

Spectator Sports: Inc Impact of COVID-19 - UK - November 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“COVID-19’s effective shutdown of the spectator sports market for more than three quarters of the year will cut consumer spending on event attendance by 79% in 2020.”

– David Walmsley, Senior Leisure Analyst, 6 November 2020

This report looks at the following areas:

- The impact of COVID-19 on consumer behaviour and market dynamics in spectator sports.
- The importance of sport’s social appeal in driving the sector’s recovery.
- The value of major events in the next normal of the post-pandemic period.
- The opportunities for market growth available through the convergence of physical and digital experiences around stadia and events.
- The need for sports other than football to cultivate interest among younger age groups.

The postponement due to COVID-19 of the summer’s Olympic Games, football’s EURO tournament and the Wimbledon Championships reduced spectator sports’ reach in what would normally have been a year of growth, with the last of those cancellations seeing cumulative tennis audiences shrink by 30%.

The pace of the market’s financial recovery will track the speed at which sports stadia are allowed to return to full capacity, but when they do so a combination of fan loyalty, excess demand for showpiece events and consumer desire for experiential leisure post-pandemic should keep attendances high, even against a backdrop of recession.

The main threat to the market’s recovery in 2021 and beyond is the prolonged exclusion of spectators from stadia, with the worst-case scenario being that some venues or clubs fail financially, leaving fans with fewer attendance opportunities to come back to.

The big opportunity of the next normal lies in focusing on the social nature of event attendance – one of the key facets of sport that was most-missed during its suspension, and one that can plug in to the heightened priority people have placed on staying in touch with family and friends during the COVID-19 pandemic by positioning venues as safe places for larger groups to meet as restrictions are eased.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Spectator Sports: Inc Impact of COVID-19 - UK - November 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

Key issues covered in this Report
 COVID-19: Market context
 Economic and other assumptions
 Covered in this Report

Executive Summary

Impact of COVID-19 on spectator sports

Figure 1: Short-, medium- and long-term impact of COVID-19 on spectator sports, 6 November 2020

The market

Market size and forecast

Figure 2: Forecast of consumer expenditure on spectator sports, 2015-25 (prepared on 6 November 2020)

Crowd controls cause crash in attendance

Figure 3: UK spectator sport attendances, by leading segments, 2018-20

Showpiece occasions to play key role in recovery

Figure 4: Attendances at major sporting events staged in the UK, 2014-19

Companies and brands

Long-distance athletics' blueprint for the future

Festival season to combine music with sport

The consumer

New social priorities play to sport's strengths

Figure 5: Higher priorities since the outbreak of COVID-19, 8-19 October 2020

Fewer viewers as major events are lost

Figure 6: Experience of live sport, July 2016-August 2020

Tennis hit by downside of Wimbledon effect

Figure 7: Sports watched live, July 2019 and August 2020

Sport-free summer sinks attendance rates

Figure 8: Event attendance, by sport, July 2019 and August 2020

Fans keep their eye on the ball

Figure 9: Spectator sport-related activities allocated more time in the absence of live events during the COVID-19 restrictions, August 2020

Big games and social viewing missed the most

Figure 10: Elements of spectator sports missed most during the COVID-19 restrictions (Net - any rank), August 2020

Fans split on return to stands

Figure 11: Intention to return to spectator sports stadia, August 2020

Cut-back calendar is costing pubs

Figure 12: Experience of watching live televised sport in pubs following the lifting of initial COVID-19 restrictions, August 2020

Issues and Insights

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Spectator Sports: Inc Impact of COVID-19 - UK - November 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Safe socialising will be key to COVID recovery
 Social connections a priority for sport and society
 Outdoors great for distancing
 Social before safe
 Remote competition can engage connected generation
 New formats aimed at new audiences
 Necessity is the mother of invention

The Market – Key Takeaways

Stadium shutdown slashes spending
 Prolonged closures threaten venues' futures
 Demand stays strong
 Big occasions key to post-pandemic revival

Market Size and Forecast

Closed doors shut down stadium revenues
 Figure 13: Short-, medium- and long-term impact of COVID-19 on spectator sports, 6 November 2020

Power of football and major events keeps market in growth
 Figure 14: Consumer expenditure on spectator sports, 2015-19

Crowd controls to determine pace of comeback
 Figure 15: Forecast of consumer expenditure on spectator sports, 2015-25 (prepared on 6 November 2020)

Market drivers and assumptions
 Figure 16: Key drivers affecting Mintel's market forecast (prepared on 28 September 2020), 2015-25

Experience of the last recession: Sport equipped to bounce back
 Figure 17: Consumer expenditure on spectator sports, 2007-12

Forecast methodology

Market Segmentation

Crowds plateau pre-pandemic
 Figure 18: UK spectator sport attendances, by leading segments, 2015-20

Football edges towards far-reaching reform
 Figure 19: English league football attendances, by division, 2015/16-2019/20

Horseracing held up by Cheltenham
 Figure 20: UK horseracing attendances, 2016-20

Cricket's bubble limits losses
 Figure 21: International and domestic cricket attendances, 2016-20

Rugby union hit by lack of international incident
 Figure 22: Premiership rugby union attendances, 2015/16-2019/20

Rugby League loses bulk of season
 Figure 23: Super League attendances, 2016-20

Market Drivers

**BUY THIS
 REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
 APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Spectator Sports: Inc Impact of COVID-19 - UK - November 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Free viewing fare pulls pandemic crowds

Figure 24: Peak broadcast audiences for selected live televised sports events, 2020

A record year for spending on stadia

Figure 25: Premier League and EFL football clubs' expenditure on stadia and other facilities, by division, 2016/17 – 2018/19

Sport's biggest occasions are key to market recovery

Figure 26: Attendances at major sporting events staged in the UK, 2014-19

Esports taking younger people's eyes off the ball

Figure 27: Frequency of playing video games, by generation, April 2020

Companies and Brands – Key Takeaways

Long-distance athletics offers a blueprint for the future

Summer of live sport is music to outdoor venues' ears

Social ticketing brings fans together

Launch Activity and Innovation

Athletics winning long-distance events

Outdoor viewing venues pool resources

Ticketing taps sport's social circles

Racing League under starter's orders

Brand building supports team building

The Consumer – Key Takeaways

New social priorities play to stadium strengths

Rain check for major events reduces market's reach

Wimbledon effect proves a two-sided coin

Main event absences damage attendance rates

Fans keep their eye on the ball

Big games and social viewing missed the most

Low-risk groups to lead return to the stands

Pubs lose out as calendar changes

Impact of COVID-19 on Consumer Behaviour

Out-of-home entertainment off the pre-Christmas menu

Figure 28: Leisure and entertainment spending intentions, 8-19 October 2020

Sports venues can see friends reunited

Figure 29: Higher priorities since the outbreak of COVID-19, 8-19 October 2020

Key spectator groups confident in ability to spend

Figure 30: Consumer sentiment towards personal finances in the year ahead, October 2019 and October 2020

Sports Fans

Fewer viewers in major events' absence

Figure 31: Experience of live sport, July 2016-August 2020

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Spectator Sports: Inc Impact of COVID-19 - UK - November 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Sports Watched Live

Tennis hit by downside of the Wimbledon effect

Figure 32: Sports watched live, July 2019 and August 2020

Methods of Watching

Lost summer of showpieces slashes attendance rates

Figure 33: Event attendance, by sport, July 2019 and August 2020

Preferences still for big screen experiences

Figure 34: Watching live sport on digital devices, by sport, August 2020

Sport During Lockdown

Younger fans stay more connected

Figure 35: Spectator sport-related activities allocated more time in the absence of live events during the COVID-19 restrictions, August 2020

Merchandise and media hit by lack of live action

Figure 36: Spectator sport-related activities allocated less time in the absence of live events during the COVID-19 restrictions, August 2020

Lockdown Sentiment

Major events the biggest miss

Figure 37: Elements of spectator sports missed most during the COVID-19 restrictions (Net – any rank), August 2020

Sport's social side at the heart of post-pandemic recovery

Figure 38: Missing watching live spectator sports in-home with family and/or friends (Net – any rank), by generation, August 2020

Returning to Stadia

Fans split on getting back in the stands

Figure 39: Intention to return to spectator sports stadia, August 2020

Returning to Pubs

Major event absences keep audiences away

Figure 40: Experience of watching live televised sport in pubs following the lifting of initial COVID-19 restrictions, August 2020

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com