

Spectator Sports - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Live streaming shows growing potential to open spectator sports to a wider range of demographics, while stadium operators can turn to good old-fashioned atmosphere to help event attendance stand out from the leisure crowd.”

– **David Walmsley, Senior Leisure Analyst**

This report looks at the following areas:

- **Going back to basics helps stadiums stay ahead of screens**
- **Live streams and television – opportunity or threat?**

The UK’s status as a leading major event host continues to help boost attendances and raise the profile of spectator sport, but market value remains driven primarily by the domestic football segment.

The growth of online streaming services has strong potential to expand access to live sport across a wider range of demographics than at present, while event attendance has an opportunity to differentiate itself from other leisure options by cultivating the atmospheric and experiential qualities at the core of its spectator appeal.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Spectator Sports - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Covered in this Report

Executive Summary

The market

Football drives up market value

Figure 1: Forecast of consumer expenditure on sports event tickets, 2012-22

Crowd numbers strong and rising

Figure 2: UK spectator sports attendances, by leading segments, 2015-16

Streaming's rising tide

Figure 3: Most-streamed television sports programmes, 2016

The consumer

Two thirds of adults watch live sport

Figure 4: Experience of live sport, August 2017

Tennis a strong second seed behind football favourite

Figure 5: Sports watched live, August 2017

Television for reach, mobile for depth

Figure 6: Methods of watching live sport, August 2017

The ultimate loyalty scheme

Figure 7: Frequency of watching live sport, August 2017

There's nothing like being there

Figure 8: Appeal of live event attendance, August 2017

Big savings from small screens

Figure 9: Appeal of live sports broadcasts, August 2017

What we think

Issues and Insights

Going back to basics helps stadiums stay ahead of screens

The facts

The implications

Live streams and television – opportunity or threat?

The facts

The implications

The Market – What You Need to Know

Football drives up market value

Crowd numbers strong and rising

Targets for ticketing led by value and cost

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Spectator Sports - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Streaming's rising tide

New formats to draw new crowds

Market Size and Forecast

Football up front as market kicks on

Figure 10: Consumer expenditure on sports event tickets, 2012-22

Forecast

Figure 11: Forecast of consumer expenditure on sports event tickets, 2012-22

Forecast methodology

Market Segmentation

Crowd numbers strong and rising

Figure 12: UK spectator sport attendances, by leading segments, 2014-16

Football

Figure 13: English league football attendances, 2012/13-2016/17

Figure 14: English league football attendances, by division, 2012/13-2016/17

Horseracing

Figure 15: Horseracing attendances, 2013-17

Cricket

Figure 16: International and first-class cricket attendances, 2013-17

Rugby union

Figure 17: Premiership rugby union attendances, 2012/13-2016/17

Rugby league

Figure 18: Super League attendances, 2013-17

Tennis

Figure 19: UK tennis tournament attendances, 2013-17

Figure 20: UK tennis attendances, by tournament, 2013-17

Golf

Figure 21: Major UK golf tournament attendances, 2013-17

Market Drivers

Cost and value frame ticket pricing debate

Figure 22: Highest and lowest ticket prices at selected UK sports events, 2017

More investment in new facilities

Figure 23: English league football clubs' expenditure on stadia and other facilities, 2014/15-2015/16

Major events keep on coming

Figure 24: Major world and continental sports events to be staged in the UK, 2018-21

Streaming model holds water as TV audiences stagnate

Figure 25: Most-streamed television sports programmes, 2016

Artificial intelligence and virtual reality bring the stadium to the fans

Launch Activity and Innovation

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Spectator Sports - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

New formats seek new audiences
 Make the jersey your own
 Mobile ticketing opens new marketing channels
 Standing out from the crowd
 Making a date with long-distance lovers
 Big match experience

The Consumer – What You Need to Know

Two thirds of adults watch live sport
 Tennis a strong second seed behind football favourite
 Television for reach, mobile for depth
 Loyalty breeds commitment
 Oh, what an atmosphere!
 Big savings from the small screen

Sports Fans

Major events pull in the crowds
 Figure 26: Experience of live sport, August 2017
 New media experiences for those priced out of the stadium
 Figure 27: Experience of live sport, by gross household income and socio-economic status, August 2017

Most Popular Sports

Football and tennis make it a two-horse race
 Figure 28: Sports watched live, August 2017
 Youth versus experience
 Figure 29: Sports watched live, by age, August 2017

Experience of Live Sport

As seen on TV
 Figure 30: Methods of watching live sport, August 2017
 Social sport as family time
 Figure 31: Methods of watching live sport, by parental status, August 2017

Frequency of Watching

The ultimate loyalty scheme
 Figure 32: Frequency of watching live sport, August 2017
 Power of stadium and streaming beats reach of TV
 Figure 33: Frequency of watching live sport, by methods of watching live sport, August 2017

Promoting Event Attendance

There's nothing like being there
 Figure 34: Appeal of live event attendance, August 2017
 Authentic experiences to bridge the generation gap

**BUY THIS
 REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Spectator Sports - UK - October 2017

Report Price: £1995.00 | \$2672.70 | €2262.13

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 35: Appeal of live event attendance, August 2017

Attitudes towards Live Broadcast Sport

Cutting cords, cutting costs

Figure 36: Appeal of live sports broadcasting, August 2017

A confluence of online interests surfaces around the stream

Figure 37: Appeal of live sports broadcasting, by method of viewing, August 2017

Appendix

Data sources

Abbreviations

Fan chart forecast

Figure 38: Forecast of consumer expenditure on sports event tickets, 2017-22

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com