

Spectator Sports - UK - April 2013

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"The 2012 Olympic Games provided a range of learning points for all spectator sports and how they can enhance their appeal and grow live audiences. However, their ability to act on these remains limited due to lack of regular events, football's dominance of sports media and financial pressures restricting consumers' ability to spend."

– David Walmsley, Senior Leisure Analyst

In this report we answer the key questions:

- What has been the early legacy of London 2012 for Olympic sports?
- Are fans beginning to turn against ticket prices?
- How can other sports step out of the shadow of football?
- What will be the role of mobile in spectator sport's media mix?
- Where can spectator sports gain most value from social media?

The year 2012 proved a major one for the UK spectator sports market in both its event attendance and live media segments, thanks to London's hosting of the Olympic Games and continued strong interest in the country's most popular sports.

The market's worst fears around the potential crowding-out effects of the Olympics were not realised, with the summer sports suffering attendance downturns – principally horseracing and cricket – affected as much by bad weather as rival attractions. Tennis was the year's big winner, but it remains to be seen whether the UK's more niche sports can capitalise on the Olympic opportunity as spectator interest quickly turns back to its staple diet of football.

This report examines current trends in the ways in which UK consumers watch live spectator sport, assesses their experience of the 2012 Olympic Games and attitudes towards both Olympic sports and spectator sports more widely, as well as identifying ways in which venues, clubs, governing bodies and their commercial partners can respond to the opportunities and challenges emerging.

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