

WE KNOW THE

DIGITAL SOCCER FAN

A 2017 study by *Gilt Edge Soccer Marketing*



Introduction & Methodology

Soccer's young and globally-connected fan base places the sport at the forefront of the digital and social media landscape. For the 2017 edition of our annual soccer fan insights report, we dig deeper into the digital habits of the American soccer audience. From the impact of cord-cutting, to social media platform use, to pirated viewing of soccer matches, the *Digital Soccer Fan Report* takes a closer look at eleven soccer fan digital consumption insights.

Consistent with previous years, Gilt Edge Soccer Marketing (GESM) interviewed 1,000 American soccer consumers (age 13 or older) gathering a broad range of marketing insights. Respondents completed an online questionnaire—available in English and Spanish—during a one week period in October 2016.

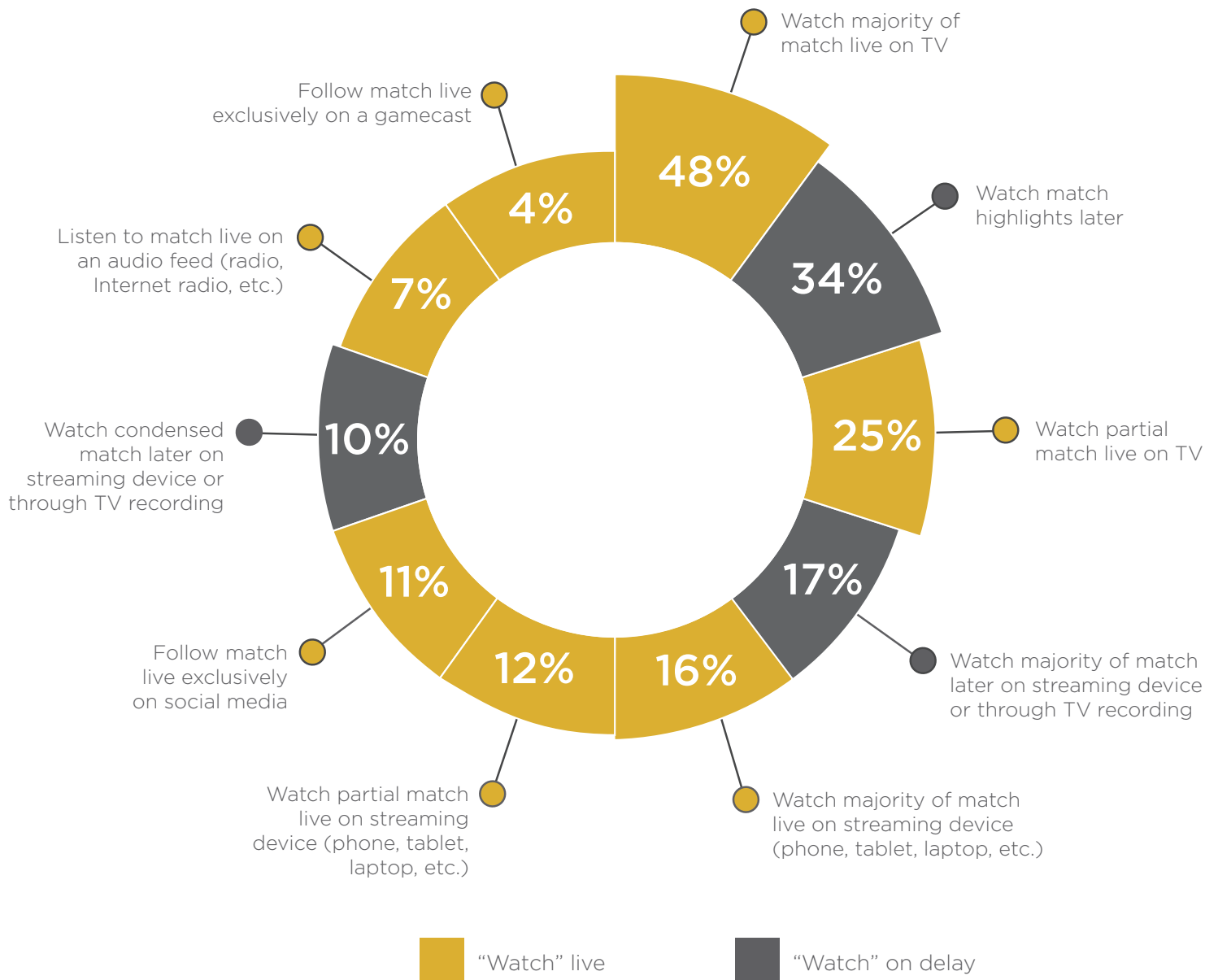
GESM is an independent soccer marketing agency providing a unique and impartial look at overall soccer interest and consumption in the United States.

Note:

Insights in this report reference "hardcore fans" and "casual fans." These classifications are based on respondents identifying their level of soccer interest on a scale of 1 to 10. Respondents indicating 8,9,10 rating are considered "hardcore" - respondents indicating 4,5,6,7 rating are considered "casual fans."

Insights also reference various Demographic Generations classified by age groups: Gen Z (13-17), Gen Y (18-34), Gen X/Boomers (35+).

Fans were asked how they typically watch/follow a soccer match, selecting up to 3 choices:



Redefining the Way to “Watch.”

From live vs. delayed viewing to following on social to streaming on multiple platforms, there are a myriad of ways to consume soccer in 2017. When provided ten ways to consume a soccer match and asked to pick the three that best represent their typical viewing behaviors, fans proved one thing through their selections—the combination of evolving digital technologies, shorter attention spans, and busier lives has created a highly fragmented consumption landscape.

It’s why “Watching” soccer is an idea that needs to be redefined.

Live consumption of soccer is still king with 48% of fans indicating they “watch a majority of a match live on TV.” “Watching partial match live on TV” was identified as the third most popular choice at 25%.

Interestingly, though, “watching match highlights later” ranked second (34%), showcasing the appeal, particularly among the younger fan base, of “watching” a match through quick-hit highlights.

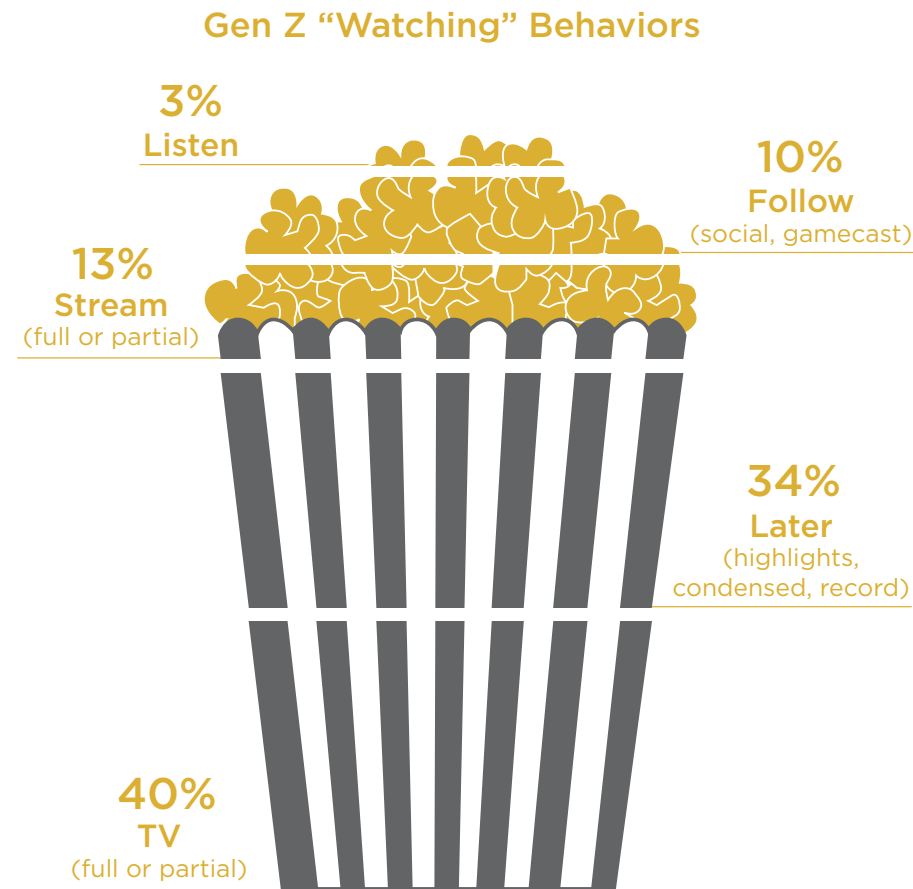
The Kids Like to Snack.

Where is this complex dynamic of match consumption the most visible? In Gen Z (13-17 year old) soccer fans. When asked to select up to three of the specific media platforms and time periods they allocate to soccer viewing, what they expressed is clear:

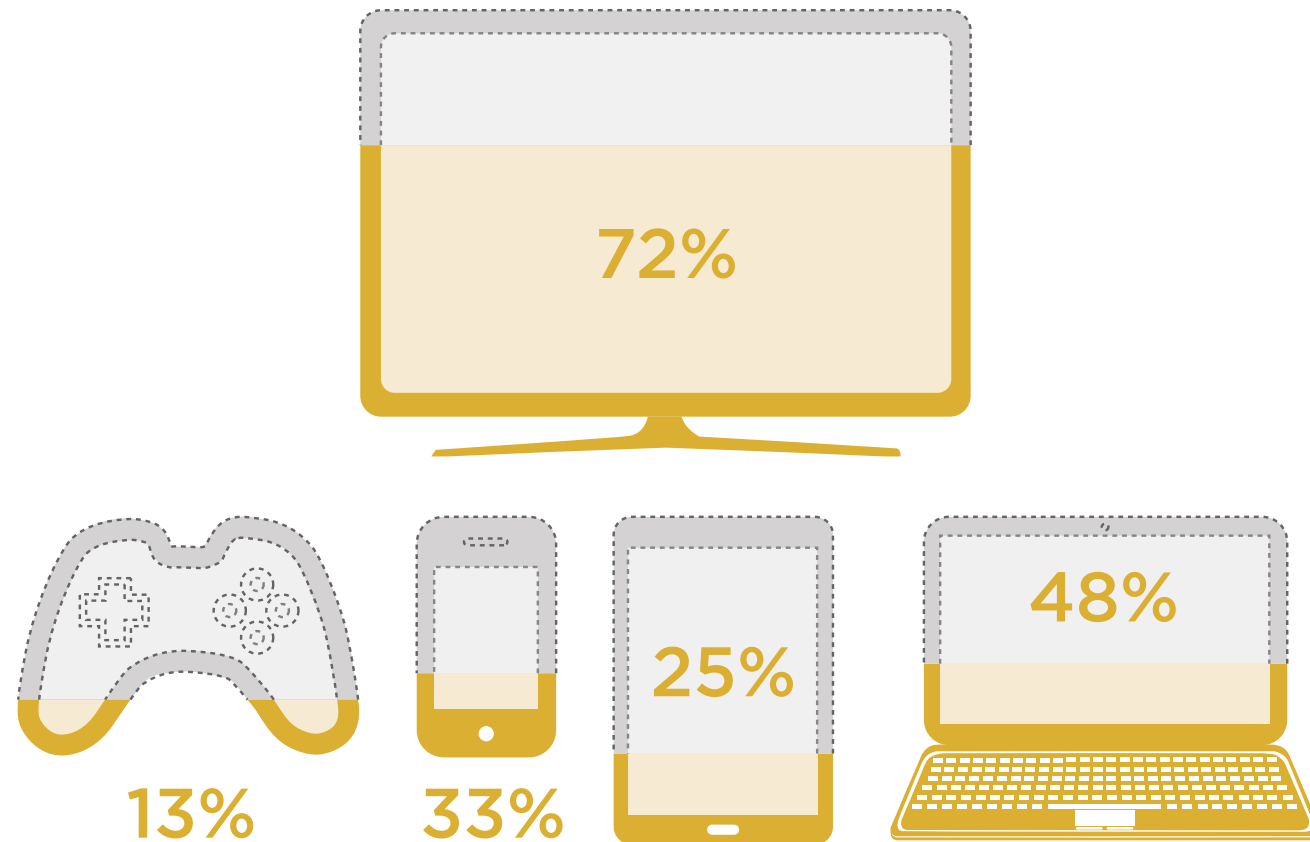
When it comes to soccer, they love to snack.

Looking at the entirety of Gen Z “watching” behavior, over a third (34%) indicated they don’t consume matches live—instead watching highlights, a condensed match, or a recording, at a later, more convenient time.

Only 50% of Gen Z indicated that watching the majority of a match live on TV or through a stream was one of up to three preferred consumption behaviors—the lowest of any generation.



Fans were asked what device they use to stream soccer matches, selecting all that apply:



TV Wins the Live Streaming Title.

With 87% of fans indicating they've watched a streaming feed of a match in the past year, **live streaming is now in the mainstream of soccer viewing**. Interestingly though, over 70% indicated that their TV—not their computer (48%) or mobile (33%)—is the main device they use for streaming.

Over-the-top (OTT) streaming devices with TV plugins (e.g. Roku, Apple TV, Google Chromecast, or Amazon Fire TV) are growing rapidly with 39% household penetration in 2016¹. Another OTT platform, fuboTV, a soccer-specific bundled offering of global leagues, has over 70,000 U.S. subscribers².

One club going all-in on digital streaming is Chivas de Guadalajara. The Mexican powerhouse is breaking the traditional TV model in Mexico and making its home games available exclusively via Chivas TV over the Internet and through their mobile app³.

Keeping the Cord to Catch Every Match.

As new viewing options become available to consumers, cord-cutting has grown in popularity. A recent GfK study indicated that 25% of U.S. households don't pay for cable and satellite services⁴. Soccer fans, though, seem more connected to the cord than average with just 20% indicating that they don't pay for cable and satellite services.

So what makes soccer fans different?

Nearly two-thirds (64%) say they need to pay for these services to follow their favorite teams, leagues and players around the world. With over 3,500 soccer matches broadcast on TV in 2016 across almost 90 different leagues/competitions, and on 40 different channels⁵, paid TV/Satellite subscriptions are still the simplest way to access the broadest swath of soccer programming. And with an average household income of \$70,000, most soccer fans can afford them.



80%
of soccer fans
pay for cable/satellite
subscriptions

64%
of this group feel
like they need those
services to access
soccer content
they want



Pirating is Still Prevalent.

Despite aggressive efforts by governing entities like the English Premier League to curtail distribution, watching an illegal match stream remains prevalent in soccer culture. Pirated streams have been available for well over a decade providing, in many cases, U.S.-based fans of international soccer with their only available access option. While access has expanded and most of the major international leagues are available extensively (every English Premier League match now available via NBC outlets, for example), there is still a content gap filled by pirate viewing. So who is the pirate streamer?

“As someone whose favorite team plays in a league that is not shown by a major network, the only way for me to watch my team is to use illegal streaming sites. I pay for cable and have access to some soccer channels, but illegal streams are a natural part of my soccer viewing.”

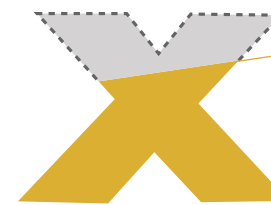
-Julian Farina, 28, Philadelphia



The pirate streamer is a passionate fan:

- follow/support 33% more teams*
- 46% more hardcore*
- 52% more interested in soccer than in previous years*

*Compared to non-pirate streamers



62%
of pirate streamers are from Gen Y

30%
of this group has pirate streamed a soccer game in the past 12 months.



Where's My Soccer News? It Varies by Age.

It's no surprise that 65% of fans get their soccer news and updates via social media. What is surprising is this: YouTube is an important go-to source.

While 10% of U.S. Adults get their news from YouTube⁶, 38% of adult soccer fans turn to YouTube for soccer news and updates—raising to 40% when all soccer fans are considered. Both Gen Z and Gen Y fans cite YouTube among their preferred social sites for soccer updates highlighting the appeal of video to the young, tech-savvy fan.

So YouTube is for younger fans, but what about more seasoned fans? Gen X and Baby Boomer fans still turn to “traditional” media like online search engines (Google, Yahoo, etc.), websites and apps.

Fans were asked how they regularly discovered soccer related news/updates online, selecting up to 3 choices:

	Gen Z	Gen Y	Gen X & Boomers
	49	42	30
	21	48	48
	29	35	43

Major League Soccer

Home Videos Playlists



Uploads



2017 MLS SuperDraft presented by adidas | LIVE
116,714 views • Streamed 2 days ago



HIGHLIGHTS: Team Control | a
2,853 views • 3 day

Social Media Use, Home and Away.

Social media is the perfect companion for watching live soccer and soccer fans agree. Nearly 75% say they use social media during a game.

As platform favoritism continues to fragment, there's a belief that fan behavior differs when watching a match at home, at a bar, or at the stadium.

Research indicates this is not the case. Through all the variables in access, noise, signal strength, community and more, fans' social behavior and platform choice is consistent regardless of in-home (IH) or out-of-home (OOH) environment.

For example, 22% of fans will use Twitter during a match IH, while 21% will use Twitter during a match OOH.

Footnote:

For fans of short, viral clips of goals, tackles, and bloopers, unfortunately Vine was relegated (perhaps permanently) in 2016.

Fans were asked about their social media behavior while watching a match IH and OOH, selecting up to 3 choices:

Platform	IH (%)	OOH (%)
facebook	50	46
YouTube	40	39
twitter	22	21
Instagram	20	18
snapchat	14	13
reddit	8	7
Periscope	2	3
Vine	3	3





**1.5 million subscriptions
to public soccer subreddits**

Don't Sleep on Reddit.

Hardcore American soccer fans are heavy users of the news aggregator platform Reddit as a one-stop shop for soccer news, as well as casual, opinionated, and informative discussions. For a significant number of soccer fans, Reddit is the front page of the soccer world.

A Deeper Dive.

What makes Reddit unique is the multitude of soccer-specific subreddits where users can discover news pertaining to a particular topic, league, etc. The general soccer subreddit ([/r/soccer](#)), created in 2008, has over 550,000 subscribers. There are 1.5m subscriptions to all public soccer-related subreddits.

A More Die-Hard Fan.

80% of soccer fans who use Reddit as a news source indicated that their interest in soccer is greater today than it was 12 months ago. These Reddit users are 75% male, have an average age of 28, and almost half possess at least a bachelor's degree.

The Reddit soccer community is a living, breathing and evolving forum – brands and marketers should look to Reddit to keep a finger on the pulse of hardcore, passionate, and digitally-connected soccer fans.

“Goal” or “Goooooool,” Good Content Scores.

45% of Millennial soccer fans are multi-cultural. At the heart of that audience is the influential bi-lingual, bi-cultural Hispanic demographic. Able to follow soccer in English or Spanish, they have many content destination options.

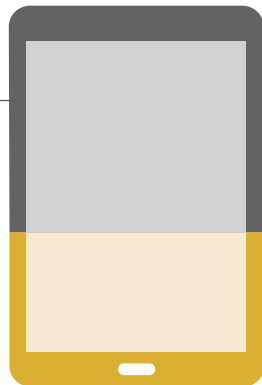
Hispanic Millennial fans choose a mix of both English- and Spanish-language content.

In the week prior to the survey, 40% of the soccer content consumed by Hispanic Millennials online was in Spanish, 60% in English.

As a global sport with global coverage, fans will choose the online content they like best, regardless of language.



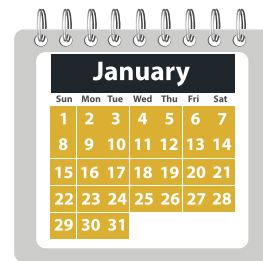
60%
of Hispanic Millennials
read content in English



40%
of Hispanic Millennials
read content in Spanish

“Generally, I get my soccer news from Facebook, but for European soccer news I’ll go to Marca, for Latin American news I’ll go to ESPN Deportes, and because I’m from Uruguay, I’ll get that news from Ovación Digital.”

-Juan Pablo Pirez, 29, Chicago



63%
of soccer fans
play soccer video
games every week



64%
increase in the
likelihood of UEFA
Champions League
fandom for gamers
over non-gamers

Gaming Controls Fandom.

Gaming is big with fans and non-fans alike.

There's no denying the powerful link between gaming and fan interest in soccer. According to EA Sports, FIFA gamers are 50% more interested in pro soccer after playing the video game⁷.

And there are plenty of people playing the game. 63% of soccer fans indicated they play soccer video games every week. Of this audience, 25% play six or more hours per week and 8% play 10 or more hours per week.

It impacts who they support.

A closer look reveals that gamers heavily favor the big European soccer leagues and global soccer icons. For example, they're much more likely to watch, follow, and become fans of clubs who frequently advance in the UEFA Champions League, like Barcelona, Bayern Munich, Paris Saint-Germain, Arsenal, etc. By playing as the best players and teams, they intrinsically become avid fans of the best players and teams.

The Playmaking Power of Influencers.

Soccer has a robust world of digital influencers. Some of the most popular and powerful among them are not former players or celebrities—they're regular, relatable people who have harnessed and captivated a digital audience through gaming and other lifestyle content.

Gamers like KSI, Spencer FC, Poet and Vuj are producing soccer content at an incredible rate, building large and loyal followings. Their influence is shaping the next generation of soccer fan—what they watch and what teams and players they root for.

In 2015, viewership (watching, not playing) of FIFA cracked the top ten list of most-watched video games on Twitch for the first time⁸. Research indicates that an impressive 45% of soccer fans have watched soccer video games or gamers on YouTube or Twitch.

45%
of soccer fans have watched
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on YouTube or Twitch



FIFA AND CHILL

Sources

¹Roku Leads OTT Streaming Devices in Household Market Share

<https://www.comscore.com/Insights/Blog/Roku-Leads-OTT-Streaming-Devices-in-Household-Market-Share>

²FuboTV Growth Accelerates to More Than 70,000 Subscribers

<http://www.multichannel.com/prfeed/fubotv-growth-accelerates-more-70000-subscribers/406145>

³Chivas to show all matches on Chivas TV via internet or mobile app

<http://www.espnfc.us/mexican-liga-mx/story/2904644/chivas-to-show-all-matches-on-chivas-tv-via-internet-or-mobile-app>

⁴One-Quarter of US Households Live Without Cable, Satellite TV Reception – New GfK Study

<http://www.gfk.com/en-us/insights/press-release/one-quarter-of-us-households-live-without-cable-satellite-tv-reception-new-gfk-study/>

⁵GESM Soccer on TV 2016

⁶News Use Across Social Media Platforms 2016

<http://www.journalism.org/2016/05/26/news-use-across-social-media-platforms-2016/>

⁷Research Shows EA's FIFA Soccer Video Game Has Huge Impact in US

<http://worldsoccertalk.com/2014/11/26/fifa-soccer-video-game-has-huge-impact-in-us-infographic/>

⁸Twitch 2015 Retrospective

<https://www.twitch.tv/year/2015>



Want to Connect With Soccer Consumers? Let's Chat.

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