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KNOWTHEFAN

The Global Sports Media Consumption Report 2014

France Overview

PERFORM KANTAR MEDIA SportBusiness

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About the project partners

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

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

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

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

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

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

Foreword

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

MARKET INSIGHT

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

"Social media is absolutely fundamental and at the heart

Simon Greenberg Global Head of Rights, News Corp

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

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

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

Jörg Daubitzer Managing Director, DFL Sports Enterprises

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

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

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

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

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

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

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

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

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

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

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

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

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

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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 media, radio, online, social), a wide range of devices (televisions, connected TVs, mobiles, tablets, computers, laptop computers) and a wide range of sports content formats (video, data, editorial, news) in an attempt to fully understand what, where, who and how sports fans are consuming sports media.

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

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

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

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

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

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

FRANCE SPORTS CONSUMPTION OVERVIEW

65%

of adults in France, 33 million fans, claim to follow sports

Top 3 sports followed in France (%)

FOOTBALL	32
TENNIS	24
RUGBY UNION	22

56%

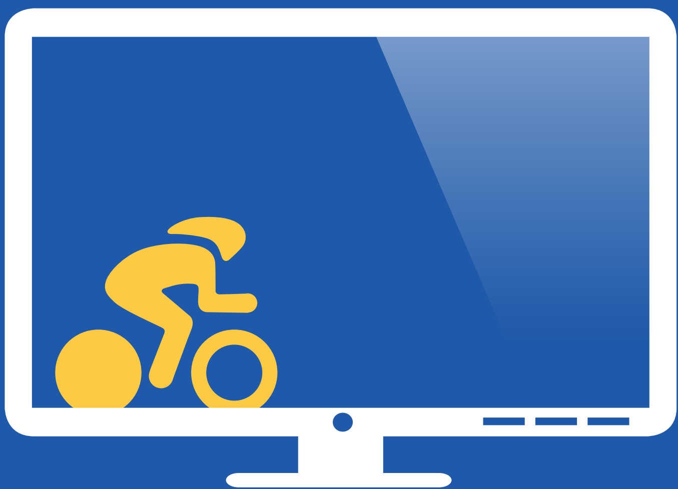
of sports fans are male

3in10

fans consume sports content via a mobile device

5.0

hours per week are spent by fans consuming sports content

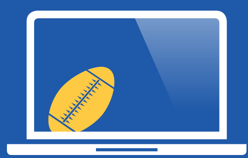


96%

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

21%

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



4in10

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

42%
of online fans watch sports video highlights online

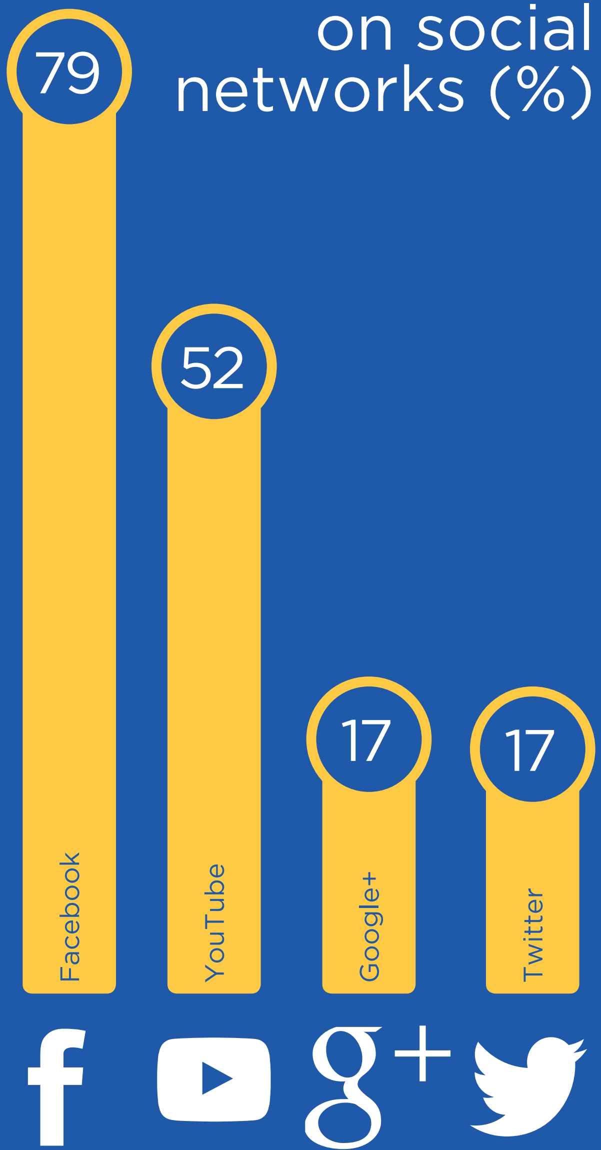
59%
of online fans read sports news content online

4in10
fans use a second screen device while watching sports on TV

53%
of fans consume sports online

45%
of social fans follow a team or league on social networks

Following sports on social networks (%)



ENGAGED FOOTBALL FANS

50%
of engaged football fans attend football games

1in2
engaged football fans read football online via a computer

91%
of engaged football fans watch football on television

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UAE
USA

65%

OF THE ADULT POPULATION CLAIM TO FOLLOW SPORTS

Sports Consumption Overview

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

The size of sport following in France has remained consistent with the previous year, with just under two-thirds of adults claiming to follow one or more sports regularly. This equates to approximately 33.3 million people.

Figure 1: Size of sport following in France

33,300,000	
63%	of adult population claiming to follow sports in 2011
68%	of adult population claiming to follow sports in 2012
65%	of adult population claiming to follow sports in 2013
65%	of adult population claiming to follow sports in 2014

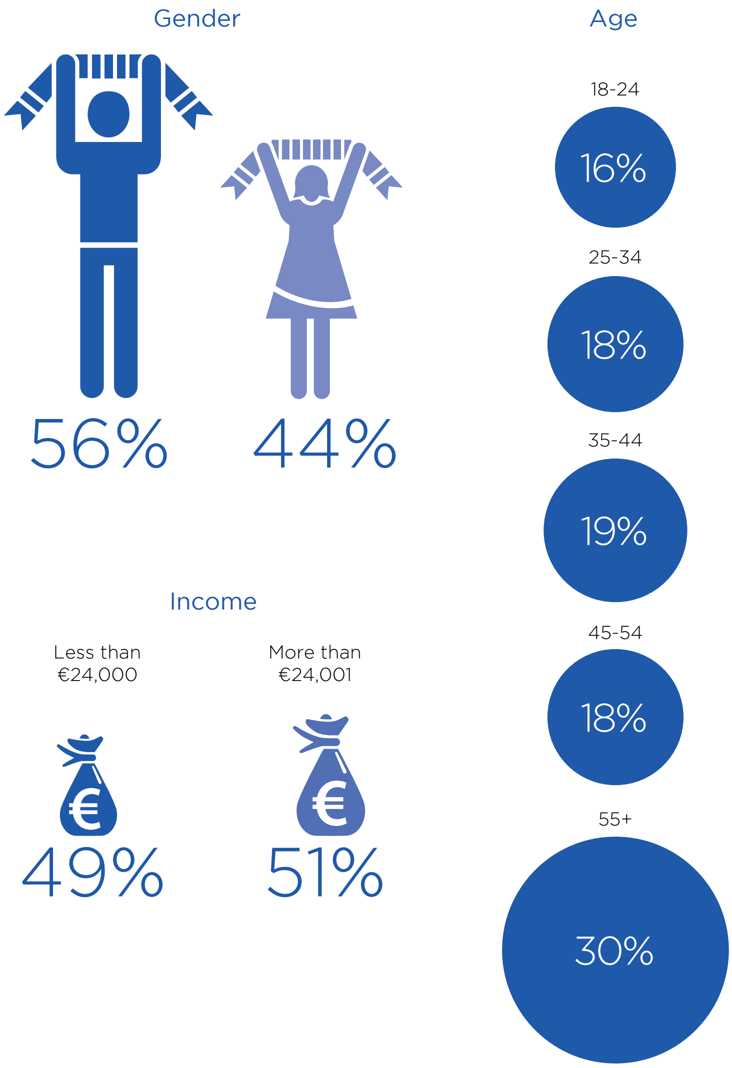
Follow = watch live or highlights coverage and/ or read about frequently and/ or talk about frequently

Profile of a sports fan in France

Sports fans in France are more likely to be male (56%) when compared to the population as a whole (48%). There is also a skew towards those in the higher income band, with 51% of sports fans earning more than 24,001 per year, compared to 46% overall. When looking at age however, there is little difference between sports fans and the overall population.

Figure 2: Profile of a sports fan

(How to read: 56% of sports fans in France are male)



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USA

32%
OF ADULTS
FOLLOW FOOTBALL

24%
OF ADULTS
FOLLOW TENNIS

Top 10 sports followed in France

Football remains the most popular sport in France with 32% of the population following. Tennis (24%) and Rugby Union (22%) are the next most popular sports although the proportion of the adult population claiming to follow both has declined since the previous year.

Figure 3: Top 10 sports followed in France

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 sport)

2011	2012	2013	2014
Football (31%)	Football (34%)	Football (31%)	Football (32%)
Rugby Union (25%)	Rugby Union (27%)	Tennis (26%)	Tennis (24%)
Tennis (23%)	Tennis (25%)	Rugby Union (25%)	Rugby Union (22%)
Formula 1 (17%)	Cycling (21%)	Cycling (21%)	Cycling/ Athletics (19%)
Cycling (16%)	Athletics (19%)	Swimming/ Athletics (18%)	
Athletics/ Swimming (15%)	Formula 1 (16%)		Formula 1 (16%)
	Handball/ Figure Skating (15%)	Formula 1 (17%)	Figure Skating (15%)
Skiing/ Handball (13%)	Swimming (13%)	Handball (14%)	Swimming (14%)
	Gymnastics/ Basketball (9%)	Figure Skating (13%)	Handball (13%)
World Rally Championship (10%)		Skiing (12%)	Basketball/ Skiing (12%)

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

Methods used by fans to follow sport in France

Consumption of sport on TV remains high, and is almost universal among sports fans with 96% in 2014 consuming sport in this way. There has been a notable decline in print this year, with 35% consuming sport via this method in 2014, a decline from 48% the previous year. Whilst declines have also been observed in radio consumption, the increases in online and mobile observed in previous years have accelerated, with online rising from 48% in 2013 to 53% this year, and mobile rising from 23% in 2013 to 30% this year. There has also been notable growth in the consumption of sport via social networking platforms.

Figure 4: Methods sport fans use to consume sport

	% of sports fans using each method to consume sports in ...			
	2011	**2012**	**2013**	**2014**
Watch on TV	91	94	96	96
Print	45	48	48	35
Online	45	49	48	53
Mobile	15	18	23	30
Listen to on radio	34	42	37	32
Attend	36	42	37	37
Social Network Platforms	12	16	15	21

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 programme such as a podcast (2011 – 2013 distinguished between listening via a radio and online)

WWW

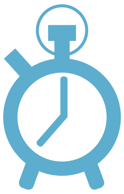
53%

OF FANS FOLLOW SPORTS ONLINE

1in5

FANS CONSUME SPORTS VIA SOCIAL NETWORKING PLATFORMS

AUS
BRA
CHN
FRA
GER
GBR
IND
IDN
ITA
JAP
RUS
RSA
SPA
TUR
UAE
USA



5.0

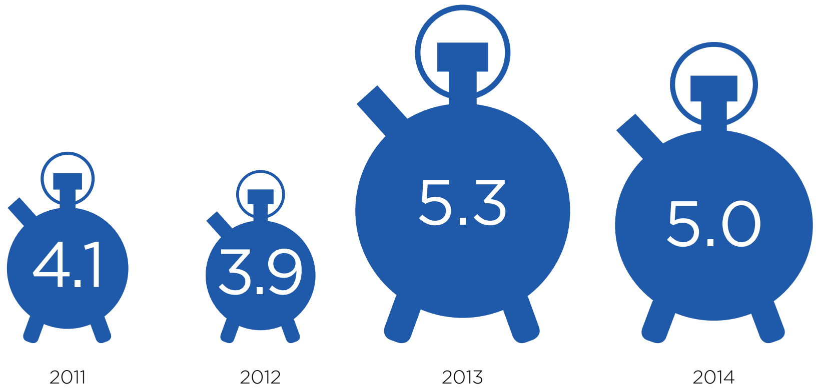
HOURS PER WEEK ARE SPENT BY FANS CONSUMING SPORTS CONTENT

Time spent per week consuming sport

Sports fans in France are spending on average 5.0 hours per week consuming sport, a slight decrease on the 5.3 hours reported in 2013. Despite this, fans are still spending more time per week consuming sport than they were in 2011.

Figure 5: Hours spent per week consuming sport

Average number of hours sports fans spend per week consuming sport



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

2014 includes listening to a radio/sports programme as one activity whereas 2011-2013 listening to a radio and online were 2 separate activities

CONSUMING SPORT ON TV

AUS
BRA
CHN
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IDN
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JAP
RUS
RSA
SPA
TUR
UAE
USA

96%

OF FANS WATCH SPORTS ON TV

Consuming Sport On TV

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

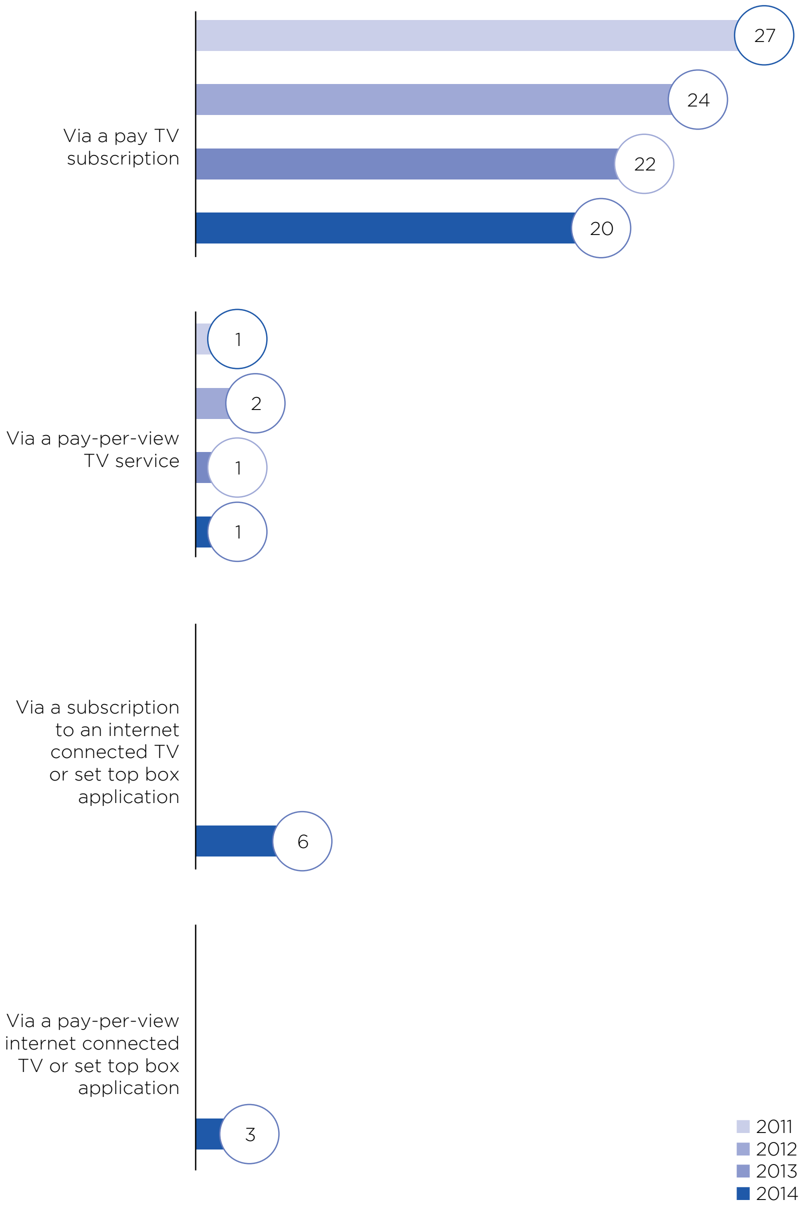
As shown in Figure 4, almost all sport fans (96%) in France watch sport on TV and they spend on average over 2 and a quarter hours per week consuming sport in this way, a figure consistent with the previous year. Television also remains the primary means through which fans catch up with sports news stories with 77% of fans doing so via this method in the current year.

Paying to watch sport on TV

Overall 21% of sports fans in France have paid to watch sport on TV in the last 12 months and almost all have done this via a subscription payment plan (20%). The proportion of fans paying via a TV subscription has continued the decline observed in previous years, with this figure lower than the 27% reported in 2011. The proportion of fans consuming sport on TV via a pay-per-view TV service remains extremely low (1%), although of the additional payment methods this year 6% of fans have paid to watch via a subscription and 3% via a pay-per-view service to an internet connected TV or set top box application.

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

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

1 in 5

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

AUS
BRA
CHN
FRA
GER
GBR
IND
IDN
ITA
JAP
RUS
RSA
SPA
TUR
UAE
USA

24%

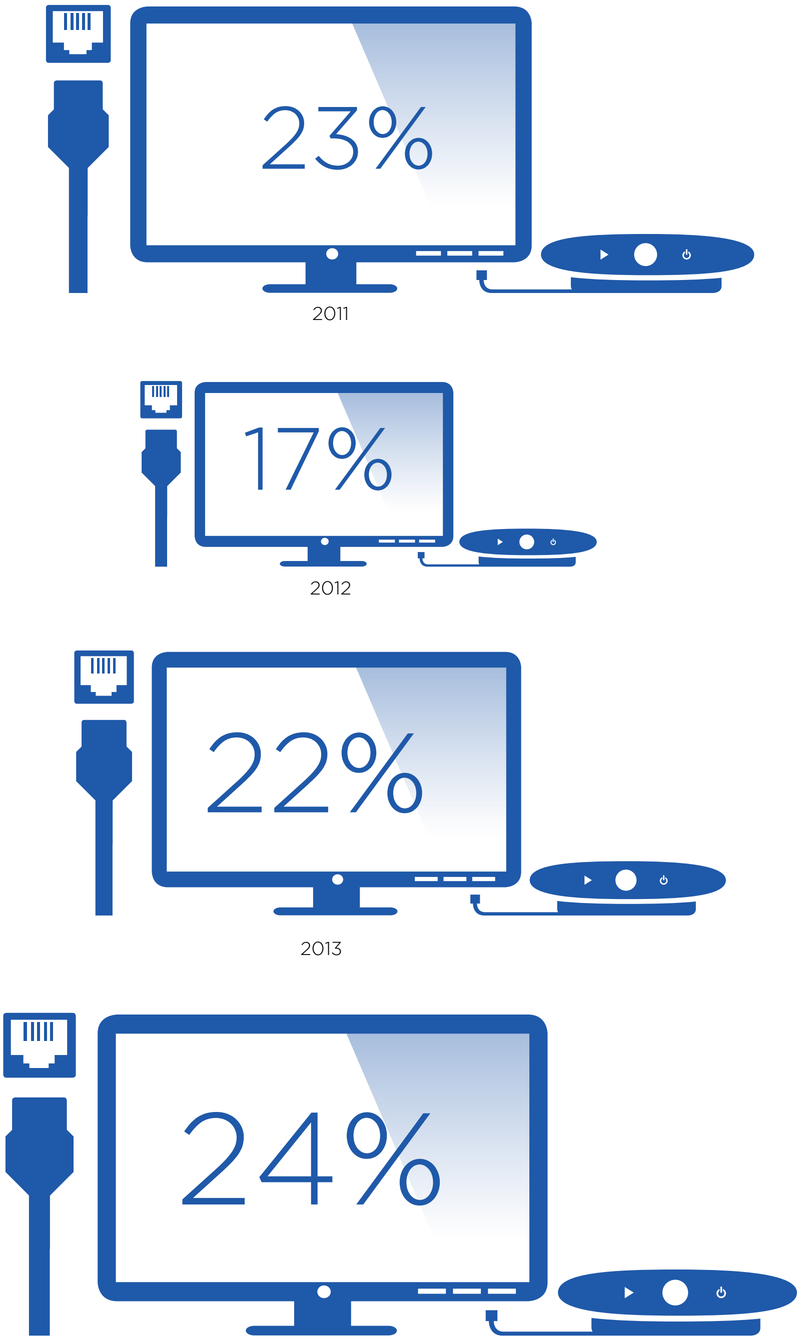
OF FANS CONSUME SPORTS VIA A CONNECTED TV

Consuming Sport On Connected TV

Consumption of sport via connected TVs remains relatively stable year-on-year (aside from the dip reported in 2012). At 24%, the proportion of sports fans consuming via this method makes France one of the leading markets in this area.

Figure 7: Consuming sport via connected TV

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



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

Opinion about consuming sport via connected TV

Amongst fans that consume sport via a connected TV, 27% believe that this method offers them a wider range of sports to watch when compared to their other service providers. This represents a decrease from 36% of users who stated this in 2013. 37% of users in 2014 believe that there is not as much sport available to watch on internet connected TVs when compared to their other service providers (21% stated this in 2013).

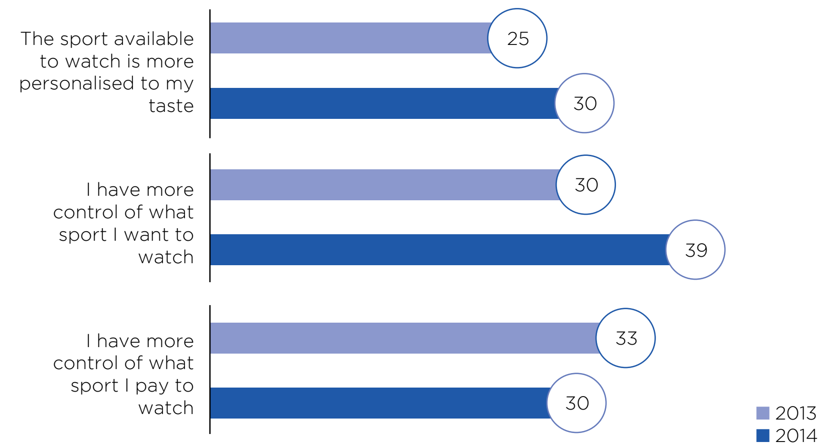
However, as Figure 8 indicates, sports fans who follow sport via connected TVs in 2014 are more likely to agree that the sport available to watch via these devices are more personalised to their taste than they were 12 months ago. In addition, opinion about control over what sport is watched has also increased year on year, although slightly fewer believe that they have more control over what sport they pay to watch on these platforms.

3in10

FANS WHO USE CONNECTED TV BELIEVE THAT THEY HAVE MORE CONTROL OF WHAT SPORT THEY PAY TO WATCH

Figure 8: Agreement with statements about sports content available on connected TV

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



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53%

OF FANS WHO USE A SECOND SCREEN DEVICE ACCESS LIVE SCORES AT THE SAME TIME AS WATCHING SPORT ON TV

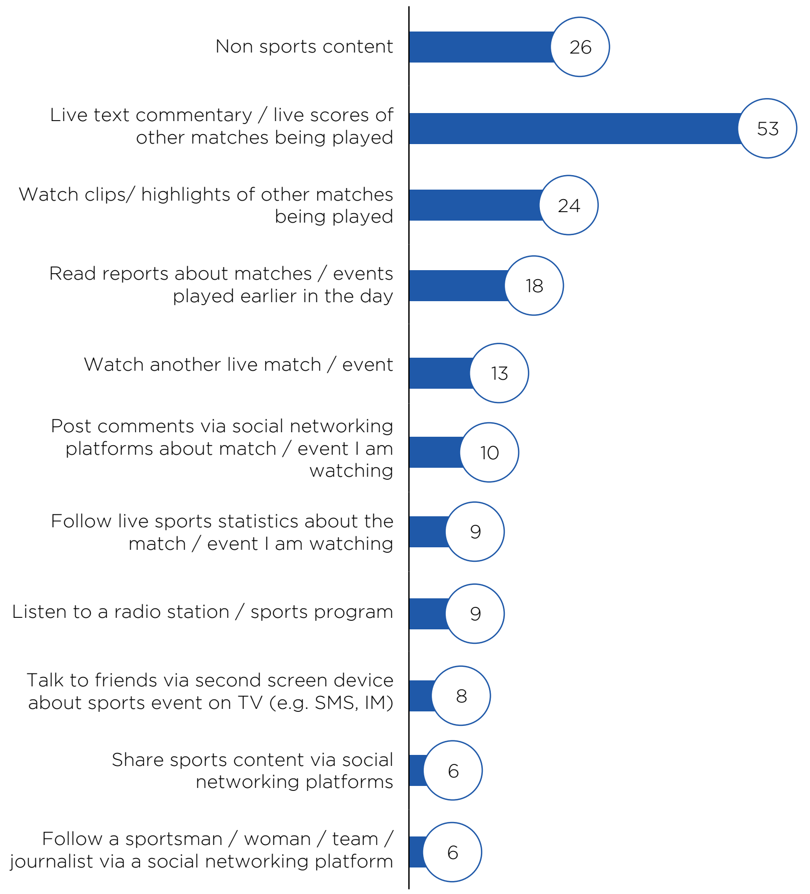
Using a second screen connected device whilst watching sports on TV

40% of fans in France state that they have used a second screen device such as a computer, laptop computer, smartphone or tablet whilst watching sport on TV. Fans that use a second screen typically use these devices for 2 different activities.

Approximately 1 in 4 second screen fans state that they are using their device for non-sports related means / content – the device is essentially distracting their consumption of sport in TV. Amongst the sports content that is accessed on a second screen, following live text commentary of other matches/ events being played is the most popular by a considerable margin, with 53% of second screen fans claiming to do this.

Figure 9: Second screen consumption

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



CONSUMING SPORT ONLINE

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30%

OF FANS ACCESS SPORTS CONTENT VIA A MOBILE DEVICE

Consuming Sport Online

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

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

As Figure 4 indicates, 53% of fans in France follow sport online, with penetration increasing from the 45% reported in 2011. The majority of online fans access content via a computer or laptop computer, with 50% of fans accessing online sports content in this way. Smartphones are more widely used than tablets and the proportion of fans using both has increased year-on-year. As a result, there have also been notable increases in the percentage of fans accessing sports content online via a mobile device, rising from 15% in 2011 to 30% in 2014.

Figure 10: Devices used to access sports content online

(How to read table: 50% 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	15
2012	N/A	N/A	N/A	18
2013	45	17	8	23
2014	50	23	13	30

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 11: Profile of online and mobile sports fans

Online Sports Fans Profile

(How to read: 64% of sports fans in France who follow sport online are male)

Mobile Sports Fans Profile

(How to read: 61% of sports fans in France who follow sport via an internet enabled mobile device are male)

Online sports fans are far more likely to be male (64%) than sports fans generally (56%). Furthermore, fans that follow sport online are typically younger when compared to the profile of the average sports fan and this is accentuated further among fans who consume sport via mobile devices.

	Online	Mobile
Gender		
Male	64%	61%
Female	36%	39%
Income		
Less than €24,000	50%	52%
More than €24,001	50%	48%
Age		
18-24	23%	33%
25-34	21%	28%
35-44	19%	16%
45-54	17%	14%
55+	20%	9%

Online: any consumption of sports online via either a computer/ laptop computer or mobile device

Mobile: any consumption of sports via a mobile device such as a smartphone or tablet computer.

Mobile in 2013 includes fans that follow via social network platforms, listen online and play fantasy gaming on a mobile device.

www

1in2

FANS WHO FOLLOW SPORT ONLINE EARN OVER €24K

28%

OF FANS WHO FOLLOW SPORTS VIA AN INTERNET ENABLED MOBILE DEVICE ARE AGED BETWEEN 25 AND 34

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1.2

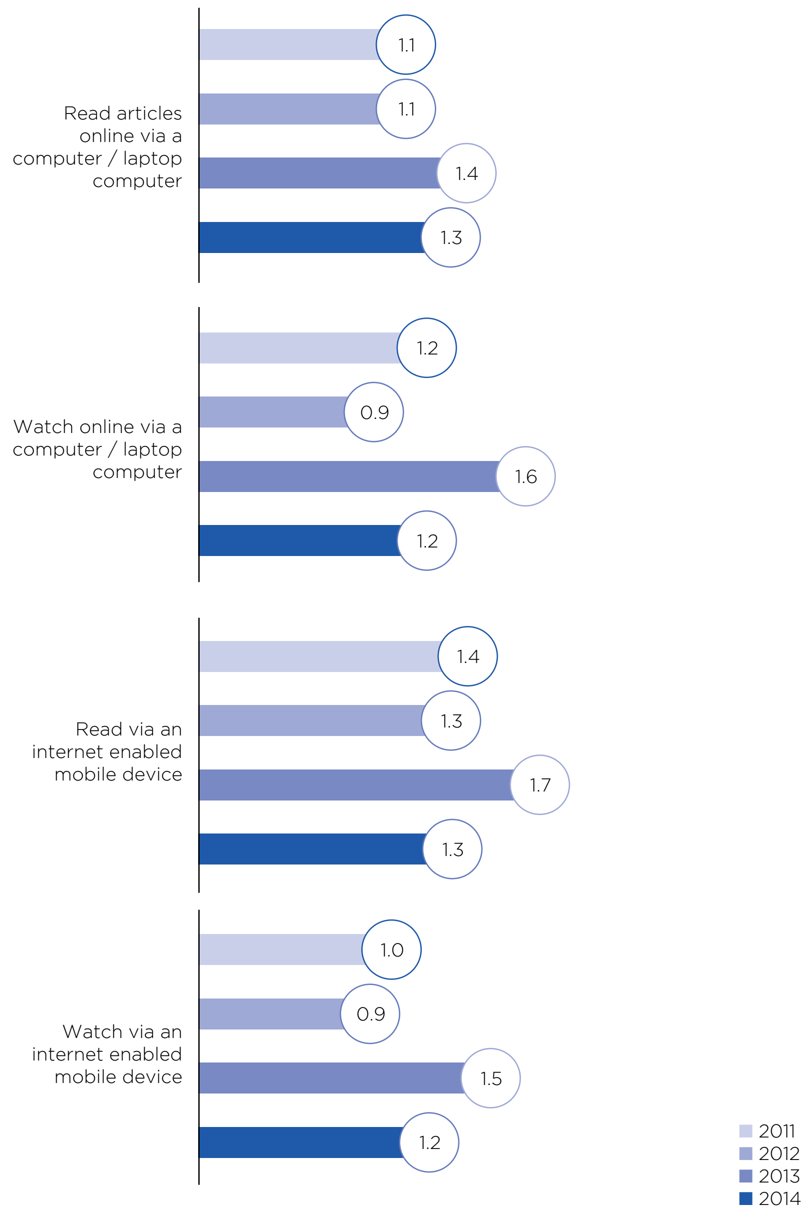
HOURS ARE SPENT WATCHING SPORT VIA AN INTERNET ENABLED MOBILE DEVICE IN AN AVERAGE WEEK

Time spent per week consuming sports online

The amount of time fans spend consuming sport online has declined when compared to the previous year across all measures. In 2014, sports fans in France spend a relatively even amount of time reading or watching sport either via a computer/laptop computer or via an internet enabled mobile device, with figures of between 1.2 and 1.3 hours recorded across all 4 measures.

Figure 12: Hours spent per week consuming sport online

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



Frequency of consuming sports content online

Around 4 in 10 of those accessing sports content online via a computer/ laptop (40%) or via a mobile (42%) do so at least once a day. This is broadly stable year-on-year, but low when compared to some other markets where well over half will be accessing at least once a day.

Figure 13: Frequency of accessing sports content

(How to read: 40% 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	37	81	41	76
2014	40	79	42	82

79%

OF FANS THAT ACCESS SPORTS CONTENT ONLINE VIA A COMPUTER/ LAPTOP COMPUTER DO SO AT LEAST ONCE A WEEK

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10%

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

9%

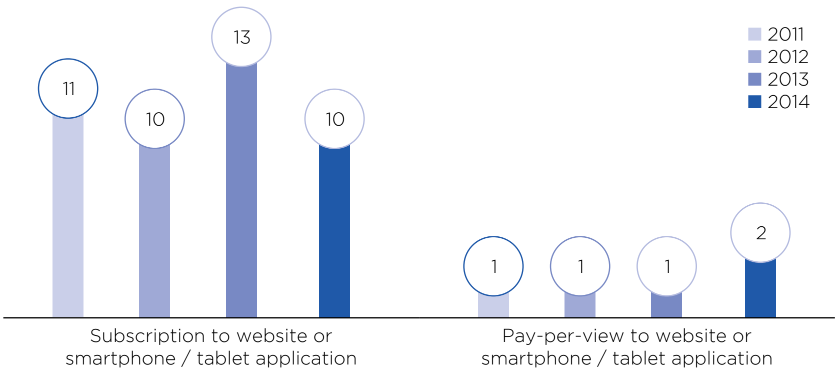
OF FANS WOULD BE WILLING TO PAY FOR LIVE SPORTS CONTENT ONLINE

Paying to watch sports online

Overall, 10% of fans in France have paid to watch sport online in the last 12 months, with the vast majority of these doing so via a subscription as opposed to pay-per-view. The percentage of those paying via a subscription has decreased when compared to the previous year, with this figure returning to 2012 levels. The percentage of those paying to watch sport online via a pay-per-view website or smartphone application remains low and also remains relatively consistent with previous years.

Figure 14: How fans have paid to watch sport online in the last 12 months

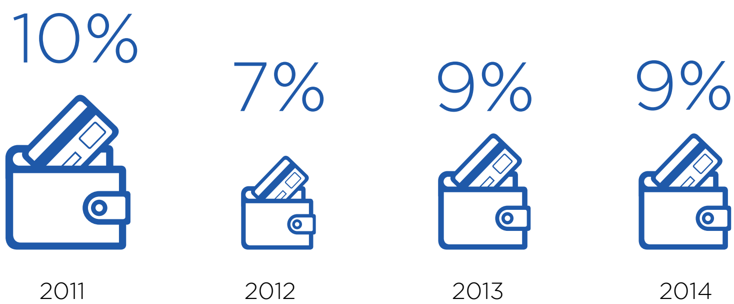
(% of sports fans stating the way in which they have paid to watch sport in the last 12 months)



The percentage of fans willing to pay for live sports content online is generally reflective of those that currently do.

Figure 15: 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

There is a mixture of content viewed online of which live streaming is the most popular and more online fans are watching this content this year. Long highlights are preferred to shorter equivalents, with 42% watching highlights longer than 5 minutes in duration, compared to 29% who watch clips less than 5 minutes in duration. Notable increases have been observed across numerous forms of sports content in the last year, with live streaming of games events increasing from 30% to 44%, videos of game /event highlights (longer than 5 minutes) increasing from 32% to 42% and videos of sports news increasing from 30% to 38% to name but a few.

Unofficial live sports streaming websites are the most popular platforms used to stream live games online and satisfaction with viewing quality online has increased slightly, with 55% satisfied in 2013, compared to 57% this year.

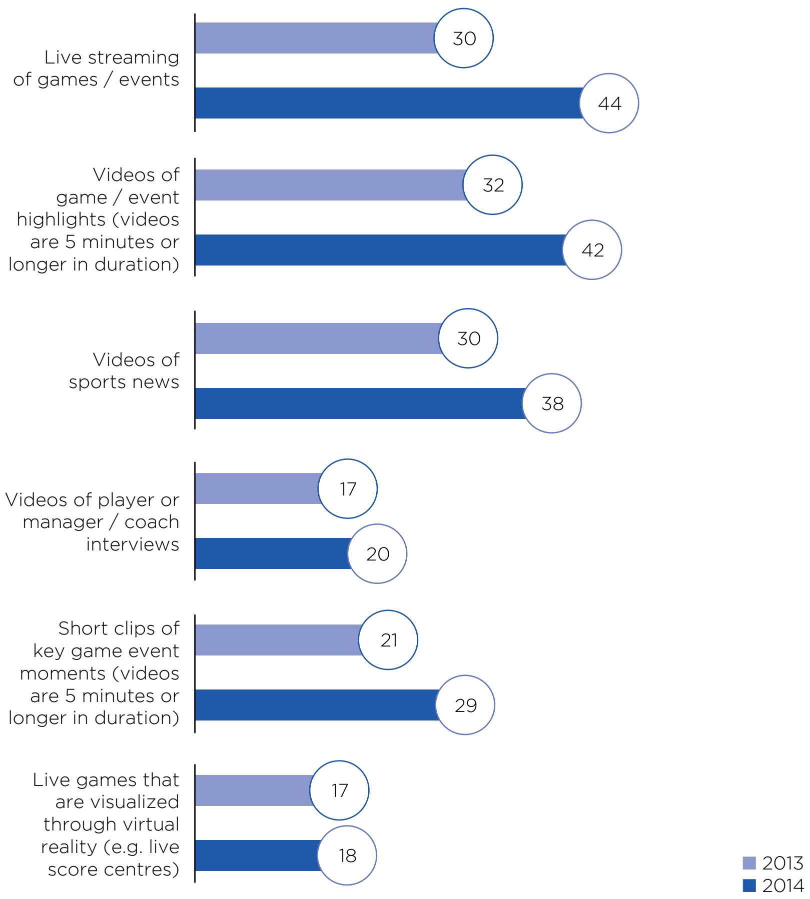
www

44%

OF ONLINE FANS WATCH LIVE STREAMING OF SPORTS EVENTS

Figure 16: Sports content watched online

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



23%

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

Computers/laptop are the main devices used to watch sports content online, with 90% of fans streaming live sport via these methods. Fans tend to use smartphones and tablets to watch highlights rather than live streaming sports, with mobile devices tending to be used in addition to, rather than instead of computers. When looking more closely at mobile devices, smartphones are more widely used than tablets across all content.

Figure 17: Devices used to watch sports content online

(How to read table: 90% 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	90	23	12	29
Videos of game/ event highlights	84	38	23	47
Videos of sports news	86	27	19	37
Videos of player or manager / coach interviews	89	33	11	39
Short clips of key game / event moments	86	26	23	41
Live matches that are visualised through virtual reality	85	28	20	36

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

Reading sports content online

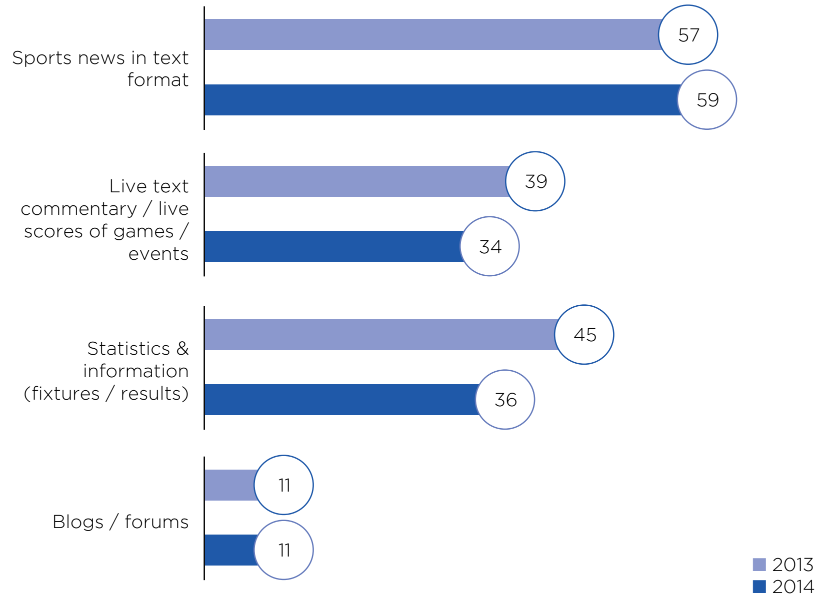
News content continues to be the most popular sports content read online, with 59% of fans that access sports content online doing so for this purpose. Statistics and information and live text commentary / live scores of games / events are accessed by 36% and 34% respectively in 2014, although the percentage of the fans that access sports content online doing both declining since the previous year.

59%

OF ONLINE FANS READ SPORTS NEWS IN TEXT FORMAT

Figure 18: Sports content read online

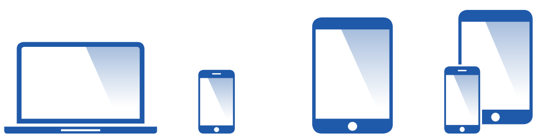
(Type of content read online by fans that access sports content online)



As with watching content, computers and laptop computers are the primary devices used by fans to read content online. The preference of using smartphones more than tablets may be driven by the ease through which content can be accessed on these devices, particularly when out of the home, with smartphones used more widely than tablets across all forms of content, with the exception of blogs and forums. The greater penetration of smartphones over tablets is likely to be another reason as to why they are used by more fans.

Figure 19: Devices used to read sports content online

(How to read table: 83% of fans that read sports news in text format online do so via a computer/ laptop computer)



Sports Content Read Online	Via a Computer / Laptop computer	Via a Smartphone	Via a Tablet Computer	Via a mobile device (NET)
Sports news in text format	83	35	16	41
Live text commentary of games/ events	81	39	13	44
Statistics/ information (Schedules/ results)	86	36	21	44
Blogs/ Forums	84	35	38	51

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

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WWW

31%

OF FANS USE NEWSPAPER/ SPORTS BROADCASTER SITES OR APPS TO ACCESS SPORTS CONTENT ONLINE

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

Fans in France typically use between 2 websites or apps per week to follow sport online. In terms of the types of sites used then newspaper sites are the most popular (31%), followed by sports broadcaster websites (25%) and dedicated sport websites (23%).

Figure 20: Top 5 websites/applications (apps) online sport 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	31% Newspaper	25% Sports broadcaster	23% Dedicated sport	19% General	17% Team/ League

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

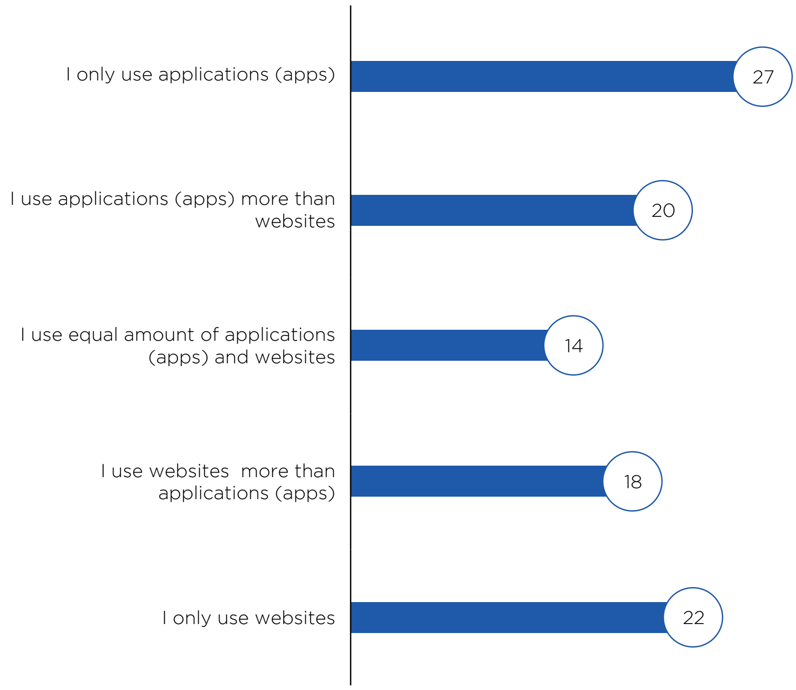
Dedicated sport: refers to websites/apps dedicated to sport but not linked to a newspaper or broadcaster. Example being Kicker

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

Preferences for apps versus websites on mobile devices are skewed towards app usage, with 47% claiming to prefer apps, compared to 40%, who prefer to use websites.

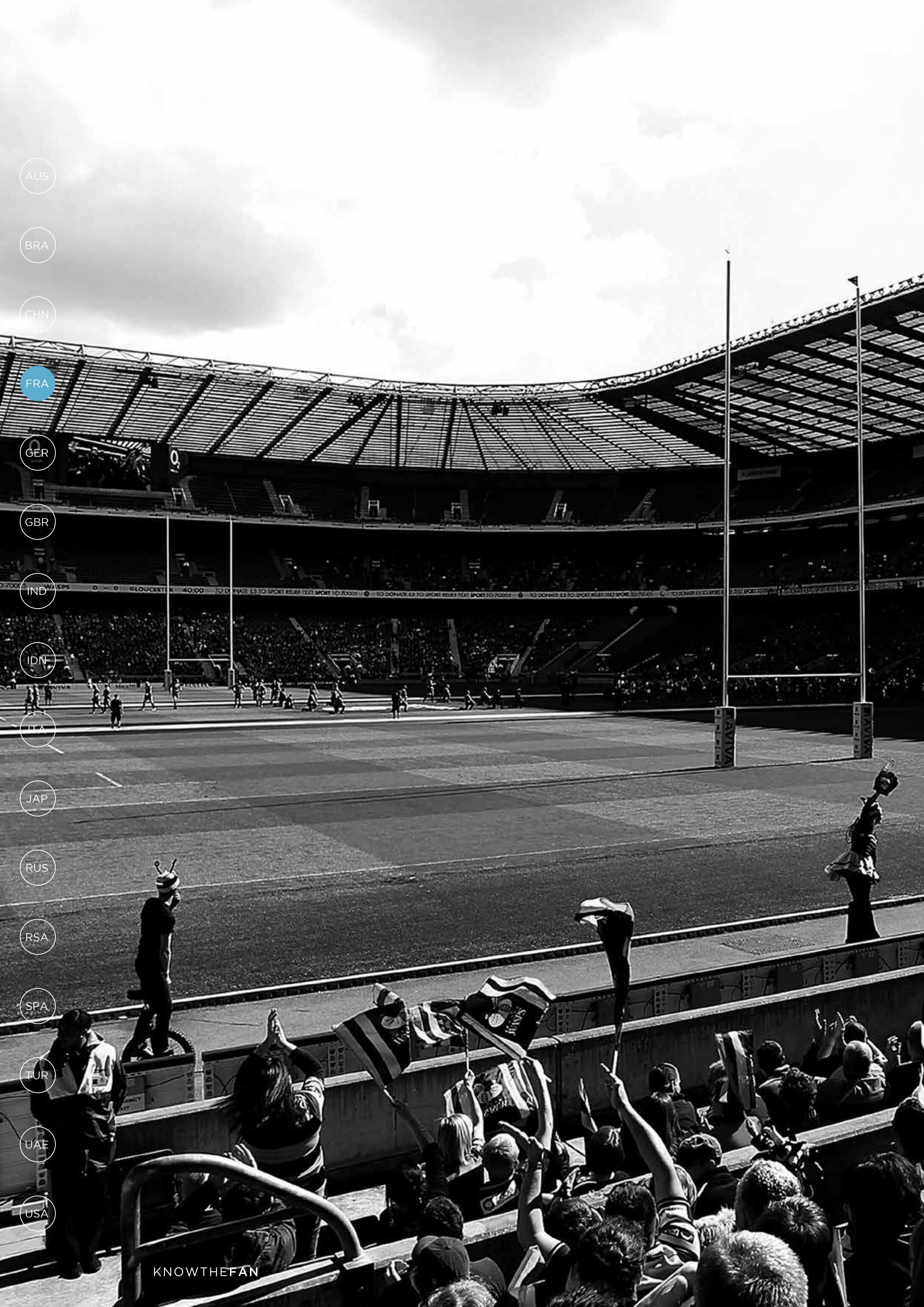
Figure 21: Use of websites and applications (apps) to follow sport on mobile devices

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



27%

OF FANS WHO USE MOBILE DEVICES ONLY USE APPS TO FOLLOW SPORT



CONSUMING SPORT VIA SOCIAL NETWORKING PLATFORMS

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26%

OF SPORTS FANS WHO FOLLOW SPORT VIA SOCIAL NETWORKING PLATFORMS ARE BETWEEN 25 AND 34

Consuming Sports Via Social Networking Platforms

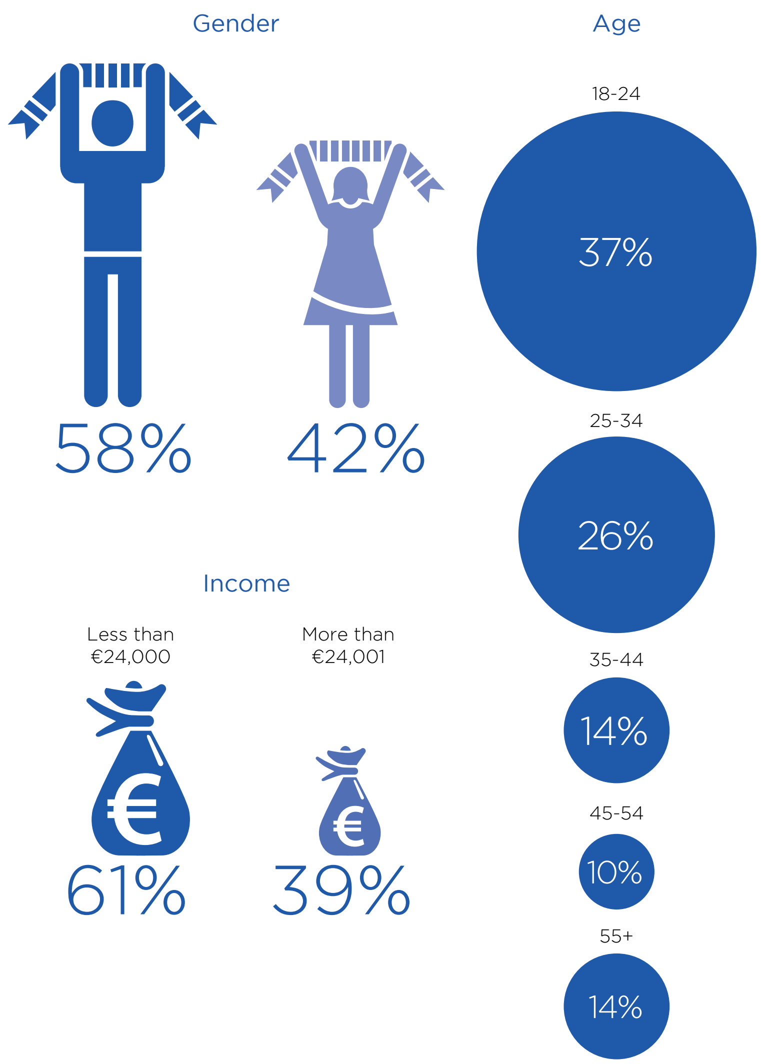
This section provides insight into how fans are consuming sport via social networking platforms.

21% of fans in France follow sport on social networking platforms, representing an increase from the 12% of fans who used this method in 2011. The time spent following sport via this method has also increased slightly this year to 1 and a half hours per week.

As Figure 22 indicates, social networking fans are heavily skewed towards the younger age groups, with 63% aged between 18 and 34, compared to 32% of the general population. In addition, social networking fans in France are also more likely to be male and in the lower income band than the population as a whole.

Figure 22: Profile of social networking sports fans

(How to read: 58% of sports fans in France who follow sport via social network platforms are male)



Social networking platforms used to access sports content

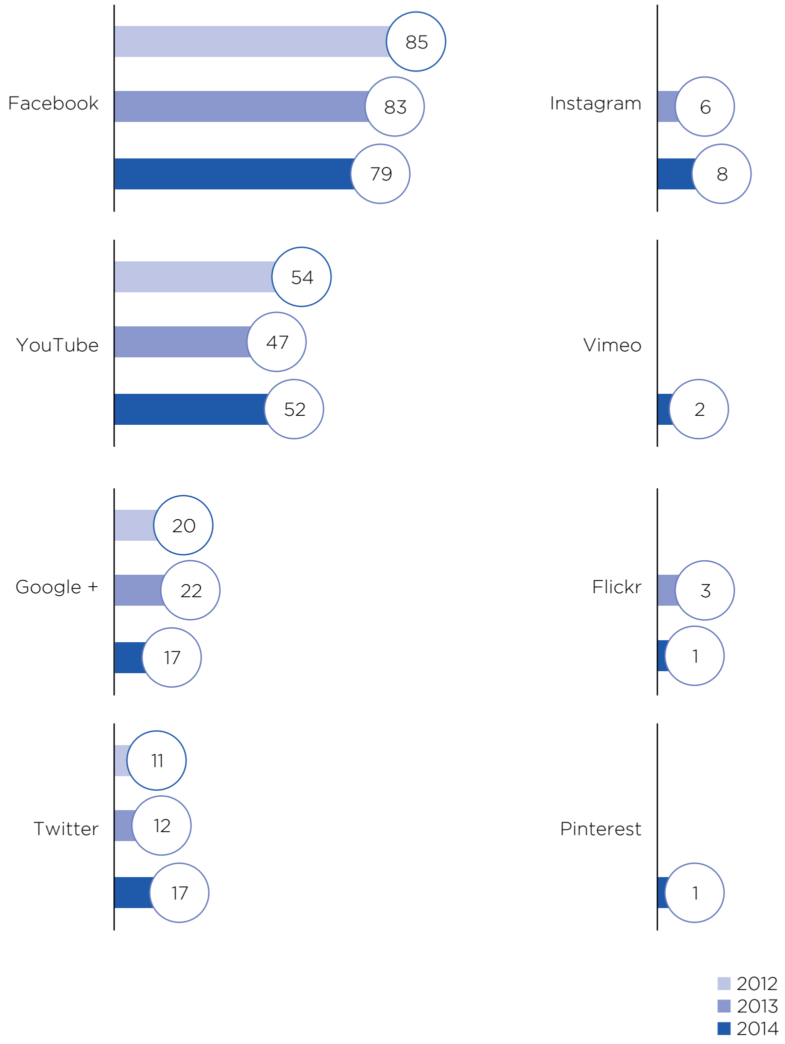
Social networking fans typically use 2 platforms to follow sport. Facebook continues to be the most popular platform used, although its popularity continues to decrease year on year, falling from 85% in 2012 to 79% in 2014. YouTube has retained its position as the second most used social networking platform to access sports content online with an increase observed when compared to the previous year. Twitter has closed the gap on Google+ as the third most popular platform, rising from 12% in 2013 to 17% in the current year.

79%

OF SOCIAL FANS FOLLOW SPORTS ON FACEBOOK

Figure 23: Social networking platforms used to follow sport

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



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46%

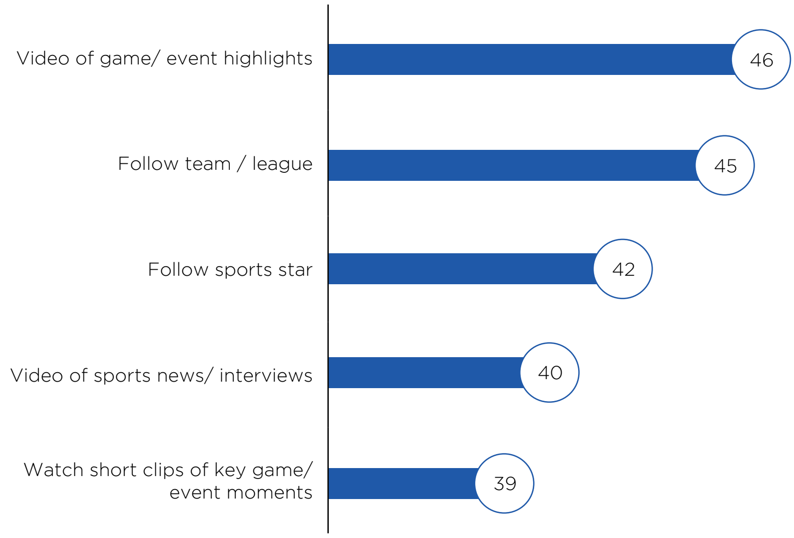
OF SOCIAL FANS USE SOCIAL NETWORKING PLATFORMS TO FOLLOW A TEAM/ LEAGUE

Sports content accessed on social networking platforms

Videos of game/event highlights (46%) are the most popular type of content accessed on social networking platforms, closely followed by following a team/league (45%) and following a sports star (42%).

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

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

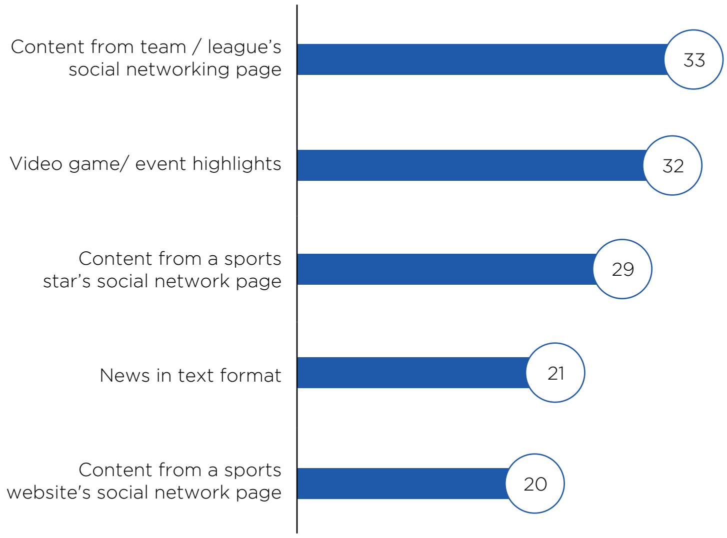


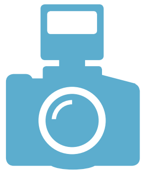
Sports content shared on social networking platforms

Approximately 1 in 3 fans that use social networking platforms to follow sport share content from a team / league's page. Again, other types of content that are most shared amongst social networking users are videos of game/event highlights (32%) and content from a sports star's social networking page (29%).

Figure 25: Top 5 types of sports content shared on social networking platforms

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





29%

OF SOCIAL FANS USE SOCIAL NETWORKING TO SHARE CONTENT FROM A SPORTS STAR'S SOCIAL NETWORK PAGE

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UNDERSTANDING FOOTBALL FANS IN FRANCE

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32%
OF ADULTS FOLLOW FOOTBALL

Understanding Football Fans in France

This section provides insight into football fans in France, the most popular sport followed. 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.

Football fans and engaged football fans

In France, football is followed by 32% of the population, representing approximately 16 million football fans. 39% of football fans are defined as engaged fans (have a high degree of emotional attachment), representing upwards of 6 million engaged football fans in France.

Figure 26: Football fans and engaged football fans

51m	Adult population
16m	Football fans
6m	Engaged football followers

Methods used by fans to follow football in France

In France, engaged football fans are more likely to follow football via a greater number of methods than the average football fan. Whilst use of TV is broadly similar between fans, engaged fans have a greater propensity to follow football via digital methods, print, radio and social networks. Furthermore, engaged football fans are also more likely to attend matches with 50% of engaged football fans claiming to do this, compared to 32% of football fans as a whole.

Figure 27: Football fans and engaged football fans

(How to read table: 88% of football fans follow football on TV)

	% of fans using each method to follow football	
	Football Fans	Engaged Football Fans
Attend	32	50
Watch on TV	88	91
Print	32	48
Watch online via a computer/ laptop computer	38	54
Read online via a computer/ laptop computer	37	50
Listen to radio/ sports program	36	43
Watch via a mobile device	22	35
Read via a mobile device	18	30
Social Network Platforms	19	28

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

NEWS

48%

OF ENGAGED FOOTBALL FANS READ VIA PRINT MEDIA

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31%

OF FOOTBALL FANS ARE REALLY EXCITED ABOUT THE 2014 WORLD CUP

Football fans and the World Cup Finals 2014

In terms of the World Cup in Brazil, engaged football fans in France are significantly more excited about the forthcoming tournament than football fans and the average sports fan.

Figure 28: Excitement around the 2014 World Cup

(How to read table: 17% of sports fans are really excited (top 2 box on a 10 point scale) about the 2014 World Cup)

	Sports Fans	Football Fans	Engaged Football Fans
Excited (top 2 box)	17%	31%	60%

Engaged football fans are more likely to follow the 2014 World Cup via a greater number of methods than football fans and sports fans.

TV is cited by all fans as the main method through which they will follow the tournament, followed by online methods and print media. For online methods of following the tournament, fans are more likely to follow via a computer/laptop than via mobile devices.

Figure 29: Intention to follow the World Cup in France

(How to read table: 58% of sports fans intend to follow the 2014 World Cup on TV)

	% of fans that intend to follow the World Cup Finals via the following methods		
	Sports Fans	**Football Fans**	**Engaged Football Fans**
Attend Events Live	4	6	7
Watch on TV	58	83	87
Print	10	12	16
Online	18	23	23
Watch online via a computer/ laptop computer	7	11	13
Read online via a computer/ laptop computer	11	14	12
Listen to radio/ sports program	6	9	11
Watch via a mobile device	3	6	10
Read via a mobile device	5	6	8
Social Network Platforms	3	5	6

Print: includes newspapers and magazines

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

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

87%

OF ENGAGED FOOTBALL FANS INTEND TO FOLLOW THE 2014 WORLD CUP ON TV

KNOWTHEFAN

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