

A vibrant, stylized illustration of a globe. In the center of the globe is a large, dark blue circle with a white play button icon. The globe is divided into green landmasses and blue oceans. Various people are depicted in different activities: some are swimming in the water, others are running on the land, and some are playing sports like tennis and soccer. The globe is surrounded by a green background with white clouds. Several social media icons are scattered around the globe, including a Facebook 'f' logo, a Twitter bird logo, and a YouTube play button logo. There are also heart icons and a thumbs-up icon. The overall theme is global connectivity and digital interaction.



INTRODUCTION: TO THE REPORT

Early in 2019, we surveyed 9690 people from across the United Kingdom, the United States, France, Italy, Germany, Spain, and Australia.

We asked about their video consumption habits and preferences. Which content do they watch most regularly? Which platforms and devices do they use most often?

Overall, we found that sport is the most popular type of content globally. 53% of consumers watch sport on a regular basis across the globe. Of this group, more than 45% watch sport more often than anything else. This represents 170 million avid sports fans in the countries covered within this study and many hundreds of millions more in other territories around the world.

Sports broadcasters, federations, clubs and athletes are competing for a share of this massive audience.

The fans of popular global sports such as soccer, basketball, American football, cricket, rugby and combat sports want access to the best quality content at a reasonable price. The major leagues and federations want to expand their reach into new markets, whilst broadcasters look to find new, younger viewers to address the rapidly increasing average age of the sports audience on TV. A recent study by Nielsen in showed that none of the major sports in the United States had an average viewer age under 40, with the oldest fans watching PGA Golf, at an average age of 68yrs.

Other sports are trying to grow their fanbase by using digital platforms to reach more fans. Digitally-savvy consumers are receptive to new experiences, almost 20% of sports fans say they choose which content to watch based on their awareness of certain events, offering opportunities for niche sports where digital and OTT form the primary channel for distribution.

Smaller sports, and even those incredibly successful in their domestic markets, now want greater international distribution to help grow revenue. OTT services make it much easier to create global propositions for live sports. In contrast to satellite and linear broadcast TV, the internet can make live sports readily available to everyone that wants to watch.

This report aims to demonstrate how sports publishers across the world can engage consumers who watch sports content the most often - the sports fanatics.

We explore who these fans are, which media services they use and how they see the sports media industry changing over the next few years.

GLOBAL SPORTS FANS

Sports is the most popular type of video content. In this report, we explore the consumption habits and preferences of consumers who watch sports more often than anything else. The report analyzes the behavior of modern sports fans and demonstrates how viewing patterns are changing for sport across the world.

53%

of global consumers
watch sports
regularly

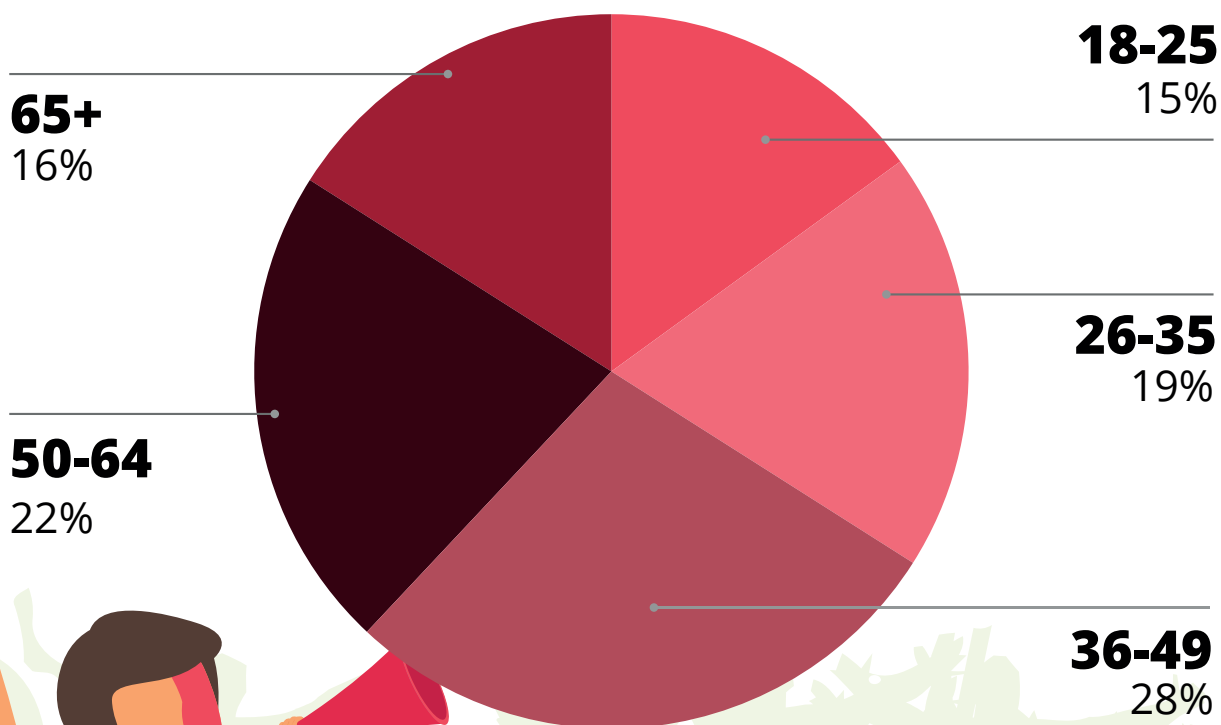
45%

of those people
watch sports watch
it more often than
any other content

Who are they?



*2% prefer not to say



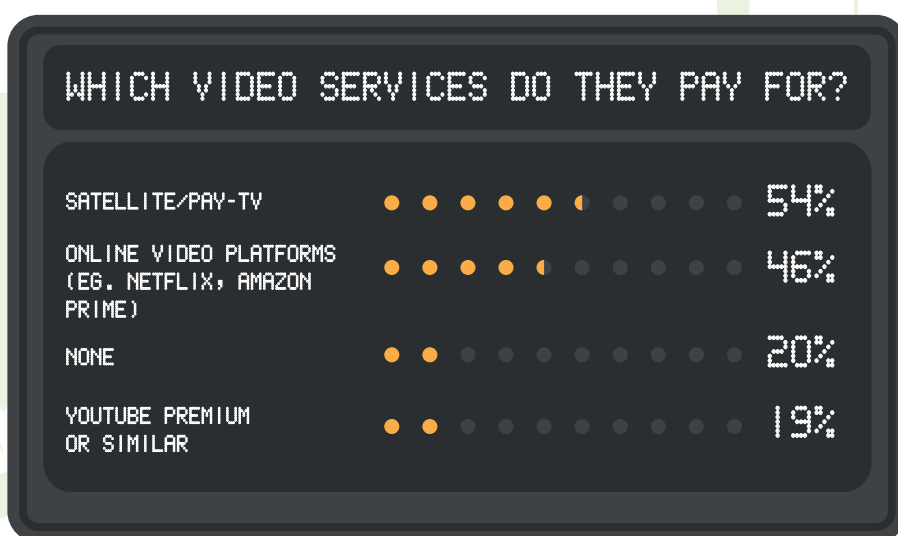
GLOBAL SPORTS FANS

Which video services do they pay for?

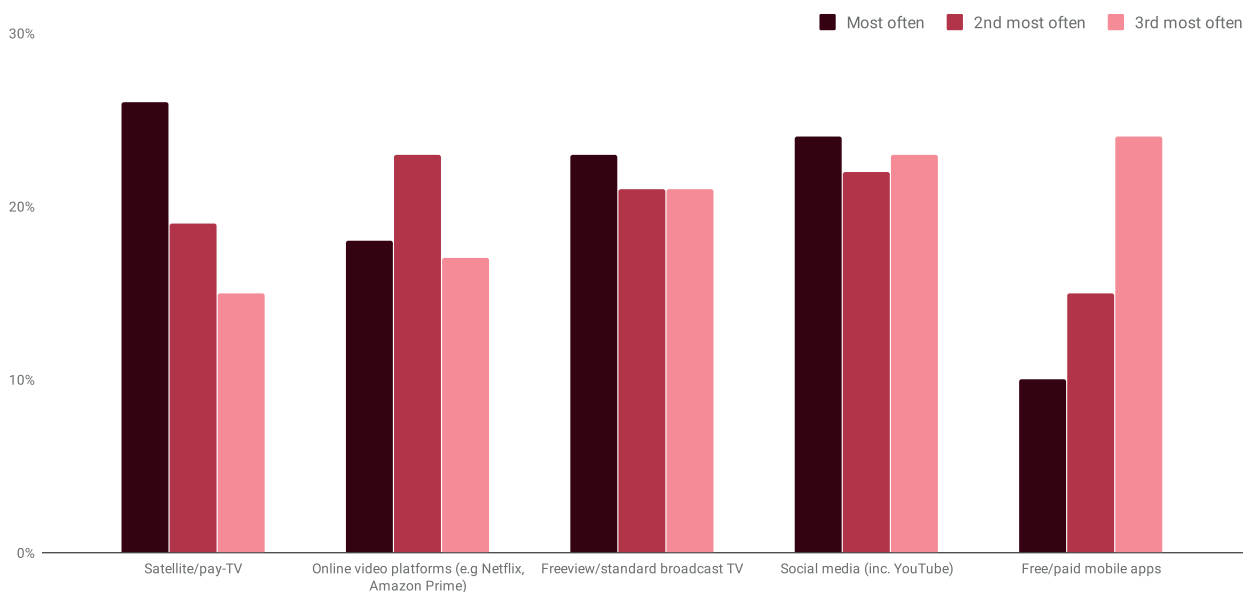
The most popular sports in many leading TV markets have moved behind a paywall in the last 10 years.

Many sports fans have no choice but to subscribe to these services if they want to access their sport on live TV, as satellite or cable companies have acquired the most valuable sports rights.

New sports-focused OTT services have emerged in the last three years, such as DAZN, FuboTV, and Kayo Sports, who are changing the landscape for live sports production.



Where do they watch video most often?



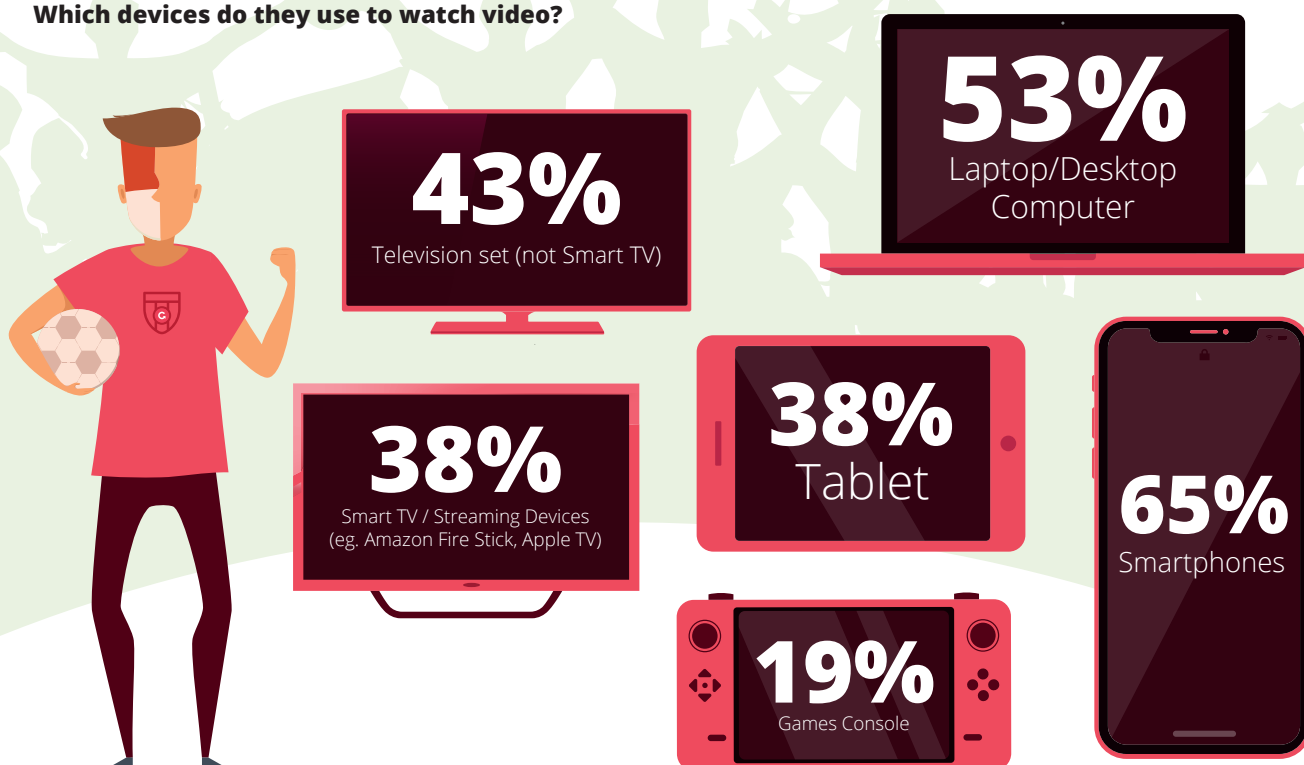
Sports fans watch live games most often through satellite TV.

However, the sports media cycle is now 24/7 and fans want access to their favorite sports at any time of the day. Social video viewing has risen to be the most popular channel for sports video behind pay-TV.

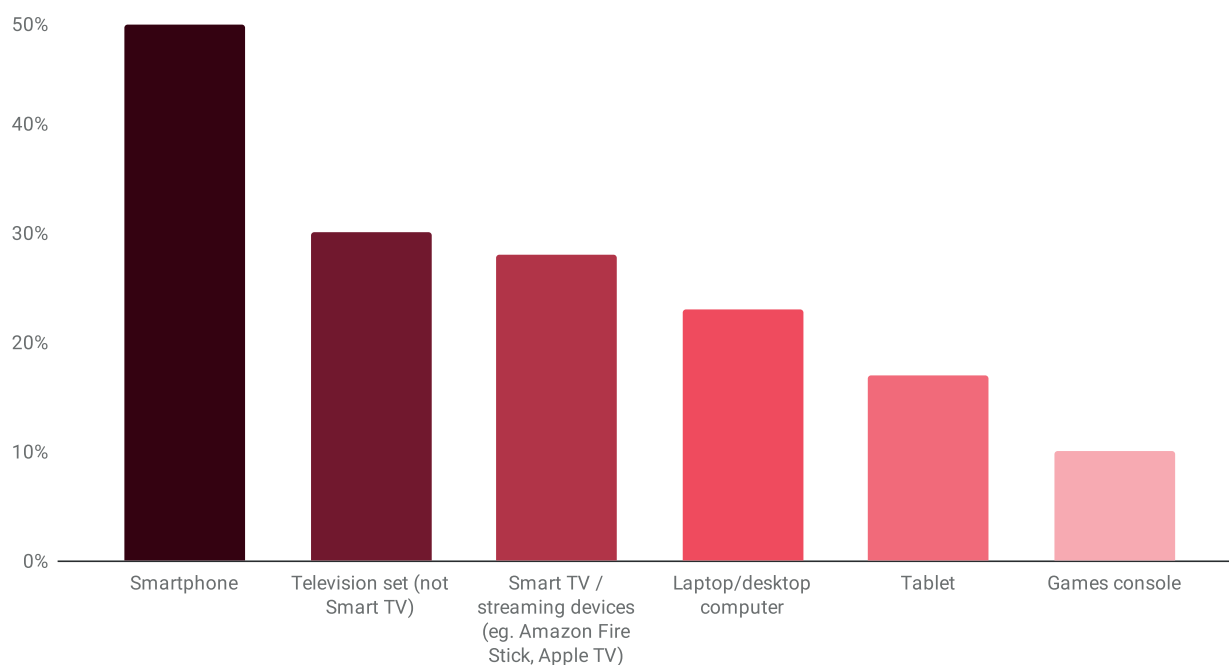
Social media platforms are growing their portfolio of live rights, such as Facebook's deal with MLB and WWE in America. These platforms also allow fans to access real-time clips, extended highlights and other auxiliary content from athletes, leagues, or clubs. This includes behind-the-scenes footage, exclusive lifestyle content and training ground videos. The appetite for this has risen sharply. Mobile and social video clips are available anytime that suits fans, on a range of mobile devices.

GLOBAL SPORTS FANS

Which devices do they use to watch video?



Which devices do sports fans use to watch video most often?

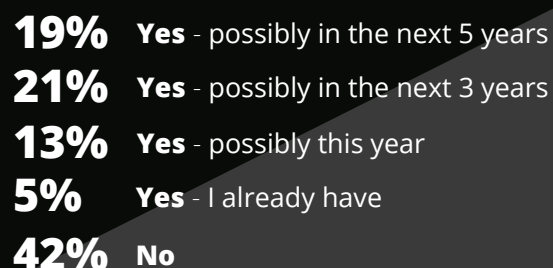


Sports fans watch video most often on smartphones. Away from watching live sports and programming on TV, global consumers access video regularly throughout the day, using their mobile phone. Publishers and broadcasters must focus on creating quality content that is optimized for mobile viewing away from matchdays and live games. Maximizing the value and scope of existing sports media rights, or creating bespoke new content for fans, will win the loyalty of sports audiences looking for more content.

GLOBAL SPORTS FANS

Will sports fans cut the cord?

The dominance of live sports viewing on TV make sports fans less likely to cut the cord than the average global consumer.



What is stopping them from cutting the cord?

34% prefer watching video on broadcast TV

29%

Can't access all the content they want

"NO! DON'T"

"NOOO! WHAT YOU DOING!!"

24%

don't want to watch on a smaller screen

21%

say nothing is preventing them from switching

Live sports viewing is a shared experience. Fans indicate they prefer watching on a big screen with a group of friends, and availability of content and major sports rights remains a key consideration. TV broadcasters still have an advantage in this market, so long as they can hold onto their rights.

Tech giants such as Amazon Prime have entered the sports right market, but we will not know if a new entrant can compete until we see a meaningful offering across major domestic sports rights. OTT providers, like DAZN, are moving towards this goal, while broadcasters are beginning to launch pureplay OTT services such as GolfTV from Discovery.

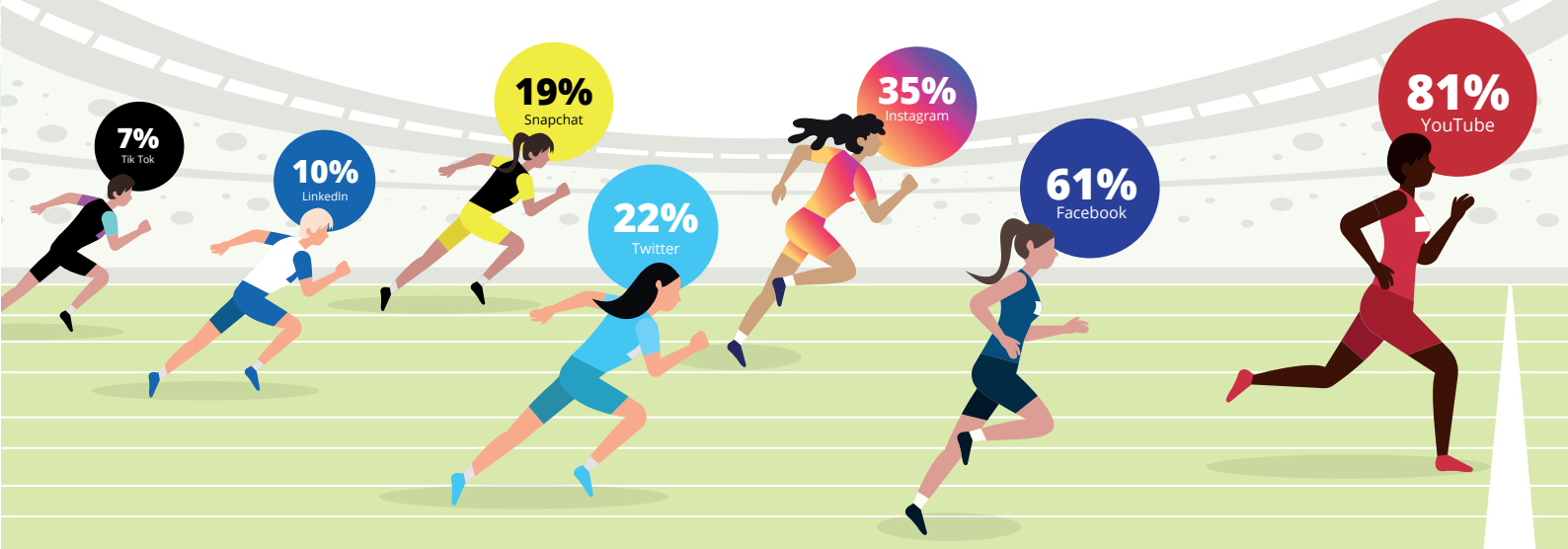
GLOBAL SPORTS FANS

Almost 1 in 5 sports fans use social media apps to watch video every time they log in.

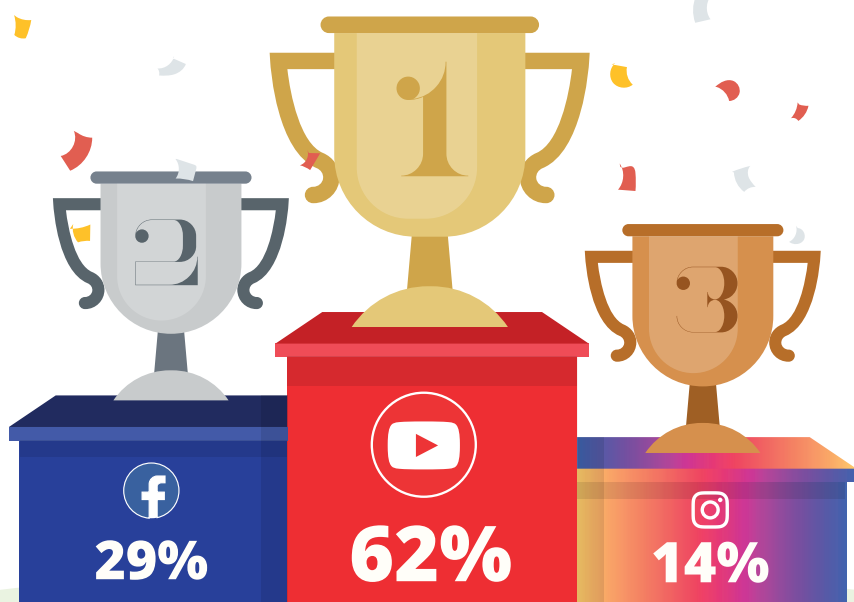
Social platforms are shifting to content channels. Athlete-to-consumer videos across Snap, Instagram and TikTok are becoming a key part of the overall sports video landscape.



Which social media platforms do sports fans use to watch video?



Of the ones they use, which social platforms do sports fans use to watch video most often?



The shift in social video viewing is moving towards live, with longer-form social videos, such as highlight packages, available on YouTube, Facebook and Instagram.

Real-time clips are in high demand, with Twitter emerging as a key destination for real-time video.

Broadcasters and publishers who stream matches live to YouTube and Facebook have seen great success, as BT Sport's broadcast of the 2018/19 Champions League Final to YouTube helped the broadcaster to reach over 11 million people, with 4.8 million tuning in through digital platforms.

GLOBAL SPORTS FANS

HOW TO GET SPORTS FANS WATCHING MORE LIVE SOCIAL VIDEO

WHAT TO FOCUS ON

- ✓ Better quality live content **34%**
- ✓ More availability of content I care about, or more choice **32%**
- ✓ More original content **30%**
- ✓ More content that supplements what I'm watching on TV **28%**
- ✓ More live streams that cover current events I want to follow **26%**
- ✓ More awareness of when a live broadcast will take place **22%**
- ✓ If live shows offered more interactive experiences **18%**

WHAT TO THINK ABOUT

- ✓ There is not enough content I care about **34%**
- ✓ Poor quality video streams **33%**
- ✓ The cost of mobile data / video uses too much of my mobile data package **28%**
- ✓ My network speed causes too much latency/buffering **27%**
- ✓ I do not enjoy the viewing experience **19%**

Cost, reliability and speed impact the demand for live sports viewing on social platforms.

New mobile technologies such as 5G and low-latency streaming may help to solve these technical hurdles, driving further growth in sports video viewing.

1/3 of fans report they would be interested in watching more original live content, which presents a huge opportunity for broadcasters and publishers to capture even larger audiences across more devices and platforms.

Removing the restrictions of where and when fans can watch will not only help broadcasters increase reach, but help smaller sports gain a larger audience by improving discoverability and making games available to anyone who wants to watch.



CONCLUSION: OUR PERSPECTIVE

For many years we have worked with the leading sports broadcasters, leagues, federations and clubs to enhance their digital video strategies and them engage audiences wherever they spend their time.

The findings of this research demonstrate how the behavior of the most passionate sports fans has changed.

Consumers are moving towards digital media more quickly than anticipated. Live sport is one of the remaining content genres that's holding back cord-cutting, but it may not remain this way for much longer.

This report shows sports fans are heavily influenced by the entertainment industry. The growth of online streaming platforms such as Netflix has changed the way we watch TV forever.

Linear TV broadcasters aim to compete with OTT and streaming by offering their content online via mobile apps and catch-up services. Many broadcasters now offer the option to watch live online, too. Streaming has become a baseline expectation for sports fans.

Consumers want this flexibility. Many pay-TV subscribers watch most often on smartphones, tablets and laptops or desktops. They're still paying for costly TV subscriptions, yet opt to watch on smaller screens. Sports fans do prefer watching on TV more than the global average, but not by much.

We've also seen a willingness from consumers to pay for multiple services. The myth that consumers need all their content in one place is just that, a myth. Sports fans have high prosperity to pay for TV and digital media. The demands on their wallets and the competition has increased dramatically.

The growth of new players in the OTT sports market, such as DAZN across Europe, ESPN+ in the US, or Kayo Sports in Australia, signals that this trend will continue.

What does the ideal scenario look like for sports fans? It could be a shift to only paying for the content you want, when you want it, on the platform you choose to consume it.

OTT offerings support this type of flexibility at a price point that suits consumers. Building a customer base through social video is highly effective, and a useful tool for promoting new services and offering additional value to customers.

The future of sports video is the internet, it's now about who makes it there first.

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