



# Sports Around the World

GlobalWebIndex's insight report on how digital consumers around the world engage with sports

INSIGHT REPORT 2019

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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), the Middle East and Africa (MEA), and North America, how the relationship of sport differs by region, and the potential to reach fans through 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 be viewing?
- ✔ **Sports Viewing** – how many people are following sports on their phone, who uses social media for their sports content, and who follows sports stars online?
- ✔ **Sports by Region** – what sports and events/leagues are most popular in each region, and what trends are shaping the sporting landscape around the world?
- ✔ **Sports Sponsorship** – what are the opportunities for some of the biggest brands with their sponsorships with sporting leagues and teams?

## METHODOLOGY

All figures in this report are drawn from GlobalWebIndex’s online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle East and Africa, and the Asia Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent, and educated than the total population.

Each year, GlobalWebIndex interviews over 575,000 internet users aged 16-64 via an online questionnaire for our Core dataset. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex’s Core survey via PC/laptop/tablet.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of “1.20” means that a given group is 20% above the global average, and an index of “0.80” means that an audience is 20% below the global average.

# Key Insights

## Asia Pacific

The social, political, and economic significance of sports in the Asia Pacific region has been continually on the rise. China, Japan, and South Korea are undoubtedly global sporting powerhouses, and the governments here have strategically invested in high performance sport to display their power symbolically through sport.

The NBA is particularly popular in APAC, especially in China. The relatively high engagement figures (38%) here are indicative of a very financially beneficial relationship for both parties, with China supporting millions of dollars worth of business. However, this lucrative relationship has been strained recently.

## Europe

Winter Sports is one of the most distinctive sporting preferences in the region. In Austria, Denmark, Germany, Poland, and Romania, Winter Sports is the most distinctive sport watched compared to the global average. This popularity is reflected in Europe’s general superiority, which is shown by their dominance at the 2018 Winter Olympics. Out of the 307 medals available, 210 were awarded to European athletes.

While figures for the Rugby World Cup are low, this masks prominent country-by-country differences in Europe. In Ireland, France, and the UK, engagement is much higher for the event, although is still a way off South Africa and New Zealand where rugby is distinctly linked to the national identity. In a bespoke survey looking at Rugby World Cup fans in the UK, we found that only 1 in 10 correctly predicted South Africa as champions.

## Latin America

Perhaps more so than any other region, soccer is venerated in Latin America. Almost three-quarters of all internet users aged 16-64 regularly watch soccer on online or broadcast TV, a figure that remains consistent across all age groups. And this is not just male engagement; more females regularly watch soccer in LatAm than males in APAC or North America.

There is a diehard attitude to local leagues in LatAm. As the third most watched event or league, coming ahead of the Champions League and the Winter Olympics, the Copa Libertadores is followed by 41% of consumers here. This engagement increases with age, with half of 55-64s watching the annual competition.

## Middle East & Africa

Nations in MEA have transformed themselves into significant global players, through high-profile sponsorship deals, significant investment in sports properties, successful bids for major events, and growing sway in world sport’s corridors of power.

Many annual sports events and competitions have the highest engagement in this region, both on linear and online TV. This is especially the case for soccer. Over half of respondents in MEA say they watch or follow the UEFA Champions League, compared to 47% in Latin America and 39% in Europe – regions that tend to be most affiliated with a love of soccer.

## North America

American football is the clear stand-out in North America. Engagement with the sport increases with age, peaking at 53% among 55-64s. Interestingly, there is quite an even split between male and female engagement. In fact, it has a more equal ratio of male and female watchers than other popular sports such as athletics, baseball, basketball, soccer, and ice hockey.

In North America, there are key differences between the fanbases of the NFL and the NBA. The NFL is still followed by more North American 16-24-year-olds than the NBA, but the difference is gradually decreasing, with just a three percentage-point difference between the two leagues. Compare this to 55-64s, and the NFL dominates engagement, with a substantial 28 percentage-point lead over the NBA.

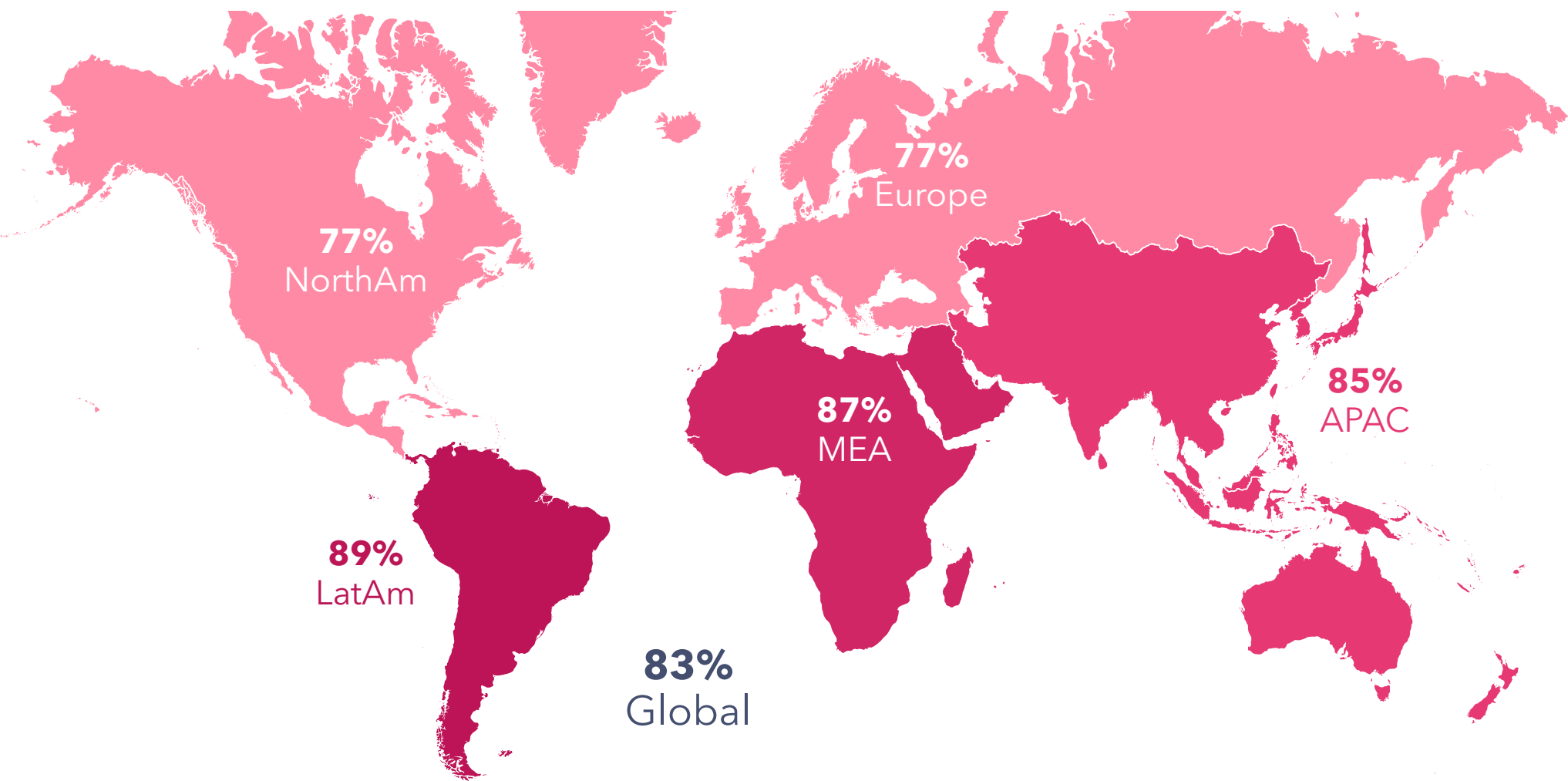
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Sports Around the World

# Worldwide Engagement

# Global Sports Viewing

% who have watched at least one sport on online or broadcast TV

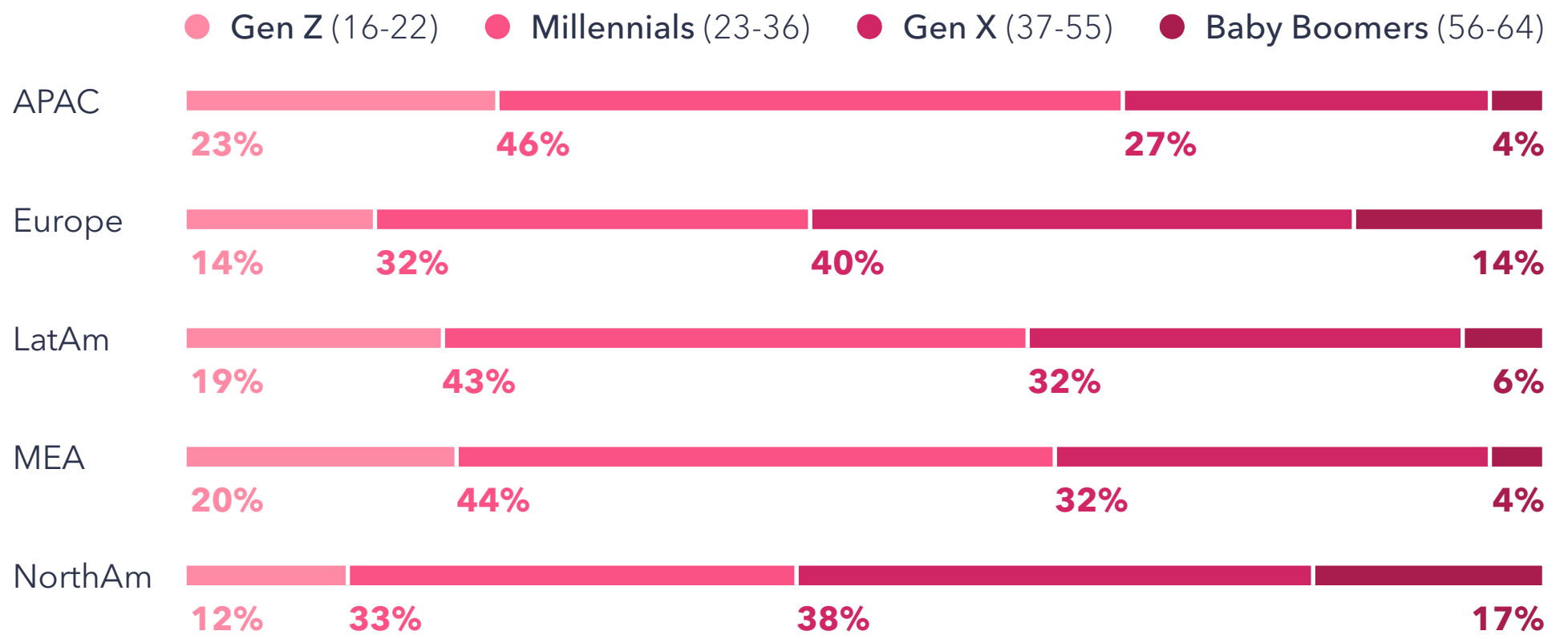
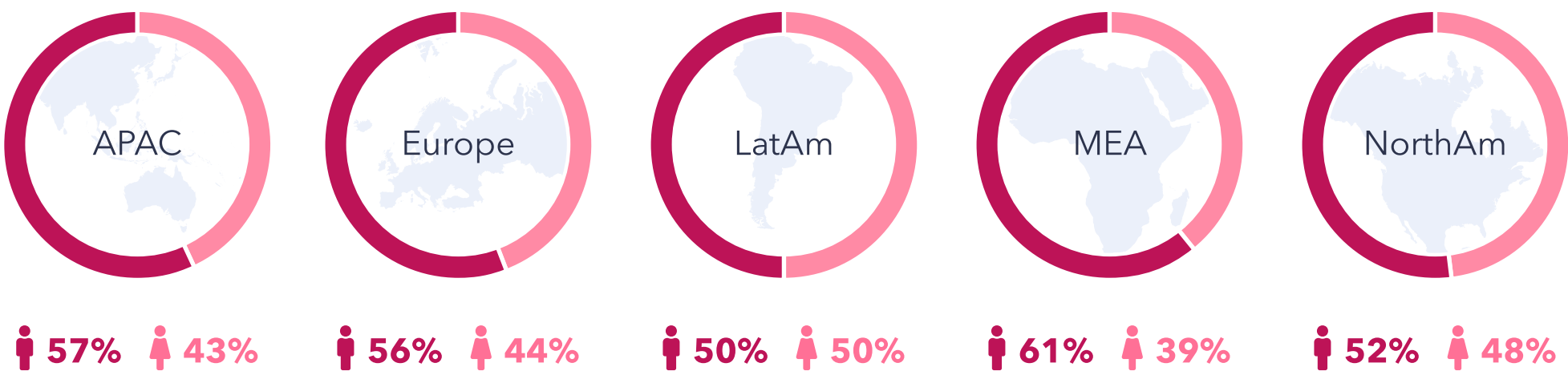


Globally, 35% of internet users say that watching sport is an interest of theirs – a sentiment that is most pronounced among men across all age groups. But if we focus on those who report watching one or more sports online or on TV, it is clear that this overall behavior is commonplace – 83% of users 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**

toward males (88%), but even among women the figure is quite high, with 78% watching at least one sport. Across the regions, all have a minimum of three-quarters that watch at least one sport, with Latin America showing the highest figures at 89%. Latin America is also the only region where males and females are equally as likely to watch at least one sport, although North America also has a fairly equal split.

% of sport watchers who fall into the following demographic breaks



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 the Middle East/Africa show a large skew toward younger demographics and a sharp drop off for baby boomers.



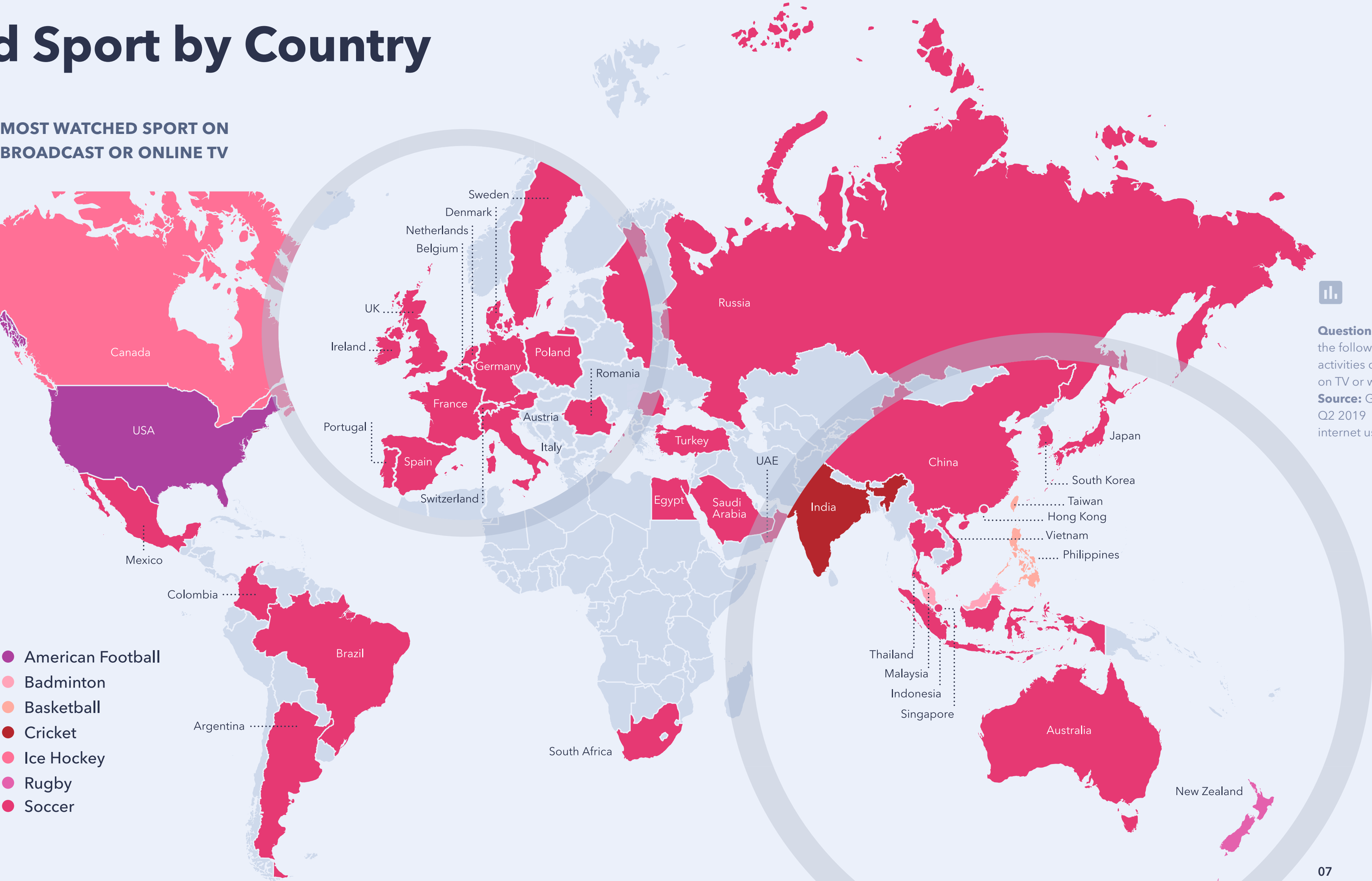
**Question:** Which of the following sports/activities do you play, watch on TV, watch online or watch live in person?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 93,144 internet users aged 16-64 watching at least one sport on TV or online

# Most Watched Sport by Country

For sports watched regularly on broadcast or online TV, it's soccer which takes the top spot, with a 26 percentage-point lead over the second most-watched sport, basketball. **A love of soccer is a trend that cuts across regions, with 34 out of the 41 markets we survey citing it as their most followed sport.** Beyond soccer, the other most popular sports to watch are in fairly close proximity in terms of their relative popularity levels; there is only a 10-point difference between third-placed swimming and twelfth-placed martial arts.

Beyond this, **we naturally see some very prominent regional and country-level differences in sports engagement.** For example, although only 13% of global digital consumers are regularly watching cricket, this rises to 67% in India. Likewise, global figures for viewership of American football (11%) and baseball (11%) increase considerably when examining the U.S. market (rising to 46% and 35%, respectively).

MOST WATCHED SPORT ON BROADCAST OR ONLINE TV



**Question:** Which of the following sports/activities do you watch on TV or watch online?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 115,963 internet users aged 16-64

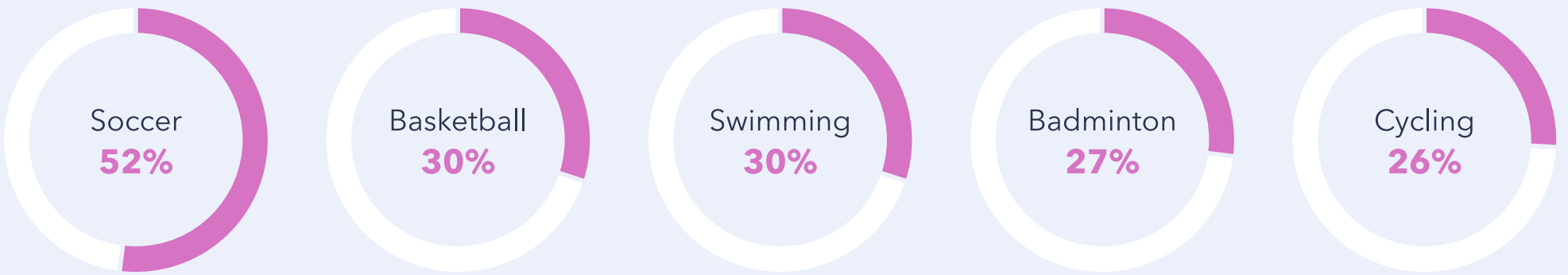
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Sports Around the World

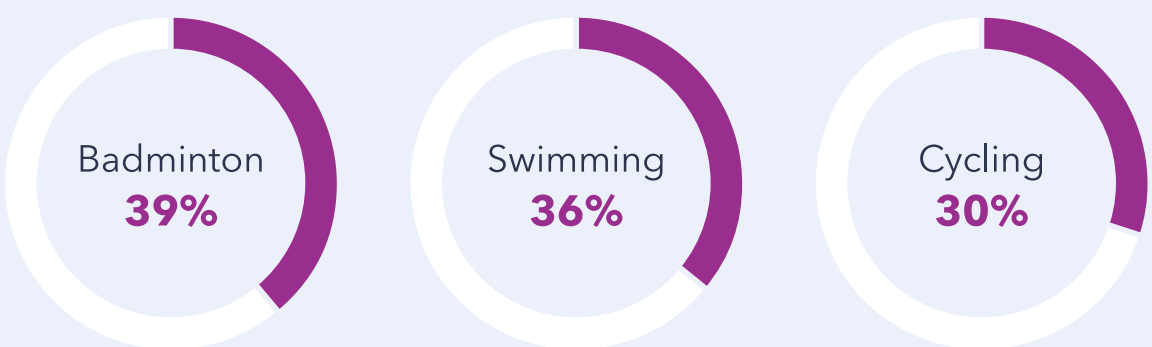
# Sports by Region

# Asia Pacific

**MOST WATCHED SPORTS** | % who say they regularly watch the following on online or broadcast TV



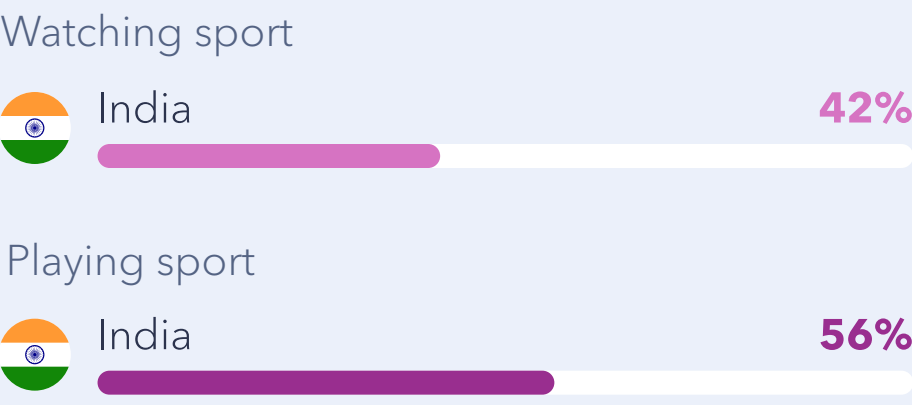
**MOST PLAYED SPORTS** | % who say they take part in...



The social, political, and economic significance of sports in the Asia Pacific region has been continually on the rise – China, Japan, and South Korea have never failed to finish outside the top 10 positions in the Olympics medal tally since Athens 2004. They are undoubtedly global sporting powerhouses, and **the governments here have systematically fostered elite athletes, having strategically invested in high performance sport to display their power symbolically through sport.**

As well as a symbol of status, sport can be transformative. Japan’s narrow 34-32 win against South Africa in 2015 is widely regarded as one of the greatest shocks in rugby history, and helped put Japanese rugby on the map. Fast forward to 2019, and the Rugby World Cup in Japan has significance beyond sport. It has been an opportunity to show Japan as an outward-looking nation in a tense socio-economic context, and is seen as a strong indicator of how the country will handle the Tokyo Olympics next year.















**COUNTRY WITH HIGHEST INTEREST IN...**



As Asian athletes at international sporting events become more visible, and more major global sports mega-events are hosted in APAC countries, the Asian sports industry will continue to rapidly expand. India will be a key market to watch; **out of the 14 markets we survey in APAC, Indian internet users are the most likely to cite an interest both in playing and watching sport.**

**MOST DISTINCTIVE SPORT WATCHED**

Indexes are against the global average for watching the following sports on online or broadcast TV

		INDEX
	Rugby	 <b>Australia</b> <b>3.48</b>
	Table tennis	 <b>China</b> <b>1.88</b>
	Squash	 <b>Hong Kong</b> <b>2.32</b>
	Cricket	 <b>India</b> <b>5.36</b>
	Badminton	 <b>Indonesia</b> <b>3.35</b>
	Baseball	 <b>Japan</b> <b>2.48</b>
	Badminton	 <b>Malaysia</b> <b>3.46</b>
	Rugby	 <b>New Zealand</b> <b>6.47</b>
	Volleyball	 <b>Philippines</b> <b>2.90</b>
	Netball	 <b>Singapore</b> <b>1.68</b>
	Baseball	 <b>South Korea</b> <b>4.04</b>
	Baseball	 <b>Taiwan</b> <b>3.35</b>
	Volleyball	 <b>Thailand</b> <b>3.22</b>
	Martial arts	 <b>Vietnam</b> <b>1.75</b>



**Questions:** Which of these sports/sporting activities do you regularly play or take part in? Which of them do you regularly follow, watch or have any interest in? And which of them do you regularly watch on broadcast TV, watch online, or watch/attend in person? | Which of these things are you interested in?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 38,496 internet users in APAC aged 16-64

# Asia Pacific

## MOST WATCHED LEAGUES AND COMPETITIONS

% who regularly follow or watch the following events/leagues



The Asia Pacific region offers the largest consumer market for the global sport industry. A huge volume of Western sports media products such as the MLB, the NBA, and the English Premier League (EPL) is consumed in this area. Teams from the prestigious North American and European leagues even organize regular Asian tours in order to maintain and perhaps increase their market share.

The NBA is particularly popular in APAC; a third of internet users here follow the NBA, and they are 1.3x more likely than the global average to watch the league on online TV. These figures are massively inflated by the Philippines. Basketball is ingrained in Filipino culture, and has been for more than a century when Christian missionaries in the United States started spreading the game around the world as a kind of sports imperialism. Fast forward to today, and a startling 72% in the Philippines watch or follow the NBA. Compare this to the 28% in the U.S. following the NBA, and you begin to appreciate the fanaticism.

The NBA is also beloved in China, with relatively high engagement figures (38%) that are indicative of a very financially beneficial relationship for both parties, with China supporting millions of dollars worth of business. However, this lucrative relationship has been strained recently, as the Houston Rockets general manager Daryl Morey tweeted in support of anti-government protests in Hong Kong.

The incident has threatened the league’s sponsorship and broadcasting deals in China. Indeed, China’s state broadcaster CCTV and NBA’s streaming partner Tencent did not show any of the opening NBA games. This could be a disaster for both parties, as the appetite for the NBA in China, and APAC generally, is huge; about 800 million citizens in China alone watched NBA broadcasts on some device in the league’s 2018 season.



The league launched NBA China ten years ago. NBA China is now worth more than \$4 billion, or \$133 million in value for each team. Look at the Tencent deal. The league signed a \$700 million, 5-year deal with the Chinese Internet and tech company in 2015 for Tencent to carry NBA games and other content on its digital platforms. That deal has been so successful that the spend for the NBA will be over \$800 million.

– Mike Ozanian, Forbes



**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 Q2 2019 **Base:** 38,496 internet users in APAC aged 16-64

# Europe

MOST WATCHED SPORTS | % who say they regularly watch the following on online or broadcast TV



MOST PLAYED SPORTS | % who say they take part in...



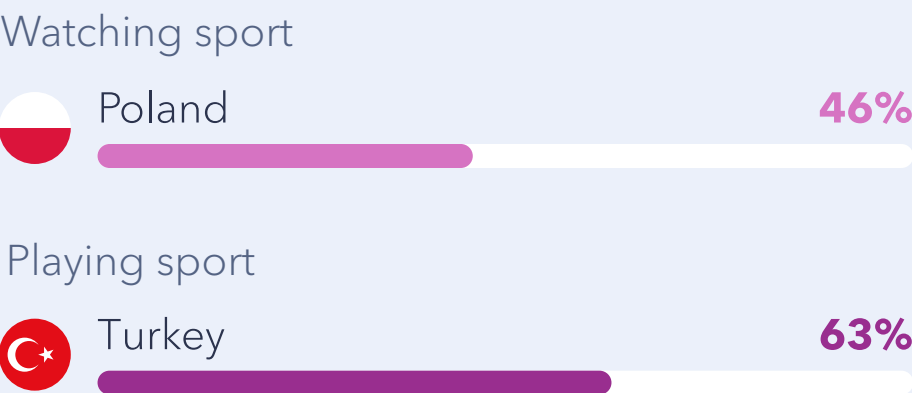
Soccer is the most watched sport on online or broadcast TV in Europe, with the highest engagement in Portugal (71%), Poland (70%), and Turkey (69%), and the lowest in Russia (44%). Tennis comes second, with Wimbledon coming top as the most popular tennis event.

**Winter Sports makes up the top three watched sports, and is one of the most distinctive sporting preferences in the region.** In Austria, Denmark, Germany, Poland, and

Romania, Winter Sports is the most distinctive sport watched compared to the global average. This popularity is reflected in Europe’s general superiority, which is shown by their dominance at the 2018 Winter Olympics. Out of the 307 medals available, 210 were awarded to European athletes.

**Those in the top income quartile globally are more likely to both watch (Index 1.19) and play (Index 1.54) Winter Sports.** This

COUNTRY WITH HIGHEST INTEREST IN...



could therefore be an ideal sport to integrate the latest technology; futurologist Dr. Ian Pearson **anticipates** that we will likely see some convergence of computer game technology, virtual world design, and shared VR Resorts by the 2030s. Virtual reality could also allow consumers to try out different resorts and ski slopes when evaluating travel options, which is a nice example of how the hospitality and travel industries should be looking to augment the consumer experience.

MOST DISTINCTIVE SPORT WATCHED

		INDEX
	Winter sports  Austria	3.28
	Field Hockey  Belgium	1.42
	Winter sports  Denmark	1.86
	Rugby  France	3.66
	Winter sports  Germany	1.79
	Rugby  Ireland	6.11
	Rugby  Italy	2.00
	Field hockey  Netherlands	3.10
	Winter sports  Poland	2.87
	Soccer  Portugal	1.35
	Winter sports  Romania	2.22
	Ice hockey  Russia	3.71
	Tennis  Spain	1.72
	Ice hockey  Sweden	4.29
	Ice hockey  Switzerland	3.65
	Volleyball  Turkey	1.85
	Rugby  UK	3.60



**Questions:** Which of these sports/sporting activities do you regularly play or take part in? Which of them do you regularly follow, watch or have any interest in? And which of them do you regularly watch on broadcast TV, watch online, or watch/attend in person? Which of these things are you interested in?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 42,103 internet users in Europe aged 16-64

# Europe

## MOST WATCHED LEAGUES AND COMPETITIONS

% who regularly follow or watch the following events/leagues



Europe has some of the most popular cross-regional events and leagues in the world. **The Premier League is watched by 40% in the Middle East and Africa; LaLiga is watched by a third of consumers in Latin America; and 1 in 5 in APAC follow the Tour de France.** Sometimes this global following supersedes engagement in the league’s home country; the UK viewing figures for the Premier League (40%) comes behind Thailand (57%), Indonesia (51%), Egypt (44%), and Vietnam (44%). Similarly, whereas 22% in France follow the Tour de France, this pales in significance to the 53% watching in Colombia.

While figures for the Rugby World Cup are low at 6%, this masks prominent country-by-country differences in Europe. **In Ireland (34%), France (20%), and the UK (19%), engagement is much higher for the event, although is still a way off South Africa (48%) and New Zealand (39%) where rugby is distinctly linked to national identity.**

With the Rugby World Cup recently coming to a close, it seems a fitting time to revisit a bespoke [survey](#) done in September which looked at the perceptions and behaviors of the Rugby World Cup (RWC) audience. Having won in 2011 and defended the title in 2015, New Zealand has dominated rugby over the last decade. The team became the first in RWC history to win three times in total, as well as the first to successfully defend a title.

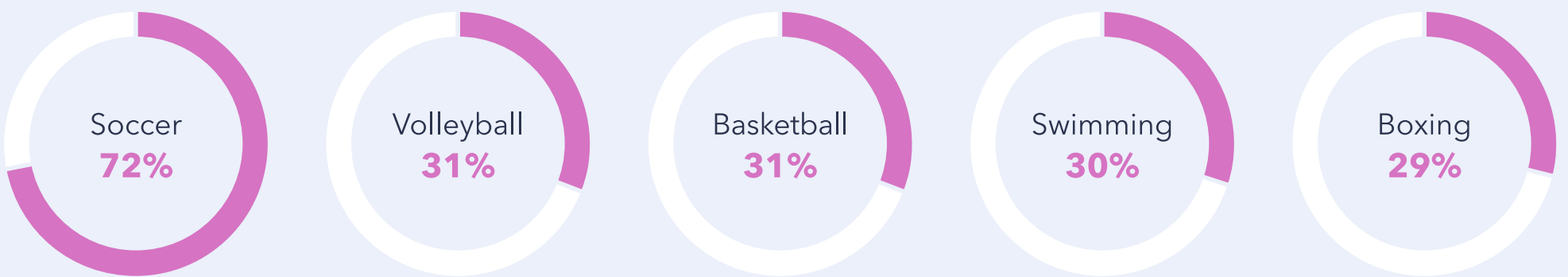
However, 34% of UK Rugby World Cup fans (those planning to watch most or all games) anticipated that England will knock off New Zealand from the top spot this year, compared to 30% of fans in the UK who thought New Zealand will triumph. It turns out, both were wrong; **only 9% of Rugby World Cup fans correctly predicted that South Africa would win the whole tournament.**



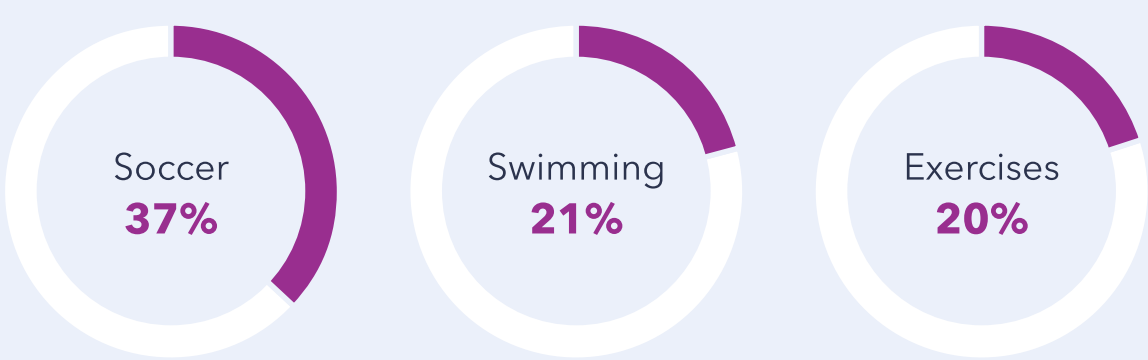
**Question:** Which of these sporting events/leagues do you regularly follow or have an interest in? Which of them do you watch regularly on broadcast TV or online?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 42,103 internet users in Europe aged 16-64

# Latin America

**MOST WATCHED SPORTS** | % who say they regularly watch the following on online or broadcast TV

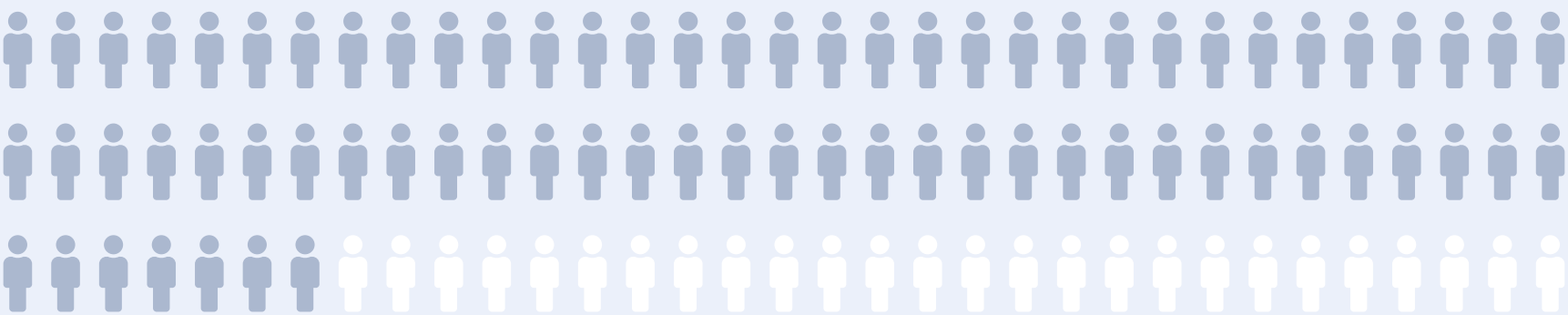


**MOST PLAYED SPORTS** | % who say they take part in...



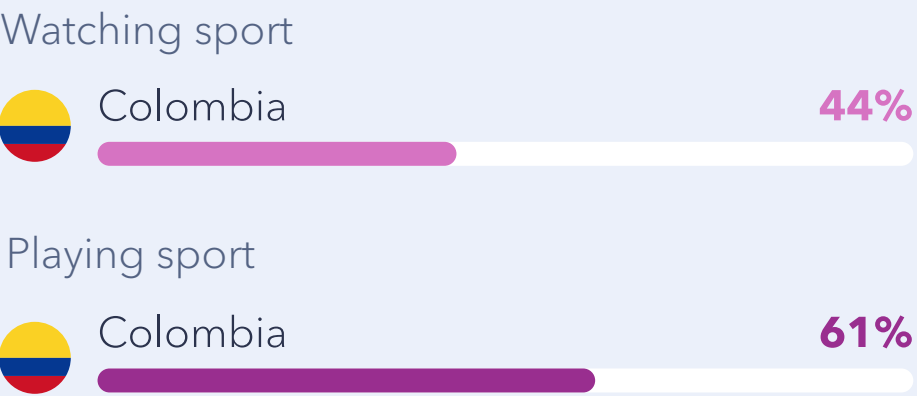
Perhaps more so than any other region, soccer is venerated in Latin America. **Almost three-quarters of all internet users aged 16-64 regularly watch soccer on online or broadcast TV**, a figure that remains consistent across all age groups. And this is not just male engagement; **more females regularly watch soccer in Latin America (62%) than males in APAC (58%) and North America (35%)**.

**73% do some form of exercise**











Volleyball comes second; consumers in LatAm are nearly twice as likely as the global average to watch this sport regularly. Volleyball is a prominent sporting tradition due to the climatically suitable conditions, especially in Brazil where 46% watch online or broadcast TV, the third highest engagement globally behind Thailand (52%) and the Philippines (46%).

**COUNTRY WITH HIGHEST INTEREST IN...**



**MOST DISTINCTIVE SPORT**

		INDEX
 Rugby	 <b>Argentina</b>	<b>3.12</b>
 Volleyball	 <b>Brazil</b>	<b>2.86</b>
 Cycling	 <b>Colombia</b>	<b>2.48</b>
 American football	 <b>Mexico</b>	<b>3.28</b>

**73% of 55-64s in LatAm regularly watch soccer**

Mixed martial arts (MMA) is another sport with great potential in this region – **31% of males watch martial arts regularly on online or broadcast TV, as do 1 in 5 women**. Much of Latin America is considered a crucial destination in the minds of the promoters and television executives seeking new markets for MMA. With the UFC pushing into markets like Chile, Argentina, and Uruguay, the competition to secure premium talent in the region has only intensified, especially after the **meteoric rise** of Amanda Nunes.



**Questions:** Which of these sports/sporting activities do you regularly play or take part in? Which of them do you regularly follow, watch or have any interest in? And which of them do you regularly watch on broadcast TV, watch online, or watch/attend in person? Which of these things are you interested in?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 5,967 internet users in Latin America aged 16-64

# Latin America

## MOST WATCHED LEAGUES AND COMPETITIONS

% who regularly follow or watch the following events/leagues



Those in the Latin American region tend to be extremely engaged with online media; compared to the other four regions, they typically spend the most time online on their devices, and over-index for the vast majority of global leagues and sporting events. For example, **they are twice as likely as the global average to watch professional boxing, UFC, and NASCAR, and 1.5x more likely to watch the FIFA World Cup, UEFA Champions League, Formula 1, and LaLiga.**

In addition to being avid fans of global competitions, there is a diehard attitude to local leagues. **As the third most watched event or league, coming ahead of the Champions League and the Winter Olympics, the Copa Libertadores is followed by 41% of consumers here.** This engagement increases with age, with half of 55-64s watching the annual competition. Similarly, in Brazil, 47% watch the Campeonato Brasileiro Serie A, rising to 60% when looking at our oldest consumers. This is a distinctly Latin American trend - La Liga in Spain and the Premier League in the UK do not see this rise in engagement with age, but rather have more stable figures across age groups.

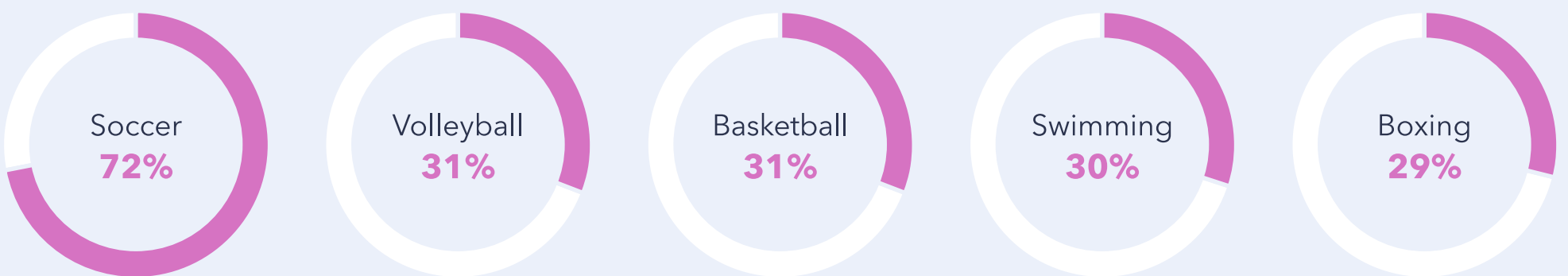
\*Missing indexes are for events/leagues asked to selected markets only



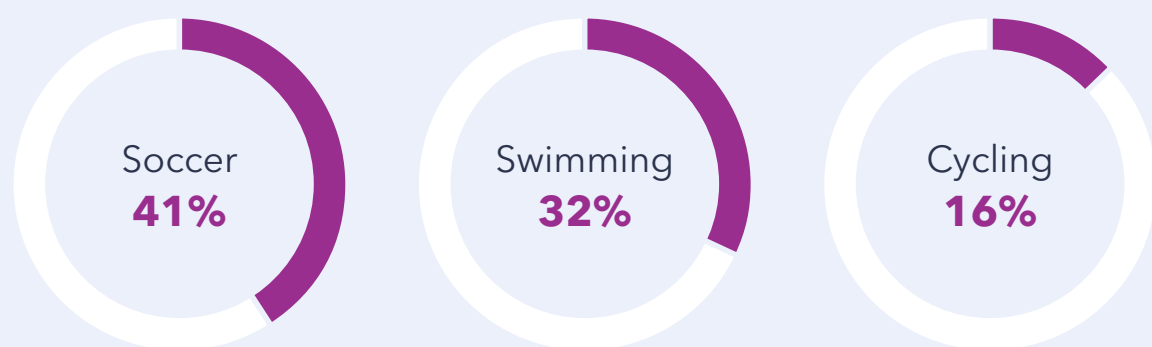
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# Middle East & Africa

MOST WATCHED SPORTS | % who say they regularly watch the following on online or broadcast TV

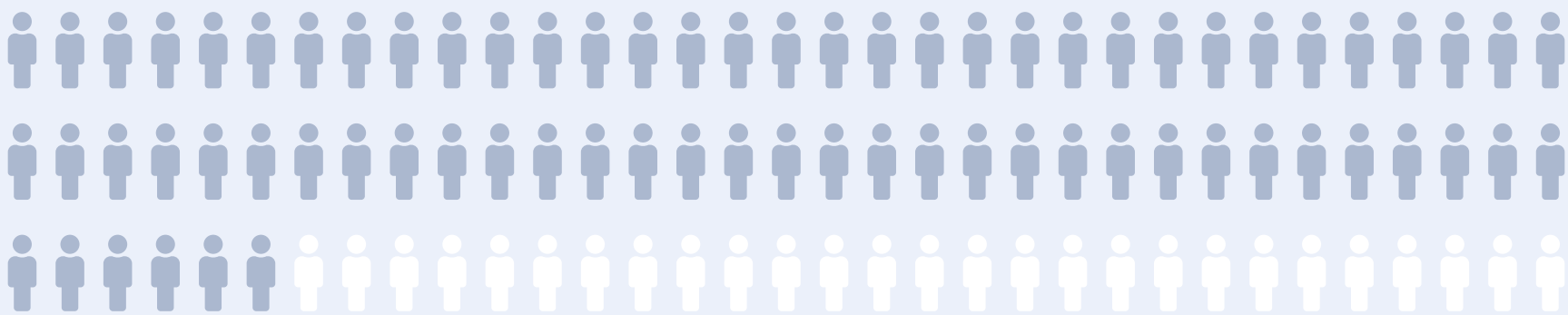


MOST PLAYED SPORTS | % who say they take part in...



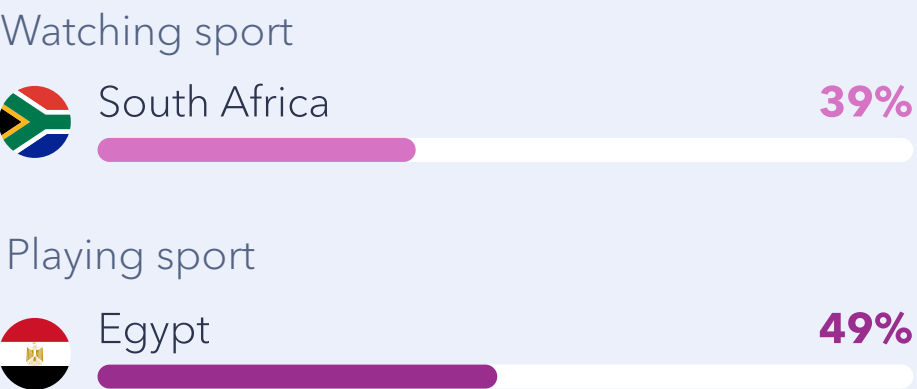
Mixing huge investment and ambition, the Middle East’s influence on global sport over the past decade has been well-documented. Through high-profile sponsorship deals, significant investment in sports properties, successful bids for major events, and growing sway in world sport’s corridors of power, nations like the United Arab Emirates and Qatar have transformed themselves into significant global players. Of those major events, the 2022 FIFA World Cup inevitably stands out, but Qatar also staged the 2019 World Athletics Championships and will host the 2023 World Aquatics Championships.

## 72% do some form of exercise








Soccer dominates in the Middle East and Africa – 72% of internet users watch the sport regularly, 1.3x more likely than the global average. Within the region you’ve got 500 professional teams – and in some of those markets the local soccer league is extremely popular. That tends to be the case in the most populous countries – Egypt and Saudi Arabia, for example, are two really strong consumer markets. 76% in Egypt and 71% in Saudi Arabia watch soccer and are passionate about their local team, making them very attractive to sponsors. There’s a real sports sponsorship economy in those countries and the domestic league is more popular than the international leagues. In Egypt, for example, 48% watch the Egyptian Premier League, coming ahead of the Premier League (48%), the Summer Olympics (40%), and LaLiga (35%).

COUNTRY WITH HIGHEST INTEREST IN...



MOST DISTINCTIVE SPORT

		INDEX
 Squash	 Egypt	2.80
 Horse-riding	 Saudi Arabia	2.57
 Rugby	 South Africa	7.87
 Cricket	 UAE	1.92

4 in 10 in MEA play soccer, the highest of any region

Consumers here are also 1.3x more likely to regularly watch athletics. This has been a landmark few months for Kenyan athletics in particular. First, Eliud Kipchoge became the first athlete to break the two-hour mark over a marathon distance, and then Brigid Kosgei smashed Paula Radcliffe’s women’s world record. At the World Athletics Championships staged in the Middle East for the first time, 9 African countries made it to the medals table, with Kenya’s 5 gold medals earning it second place in the world, just behind leaders the United States.



Questions: Which of these sports/sporting activities do you regularly play or take part in? Which of them do you regularly follow, watch or have any interest in? And which of them do you regularly watch on broadcast TV, watch online, or watch/attend in person? Which of these things are you interested in? Source: GlobalWebIndex Q2 2019 Base: 4,331 internet users in MEA aged 16-64

# Middle East & Africa

Many annual sports events and competitions have the highest engagement in this region, both on linear TV and online. This is especially the case for soccer. **Over half of respondents in MEA say they watch or follow the UEFA Champions League, compared to 47% in Latin America and 39% in Europe - regions that tend to be most affiliated with a love of soccer.** These differences are starker for just online TV viewing - 1 in 5 watch the Champions League online in MEA compared to 13% in LatAm and 12% in Europe.

And MEA’s favorite club to support? Liverpool. **Internet users in the Middle East and Africa are more than twice as likely to support the Champions League winners, with 44% saying they have some level of support or interest for the club.** Compare this to the UK, where only 17% support or are interested in them, and you can see the level of support present in the region.

**Brands are starting to take heed of the Middle East and Africa.** At its first TwitterFronts event for the MEA region, Twitter **unveiled** over 16 premium video content collaborations across sports, entertainment, and news. These partnerships include exclusive shows with Bein Sports, Formula One, and Goal DAZN. La Liga has also had an aggressive **social media strategy** in MEA, including using Telegram to access the soccer-mad under-30s among Iran’s 70 million-strong population. These partnerships indicate that there is still enormous growth for sports leagues, teams, and sponsors to engage with new audiences and markets.

## MOST WATCHED LEAGUES AND COMPETITIONS

% who regularly follow or watch the following events/leagues

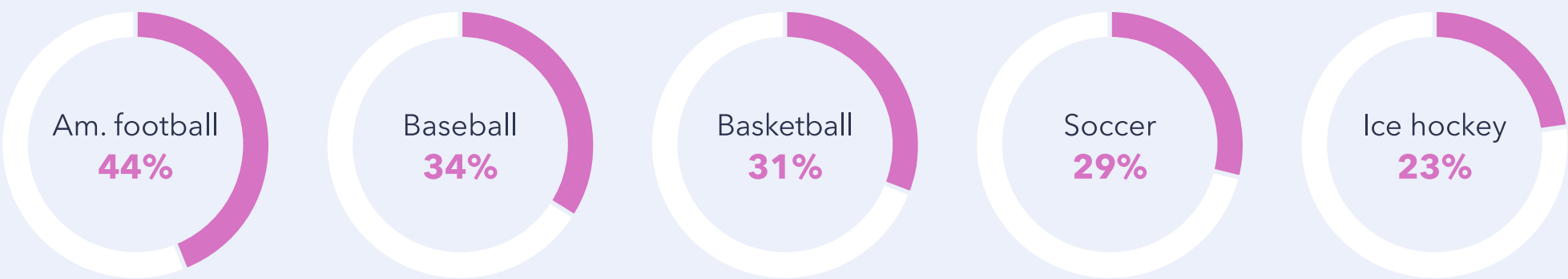


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# North America

**MOST WATCHED SPORTS** | % who say they regularly watch the following on online or broadcast TV

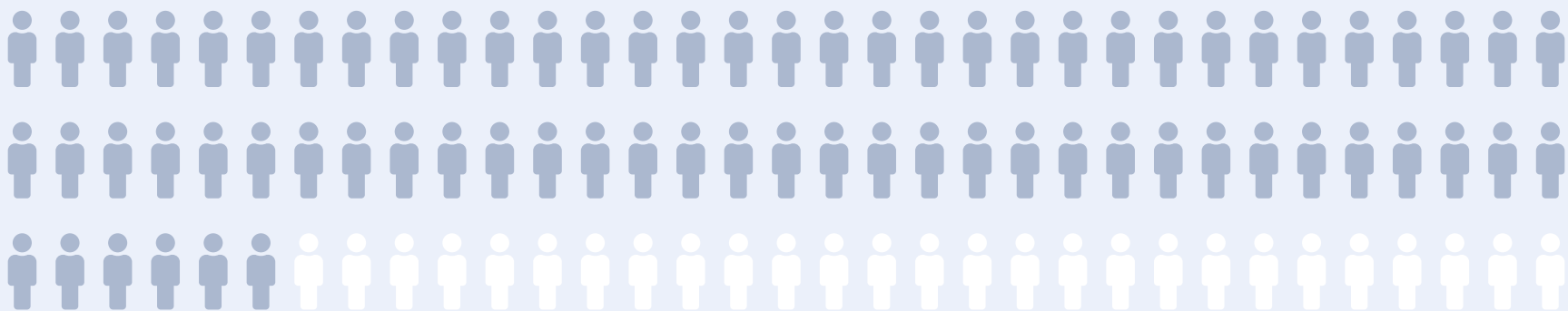


**MOST PLAYED SPORTS** | % who say they take part in...



American football is the clear stand out in North America, where **44% watch online or on broadcast TV**. Engagement for American football increases with age, peaking at 53% among 55-64s and dropping to 35% for 16-24s. Interestingly, there is quite an even split between male and female engagement (55% male, 45% female). **In fact, it is has a more equal ratio of male and female watchers than other popular sports such as athletics, baseball, basketball, soccer, and ice hockey.** Gymnastics has the largest female skew, with a 72:28 split.

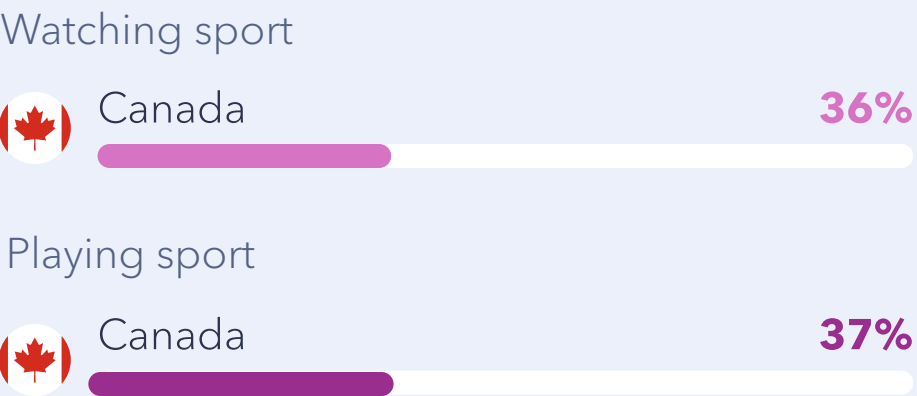
**72% do some form of exercise**






Soccer in North America is growing in popularity, now the **4th most popular sport watched online or on broadcast TV, and the fifth most played**. Among 16-24s, engagement figures are even higher and come ahead of sports that are ingrained in American culture, like baseball. Professional soccer is thriving in North America, especially after the success of the U.S. women’s soccer team’s success at the 2019 FIFA Women’s World Cup.

Viewing figures for the Major League Soccer (MLS) are still relatively low at 8%, but a major contributor to the continued **growth of soccer will be the presence of foreign clubs**. These clubs are expanding their influence and brand through academies, international offices, digital content, preseason friendlies, participation in the International Champions Cup (ICC), and major partnerships. Soccer giants like FC Barcelona and Bayern Munich have offices in New York City, while La Liga and the Bundesliga have an on-the-ground presence in the U.S.

**COUNTRY WITH HIGHEST INTEREST IN...**



**MOST DISTINCTIVE SPORT**

		INDEX
 Ice hockey	 <b>Canada</b>	<b>5.47</b>
 American football	 <b>USA</b>	<b>4.32</b>

Consumers in North America are **1.5x more likely than the global average to say they watch none of the 32 sports we track**



**Questions:** Which of these sports/sporting activities do you regularly play or take part in? Which of them do you regularly follow, watch or have any interest in? And which of them do you regularly watch on broadcast TV, watch online, or watch/attend in person? Which of these things are you interested in?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 25,066 internet users in North America aged 16-64

# North America

## MOST WATCHED LEAGUES AND COMPETITIONS

% who regularly follow or watch the following events/leagues



Examining the different followings of major sports leagues on a global scale reveals interesting differences in their fanbases. In North America, these differences are very prominent when comparing the two most popular leagues – the NFL and the NBA. **The NFL is still followed by more North American 16-24-year-olds than the NBA, but the difference is gradually decreasing, with just a three percentage-point difference between the two leagues.** Compare this to 55-64s, and the NFL dominates engagement, with a substantial 28 percentage-point lead over the NBA.

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, Odell Beckham Jr., and J.J Watt – tend to be older or less well-known globally. 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 sporting teams that share their ideals.**

**The NBA are also starting to expand their gambling footprint** amidst a seven-figure **partnership** with sports book William Hill, a little over a year after the Supreme Court in the U.S. overturned the Professional and Amateur Sports Protection Act (PASPA). William Hill join MGM Resorts, FanDuel, and The Stars Group as official partners.

**High speed cameras and data transparency have set the NBA for gaming and gambling, both of which NBA fans over-index for.** They are 1.5x more likely than the average internet user to cite gaming as an interest, and 1.4x more likely to show an interest in gambling. This looks to be a very financially smart decision from the NBA, attracting a new and growing sports gambling market.

For more information on this topic, see our **Sports Betting in the U.S.** report






\*Missing indexes are for events/leagues asked to selected markets only



**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 Q2 2019 **Base:** 25,066 internet users in North America aged 16-64

# Women’s Sport

WOMEN'S LEAGUES | % who say they follow or watch the following leagues/competitions

	APAC	Europe	Lat Am	MEA	North Am	16-24	25-34	35-44	45-54	55-64	Male	Female
 FIFA Women's World Cup	10.1%	10.0%	18.3%	7.0%	8.3%	10.1%	11.7%	10.6%	9.6%	10.1%	10.4%	10.8%
 ICC Women's World Cup	5.8%	0.6%	0.6%	3.8%	0.8%	5.5%	4.2%	3.5%	2.1%	1.5%	4.6%	3.0%
 ICC Women's World Twenty20	5.9%	0.6%	0.6%	3.4%	0.8%	5.2%	4.4%	3.5%	2.6%	1.3%	4.6%	3.0%
 UEFA Women's Champions League	6.6%	7.2%	10.0%	5.4%	2.9%	6.0%	8.2%	6.9%	5.5%	4.6%	6.8%	6.4%
 Women's World Cup	0.1%	1.4%	0.2%	1.4%	0.8%	0.3%	0.4%	0.4%	0.5%	0.9%	0.5%	0.4%

## While 88% of males in Vietnam regularly watch soccer, this only drops to 82% for females, which is the smallest difference across all markets

**Women’s sporting events continue to break through the glass ceiling.** The BBC [saw](#) a record-breaking 28.1m people watching the coverage of the Women’s World Cup on television and online, a figure that was more than double that for the last World Cup in Canada (12.4m). To make these figures even more impressive, peak TV audience for the England Rugby World Cup semi-final against New Zealand was 9.8m compared to 11.7m watching the England women World Cup semi-final. Despite different kick-off times, it shows the significant draw female sports, and large-scale female soccer events in particular, can have.

And that is translating into bigger prize money. Pound for pound, the WTA Finals in Shenzhen is one of the most lucrative tennis events in history, men’s or women’s. The total prize money stands at \$14m, far outstripping the \$8m on offer by the ATP’s equivalent event at the O<sub>2</sub> Arena in London. If undefeated, the champion will take home \$4.725m compared with the record \$3.8m pocketing by the U.S. Open champions this year.

When breaking down engagement figures for the five Women’s sporting events and leagues we currently track, there are prominent regional differences. **The FIFA Women’s World Cup is the one event that tends to have consistent viewing figures worldwide, although does increase to 18% in Latin America, which also has high engagement for the UEFA Women’s Champions League.** The International Cricket Council (ICC) Women’s World Cup and ICC Women’s World Twenty20, on the other hand, are most popular among consumers in APAC and MEA.

What is noteworthy is the fact that, in general, we don’t see a stark drop off for older audiences. **For example, the same percentage of 16-24s and 55-64s (10.1%) say they followed the FIFA Women’s World Cup either on online or broadcast TV.**

For more information on this topic, please see our [Women’s Sport](#) report.



**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 Q2 2019 **Base:** 115,963 internet users aged 16-64

03

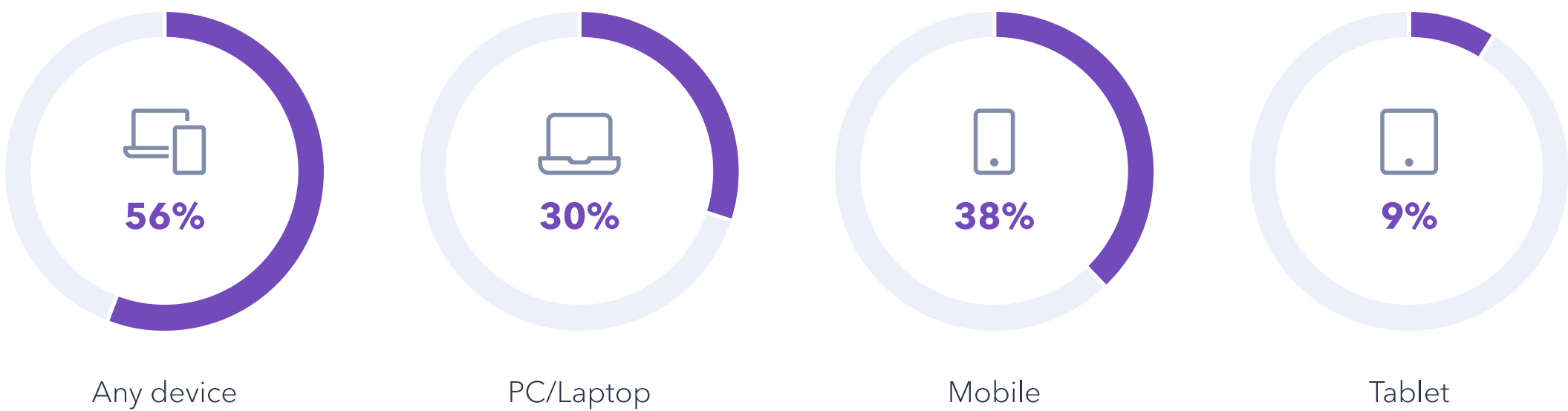
Sports Around the World

# Sports Viewing

# Sport On-The-Go

SPORTS HIGHLIGHTS

% who have watched sports coverage or highlights online in the last month on the following devices



Live sport is one of the few types of content viewers will set aside time to view in real-time, and broadcast TV remains the key medium for this live experience. However, in our [Sports Media Landscape](#) report, we outlined the tug of war between broadcast and online TV. Less mentioned was the growing centrality of the smartphone for sports consumption.

**In 3 out of 5 regions, sports viewing on mobile has actually overtaken PCs/laptops, and the other regions are not far behind**

**For watching sports coverage or highlights online, 38% of internet users have used their mobile, compared to only 30% using laptops/PCs.** Since 2017, mobiles have seen consistent increases in all regions but North America for watching sports content. **Growing data coverage, quicker download speeds, and improved screen resolution mean mobiles will soon become a very accessible way to watch live sport, along with the in-game coverage and analysis that social media facilitates so well.** The mobile will therefore become this hub for all things sport, and it is up to broadcasters to ensure the mobile-viewing experience harnesses this omni-channel experience of sports consumption.

“ We’re revolutionizing the way football fans stream Thursday Night Football and allowing Prime members to personalize how they watch and hear the game. There’s something for every football fan – from deeper gameplay analytics at their fingertips, to differentiated commentary, to the ability to easily discover and watch on any device, anywhere in the world.

– *Marie Donoghue, vice president of Amazon’s Prime Video Sports*

Amazon Prime Video’s [customizable features](#) on its streaming broadcasts of NFL “Thursday Night Football” is a great example of the integration of live-play and real-time insight. With the new functionalities, fans will be able to use Prime Video’s “X-Ray” feature to access “Next Gen Stats” such as a running back’s yards-after-contact. The company [plans](#) to roll out more statistics as the season progresses to help fans understand the action, and could be an indicator as to how it looks to improve Premier League games with its exclusive screening of Boxing Day games.



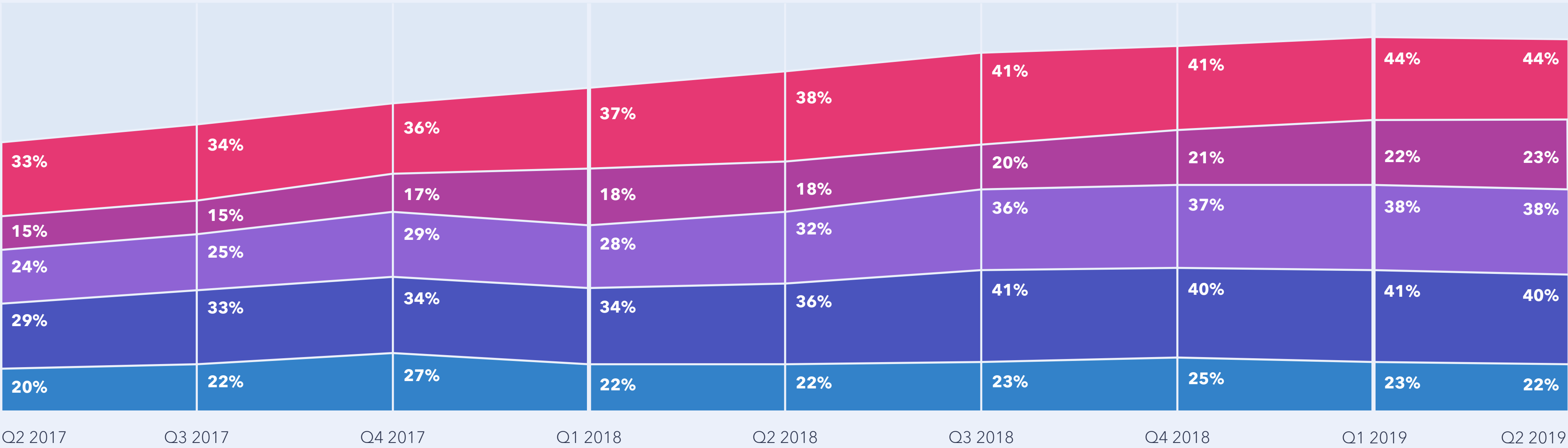
**Question:** In the past month, which of the following things have you done on the internet via any device?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 115,963 internet users aged 16-64

# Sport On-The-Go

MOBILE SPORT

% who have used their mobile to watch sports coverage or highlights online in the last month

● Asia Pacific ● Europe ● Latin America ● Middle East and Africa ● North America



**Question:** In the past month, which of the following things have you done on the internet via any device?  
**Source:** GlobalWebIndex Q2 2017 – Q2 2019  
**Base:** 230,610 (2017), 391,130 (2018) and 230,936 (2019) internet users aged 16-64

# The 5G Revolution



**Out of all 32 NFL teams we track, Jacksonville Jaguar fans (71%) are the most likely to say having the latest tech products is important to them; Pittsburgh Steelers fans (54%) are the least likely**

**25% of consumers in MEA have used a sports app in the last month, compared to 16% in North America**

The rollout of 5G technology across the world is promising to transform fan engagement, offering rights-holders new ways to monetize their assets, and presenting brands with the opportunity to become part of a team's fabric by associating themselves with in-stadium activities rather than traditional sponsorship forms.

The U.S. leads the way for innovative in-stadia entertainment, with the NFL, NBA, and MLB putting fans at the heart of the action and interacting with live attendees via apps and special perks. Approximately half of the NFL teams are currently deploying 5G in some capacity, but it remains in the early stages and often only certain parts of the venues can access the network. In Europe, German Bundesliga club VfL Wolfsburg is setting the trend. Currently in the process of trialling their 5G, Wolfsburg is focused on fan engagement by providing them with in-game features such as enhanced match statistics and player performance data.

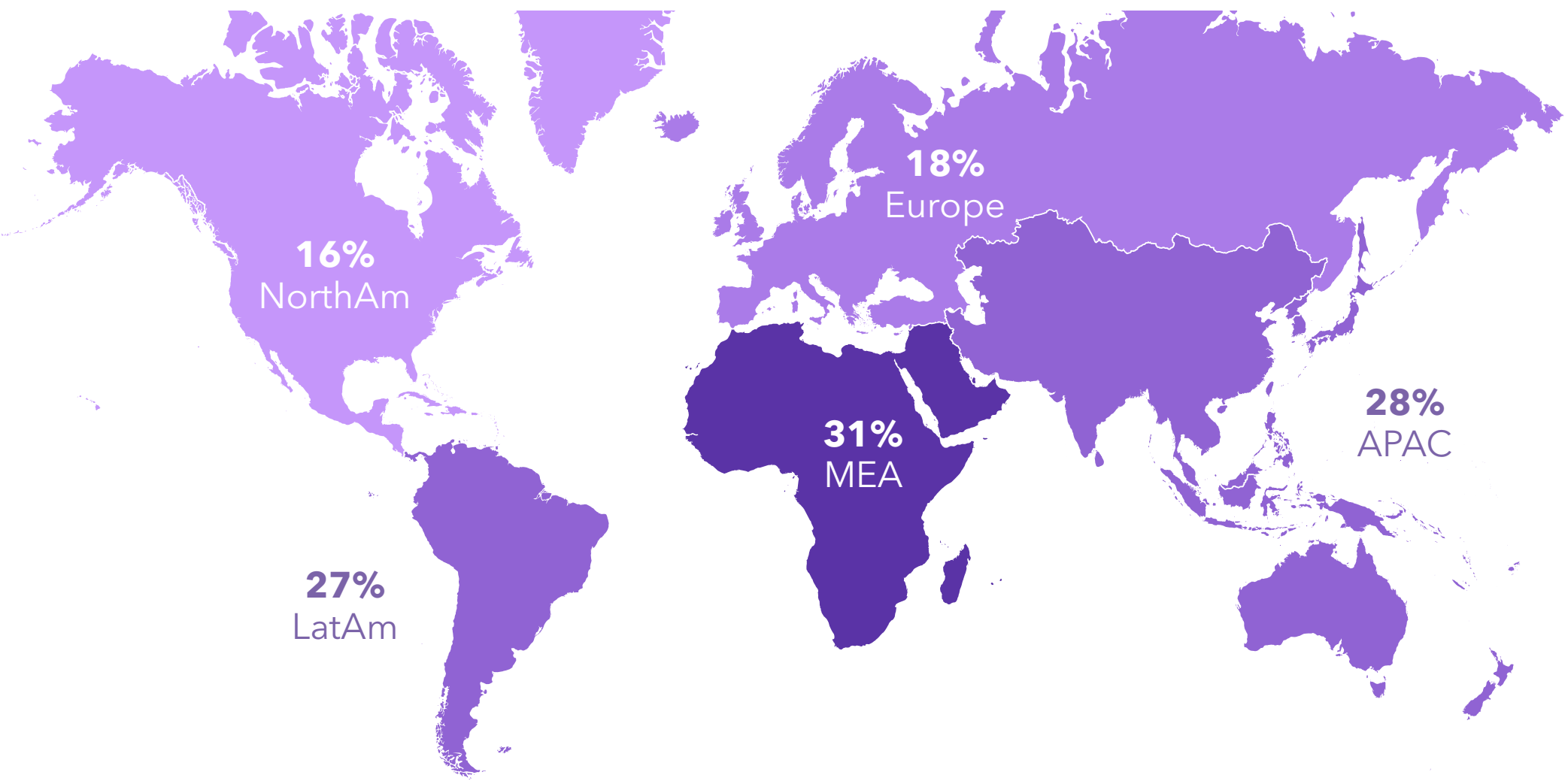
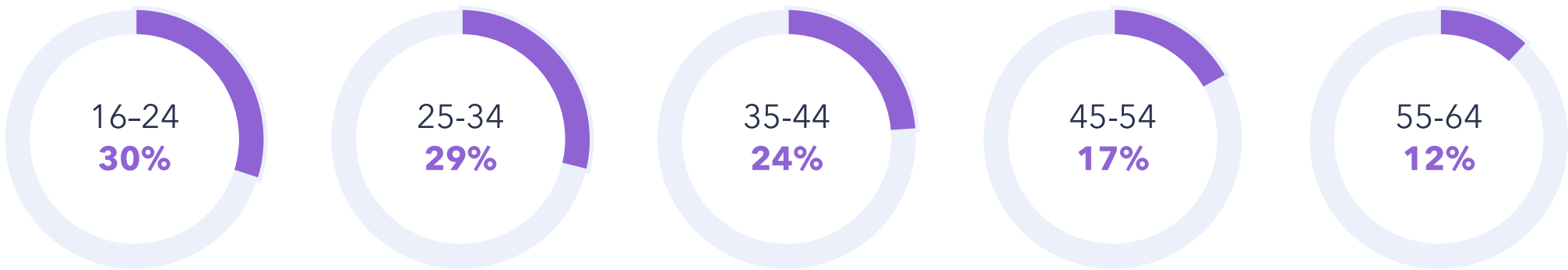
With broadcast and over-the-top media providers giving fans at home in-depth coverage of every aspect of the matchday, teams need to give spectators a reason to attend the match; and 5G will undoubtedly work alongside virtual reality and augmented reality to add value to the overall fan experience. As well as offering fans real-time replays and other live match incentives, 5G could also provide spectators with information and data that improves their experience around the game.

# Sport Stars

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, a quarter of internet consumers follow sports stars, rising to 44% among those who have expressed an interest in watching sport. And it’s a profitable business for the biggest stars.**

Given his relative lack of fame in the United States, Cristiano Ronaldo’s earnings on Instagram are staggering. According to an analysis by [Buzz Bingo](#), he’s made approximately \$47.8 million this year via paid Instagram posts, more than any other user on earth and reportedly more than what he makes playing soccer (which is roughly \$34 million). Lucrative endorsement deals with Nike (where, along with LeBron James and Michael Jordan, Ronaldo has a lifetime deal), as well as Armani, Tag Huer, Egyptian Steel, EA Sports, PokerStars, and Castrol gives an idea as to the ubiquity of the CR7 brand.

**FOLLOWING SPORTS STARS**  
% who say they follow sports stars on social media



There’s fairly strong variation across the demographic groups for following sports stars. In particular we see that age has a strong impact across all regions: **16-24-year-olds are nearly 3x more likely than 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 most regions, although 55-64-year-olds in APAC are 1.5x more likely to follow sport stars on social media than the rest of their peers around the world.

At present, **1 in 5 sports fans say they find out about new brands or products via celebrity endorsements, making them 1.3x more likely to do so than the average internet user.** The impact of this form of brand promotion on our youngest consumers makes this particularly appealing; almost a quarter of 16-34-year-olds say they discover new brands via influencer marketing.

For more information about this topic, see our [Influencer Marketing](#) report.



**Question:** Who do you follow on social media?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 115,963 internet users aged 16-64

04

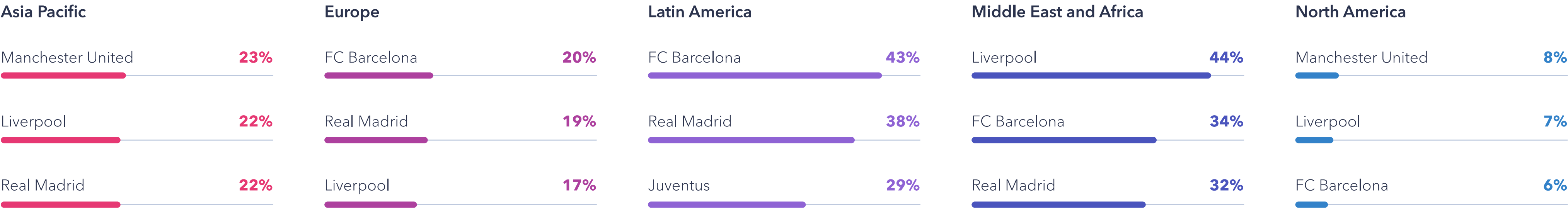
Sports Around the World

# Sports Sponsorships

# Most Popular Sports Teams Around the World

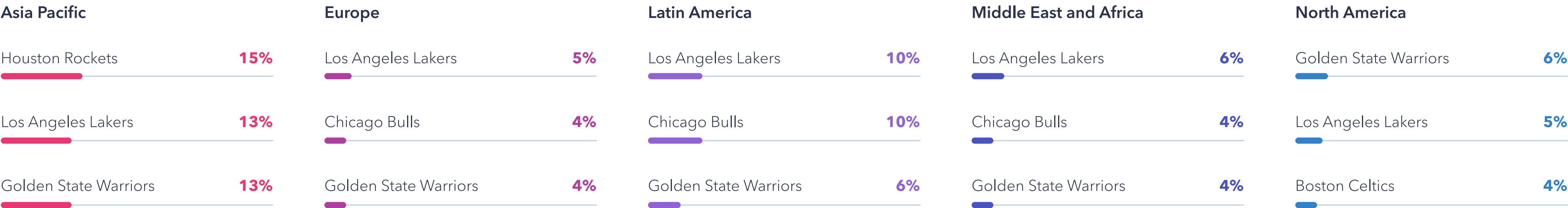
**SOCCER**

% who say they any support/interest for the following soccer clubs



**BASKETBALL**

% who say they follow these NBA teams

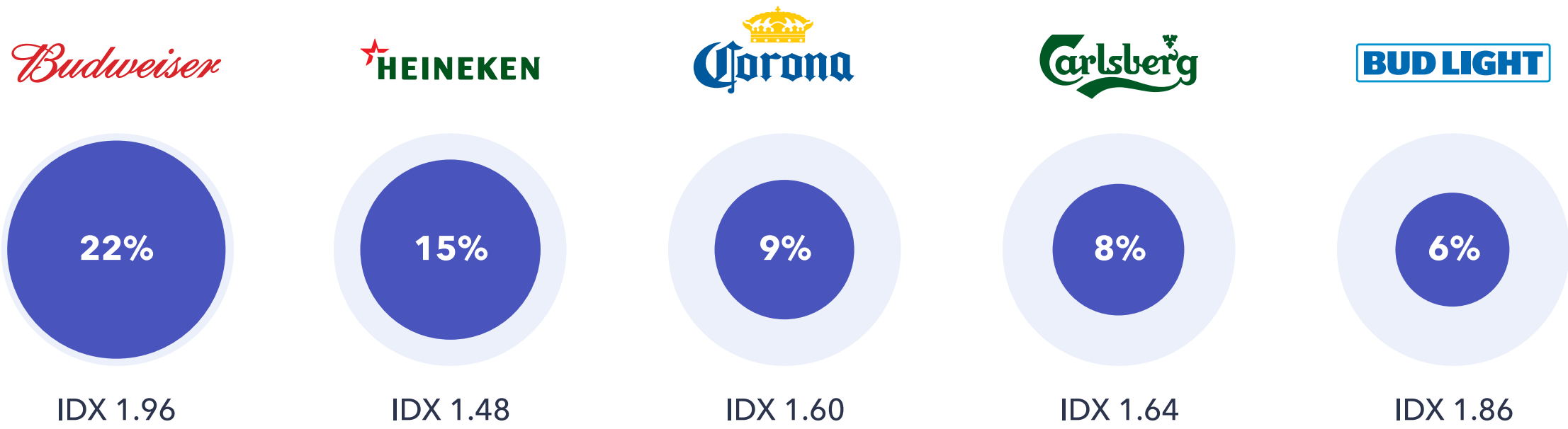


**Question:** Do you support, follow or have an interest in any of these teams?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 55,612 internet users aged 16-64

# AB InBev & the NBA

## NBA FANS' BEER PREFERENCES

% of NBA fans who have consumed the following beer brands in the last month



Sport has transitioned from a passive spectator sport to a highly participative one – fans want to be closer to the action, to the athletes, and to see the most revealing camera angles. Sponsoring a sports company can be one way to appeal to fans in this way and 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 couple of these partnerships here.

**AB 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 AB 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 also hit the headlines for rolling out a new sponsorship model, built on incentives for performance on the field or pitch, and off it too. Every AB 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.

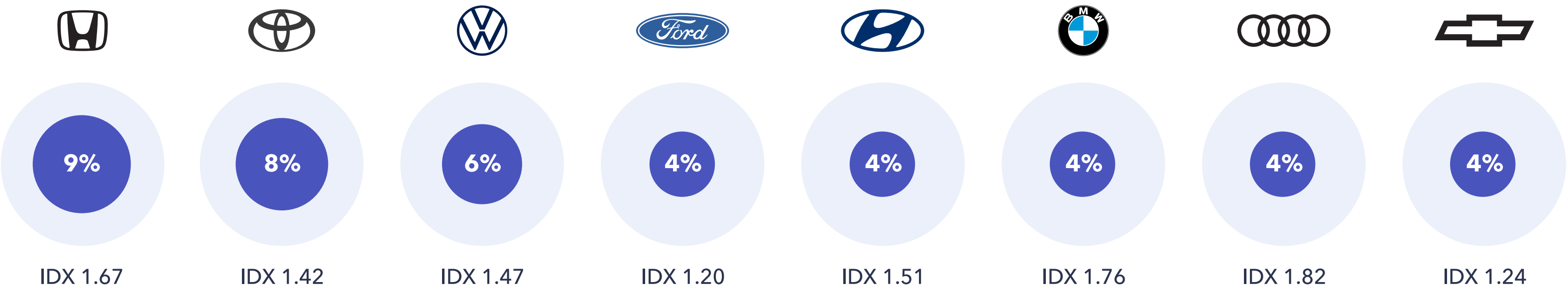
This long relationship seems to have had an impact on NBA Fans’ beer preferences. When we ask them which brands they drink each month, it’s Budweiser that comes out top. **22% of fans are drinking the brand on a monthly basis, giving it a seven-point lead over second-placed Heineken.** It’s also promising that Bud Light makes the top five brands, with NBA fans 1.86x more likely than the global average to have consumed Bud Light in the last month.



**Question:** When did you last drink these alcohol brands?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 16,786 NBA fans aged 16-64

# Manchester United & Chevrolet

**AUTOMOTIVE ADVOCACY AMONG MANCHESTER UNITED FANS**  
% of Manchester United fans who would advocate the following brands to others



Manchester United is consistently named as the top club in Europe's biggest leagues in terms of sponsorship revenue. United's shirt sponsor deal with Chevrolet is the car brand's only soccer deal - where it receives around \$65 million a year on top of the \$107 million from Adidas. There's potential, however, for Chevrolet to make more of an impact among Manchester United fans. **Among this group, the car brand comes eighth both in terms of current ownership and brand advocacy.** Since Manchester United fans are 1.4x 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.

Time may be running out, though, as Manchester United seems to be in the process of looking at a new, big-money shirt sponsorship. Chevrolet's sponsorship ends in 2021, and it remains to be seen whether this deal will be extended with other leading brands still interested in the brand given it's just announced record revenues of over \$800 million in September.

One brand partnership involving the automotive industry that could prove to be more successful is the one between BMW and Cloud9, perhaps the largest esports organizations in the world. Our data indicates that **esports fans are 1.8x more likely than the average internet user to currently own a BMW, and twice as likely to advocate the BMW brand to others.**



**Question:** Which of these brands would you advocate to others?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 6,553 Manchester United fans aged 16-64

# Notes on Methodology

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 575,000 internet users aged 16-64 across 46 markets. 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 Q2 2019** wave of research across 45 countries, with a global sample of 139,658 respondents.

Argentina	1,573	Netherlands	1,324
Australia	4,038	New Zealand	1,280
Austria	1,289	Nigeria	1,099
Belgium	1,274	Philippines	1,664
Brazil	2,366	Poland	1,850
Canada	2,274	Portugal	1,292
China	15,350	Romania	1,318
Colombia	1,314	Russia	2,157
Denmark	1,264	Saudi Arabia	1,413
Egypt	1,770	Singapore	2,718
France	5,035	South Africa	1,508
Germany	5,055	South Korea	1,287
Ghana	990	Spain	5,070
Hong Kong	1,829	Sweden	1,302
India	7,587	Switzerland	1,289
Indonesia	1,939	Taiwan	1,790
Ireland	1,260	Thailand	1,602
Italy	5,185	Turkey	1,513
Japan	1,804	UAE	1,727
Kenya	1,024	UK	10,102
Malaysia	1,536	U.S.A.	25,092
Mexico	2,633	Vietnam	1,573
Morocco	1,038		

# Notes on Methodology

## INTERNET PENETRATION RATES 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 2019. 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.

## 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 GWI’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](#).

## INTERNET PENETRATION RATES

Table below refers to the total population in each market

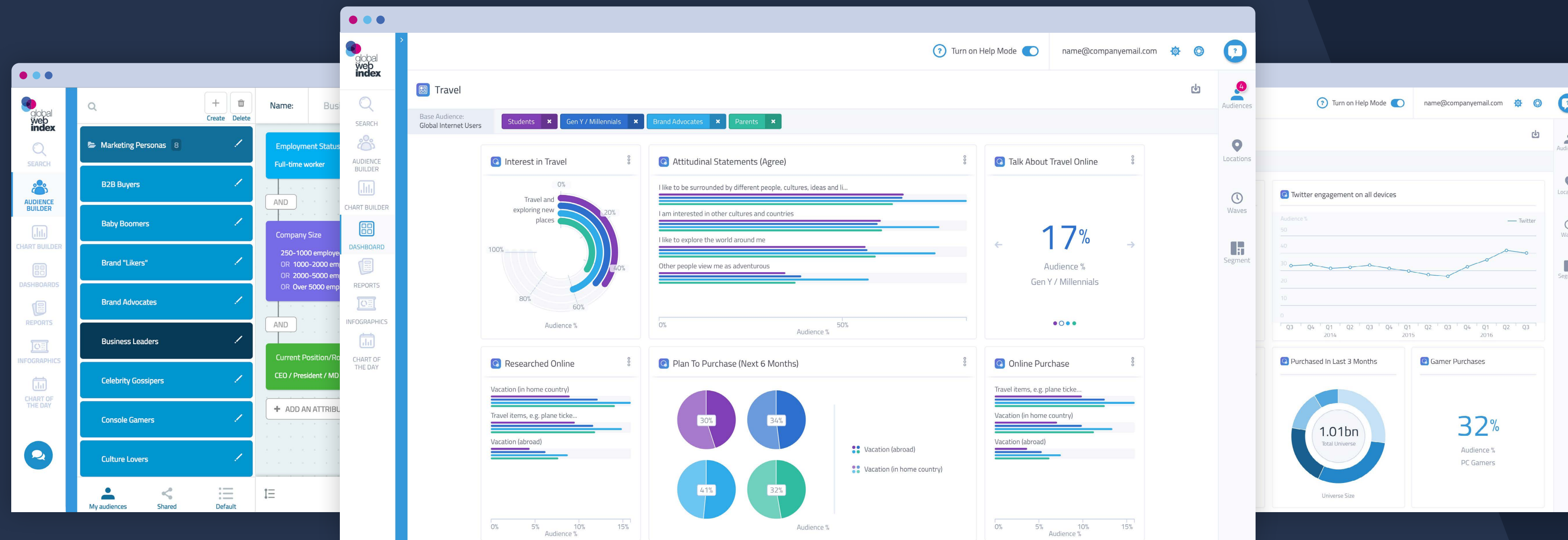
Argentina	78%	Netherlands	93%
Australia	88%	New Zealand	93%
Austria	88%	Nigeria	36%
Belgium	89%	Philippines	64%
Brazil	71%	Poland	79%
Canada	94%	Portugal	78%
China	59%	Romania	72%
Colombia	66%	Russia	80%
Denmark	97%	Saudi Arabia	83%
Egypt	54%	Singapore	85%
France	85%	South Africa	62%
Germany	88%	South Korea	95%
Ghana	48%	Spain	87%
Hong Kong	91%	Sweden	96%
India	42%	Switzerland	96%
Indonesia	39%	Taiwan	83%
Ireland	87%	Thailand	58%
Italy	62%	Turkey	71%
Japan	92%	UAE	95%
Kenya	43%	UK	96%
Malaysia	83%	USA	80%
Mexico	69%	Vietnam	55%
Morocco	69%		



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