



# The many faces of sports fans across Europe

How the perceptions, attitudes and make-up of sports audiences vary across Europe



DENMARK

FRANCE

GERMANY

ITALY

NORWAY

SPAIN

SWEDEN

UK

# INTRODUCTION

There can be a tendency among many of us to assume that Europeans are all similar – that we all share more or less the same or similar outlooks and attitudes to the world, that we all consume and behave in similar ways. After all, from brands through culture to sport, we share much of the same hinterland.

Sports marketers are not necessarily any different and, in the absence of data to the contrary, many campaigns are rolled out without regard for the nuances of the individual markets that lie across the continent.

This report is designed to help marketers by revealing some of those differences through the data we collect every day.

It looks at eight markets – Denmark, France, Germany, Italy, Norway, Spain, Sweden and the UK– and highlights a handful of important differences in the way sports audiences look, behave and respond.

**DENMARK****FRANCE****GERMANY****ITALY****NORWAY****SPAIN****SWEDEN****UK**

# Tools of our trade

We've developed a wide range of tools for use specifically in the sports sector. Here's some information on the ones we've used for this report. You can find more information on our [website](#).

## SYNDICATED · **PLANNING**

**Planning and profiling tools to help users understand their fans or target audience and how to reach them.**

### YouGov<sup>®</sup>Profiles

Profiles allows you to create a specific audience – affluent football fans, for example – and, using thousands of data points, see the world through their eyes. Reveal their habits, attitudes and behaviours to help your brand.

### YouGov<sup>®</sup>GlobalFanProfiles

Drawing from SportsIndex, BrandIndex and Profiles, Global Fan Profiles provides a high-level view of the sporting world, with interactive profiling of consumer 'fandoms' across the globe at any one point in time.

## SYNDICATED · **TRACKING**

**Our tools track public perception of the world's biggest brands, leagues, and events – every day.**

### YouGov<sup>®</sup>SportsIndex

SportsIndex operates in 34 markets across the world, tracking 200 key domestic and international properties across 30 sports. 16 brand-style metrics track the health of the world's leading sports leagues and events.

### YouGov<sup>®</sup>BrandIndex

This services tracks thousands of brands daily against 16 industry-standard metrics across 40+ product sectors in 38 markets.

What are Europe's  
**most *popular***  
sports properties?



## EUROPE'S **MOST POPULAR** SPORTS PROPERTIES BY COUNTRY

DENMARK		
1	Tour de France <i>Cycling</i>	27.6
2	Superligaen <i>Men's first division football</i>	24.1
3	Formula 1	17.8
4	UEFA Champions League	15.1
5	English Premier League <i>Men's first division football</i>	13.3

FRANCE		
1	Tour de France <i>Cycling</i>	30.2
2	French Open / Roland-Garros <i>Tennis</i>	22.6
3	Coupe de France <i>Men's cup football</i>	20.1
4	UEFA Champions League	17.3
5	Ligue 1 <i>Men's first division football</i>	17.2

GERMANY		
1	Bundesliga <i>Men's first division football</i>	34.1
2	DFB-Pokal <i>Men's cup football</i>	23.0
3	German national men's football team	21.2
4	Formula 1	19.2
5	UEFA Champions League	18.2

ITALY		
1	Serie A <i>Men's first division football</i>	46.5
2	Formula 1	31.9
3	UEFA Champions League	23.0
4	MotoGP	20.9
5	Tour de France <i>Cycling</i>	12.1

NORWAY		
1	Tour de Ski <i>Cross-country skiing</i>	31.0
2	FIS Cross-Country World Cup	30.8
3	FIS Alpine Ski World Cup	22.8
4	Eliteserien <i>Men's first division football</i>	22.4
5	UEFA Champions League	21.1

SPAIN		
1	La Liga <i>Men's first division football</i>	48.7
2	Copa del Rey <i>Men's cup football</i>	32.8
3	UEFA Champions League	31.1
4	La Vuelta <i>Cycling</i>	26.2
5	MotoGP	25.9

SWEDEN		
1	FIS Cross-Country World Cup <i>Skiing</i>	14.2
2	Svenska Hockeyligan	13.0
3	Allsvenskan <i>Men's first division football</i>	11.9
4	Tour de Ski <i>Cross-country skiing</i>	9.1
5	IAAF World Athletics Championships	8.9

UK		
1	English Premier League <i>Men's first division football</i>	28.6
2	Wimbledon Championships	26.0
3	Six Nations Rugby Championship	25.2
4	The FA Cup	23.0
5	UEFA Champions League	19.2

**YouGovSportsIndex**

These rankings were collated using information from our **YouGov SportsIndex tool**.

They use our *Current Customer* metric which asks respondents if they watched or followed a sports event or league over the past year. The data shown is an average score for the last 12 months, and the numbers represent a percentage of the general population.

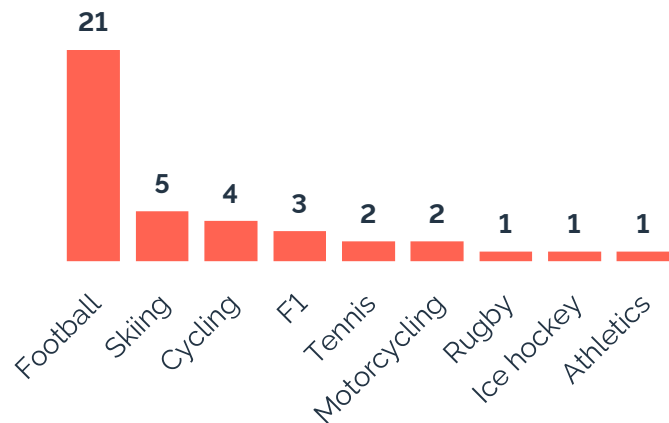
Highlighted properties are those which appear in more than one ranking



## EUROPE'S **MOST POPULAR** SPORTS PROPERTIES

### Europe's favourite sports

*The number of appearances each sport makes across all eight top-5 rankings*



YouGovSportsIndex

While football takes the top spot in four of our eight markets, a wide range of sports are represented overall. In fact, **nine different sports appear across our top fives** and skiing is the second most popular across our selection (see chart).

The **UEFA Champions League** is the **most popular individual property with a top-five place in seven of our eight country rankings** (with Sweden being the exception). The **Tour de France** and **Formula 1** come next, with three top-five rankings each.

Domestic top-flight football leagues make an appearance in every top-five ranking, making them the most reliably popular property. In all but one of our markets, its domestic football league is the most popular football property (in France, the domestic cup competition wins out).

For all the market share of rugby union in the UK, the **Six Nations tournament** doesn't make the top five anywhere else, including in France and Italy whose teams compete in it.

It is also worth remarking on the numbers involved. In Sweden, sport in general commands less interest. Its first-placed property (**FIS Cross-Country World Cup**) earns a popularity (14.2% of the population) which is beaten by five fifth-placed properties in other countries. Spain and Italy have the properties which pick up the highest scores – in each case their top domestic football league.

The UK has the smallest range in popularity across its top five (indicating a more even market share), while Italy has the largest range between its top- and bottom-ranking properties.

But being popular is not the be-all-and-end-all for sports properties.

**Leagues and events can offer other strengths**, like **value**, **quality** or **prestige**, all of which have **commercial value for marketers** and which we also therefore measure.

So let's take a dive into one of those qualities now to see how the views of Europeans differ.

## EUROPE'S **MOST PRESTIGIOUS** SPORTS PROPERTIES BY MARKET

Country	Most prestigious property
DENMARK	Summer Olympics
FRANCE	French Open
GERMANY	Bundesliga
ITALY	Formula 1
NORWAY	Winter Olympics
SPAIN	Davis Cup
SWEDEN	Summer Olympics
UK	Wimbledon Championships

*Ranking calculated by using an average Reputation score for the last 12 months.*

**YouGov**SportsIndex

As you can see from the chart on the next page, perceptions of prestige tend to be fairly steady, but variances can be accounted for by a wide range of factors including proximity (in time) to the event, matters related to athletes (for example, scandal), the success (or otherwise) of home athletes or teams and event marketing.

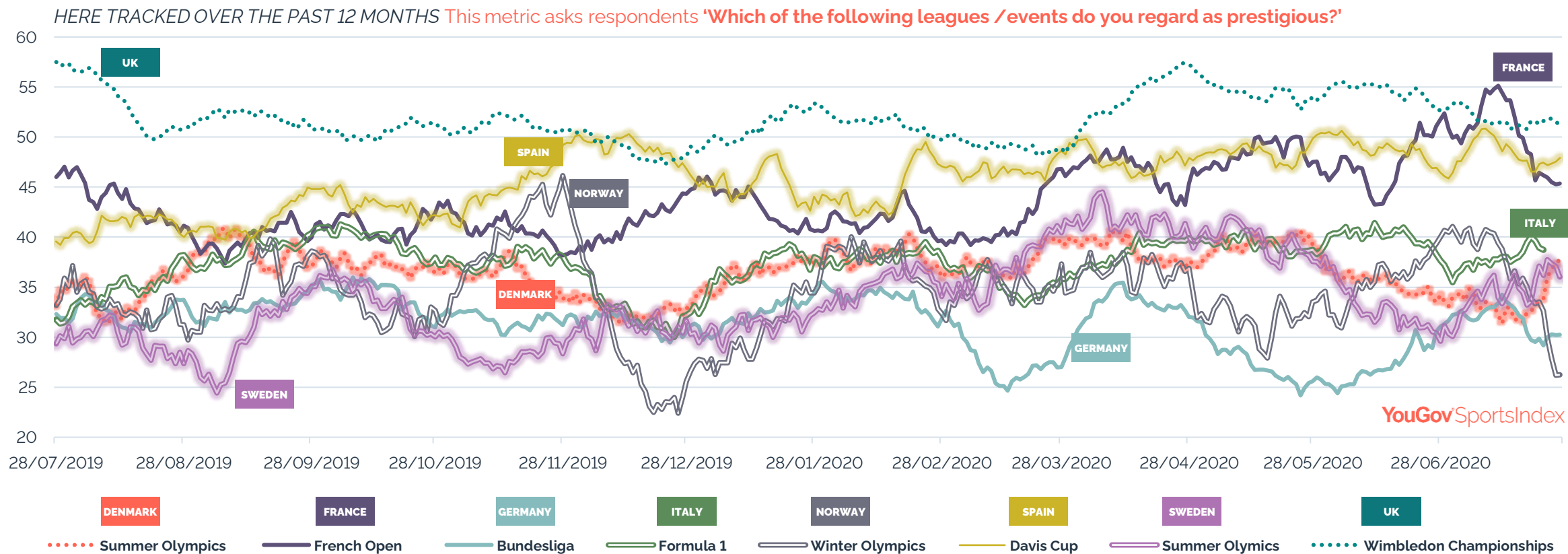
As the chart shows, Brits hold their number one event (**Wimbledon Tennis Championships**) in the highest regard, although French perceptions of **Roland-Garros** (French Open) and Spain's view of the **Davis Cup** have got close to Wimbledon's score over the year. It's interesting to note that while only two tennis events made it into our popularity ranking (Wimbledon and Roland-Garros), they make up three of our eight most prestigious properties. So what tennis loses in market share, it more than makes up for in prestige.

Norway's perception of its population's most prestigious event – the **Winter Olympic Games** – took a significant fall in December 2019 but has since recovered.

In Italy, **Formula 1** has taken a steadier trajectory across the year, as has the **Bundesliga** in Germany. Germany, incidentally, is the only country where a domestic league takes the honours for prestige. Plaudits must go to the league's administrators, here, for keeping the property evergreen in the face of annual, biennial and quadrennial events which turn the head of respondents in other markets.



## EUROPE'S **MOST PRESTIGIOUS** SPORTS PROPERTIES BY MARKET



In Sweden and Denmark, where the **Summer Olympic Games** rack up the highest prestige scores across the year, scores have gone up and down over our selected period – an effect typically caused by the success of other events during the year (which gain scores at the expense of the Games).

But in a lesson to sports marketers everywhere, it is fascinating that eight different markets come up with seven different views on which sports property is the world's most prestigious.

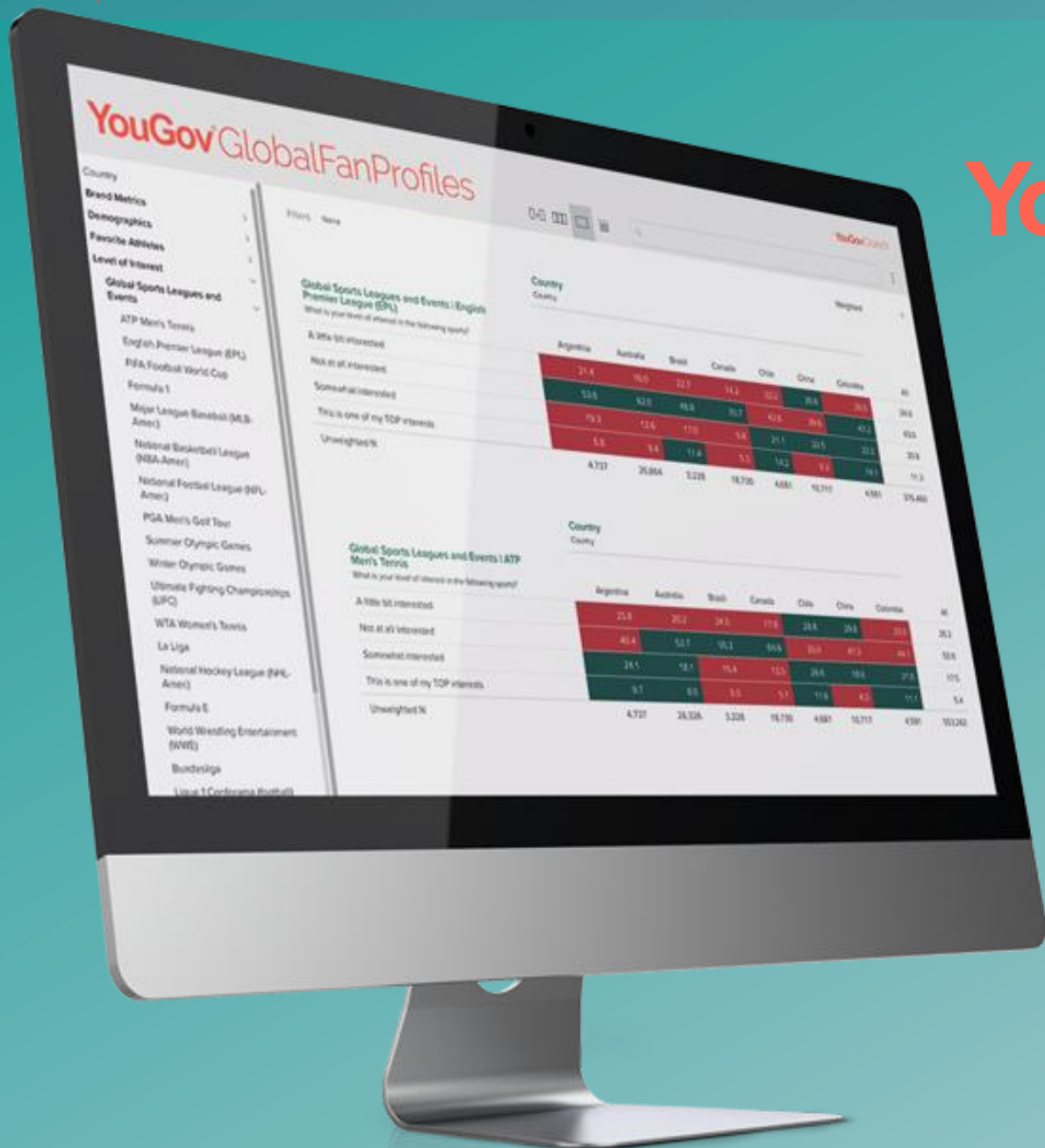
That's because ultimately, markets have different views on what makes something prestigious. For some, it's exclusivity – the finite availability of tickets, or the calibre of people who get those tickets. For others, it may be the wealth associated with those sports or property-owners.

How Europe's  
major football  
leagues stack up  
against each other.



As we've seen, **football continues to grab the eyeballs in our European markets**, with soccer properties taking 21 places from a possible 40 across our top-5 popularity rankings.

But looking at the continent's most prominent leagues, how do they perform across our selected markets?



# YouGov<sup>®</sup> Global Fan Profiles

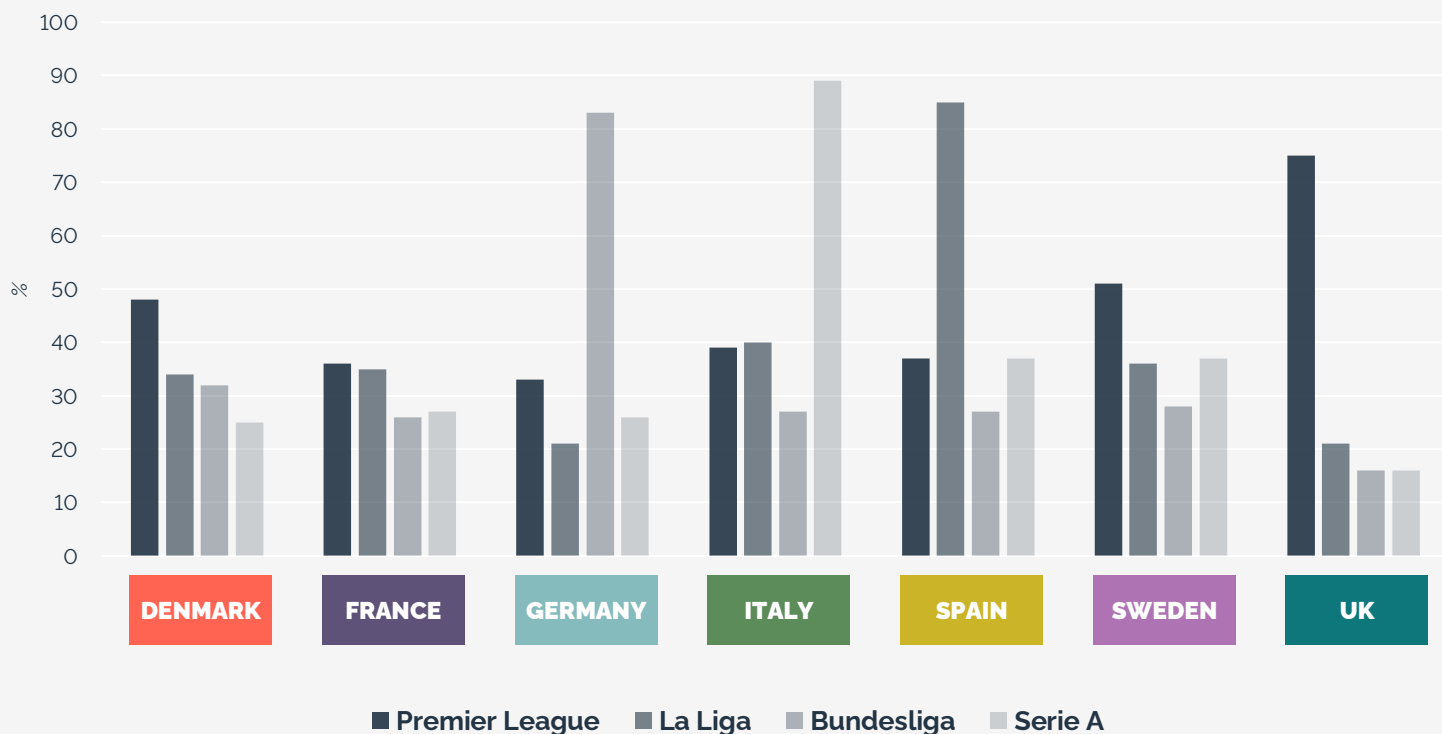
**We gather this information from  
our Global Fan Profiles tool.**

GFP allows marketers to instantly evaluate fanbases for major sports and competitions in a single market across the world, as well as profile those fans. The data gives them the ability to tune up strategies, assess successes and gauge progress against the competition.

## INTEREST IN LEADING FOOTBALL PROPERTIES ACROSS MARKETS

### Following by country of Europe's leading football leagues

% of people in each country that told us each league was one of their top interests or that they were somewhat interested



As you'd expect, football leagues tend to command most interest in their home markets. But let's look outside and see how the top properties perform away from home.

In countries which don't currently have their own major exporting league (Sweden, France, Denmark) the **Premier League** is the property which attracts most interest. But in countries that do, it's another story. In Italy, the Premier League is pipped by **La Liga**, while in Spain the two level-peg. Meanwhile, in the UK, the Premier League appears to smother interest in other leagues – interest is lower than in any other market and UK consumers are least likely to consume other leagues.

**Overall, the Premier League takes the largest share of interest, something that the league's marketers can take credit for.**

# DEMOGRAPHICS



What do sports fans look like across Europe?



**In this section, we take a look at fans across Europe** – what do they look like, how do they consume sport and what are their attitudes to it.

Sports fans are defined here as members of the public who have told us that they follow at least one of a list of major sports.

## YouGov Profiles

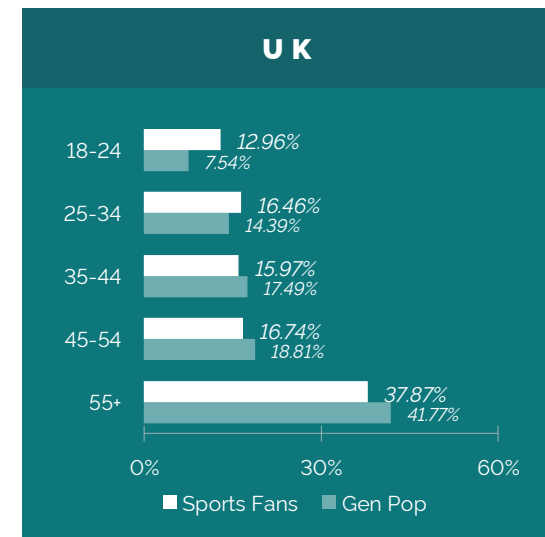
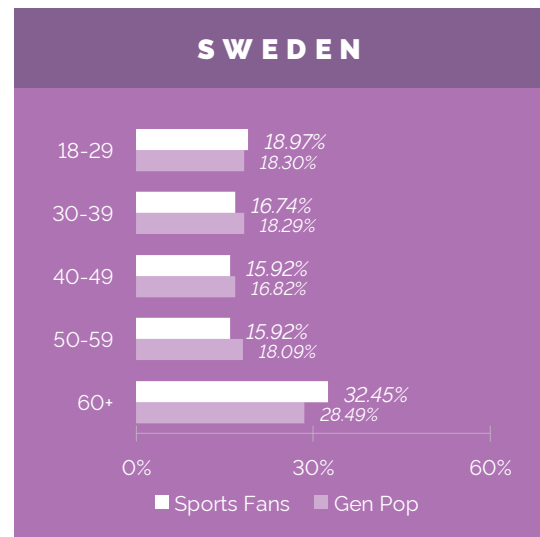
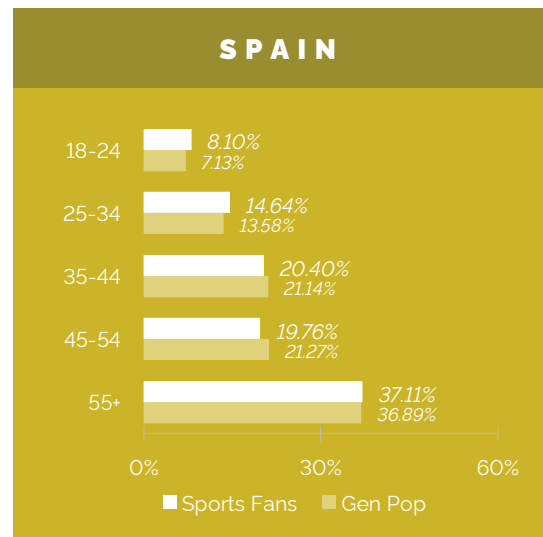
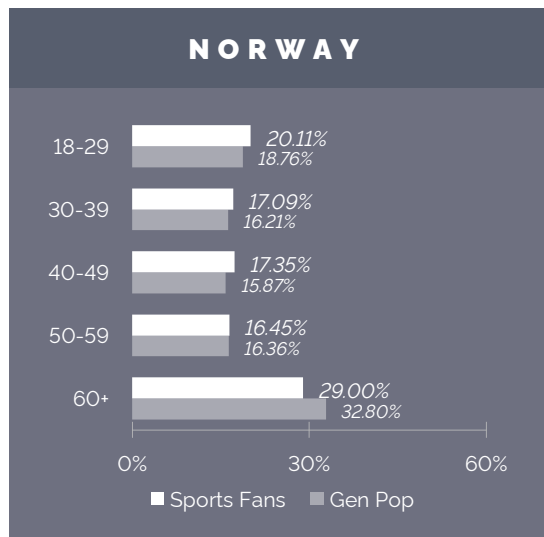
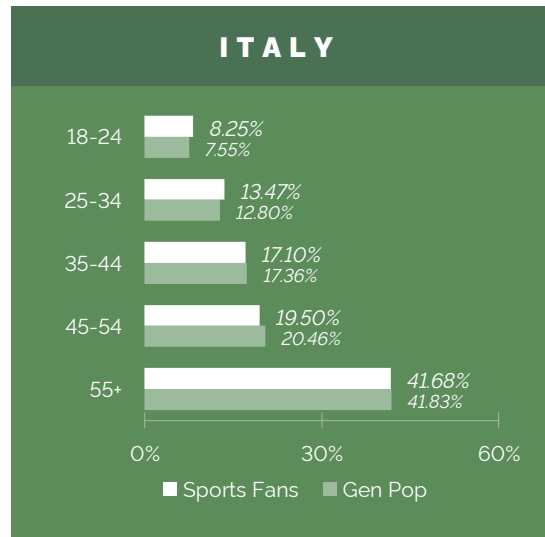
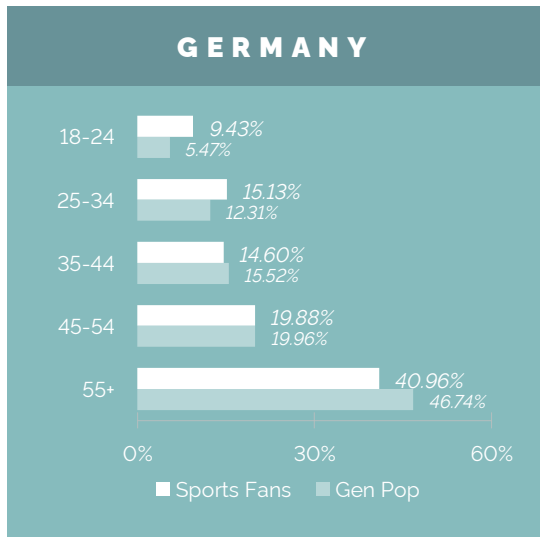
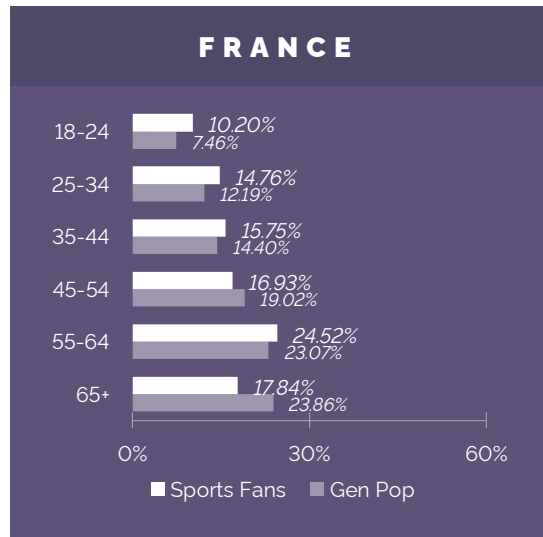
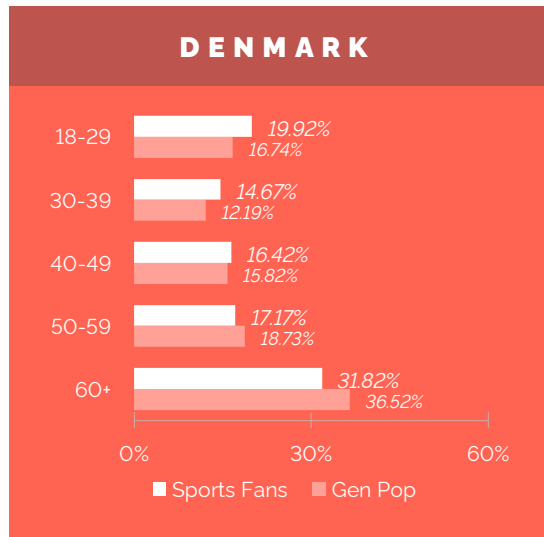
## YouGov Profiles

To dig into the demographics of fans of any given sport, or a group of them, we use our Profiles tool.

It allows marketers to build up complex pictures of almost every different type of fan within a specific market, including their demographics, habits, attitudes, brand preferences and behaviours.



## SPORTS FANS BY AGE | Here you can see the age distribution of sports fans in our selected markets.



## SPORTS FANS BY AGE

– The data shows a wide amount of variance between markets.



In almost all markets, people are less likely to be sports fans when they are younger and more likely when they are older.

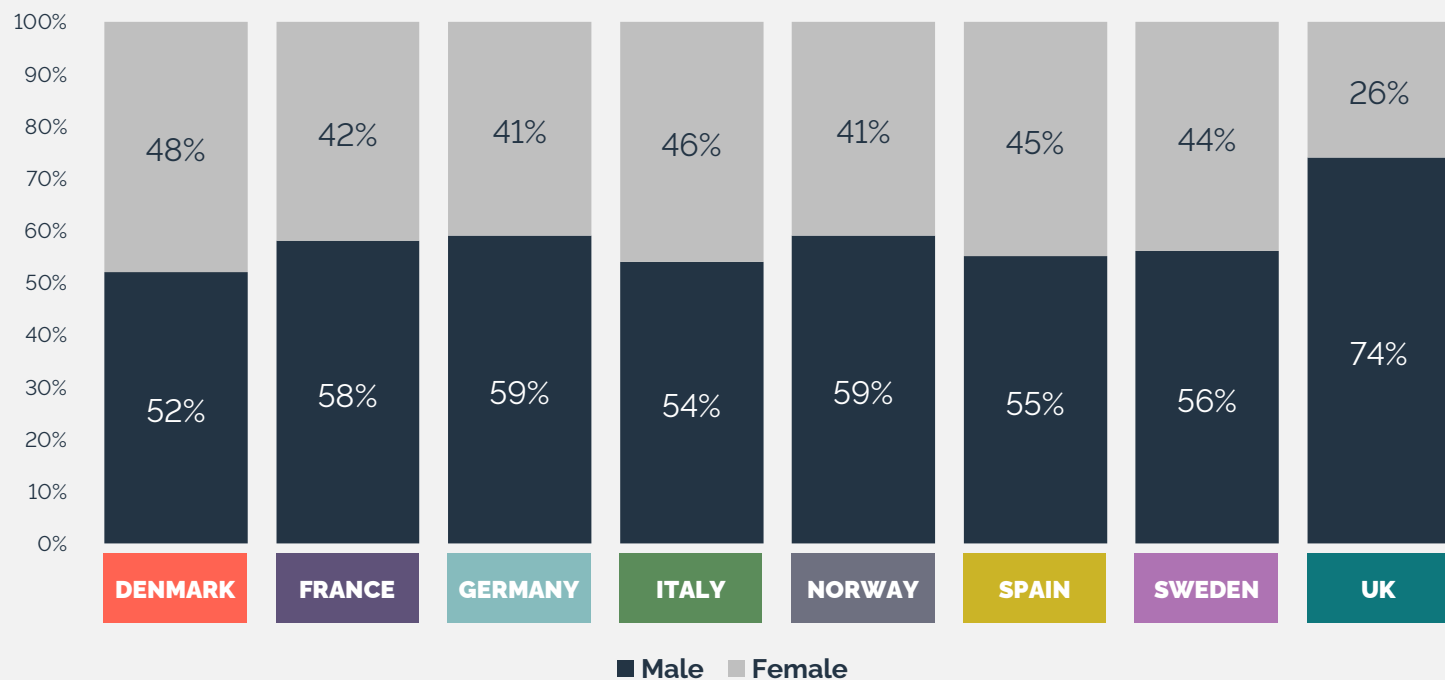
That's down to a range of factors. For example, younger people typically pursue a wider range of interests, consume media in different ways (ways don't necessarily lend themselves to sports consumption) and can't necessarily afford the costs associated with following a sport.

- > In the **UK**'s youngest age category, sports fans show the biggest under-indexing compared to the population.
- > **France** has the biggest over-indexing for sports fans – amongst the 65+ age group – but this may be because it's the only country with that age segment.
- > **Sweden** is the market with the biggest proportion of fans in the two youngest age category groups (note – not all age categories match), while **Germany** offers the smallest.
- > **Norway** and **Sweden** have the most even distribution of fans across age groups, while **Germany** and the **UK** have the least even.

## SPORTS FANS BY GENDER

– As well as fanbases varying by age across our countries, they also differ in gender make-up too.

Sports fans in each market by gender



The **UK** has the most lop-sided fanbase, with only 26% of all fans being female.

All our other markets are more equal, with **Denmark** the closest to achieving parity.



# MEDIA CONSUMPTION

Now we've identified a number of the differences between fans in our markets, let's take a look at **how fans consume media differently.**



# YouGov<sup>®</sup>Profiles

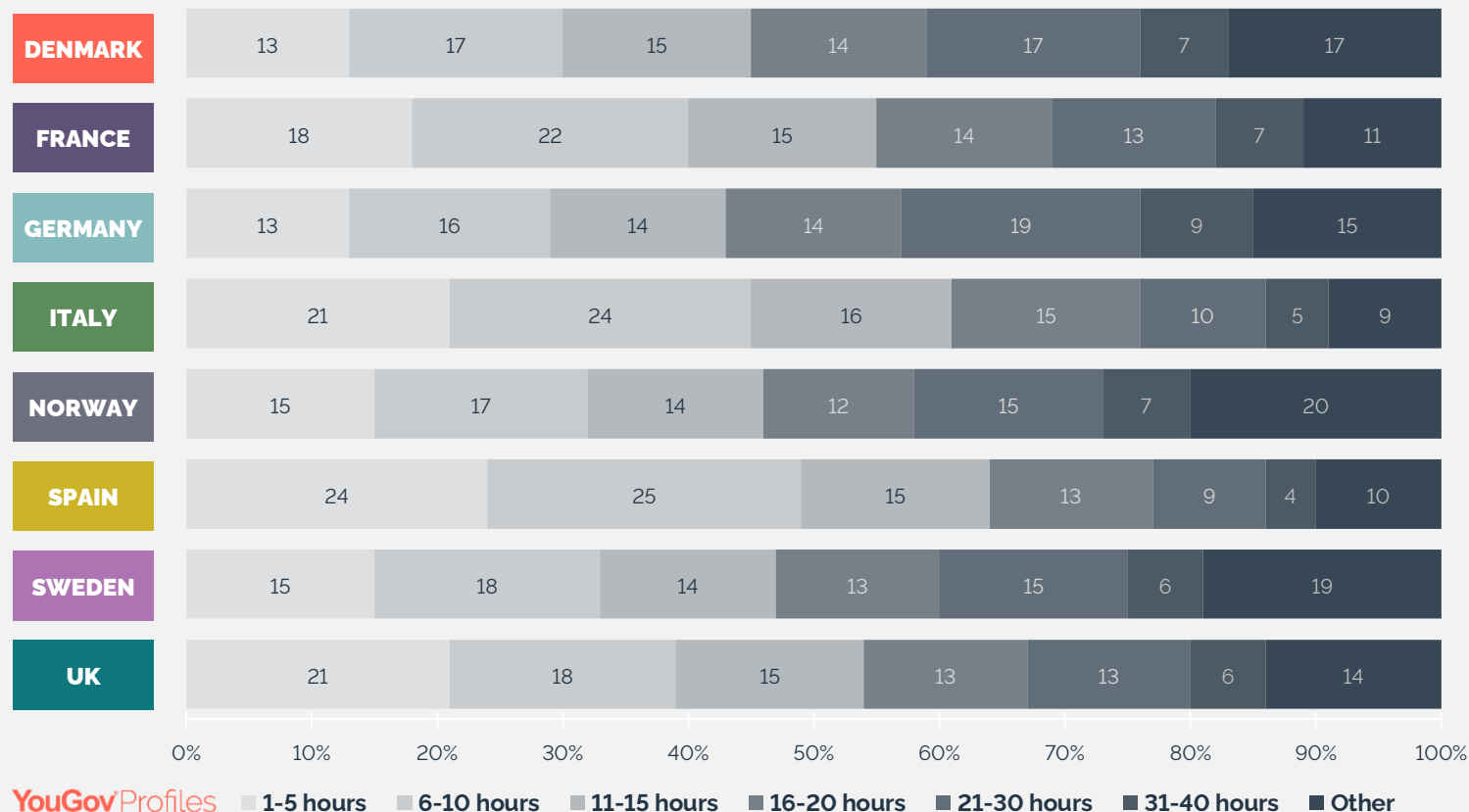
**Our Profiles tools allows us to select virtually any segment of society** (for example, dog-owning, city-dwelling cycling fans), but we've chosen to stick to fans as a general group.

And while Profiles allows us to drill down into vast details on media habits, including frequency, medium, in-home and out of it, we have just chosen a few headlines.

# TV CONSUMPTION AMONG SPORTS FANS

How much time do sports fans in each country spend in front of the TV?

Banded by hours, %



First of all, let's look at what remains the king of sports consumption media – the TV.

**German** sports fans are much more likely to watch longer stretches of TV – about 15% more than the next biggest watchers: **Danish** fans.

Conversely, **Spanish** sports fans are much less likely to watch large amounts of TV and more likely to watch more modest amounts. Almost 50% watch a maximum of 10 hours per week.

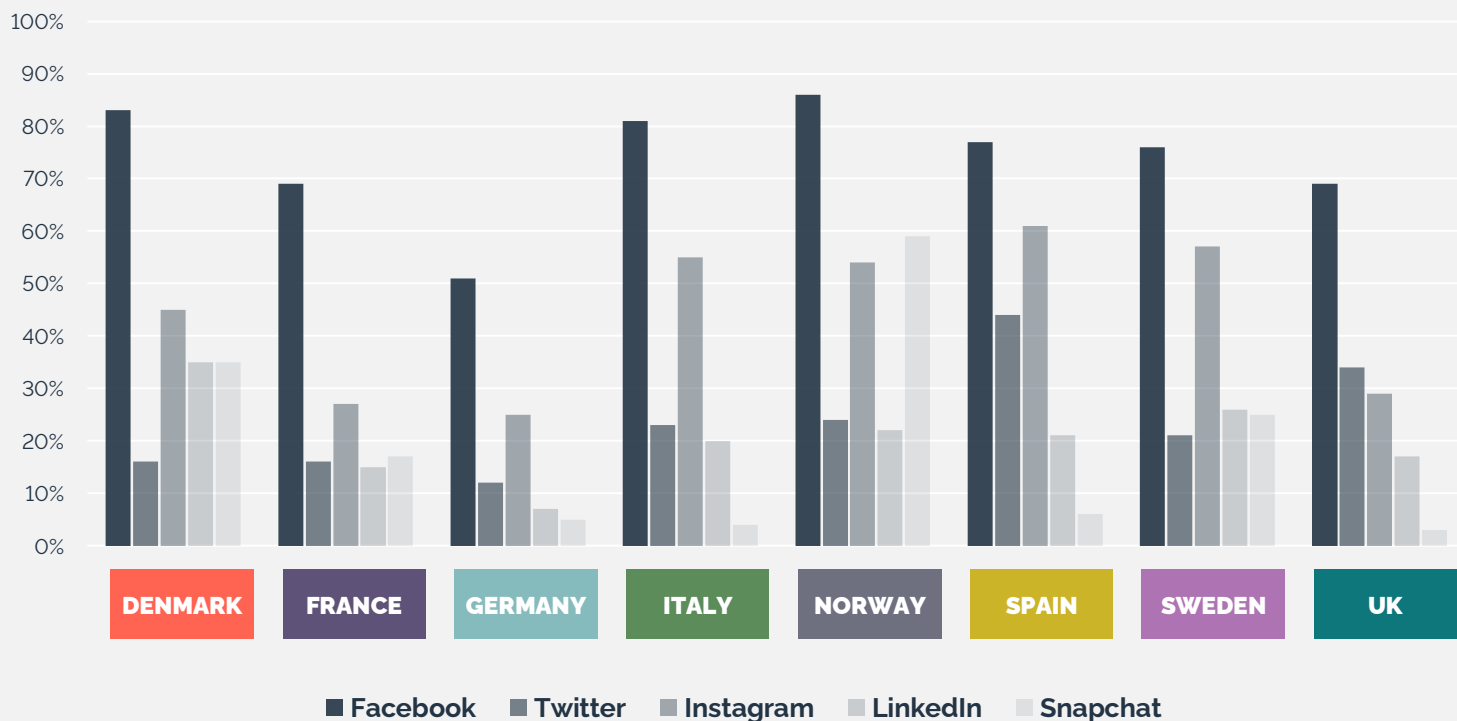
**Norwegian, Swedish** and **Danish** TV viewing habits are almost identical amongst sports fans, with every band apart from 31-40 hours being roughly equally popular.

Generally speaking across our markets, the behaviour of sports fans closely matches those of the general population.

## SOCIAL MEDIA PREFERENCE AMONG SPORTS FANS

### The differing consumption of social media by sports fans across Europe

*Which of these sites have you visited in the last month?*



Now let's talk about the channel coming up on the rails of TV – social media.

The penetration of social media varies widely across our eight markets but one thing stays the same – **Facebook's** popularity. Sports fans are significantly more likely to have visited Facebook in the past month than any other site.

**Instagram** is the second favourite social media platform for sports fans in five of our markets – while **Snapchat** is pretty huge in **Norway**.

**German** fans are less likely to use the social media 'big five' generally (although professional networking site, **Xing**, and **Pinterest** – neither shown here – beat **LinkedIn** and **Snapchat** for popularity). German sports fans are much more likely (23%) not to have visited any social media sites than fans from any other market.

Meanwhile in **Denmark** at least 30% of all fans have used four of the five big platforms at least once in the past month. In **Sweden**, **Instagram** is twice as popular among sports fans as it is in **France** and **Germany**.

**Spain** is the only country where the three most popular platforms are each visited by more than 40% of sports fans. In **France**, all other platforms are dwarfed by **Facebook**, with only **Instagram** reaching over 20% of sports fans in the past month.

The rise of new platforms like **TikTok** have the potential to change this picture but with sports fans tending to be older, the adoption of new technology can take time to feed in.

# How do people watch live sports?





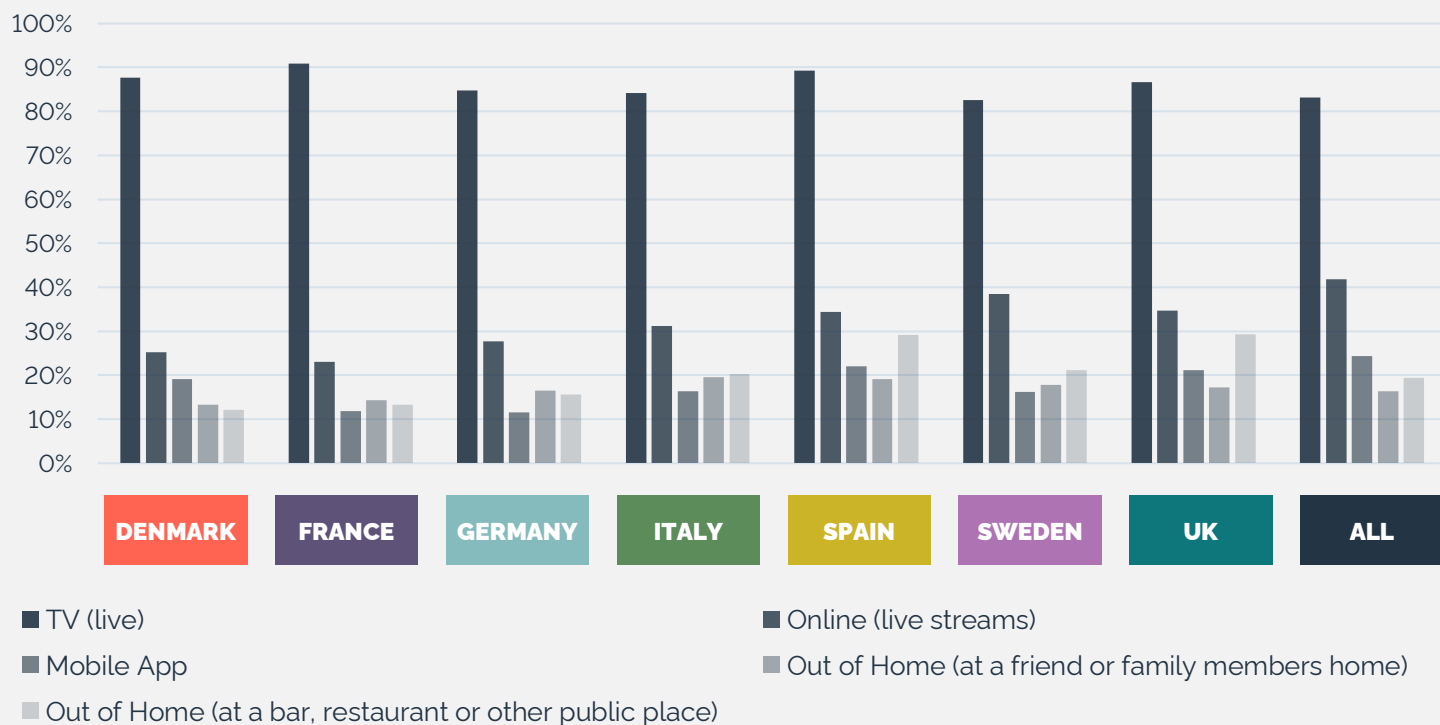
**Just because sports fans visit social media or watch TV, it doesn't mean that that's where they prefer to consume their sports content.**

So we thought we'd look at the data we collect on how people watch sport – in particular *live sport* – in each market to discover whether these habits differ.

# LIVE SPORTS CONSUMPTION HABITS

## Live sports consumption, popular mediums

Which, if any, of the following do you use as a means to watch/follow sport? Tick as many as apply - %



As you can see, at home on TV remains the most popular consumption option for fans of all nationalities but beyond that there is real variance.

For example, **Brits** and **Spaniards** are around a third more likely than the **French** and **Danes** to use a **live stream**, while **Swedes** are around 50% more likely to do so.

Likewise, **Swedes**, **Spaniards** and **Italians** are significantly more likely to watch out of home – whether that's at a friend's house or in a bar, restaurant or other public place. The **Danes** are least likely to do so.

**Brits** are most likely to watch sport in a bar, with almost a third of them (29%) saying that they do so. Of all markets, both **Brits** and **Spaniards** are most likely to watch via a mobile app.

# BRAND PREFERENCE

# YouGov<sup>®</sup>BrandIndex

**We track hundreds of brands in every market, every day.**

Using our BrandIndex tool, sports marketers can identify sponsor best fit, assess sponsorship impact on brand perception, evaluate operational sponsorships among European sports fans or simply see how their competitors are performing.

BrandIndex covers a whole range of sectors, from retail, through airlines to consumer electronics but in this section we look specifically at two sectors which are widely involved in the sports marketing and sponsorship world – Automotive and Banking.

**In our first set of charts, we look at Net Positive Impression for the two separate sectors – among sports fans and among the general population.**

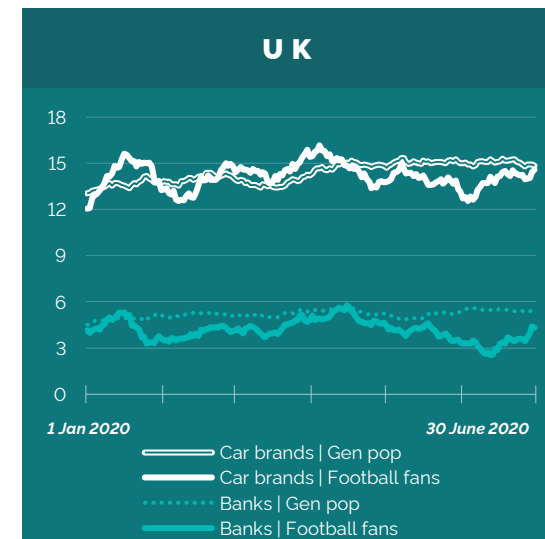
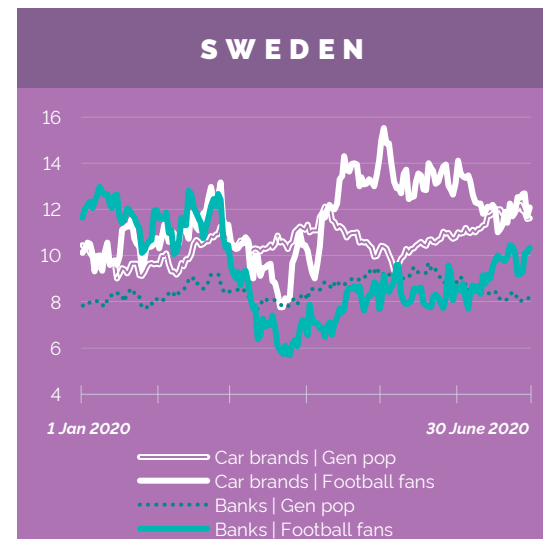
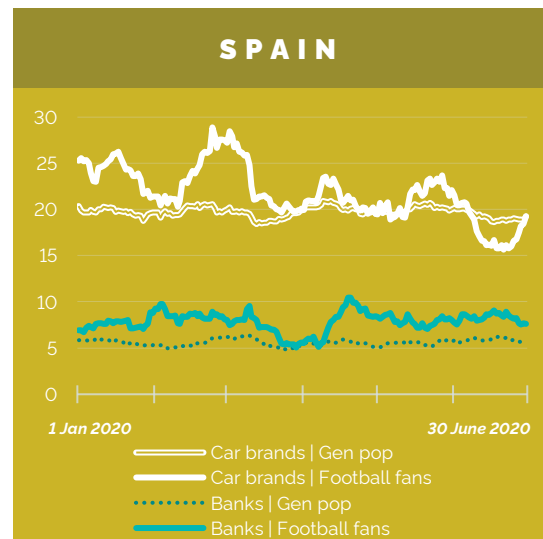
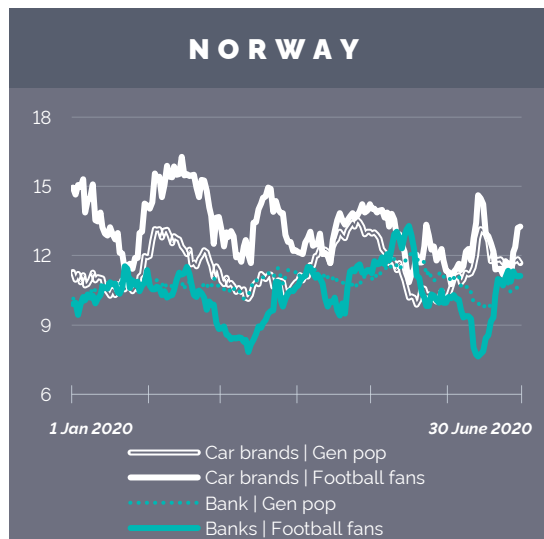
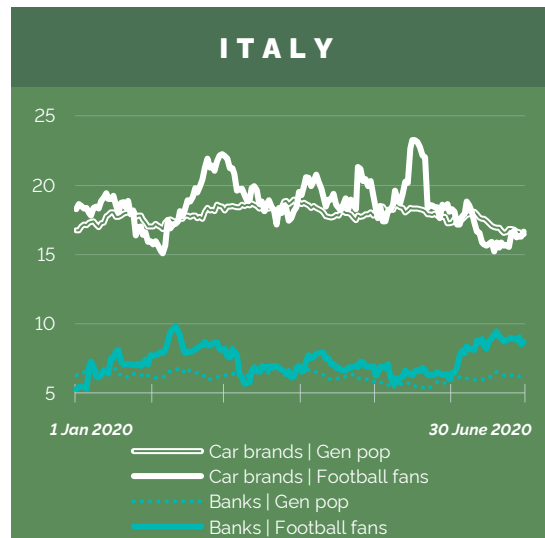
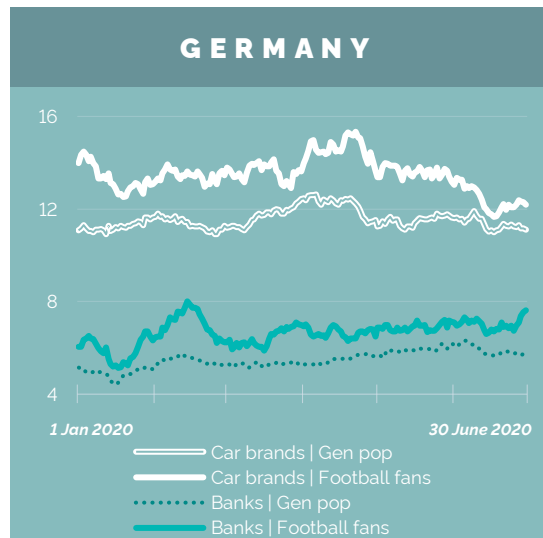
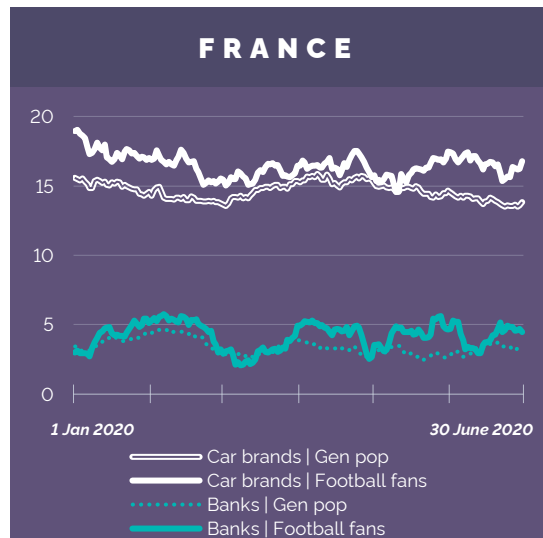
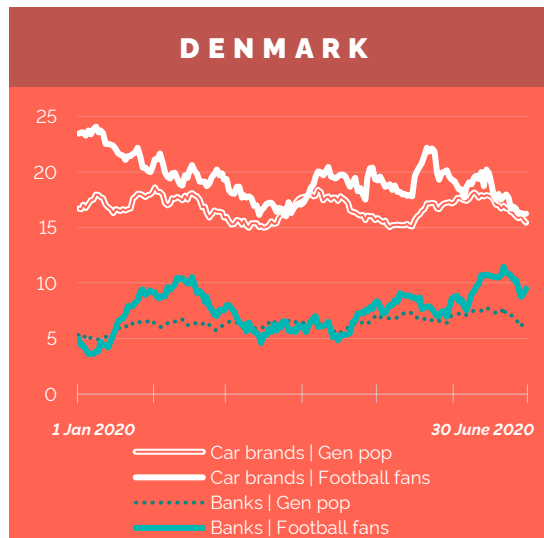
The scores for each sector comprise of the average combined score for all brands within that sector (so for car brands, the average of all the individual brands we track in that sector).

We show how markets respond differently to marketing and how, within those countries, sports fans respond differently still.

Where the views of sports fans differ from those of the general population, we can infer that fans are simply different people who think differently OR that their perceptions are impacted by sponsorship and other forms of sports marketing ... or (most likely) a little of both.

## NET POSITIVE IMPRESSION for auto and banking industries – general population and football fans by market.

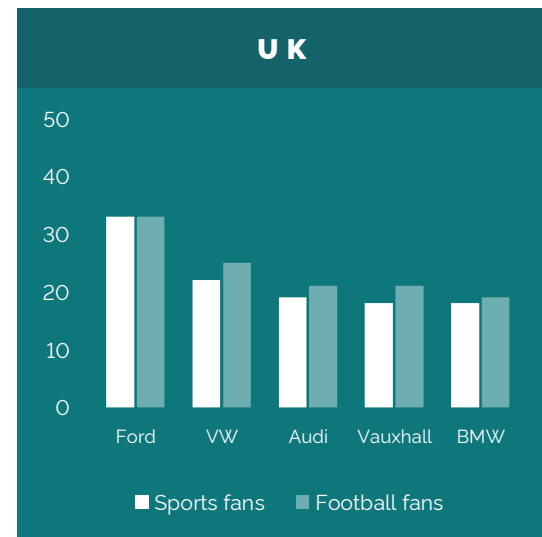
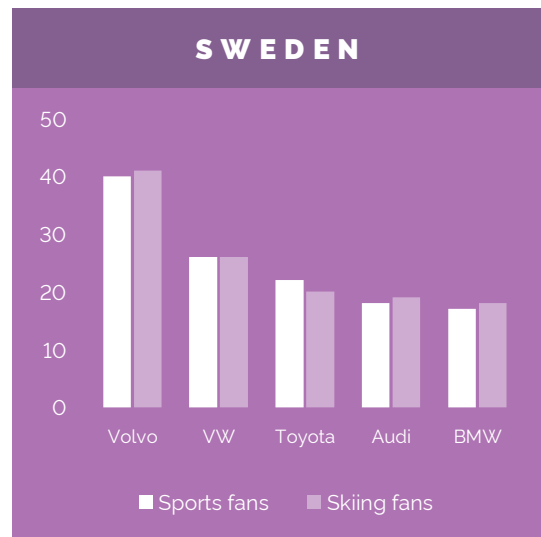
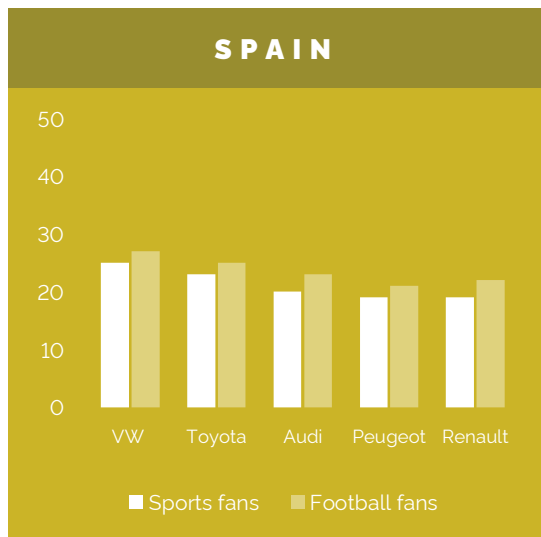
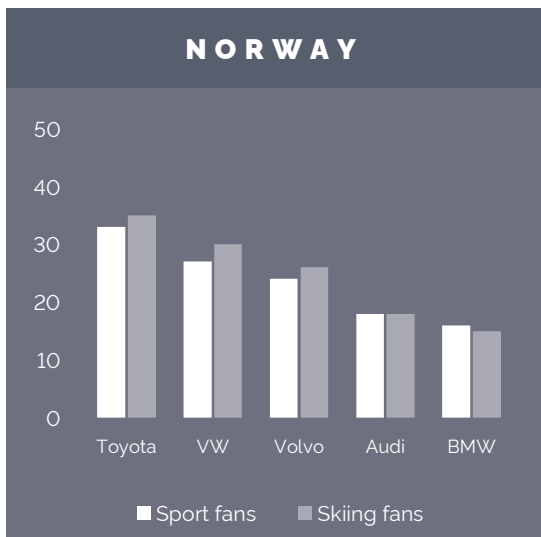
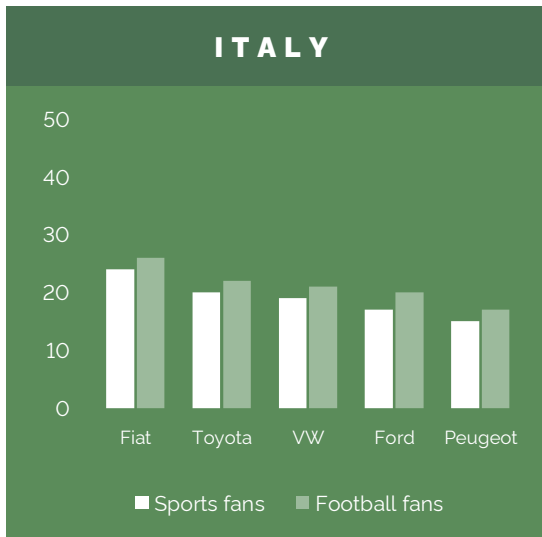
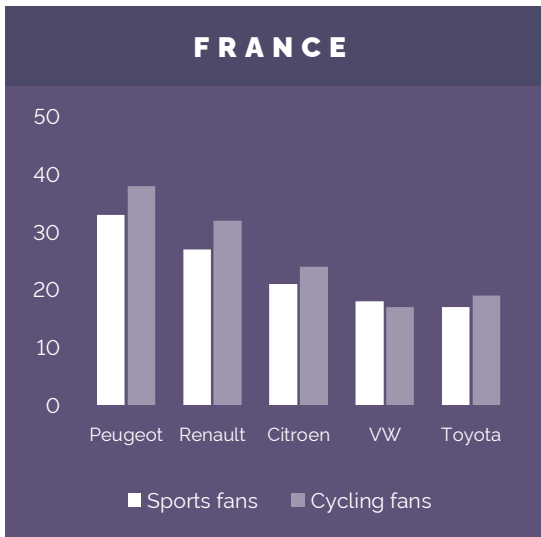
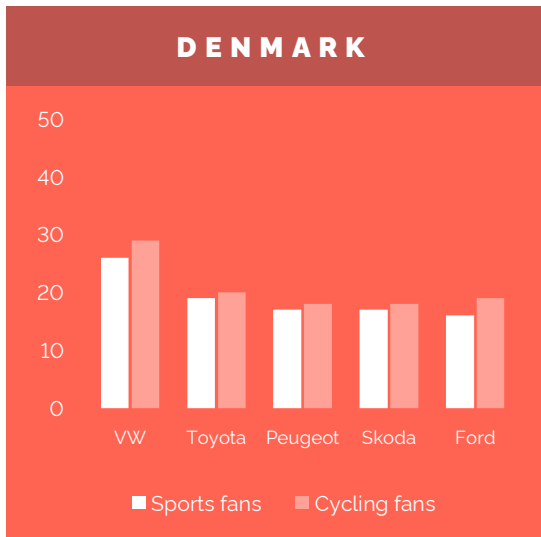
Of these brands, which do have a positive/negative impression of? Net %





## CAR CONSIDERATION AMONGST SPORTS FANS – all sports fans and fans of each market's most popular sport (as per P5).

When you are in the market next to purchase a car or van, from which of the following you consider purchasing? %

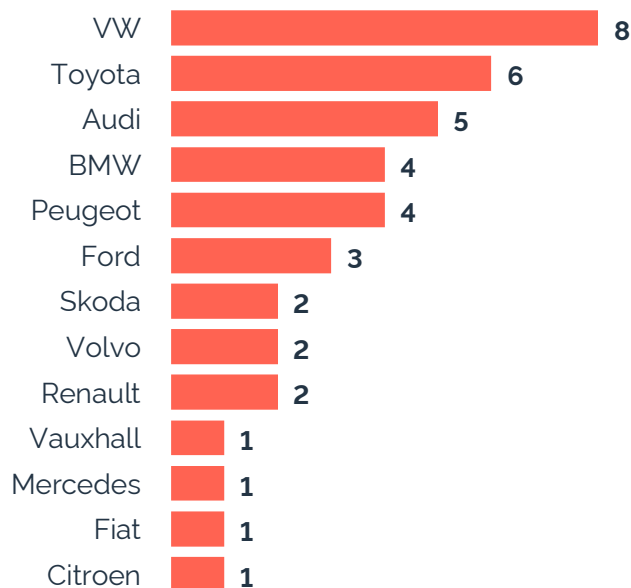


## CONSISTENT PERFORMERS ACROSS EUROPE

– but bias towards the home side in every country and every sport

### Most widely-considered car brands among sports fans

The number of appearances each brand makes across all eight top-5 rankings



YouGovBrandIndex

Altogether 13 brands appear across our eight top-five rankings among sports fans – but only one appears in every country – **Volkswagen**. It appears in the top three in every market but one (France, where it is fourth).

**Toyota** is the next most popular choice across our markets, closely followed by **Audi** and **BMW**.

There is a significant amount of variance between markets. For example, in Italy **Fiat** is the top considered marque among fans (and football fans) but the brand doesn't appear in the top five for any other country.

Why does the *Consideration* of fans of a particular sport vary from fans in general? That will tell a different story in each market but a number of factors could be in play.

In **Germany**, for example, **Volkswagen** sponsor the national football team. In **France**, **Peugeot** has a long history of support for cycling, including sponsoring its own team (albeit that it no longer has much, if any, involvement in the sport). **Renault** too, was involved in cycling.

In Italy, the same family that owns **Fiat** controls **Juventus**, the country's most successful football team.

It may also be that fans of particular sports, like skiing or cycling, fall neatly into a specific demographic groups which are targeted more heavily by car marketers in those countries.

The most obvious factor, however, is a tendency towards domestic manufacturers – for example, Germans favour VW, Swedes Volvo, French Peugeot etc.

# SUMMARY

# Throughout our data, a theme emerges.

There are, of course, **similarities between our markets** – in the sports they watch, the ways that they watch them and the brands involved.

But there are also **significant differences** for the smart marketer to make use of – even between countries as geographically close as Sweden and Norway.

From **Norway**'s love of Snapchat, to **France**'s older sports fanbase, from **Germans**' propensity to sit in front of TV for long stretches, to **Swedes**' proclivity to watch away from home, there are simple, actionable insights which can be used to inform a sports marketing strategy – for brands, for media-owners and for rights-holders.

**We've always known that different markets like different sports, but this data also shows that fans are different people too, with different attitudes, habits and behaviours as well.**

**Treating them all the same is a common approach for big brands or rightsholders because it is economic and easy to do so.**

**But this data shows that even with a small insight, a practical change or two to tailor a marketing strategy to a specific market could deliver significant returns.**

# Contact Us

To find out more information about any of our products and services – or about any of the insights we provide in this report, please contact the relevant country lead.

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