

# Bunkum!



Only one event in world history has ever drawn an audience of 1 billion simultaneous viewers: the Beijing Olympics opening ceremony. Nick Harris uses new figures from the Premier League to help debunk some viewing myths

**A**t some point in your sporting life it's likely you will have heard a claim that a billion people are about to watch, or have just watched, a particular match or a day's play or an opening ceremony. It might relate to soccer, or an Olympics, or maybe rugby or cricket or the NFL, or NBA basketball or the Commonwealth Games. Sometimes the claims might be 2 billion, or even 4 billion. All of them will be bunkum.

In the entirety of human existence, only one event, of any genre, has ever drawn a genuine audience of 1 billion people watching at the same time: the opening ceremony of the Beijing Olympics on 8 August 2008.

It happened because of the coincidence of the world's most popular multi-sports event being hosted in the world's most populous nation (China, with 1.3 billion people), starting with a ceremony on local free-to-air TV, in prime time on a Friday, and on the most auspicious date in many years – on 8/8/8, with an 8pm start, in a nation where the luckiest number is... eight.

That sole example of a 'genuine billion' springs to mind in the wake of new research, *Premier League In Numbers*, published in association with Sportcal, using original research from Repucom and Populus and commissioned by English soccer's Premier League, which attempts to show for the first time the 'real' scale of viewership for the league around the world.

Instead of pinpointing solely the traditionally most common metric of live viewing (in-home, on TV, or 'IHTV', as it is known, as recorded by Nielsen, BARB and fellow respected ratings monitoring agencies), the research looks at nine key markets to attempt to quantify those watching in all other ways, either at home but not on TV, or out-of-home by any method. All those people watching via computers, consoles, smartphones, tablets and other mobile devices, at home or elsewhere, as well as on screens in public places, are known as the non-captured audience, or 'NCA' – meaning audiences that are not captured by traditional methods.

It is eye-opening work, and groundbreaking in as much as it is anti-hype and pro-realism. What it shows is that even with the NCA audience, you can forget billions per match, and think millions.

There is no doubt that the Premier League is the most popular sports league globally. The most persuasive argument for this is the bottom line: how much it sells for in how many places. In the current three-year rights cycle, 2013-14 to



2015-16, the Premier League has annual income of around £722 million (\$1.1 billion) a year from overseas rights alone.

That sum puts the foreign rights sales even of US giants the NFL and the NBA in the shade. The Premier League makes more from foreign rights alone each year than Italy's Serie A (\$941 million), Spain's La Liga (\$840 million), Germany's Bundesliga (\$551 million) and France's Ligue 1 (\$542 million) make from domestic and foreign rights combined each year.

Those figures come from the first year of the 2013-16 rights cycle in the respective markets. The Premier League's foreign rights for 2016-17 to 2018-19 are on course to earn more than £1 billion a year; and all its broadcast rights combined will be worth closer to £3 billion a year.

So the league is a clear market leader, and yet in terms of eyeballs, the viewing figures are nothing like as stratospheric as many people commonly - and wrongly - imagine. The fault for that lies not with the league but with long-held habits of gross exaggeration across the industry, which in turn become held as true by the public.

The new research looks at nine countries: the world's three biggest by population, China, India and USA; the UK as the 'host' market; Nigeria as Africa's biggest country and South Africa as a second key market on that continent; Thailand and Malaysia as fanatical Premier League followers from Asia; and Norway as a European nation with many long-standing fans of English clubs.

In the UK, the total live IHTV audience for the 154 league games screened by Sky Sports or BT Sport in the 2014-15 season was 183.7 million people, or 1.19 million per game on average. The research showed another 81.8 million (530,000 per game) watched in other ways, giving a 'real' total of 265.5 million, or 1.72 million per game.

The detailed breakdown for each market is fascinating, showing, for example, how 82 per cent of viewers in the UK watch games live at home, but 15 per cent of those who do so watch on computers or mobiles. In Nigeria, by contrast, only 47 per cent of viewers watch at home, with

53 per cent watching away from home, and 89 per cent of those watching in public places, often in huge multi-match 'viewing centres' for paying spectators. In China, meanwhile, 83 per cent of viewers watch at home but a majority of those (52 per cent) watch on computers, mobiles or tablets.

When it comes to the most popular teams, Manchester United featured in nine of the 10 most-watched games in the UK in 2014-15, Chelsea featured in all the top six most-watched games in Nigeria, and Stoke City (perhaps surprisingly) were in three of the top seven most-watched games in China.

Thailand's 10th most-watched match featured two sides that do not figure among the present 'giants' of the English game, Everton and Leicester City. Everton are sponsored by a Thai firm, Chang beer, while Leicester City are owned by a Thai company, King Power International.

These details and more, from each of the nine markets, illustrate in depth how more people in more places are engaging with the league in more ways than ever before. And of course it is the ownership of these sought-after rights in competitive pay-TV markets that earns the league its money. But it is instructive to note that despite all this, audiences remain millions big, sometimes tens of millions worldwide for a game, but never billions or anywhere close.

The reality is that very few sports properties reach levels in the hundreds of millions globally, even for the biggest occasions in their calendar.

Quadrennially the most-watched events in the world, in any genre, will be soccer's FIFA World Cup final, and the opening ceremony of the Olympic Games. They will each typically attract genuine live audiences of hundreds of millions, according to the likes of Nielsen and BARB, with figures compiled on a global basis by Initiative Sport + Entertainment, the company that is now known as Futures Sport + Entertainment.



Main picture, opposite: The opening ceremony at the Beijing Olympics 2008. Above, from top: Viewing figures for this 2007 game between Arsenal and Manchester United were hyped; viewing at 'out-of-home' locations is growing; The New England Patriots take on the Seattle Seahawks in the most-watched Super Bowl ever in 2015

#### WORLDWIDE TV VIEWING OF MOST-WATCHED EDITIONS OF VARIOUS SPORTING EVENTS COMPARED

EVENT	STATUS	EDITION	AVERAGE AUDIENCE	SOURCE
Olympic Games	Most-watched opening ceremony	Beijing 2008	1bn	Nielsen et al
Fifa World Cup	Most-watched final (Netherlands-Spain)	South Africa 2010	530.9m	Kantar Sport
Uefa European Championships	Most-watched final (Spain-Italy)	Poland-Ukraine 2012	299m	AP / Uefa
Uefa Champions League	Most watched final (Barcelona-Juventus)	Berlin 2015	180m	Reuters / Uefa
NFL	Most-watched Super Bowl (Seattle Seahawks-New England Patriots)	Phoenix 2015	160m (114.4m within USA)	AP / Reuters
Cricket World Cup	Most-watched final (India-Sri Lanka)	Mumbai 2011	c. 150m (135m within India)	TAM / Initiative

Rarely, other events will break the 100-million global viewers barrier, perhaps two events annually: the NFL Super Bowl, and the Uefa Champions League final. Most of the audience for the former will be within the borders of the USA, and most for the latter within Europe.

Why is this important? A key issue for the sports industry, from federations and governing bodies to event organisers, broadcasters and commercial partners, is how to make the most of whatever audience you have; how to maximise that, and monetise it. Hype and exaggeration have too often been the norm in audience claims and do nothing for credibility.

Fifa, soccer's world governing body, over-egged viewing data for years, claiming World Cup viewership in 1998, 2002 and 2006 (for the finals alone) of 1.3 billion, 1.1 billion and 715 million respectively. These were all between three and five times the substantiated reality, the genuine figures show. Fifa later blamed unreliable 'diary data', plus "a huge number of repeats, highlights and delayed showings," as well as guesswork for out-of-home numbers.

Sometimes outlandish claims are made on behalf of events by media eager to build things up, albeit without those involved trying too hard to knock those claims down. Before one Manchester United match against Arsenal in the Premier League in 2007 it was claimed before kick-off that 1 billion could watch. The operative word was 'could'. The true figure was that 8 million people watched the whole match live around the world (1.477 million of them in the UK), and 27 million people watched part of the game.

In other words, one 37th of the reported audience actually tuned in, and one in 125 of the claimed total watched it all.



Top: Ireland take on Argentina in the Rugby World Cup. Above: Liverpool take on Manchester United in the most watched game of the 2014-15 English Premier League season

In an increasingly global marketplace, chasing overseas eyeballs can lead to significant behavioural changes, including altered kick-off times. Is it worth it? In 2011, Real Madrid moved a Spanish Liga game versus Osasuna to midday in Spain to attract a big Chinese evening audience and then claimed that 60 million people in China alone watched. The reality of audited data showed the audience was actually 1.3 million, meaning the claimed audience was exaggerated by 50 times. Those kick-offs didn't become the norm.

More recently, some Rugby World Cup 2015 sponsors claimed that the tournament would be watched by 4 billion people. But given that the biggest single audience for any game in the tournament looked likely to be in the tens of millions globally, even a cumulative total for all 48 matches wouldn't total anywhere close to 4 billion. The notion that 4 billion different people would watch any of the matches at all, in any form, let alone actively follow it as a tournament, is risible when most of the world's population have little interest in rugby.

That isn't to say that the Rugby World Cup wasn't a huge success in its own terms, selling out more than 95 per cent of around 2.45 million available tickets despite average prices of more than £100 each, and gaining respectable audiences in unlikely places. As many as 350,000 people in Germany, a country with

virtually no rugby heritage, watched individual games featuring teams as diverse as New Zealand and Argentina.

Commercially the Rugby World Cup was a hit. In TV terms, diverse if small TV audiences were a sign of global growth. Size isn't all that matters.

As any federation or governing body with rights to sell knows, striking the right balance is fundamentally important to both finances and strategic growth. At one extreme, selling your rights to the highest bidder regardless of how small their (usually pay-television) audience will be is one option. At the other is making sure the rights go to a broadcaster, typically free-to-air, that will make them available to the largest audience possible.

If the Premier League's model until relatively recently was closer to the former, then modifications are under way. From the current 2015-16 season, following the lead of broadcasters in Africa, rights-holders in China mandatorily now show some free-to-air games each week. That is bound to lead to a surge in total live cumulative viewing from the 107 million in 2014-15 (or hundreds of thousands per game) to perhaps millions.

And that's not bunkum.

#### ENGLISH PREMIER LEAGUE: 10 MOST WATCHED LIVE GAMES 2014-15 IN NINE\* SELECTED MARKETS

MATCH	DATE	CAPTURED (IHTV) MILLIONS	NON-CAPTURED (NCA) MILLIONS	TOTAL MILLIONS
Liverpool v Man Utd	22 Mar 2015	9.61	6.31	15.92
Man City v Man Utd	2 Nov 2014	8.59	5.80	14.39
Man Utd v Chelsea	26 Oct 2014	6.28	5.19	11.48
Man Utd v Man City	12 Apr 2015	6.17	4.48	10.65
Man City v Chelsea	21 Sep 2014	4.80	5.62	10.42
Chelsea v Liverpool	10 May 2015	6.01	3.79	9.80
Man Utd v Southampton	11 Jan 2015	4.61	5.17	9.78
Leicester City v Man Utd	21 Sep 2014	6.04	3.61	9.64
Man Utd v Liverpool	14 Dec 2014	6.15	3.47	9.62
Arsenal v Man City	13 Sep 2014	5.55	3.56	9.12

\*Figures relate to nine markets combined only: China, India, USA, Nigeria, South Africa, UK, Malaysia, Thailand, Norway. Global audience would be larger

Source: Premier League In Numbers

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