

SPORT SPECTATOR PREFERENCES - WHAT IS THEIR FAVOURITE TV-SPORT PROGRAMME?

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INTRODUCTION

Sport spectators have the choice between different kinds of sport broadcasts e.g. live versus recorded, full length versus highlights, or free-to-air-TV versus pay-TV. All these choices represent different business and revenues models for sport event organisers having an economic impact on these organisations. They have to find the most successful kind of sport broadcast for their sport event. That is why they require knowledge about spectator preferences. Hence, the research question of this paper is: What are the spectator preferences for different kinds of sport broadcasts on television?

Most of the literature about selling a sport event is dealing with gate attendance (e.g. Bird 1982; Czarnitzki/Stadtmann 2002; Dobson/Goddard 1996; Peel/Thomas 1996). Only a few pieces of literature focus on the demand for sport broadcasts on television (e.g. Baimbridge et al. 1995, 1996; Gantz 1981, 1995; Solberg/Hammervold 2004).

The demand for sport broadcasts on television is usually discussed as a derivate of gate attendance. Three arguments indicate that this is not the whole story: First, gate attendance is a live experience together with other fans. Television broadcasts are often recorded and shown later. TV spectators do not necessarily watch in groups. The competitors of sport broadcasts are stronger as watching sport on television is not as unique as joining the crowd. Second, stadium spectators watch the event in full length. Sport events on television can be summaries only. Third, going to the stadium needs extra travelling time and causes expenditures for e.g. entrance fees or travelling. At least free-to-air-TV is free of charge. These comparisons show that knowledge in the field of gate attendance has a limited impact on the marketing of sport television programmes. Additional sport marketing knowledge for sport television programmes is necessary.

METHODS

The need for additional sport marketing knowledge makes empirical field studies necessary to identify sport spectator preferences. Here, a motivation analysis and a conjoint analysis of the preferences are used simultaneously. The motivation analysis (e.g. Trail/James 2001; Wann et al. 2001) is based on an evaluation procedure of motivation statements. The conjoint analysis (e.g. Green et al. 2001; Ofek/Srinivasan 2002) is used to analyse sport spectator preferences for certain types of sport television programmes. The conjoint analysis identifies spectator preferences for different attributes and attribute levels of sport programmes. The conjoint analysis allows implications such as the following: If all football matches are available live instead of highlights only, then spectator A is willing to pay X € more. Furthermore, the conjoint analysis enables preference-based market segmentations employing a cluster analysis.

RESULTS

The study was made on the German television market (n = 227). Six motivation factors are identified: affiliation/involvement, sport fascination, identification with athletes and teams, economic, escape from everyday life, aesthetics. Three preference-based market segments were recognized. People in the first segment watch sport programmes regularly. They are satisfied by summaries and look for condensed information on sport events. They could pay for pay-TV subscriptions but they are not interested. People in the second segment

are enthusiastic about sport and watch sport very frequently. They need to get any information about sport events. Full length live broadcasts are their first choice. However, the price sensitivity in this market segment is rather high. They are interested in pay-TV programmes, but they cannot afford them. The motivation factor 'affiliation/involvement' discriminates between the first two segments significantly. People in the third segment are not very much interested in sport programmes at all. They rarely watch sport on television. Accordingly, their price sensitivity for sport programmes is high. They are neither interested in the broadcast nor willing to pay.

DISCUSSION

The study demonstrates an approach to identify preference-based market segments for sport broadcasts. These preference-based segments are well described by their specific motivations. These results enable marketers to identify and address target customers precisely. They can create customised sport broadcasts for the different target groups.

Furthermore, the study reports characteristics of the German television market. Pay-TV is requested only occasionally. A majority of the sample subjects is interested in condensed information. Highlight programmes, preferably on public channels, provide the highest utility for them. Live broadcasts are particularly important for people of the second market segment. They are sport enthusiasts. But, sport marketers in Germany have to find a way to increase this group's willingness to pay for the broadcasts. At the moment, their disutility from paying for the programme is even higher than the utility from getting extensive live coverage.

Studies such as this have to be conducted for each national market separately. Particularly the motivation analysis discovers differences between the subjects in the sample and other above referenced motivation studies in the literature.

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