

Sports Around the World

Examining how digital consumers around the world engage with sports, and the opportunities for sports brands and marketers

INSIGHT REPORT 2018

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Introduction

GlobalWebIndex Insight reports take a deep-dive into the crucial topics of the industry. In this report, we focus on the world of sport throughout Asia Pacific (APAC), Europe, Latin America (LatAm), North America and the Middle East and Africa (MEA). We will examine how the relationship with sport differs by region, and the potential to reach fans through second-screening and sponsorship.

This report explores:

- **Engagement with Sports** – which sports and sporting leagues are the most popular around the world, and which demographics are most likely to watch sport online?
- **Sports Viewing: TV vs Online** – what role does televised sport have in a world where media consumption has increasingly shifted online?
- **The Relationship Between Sports and Social Media** – how have sports and social streaming integrated over the past year, and do sports fans see an appeal in watching sports on social networks?
- **Sports Brands and Commerce** – how many people are buying sports clothing/equipment and which brands are the most popular?
- **Case Studies in Sports Sponsorship** – what are the opportunities for Fortnite, A-B inBev and Chevrolet with their sponsorships of sporting leagues and teams?

Key Insights

85% of internet users say they regularly watch at least one sport online or on TV. Sport is particularly popular in Latin America, where 90% of the internet population report watching one or more sports online, driving up global averages. In other regions, at least 3 out of 4 internet users also exhibit this behavior.

For most frequently watched sports, soccer takes the top spot, with a massive **25 point lead over swimming**, the second most watched sport. With the exception of North America, **soccer claims the top spot in each of the regions. 33 out of the 40 markets we surveyed cite it as their most-followed sport.**

Soccer might be the most popular sport to watch globally, **but only a quarter of internet users say they regularly play it.** In Latin America, the Middle East, and African markets, however, this figure jumps to approximately 40%.

Among the sporting leagues and events globally, **the FIFA World Cup has the biggest reach, drawing in over half of internet users around the world as viewers.** The only real challenger to soccer competitions are the Olympic Games. Both the Summer and Winter Games claim a spot in the top three most-watched global sports.

There's no doubting that TV behaviors have changed and are continuing to change. **Time spent watching online TV continues to increase, and the youngest consumers, Gen Z, are spending notably less time watching broadcast TV than older consumers.**

Through their mobiles, sports fans are choosing to keep up with scores and highlights whenever and wherever they please. **In two regions - APAC and MEA - watching sports coverage on mobile has actually overtaken watching on PCs/laptops, with other global regions not far behind.**

A fifth of digital consumers say they use social media to watch or follow sports events. Among sports fans, this rises to nearly two-fifths. Across the regions, this behavior peaks in the Middle East and Africa, where a quarter are following or watching sports on social media.

Sport Around the World

Engagement with Sports

Sports Viewing

Soccer dominates globally

 Argentina	Soccer	 Netherlands	Soccer
 Australia	Soccer	 New Zealand	Rugby
 Austria	Swimming	 Philippines	Basketball
 Belgium	Soccer	 Poland	Soccer
 Brazil	Soccer	 Portugal	Soccer
 Canada	Ice Hockey	 Russia	Soccer
 China	Soccer	 Saudi Arabia	Soccer
 Colombia	Soccer	 Singapore	Soccer
 Denmark	Soccer	 South Africa	Soccer
 Egypt	Soccer	 South Korea	Soccer
 France	Soccer	 Spain	Soccer
 Germany	Soccer	 Sweden	Soccer
 Hong Kong	Soccer	 Switzerland	Soccer
 India	Cricket	 Taiwan	Badminton
 Indonesia	Soccer	 Thailand	Soccer
 Ireland	Soccer	 Turkey	Soccer
 Italy	Soccer	 UAE	Soccer
 Japan	Soccer	 UK	Soccer
 Malaysia	Badminton	 USA	American Football
 Mexico	Soccer	 Vietnam	Soccer

Globally, 1 in 3 internet users say that watching sport is an interest of theirs – a sentiment that is most pronounced among men across all age groups. But if we focus on those who report watching one or more sports online or on TV, it is clear that this overall behavior is commonplace – **85% of users claim to do so.**

This is a figure which remains consistently high by age, with a slight peak among 16-34 year-olds. By gender, we see an expected skew towards males (90%), but even among women the figure is quite high, with 79% watching at least one sport. Across the regions, all have at least three-quarters that watch at least one sport, with Latin America in particular having an impressive 90% of the population doing so. **Latin America also contains a near 50/50 split between men and women watching sport.**

There are regional differences to understand when segmenting sports viewership by age groups. While Europe and North America have consistent figures across all age groups of sports viewers, **Asia Pacific, Latin America and Middle East/Africa show a large skew towards younger demographics and a sharp drop off for 45-64s.**



Question: Which of the following sports/activities do you play, watch on TV, watch online or watch live in person?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sports Viewing

Global sports viewing | By gender



Male **58%** 42% Female



Male **56%** 44% Female



Male **51%** 49% Female



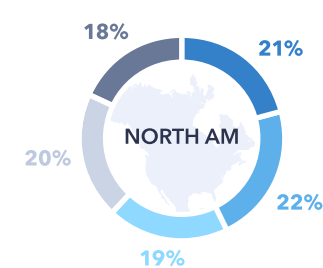
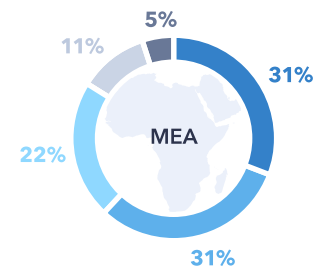
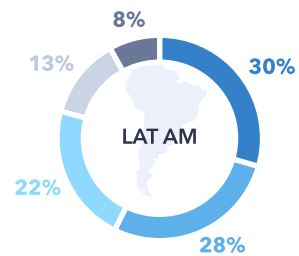
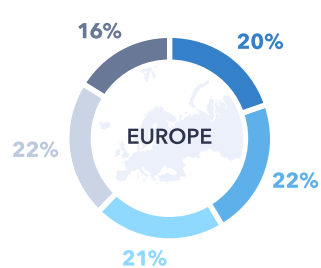
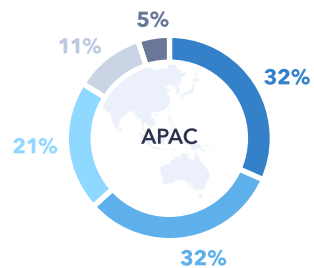
Male **61%** 39% Female



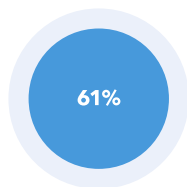
Male **53%** 47% Female

Global sports viewing | By age

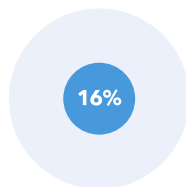
● 16-24 ● 25-34 ● 35-44 ● 45-54 ● 55-64



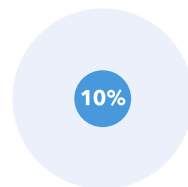
Global sports viewing | By world region



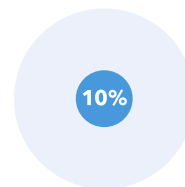
APAC



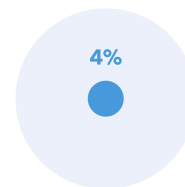
EUROPE



LAT AM



NORTH AM



MEA



Question: Which of the following sports/activities do you play, watch on TV, watch online or watch live in person?
Source: GlobalWebIndex Q3 2018 **Base:** 76,837 respondents watching at least one sport on TV or online

Top Sports Watched

Top sports globally

 Soccer	56%	 Cricket	12%
 Swimming	31%	 Baseball	11%
 Basketball	29%	 American football	11%
 Tennis	24%	 Golf	10%
 Cycling	23%	 Long-distance running	10%
 Motor sports	21%	 Surfing	8%
 Badminton	19%	 Ice hockey	7%
 Athletics	18%	 Horse-riding/equestrian	7%
 Boxing	18%	 Rugby	6%
 Gymnastics	18%	 Sailing	5%
 Volleyball	17%	 Triathlon	5%
 Martial arts	17%	 Rowing	5%
 Table tennis	15%	 Field hockey	3%
 Winter sports (e.g. skiing)	13%	 Squash	3%

For sports watched regularly on TV or online, **it's soccer which takes the top spot, with a 25 point lead over the second most-watched sport, swimming.**

Beyond soccer, the other most popular sports to watch are in fairly close proximity in terms of their relative popularity levels; there is only an 8 point difference between third placed basketball and sixth placed motorsports.

A love of soccer is a trend that cuts across regions, especially after the World Cup, which has helped elevate soccer's profile around the world. Aside from North America, soccer claims the top spot in each of the regions, with **33 out of the 40 markets we survey citing it as their most followed sport.**

Beyond this, we naturally see some very prominent regional and country-level differences in sports engagement. For example, **although only 12% of global digital consumers are regularly watching cricket, this rises to 71% in India.** Likewise, the figures for viewership of American football (51%) and baseball (38%) increase considerably when examining the U.S. market.

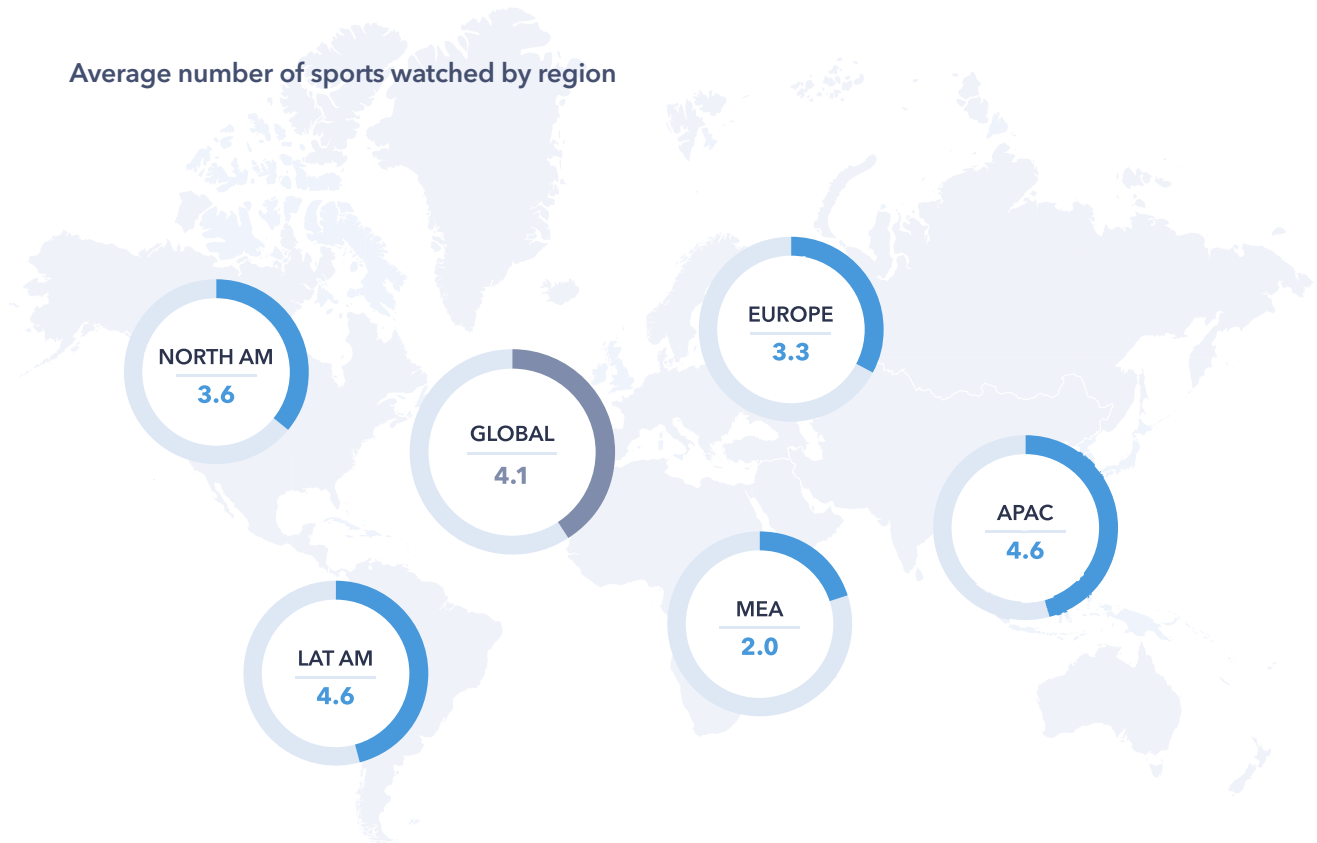


Question: Which of the following sports/activities do you play, watch on TV or watch online?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Top Sports Watched

Average number of sports watched by region



It is important to note, however, is that **consumers aren't necessarily choosing one sport over another**. Rather, they're engaging with a number of different sports - with the **average internet user watching over 4 of the 30 different sports that GlobalWebIndex tracks on TV**. There are regional differences here, too; consumers in Asia Pacific and Latin America both watch an average of nearly five sports, whereas consumers in the Middle East/Africa watch only two.

Most watched sports by region

APAC	EUROPE	LAT AM	MEA	NORTH AM
Soccer	Soccer	Soccer	Soccer	American Football
Swimming	Tennis	Volleyball	Swimming	Baseball
Basketball	Motorsports	Swimming	Tennis	Basketball



Question: Which of the following sports/activities do you play, watch on TV or watch online?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Top Sports Watched

Sports watched by country

0% 100%

	Argentina	Australia	Austria	Belgium	Brazil	Canada	China	Colombia	Denmark	Egypt	France	Germany	Hong Kong	India	Indonesia	Ireland	Italy	Japan	Malaysia	Mexico	Netherlands	New Zealand	Philippines	Poland	Portugal	Russia	Saudi Arabia	Singapore	South Africa	South Korea	Spain	Sweden	Switzerland	Taiwan	Thailand	Turkey	UAE	UK	USA	Vietnam
Am. football	7	7	11	2	11	21	4	10	9	5	5	11	5	7	4	7	5	3	6	36	5	8	12	4	5	1	4	4	5	2	5	4	6	6	10	7	6	7	51	8
Athletics	16	12	12	17	20	11	19	24	16	21	22	18	17	24	15	20	25	10	25	22	15	13	19	31	20	9	17	11	35	12	19	25	19	12	20	27	19	22	10	21
Badminton	0	4	2	2	2	4	31	1	13	2	4	3	29	32	51	4	1	5	59	2	3	5	25	4	3	2	3	26	2	8	3	3	2	20	31	5	14	4	2	32
Baseball	5	5	3	2	6	24	6	16	3	2	2	3	5	9	3	4	4	28	5	25	5	6	17	3	3	1	3	4	4	44	4	2	3	33	6	4	6	4	38	6
Basketball	28	15	7	9	29	21	41	32	6	18	14	10	29	21	29	13	19	7	20	34	9	21	70	20	20	10	20	19	13	15	33	10	7	36	24	51	33	8	35	23
Boxing	28	12	10	8	23	14	14	18	12	16	12	18	12	25	20	20	8	8	16	41	11	19	46	20	8	20	14	11	18	11	9	9	11	7	31	29	32	18	15	20
Cricket	0	29	1	1	1	4	3	1	1	2	1	1	2	71	2	7	1	0	3	1	2	21	1	1	2	0	4	3	43	1	1	2	1	1	3	2	35	15	2	2
Cycling	12	12	16	27	19	11	28	57	26	19	22	14	24	32	32	18	22	4	26	20	27	13	19	21	23	6	11	14	21	6	25	11	15	20	30	32	19	18	10	33
Soccer	67	40	52	52	76	34	53	75	46	79	50	58	54	62	75	54	62	31	63	72	51	27	45	69	72	50	67	49	60	59	65	51	55	20	72	76	64	54	31	79
Golf	7	12	5	4	7	14	12	8	7	6	4	5	9	11	5	20	6	9	10	8	6	12	10	4	5	1	5	10	17	17	5	11	5	8	14	9	9	14	16	11
Gymnastics	17	11	5	10	29	12	21	27	8	12	11	4	26	20	17	16	15	8	23	31	8	12	21	12	13	18	8	14	23	10	16	8	8	16	18	17	13	13	18	14
Ice hockey	3	5	12	4	5	42	4	4	9	3	4	12	5	6	2	4	4	1	5	6	6	5	5	9	5	26	3	4	5	2	3	33	23	3	4	6	2	4	21	4
Martial arts	18	10	10	8	27	13	14	19	7	18	10	10	10	21	27	13	8	10	26	24	11	12	35	19	11	14	13	16	16	8	9	9	9	11	25	27	20	9	12	29
Motor sports	23	18	26	14	26	15	16	23	20	15	15	24	17	29	43	17	33	9	31	22	25	22	25	17	26	10	16	19	33	10	29	15	21	14	27	30	26	24	14	25
Rugby	21	23	3	6	4	5	4	5	2	2	24	3	6	6	2	40	10	6	8	3	6	45	5	4	6	2	3	5	48	1	5	3	6	3	4	4	5	23	3	5
Surfing	5	9	3	4	15	5	11	4	2	11	3	3	8	12	6	6	3	2	7	6	3	8	13	3	8	2	6	5	11	3	4	3	5	6	6	7	7	4	6	4
Swimming	18	23	14	11	35	16	42	33	14	36	20	16	38	33	29	21	29	10	36	32	16	14	37	21	18	15	30	32	32	18	21	16	14	23	31	43	29	17	16	41
Table tennis	3	4	4	3	7	3	30	7	4	9	4	6	20	16	10	4	4	8	12	4	3	6	14	8	5	3	8	14	5	9	4	6	3	12	13	15	10	4	3	14
Tennis	41	31	30	27	20	17	24	31	19	26	29	17	21	37	17	28	29	15	19	23	22	21	25	25	23	11	21	19	33	13	38	15	34	20	29	33	27	30	16	25
Volleyball	17	4	7	7	48	7	17	18	3	11	6	7	25	15	19	4	22	8	13	19	9	5	45	41	11	12	13	8	6	11	6	5	7	13	50	36	15	3	8	28
Winter sports	9	11	44	12	14	16	13	9	13	8	17	22	12	9	5	11	20	8	9	16	13	13	9	34	8	25	7	7	13	18	9	24	33	8	7	21	7	13	14	9




























Question: Which of the following sports/activities do you play, watch on TV or watch online?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Participation in Sports

Most played sports by region

APAC	EUROPE	LAT AM	MEA	NORTH AM
 Badminton 44%	 Swimming 26%	 Soccer 37%	 Soccer 41%	 Swimming 32%
 Swimming 39%	 Soccer 21%	 Swimming 20%	 Swimming 32%	 Exercise classes 18%
 Cycling 33%	 Cycling 14%	 Volleyball 19%	 Cycling 16%	 Basketball 17%
 Soccer 27%	 Exercise classes 13%	 Exercise classes 18%	 Exercise classes 15%	 Cycling 14%
 Table tennis 26%	 Table tennis 12%	 Basketball 16%	 Tennis 13%	 Soccer 13%

Globally, 38% of internet users report that they are interested in playing sport, with figures rising among 16-34 males. Women are quite active through other forms of physical exercise – 42% of women exercise at least 2-3 times a week, and a fifth of women work out most days of the week.

Regionally, there are differences in sports participation, as well. While Europe, APAC, and MEA are approximately on par with 40% of consumers in these markets playing sport, Latin America overindexes – **1 in 2 respondents from Latin America say they're interested in playing sport.** In contrast, this figure drops to below 1 in 3 in North America. However, North America boasts

the highest figures for consumers who exercise at least 2-3 times per week (52%) – indicating that physical activity is likely more oriented toward gyms, running, exercise classes, etc.

Soccer might be the most popular sport to watch globally, but **only a quarter of internet users say they regularly play it. This figure jumps up to approximately 40% in Latin America and Middle East and Africa markets.** Soccer places third globally, with swimming and – perhaps surprisingly – badminton taking the top two spots. Badminton is particularly popular in Asia Pacific, with a striking 44% of the population actively playing it.

While it's expected that American football is most popular in North America, **it is the eleventh most played sport in this region at only 8% behind golf (12%), soccer (13%), baseball (11%) and volleyball (11%).** Swimming (17%) is the most popular participation sport in the North American region, followed by exercise classes (e.g. yoga, zumba, spin; 18%) and basketball (17%).

1 in 2 respondents from Latin America say they're interested in playing sport



Question: Which of these sports/sporting activities do you regularly play or take part in?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sporting Leagues and Competitions

The only real challenger to soccer are the Olympic Games

The only real challenger to soccer as a top global sport are the Olympic Games, with both the Summer and Winter competitions claiming a spot in the top three most-watched sports. Among the soccer leagues/competitions, the **FIFA World Cup has the biggest reach, drawing in over half of internet users around the world**. The UEFA Champions League, Premier League and La Liga also all post viewership figures between the 20-30% levels.

The NBA also boasts an impressive draw, with approximately 30% of respondents in APAC, Latin America and North America following this league.

Basketball is a sport that provides broad appeal across all age ranges in each global region, but is particularly popular among 16-34 year-olds.

Although the NBA does well in North America, the sports landscape in this region is slightly at odds with the global picture; **the NFL holds a 16 point lead over the NBA. Other home leagues/competitions such as Major League Baseball outscore global sports events such as the FIFA World Cup**. There is little to suggest that soccer leagues, which perform so well in the other regions, are growing in popularity in North America. The UEFA Champions League places 18th (9%), Major League Soccer places 21st (8%) and the Premier League places 22nd (8%) in terms of their overall viewership figures.

TREND IN ACTION

ENGAGEMENT
WITH SPORTS

11



















































The growing shadow of a European Super League



According to documents released by the popular German news site *Der Spiegel*, 11 elite European teams (and five additional guest teams) could break off and form their own separate 'Super League' by 2021, independent of UEFA. Participants of the Super League could be granted much more significant financial rewards if they were allowed to play with the most superior clubs in the world on a more regular basis, and the league would be able to compete with the NFL and NBA for unprecedented television rights deals. Despite these advantages for individual teams, there has been considerable opposition to the idea; UEFA President Aleksander Ceferin and chairman of the European Club Association Andrea Agnelli have both claimed recently that a Super League is "out of the question".

Sporting Leagues and Competitions

Top 10 most watched leagues around the world

APAC	EUROPE	LAT AM	MEA	NORTH AM
 FIFA World Cup ¹ 46%	 FIFA World Cup ¹ 53%	 FIFA World Cup ¹ 72%	 FIFA World Cup ¹ 66%	 Summer Olympics ¹ 42%
 Summer Olympics ¹ 36%	 Summer Olympics ¹ 44%	 Summer Olympics ¹ 53%	 UEFA Champions 33%	 NFL 41%
 Winter Olympics ¹ 24%	 Winter Olympics ¹ 39%	 Copa Libertadores 37%	 Summer Olympics ¹ 31%	 Winter Olympics ¹ 39%
 NBA 20%	 UEFA Champions 29%	 Winter Olympics ¹ 30%	 LaLiga 24%	 MLB 30%
 UEFA Champions 14%	 UEFA Europa 21%	 UEFA Champions 28%	 Premier League 23%	 FIFA World Cup ¹ 27%
 ICC World Cup ² 13%	 UEFA Euro Championship 20%	 Campeonato Brasileiro Serie A ² 22%	 UEFA Euro Championship 22%	 NBA 25%
 Tour de France 13%	 Formula 1 17%	 Formula 1 21%	 UEFA Europa 21%	 NHL 20%
 Formula 1 12%	 Wimbledon 16%	 UEFA Europa 18%	 Egyptian Premier League ² 19%	 College Football 19%
 Premier League 12%	 Tour de France 13%	 Boxing 18%	 Winter Olympics ¹ 18%	 College Basketball 14%
 Wimbledon 12%	 Premier League 13%	 UEFA Euro Championship 18%	 Wimbledon 17%	 US Open 11%

¹ Non-annualized events tend to pull in bigger crowds

² Figures may be affected by leagues that are restricted to certain markets



Question: Which of these sporting events/leagues do you regularly follow or have an interest in? Which of them do you watch regularly on broadcast TV or online?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sporting League Trends and Growth

Examining the different followings of major sports leagues on a global scale reveals interesting differences in their fanbases. In the U.S., these differences are very prominent when comparing the two most popular leagues – the NFL and the NBA.

The NFL is still followed by more American 16-24 year-olds than the NBA, but the difference is gradually decreasing, with just a four point difference between the two leagues. While NFL revenue in 2017 grew by an estimated \$900 million, or roughly 7%, Forbes reports that the most recent NBA season generated \$7.4 billion for teams - a staggering 25% growth from the year before. This suggests that the NBA is growing more than three times as fast as the NFL and will close the gap over the next decade. This is especially true when considering the intangibles of the two sports: the NBA has been propelled by a deep bench of charismatic megastars including the Lakers' LeBron James, the Rockets' James Harden and the Warriors' Steph Curry. By contrast, the NFL's biggest names – including Tom Brady and J.J Watt – arguably tend to be older or lower key. The NBA also accounts for significantly [fewer sporting injuries than the NFL](#), has been more tolerant of its players' freedom of speech, and has much stronger ties to popular culture, especially hip-hop. All these factors have combined to create a sport that lends itself to younger demographics, who are looking for sports and sports teams that share their ideals.

There are some sports competitions that tend to be popular across the globe, and some which have struggled to make an impact beyond a selected few markets. So, while the Summer and Winter Olympics and soccer competitions are generally universally popular, tournaments such as the National Hockey League (4.4%), 6 Nations (1.4%), and World Rugby Seven Series (3%) have failed to make any serious inroads beyond their "home" markets.






La Liga hoping to bring soccer to the US



Market research undertaken by the Spanish league suggested that, of the 50 million or so committed soccer fans who regularly watch the sport on TV, around 80% were fans of La Liga, with America's significant Hispanic population playing a major part of that. La Liga, forced into action by the Premier League's growing global dominance, have therefore entered a 15-year joint venture with U.S.-based media group Relevent to develop soccer in the US and bring an official La Liga match to US shores. FIFA has opposed the idea in recent weeks, saying that official league matches must be played within the territory of the respective country, to which La Liga have threatened legal action if their plan is blocked.

Women's Sport

Engagement with female sporting leagues

	APAC	EUROPE	LAT AM	MEA	NORTH AM	16-24	25-34	35-44	45-54	55-64	FEMALE	MALE
 FIFA Women's World Cup	0.93	0.94	1.78	0.73	0.89	0.93	1.04	1.03	0.99	1.04	1.02	0.99
 ICC Women's World Cup	1.59	0.11	–	0.93	–	1.48	1.17	0.79	0.53	0.28	0.61	1.34
 ICC Women's World Twenty20	1.59	0.11	–	0.93	–	1.48	1.13	0.78	0.52	0.44	0.50	1.44
 UEFA Women's Champions League	0.96	1.15	1.60	0.79	0.49	0.89	1.11	1.07	1.00	0.83	0.94	1.05
 Women's World Cup	0.27	3.36	0.32	2.53	1.39	0.58	0.72	1.03	1.61	2.11	0.79	1.19

In terms of investment and coverage, female sports remain well behind male sports, but **there are opportunities for smaller and emerging brands to sponsor women's sports and make meaningful connections with consumers**. As more viewers are drawn to women's sports, a growing number of sponsors are stepping up. Research from sports marketing agency Two Circles found attendances for women's sports in the UK had [grown 38% year-on-year since 2013](#). This year, for the first time, the number of fans attending elite women's sporting events in the UK was set to hit 682,000, a 49% increase from 2017. Broadcaster Sky reported [a peak audience of 1.1 million for the Women's World Cup cricket final](#) – more than men's Premier League matches draw on average.

Our data suggests there is a market for female sports, particularly among 16-24 year-olds. Respondents in this age bracket are 1.5x more likely to have watched or taken an interest in the ICC Women's World Cup and ICC Women's World Twenty20. The data also indicates that Latin America is ahead of the curve when it comes to watching women's sports; internet users in LatAm are 1.9x more likely to follow the FIFA Women's World Cup, and 1.6x more likely to follow the UEFA Women's Champions League. **What is particularly interesting about female sports is how the distribution landscape differs to men's sports;** while men's sport is still firmly in broadcast TV, women's sports aren't as easily found on broadcast channels. This means that for women's sports, consumers are having to go online and use alternative distribution channels – such as social media – to find them.



Question: Which of these sporting events/leagues do you regularly follow or have an interest in? Which of them do you watch regularly on broadcast TV or online?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

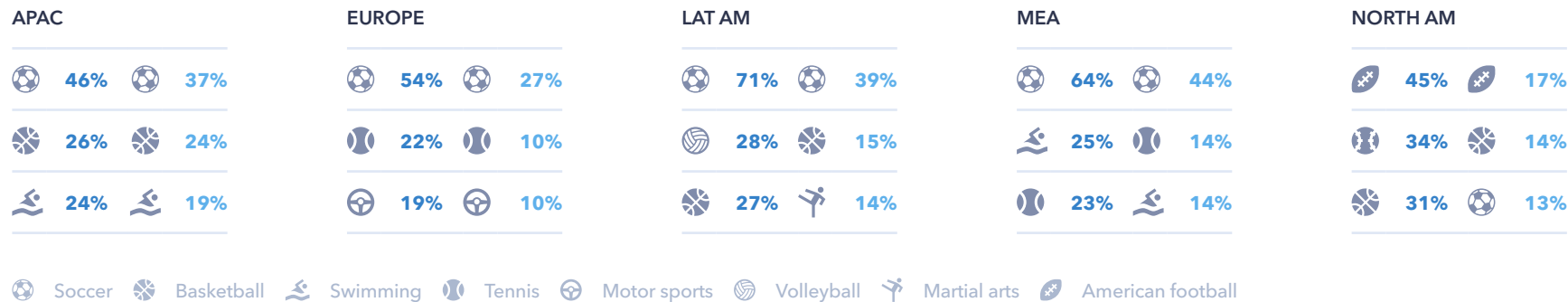
Sport Around the World

Sports Viewing: TV vs. Online

Sports Watched on TV vs. Online

Top 3 sports watched on TV and online

● On TV ● Online



In a fragmented media landscape, live sport remains one of the only types of content which viewers will make an appointment to watch. There's an excitement about watching sports live with friends on a big TV screen, while keeping up with commentary and analysis on the second-screen. But with the phenomenon of "cord-cutting" garnering more media attention, and there being an increasing opportunity to catch up with games via social media platforms such as Facebook and Twitter, is there a potential for sports viewing habits to change significantly?

There's no doubting that TV behaviors have changed and are continuing to change; time spent watching online TV continues to increase and **focusing on the youngest generation of consumers, Gen Z, reveals**

that they are spending notably less time watching broadcast TV than older consumers. At present, though, broadcast TV reigns strong. Internet users on average spend 42 minutes more watching broadcast TV compared to online TV, and on average digital consumers are watching two more sports on TV vs. online.

The age trends are quite striking: 25-34 year-olds are watching nearly three sports online, compared to 55-64 year-olds who watch one. For 16 to 24 year olds, the difference between the number of sports watched on TV and online is gradually shrinking; this age group watches 2.5 sports online and 3 sports on TV.

If we focus on the youngest consumers, Gen Z, they're spending less time watching broadcast TV than older consumers



Question: Which of the following sports/activities watch on TV or watch online?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sports Watched on TV and Online

The gap between sports watched on TV versus online is more pronounced in some regions than others. For example, respondents in Europe, Latin America and North America watch roughly double the amount of sports on broadcast TV that they watch online. In the Asia Pacific and Middle East/Africa regions, the ratio is much more balanced – **internet users in APAC are watching nearly the same number of sports, on average, across both media.**

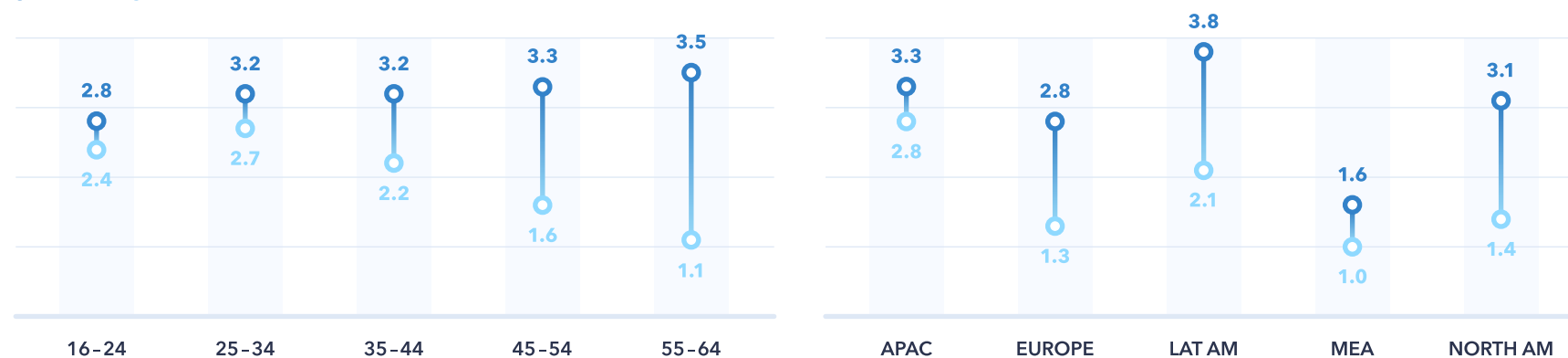
Landmark deals between technology brands and major sports competitions have helped unshackle sports distribution from free-to-air TV broadcasters and subscription broadcast TV services. The likes of Amazon, Facebook and Twitter are among the few digital disruptors with pockets deep enough to meet the high costs attached to live sports distribution. A fragmented landscape means sports fans are now faced with the choice of paying more

for separate subscriptions from traditional broadcasters and digital subscription services, or face missing out on some of the sports action. Looking ahead, **if the increasing presence of tech companies in sports broadcasting does prove successful, major leagues may look to bring in more incumbent online distribution platforms into the mix.** This success could also place a higher value on broadcast packages, even if it means more subscriptions for consumers to keep up with every event.

The move to online sports has enabled previously less dominant sports to reach a far greater crowd

Average number of sports watched: online vs. on TV

● On TV ● Online



Question: Which of the following sports/activities watch on TV or watch online?
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

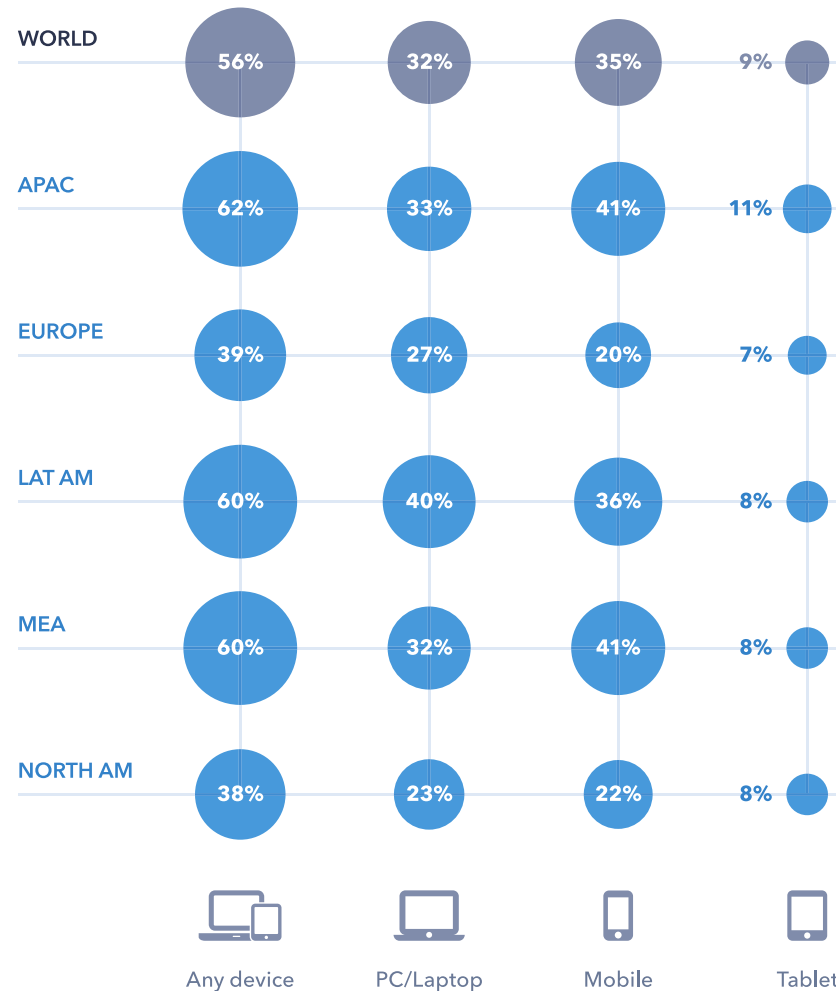
Online Sports Viewing by Device

There's no doubt that TV trumps other devices when it comes to sport, but modes and habits of consumption are shifting. People are still watching sport, but they're streaming it on laptops, mobiles and tablets, and are multi-screening – catching highlights on social media and augmenting their viewing through on-demand channels.

In fact, 56% of internet users globally watch sports coverage or highlights online across various devices each month. And the multi-device approach is particularly apparent: 32% watch highlights on their laptop and 35% on their mobile – with a crossover between the two. It's natural that PCs/laptops are an important go-to for sports coverage and highlights given their larger screen sizes and greater picture clarity, but with the on-the-go and on-demand access that mobiles offer, watching highlights on mobile has never been easier. Through their mobiles, sports fans are choosing to keep up with scores and highlights whenever and wherever they please – whether that's checking Twitter for the latest scores and commentary, or watching the best moments of the game on a sports broadcasters' website. **In two regions – APAC and MEA – sports viewing on mobile has actually overtaken PCs/laptops, and the other regions are not far behind.**

Tablets have made much less of an impact in this space. Whether for reasons of cost, interest, or just general need, tablets have failed to reach the ownership heights that many predicted. Although the larger screens of tablets make them well suited for TV viewing, the increasing size of mobile screens means there's little need for a larger, less portable device.

Online sports viewing by device

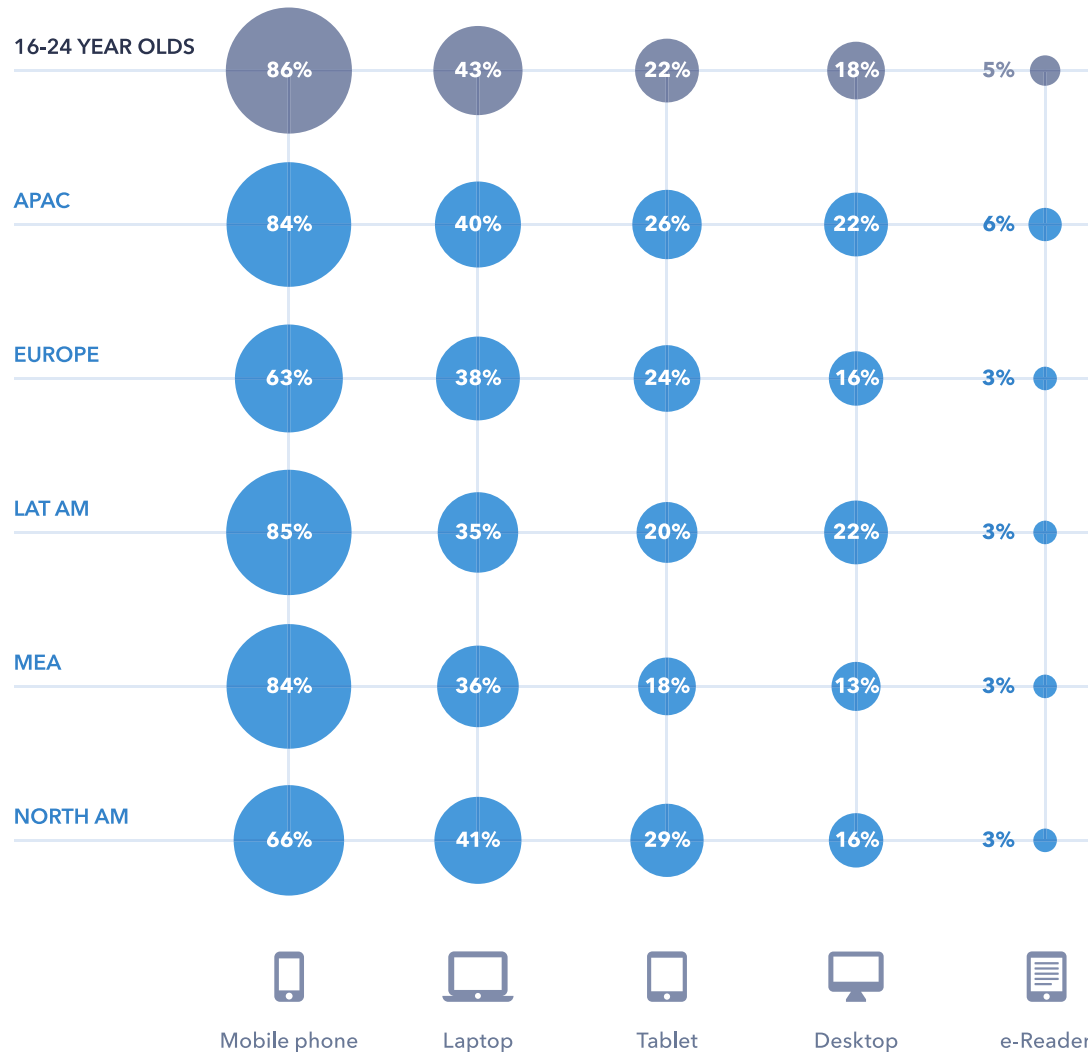


Question: In the past month, which of the following things have you done on the internet via any device?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Second Screening

Second screening devices



Another challenge to traditional TV sets is the second screen, with broadcast viewers not paying as close attention during scheduled programming. Whether it's looking to see what friends are saying about a game, what pundits are predicting, or placing a bet on the match, the second screen has a big role to play in sports.

90% of sports fans say they use another device as they watch TV, with mobiles as the clear preferred option for doing so (79%). This is largely due to the number that are social networking as they watch TV. When we ask sports fans what they tend to do on the second screen, **over half cite using social media and chatting to friends as their top activities** – a finding that is consistent across all world regions apart from North America. Sports fans in North America are most likely to say they read their emails whilst second-screening. Evidently, most sports fans are looking to connect with other fans and check out friends' reactions to matches in real time.






Question: In the past month, which of the following things have you done on the internet via any device?

Source: GlobalWebIndex Q3 2018 **Base:** 39,126 Sports Fans

Second Screening

Second screening activities | By region




	APAC	EUROPE	LAT AM	MEA	NORTH AM
 Chat to/message friends	55%	43%	59%	51%	41%
 Use social media	51%	45%	67%	56%	50%
 Read my emails	37%	43%	47%	40%	53%

Twitter has a major opportunity to take advantage of the second-screening phenomenon for sports. Live-tweeting and reactions from sports broadcasters and journalists mean that Twitter is a natural go-to for live sports commentary and updates. Over 1 in 4 sports fans have engaged with or contributed to Twitter in the past month via any device, making them 23% more likely than the typical internet user. Sports fans are also 83% more likely to have

recently tweeted about a sports event or match they were watching in the last month, so the desire to be part of the conversation is obvious.

Second-screening could one day create more opportunities for advertisers, but that's not to say that watchers of sports will necessarily be receptive to ads or looking for products to buy during a big game. While they're more likely to be looking for products to buy than

Second screening activities | 16-24s

	IDX
 Chat to/message friends	59% 1.29
 Use social media	58% 1.31
 Read my emails	43% 1.41

the average internet user (Index 1.19), it's still only 3 in 10 that do so, and this figure can drop as low as 19% in the Middle East and Africa. **The key for brands is to generate engaging content related to the big screen, and create the right conversations that will be appreciated by sports viewers** – without getting in the way of the commentary and news they're after.



Question: In the past month, which of the following things have you done on the internet via any device?

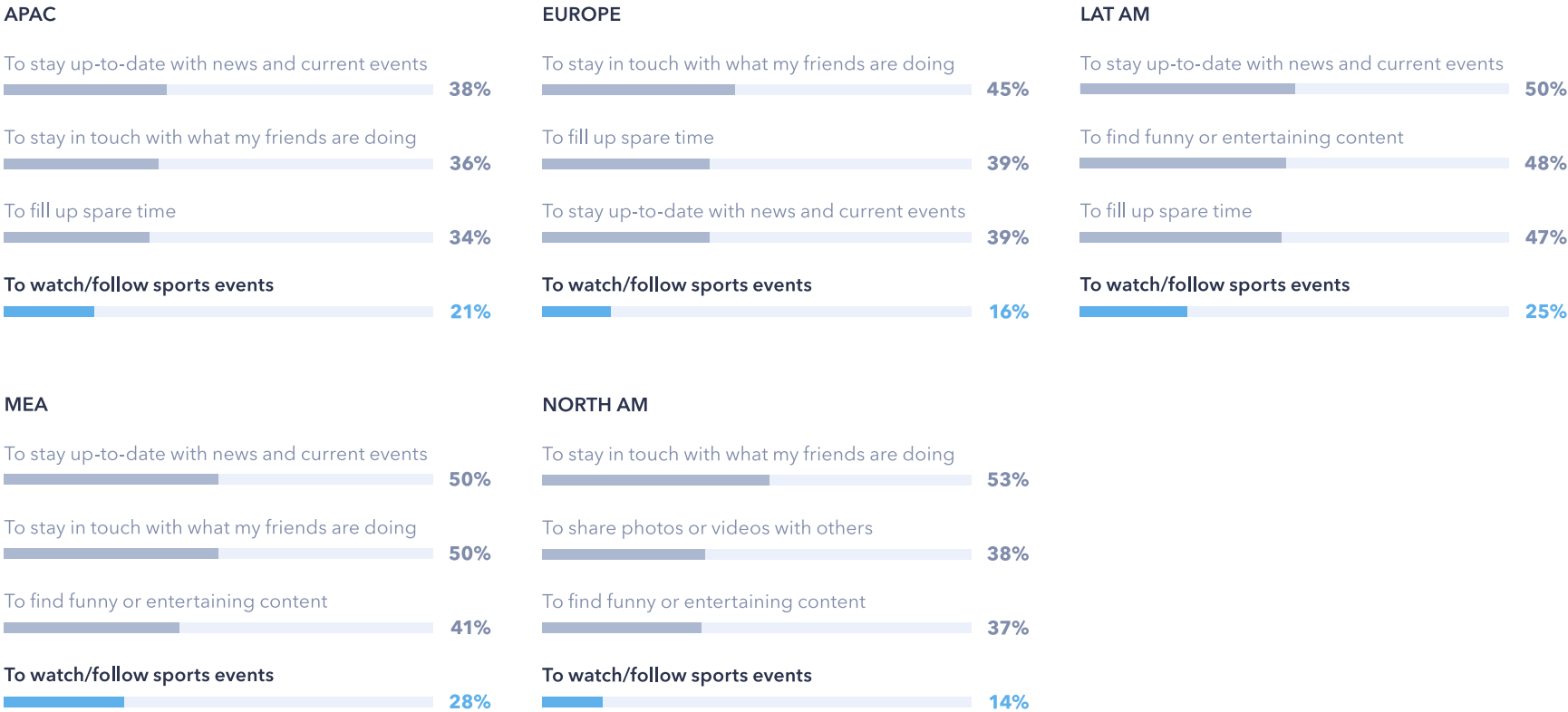
Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sport Around the World

The Relationship Between Sports & Social Media

Watching Sports on Social Media

Where sport ranks among main reasons for using social media



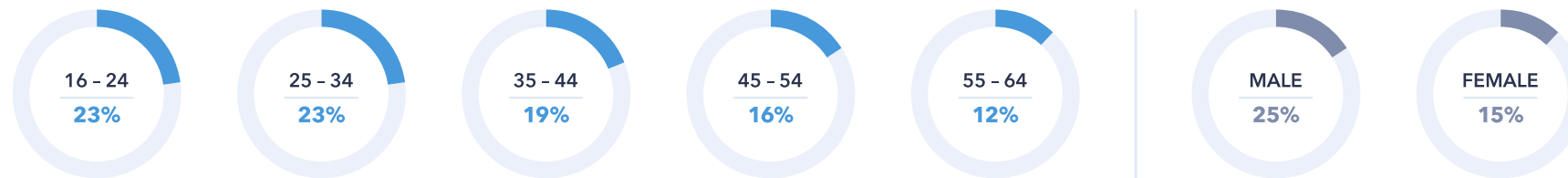
Sports broadcasts have been among the first to jump on the social streaming bandwagon. The sports industry, in particular, has had to become less reliant on millions paying to watch it on the big TV screen, and instead offers fans other ways to keep up with the action – namely by providing content and highlights across social media. This is particularly important in trying to reach younger sports fans.



Question: What are your main reasons for using social media?
Source: GlobalWebIndex
Q3 2018 **Base:** 113,932
Internet Users aged 16-64

Watching Sports on Social Media

Demographics of those following sports on social media



Last year, Facebook began streaming various sports on the social media site, including MLB and college football games. This spring, the social media giant began a partnership with Fox Sports to broadcast one BIG3 basketball game every Friday for the rest of the summer. Even more recently, Facebook gained the rights for the English Premier League in several Southeast Asian countries and Spanish La Liga rights in India, outbidding BeIn Sports and Fox Sports. YouTube have also been aggressive in leading the cord-cutting movement; BT Sport once again live-streamed both the UEFA Europa League and UEFA Champions League finals live on the platform.

In the near future, consumers will probably just pick from a range of over the top (OTT) services rather than pay for sports they don't want. All four major US sports leagues have such a platform, while the Football League in the UK also has ambitious plans alongside its more conventional deals with Sky Sports.

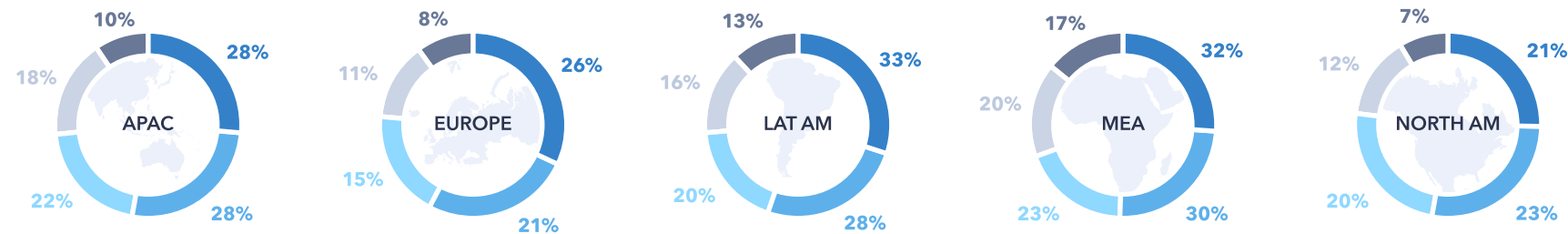
Just under a fifth of digital consumers say they use social media to watch or follow sports events, rising to nearly two-fifths if we focus on sports fans. 16-34 year-olds are the most enthusiastic about using social networks for this purpose, and men are considerably ahead of women.



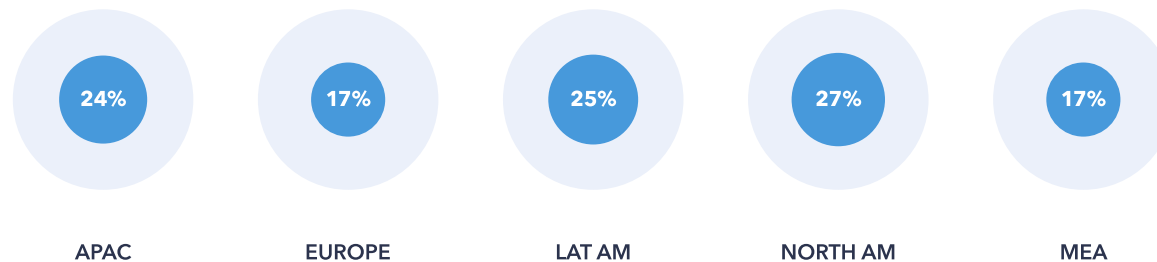
Following Sports Stars

% of internet users who follow sports stars on social media

● 16-24 ● 25-34 ● 35-44 ● 45-54 ● 55-64



As well as a place for watching sports, social media has emerged as a way of keeping up with favorite celebrities – including sports stars. Globally, over a fifth of internet consumers follow sports stars, and this rises to 40% among sports fans.



There's fairly wide variation across the demographic groups. In particular we see that age has a strong impact across all regions: **16-34 year-olds are roughly 3x as likely as their 55-64 year old counterparts to be following sports stars** – the result of younger internet users being more frequent social networkers. This disparity is seen in all regions apart from the Middle East and Africa, where **55-64 year-olds here are 85% more likely to follow sport stars on social media than other 55-64 internet users**.

At present, 18% of sports fans say they find out about new brands or products via celebrity endorsements, making them 24% more likely to do so than the average internet user. The differences by age that make this form of brand promotion particularly appealing; over a fifth of 16-34 year-olds are impacted by influencer marketing.



Question: Who do you follow on social media?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sport Around the World

Sports Brands & Commerce

Sports Clothing and Sports Brands

Sports clothing purchased in the last month

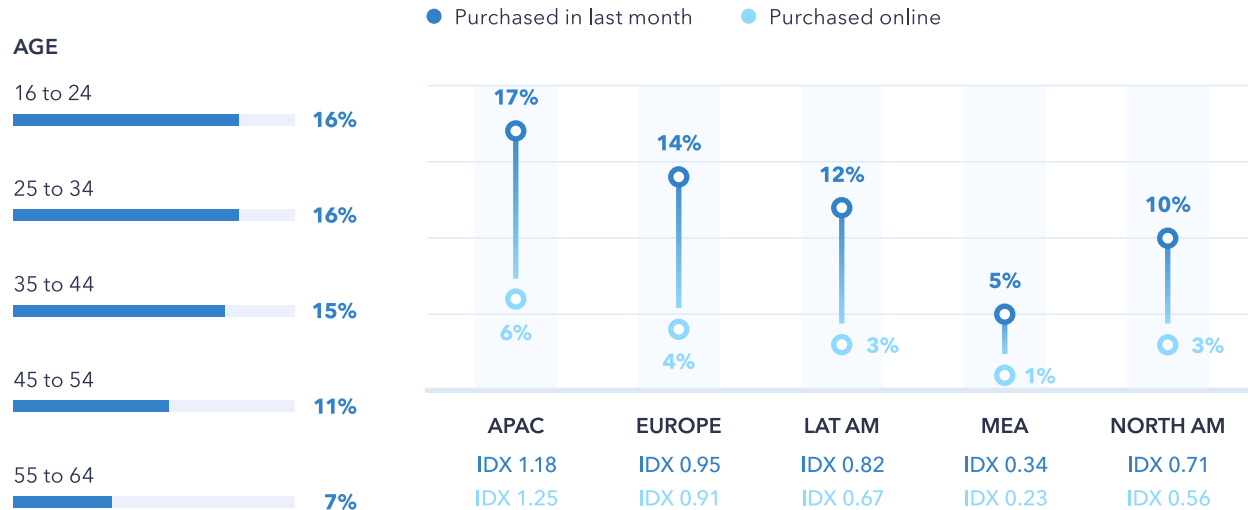
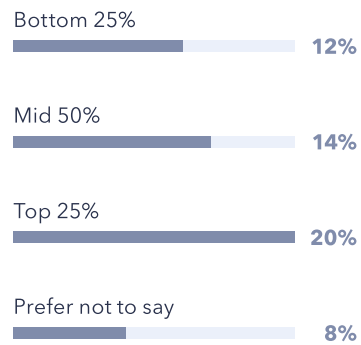


figure drops to 7% in the MEA. What is consistent across all regions, however, is that Nike and Adidas are in a league of their own, taking the top two spots in each region.

The third most popular sports brand isn't as clearcut, and differs from region to region: New Balance in APAC, Puma in Europe and the Middle East and Africa, Converse in Latin America, and Under Armour in North America.

INCOME GROUP



Globally, 14% of internet users have bought sports clothing or equipment in the last month, though this rises to 22% when we focus on sports fans. Across the age groups, **over a fifth of all internet consumers between 16 and 44 have purchased sports clothing or equipment in the past month.** The income-based differences are perhaps the most interesting here, with as many as 1 in 4 from the top quartile purchasing sports clothing or equipment in the past month.

Regionally, there are also quite stark differences in purchasing sports equipment. While a quarter of respondents in the APAC region say they have bought sports clothing in the past month, this



Question: Which of these products have you or your household purchased in the last month? Which of these items did you purchase online? Which of these items did you research online before purchasing?

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Sports Clothing and Sports Brands

Sports clothing/equipment purchased in the last month by sports brand



TREND IN ACTION

SPORTS BRANDS
& COMMERCE

27

Real Madrid deal with Adidas



Spanish soccer giant Real Madrid is set to sign off on a record ten-year \$1.25 billion renewal with German sportswear brand Adidas. The agreement, which would run from 2020 until 2030 and represent the most expensive kit deal in soccer, would see Adidas pay more than double the annual \$60 million it commits under its current contract with the La Liga club. If confirmed, the deal would see Real Madrid surpass Barcelona's kit deal with US sportswear giant Nike, which pays the La Liga champions only \$95 million each year. The deal would also provide a major boost to Madrid's finances at a time when the club is trying to find ways to fund a multi-million redevelopment of its Santiago Bernabéu stadium.



Question: Which of these products have you or your household purchased in the last month? Which of these items did you purchase online? Which of these items did you research online before purchasing? // Have you bought products from any of these sports brands? This could include clothing, shoes, sporting equipment or any other accessories.

Source: GlobalWebIndex Q3 2018 **Base:** 113,932 Internet Users aged 16-64

Most Popular Sports Teams Around the World

Football | Any interest

APAC	EUROPE	LAT AM	MEA	NORTH AM
Real Madrid 26%	Real Madrid 19%	FC Barcelona 42%	Liverpool 41%	Manchester United 10%
Manchester United 25%	FC Barcelona 18%	Real Madrid 41%	Real Madrid 35%	Real Madrid 8%
FC Barcelona 22%	Juventus 16%	Juventus 31%	FC Barcelona 32%	FC Barcelona 7%

Basketball | Most followed

APAC	EUROPE	LAT AM	MEA	NORTH AM
Houston Rockets 16%	Los Angeles Lakers 5%	Chicago Bulls 10%	Los Angeles Lakers 5%	Golden State Warriors 6%
Los Angeles Lakers 14%	Chicago Bulls 4%	Los Angeles Lakers 10%	Golden State Warriors 4%	Los Angeles Lakers 6%
Golden State Warriors 12%	Golden State Warriors 3%	Golden State Warriors 5%	LA Clippers 3%	Boston Celtics 5%

American football | Most followed

APAC	EUROPE	LAT AM	MEA	NORTH AM
New York Giants 2%	New York Jets 2%	New England Patriots 5%	Los Angeles Rams 7%	New England Patriots 7%
New England Patriots 2%	New England Patriots 1%	Dallas Cowboys 5%	Los Angeles Chargers 4%	Dallas Cowboys 7%
Miami Dolphins 2%	Miami Dolphins 1%	Denver Broncos 3%	New York Jets 4%	Green Bay Packers 5%



Question: Do you support, follow or have an interest in any of these teams?

Source: GlobalWebIndex
Q3 2018 **Base:** 113,932
Internet Users aged 16-64

Case Studies in Sports Sponsorship Around the World

A-B InBev and the NBA

Sport has gone from a passive spectator sport to a participative one – fans want to be closer to the action, to the athletes and to see the most revealing camera angles. Sponsoring a sports property can be one way to appeal to fans in this way and an deepen relationships far beyond a logo impression; it can provide fans with access to players, managers and behind-the-scenes action. It's led to some great successes for some brands, and we explore a few of these partnerships here.



21% IDX 1.83



14% IDX 1.44



8% IDX 1.51



7% IDX 1.60



7% IDX 1.87

A-B InBev is one of the NBA's longest standing partnerships, and the company now uses two brands – Bud Light and Budweiser – in NBA activations. 2015's renewal of the deal saw the production of digital videos hosted on NBA-owned platforms and shared on A-B InBev properties, as well as enhanced packaging rights which allow it to feature NBA and team logos on cans, bottles, and in campaigns. AB inBev has struck new deals recently with the players unions of the NBA to use players in its marketing campaigns. This deal has likely been aided by the fact that the union last year took back control of sponsorship negotiations involving collective image rights. A-B inBev have also hit the headlines for rolling out a new sponsorship model, built on incentives for performance on the field or pitch, as well as off of it. Every A-B inBev sponsor deal going forward, whether with a team or a league, will include a base compensation amount, plus metrics that trigger larger investments by the company.

This long relationship seems to have had an impact on NBA Fans' beer/lager preferences. When we ask them which brands they drink each month, it's Budweiser that comes out top. 21% of fans are drinking the brand on a monthly basis, giving it a seven point lead over second-placed Heineken. It's also promising that Bud Light makes the top five brands, with NBA fans being 1.87x more likely to have drunk Bud Light in the last month.



Question: When did you last drink these alcohol brands?
Source: GlobalWebIndex
Q3 2018 **Base:** 14,830 NBA Fans

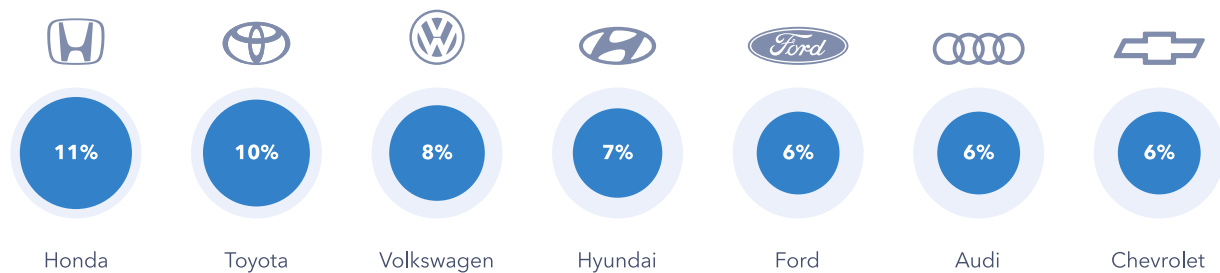
Case Studies in Sports Sponsorship Around the World

Chevrolet and Manchester United

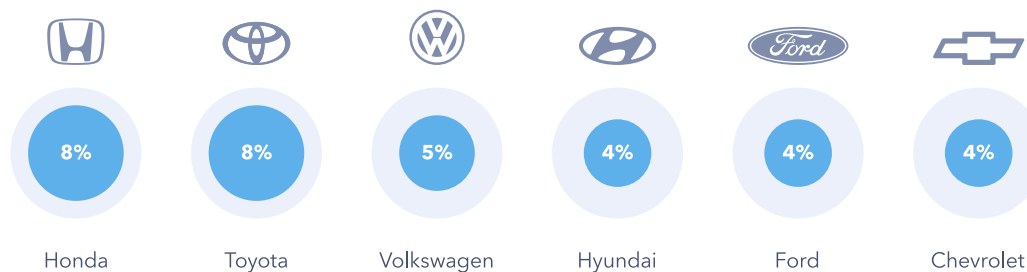
Manchester United are consistently named as the top club in Europe's top leagues in terms of sponsorship revenue, generating \$309 million per year from 68 commercial deals. United's shirt sponsor deal with Chevrolet is the car brand's only soccer deal – yet the \$69 million per-year agreement leaves the brand seventh in the list of biggest brand investments in sports sponsorship deals.

There's potential, however, for Chevrolet to make more of an impact among Manchester United fans. Among this group, the car brand comes seventh in terms of current ownership, and just sixth for brand advocacy. Since Manchester United fans are 42% more likely than the average internet user to be planning to buy a car in the next 3-6 months, having a better brand-consumer relationship with these fans is paramount for the car brand.

Current ownership



Planning to purchase



Question: Which of these products have you or your household purchased in the last 3-6 months? Which of these items did you purchase online? Which of these items did you research online before purchasing? Which of these items are you/your household thinking about purchasing in the next 3-6 months?

Source: GlobalWebIndex
Q3 2018 **Base:** 5593
Manchester United Fans

All figures in this report are drawn from **GlobalWebIndex's online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

OUR RESEARCH

Each year, GlobalWebIndex interviews over 400,000 internet users aged 16-64. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers.** Each respondent who takes a GlobalWebIndex survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

OUR QUOTAS

To ensure that **our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education. To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the “weight” of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

Please note that the sample sizes presented in the charts throughout this report may differ as some will include both mobile and PC/laptop/tablet respondents and others will include only respondents who completed GlobalWebIndex's Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this [document](#).

GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from GlobalWebIndex's Q3 2018 wave of research across 40 countries, with a global sample of 93,803 respondents

	TOTAL		TOTAL
Argentina	1559	Netherlands	1279
Australia	2282	New Zealand	1275
Austria	1280	Philippines	1577
Belgium	1266	Poland	1816
Brazil	2345	Portugal	1284
Canada	2268	Russia	2279
China	15361	Saudi Arabia	1487
Colombia	1301	Singapore	2496
Denmark	1334	South Africa	1528
Egypt	1771	South Korea	1270
France	3323	Spain	2784
Germany	2846	Sweden	1274
Hong Kong	1766	Switzerland	1261
India	4138	Taiwan	1796
Indonesia	1788	Thailand	1538
Ireland	1247	Turkey	1577
Italy	2807	UAE	1768
Japan	1804	UK	7709
Malaysia	1556	USA	15637
Mexico	2605	Vietnam	1618

Notes on Methodology: Internet Penetration Rates

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ACROSS GLOBALWEBINDEX'S MARKETS

GlobalWebIndex's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2018. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically.

Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

Internet Penetration Rates

GlobalWebIndex's forecasts for 2018 based on 2016 ITU data

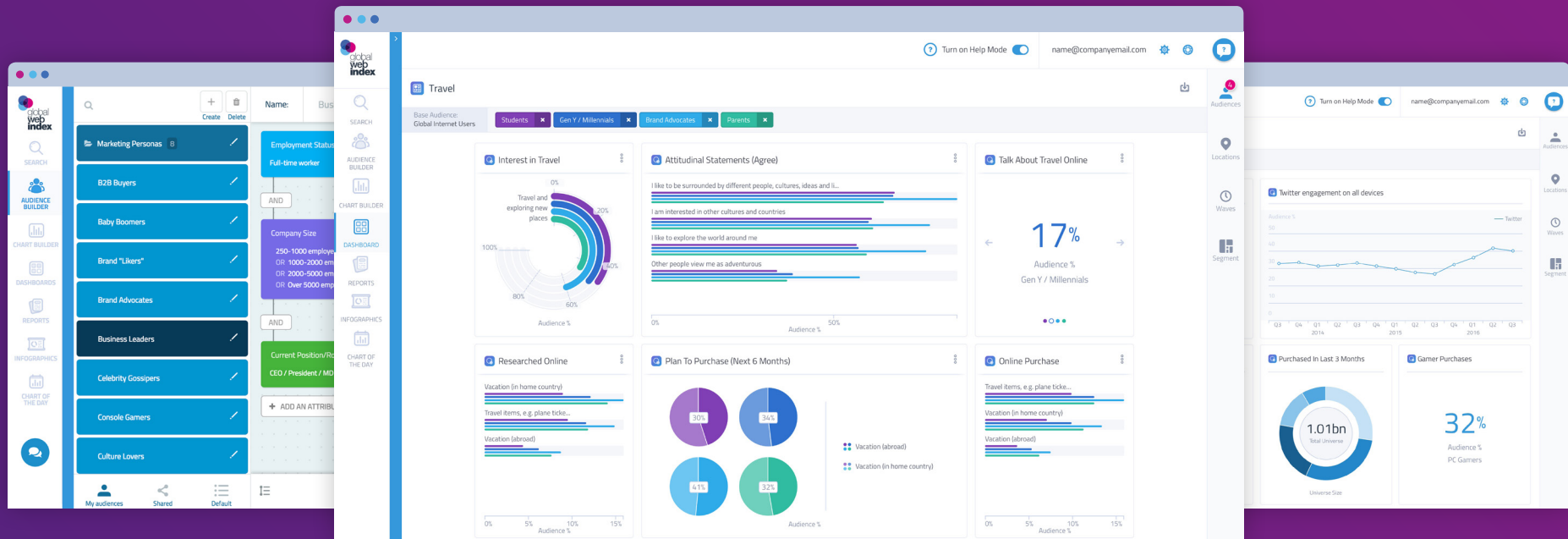
Argentina	77.1%	Ireland	84.0%	Saudi Arabia	81.3%
Australia	90.4%	Italy	62.1%	Singapore	84.2%
Austria	86.3%	Japan	95.8%	South Africa	60.9%
Belgium	89.0%	Kenya	37.9%	South Korea	94.5%
Brazil	65.9%	Malaysia	81.2%	Spain	85.2%
Canada	92.3%	Mexico	69.5%	Sweden	89.0%
China	58.4%	Morocco	59.4%	Switzerland	90.6%
Egypt	45.2%	Netherlands	90.4%	Taiwan	81.1%
France	87.5%	New Zealand	91.6%	Thailand	57.8%
Germany	91.9%	Nigeria	32.5%	Turkey	64.2%
Ghana	45.6%	Philippines	60.8%	UAE	93.4%
Hong Kong	91.8%	Poland	76.6%	UK	96.1%
India	40.1%	Portugal	75.1%	USA	79.0%
Indonesia	32.7%	Russia	81.3%	Vietnam	51.2%



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