

# ATTITUDES TOWARDS SPECTATOR SPORTS – GERMANY – 2023

As participation in spectator sports is fairly low, providers can entice non-viewers through exciting, social viewing experiences (eg unique atmosphere in stadium; public viewing at pubs).



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# Attitudes Towards Spectator Sports – Germany – 2023

## This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on spectator sports
- Participation and methods of watching different types of sports live
- Expected behaviour changes as a result of the cost-of-living crisis
- Behaviour towards watching live sports with a focus on sustainability, human rights, value alignment and technological development
- Attitudes towards women's sports and planned participation in watching the 2023 Women's Football World Cup



As participation in spectator sports is fairly low, providers can entice non-viewers through exciting, social viewing experiences (eg unique atmosphere in stadium; public viewing at pubs).

## Overview

**34% of Germans** have watched live sports in the 12 months to March 2023. This is rather low compared to the UK where **74% of Britons** watched live sports in the 12 months to August 2022. At **48%**, German under-35s are most engaged in watching live sports, peaking among men aged 16-24 at **59%**.

While **49% of sports viewers** are not expecting to change their behaviour towards watching sports as a result of rising prices, **younger viewers**, as the most engaged, are most likely to do so. As younger age groups are more likely to spend money on various leisure activities, **they**

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**have to make choices about how to balance their spending, fueling competition across leisure providers.**

To keep up loyalty and compete with other leisure providers, **spectator sports brands need to adapt to younger consumers**; for instance, by touching up the sports clubs' image or mobile-friendly streaming services. Moreover, spectator sports brands can stand out with the unique atmosphere created by fans.

To make watching sports more appealing to non-viewers, German spectator sports brands can look to the UK, where **watching sports in pubs** likely contributes to high numbers of sports viewers as it offers socialising opportunities. As Germans also prioritise socialising, **this presents opportunities for German brands to target non-viewers** through social viewing offers.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five year outlook for spectator sports

### Market context

- Socialising is top of mind for Germans in tough economic times
- Experiences everywhere
- Sporting events as a platform for raising awareness of societal issues

### Opportunities

- Leverage social aspects to target non-watchers
- Invest in women's sport as the rising star
- Use opportunities to appeal to younger consumers
- Demonstrate value alignment towards human rights
- Quick download resources

## MARKET DRIVERS

### The German economy

- The cost-of-living crisis is holding back the post-COVID-19 recovery
  - Graph 1: key economic data, in real terms, 2019-24
- Inflation remains the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure

### The impact of the economy on spectator sports

- The return of live sports visitors
- Impact of financial confidence on event visits
  - Graph 2: concert/sporting event participation in the next/last three months and financial confidence, 2023
- Focus on Germans' spending priorities...
- ...and promote social aspects of spectator sports more strongly
  - Graph 3: spending behaviour, 2022
- COVID-19 still impacts younger generation

### Experience economy

- Germans' hunger for experiences spurs high competitions for leisure activities

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- Focus on fans as the key strength of in-person experiences
- Leverage technological advances to make watching live sports a customised and social experience

## Social and environmental responsibility

- Great attention comes with responsibility
- Brands need to help consumers to act sustainably
  - Graph 4: consumers who try to act in a way that is not harmful to the environment\*, 2022
- Minimise the effects of spectator sports on the environment

## Sports broadcasting

- The power of pay-TV subscriptions
  - Graph 5: paid-for video streaming services used to watch content on-demand in the last three months, 2022
- Fans suffer from the broad distribution of broadcasting rights

# WHAT CONSUMERS WANT AND WHY

## Live sports watched

- Spectator sports have a hard time in Germany
- Focus on socialising to target non-watchers
- Tap into different sports to engage women
- Focus on the most engaged viewers with cross-category promotions
- Football is the top dog
  - Graph 6: live sports watched, 2023
- Benefit from cross-selling of tickets
- Older Germans show a larger repertoire of sports watched
  - Graph 7: repertoire of types of live sports watched, by age, 2023
- Touching up the image of sports clubs is key to appeal to younger generations
- Choose the free-TV partner in line with the target group
- Successful teams drive spectator interest

## Methods of watching live sports

- Germans prefer big screens for watching sports
- Make sports broadcasting mobile-friendly
- Ice hockey and football are visitor magnets
  - Graph 8: methods of watching live sports, by type of sport, 2023
- Promote visiting sports events as an exciting experience with a focus on atmosphere
- Leverage paid-for video streaming services to broaden target audience

## Cost-of-living crisis

- Live sports viewers are keen to continue spending

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- Graph 9: expected behaviour changes as a result of the rising cost-of-living, 2023

- Live sports viewers are keen to continue spending money on sport
- Promote ways to save money whilst visiting sports events
- Demonstrate value for money to younger sports viewers

## Behaviour towards watching live sports

- Respect for human rights is top of mind for Germans
  - Graph 10: behaviour towards watching live sports, 2023
- Help event visitors to act more sustainably
- Show your values to help consumers identify with the brand
- Tap into exciting VR gadgets for watching sports at home
- Leverage the social aspects of sports events

## Women's sport

- Watching women's sport is popular among sports viewers
- Create more visibility for women's sports...
- ...and invest more strongly
- Leverage women's sport to target women and girls
- Promote women's sports in Germany to enhance awareness
  - Graph 11: attitudes towards women's sports, 2023
- Promoting excitement is key
- Appeal to women with a focus on equality

## LAUNCH ACTIVITY AND INNOVATION

- The NFL holds games in Germany
- NFTs are increasingly gaining a foothold in the sports market
- The metaverse offers limitless opportunities for individualisation of sports watching
- Sustainability and motorsport – an unequal pairing
- Football clubs are launching streetstyle collections

## Advertising and marketing activity

- WOW promotes value for money
- Telekom and Bayern München promote aligned values
- EHC Red Bull München focuses on the play-offs
- Excitement as a key element to promote sports events
- Telekom focusses on major sports events
- Heineken focuses on equality

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

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