TNS, ESPN Debut Sports Poll Europe Survey

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New Multi-Sport Tracking Study for Europe releases Baseline Results: 87% of Europeans are Sports Fans -- nearly 1 in 4 are Avid Fans

TNS today released topline findings from the baseline wave of the new ESPN Sports Poll Europe.

This comprehensive tracking study will measure Europeans' interest and engagement with sports.

Based on the US study that has been the preeminent source of American sports intelligence since 1994, the European version will provide sponsors, leagues, and the media with valuable insights about the impact that sports has on consumers and the role it plays in their lives.

Initial results are based on 500 online interviews conducted in January in each of the following countries: France, Germany, Italy, Spain and the UK. Monthly surveys will continue throughout the year, with detailed findings and trends reported on a quarterly basis.

Robert Fox is Senior Vice President of Sport & Sponsorship research at TNS North America.

He states,
"Companies have tools to measure specific aspects of their sports business, like television ratings and media exposure programs. These are important, but they do not tell the whole story.Â By tracking more than two dozen sports, this study offers brands a 10,000-meter vantage point to assess their target markets across the entire sports landscape. Continuous tracking makes this particularly unique because it negates the seasonal bias associated with comparing sports at a given point in time."

Artie Bulgrin, Senior Vice President at ESPN said,
"The Sports Poll is unique in that it provides in-depth intelligence about the impact that sports has on the population with respect to involvement, media usage, and consumer behavior. The monthly Sports Poll tracking in the US helps us identify trends that ultimately affect media and advertising performance. We are enthusiastic about what we can all learn in Europe now."

The study is designed to help answer questions such as:
* Which sports offer the best opportunities to reach a specific target market?

* What is the true consumer profile of a sports fan? How intense is their fandom? To what extent does an emerging sport have potential to grow? Should my company be an early adopter?

* How does our property stack up against other sports? Who is paying most attention? Is my company in the right countries? What opportunities are we missing?

Some of the findings from the baseline wave that surprised the researchers were:

1. Overall, sports interests were higher in Spain and Italy compared to France, Germany, and the UK. While cultural differences can account for how people respond to scaled questions in surveys, both behavioral and attitudinal questions showed greater avidity and activity in Spain and Italy.

2. The Olympics are thought of differently in Europe compared to the United States. Americans tend not to think of the Olympics as a "spectator sport."Â When asked, "What is your favorite spectator sport?" the majority of Americans mention the largest professional and college sports like the National Football League, (NCAA) College Football, and Major League Baseball.

3. As expected, Football (soccer) and Formula One were the top two mentions as favorite spectator sport. Number three was the Olympics followed by Men's Tennis.

As with a beauty or talent contest, you can like more than one contestant, but only one can be selected as the favorite. An implication is that if two sports are on the television simultaneously, the viewer is most likely to select the favorite for real-time viewing. See table below:

To measure activity levels in individual sports, the US version of the study has demonstrated that a person's self-described interest level in a given sport highly correlates with their actual behavior, including television viewing, event attendance and purchasing of licensed products.

The question was asked,
"How interested would you say you are right now in X sport?"Â The choices were "Very Interested, Somewhat Interested, A Little Bit Interested, and Not at All Interested." Â

Sports were asked in a random order to avoid biasing the results.

The following chart reflects the percentage of people in each country who were "Very Interested" in each sport, which the Sports Poll defines as "Avid Fans." Â

Selected sports from the survey are displayed.

To place these results in perspective of what is already known, some of the European data were compared to the US version of the ESPN Sports Poll. While data collection methods are different, the questions are the same.

The consistency in overall sports interest and specifically for the top sports in each region provides confidence in the EU findings. For example, comparing December data from the US to the total EU sample from the January baseline:

In a separate question, the study asked about interest levels in this year's two major global events.Â As with all questions, the value to subscribers will be in their ability to filter results for their specific target markets and track the changes throughout the year. Â

Taking a weighted average to proportionally represent the populations of the online population in all five countries in the study, January results of total and avid interest for the Winter Olympics and World Cup are shown below, While overall interest in both events are comparable, the intensity of interest is greater for World Cup as indicated by the larger avid fan level.

Companies interested in building fans in US sports leagues have opportunities and challenges.Â The data collection methods in the European and US studies are different, but we can draw a high-level comparison. Â

With the exception of the NFL and MLB which have much larger fan bases in the US, the total fan bases for the other leagues are similar to what is seen in the US. Â

The results below are a weighted average to reflect the online population of the five countries.

Interest in US Sports League

The study also measured media habits of the respondents.Â Among people with online access, usage of the digital space for sport information is high, but varies somewhat by country. Â

The survey asked,
"Do you ever use the Internet to access sports information?"

Diving deeper into online activity, the study showed that 10% of the respondents in Italy spend three or more hours a day on social networking sites such as.

Facebook, compared with only 2% in Germany, However Germans are the most physically active, which may account for less screen-time.

About TNS
Please visit www.tns-us.com for more information.

About The ESPN Sports Poll
Since 1994, dozens of Fortune 500 companies have used the ESPN Sports Poll to make informed decisions in the areas

of sports, events and sponsorships on a national, regional and local level.

Additionally, the major leagues utilize the ESPN Sports Poll to promote their leagues and grow their fan-bases.

The Kantar Group
For further information, please visit www.kantargrouptns.com .

About ESPN
ESPN, Inc. is the world's leading multinational, multimedia sports entertainment company featuring a portfolio of over 50 multimedia sports assets.

The company is comprised of six US television networks (ESPN, ESPN2, ESPN Classic, ESPNEWS, ESPN Deportes, ESPNU), multiple HD simulcasts worldwide, ESPN Mobile, ESPN Radio, ESPN.com, live and on-demand broadband services in multiple countries around the world, ESPN The Magazine, ESPN Enterprises, ESPN PPV, ESPN Zones (sports-themed restaurants), ESPN on Demand and ESPN International.

ESPN International has grown to include ownership -- in whole or in part -- of 46 television networks outside of the United States, as well as a variety of brand extension businesses, which allow ESPN to reach fans in over 200 countries and territories. ESPN International business entities include television, radio, print, Internet, broadband, wireless, consumer products, and event management.

Based in Bristol, Conn., ESPN is 80 percent owned by ABC, Inc., which is an indirect subsidiary of The Walt Disney Company. The Hearst Corporation holds a 20 percent interest in ESPN.

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