sports. This equates to over 168 million sports fans.

Figure 1: Size of sports following in the US



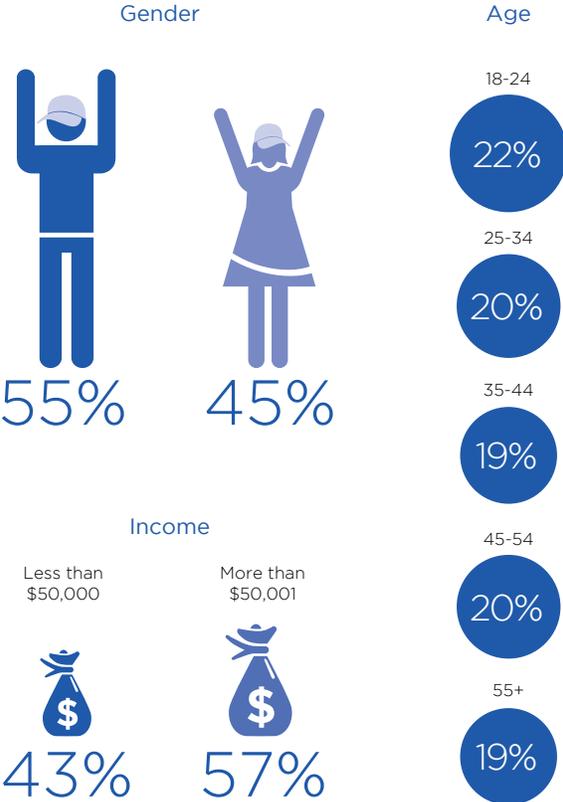
Follow = watch live or highlights coverage and/ or read about frequently and/ or talk about frequently.

Profile of a sports fan in the US

Compared to the population as a whole, the sports fan base is skewed towards males. The fan base is well represented across all age bands, which is consistent with the wider population generally.

Figure 2: Profile of a sports fan

(How to read: 55% of sports fans in the US are male)



1 in 5
SPORTS FANS
ARE BETWEEN THE
AGES OF 25 AND 34

- AUS
- BRA
- CHN
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- GBR
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- IDN
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- UAE
- USA**

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1 in 2

ADULTS FOLLOW FOOTBALL



31%

OF ADULTS FOLLOW BASEBALL

Top 10 sports followed in the US

Sports fans in the US typically follow between 3 and 4 sports. The popularity of sports has remained relatively unchanged since 2011 with football continuing to be the most followed. Baseball and basketball retain their positions as the second and third most popular sports while NASCAR and hockey are followed by 15% of the adult population.

Figure 3: Top 10 sports followed in the US

Top 10 sports followed in March/ April 2011, February/March 2012, February 2013, February 2014 (figures in brackets represents the proportion of adults aged 18+ following each)

2011	2012	2013	2014
Football (42%)	Football (45%)	Football (51%)	Football (49%)
Baseball (35%)	Baseball (35%)	Baseball (33%)	Baseball (31%)
Basketball (31%)	Basketball (33%)	Basketball (29%)	Basketball (28%)
Soccer (19%)	Soccer (24%)	NASCAR (14%)	NASCAR/ Hockey (15%)
NASCAR (17%)	NASCAR (21%)	Hockey/ Golf (12%)	
Golf/ Hockey (15%)	Hockey (19%)		Golf (13%)
	Golf (15%)	Tennis (9%)	Tennis (10%)
Tennis (10%)	Tennis (13%)	Soccer/ Gymnastics/ Swimming (8%)	Soccer (9%)
Boxing (9%)	Gymnastics (11%)		Boxing/ Gymnastics (7%)
Gymnastics (8%)	Boxing/ Figure Skating (10%)		

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

Methods used by fans to follow sports in the US

As in previous years television continues to be the method through which almost all fans in the US follow sports. Online consumption of sports remains firmly established as the second most popular method, with approximately two-thirds of fans following sports online. Consumption via mobile devices and via social networking platforms have both seen significant increases in use this year with approximately 4 out of 10 fans accessing sports content via a mobile device and over a third of fans now following sports on social networking platforms. Use of print remains static with 1 in 2 fans consuming sports via this method.

Figure 4: Methods sports fans use to consume sports

	% of sports fans using each method to consume sports in ...			
	2011	2012	2013	2014
 Watch on TV	96	97	94	96
 Print	53	61	52	50
 Online	56	66	63	68
 Mobile	21	34	35	42
 Listen to on radio	42	50	44	41
 Attend	51	57	50	52
 Social Network Platforms	15	26	25	35

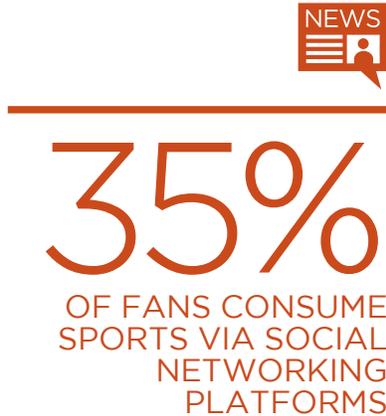
Print: includes newspapers and magazines

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, listen online 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 program such as a podcast (2011 - 2013 distinguished between listening via a radio and online)



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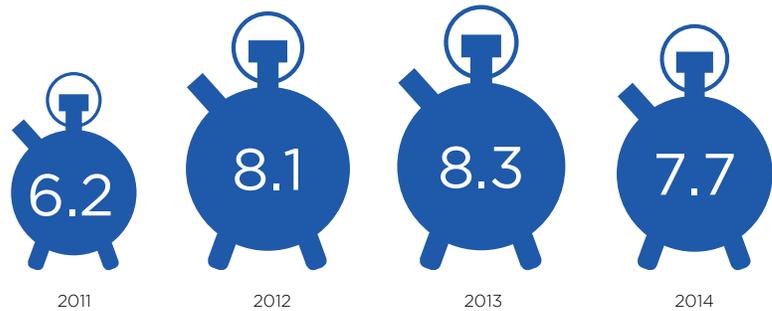
HOURS PER WEEK
ARE SPENT BY FANS
CONSUMING SPORTS
CONTENT

Time spent per week consuming sports

Sports fans in the US spend on average over 7.5 hours per week consuming sports content. This represents a slight decrease in time spent following sports year over year (based on the same activities that were measured in 2013). However, fans are still spending significantly more time per week following sports than they were three years ago. The decrease in time spent is primarily driven by fans spending less time watching sports on TV.

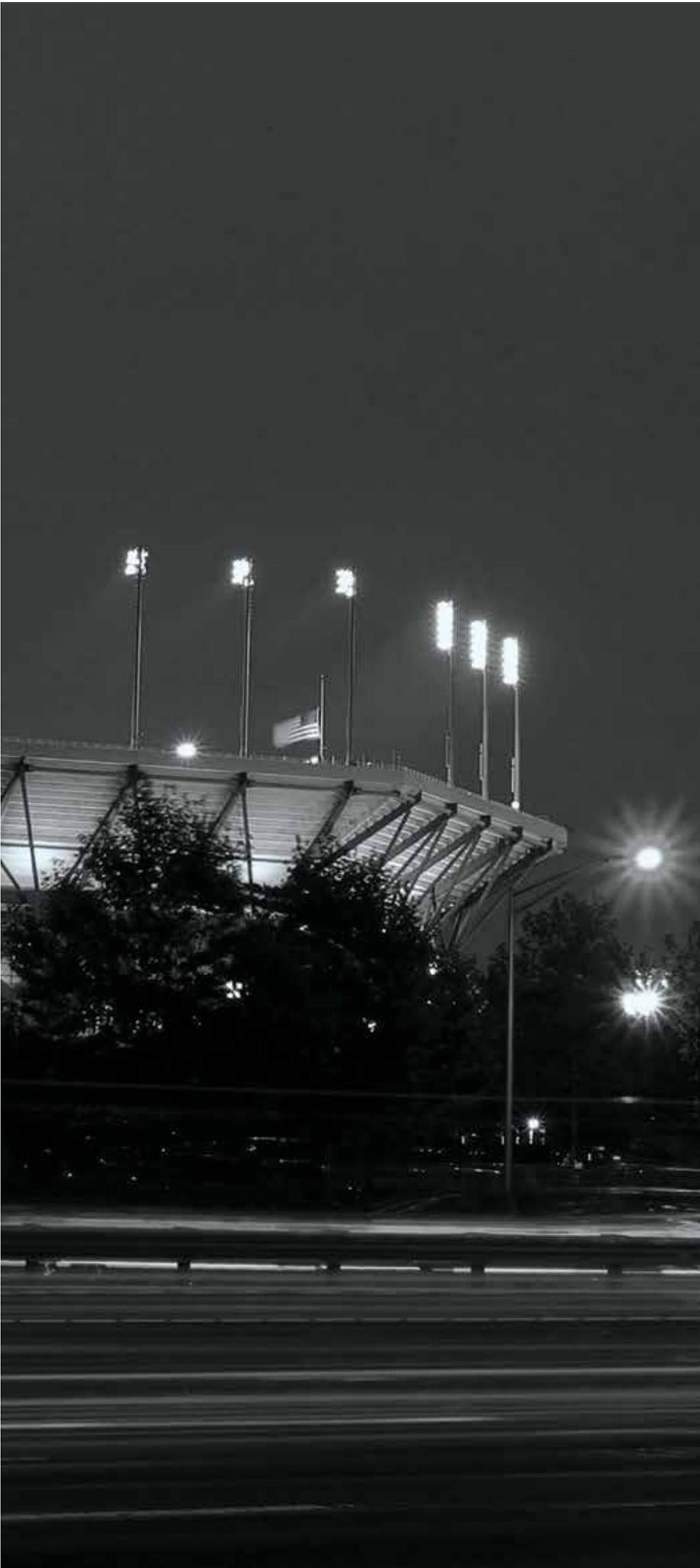
Figure 5: Hours spent per week consuming sports

Average number of hours sports fans spend per week consuming sports



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 program as one activity whereas 2011-2013 listening to a radio and online were 2 separate activities.



CONSUMING SPORTS ON TV

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96%

OF FANS WATCH SPORTS ON TV

Consuming Sports On TV

This section provides insight into how fans consume sports on TV.

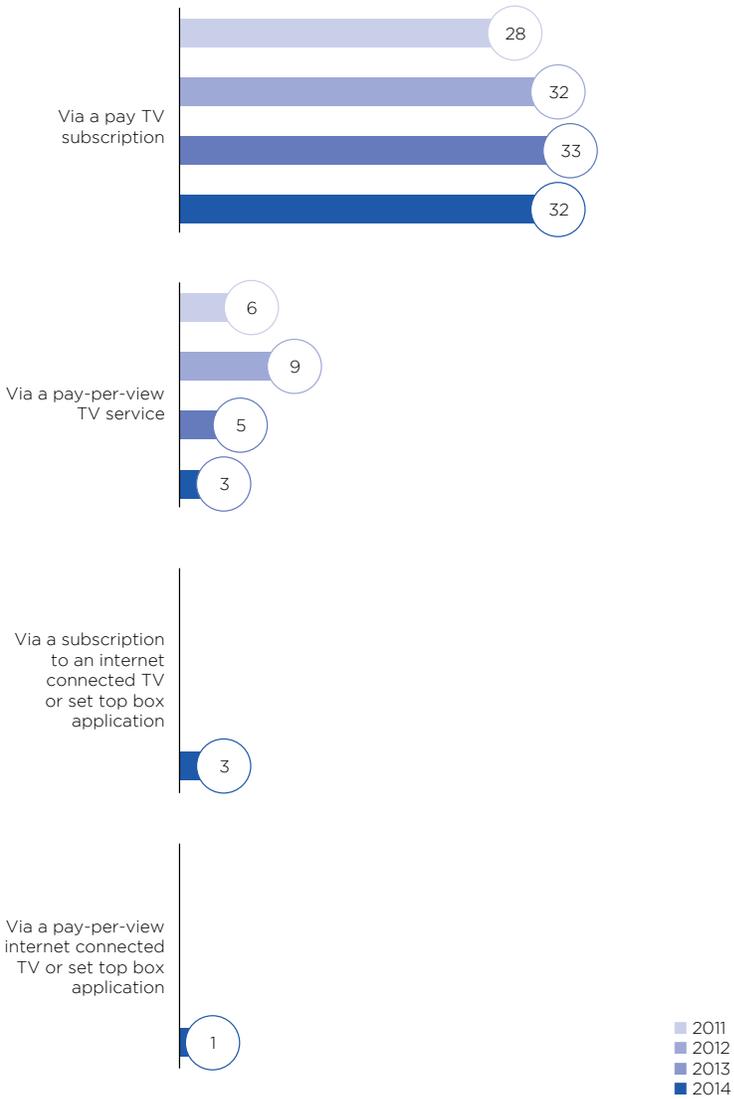
As shown in Figure 4, almost all sports fans (96%) watch sports on TV and they spend on average 3.3 hours a week following sports via this method. The time spent consuming sports on TV has actually decreased year over year (3.8 hours in 2013), although the average time spent by fans is still one of the highest when compared to the other 15 markets surveyed. 6 out of 10 fans in the US will also catch up with sports news stories via TV news, the most popular method used.

Paying to watch sports on TV

Overall 34% of fans have paid to watch sports on TV in the last 12 months, which is consistent with the number of fans who did so in 2013. Approximately 1 in 3 fans have paid via a subscription, as per last year, while 3% have paid via a pay-per-view service, representing a decrease from the 9% high that occurred in 2012. Of the additional payment methods listed this year, 3% of fans have paid to watch via a subscription to an internet connected TV or set top box application.

Figure 6: How fans have paid to watch sports on TV in the last 12 months

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



Please note: 2014 includes via a subscription/ pay-per-view to an internet connected TV or set top box application



32%
OF FANS HAVE PAID TO WATCH SPORTS VIA A PAY TV SUBSCRIPTION IN THE LAST 12 MONTHS

- AUS
- BRA
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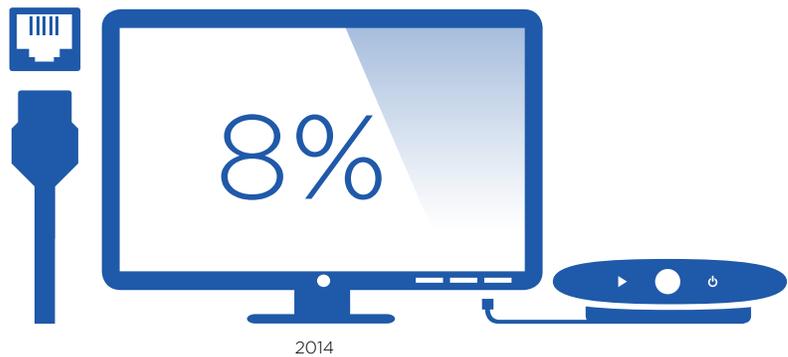
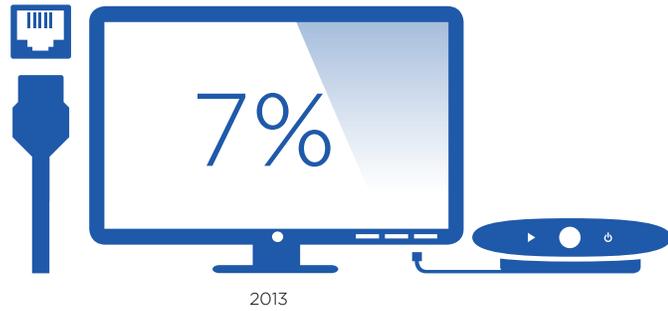
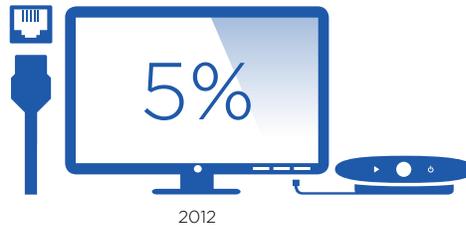
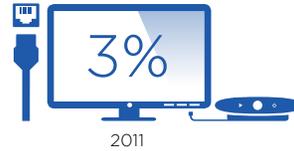
8%

OF FANS CONSUME SPORTS VIA A CONNECTED TV

Consuming Sports On Connected TV

The uptake of connected TV has increased slightly year over year with 8% of sports fans in the US claiming to follow sports via this method, representing the greatest penetration over the past 4 years.

Figure 7: Consuming sports via connected TV (% of sports fans consuming sports via an internet connected TV or set top box, or gaming consoles connected to the TV)



Please note: 2013 and 2014 includes via an internet connected TV or set top box and/ or via a gaming console connected to the TV

Using a second screen connected device while watching sports on TV

Just under 1 in 2 fans (45%) in the US claim to have used an internet connected device such as a computer, laptop computer, smartphone or tablet at the same time as watching sports on TV. Fans that use a second screen while watching sports on TV typically use these devices for approximately 2 different activities.

38% of second screen fans state that they have used a device for non-sports related content. Among the sports content that is accessed on a second screen, following live text commentary of other games/ events being played is the most popular, with 44% claiming to do this. Another popular activity is communicating with friends via a second screen device about the sports event on TV and 1 in 5 states that they watch clips/ highlights of other games being played.

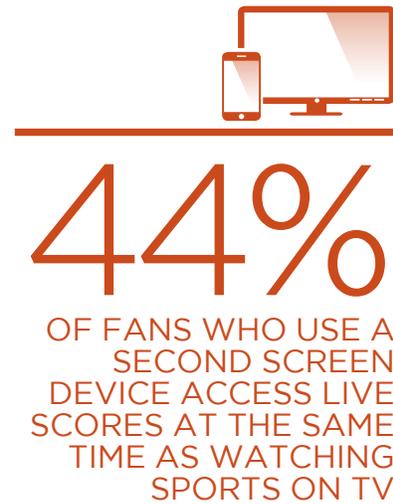
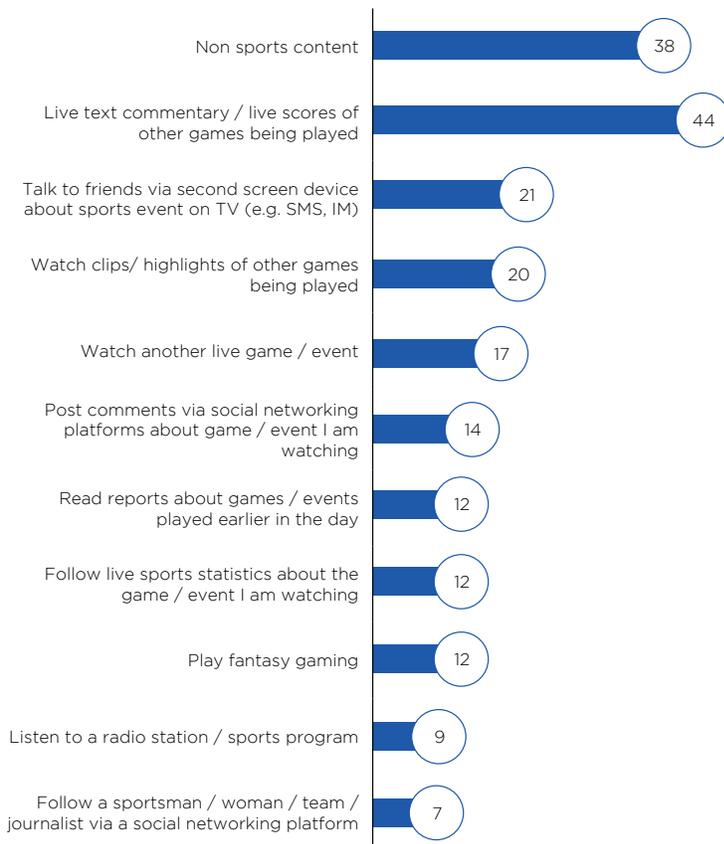


Figure 8: Second Screen Consumption

(Type of content accessed on second screen devices at the same time as watching sports on TV)



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TA NETS ON SALE NOW!
SEE HOW WE
ARE IMPROVING OUR TICKETS

Speed
of Shot
of Eye Vision

HONDA

TOSHIBA
Leading Innovation >>>

FOX LIVE NIGHTLY

CHOC Children's Hospital

SANOMAN
NICKEL & DIME



CONSUMING ONLINE SPORTS ONLINE

AUS

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USA



42%

OF FANS ACCESS SPORTS CONTENT VIA A MOBILE DEVICE

Consuming Sports Online

This section provides insight into how fans are consuming sports 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 analyzes the devices used by fans to access sports content online, which include online via a computer/ laptop computer, and online via a mobile device (both smartphones and tablets).

Approximately two-thirds of fans in the US follow sports online, with penetration increasing from 56% in 2011. The majority of online fans access content via a computer or laptop computer, representing 65% of the total sports fan base. Smartphones are more widely used than tablets among the 42% of fans that follow sports via a mobile device, with a third of all fans using a smartphone and 1 in 5 using a tablet computer to consume sports.

Figure 9: Devices used to access sports content online

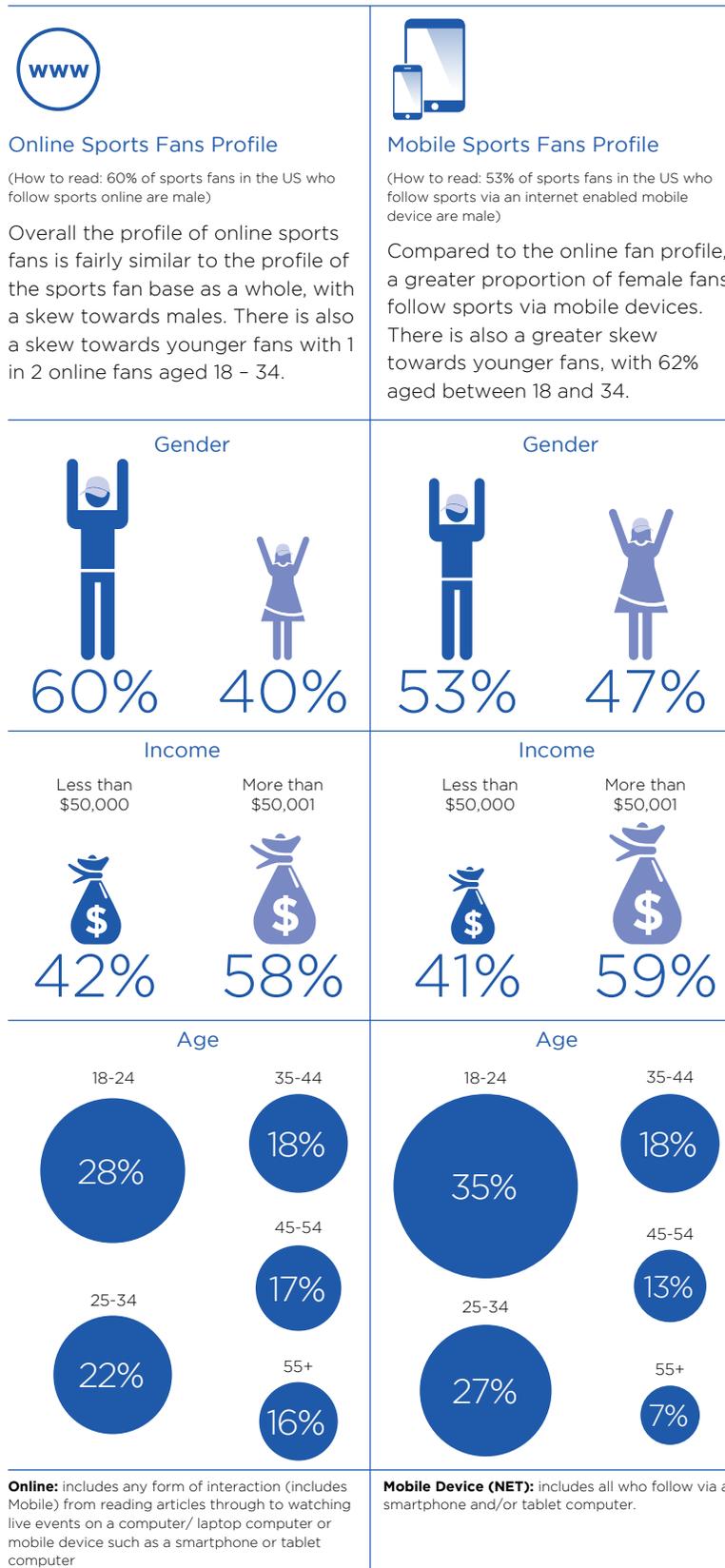
(How to read table: 65% of fans access sports content online via a computer/ laptop computer)

	Via a computer/ laptop computer	Via a Smartphone	Via a Tablet Computer	Via a Mobile Device (NET)
2011	N/A	N/A	N/A	21
2012	N/A	N/A	N/A	34
2013	59	25	18	35
2014	65	34	22	42

Online: includes any form of interaction (includes Mobile) from reading articles through to watching live events on a computer/ laptop computer or mobile device such as a smartphone or tablet computer

Mobile Device (NET): includes all who follow via a smartphone and/or tablet computer.

Figure 10: Profile of online and mobile sports fans




58%

OF FANS WHO FOLLOW SPORTS ONLINE EARN OVER \$50K



35%

OF FANS WHO FOLLOW SPORTS VIA AN INTERNET ENABLED MOBILE DEVICE ARE AGED BETWEEN 18 AND 24

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-  BRA
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1.5

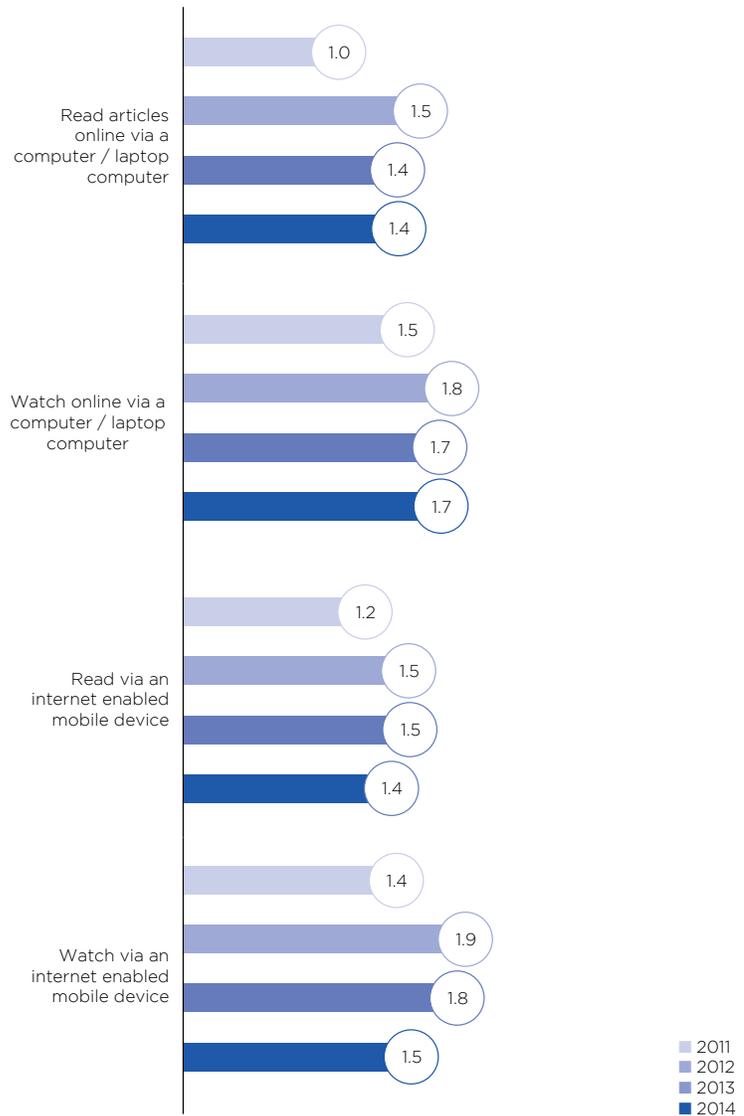
HOURS ARE SPENT WATCHING SPORTS VIA AN INTERNET ENABLED MOBILE DEVICE IN AN AVERAGE WEEK

Time spent per week consuming sports online

The time spent watching and reading sports content online via a computer/ laptop computer has remained unchanged this year. Slightly less time is spent by fans following sports on mobile devices in 2014, however, a greater proportion of fans are reading and watching content on these devices this year.

Figure 11: Hours spent per week consuming sports online

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



Frequency of consuming sports content online

The frequency of accessing sports content online via computers/laptop computers and mobile devices remains consistent year over year where just over one-third access content on these devices at least once a day and three-quarters access content at least once a week.

Figure 12: Frequency of accessing sports content online

(How to read: 38% of fans that access sports content online via a computer/ laptop computer do so 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
2013	39	77	36	73
2014	38	75	36	75



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AUS

BRA



CHN

9%

FRA

OF FANS HAVE PAID TO WATCH SPORTS ONLINE IN THE LAST 12 MONTHS

GER

GBR

1 in 10

IND

FANS WOULD BE WILLING TO PAY FOR LIVE SPORTS CONTENT ONLINE

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ITA

JAP

RUS

RSA

SPA

TUR

UAE

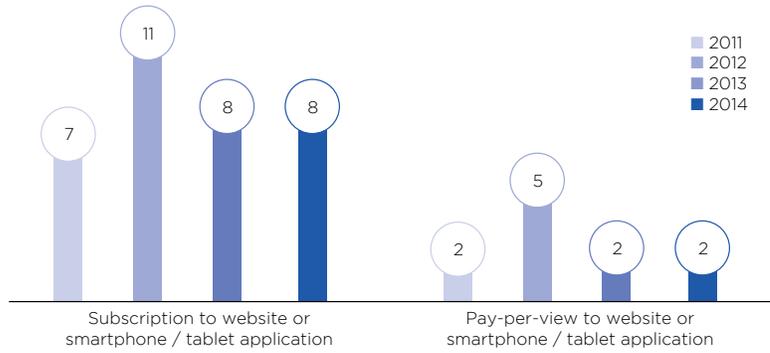
USA

Paying to watch sports online

The proportion of fans paying to watch sports online in the US has remained unchanged where 9% of sports fans have paid to watch sports online in the last 12 months. The majority of these fans have paid via a subscription rather than a pay-per-view payment method.

Figure 13: How fans have paid to watch sports online in the last 12 months

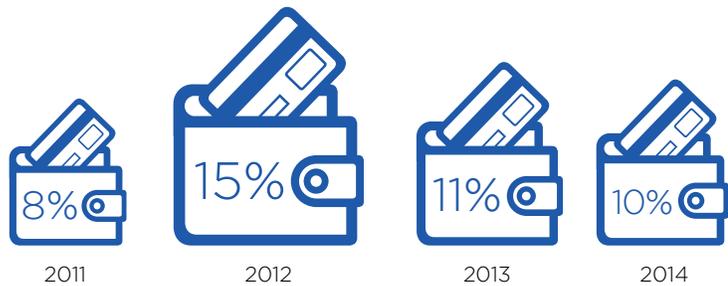
(% of sports fans stating the way in which they have paid to watch sports in the last 12 months)



The willingness of fans to pay for live sports content online is very much in line with the number of those who actually do.

Figure 14: 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)

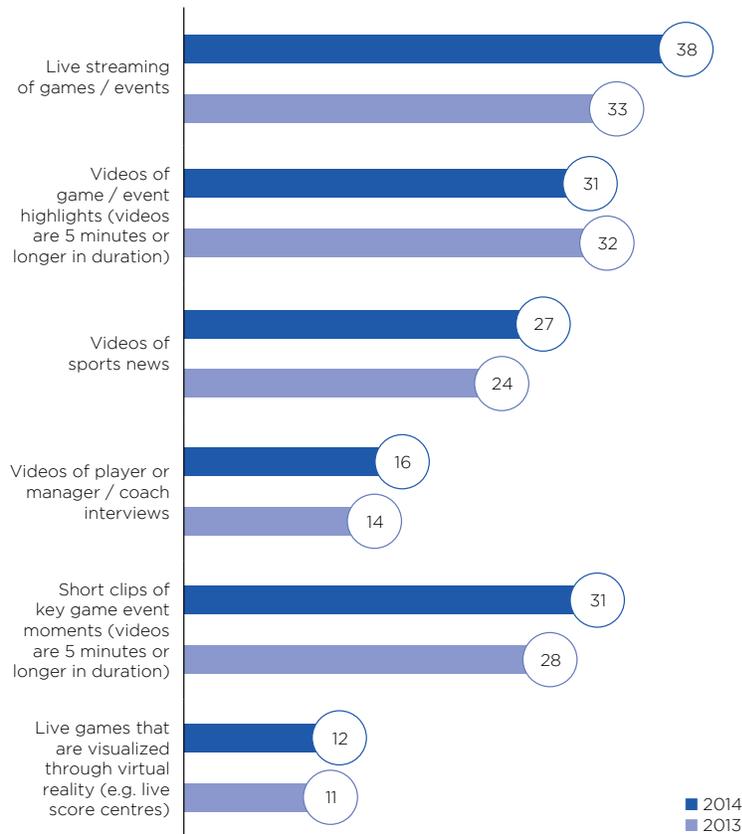


Watching sports content online

Among fans that watch sports online, live streaming remains the most popular content accessed where a greater proportion of online fans are watching this type of content year over year. Short clips of games are also more popular in 2014 while longer highlights continue to be watched by approximately 3 out of 10 online fans.

Figure 15: Sports content watched online

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



WWW

38%

OF ONLINE FANS WATCH LIVE STREAMING OF SPORTS EVENTS

- AUS
- BRA
- CHN
- FRA
- GER
- GBR
- IND
- IDN
- ITA
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27%

OF FANS THAT WATCH LIVE STREAMING OF GAMES/EVENTS DO SO VIA A TABLET

The computer/laptop computer is the primary means through which fans watch online content. However, mobile devices are also used, and in particular for content that is typically shorter in duration such as short highlights clips. Use of mobile devices for short clips has increased from 50% in 2013 to 58% in 2014. Smartphones are generally used more so than tablets, which is likely linked to the penetration of these devices in the US. However, tablets are more popular than smartphones for live streaming which may be attributed to their greater screen size which will enhance the users' experience of this content.

Figure 16: Devices used to watch sports content online

(How to read table: 89% of fans that watch live streaming of games/events online do so via a computer/laptop computer)

Sports Content Watched Online	Via a Computer/ Laptop Computer	Via a Smartphone	Via a Tablet	Via a mobile device (NET)
Live streaming of games/ events	89	22	27	39
Videos of game/ event highlights	81	34	28	51
Videos of sports news	83	36	32	49
Videos of player or manager / coach interviews	80	37	28	56
Short clips of key game / event moments	78	41	33	58

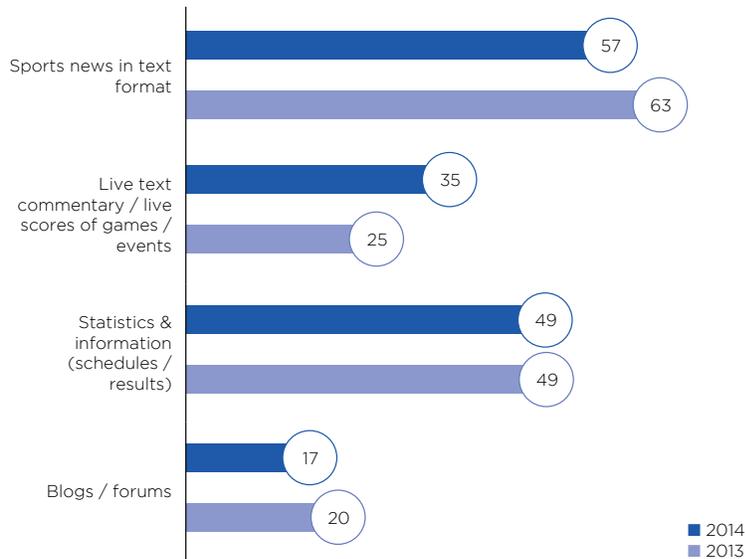
Mobile Device (NET): includes all who follow via a smartphone and/or tablet computer

Reading sports content online

Sports news continues to be the most popular content read online, followed by statistics and information. This year has seen a greater demand for live text commentary of games as more fans are trying to keep up with events in real time.

Figure 17: Sports content read online

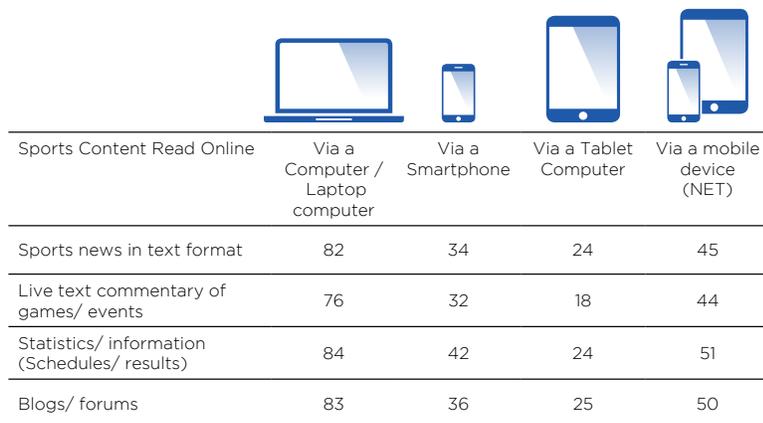
(Type of content read online by fans that access sports content online)



As with watching sports online, computers/ laptop computers are the most commonly used devices to access sports content in text format. Mobile devices are also used in addition to rather than instead of computers where smartphones are more widely used than tablets.

Figure 18: Devices used to read sports content online

(How to read table: 82% of fans that read sports news in text format online do so via a computer/ laptop computer)



Mobile Device (NET): includes all who follow via a smartphone and/or tablet computer


57%
 OF ONLINE FANS READ SPORTS NEWS IN TEXT FORMAT

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UAE

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RSA

SPA

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UAE

USA



32%

OF FANS USE TEAM/LEAGUE SITES OR APPS TO ACCESS SPORTS CONTENT ONLINE

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

Online sports fans in the US typically use 2 websites in an average week to access sports content. In terms of the type of sites used, general sites are the most popular in the US ahead of sports broadcasters, while 1 in 3 online fans use team/league sites or apps. 31% of online fans will use newspaper sites to consume sports content. For fans that stream live games online, sports broadcaster websites or apps are the most popular ahead of team/league sites.

Figure 19: Top 5 websites/applications (apps) online sports fans use to access sports content online

(% of fans that access sports content online who use the following websites/apps)

Year	Top 5 types of website/apps used to access sports content				
2014	42%	37%	32%	31%	23%
	General	Sports broadcaster	Team/League	Newspaper	Dedicated sports

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

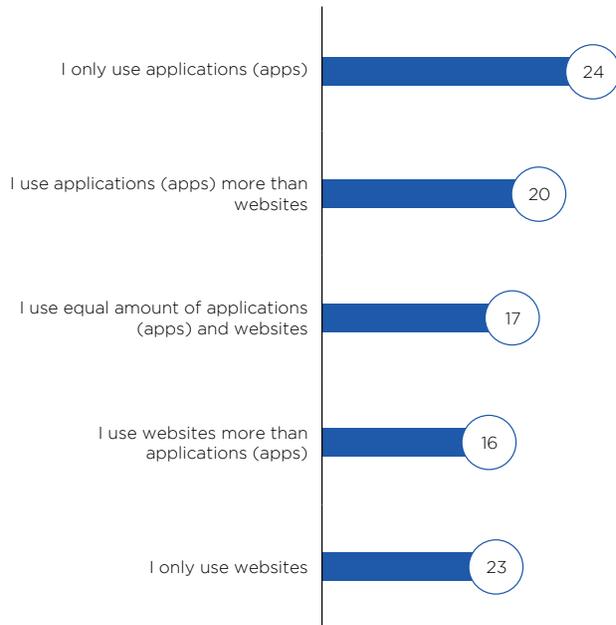
Dedicated sports: refers to websites/apps dedicated to sports but not linked to a newspaper or broadcaster. Example being sportingnews.com

Use of websites and applications (apps) to follow sports on mobile devices

44% of fans that follow sports on mobile devices prefer to use apps over websites, while 39% have a preference for websites. Approximately 1 in 6 mobile fans use an equal amount of apps and websites. These findings therefore suggest that there is a not an overwhelming demand for apps over websites.

Figure 20: Use of websites and applications (apps) to follow sports on mobile devices

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



1 in 4
MOBILE FANS ONLY USE APPS TO FOLLOW SPORTS ON A MOBILE DEVICE

- AUS
- BRA
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- GBR
- IND
- IDN
- ITA
- JAP
- RUS
- RSA
- SPA
- TUR
- UAE
- USA



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CONSUMING SPORTS VIA
SOCIAL NETWORKING
PLATFORMS

AUS

BRA

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FRA

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IND

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JAP

RUS

RSA

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USA



38%

OF SPORTS FANS WHO FOLLOW SPORTS VIA SOCIAL NETWORKING PLATFORMS ARE BETWEEN 18 AND 24

Consuming Sports Via Social Networking Platforms

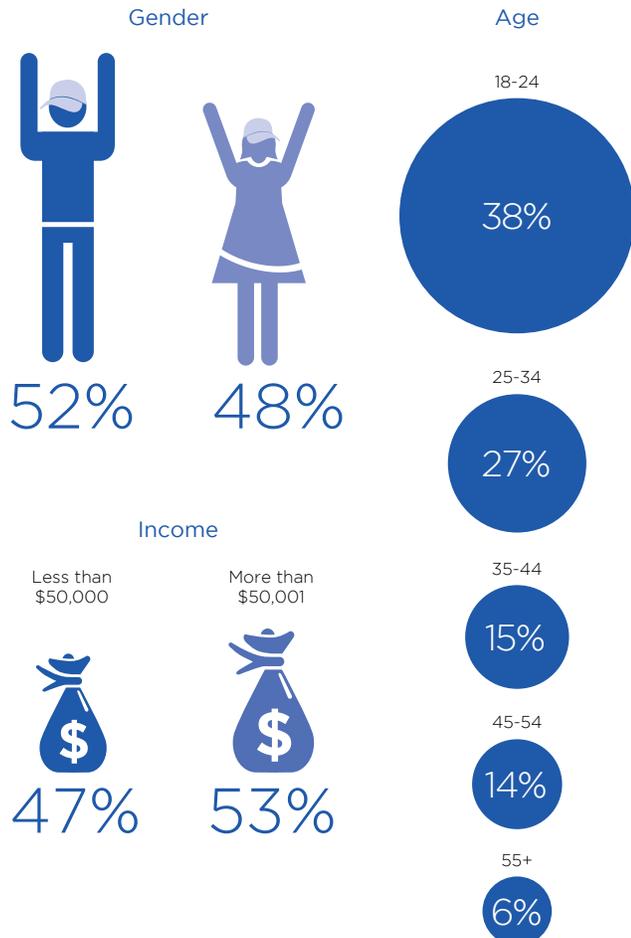
This section provides insight into how fans are consuming sports via social networking platforms.

2014 has seen a significant increase in the number of fans in the US following sports via social networking platforms where now over a third of fans consume sports on these platforms. The time fans spend following sports on these platforms has decreased slightly however to just under 1.5 hours per week, which is consistent with the time spent in 2011 and 2012.

Social networking fans are heavily skewed towards younger fans, with 65% aged 18 - 34. There is generally an even split across gender and income.

Figure 21: Profile of social networking sports fans

(How to read: 52% of sports fans in the US who follow sports via social network platforms are male)

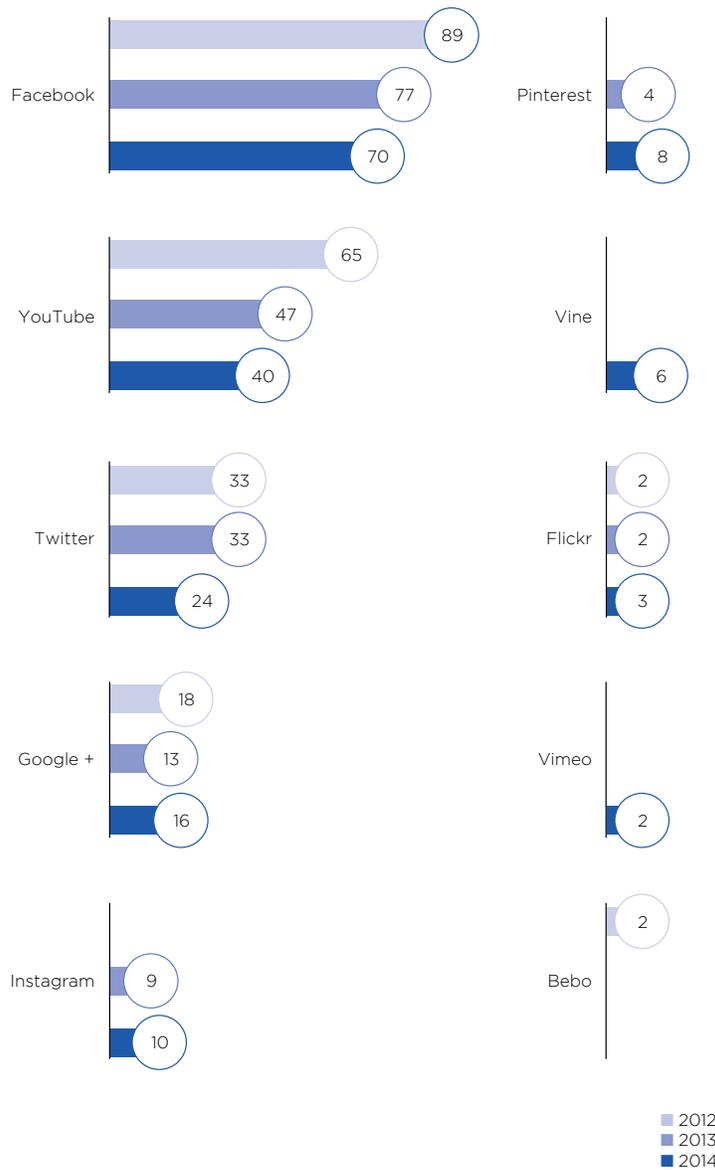


Social networking platforms used to access sports content

Fans typically use an average of 2 social networking platforms to follow sports which is consistent with last year. As indicated in Figure 22, the popularity of Facebook, YouTube and Twitter has decreased this year; however, they remain the most popular sites used to follow sports. Their drop in use suggests that fans are increasingly making use of other available social networking platforms.

Figure 22: Social networking platforms used to follow sports

(% of fans using social networking platforms to follow sports that use each platform)




7 in 10
SOCIAL FANS FOLLOW SPORTS ON FACEBOOK

- AUS
- BRA
- CHN
- FRA
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35%

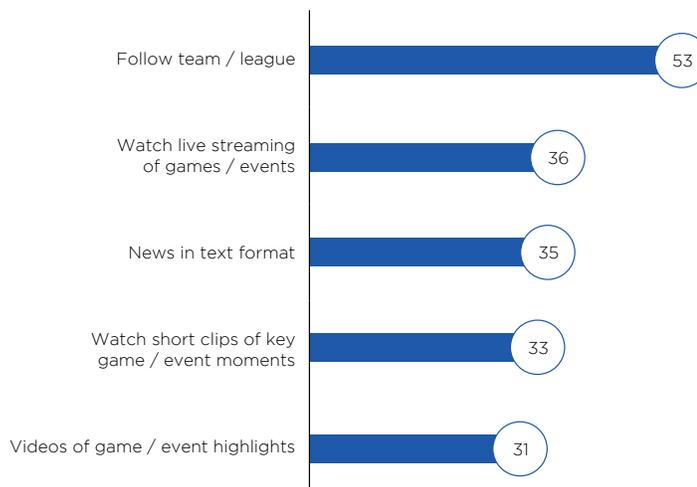
OF SOCIAL FANS USE SOCIAL NETWORKING PLATFORMS TO ACCESS NEWS IN TEXT FORMAT

Sports content accessed on social networking platforms

Half of social networking fans state that they follow a team or league on these platforms while 36% watch live streaming of sports.

Figure 23: Top 5 types of sports content accessed on social networking platforms

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

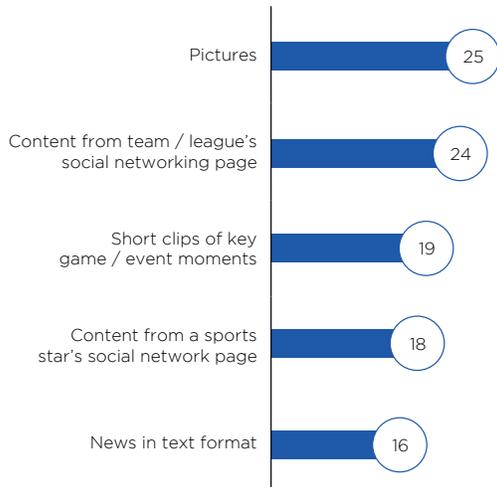


Sports content shared on social networking platforms

Pictures are the most popular content shared and 1 in 5 fans state that they share short clips via social networking platforms.

Figure 24: Top 5 types of sports content shared on social networking platforms

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



AUS
BRA
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1 in 4
SOCIAL FANS
USE SOCIAL
NETWORKING TO
SHARE SPORTS
PICTURES

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RSA

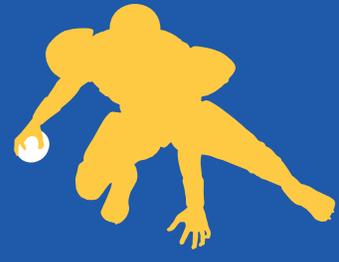
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UNDERSTANDING FOOTBALL FANS IN THE US

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49%
OF ADULTS FOLLOW
FOOTBALL

Understanding football fans in the US

This section provides insight into football fans in the US, the most popular sport followed by fans. Kantar Sports fan segmentation is able to split football fans into those who are highly engaged with the sport through to those who are less engaged.

In the US, football is followed by 49% of the adult population, representing approximately 117 million fans. 56% of these fans are engaged fans (have a high degree of emotional attachment), representing 66 million engaged football fans.

Figure 25: Football fans and engaged football fans

242m	Adult population
117m	Football fans
66m	Engaged football followers

Methods used by fans to follow football in the US

As Figure 26 indicates, football fans and engaged football fans have a similar propensity to follow football via traditional media such as TV and print. However, engaged football fans follow football via a greater number of methods than the average football fan. In particular, engaged fans are more likely to seek content via digital methods with upwards of 1 in 2 reading football content online via a computer/ laptop computer. Engaged fans are also more likely to follow the sport via social networking platforms when compared to the average fan.

Figure 26: Methods football fans use to consume football

(How to read table: 92% of football fans follow football on TV)

	% of fans using each method to follow football	
	Football Fans	Engaged Football Fans
 Attend	34	43
 Watch on TV	92	92
 Print	46	49
 Watch online via a computer/ laptop computer	22	27
 Read online via a computer/ laptop computer	45	52
 Listen to radio/ sports program	34	40
 Watch via a mobile device	19	23
 Read via a mobile device	21	28
 Social Networking Platforms	24	29

Print: includes newspapers and magazines

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

Attend: includes attendance at any professional sporting event



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 #knowthefan