



The value of live sport in Britain's pubs and bars

Exclusive insights from CGA by NIQ and Sky Business into the who, when and why of consumers watching sport—and how to capitalise on their interest

sky business





Welcome to this special report from CGA by NIQ and Sky Business

It brings together insights into engagement with live sport in Britain's licensed premises from two perspectives. Our exclusive consumer survey reveals exactly who's watching games in pubs and bars, while our business-side poll shows what pub landlords, managers and owners think about live sport in their venues. The report also looks into connectivity and the importance of good WiFi from both a consumer and licensee perspective.

Our research confirms the huge value of sports fans to venues and the benefit it can bring and suppliers—and with businesses and households alike facing major cost pressures, it's more important to meet their needs and win their spend. We hope our analysis helps you to both keep sports viewers coming back and attract new ones, and would love to hear your views.



Ten top takeaways

- 1 **Sports fans are vital to pubs and bars.** An estimated **8.5 million** British consumers have watched games while out in the last six months.
- 2 **Sport brings people together.** Social connections are the second biggest reason people watch games out of home, and **75%** of fans visit with bigger groups than they usually would when visiting pubs generally.
- 3 **A sporting reputation builds loyalty.** **89%** are more likely to revisit a venue if they know matches are screened.
- 4 **Fans spend more.** Their average monthly spend on eating and drinking out is **36%** higher than those who don't visit pubs and bars to watch sport.
- 5 **Sporting occasions lengthen visits.** **87%** say they stay longer than usual when a live game is on.
- 6 **Live games create a unique atmosphere.** **41%** of fans say the lively atmosphere is a main reason they watch in pubs and bars instead of elsewhere.
- 7 **Football dominates.** It's consumers' most popular live sport in pubs and bars with rugby union, boxing and cricket next.
- 8 **There's room for growth in women's sports.** **48%** of pubs and bars screening sport plan to show more women's games over the next few months.
- 9 **Consumers have favourite channels.** **90%** of consumers think Sky Sports is the best broadcaster of live events.
- 10 **WiFi matters.** **85%** of those who watch sport in pubs and bars expect free internet access.



Of landlords, managers and owners say people who watch live sport also visit for non-sporting occasions.



Think some guests would go elsewhere if they stopped showing live sport

Live sport in pubs and bars: Who's watching and why

Sports followers are core to Britain's pubs and bars. CGA by NIQ research for this report estimates that **8.5 million** British consumers have watched events in pubs and bars in the last six months.

For many of these consumers, these experiences are engrained in their habits. More than a quarter (**27%**) of them watch at least weekly, and nearly two thirds (**62%**) do so at least once a month. More than half (**52%**) prefer watching in pubs and bars to staying at home—an indication that the experience of following sport in a lively and convivial environment beats sitting on the sofa.

Atmosphere and connections are big parts of that experience. Two in five (**41%**) say they choose to watch in pubs and bars because the atmosphere is livelier, and nearly as many (**39%**) enjoy the

chance to connect socially with friends. Food, drink, convenience and screen quality are among a wide range of other factors that add up to the unique experience of watching sport in pubs and bars (see box). Another interesting point here is that only **15%** visit because the venue shows games they can't access at home. It's a clear sign that people are using pubs and bars for the experience, and not just out of necessity.

These people are particularly valuable to venues because they tend to spend freely. Consumers who watch sport in pubs and bars spend an average of **36%** more on eating and drinking out per month than those who don't. With competition for footfall so fierce at the moment, it's clear that attracting sports fans can be a significant trading advantage.

WHY they watch: Atmosphere and connections lead

Nearly nine in ten (**86%**) sports viewers think it's important that a venue shows live sports when choosing where they want to go. These are the top ten reasons why.

1. Livelier atmosphere
2. Social connect with friends
3. To enjoy food and drinks
4. To catch up with friends / family
5. It's more fun
6. To support my team
7. The venue is local to me
8. The screen is better
9. To support the venue
10. They show games I can't access at home

WHEN they watch: Weekends rule

The appeal of live sports peaks at weekends. Two thirds (**66%**) of consumers say they typically prefer to watch games on Saturdays ahead of the two next most popular days, Fridays (**34%**) and Sundays (**31%**). Mondays (**5%**), Tuesdays (**9%**), Wednesdays (**17%**) and Thursdays (**10%**) have much less appeal.

This is positive news for venues, because weekends are when consumers tend to spend most heavily and stay out the longest. It also reflects the popularity of relative to midweek fixtures in other competitions.

8.5 million

Consumers have watched live sport in pubs and bars in the last six months



36%



Extra monthly spend on eating and drinking out by consumers who watch live sport in pubs and bars compared to those who don't

Five ways live sport pays

CGA by NIQ and Sky Business' research shows how screening live sport brings money into the tills. But the benefits go far beyond the extra cash. Here are five of the biggest.

1. More spending

People who visit pubs and bars to watch sport are ready to spend. More than four in five (**83%**) of them say they typically spend more on food and drink on these occasions than they do on visits without a live game.

2. Longer visits

Live sport keeps people in venues for longer. Nearly nine in ten (**87%**) sports viewers say they would stay longer than usual if a venue screens live games—rising to **94%** among those who spend more than £40 per visit. And they are not just in and out for the game: they arrive an average of 43 minutes before it starts and stay for an average of 45 minutes afterwards. For football matches, this adds up to at least three hours in a venue, and often longer.

3. Larger groups

Pubs and bars have a special ability to connect people over sport, and many of those who watch games in pubs and bars like to do so with friends. Three quarters (**75%**) say they would visit with a bigger group of people when watching live sport—three others on average—and again the number is even higher among high spenders at **89%**.

4. Loyalty

If live sports viewers get a good experience in a pub or bar, they'll come back. Nine in ten (**89%**) are more likely to revisit a venue if they know matches are screened, and well over two thirds (**72%**) would go less often if it stopped showing sports.

5. New dayparts

Sport can attract people to pubs and bars at times they wouldn't normally visit. Significant numbers say they are more likely to visit at times (**32%**) or on days (**38%**) when they would otherwise be elsewhere. This suggests live sport is delivering incremental spend rather than taking it away from other dayparts.

WHAT they're watching: Consumers' top ten sports

It's no surprise to find that football is by far the most popular sport among people who watch in pubs and bars. It has twice the number of followers as the next most popular sports, rugby union, boxing and cricket. Beyond those, fans enjoy a wide variety of sports to varying degrees, including Formula 1, tennis, rugby league and darts.

1. Football
2. Rugby union
3. Boxing
4. Cricket
5. Formula 1
6. Tennis
7. Rugby league
8. Darts
9. Snooker
10. Golf



Nearly nine in ten say that football is the most popular sport watched in pubs

88%

What's screening? Venues' most popular sports

In line with consumers' preferences, football dominates live sports in pubs and bars. Among those who screen sports, nearly all show the national game—far more than those showing cricket, golf, rugby league and rugby union.

Sports like tennis and boxing might not fill pubs and bars like football, but there are very good reasons for screening them. They can be a valuable attraction on days without big football matches, and help to reinforce a venue's reputation for live sport.



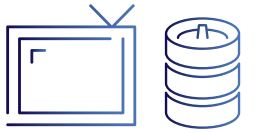
The untapped potential of women's sport

The profile of women's football and other team sports has improved dramatically in the last few years—which creates potential to bring more female fans into pubs and bars.

While some venues are satisfied with their gender splits, more than half (**56%**) of landlords, managers and owners say they would like to attract more women and families to watch live sport. They are acting on this too, with (**48%**) planning to show more women's sport over the next few months.

The FIFA Women's World Cup this summer could be a great starting point for drawing in these new fans. Its locations in Australia and New Zealand mean the timings of games won't be ideal, and some followers will prefer to watch at home. But if pubs and bars open early, promote their offer, and provide the right environments, the tournament could help to fill seats in early trading periods that would otherwise be

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56% 

of landlords, managers and owners say they would like to **attract more women and families to watch live sport.**

48% 

Plan to show more **women's sport over the next few months**

The value of live sport: Views from pubs and bars

Pub landlords, managers and owners know that screening sport is a significant investment at a time when costs are rising. But they also know that it pays substantial dividends in spending, loyalty and reputation.

More than two thirds (**68%**) of those surveyed by CGA by NIQ and Sky Business agree their revenue increases as a direct result of showing live sport. Half (**49%**) say live games increase customer satisfaction, and nearly as many (**41%**) think it raises spend per head. A similar number (**44%**) think consumers stay for longer than usual when sport is on, compared to just **3%** who say they spend less time there.

Equally as important is that people who visit for sport will come back at other times too. Nine in ten (**91%**) landlords, managers and owners say customers who watch games in their venue also visit for non-sporting occasions.

Sport's appeal is particularly critical while consumers' spending is under such pressure. Nine in ten (**92%**) respondents agree that it's more important than ever to offer a good experience given the current economic climate, while **70%** think people who visit for sport are more important for the

same reason. Cash-strapped consumers know they can save money by eating and drinking at home, but sport gives them an attractive reason to go out instead.

These benefits are pushing live sport towards the top of pubs and bars' areas for investment, and nearly three quarters (**73%**) of those who screen Sky Sports say live sport is a high priority over the next year. They also know that consumers who don't get the access to games they want will vote with their feet: four in five (**82%**) think some guests would go elsewhere if they stopped screening live sport.

68% 

Of landlords, managers and owners say **revenue increases as a direct result of showing live sport.**

49% 

say live games **increase customer satisfaction**





Live sport and Sky Sports

Pubs, bars and other venues have a huge variety of sports and channels to screen, and this research reveals their preferences.

Nine in ten (**90%**) viewers think Sky Sports is the best broadcaster of live sport, and a similar number (**92%**) say it has the best range of events. Both numbers are even higher among fans who go out more often and spend more.

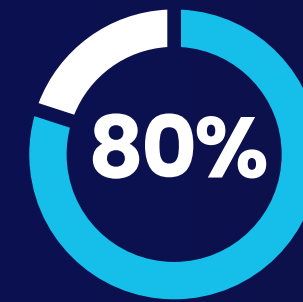
One of Sky's biggest points of appeal among consumers is its long association with the English Premier League. Nine in ten (**91%**) of those who watch sport in pubs and bars agree that Sky is the home of the Premier League—which is the most popular football competition by some distance (see box).

Nearly three quarters (**71%**) of landlords, managers and owners agree Sky is the home of the English Premier League, and even more (**73%**) think it has the best range of sports. The quantity of matches is important too. *"It shows the sports my customers require,"* said one survey respondent. *"They have better presentation, better camera work and better pundits,"* another added.

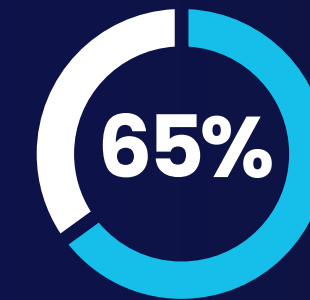
In the competition for footfall and sales, providing the right channels can be a decisive advantage. Four in five (**81%**) say they are more likely to visit a pub or bar if it offers Sky Sports, with just **2%** less likely to go.

Here's what football fans want to watch

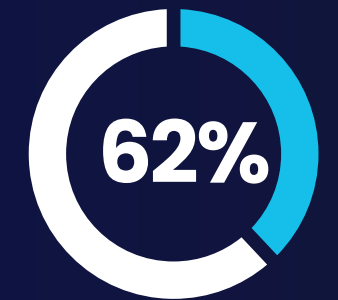
This survey of sports fans shows **80%** watch the Premier League while out, putting it well clear of their next two choices, the Champions League and FA Cup.



1. Premier League



2. Champions League



3. FA Cup

Sky Sports live events: Highlights

- 128 live Premier League games a season until 2025
- EFL rights until 2029
- The home of Formula 1 until 2029
- ICC Cricket World Cups until 2031 and home England games until 2028
- The Masters, DP World Tour and Solheim Cup golf tournaments until 2024, plus the Ryder Cup and PGA Tour until 2025
- PDC Darts events until 2025
- More than 100 NFL American Football games a season until 2025

90% sky sports

Of people who watch sports in pubs and bars think Sky Sports is the best broadcaster of live sport

91% Premier League

Agree that Sky is the home of the English Premier League

81% sky sports

Say they are more likely to visit a pub or bar if it offers Sky Sports

73% sky sports

of landlords think that Sky has the best range of sports

Staying connected: The importance of good WiFi

Alongside the quality and range of matches that are available, consumers who watch sports are highly motivated by the connectivity of the pubs and bars they visit. Of course, fast and reliable broadband connections are essential for venues too.

For many people, high quality WiFi is now a non-negotiable part of the experience. From connecting to others to social media to online betting, WiFi facilitates the device-based activities that are core to consumers' lives (see box).

As a result, well over four in five (85%) expect free internet access in a pub or bar, and nearly two thirds (62%) will always or often connect to it. Fast and reliable broadband enhances a venue's reputation, making four in five (79%) people more likely to revisit it. But patchy or slow WiFi can be a real turn-off, and 64% say a poor connection makes them less likely to come back.

More than four in five (82%) pub landlords, managers and owners offer free WiFi, and a similar number (85%) agree that it's important to their business to offer it—so venues that fail to do so are at risk of disappointing their guests. "People demand WiFi now—they simply can't go without it," said one survey respondent. "If we don't provide it they might go somewhere else," said another.

Beyond guest access and streaming, broadband is an enabler of contactless payment—essential given the sharp drop in cash payments since the start of the COVID-19 pandemic—and online access to menus in pubs and bars. Efficient WiFi has fringe benefits too, including the chance to gather valuable data about guests.

Trust is a crucial issue for consumers and operators alike. Nine in ten (92%) sports viewers say it's important to them that connections are private and secure, and two thirds (67%) are more likely to trust it if the WiFi is provided by Sky Business. For landlords, managers and owners, reliability and stability rank ahead of speed and cost on the list of most important factors.

Devices in pubs and bars: Consumers' top uses

Pubs and bars give people the social occasions they crave—and good WiFi delivers the same close contact in their online lives.

Half (51%) of those who watch sport in venues say they typically message friends and family when out, while 45% look at Facebook, Instagram and other social media platforms and 41% check emails.

As well as watching games, fans use their smartphones to interact with sports in other ways. Just over a third (36%) say they typically check scores, while a quarter (25%) use their devices for online betting.

All these uses emphasise the connected and multi-media world in which consumers now live—and the importance of WiFi in enabling it.

85%



Of consumers who watch sport in pubs and bars expect free internet access

79%



Are more likely to revisit a venue if it has fast and reliable broadband

85%



of landlords, managers and owners agree that it is important to their business to offer WiFi



About Sky Business

Sky is one of Europe's leading media and entertainment companies and is part of Comcast Corporation, a global media and technology company that connects people to moments and experiences that matter. At Sky we Believe in Better.

Sky Business is the business-to-business division of Sky.

No matter the size or sector, Sky Business keeps businesses connected and customers entertained with their next generation network and unrivalled live sport and entertainment.

Everything at Sky Business is guided by three promises:

- **Always innovate.**
- **Making customers' every day easier, with next-level support.**
- **Continually invest in business, with business grade commitments.**

To find out how Sky Business can keep your business connected and your customers entertained, please contact:

T: **08442 414 664**

Visit: **www.skyforbusiness.sky.com**



About CGA by NIQ

CGA by NIQ provides definitive On Premise consumer intelligence that reveals new pathways to growth for the world's most successful food and drink brands. With more than 30 years of best-in-class research, data, and analytics, CGA by NIQ provides the Full View(TM).

CGA by NIQ works with food and beverage suppliers, consumer brand owners, wholesalers, government entities, pubs, bars, and restaurants to protect and shape the future of the On Premise experience. Using the most complete and clear understanding of measurement and insights, CGA by NIQ provides a competitive edge to guide winning strategies for On Premise businesses.

NIQ was founded in 1923 and is an Advent International portfolio company. For more information, visit **NIQ.com** or **www.cgastrategy.com**.

About the research

This report is based on two exclusive surveys conducted by CGA by NIQ with Sky Business. They gathered responses from 500 nationally representative consumers who watch sports in Britain's On Premise; and 112 pub and bar landlords, managers and owners. The surveys were conducted in May and June 2023.

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