SPORTS WHITEPAPER 2023

The Global Sports Media Landscape

What are the challenges and opportunities for sport in an evolving media landscape?

YouGov®

Inside

Introduction

How we engage and watch sport has changed dramatically. The proliferation of non-traditional media channels, amplified by digital adoption, has hugely changed the current sports media landscape. Sports rights holders, organizations and content producers all want to maximize their revenue potential, and many are exploring content formats and styles that can attract new audiences and align with their changing preferences and needs. Amidst a changing sports content ecosystem, getting to know how sports and media interact is crucial for modern marketers hoping to reach a highly engaged audience of passionate fans.

In this new report, YouGov sets out to understand how consumption of sports content is changing and how sports organizations need to adapt to keep up with changing media behavior. We explore the demand for live programming, and sports content relating to live events such as highlights, interviews, and announcements. We also assess the appetite for sports lifestyle focused content such as docuseries and behind the scenes documentaries. In addition, we examine the vast array of platforms and touchpoints that sports fans are connecting with, and highlight opportunities for rights holders and brands to attract new audiences and widen their fan base.

This report uses global research across a selection of 18 international markets in tandem with syndicated data from **YouGov Profiles, YouGov Global Fan Profiles, YouGov Signal** and **YouGov Safe.**

Please note, our samples in East Asian markets such as China, Hong Kong, and Singapore are not all nationally representative (with some being representative of the online or urban population; see data section for details).

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PART - 1

Consumption of sports content

Whatever the sport, nothing beats the excitement and thrill of watching your favorite team, sports person or country live in a stadium. However, the way we watch and engage with sport has changed dramatically, evolving from the stadium to the screen. Technological advances have created greater opportunities for sports fans to have control over their viewing experience, offering the flexibility to watch what and when they want. This in turn has generated more ways to monetize the industry than ever before and offer more touchpoints for fans to connect and engage with sport. So how is sports content being consumed across the globe, and what are the opportunities and challenges that the ever-changing media landscape affords to sport?

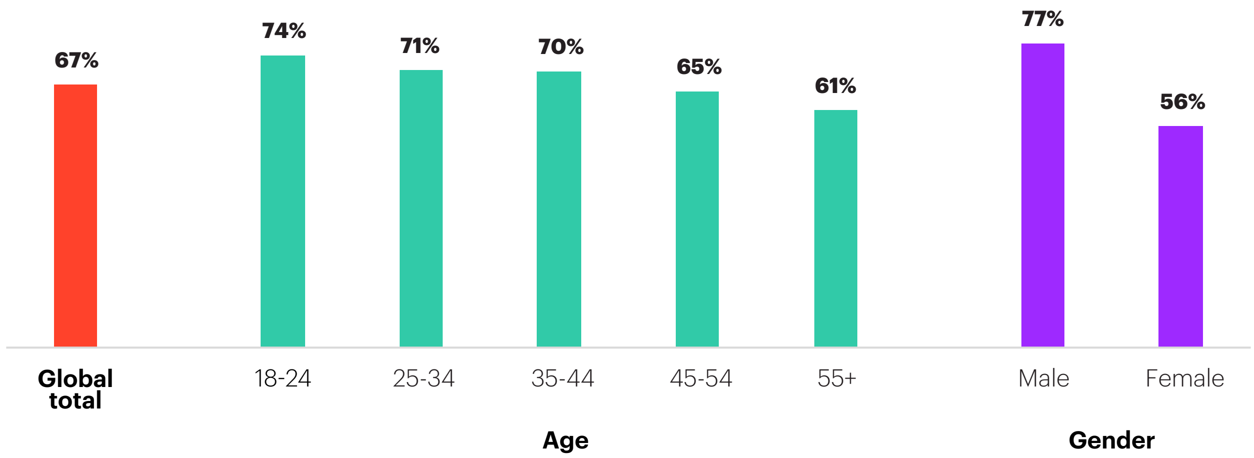
Global engagement with sports media is high

New YouGov data reveals that just over two thirds of global consumers **(67%)** follow sports on a regular basis via various media platforms. These Engaged Sports Fans are connecting with the sports they love across a range of traditional and digital media.

Males and younger audiences are most engaged

Looking at Engaged Sports Fans by demographics, more than three quarters of men **(77%)** are immersing themselves with sports content compared to **56%** of women. Engagement levels are higher among the under 45s peaking in the 18–24 year old age group **(74%)**.

Engaged Sports Fans by age and gender - Global



Q: Which, if any, of the following ways do you engage with the sports you regularly follow? (i.e., in the last 30 days). Based on % who are engaged with any of the media platforms listed.

Engaged Sports Fans definition: Consumers who engage with the sports they regularly follow (i.e., in the last 30 days) by any of the following media platforms or formats: Live sports on TV, Social media, Sports content in print or online, Non-live video online, Live streamed video content online (e.g., Twitch, YouTube), Live content on video streaming services (e.g., ESPN+, Amazon Prime, Hulu, Peacock), Non-live sports on a TV channel (e.g., Recorded, On-demand, Re-plays of games), Sports video games (e.g., Consoles, PC, mobile phones, or other handheld devices), Radio, Visiting team or league websites, Sports betting, Non-live content on video streaming services (e.g., Hard Knocks, Drive to Survive), Sports podcasts, Purchasing live events on Pay-Per-View, Other platforms/formats

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Sports content engagement

With an ever-changing media landscape, consumers have a plethora of options to engage with the sports they are passionate about. From watching on traditional linear television, to streaming services, or following on social media they can connect and interact with sports content anytime and anywhere.
This presents a variety of opportunities for sports teams, leagues, and organizations to build relationships with their fans through a range of media platforms and formats.

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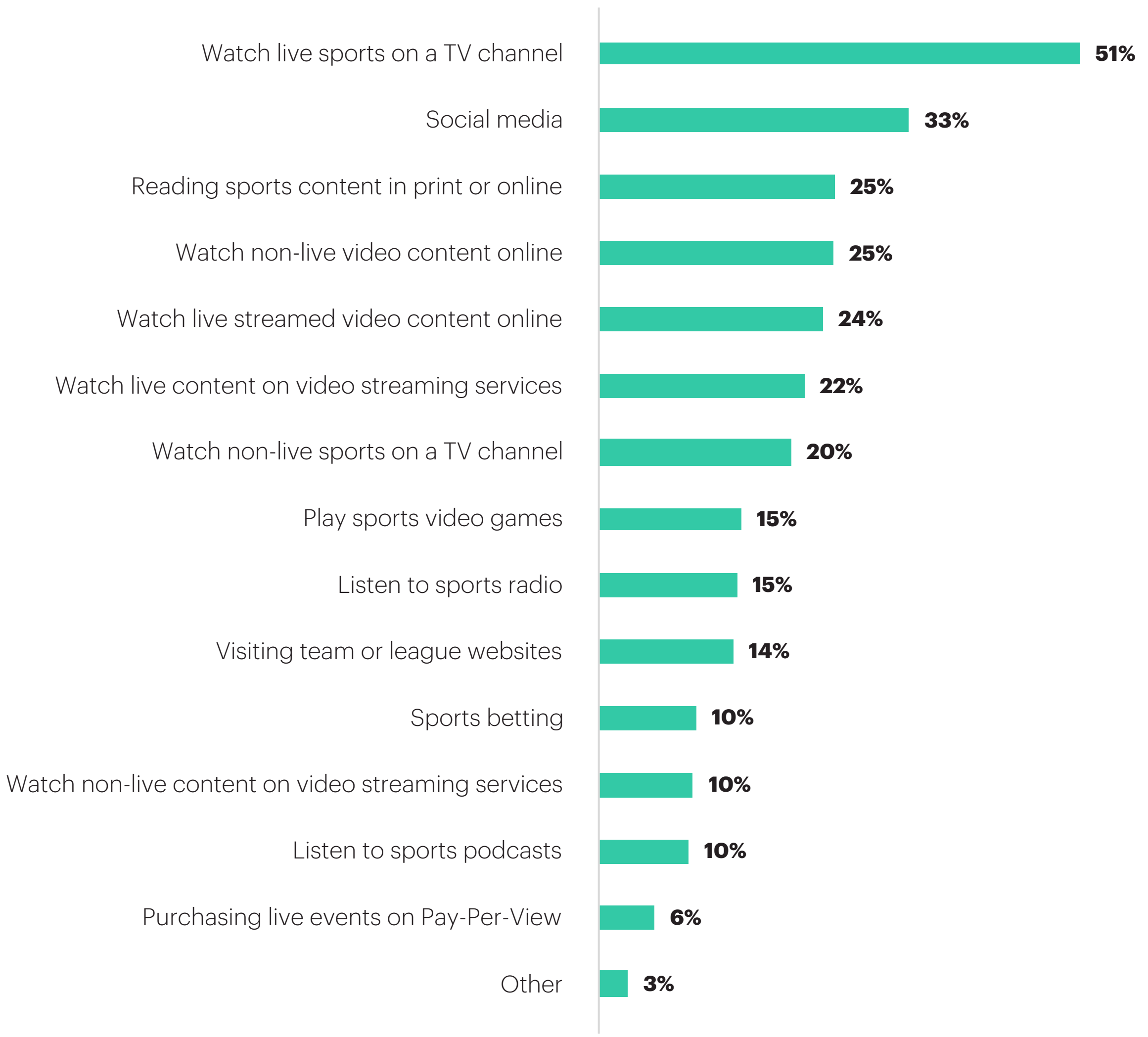
Live TV holds strong

Watching live sports on TV is the most popular way to engage with sports regularly followed for **51%** of Engaged Sports Fans. Social media ranks as the second most popular way to consume sports for a third **(33%)** of Engaged Sports Fans.

More traditional ways of keeping up to date by reading sports content either online, or in print, are on par with viewing both live and non-live content online or via video streaming. With the increasing number of deals for sports content among streaming giants such as Netflix, Amazon, and Apple, we are likely to see video streaming popularity **(22%)**, grow among Engaged Sports Fans. Other ways of engaging with sports content, such as playing video games, present new ways for sports and entertainment brands and advertisers to connect with sports fans across a diversified range of platforms.

How consumers engage with the sports they regularly follow by Engaged Sports Fans



Engaged Sports Fans

Q: Which, if any, of the following ways do you engage with the sports you regularly follow? (i.e., in the last 30 days).

Younger sports fans favor digital over traditional sports viewing

Patterns vary dramatically when exploring Engaged Sports Fans across different platforms by age and gender. Watching live sports on TV is most prevalent among those aged 55+, while social media ranks as the top way to engage with sport among 18-34s: consumers aged under 34 are twice as likely than those aged 55+ to engage with sport via social media **(43% vs 19%)**. In addition, there is a higher preference among younger generations for watching live and non-live sport via streamed video content online, along with listening to sports podcasts.

Male fans are more engaged with sports than female fans across all methods of engagement, with the exception of social media **(32% vs 35%).**

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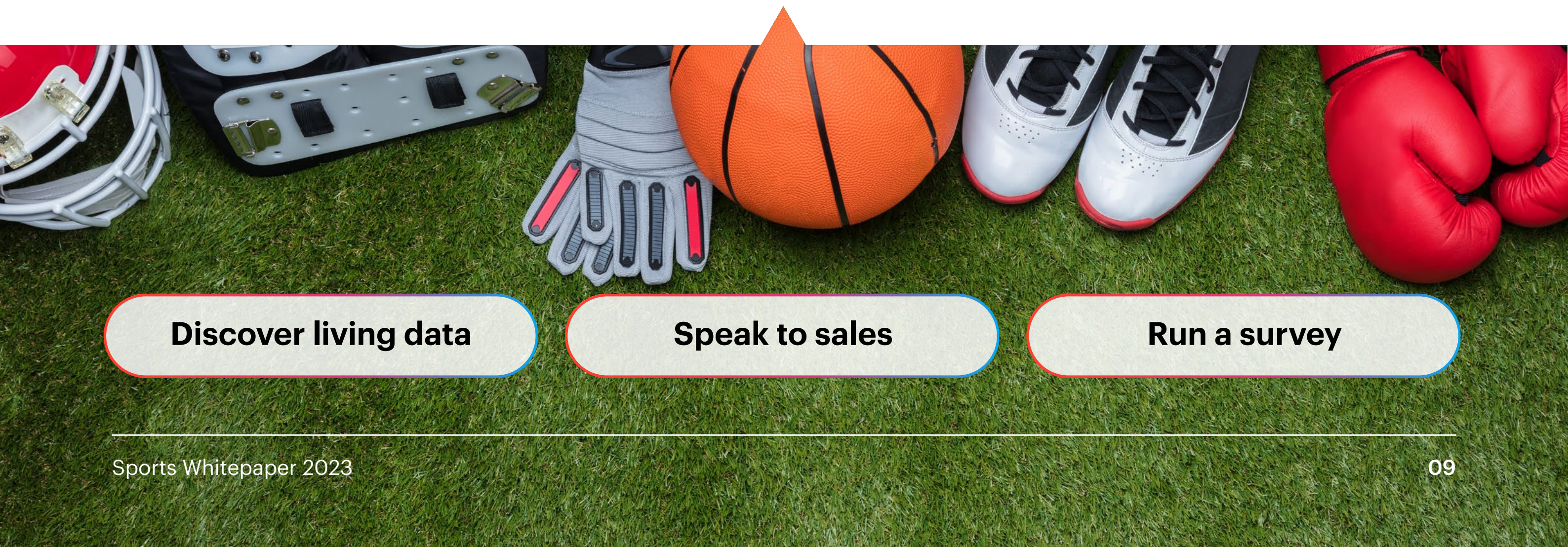
How consumers engage with the sports they regularly follow by Engaged Sports Fans	Global total	18-24	25-34	35-44	45-54	55+	Male	Female
Watch live sports on a TV channel	**51%**	31%	36%	44%	56%	75%	52%	49%
Social media	**33%**	41%	43%	38%	33%	19%	32%	35%
Watch non-live video content online	**25%**	32%	31%	28%	24%	16%	28%	21%
Reading sports content in print or online	**25%**	20%	22%	23%	27%	31%	29%	20%
Watch live streamed video content online	**24%**	31%	30%	27%	25%	13%	26%	20%
Watch live content on video streaming services	**22%**	22%	25%	24%	23%	17%	24%	19%
Watch non-live sports on a TV channel	**20%**	19%	20%	21%	22%	20%	23%	18%
Play sports video games	**15%**	26%	22%	17%	13%	4%	18%	11%
Listen to sports radio	**15%**	9%	12%	14%	18%	18%	17%	11%
Visiting team or league websites	**14%**	14%	15%	16%	15%	12%	18%	10%
Watch non-live content on video streaming services	**10%**	14%	16%	11%	10%	4%	11%	8%
Listen to sports podcasts	**10%**	12%	13%	13%	9%	4%	11%	7%
Sports betting	**10%**	11%	13%	12%	11%	7%	13%	7%
Purchasing live events on Pay-Per-View	**6%**	8%	8%	8%	5%	2%	7%	5%

Q: Which, if any, of the following ways do you engage with the sports you regularly follow? (i.e., in the last 30 days).

Understanding how different fans engage with sports is key for marketers and brands to connect with them via the most efficient channel. Social media is changing the way sports stars, clubs and fans are interacting with each other.

From live-tweeting games to providing fans with team/game specific hashtags to publish, spectators are no longer simply watching sport. Fans now receive news, insights, and commentary straight from the source.



The rise of social media sports engagement

Examining how consumers engage with sports by country reveals the growing popularity of social media in sports across all global markets, with social channels rising as a top three sports content choice for consumers in 15 out of 18 markets.

Social media occupies the pole position in all Asian countries, while live TV is the preferred method in 12 out of the 18 markets surveyed, dominating sports in the more traditional European markets, along with North America (US, Mexico, and Canada).

Spain is the only country where listening to sports radio appears in the top three. Watching live content on video streaming services is the second preferred way to engage with sports content for Americans and Italians and third for Britons.

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Top three ways Engaged Sports Fans consume the sports they regularly follow by country			
	1st	2nd	3rd
Global total	Watch live on TV **51%**	Social media **33%**	Reading print or online **25%**
Australia	Watch live on TV **54%**	Social media **32%**	Watch non-live video online **26%**
Canada	Watch live on TV **54%**	Social media **27%**	Reading print or online **27%**
China	Social media **39%**	Watch live on TV **34%**	Watch live streamed video online **32%**
Denmark	Watch live on TV **66%**	Reading print or online **24%**	Social media **22%**
France	Watch live on TV **67%**	Social media **20%**	Reading print or online **19%**
GB	Watch live on TV **68%**	Reading print or online **26%**	Social media **26%**
Germany	Watch live on TV **59%**	Reading print or online **25%**	Watch non-live on TV **21%**
Hong Kong	Social media **52%**	Watch non-live video online **43%**	Watch live on TV **38%**
India	Social media **47%**	Watch live on TV **42%**	Watch live streamed video online **41%**
Indonesia	Social media **48%**	Watch live on TV **40%**	Watch non-live video online **38%**
Italy	Watch live on TV **58%**	Watch live on video streaming services **27%**	Reading print or online **24%**
Mexico	Watch live on TV **42%**	Social media **36%**	Watch non-live video online **35%**
Poland	Watch live on TV **62%**	Social media **31%**	Reading print or online **28%**
Singapore	Social media **52%**	Watch non-live video online **39%**	Watch live streamed video online **32%**
Spain	Watch live on TV **55%**	Reading print or online **33%**	Listen to radio **29%**
Sweden	Watch live on TV **60%**	Reading print or online **30%**	Social media **27%**
UAE	Social media **46%**	Watch live on TV **33%**	Watch live streamed video online **31%**
US	Watch live on TV **61%**	Watch live on video streaming services **30%**	Social media **26%**

Q: Which, if any, of the following ways do you engage with the sports you regularly follow? (i.e. in the last 30 days).

Deep Dive: How American fans engage with sport

As fans globally continue to access sports content in new ways, we take a deeper dive into US fans and explore the most popular ways of engaging followers of different types of sport using **YouGov US Profiles.** The excitement and suspense of watching live sports on TV is the number one choice for fans of all types of sports, with golf **(75%)**, American footballl **(72%)** and basketball **(72%)** fans registering the highest preference for live TV.

Soccer fans in particular are prolific consumers of sports digital content. They are more likely to watch sports content via digital platforms and formats than fans of any other types of sports. These include watching on live and non-live TV, live and non-live video streaming services, and live and non-live sports content online. In addition, soccer fans are more likely to consume sports content on social media and podcasts than other sports fans.

Connecting with fans via social media helps initiate engagement pre, during and post-game and creates opportunities for fans to get involved and form bonds with other like-minded enthusiasts. Social media has higher appeal for golf fans but lower appeal for football fans. Ice hockey fans are most likely to keep engaged by reading about the sport online or in print, while sports radio is particularly appealing to US golf fans.

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Sports fans engagement with sports regularly followed - US						
	Golf	**Basketball**	**Football**	**Baseball**	**Ice Hockey**	**Soccer**
Watch live sports on a TV channel	75%	72%	72%	70%	68%	68%
Reading sports content in print or online	43%	38%	34%	36%	53%	40%
Watch live content on video streaming services	36%	37%	33%	32%	41%	53%
Social media	34%	29%	25%	31%	32%	40%
Listen to sports radio	33%	21%	21%	25%	28%	24%
Visiting team or league websites	27%	23%	20%	23%	29%	28%
Watch live streamed video content online	23%	23%	19%	18%	21%	29%
Watch non-live sports on a TV channel	21%	21%	16%	18%	21%	26%
Watch non-live video content online	20%	21%	17%	18%	21%	32%
Listen to sports podcasts	20%	17%	12%	15%	19%	29%
Sports betting	20%	13%	9%	11%	12%	17%
Play sports video games	14%	15%	11%	10%	15%	22%
Watch non-live content on video streaming services	9%	10%	7%	7%	12%	16%
Purchasing live events on Pay-Per-View	9%	7%	4%	5%	8%	12%

Q: Which, if any, of the following ways do you engage with the sports you regularly follow? (i.e., in the last 30 days).

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Deep Dive: How Indian fans engage with sport

Looking at India in more detail, when comparing fans of different sports (whether soccer or Kabaddi), social media tips ahead of watching live on TV, with the exception of tennis where the two are almost on a par **(53% live TV, 52% social media)**. We have already seen that digital plays a big role in the Indian sports media landscape, with a high proportion of fans interacting with sports via watching live content online, video streaming, playing sports video games, non-live video streaming, and podcasts. Basketball, and boxing fans are most likely to engage on Pay-Per-View, while boxing, basketball, and soccer fans are most likely to watch live and non-live sport online. In India, boxing fans in particular are heavy consumers of many different media types, scoring higher than fans of other types of sport for social media **(62%)**, live TV **(59%)**, live streamed video **(59%)**, and live streamed video services **(55%)**, newspapers or magazines **(52%)**, video games **(41%)** and radio **(20%)**.

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Sports fans engagement with sports regularly followed - India						
	Boxing	Soccer	Badminton	Kabadi	Tennis	Cricket
Social media	62%	54%	54%	53%	52%	47%
Watch live sports on a TV channel	59%	51%	48%	46%	53%	46%
Watch live streamed video content online	59%	52%	47%	46%	49%	39%
Watch live content on video streaming services	55%	48%	45%	40%	47%	36%
Reading sports content in print or online	52%	47%	44%	40%	46%	34%
Watch non-live video content online	46%	46%	40%	38%	41%	34%
Play sports video games	41%	35%	29%	30%	31%	23%
Watch non-live sports on a TV channel	35%	37%	33%	32%	37%	26%
Watch non-live content on video streaming services	29%	25%	20%	22%	22%	16%
Listen to sports podcasts	28%	18%	26%	22%	23%	17%
Sports betting	22%	16%	17%	18%	18%	13%
Listen to sports radio	20%	16%	13%	12%	17%	11%
Visiting team or league websites	19%	15%	16%	14%	14%	9%
Purchasing live events on Pay-Per-View	16%	12%	12%	13%	12%	10%

Q: Which, if any, of the following ways do you engage with the sports you regularly follow? (i.e., in the last 30 days).

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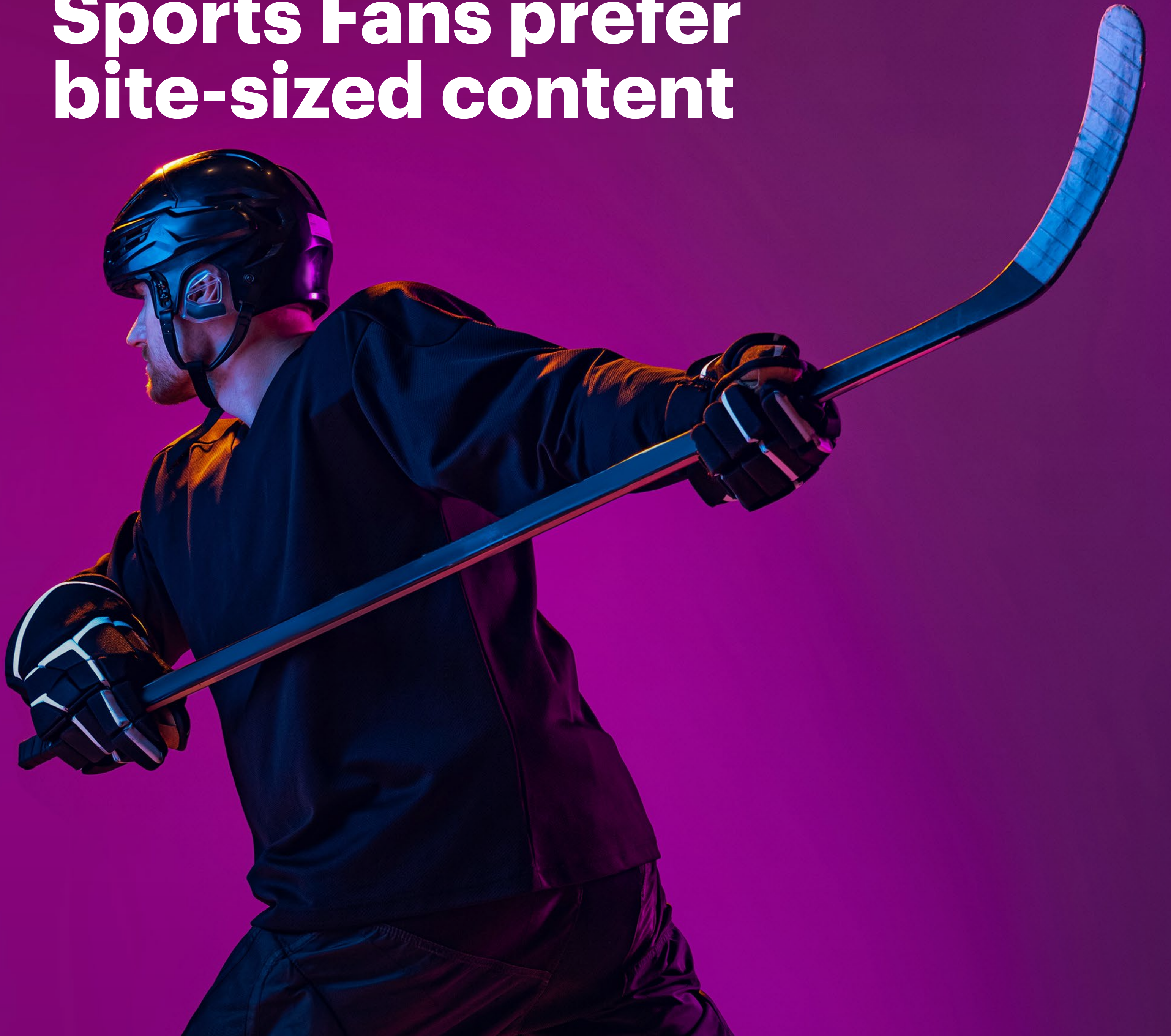
Younger Engaged Sports Fans prefer bite-sized content



Moving onto preferred content length and format types among our global Engaged Sports Fans, **36%** are more likely to watch live games in their entirety, and a quarter prefer shorter clips or highlights of games. **28%** are undecided and watch a combination of both.
When looking at global Engaged Sports Fans by age, the 18–24-year-old category is the only age group where the preference for clips or highlights is higher than watching live games in their entirety. On the other hand, Engaged Sports Fans aged 45+ register the highest scores for watching live games in their entirety, and the lowest percentages for shorter form content or highlights. This correlates with the higher levels of sports consumption via social media among younger generations, and higher penetrations for watching live sports on TV among older consumers.

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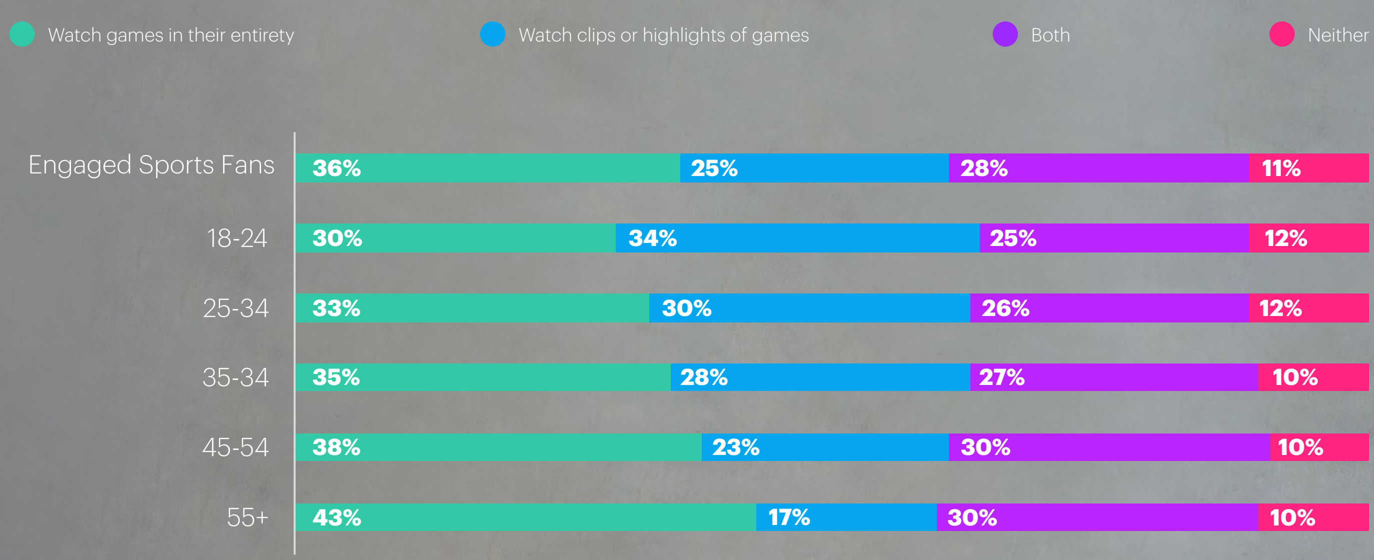
Preferred length and format of sports content among Engaged Sports Fans by age - Global



Q: Thinking about the sports that you engage with regularly, are you more likely to...?

Asian fans prefer short form content

Among global Engaged Sports Fans, preference for watching live games in their entirety is higher than clips or highlights for 15 out of the 18 markets surveyed. Countries with higher dominance of watching live action on TV are also those with a higher preference for watching live games in their entirety. European Engaged Sports Fans are most likely to prefer full-length live sports events, while short form clips or highlights are preferred in Asian markets where populations are younger, and engagement with sports via social media is highest. Indonesia, China, Singapore, and Hong Kong are the only markets where the preference for short form clips or highlights is higher than watching live games in their entirety.

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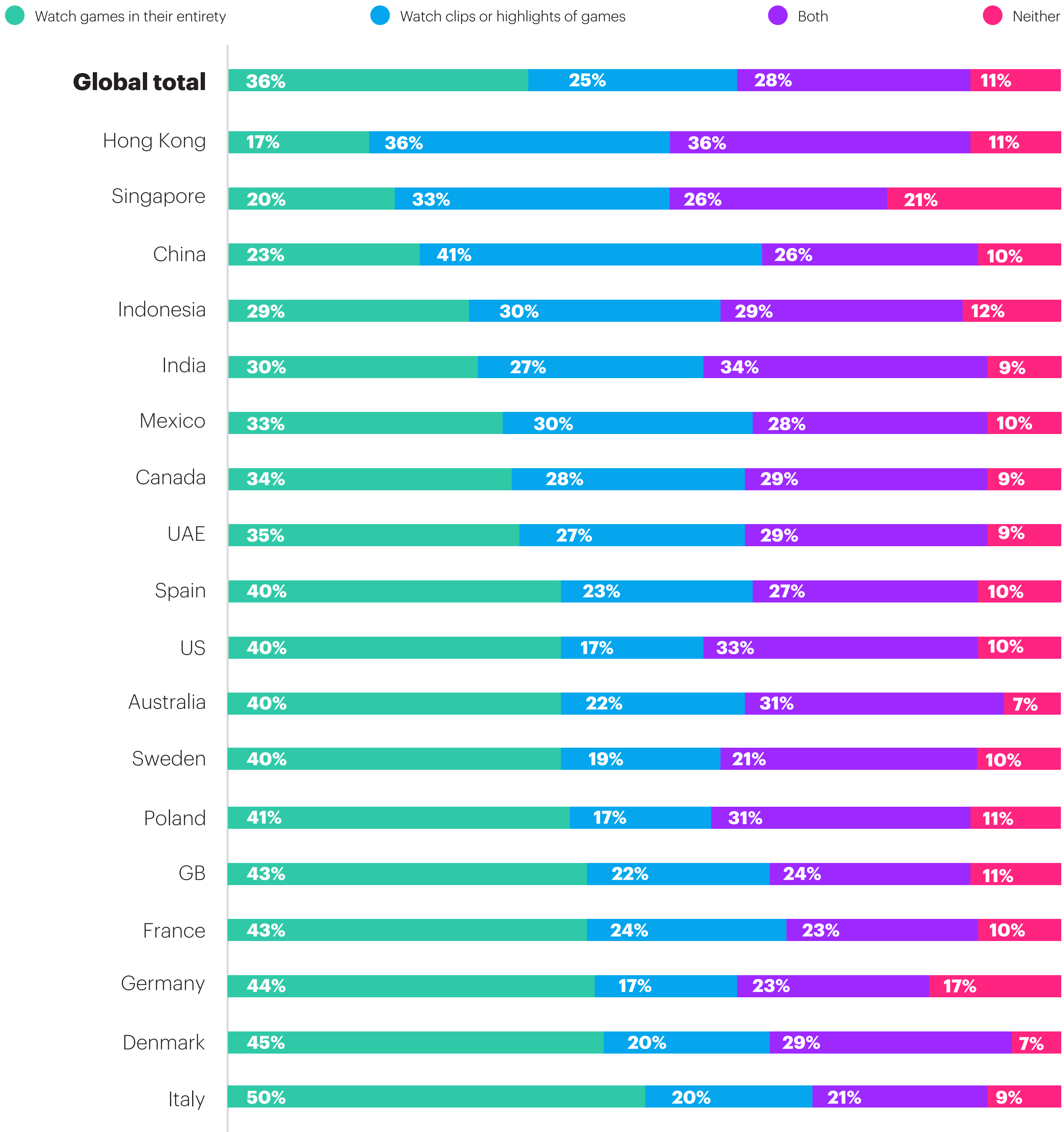
Preferred length and format of sports content among Engaged Sports Fans by country

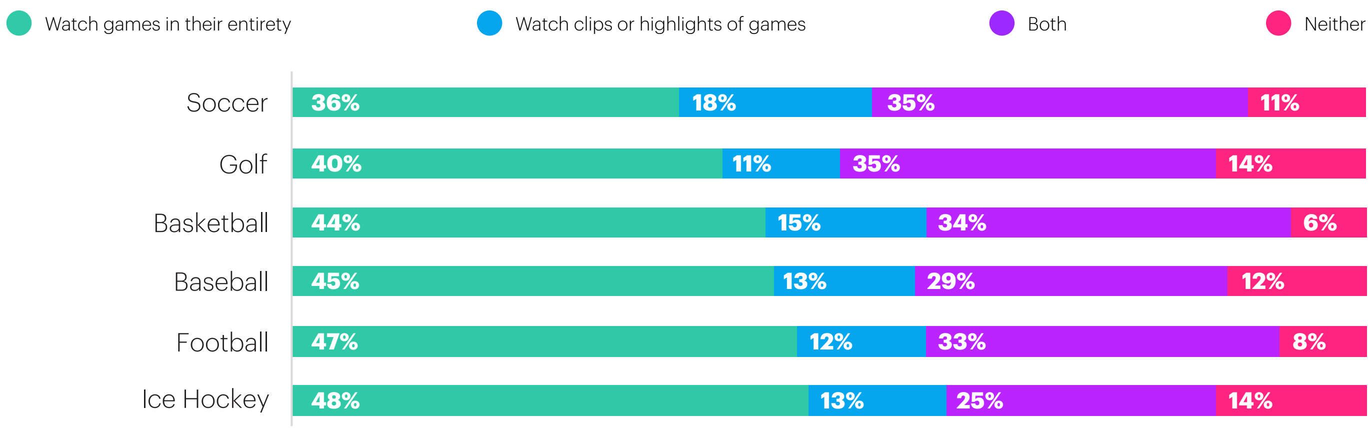


Q: Thinking about the sports that you engage with regularly, are you more likely to...?

American hockey and football fans prefer watching live games in full

Using **YouGov US Profiles**, we can explore the preferred content length and format preferences among fans of different sports. Among US fans, the excitement of watching a live game in its entirety is more appealing than short clips, with ice hockey, football, baseball, and basketball fans registering the highest preference for this longer form content. Watching a combination of both is highest among, soccer, golf and basketball fans. It is important that sports organizations, teams, and leagues look to combine the best of both content formats to form a deeper connection and engagement with existing fans and widen their fan base.

Preferred length and format of sports content among sports fans - US



Q: Thinking about the sports that you engage with regularly, are you more likely to...?

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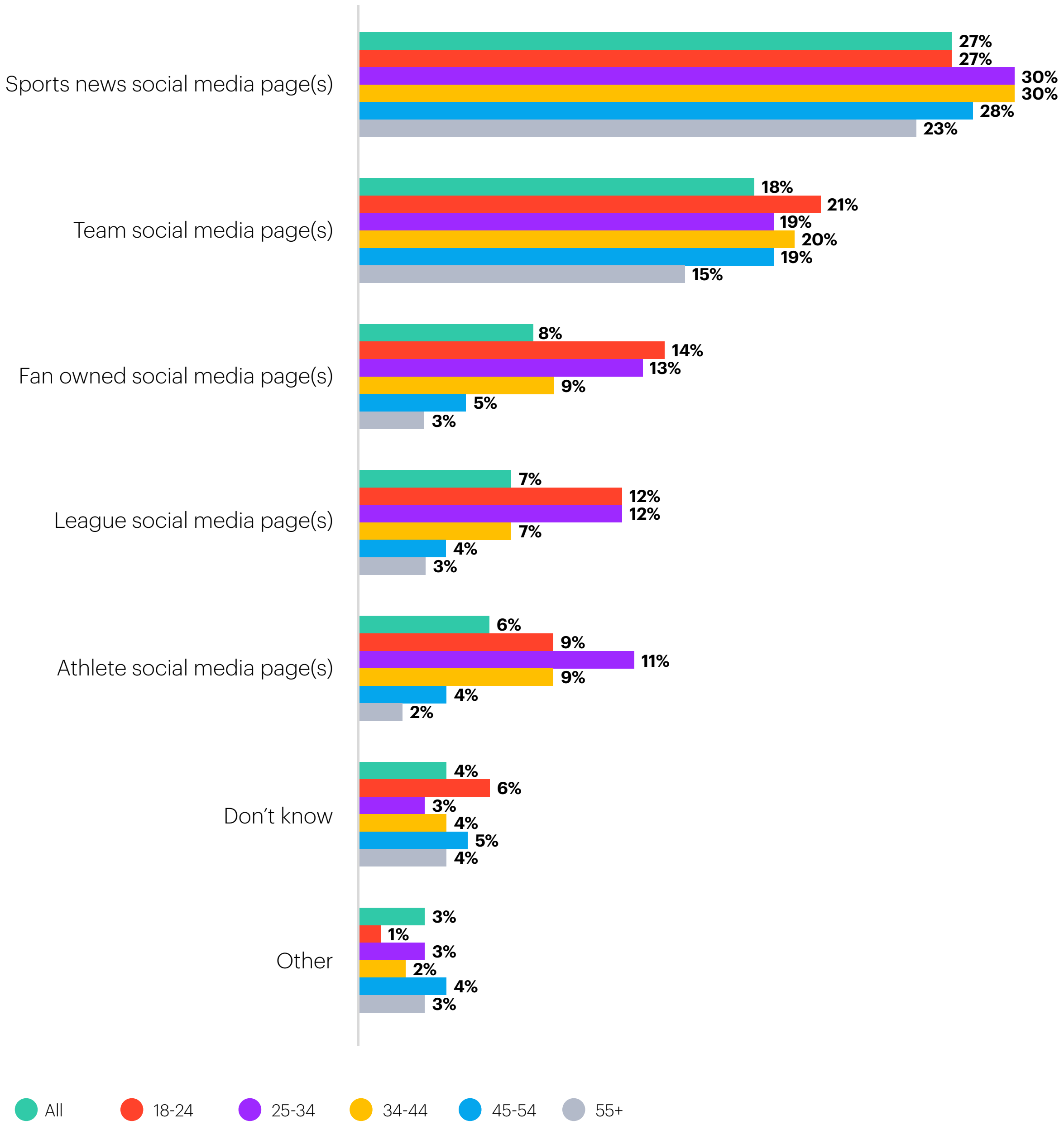
Role of social media driving American fan engagment

As the new sports media landscape evolves, it is important to understand the role of social media in keeping fans engaged. Whether it's ensuring fans are updated on team news such as signings, contracts, announcements, or events, or finding out more about their favorite athletes, fans of all ages are turning to social media platforms for sports content. Focusing on avid US sports fans (where sport is their top interest), three quarters **(74%)** follow sports social media pages, increasing to nine in ten among 18-24 and 25-34 year olds, highlighting the importance for social in the sports mix for younger generations. Sports news pages are the most preferred type of sports pages on social media across all age groups, followed by team social media pages.

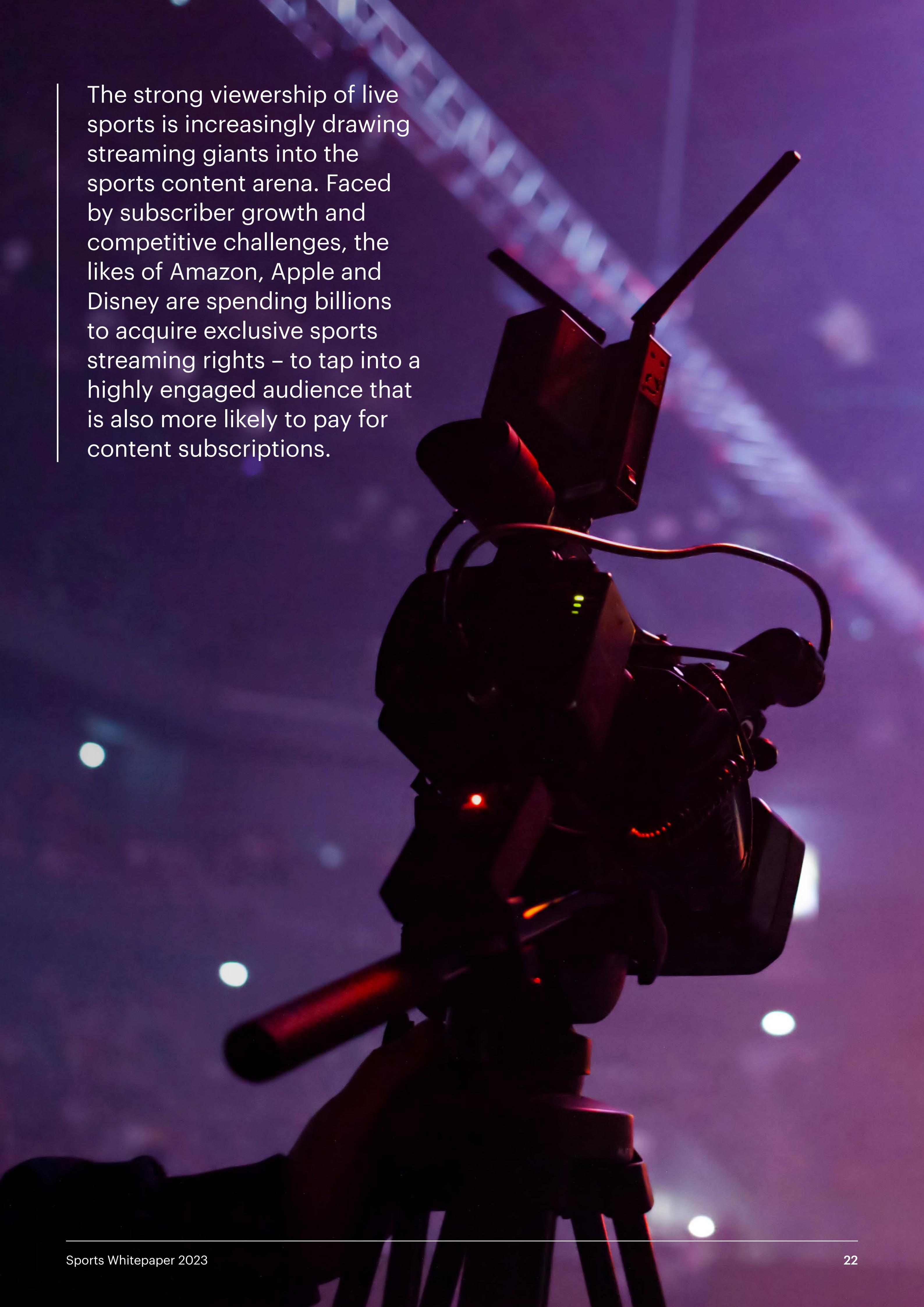
Most preferred sports social media pages among US sports fans



Q: Which type of sports social media page, if any, is your most preferred type to follow for sports content? Please select ONE option.

PART - 2

A new era of sports consumption

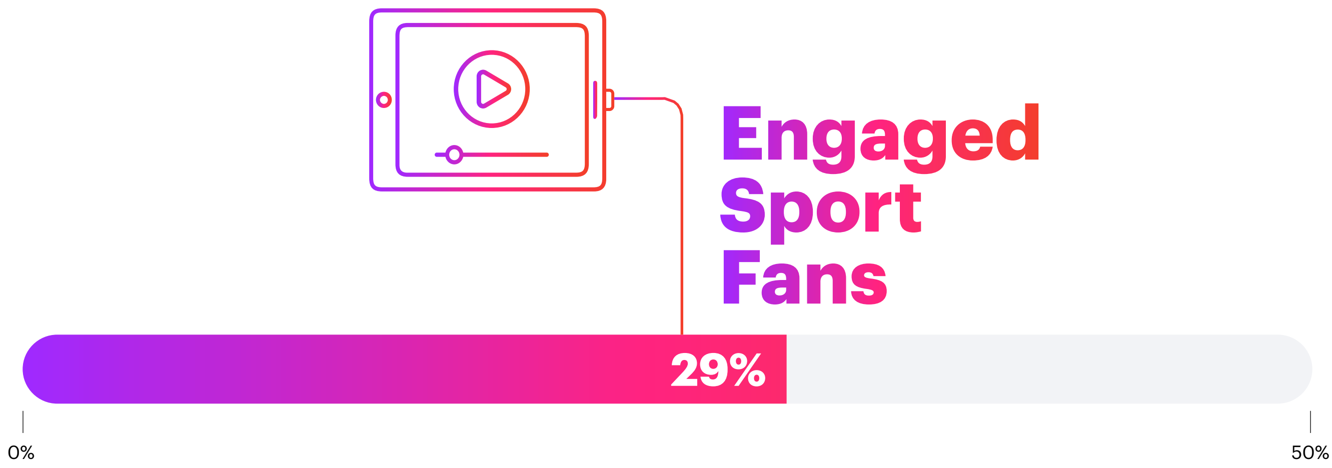


The strong viewership of live sports is increasingly drawing streaming giants into the sports content arena. Faced by subscriber growth and competitive challenges, the likes of Amazon, Apple and Disney are spending billions to acquire exclusive sports streaming rights – to tap into a highly engaged audience that is also more likely to pay for content subscriptions.

Appetite for subscriptions

Globally, just over a fifth of consumers **(21%)** subscribe to a streaming platform or service specifically to access exclusive sports content. However, among our Engaged Sports Fans segment, this figure rises to almost three in ten **(29%)**. Interestingly, streaming services are uniquely placed to potentially elevate fan engagement with other related sports-based content e.g., original shows, docuseries etc.

Subscribe to streaming platforms to access exclusive sports content – Global



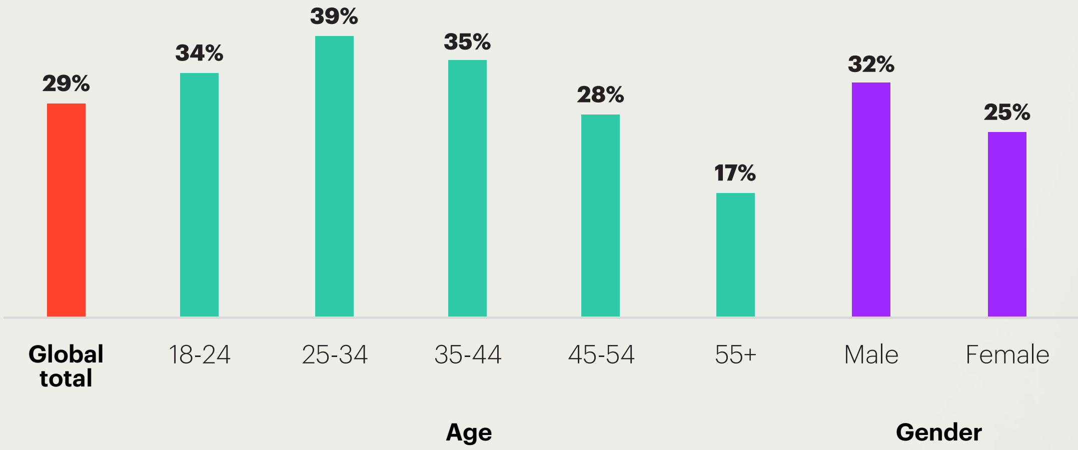
Q: Have you specifically subscribed to a streaming platform or service to gain access to exclusive sports content? (i.e., Apple TV to watch Major League Soccer, NFL+ Game Pass to watch NFL games, Amazon Prime to watch boxing matches)

Two in five Engaged Sports Fans aged 25-34 subscribe to exclusive sports content

The digital savviness of younger generations enhances sports subscription behavior, with the 25-34 age group registering the highest proportion of subscriptions **(39%)**. Engaged Sports Fans from the 55+ age group are the laggards **(17%)** in terms of streaming sports content.

Looking at gender, **32%** of male Engaged Sports Fans subscribe to a streaming platform/ service for exclusive content , while the gap closes among Engaged Sports Fan females **(25%).**

Engaged Sports Fans who subscribe to streaming platforms to gain access to exclusive sports content by age and gender - Global



Q: Have you specifically subscribed to a streaming platform or service to gain access to exclusive sports content? (i.e., Apple TV to watch Major League Soccer, NFL+ Game Pass to watch NFL games, Amazon Prime to watch boxing matches)

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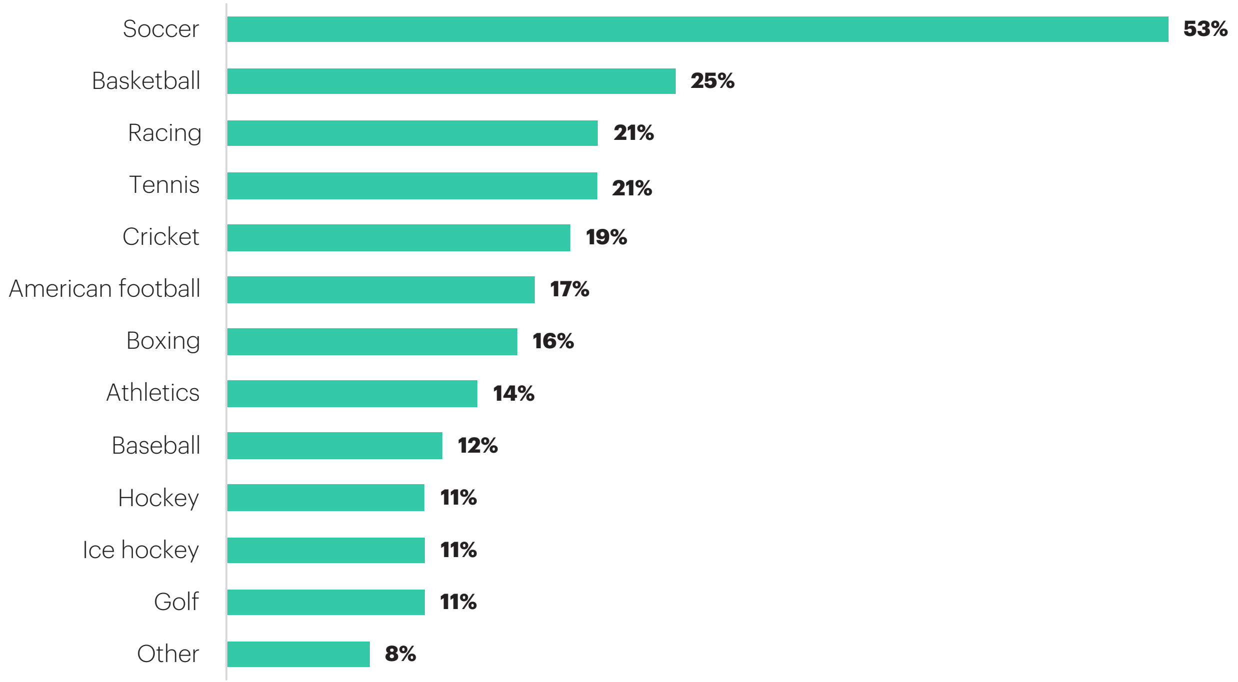
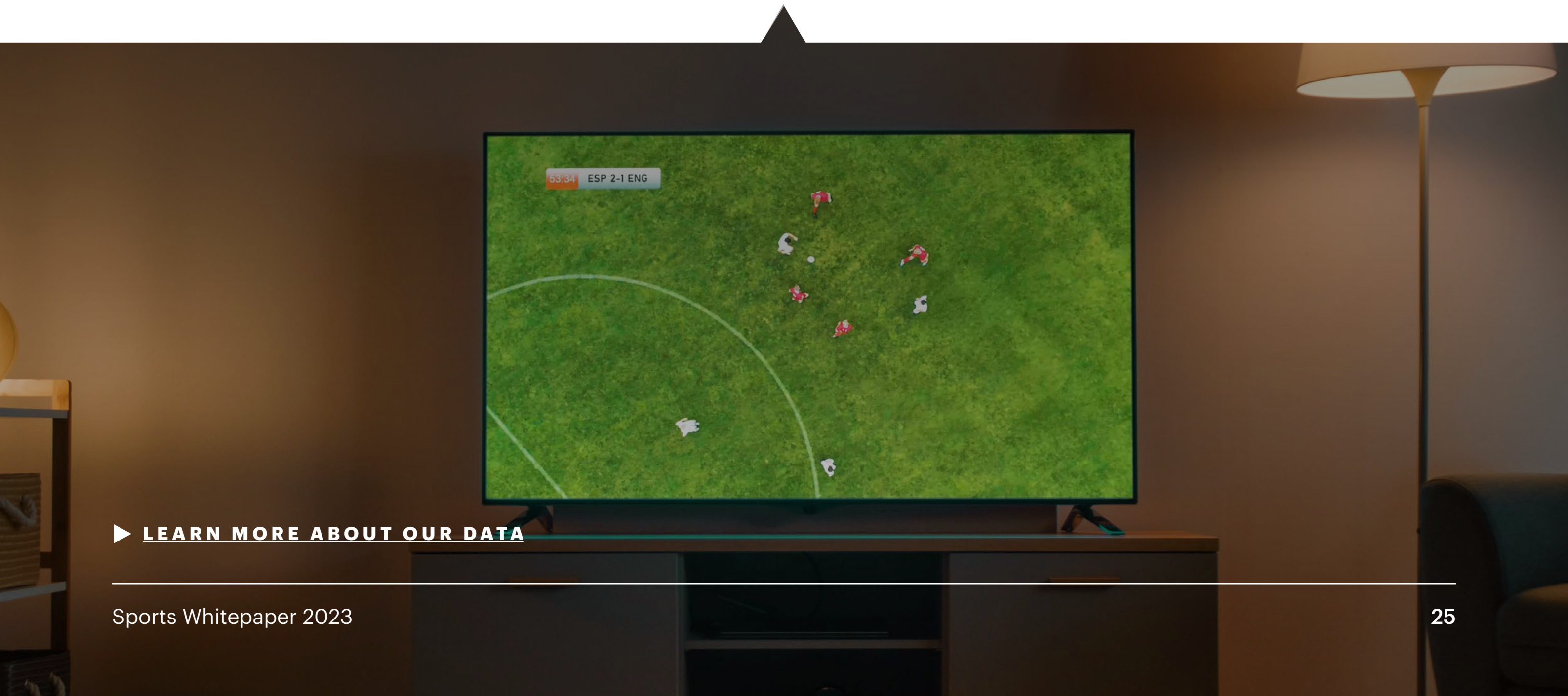
Soccer popularity is spilling over to streaming services

In the area of digital sports streaming and content, soccer is the most popular sport – with **53%** of sports subscribers accessing soccer content. Major soccer competitions such as the Premier League enjoy undisputed viewership and massive popularity. In today's digitally driven age, streaming services have a huge opportunity to cater to this already devoted fan base. The next most popular sport among global sports subscribers is basketball **(25%)**, followed closely by motor racing and tennis **(21%)**.

Sports for which viewers have subscriptions to access exclusive content - Global



Q: For which of the following sports do you have a subscription to access exclusive content?



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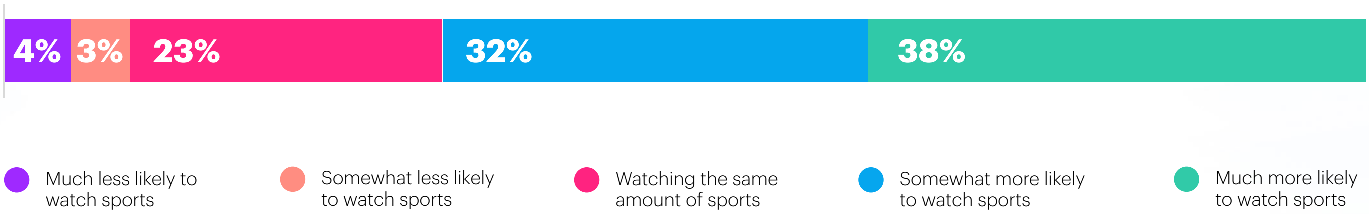
Subscriptions driving sports lovers to watch more

Numerous sports streaming platforms have proliferated – covering a wide range of prominent, as well as niche, sports and teams. Globally, sports-led subscriptions enhance the level of sports consumption among subscribers. In fact, seven in ten report that their sports content subscription has encouraged them to consume more sports content, with about a quarter **(23%)** maintaining their current levels of sports viewership.

Impact of subscriptions on consumption of sports among sports content subscribers - Global



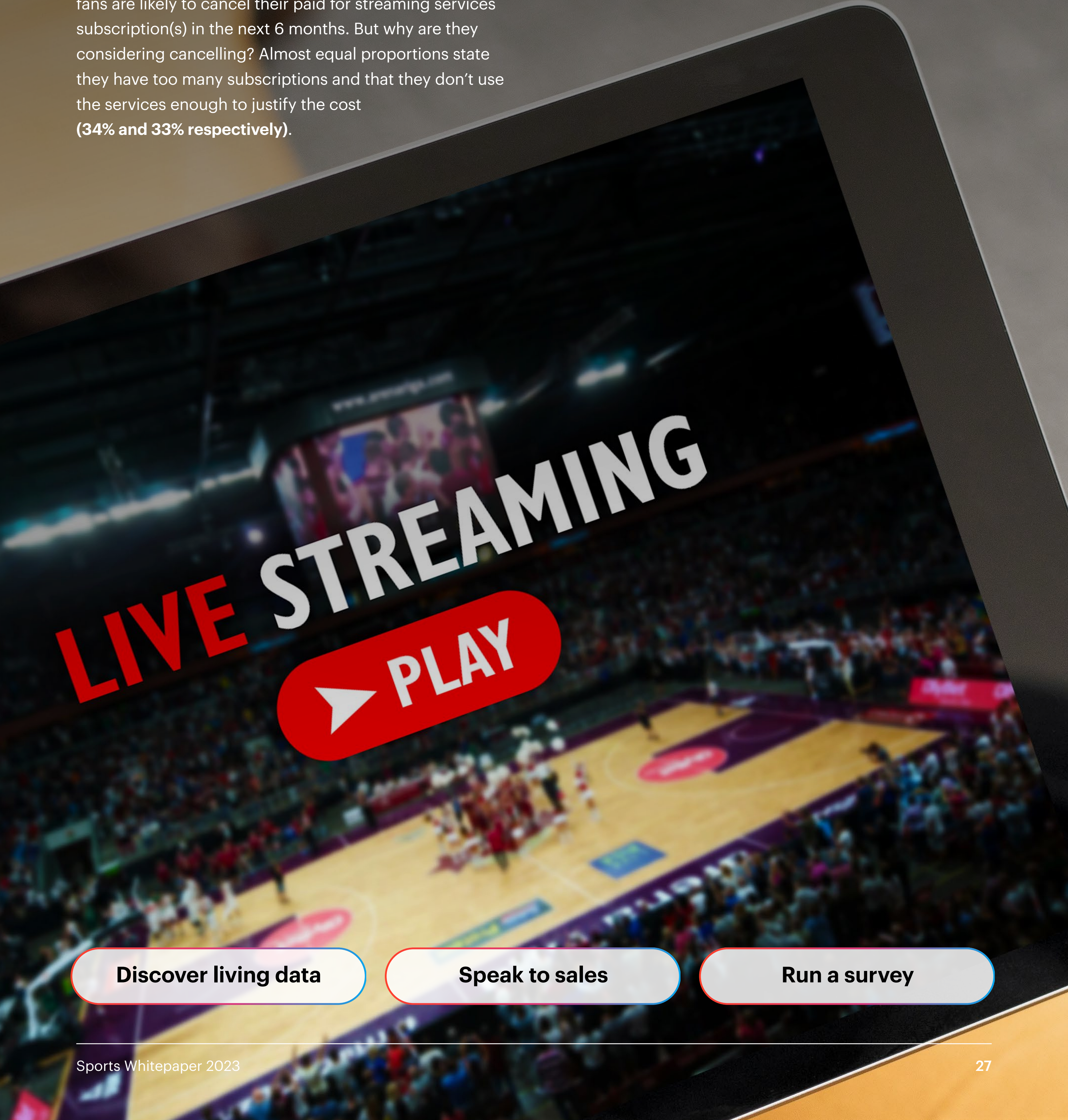
Q. With your subscription, are you...?

The cost of streaming

While there is a clear appetite for subscribing to streaming platforms to watch sports content, streaming services are battling for the attention and wallets of sports viewers and the challenges associated with retaining subscribers. The rising cost of living is hitting people hard and they are reviewing and rethinking their outgoings, including subscriptions.

YouGov US Profiles data reveals that **9%** of US sports fans are likely to cancel their paid for streaming services subscription(s) in the next 6 months. But why are they considering cancelling? Almost equal proportions state they have too many subscriptions and that they don't use the services enough to justify the cost **(34% and 33% respectively)**.

A further three in ten state it's more cost effective, or saves money, and under a fifth cite not wanting to pay for content they don't watch **(18%)**. It will be important for sports subscription service providers to continue to understand consumer needs, continually review pricing and value for money, and create sports related content that engages fans in new ways that encourages retention and attracts new subscribers.



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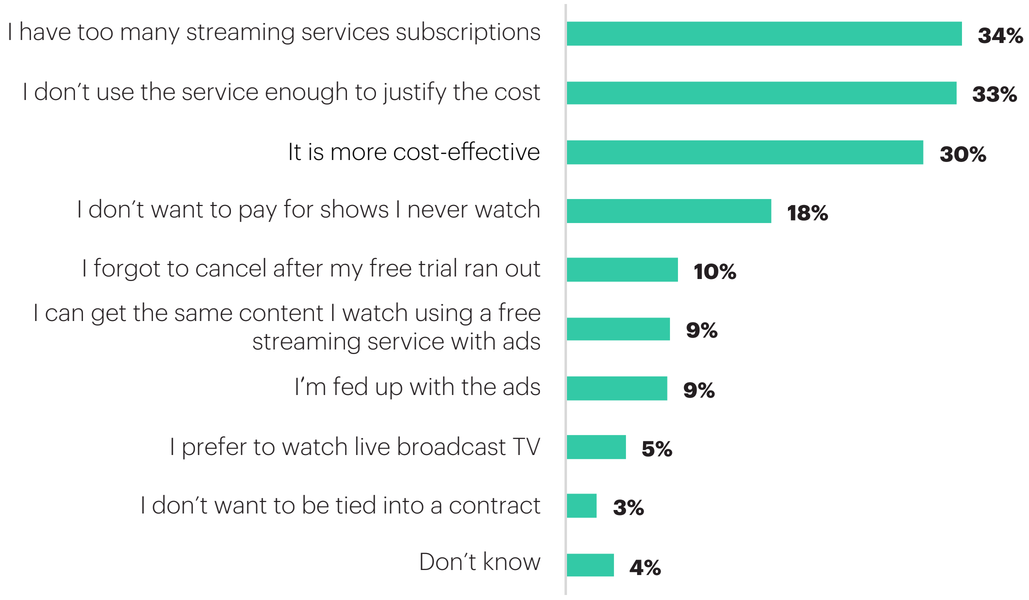
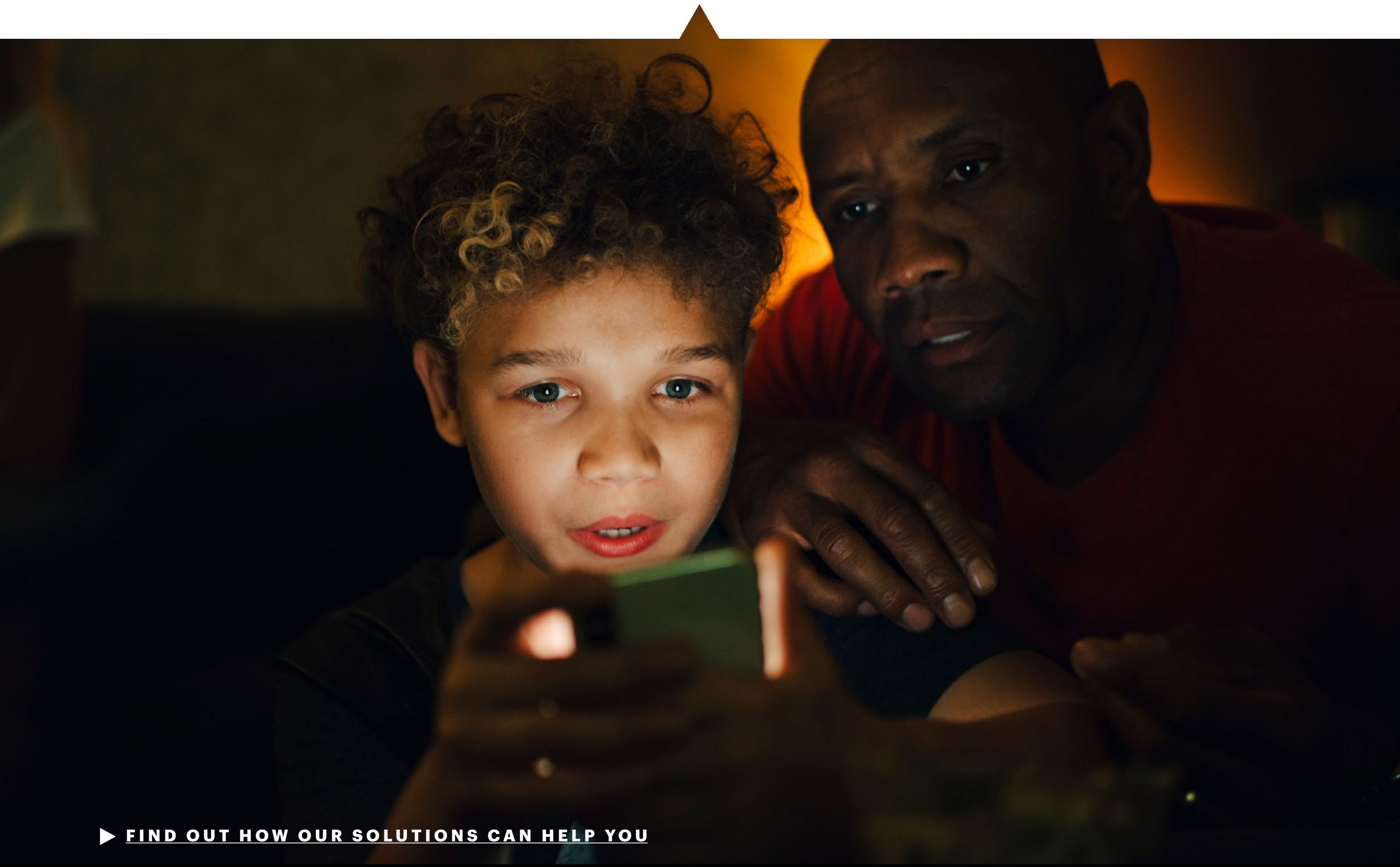
Reasons for cancelling paid for streaming services subscriptions among sports fans likely to cancel in the next 6 months



Q: Which, if any, of the following reasons describe why you are considering cancelling your paid for streaming services subscription(s) (e.g., Amazon Prime Video, Netflix, etc.)? YouGov US Profiles. Base: Likely to cancel paid for streaming services in the next 6 months and follow sports



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PART - 3

The rise of lifestyle sports content

As the sports content ecosystem evolves, the popularity of lifestyle-focused sports content continues to grow. Sports related documentaries, dramas and docuseries invite fans 'behind the scenes' of their beloved sports, teams, and athletes. They also offer organizations, teams, and athletes 'on screen' opportunities to build their brands.

Expanding sports interest with lifestyle driven content

The rise of subscription TV services has helped widen the audience for sports content in general and stimulate investment in new lifestyle-focused sports formats. On-demand streaming platforms such as Netflix, Amazon Prime Video, Disney+ etc. are all seeking to secure the production and distribution rights for lifestyle-focused sports programs.

Examples include Amazon Prime Video's exclusive distribution rights for 'Matchday', a behind-the-scenes documentary focusing on Spanish LaLiga club FC Barcelona through the lens of the first team. More recently, FX launched the docuseries 'Welcome to Wrexham' that chronicles the purchase and management of Wrexham AFC by Hollywood actors Ryan Reynolds and Rob McElhenney.

In addition, the Netflix docuseries 'F1: Drive to Survive' gives viewers exclusive access to the team owners, managers, and drivers embroiled in this multibillion-dollar business. We will be looking at this series in more detail, using **YouGov Signal** data in the US and GB, where we will explore audience viewership and engagement.

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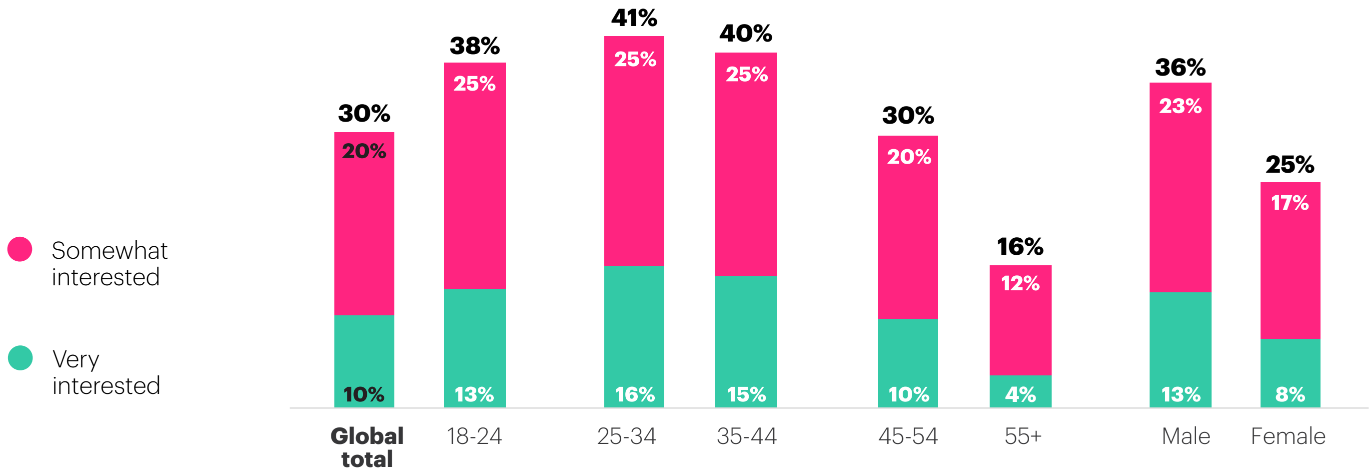
Younger generations more interested in lifestyle sports content

Changes in consumer viewing habits have also contributed to the desire for more shorter-form episodes, rather than feature-length programming, and with the increased amount of sports lifestyle content now available, global consumers are turning to this content en masse. YouGov data reveals that **30%** of global consumers are interested in watching lifestyle-focused sports content, increasing to **41%** of 25-34s.

Interest in lifestyle-focused sports content is highest among adults aged 18-44, where a higher proportion are interested in watching this programming than those who show little or no interest. Appeal is also higher among males **(36%)** compared to females **(25%)**.

Interest in watching lifestyle-focused sports content
Global by age and gender



Q: How interested, if at all, would you be in watching lifestyle-focused sports content? (i.e., Netflix docudrama, 'Formula 1: Drive to Survive' or docuseries, 'The Last Dance', chronicling the rise of superstar Michael Jordan and the 1990s Chicago Bulls)

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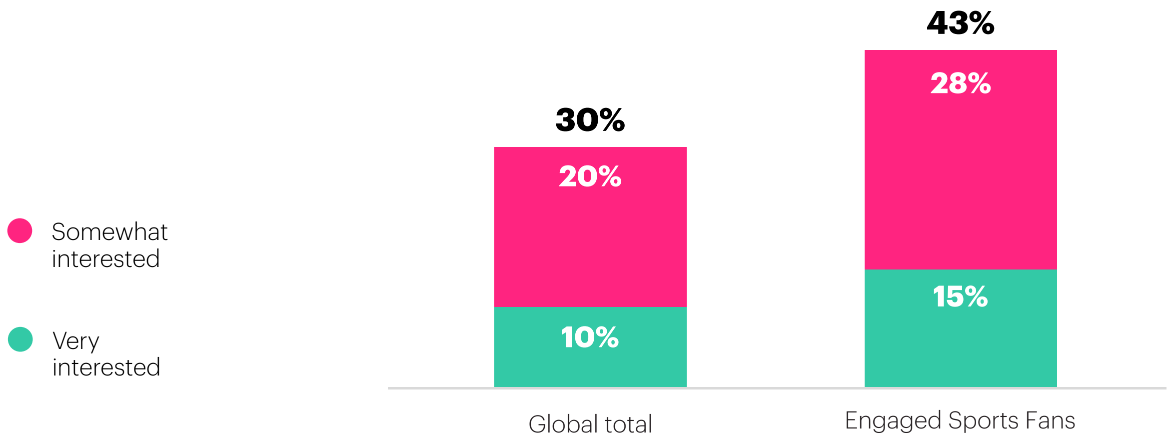
When we look at interest in watching lifestyle-focused sports content among our Engaged Sports Fans segment, not surprisingly, interest is significantly higher than the global total **(43% vs. 30%).**

Interest in watching lifestyle-focused sports content – Global total and Engaged Sports Fans



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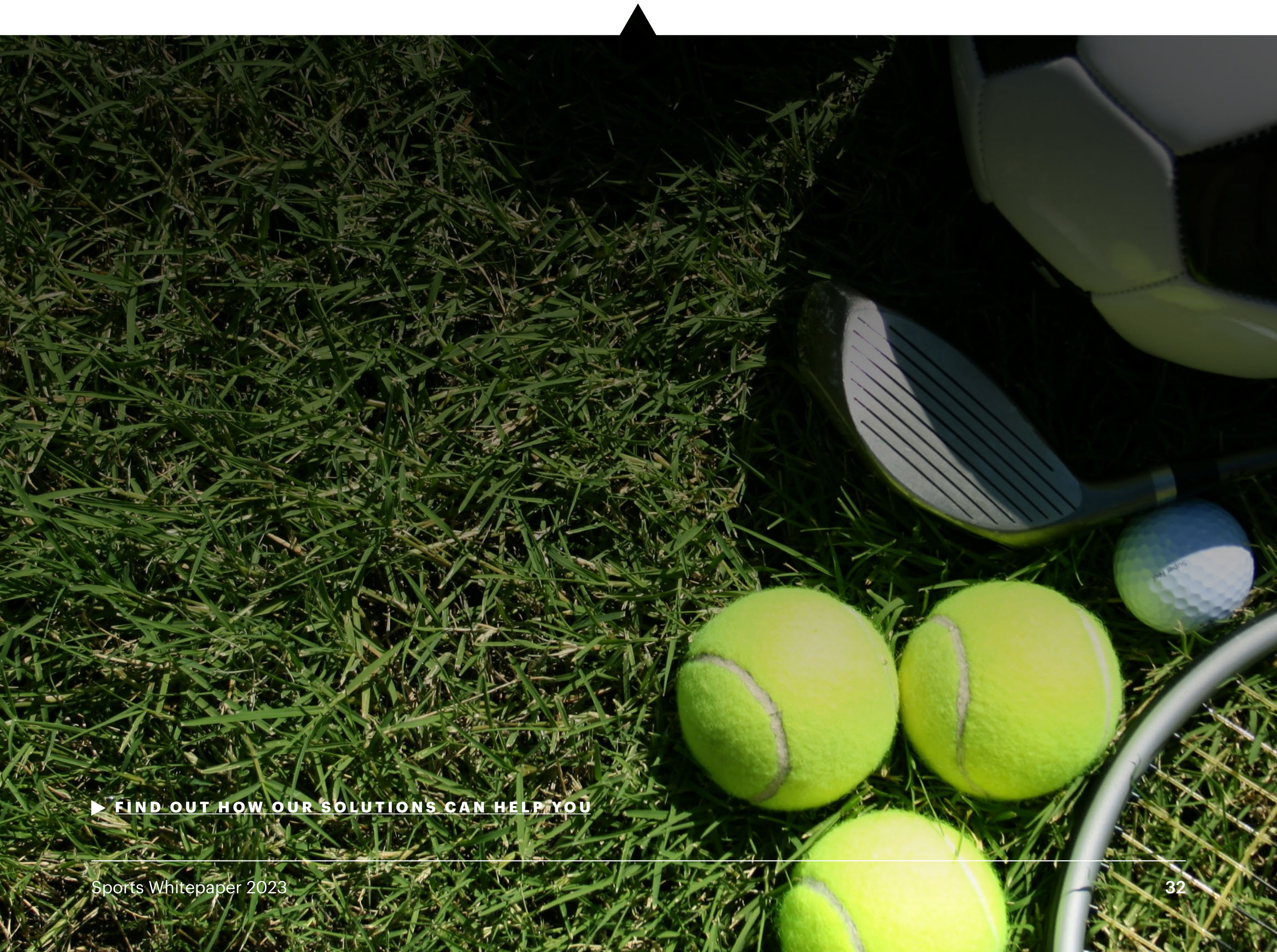

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Spotlight on Formula 1: Drive to Survive

Released in 2019 and now in its 5th season, Drive to Survive, is a documentary series produced as a collaboration between Netflix and Formula One, to give a behind-the-scenes look at the drivers and races of the Formula One World Championship.

It provides viewers with the opportunity to get to know the drivers, allowing the athletes to show off their personalities and bring Grand Prix racing to a wider audience.

A growing fanbase

Since its launch in 2019, the series' popularity and fanbase has been steadily growing, but the show reached new heights after the release of the fourth season in 2022.

Looking at search volume for the show in GB using **YouGov Signal** data, we can see how the number of people Googling the title each day peaks between February to April, just as each season launches and how it grows each year. Four times as many Brits were searching for the show in 2022 compared to 2021 and the search volume doubled for season five in 2023 compared to 2022.

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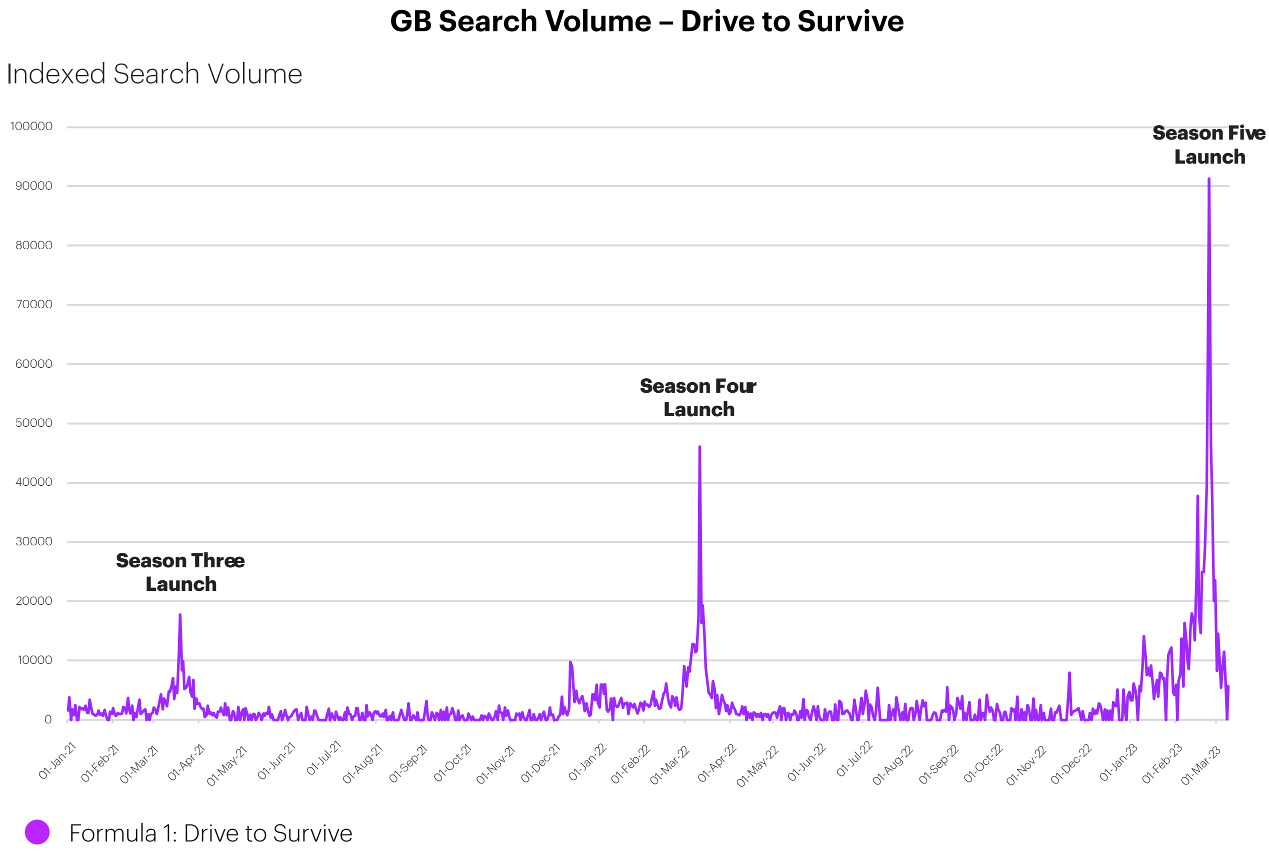
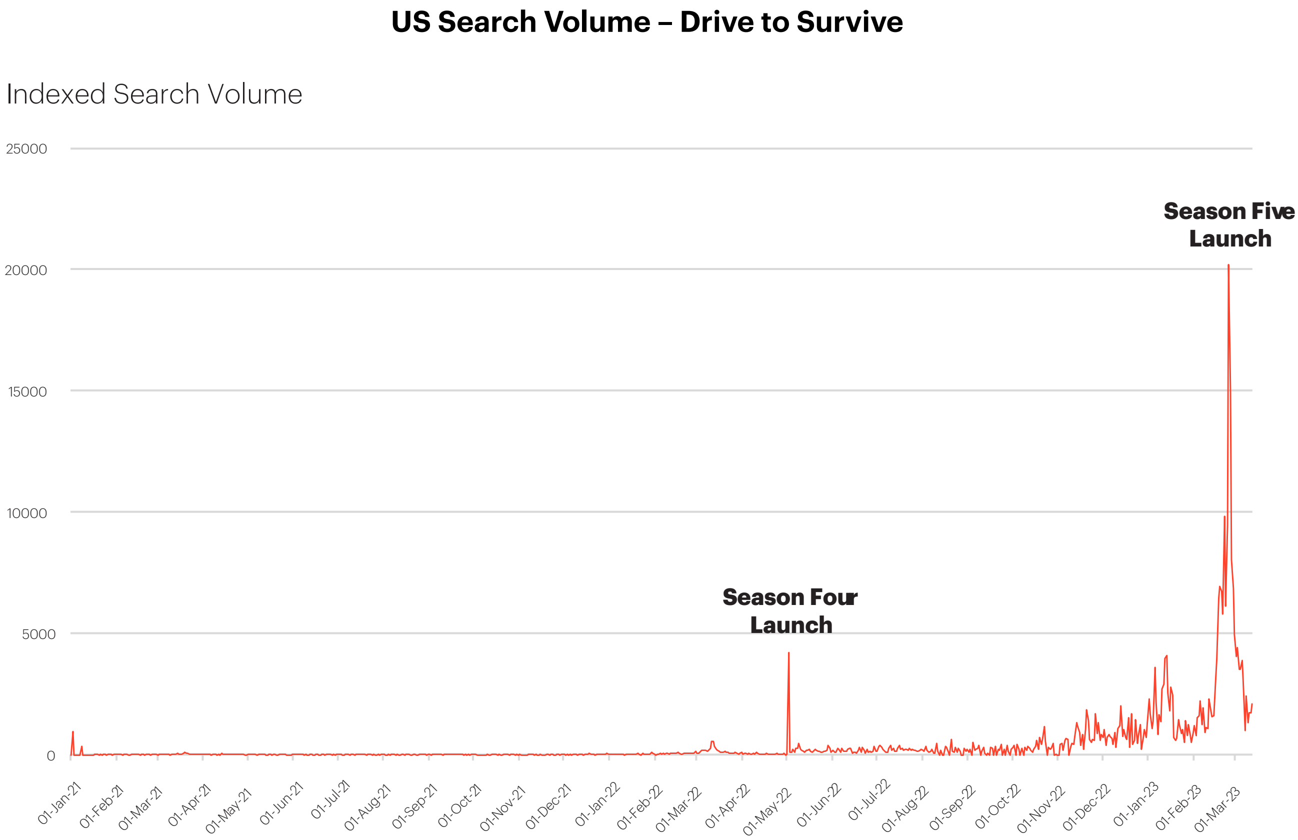


YouGov Signal data 1st January 2021-March 2023

In the US, where there is lower popularity overall for Formula 1, there was a slower trajectory of growth between 2021-2022, but popularity peaks tenfold for the most recent launch in 2023 compared to 2022.



YouGov Signal data 1st January 2021-March 2023

Reaching a large and engaged fanbase

Using **YouGov Safe** data, we can drill down further into the popularity of this sports lifestyle documentary to uncover how many are watching the show, the share of views, how many are binge watching, and identify who the viewers are demographically.

Exploring viewership in GB, over 6.8 million viewers have tuned in to watch 'Drive to Survive', with an overall reach of 127 million views of any season of the docuseries.

Looking at the share of views within the release week of the series, 'Drive to Survive' share of voice was 1.6%, with an incredible fifth **(20%)** of Netflix's audience having viewed the series. The introduction of the series converted more than 80,000 viewers to the platform. Engagement levels are also high in GB, with more than six in ten viewers **(63%)** watching at least 3 episodes in a row.

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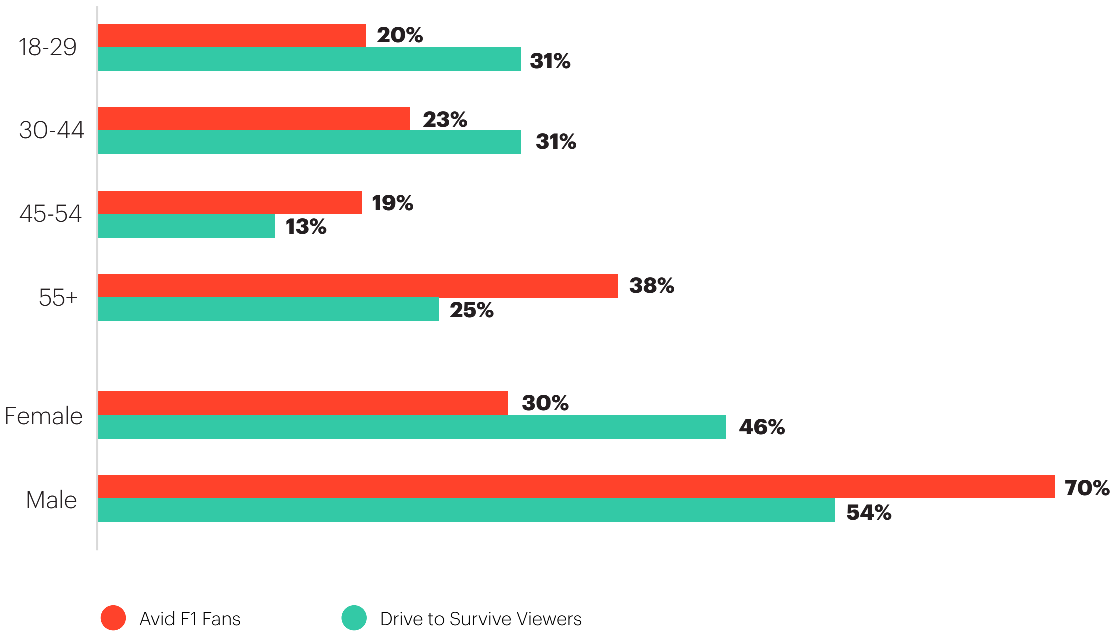
Speak to sales

Run a survey

Engaging a female audience with F1 content

Looking at **YouGov GB Profiles** and **YouGov Safe**, the age profile of 'Drive to Survive' viewers is younger than F1 sports fans, and while F1 fans are predominantly male **(70%)**, the gender split for viewers of 'Drive to Survive' is more balanced **(54% male/46% female)**. This suggests that lifestyle sports content offers the ability to expand the reach of broader sports content by newly engaging female viewers. Sports-lifestyle content also presents an opportunity to engage non-sports fans. GB YouGov data shows that a quarter of 'Drive to Survive' fans have no interest in F1 **(26%)** but are tuning into the show, casting the net beyond followers of the sport.

Demographic profile of GB Avid F1 fans and GB Drive to Survive Viewers



YouGov GB Profiles and GB YouGov Safe data (based on views all seasons from launch to date)

Summary

Fan engagement high: Fan engagement with sports has changed dramatically, evolving from watching on traditional linear television to streaming services. Following sports on social media. The accessibility of content via mobile devices enables fans to connect and interact with sport anytime and anywhere. While two thirds globally have engaged with sports content across various platforms, 18-24-year-olds and males are hyper engaged, with content consumption increasing to three quarters.

TV maintains its global stronghold: In an ever-changing media landscape, watching live sports on TV ranks as the most popular way to engage with sports globally, but popularity is higher among older age groups.

Younger fans prefer digital over traditional: Social media ranks as the top way 18–34-year-olds engage with sport, and they over index on other digital platforms such as online, via streaming services or video games.

Social media leads in Asia: Despite the global dominance of live TV for sports, in Asia, social media is the primary choice for consuming sports content across all markets, driven by high social media penetrations and younger populations.

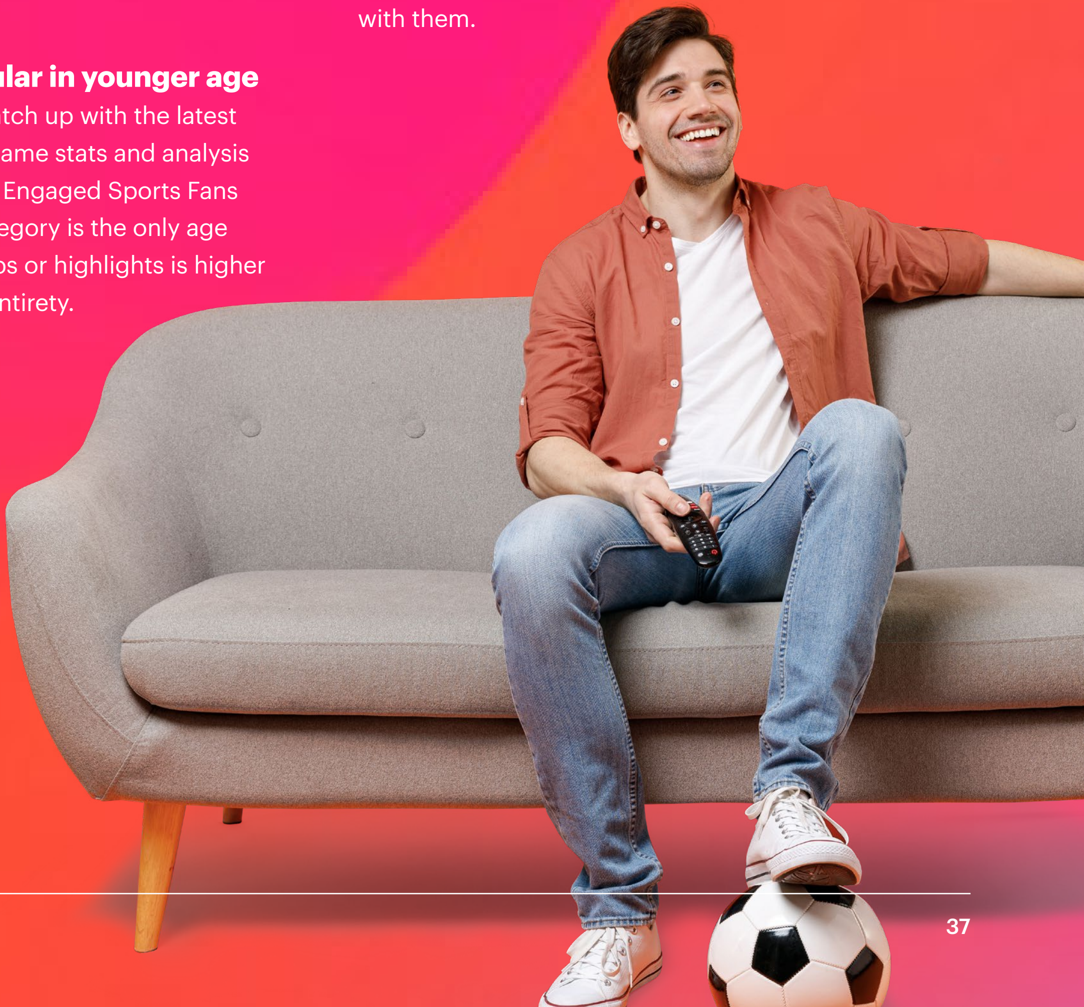
Bite size content more popular in younger age groups: Short-form content to catch up with the latest events, pre-game interviews, and game stats and analysis is the format of choice for younger Engaged Sports Fans consumers. The 18–24-year-old category is the only age group where the preference for clips or highlights is higher than watching live games in their entirety.

Sports subscriptions increase the volume of sports consumed: Of the fifth that subscribe to a streaming platform or service to gain access to exclusive sports content, their subscription is encouraging them to watch more. Seven in ten report that with a subscription offering exclusive sports content they are more likely to watch sports.

The sports lifestyle content net continues to widen:

The rise of subscription services has helped widen the audience of sports content and stimulate investment in new sports formats. Documentaries such 'Drive to Survive' can expand reach by appealing to more female consumers, and even those with little or no interest in F1. This widens the net for sports organizations, teams, and athletes to build their brands and connect with a new fanbase.

As the sports content ecosystem evolves, it will be important for sports organizations to understand and recognize the changing expectations and interactions that consumers have with different platforms and content formats and identify the best ways to engage with them.



Data

The insights in this report are drawn from a recent global YouGov Survey to understand the challenges and opportunities for sport in an evolving media landscape, how the consumption of sports content is changing, and what sports organizations should do to adapt to changing media behavior.

Our research covers 18 global markets of more than 19,000 respondents. The survey results were further bolstered by connecting respondent level YouGov Research data to YouGov's proprietary syndicated data solution for the sports industry specifically.

Our survey was fielded from the 11th November to 30th November 2022. The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted with mild weighting using interlocking demographic characteristics. For this report the following population representation was used:

Region	Market	Sample type	Sample Size (n=)
North America	US	National representative	**1,550**
North America	Canada	National representative	**1,014**
North America	Mexico	National representative (urban focus)	**1,062**
Europe	GB	National representative	**2,082**
Europe	France	National representative	**1,007**
Europe	Germany	National representative	**1,068**
Europe	Spain	National representative	**1,014**
Europe	Denmark	National representative	**1,023**
Europe	Italy	National representative	**1,030**
Europe	Poland	National representative	**1,007**
Europe	Sweden	National representative	**1,019**
APAC	Australia	National representative	**1,052**
APAC	China	National online	**1,043**
APAC	Hong Kong	National online	**515**
APAC	Indonesia	National online	**1,050**
APAC	India	National representative (urban focus)	**1,022**
APAC	Singapore	National representative	**1,059**
MEA	UAE	National representative	**1,130**

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Thank you

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