

Sport bounces back on TV

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The Covid-19 pandemic has had a profound effect on the global sports industry, not least on broadcasters that were suddenly without any live sports coverage to air during what is ordinarily one of their most audience-rich and commercially active periods.

In the UK, we have looked at how the lack of live coverage affected viewing on pay-TV broadcaster Sky Sports and the reaction from consumers since live sport has returned to television.

Within our analysis, we refer to “viewer hours” which is a consumption metric now used by the likes of FIFA, the IOC and World Athletics to gauge the amount of event coverage that has been seen by viewers. The metric allows for direct comparison of the broadcast performance of properties across different broadcast platforms and regions/territories. April and May hiatus

During the UK’s lockdown period¹ TV audiences of many channels rose significantly – total UK TV viewing increased by 14 per cent over the same period in 2019 – as consumers found themselves largely housebound and with more time at their disposal.

However, the thematic sports channels suffered a dramatic drop off in audience due to the lack of live content available. Sky Sports experienced its worst ever period². Despite the broadcaster’s efforts to keep its viewership engaged there were just 27 million hours of content viewed across Sky Sports television channels³ in April and 31.7 million hours in May – just a fifth of the 2019 monthly average.

Twenty-two of the broadcaster’s 50 lowest-ever viewing days (days in which the fewest number of hours of content were watched) were experienced during the UK lockdown period.

Reach was also affected. The average number of unique individuals to watch at least fifteen consecutive minutes of Sky Sports coverage each month in 2019 was 10.8 million. In April 2020 less than half this number was reached, just 4.3 million, whilst in May 2020 the figure was 4.5 million.

With precious little in the way of live sports content to offer and in an effort to avoid permanently losing customers, Sky made the call to temporarily allow its subscribers to pause payments for its sports channels. However, customers were still able to view the content that aired across its sports channels during this time.

The return of live televised sport

Major live sports coverage returned to Sky Sports with golf’s PGA Tour on June 11, followed by Premier League football on June 17. Formula 1 returned to racing with a condensed and as yet un-finalised calendar, starting with the Austrian GP on July 5. Live international cricket returned in July with a three-Test series between England and the West Indies. Depending on their package, Sky Sports customers were once again charged for their subscription from June 20 onwards, to coincide with the recommencement of live broadcasting.

Of these, it was of course the resumption of the Premier League that was given the loudest fanfare. In an unprecedented, revised, agreement between the Premier League and its broadcasters, all 92 remaining matches aired live across current rights holders Sky Sports (on pay and FTA platforms), BT Sport, Amazon and the BBC (which showed four matches free-to-air, the first time that the corporation had aired live Premier League coverage). At the time Sky chief executive and EVP, UK and Europe, Stephen van Rooyen said: “The return of live sport is a big moment for the country, and we want the nation to join us.” They did...

Much has been made of the viewing performance of individual matches. With the help of free-to-air coverage the Premier League achieved some of its highest ever home market audiences. The Merseyside derby between Everton and Liverpool had an average whistle-to-whistle audience of 4.8 million viewers across all channels, an all-time Premier League record.

However, it is the overall impact of almost daily live Premier League action, combined with the gradual return of other sports that has had a huge effect on Sky Sports’ total viewing figures.

Sky Sports’ most-viewed month ever

This July was the most successful month in the network’s history². The total hours consumed and number of viewers reached across the network’s stable of sports channels easily eclipses anything seen before.

Across Sky Sports channels³ 267.3 million hours of content were viewed during July. This represents a 76-per-cent increase over the average month in 2019 (152.2 million hours) and a 30-per-cent increase over the previous high (204.9 million hours in August 2019). 12.7 million unique viewers saw at least fifteen consecutive minutes of coverage, representing 21 per cent of the UK’s potential TV audience. This was 18-per-cent higher than the monthly Sky Sports average in 2019 (10.8 million viewers).

The average viewer watched 933 minutes of coverage in July, up 60 per cent compared to an average of 581 minutes per month in 2019 (and a low of 149 minutes during the lockdown month of April 2020). In July, the average viewer watched on more than fifteen separate occasions, compared with an average of eleven times per month in 2019 (and just six times in April).

Predictably, it was football that led the way in terms of consumption. Despite accounting for only 24 per cent of the hours broadcast, 56 per cent of total hours viewed on the Sky Sports channels was for football coverage (with the majority being live Premier League viewing). This was followed by: cricket with 24 per cent of consumption (12 per cent of broadcast hours), motorsport (including F1) with eight per cent (11 per cent of broadcast hours) and golf with four per cent (11 per cent of broadcast hours).

Despite the overall record high viewership levels, only one day in July broke into the all-time top ten for Sky Sports – Sunday, July 12 – a day which featured live Test cricket, live Formula 1 and four live Premier League football matches. Indeed, only four post-lockdown days crack the all-time top 100. Therefore, compared to typical viewing patterns the major change has been massively increased in terms of mid-week viewing. Excluding weekends and bank holidays, the post-lockdown period has seen the five best performing days ever in Sky Sports history.

These strong mid-week figures have meant that the post-lockdown period has seen unprecedented and consistently high audiences for Sky Sports day-on-day. The average daily consumption figure over the 45 days since the resumption of the Premier League has been 8.2 million hours – 22-per-cent higher than the pre-lockdown record high (6.7 million, for the 45 days ending September 15, 2019). Of course, the lack of UEFA Champions League and Europa League mid-week matches have enabled the Premier League and broadcasters a free reign in scheduling/airing its matches during prime-time viewing hours with no top-level competition.

Reward for collaboration and creative thinking

Sky's decision to pause its customers' subscription payments during the interruption of live sports, the judgement to postpone rather than end the Premier League season, as well as the Premier League's and broadcasters' collaborative approach to the season's resumption, can now be seen as a viewership and public relations triumph. While other properties and broadcasters both cancelled their schedules wholesale and discussed unfulfilled rights agreements, record audiences duly rewarded the patience and clear thinking of the stakeholders involved with the resumption of the Premier League, F1 and Test cricket.

Many other properties and federations are about to resume their seasons, some by condensing almost a whole year of activity into a few short months (UCl) and others altering their traditional tournament structure or introducing new tournaments (Uefa and World Rugby), it will be fascinating to see if the interest of a live sports starved public will be maintained. BT Sport (Uefa Champions League and Premiership Rugby) and Eurosport (cycling and tennis), are yet to recommence fully, will also be hoping that they can repeat the successes seen by Sky Sports.

1 – UK lockdown period defined here as March 13 to June 16, 2020 inclusive, the day the Premier League announced the suspension of play to the resumption of Premier League fixtures.

2 – Data has been analysed from January 2, 2002 to July 30, 2020, the entire data range available for analysis in the current BARB TV Audience Measurement system.

3 – For this report the Sky Sports channels analysed were Main Event, Premier League, Football, Cricket, F1, Racing, Golf, Action, Arena and Mix. Sky Sports News was not included.