CSM RESEARCH REPORT

FUTURE STUDY BUNDESLIGA CONSUMPTION

WHU Otto Beisheim School of Management

INTRODUCTION

DEAR READERS,

Today almost every fifth household in Germany uses Netflix, Amazon Prime and/or other paid video-on-demand services (Goldmedia, 2018) and almost three-quarters of all Internet users use their smartphones for social media (Faktenkontor, 2018). And, use is on the rise. Video-on-demand and social media via mobile devices are therefore already an integral part of our media usage behavior.

Changes in media usage behavior can also be felt in football. Numerous young companies, such as Dugout, Otro, and Copa90, are striving to establish themselves as content platforms for football fans. Innovative streaming providers like DAZN have entered the market. "Sky Go" has enabled the consumption of Bundesliga football on mobile devices for several years now. But established players like the DFL and the Bundesliga clubs are also adapting to the digital challenges. For several years, the DFL has been developing into an international media company and its subsidiaries now cover the entire value chain from production to international marketing (Greyser, Schmidt and Holzmayer 2018). The Bundesliga clubs are arming themselves by hiring social media managers and digital specialists and founding their own media houses.

For the representatives of Generation Z (GenZ), the birth cohort after 1996 (Pew Research Center, 2018), these developments in the digital media are completely normal; after all, they are "digital natives" with smartphones and social media in-hand nearly since birth. Since GenZ will overtake all generations in terms of size in the near future (Boroujerdi et al. 2015; Cardador and Huff 2018), its media usage behavior will determine the future marketing of football.

Although several studies confirm GenZ´s radically different media use behaviour (cf. Critical, 2016; Ingold, 2016; Schmidt, Krause, and Päffgen 2018), it is still largely unclear what effects it will have on the Bundesliga: Through which channels does GenZ consume the Bundesliga? Does GenZ follow the Bundesliga as intensively as ever? Which Bundesliga offers does GenZ want apart from the core product? Are GenZ, who grew up with content from App Store and iTunes, prepared to pay for these products?

Since GenZ will influence the development of the Bundesliga due to its increasing importance, we would like to address precisely these questions in this future study on Bundesliga consumption. We surveyed a total of 6,150 participants from all age groups and found some surprises and some unexpected similarities between GenZ and former generations.

This study could not have been carried out without the support of the DFL Deutsche Fußball Liga. We would like to express our thanks to all participants for their good cooperation.

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CONTENT

THE MOST IMPORTANT STUDY RESULTS

1 *The Bundesliga continues to have an extremely strong position among German football fans, GenZ has the highest Bundesliga consumption per matchday, despite being open to other international premium competitions*

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2 *Linear television remains the most important media genre for Bundesliga consumption; though, GenZ, in particular, frequently uses a second screen in parallel*

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3 *GenZ is more attracted to individualized products and, more than all other generations, willing to pay for football; in particular, for supplementary offers to the linear core product*

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4 *GenZ prefers shorter and more entertaining formats; they are less attentive while watching football than other generations*

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AMONG GERMAN FOOTBALL FANS, THE BUNDESLIGA STILL HAS AN EXTREMELY STRONG POSITION. OF ALL GENERATIONS, GENZ HAS THE HIGHEST CONSUMPTION PER MATCHDAY, BUT THEY ARE ALSO OPEN TO OTHER INTERNATIONAL PREMIUM COMPETITIONS

GLOBALISATION AND TECHNICAL PROGRESS HAVE LONG ENSURED THAT THE BUNDESLIGA COMPETES NOT ONLY WITH LOCAL EVENTS TAKING PLACE AT THE SAME TIME, BUT ALSO WITH ALTERNATIVE OFFERS OF OTHER LEAGUES (AND SPORTS) FOR ATTENTION. OUTSIDE OF TOP SPORTS, ON-DEMAND STREAMING PROVIDERS SUCH AS AMAZON PRIME AND NETFLIX ARE ALSO CONSTANTLY ADVERTISING FOR NEW CUSTOMERS.

Top sport also faces the effects of increasing entertainment offers competing for the time of consumers. While the average age of the spectators for most sports events continues to rise (PwC, 2017), GenZ more frequently uses streaming offers and reportedly consumes less live sports than previous generations (Criteo, 2017; Schmidt et al., 2018; Vision Critical, 2016). Our survey, however, contradicts previously held ideas of GenZ in relation to Bundesliga consumption. Compared to GenY, GenX, and baby boomers (see Fig. 1.1), GenZ reports the highest Bundesliga consumption per matchday (see Fig. 1.2).

In terms of preference, the Bundesliga performs surprisingly well when compared to Netflix & Co. Representatives of the GenZ prefer (M = +1.51; SD = 1.57, scale: Maximum possible preference for Bundesliga: +3, maximum possible preference for streaming: -3)[1] Bundesliga matches to Netflix even more frequently than GenY (M = +1.17; SD = 1.68) and GenZ's preferences are not significantly different to those of GenX (M = +1.45; SD = 1.79) (see Fig. 1.3).

Overall, our results suggest that the Bundesliga currently is strongly preferred by the fans or consumers. For example, three out of four respondents prefer Bundesliga games over matches played by the German national football team (M = +1.56; SD = 1.77). Also, in comparison to offers of other European Football Leagues like the English Premier League (M = +1.44; SD = 1.77), the Italian Serie A (M = +2.29; SD = 1.30), the Spanish Primera Division (La Liga) (M = +1.95; SD = 1.50) or the French Ligue 1 (M = +2.49; SD = 1.16), the Bundesliga was preferred.

FIG. 1.2
***BUNDESLIGA CONSUMPTION PER MATCHDAY** IN HOURS*

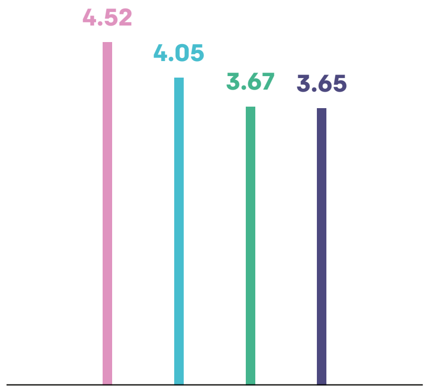
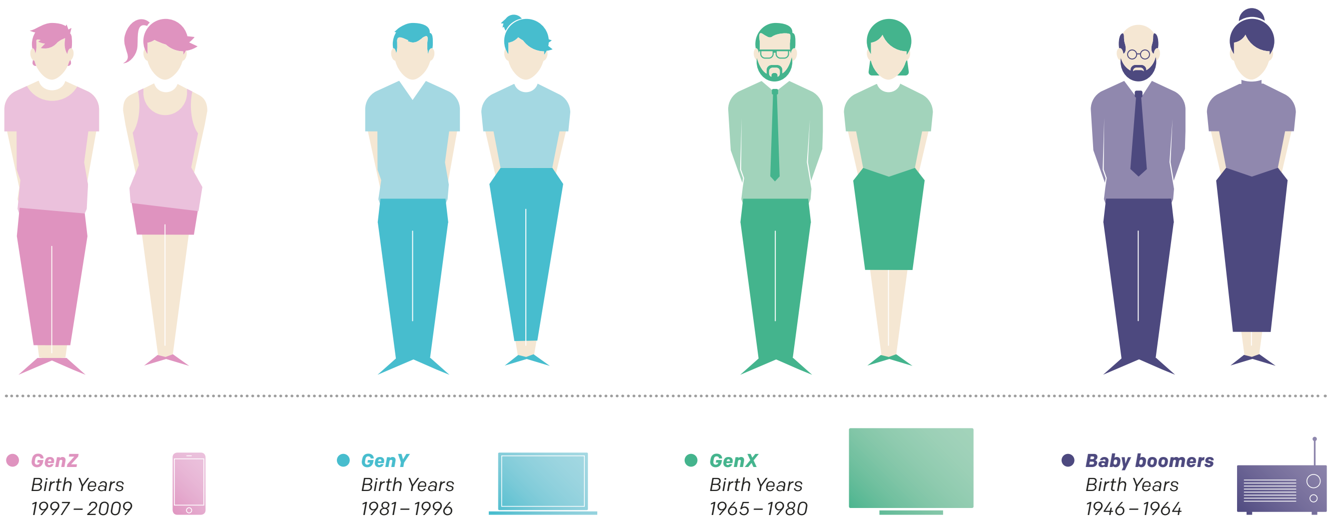


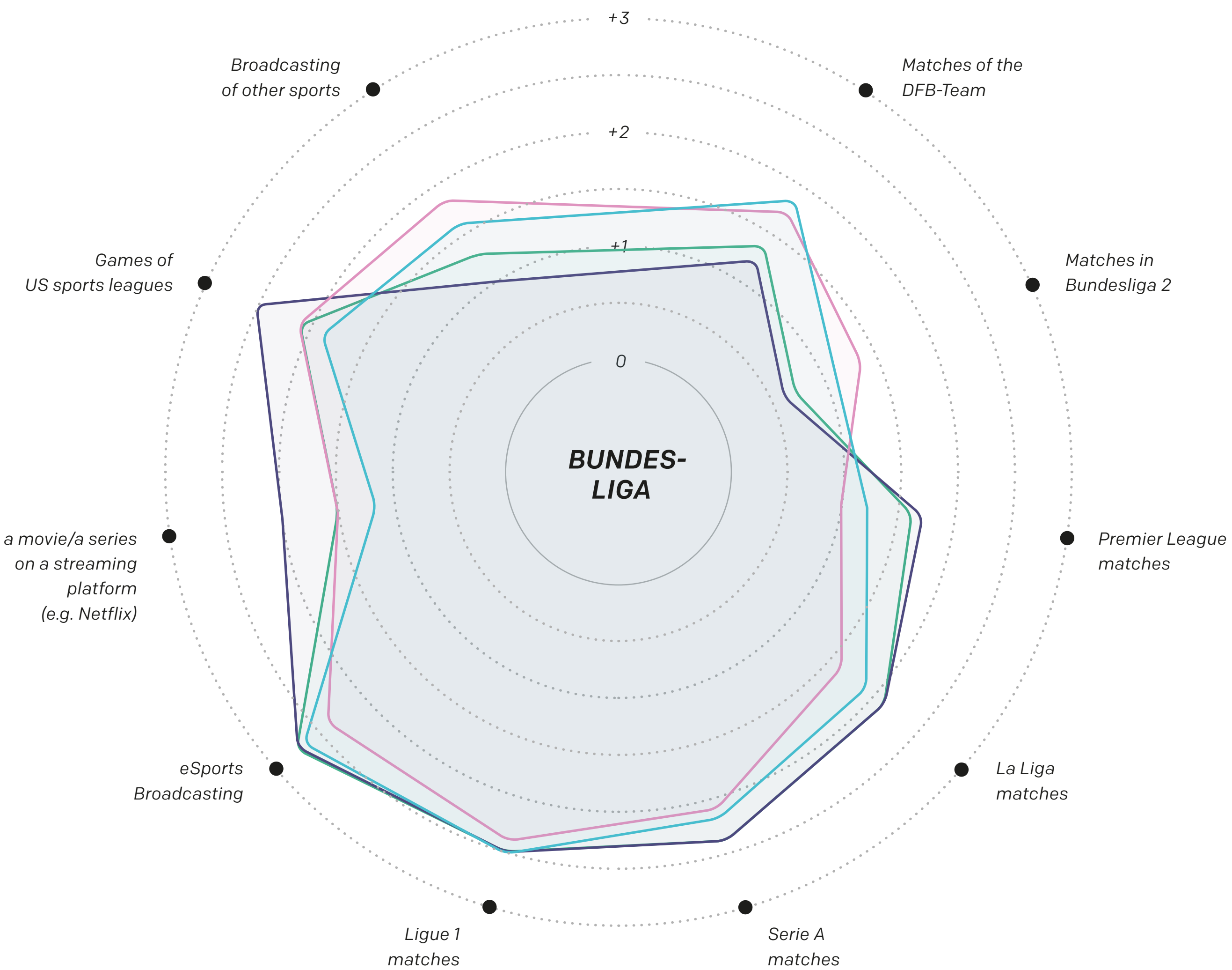
FIG. 1.1
GENERATIONS AT A GLANCE



Although the Bundesliga is currently the most popular football league in Germany for all generations considered, there are still interesting differences among the generations. For example, respondents from GenZ generally appear to be more open to offers of international competition than respondents from previous generations. For games in the English Premier League, in our survey the most popular European top league after the Bundesliga, the popularity gap is smaller for GenZ respondents (M = +1.00; SD = 1.78) than for GenX respondents (M = +1.59; SD = 1.77) and baby boomers (M = +1.68; SD = 1.81). A similar relationship can be seen, albeit to a lesser extent, in comparisons between Bundesliga and Serie A and between Bundesliga and La Liga, but not between Bundesliga and French Ligue 1 (see Fig. 1.3). However, this finding does not give cause for concern for the Bundesliga – the media consumption of the Bundesliga in the GenZ is even more extensive than in any other age groups (see Fig. 1.2).

[1] Transformed mean value and standard deviation of the agreement to the statement: "As a rule, I'd rather watch a Bundesliga game than a film or a series on a streaming portal (e.g. Amazon Prime Video, Net-flix)"; values between 1 (minimum value: no vote at all) and 7 (maximum value: no vote at all) possible

FIG. 1.3
PREFERENCE FOR CONSUMPTION: AS A RULE, I PREFER TO LOOK AT THE BUNDESLIGA GAMES, THEN...



Reading aid: The distance between the centre of the circle (Bundesliga) and the edge of the circle (alternative offer) indicates whether and to what extent the interviewees prefer a Bundesliga game to the consumption of an alternative offer. The closer a value is to the edge of the circle, the stronger the respondents' preference for a Bundesliga game.

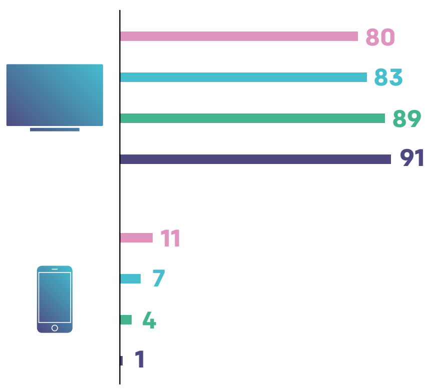
LINEAR TELEVISION REMAINS THE MOST IMPORTANT MEDIA GENRE FOR BUNDESLIGA CONSUMPTION; THOUGH GENZ, IN PARTICULAR, FREQUENTLY USES A SECOND SCREEN IN PARALLEL

PREVIOUS STUDIES SHOW THAT THE RELEVANCE OF LINEAR TV SERVICES IN THE EVERYDAY LIFE OF THE YOUNGER GENERATIONS IS GRADUALLY DIMINISHING (AGF, 2019).

This also applies to the consumption of sports content (PwC, 2017). Today, consumers are accustomed to selecting their entertainment programme individually and integrating it into their lives with the help of on-demand services such as Spotify, YouTube and Netflix. According to previous findings, this applies most to GenZ, who watch significantly less sport on linear television than previous generations (Vision Critical, 2016).

Other studies have identified another trend: People under the age of 30 use different media more often and longer, in parallel than other age groups (Carrier, Cheever, Rosen, Benitez, & Chang, 2009). The problem is that in particular "media content used in parallel [...] is rarely related to a programme" (Johnen & Stark, 2015).

FIG. 2.1
***PERCENTAGE OF PARTICIPANTS WHO SAY THEY WATCH A GAME MAINLY ON A TV/SMARTPHONE** IN %*



LINEAR TELEVISION AND EQUIPMENT

In our study results, we were unable to confirm the identified correlations for the Bundesliga. For the study participants, football continues to be a predominantly live product and consumption of the Bundesliga in linear TV dominates. So, they watch, over all generations, at one Bundesliga matchday approx. 1.44 hours (SD = 1.25) of Bundesliga football in free TV or about 2.29 hours (SD = 2.36) on pay-TV. With 4.52 hours (SD = 3.12), the representatives of GenZ have the highest Bundesliga consumption of all groups.

The most frequently used TV format is the ARD Sportschau (M = 4.31; SD = 2.02)[2], also most popular for GenZ; this is unsuprising given its free reception. Directly behind Sportschau are two live formats with Sky single games (M = 4.28; SD = 2.44) and Sky conference (M = 3.77; SD = 2.28). Interestingly, there are no significant differences among the generations. Thus, Bundesliga football watched on linear TV is also the most common for GenZ.

With regard to the choice of equipment, classic television still has the greatest importance for all generations. Roughly 86 percent of all respondents stated that they watch Bundesliga matches primarily on the TV set (M = 6.04; SD = 1.47)[3]. Although the agreement rating from GenZ (M = 5.63; SD = 1.61) is significantly lower than from GenX and among baby boomers, the use of the TV set also dominates here. Computers (M = 2.78; SD = 1.91) and Smartphones (M = 2.37; SD = 1.51) follow only with big disctance. However, their use by GenZ is considerably stronger than in the previous generations (see Fig. 2.1).

FIG. 2.2
TOP 3 MEDIA USED FOR BUNDESLIGA CONSUMPTION

1	Apps	6.1
2	TV	5.5
3	Websites	4.4

1	Apps	5.7
2	TV	5.5
3	Websites	5.1

1	TV	5.7
2	Apps	5.0
3	Websites	4.9

1	TV	5.8
2	Newspaper	5.1
3	Websites	4.4

Frequency question (information corresponds to the mean value); values between 1 (minimum value: Never) and 7 (maximum value: Very frequent (daily)) possible

FIG. 2.3
TOP 5 OF THE GENZ PLATFORMS USED FOR BUNDESLIGA CONSUMPTION

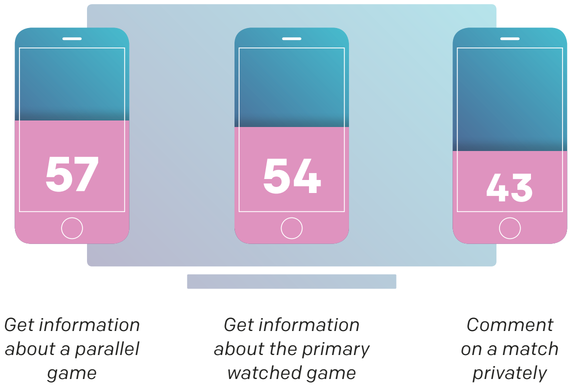
1	Youtube	4.8
2	Instagram	4.0
3	App favourite club	3.5
4	Website favourite club	3.4
5	Facebook	2.7

Frequency question (information corresponds to the mean value); values between 1 (minimum value: Never) and 7 (maximum value: Very frequent (daily)) possible

GenZ GenY GenX Baby boomers

FIG. 2.4

GENZ'S TOP 3 USES OF THE SECOND SCREEN FOR FOOTBALL RELATED ACTIVITIES (%)

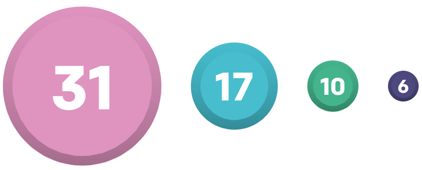


OTHER MEDIA AND THEIR PARALLEL USE TO TV

In addition, the relevance of the media used to follow the Bundesliga, outside the live offering, varies among generations. For baby boomers, the newspaper (M = 5.10; SD = 1.98)[4] is still the most important medium after TV. Younger generations, especially GenZ, tend to use apps (M = 6.14; SD = 1.39) to stay up to date (see Fig. 2.2). It is interesting to note that there is hardly any difference among the generations in intensity club app use.

FIG. 2.5

PERCENTAGE OF PARTICIPANTS THAT REGULARLY USE A SECOND SCREEN



The relatively uniform engagement pattern changes when social media is considered. YouTube (M = 4.79; SD = 1.83) and Instagram (M = 4.02; SD = 2.58) are used with significantly more frequency by GenZ to follow the Bundesliga. The app and website of the respective favourite club follow at a slight distance; Facebook trails all three (see Fig. 2.3). Regarding the parallel use of media, our findings show that parallel consumption does not stop at the Bundesliga. While only 14 percent of all respondents regularly use a second screen to watch football, this figure is already 31 percent for GenZ (see Fig. 2.5).

If we look exclusively at the group of second screen users, 81 percent of the users of a second screen use it for football-related activities and 60 percent for non-football-related activities. Here, too, considerable differences among groups can be seen in second screen use. While 48 percent of baby boomers who use a second screen watch a parallel game, less than 20 percent of GenZ users watch an additional game. Instead, GenZ, GenX and GenY, tend to use the second screen to obtain information about the primary or a parallel game (see Fig. 2.4). This means that it might be useful to increase the availability and quality of game data.

VIRTUAL REALITY

Since the 2018/19 season, matches have been regularly broadcast in virtual reality (VR) in the NBA (NBA, 2018) – also the opening match of the 2016/17 Bundesliga season between Bayern Munich and Werder Bremen, for example, has already been broadcast in VR in the USA (NEXTVR, 2016). It is also interesting to see to what extent, offers in VR could be a substitute for TV consumption in the future.

Our findings suggest that VR devices such as the Oculus VR glasses, cardboards, and PlayStation VR, are hardly widespread among the interviewees. Only about one in six respondents stated that they had a VR-enabled device. Despite low market penetration, it is interesting that 38 percent of GenZ respondents can imagine watching a Bundesliga game in VR and 42 percent can imagine watching highlights in VR, more than in any other generation (see Fig. 2.6). These values are even higher for respondents who have tried VR: 50 percent could imagine watching an entire game in VR and 60 percent could imagine watching highlights.

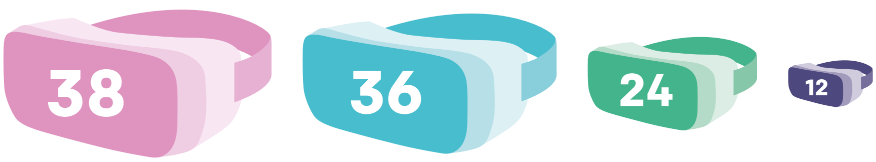
[2] Mean value and standard deviation in response to the question: "How often do you follow the Bundesliga via the Sportschau? (other TV formats for other questions); values between 1 (minimum value: Never) and 7 (maximum value: Very frequently) possible.

[3] Mean value and standard deviation in agreement to the statement "When I watch a Bundesliga game, I watch it mainly on a TV"; values between 1 (minimum value: Completely disagree) and 7 (maximum value: Completely agree) possible.

[4] Mean value and standard deviation in response to the question "How often do you watch the Bundesliga on TV?"; values between 1 (minimum value: Never) and 7 (maximum value: Very frequent (daily)) possible

FIG. 2.6

PERCENTAGE OF PARTICIPANTS WHO CAN IMAGINE WATCHING A BUNDESLIGA MATCH IN VR.



GENZ IS MORE ATTRACTED TO INDIVIDUALIZED PRODUCTS AND, MORE THAN ALL OTHER GENERATIONS, WILLING TO PAY FOR FOOTBALL; IN PARTICULAR, FOR SUPPLEMENTARY OFFERS TO THE LINEAR CORE PRODUCT

GENZ, RAISED DURING AND AFTERTHE FINANCIAL CRISIS AND DRIVER OF THE SO-CALLED SHARING ECONOMY, IS SEEN AS RATHER THRIFTY COMPARED TO ITS PREDECESSOR GENERATION (VISION CRITICAL, 2016). ADDITIONALLY, THEY ARE SAID TO PREFER USING INDIVIDUALIZED PRODUCTS (CRITEO, 2017).

Our findings only partially confirm these GenZ characteristics. Representatives of GenZ appear to be more willing to pay for digital content. This is particularly evident in the willingness to pay for supplementary offers to the linear live product, such as in-match-clip subscriptions and highlight-clip subscriptions. While 69/43 percent of GenZ respondents were prepared to pay for one or both of these subscription forms, respondents from GenY (50/23), GenX (42/18) and baby boomers (30/12) were less willing to do so. Interestingly, representatives of GenZ are even willing to pay more than other generations for supplementary offers. Twenty percent of GenZ participants signalled their willingness to pay five euros or more per month for an in-match-clip subscription (see Fig. 3.1). Furthermore, 18 percent of the representatives of GenZ would spend ten euros or more for an in-match-clip subscription and a highlight-clip subscription combination (see Fig. 3.2). In either case, less than ten percent of respondents from other generations are willing to pay for supplementary offers. Additionally, all supplementary offers were assessed as significantly more attractive by GenZ than by any other generation.

FIG. 3.2
PERCENTAGE OF PARTICIPANTS WILL-ING TO SPEND 10 EURO OR MORE FOR AND IN-MATCH-CLIP SUBSCRIPTION AND A HIGHLIGH-CLIP SUBSCRIPTION

Representatives of GenZ and older generations are willing to subscribe for a term subscription (which includes all Bundesliga matches) to follow the Bundesliga. Of all other[6] subscription forms surveyed, including a subscription that can be cancelled monthly (M = 4.33; SD = 2.07), a term subscription is most attractive (M = 5.03; SD = 1.95)[5] (see Fig. 3.3). On the one hand, this result illustrates the importance the Bundesliga and its media coverage has for this generation. On the other hand, it is particularly surprising given that GenZ is the first generation to grow up with monthly terminable streaming services (e.g. Netflix, DAZN, Spotify).

FIG. 3.1
PERCENTAGE OF PARTICIPANTS WILL-ING TO SPEND 5 EURO OR MORE FOR AN IN-MATCH-CLIP SUBSCRIPTION

INDIVIDUALISATION

In agreement with previous findings (Criteo, 2017), our findings show that GenZ prefers individualized products. While only 23 percent of respondents from generations X, Y and baby boomers combined are interested in suggested individual highlights (e.g. "the fairest scenes of the matchday", "the best tackles of the matchday", "the most exciting ten minutes of the matchday", etc.), 46 percent of respondents from GenZ are interested. 48 percent of respondents from GenZ would use such an offer if it were available, but only 22 percent of respondents from other generations would do so (see Fig. 3.4).

GenZ *GenY* *GenX* *Baby boomers*

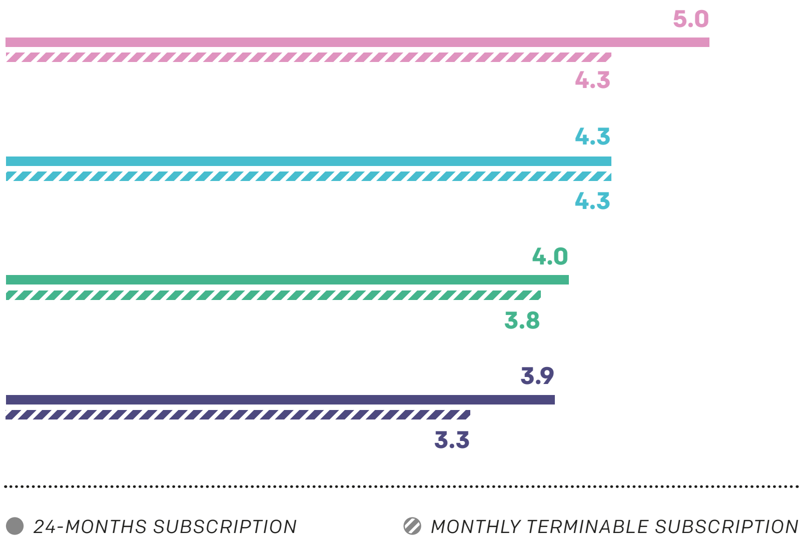
The combination of the higher willingness to pay for supplementary products and the desire for individualisation makes development of specific products for the needs of GenZ promising. In addition, complementary products could also increase involvement from this age group.

[5] Mean and standard deviation to the question, "How do you rate the attractiveness of a term subscription, e.g. over 24 months (assumption: all Bundesliga matches are included)"; values between 1 (minimum value: Not attractive at all) and 7 (maximum value: Highly attractive) possible

[6] Further queried subscription forms: monthly subscription, partial season subscription for the last ten match days, match day subscription, single match subscription, in-match clip subscription, club subscription, last-ten-minutes subscription, highlight-clip subscription)

FIG. 3.3

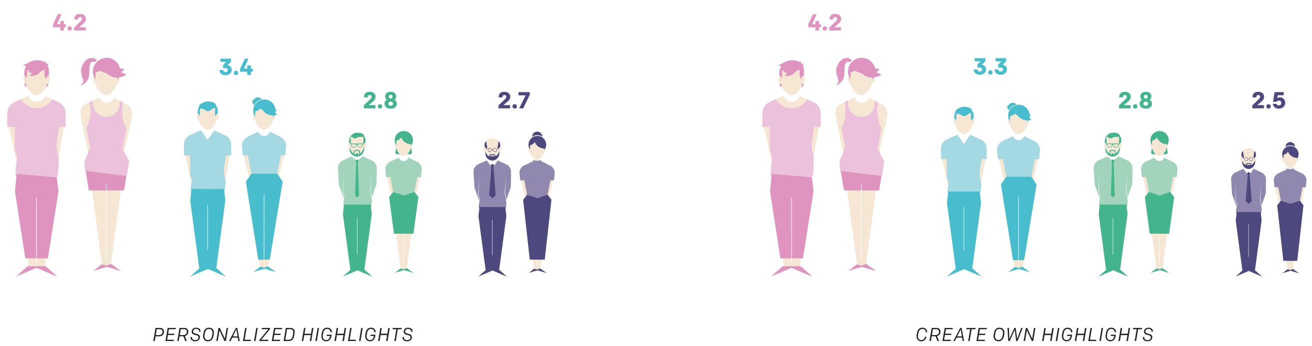
ATTRACITVENESS OF A TERM SUBSCRIPTION (24-MONTHS SUBSCRIPTION) / MONTHLY TERMINABLE SUBSCRIPTION



Question on attractiveness of offering (value corresponds to mea value); values between 1 (minimum value: not attractive at all) and 7 (maximum value: very attractive) are possible.

FIG. 3.4

DESIRE FOR INDIVIDUALIZATION AT HIGHLIGHTS



Consent (mean value) to the statement "I would like to have the opportunity to have highlight clips suggested based on my preferences (e.g. the fairest scenes of the match day, the best tackles of the match day, the most exciting ten minutes of the match day, etc.)"; values between 1 (minimum value: Completely disagree) and 7 (maximum value: Completely agree) possible

Consent (mean value) to the statement "If I could create my own Highlight-Clips, I would use this offering"; values between 1 (minimum value: Completely disagree) and 7 (maximum value: Completely agree) possible

GENZ PREFERS SHORTER AND MORE ENTERTAINING FORMATS; THEY ARE LESS ATTENTIVE WHILE WATCHING FOOTBALL THAN OTHER GENERATIONS

A MICROSOFT STUDY IN 2013 FOUND THAT THE HUMAN ATTENTION SPAN HAS BEEN REDUCED TO EIGHT SECONDS, ALLEGEDLY SHORTER THAN THE ATTENTION SPAN OF A GOLDFISH (MICROSOFT CANADA, 2015). ALTHOUGH THE RELIABILITY OF THIS NUMBER MAY BE DOUBTED (CEROS, 2016), IT IS NOW WIDELY REFERENCED AND ATTRIBUTED OFTEN TO GENZ (E.G. CRITICAL, 2016).

Although our results do not allow us to comment on the attention span of young people's brains, they do show that GenZ's attention to football is lower than that older generations. The survey results indicate that GenZ watches a 90-minute game without interruption significantly less often than other generations (see Fig. 4.1). In addition to lessened attention for football, our results illustrate that GenZ prefers shorter and more entertaining formats than other generations. Indicators include GenZ's preferences for shorter highlight-clips and the Sky conference compared to the Sky single game. While for 36 percent of all respondents seven minutes or less is the ideal duration of a Bundesliga match summary with an average of eleven minutes (M = 10.61, SD = 10.19), there are 58 percent of GenZ respondents for whom seven minutes or less is an ideal duration. The mean of eight minutes in GenZ (M = 7.96, SD = 6.25), is more than 25 percent below the average for Generation X (M = 10.75, SD = 10.03) and more than 40 percent below the average for baby boomers (M = 13.46, SD = 12.42) (see Fig. 4.3).

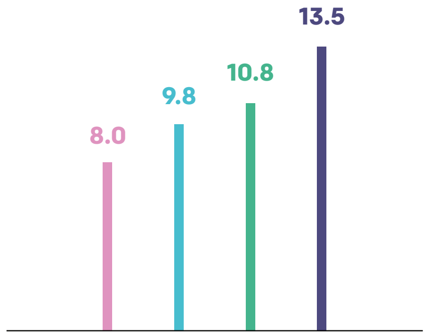
The trend towards entertaining formats is also reflected in the fact that the GenZ is the only generation to watch the Sky conference more often than a Sky single game. Of the GenX participants, more than twice as many watch the Sky single game more frequently than the Sky conference. And, there are almost three times as many baby boomers watching the Sky single game than the Sky conference (cf. Fig. 4.2).

FIG. 4.2
PERCENTAGE OF PARTICIPANTS WHO WATCH THE SKY CONFERENCE MORE OFTEN THAN THE SKY SINGLE GAME AND VICE VERSA

FIG. 4.1
FOLLOWING MATCHES WITHOUT INTERRUPTION

Question of consent (value corresponds to the mean value) to the statement "When I watch a Bundesliga game, I watch it for 90 minutes without interruption and without doing anything else"; values between 1 (minimum value: Completely disagree) and 7 (maximum value: Completely agree) possible.

FIG. 4.3
IDEAL AVERAGE DURATION OF HIGHLIGHTS (MINUTES)



GenZ *GenY* *GenX* *Baby boomers*

OUTLOOK

SURPRISINGLY, WE CONCLUDE THAT PREVIOUS SCIENTIFIC FINDINGS (CRITEO 2017; SPARKS AND HONEY 2014; SCHMIDT ET AL. 2018; WILLIAMS 2015) CAN ONLY PARTIALLY DESCRIBE THE MEDIA USAGE BEHAVIOUR OF GENZ.

Our survey results show that GenZ's media consumption, at least when it comes to Bundesliga football, is initially no reason to worry. In fact, GenZ is the generation with the highest consumption of Bundesliga football matches – consuming mostly via TV. In addition, GenZ often uses a second screen for parallel media consumption of football, which is rarely the case with other entertainment offerings (Johnen and Stark 2015). These findings should encourage those affected in the German football business. Not everything changes overnight, so many approaches of the past can still be right. Nevertheless, the study results offer no reason to rest on one's laurels. There are clear signs that efforts will be needed to maintain GenZ as fans and consumers of the Bundesliga. It will be important to respond to the preference of young viewers for dynamic and personalised formats and to increase the use rate of the second screen for football related purposes through appropriate offers. Openness to VR products could also have an impact on Bundesliga consumption, especially in view of the expected spread of the 5G standard. The future viability of the football business will depend on the extent to which changes in consumer behaviour are anticipated, especially by the younger generation.

METHODOLOGY
DATA SOURCE OF EMPIRICAL ANALYSIS: ONLINE SURVEY OF FOOTBALL FANS AND PEOPLE INTERESTED IN FOOTBALL

THIS STUDY WAS COMMISSIONED BY THE DFL DEUTSCHE FUSSBALL LIGA AND IS BASED ON THE RESULTS OF AN ONLINE SURVEY PUBLISHED ON THE WEBSITE OF THE KICKER SPORTS MAGAZINE (KICKER.DE) IN AUGUST 2018, BEFORE THE START OF THE SEASON.

We conducted the online survey before the start of the 56th season to minimise influence of a game on the results like a defeat of a favourite team on the first matchday.

A total of 7.160 football enthusiasts and fans were surveyed. Of these, 6.178 participants answered the extensive questionnaire with up to 146 questions complete and plausible. Due to the comparatively small group size, the answers of 28 respondents from the so-called silent generation (born 1928-45) were not considered in our analysis.

Accordingly, our analysis is based on the responses of 6.150 respondents aged between 9 and 72 years. In addition to questions on media usage behaviour, all 6.150 respondents also answered questions on their favourite club (cf. Bergmann et al. 2015; Hoegele, Schmidt and Torgler 2014; Mael und Ashforth 1992), use of season tickets (optional) and sociodemographic (e.g. age, relationship status, gender).

PARTICIPANT STRUCTURE AND REPRESENTATIVENESS

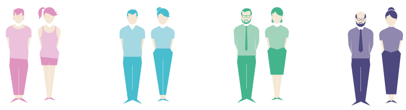
As expected, the online survey was mainly completed by male football fans and enthusiasts. They account for about 97% of the responses.

The average age of respondents is 39.9 years, slightly below the average age of the German population of 44.4 years (Statistisches Bundesamt, 2017). Generation X (born 1965-80) and Generation Y (born 1981-96) account for the largest share of respondents at more than 36% each; Generation Z (born 1997 onwards) is well represented at about 10% of the sample. Unless otherwise stated, the results of this study are statistically significant, but not representative of Germany. This is particularly due to the nature of the website (kicker.de) that hosted the survey, which is mainly visited by football enthusiasts and fans.

METHODOLOGY OF DATA EVALUATION

Descriptive evaluations are largely used to investigate media usage behaviour. Differences among the individual age groups were evaluated for statistical significance by a simple one-way analysis of variance (ANOVA).

TABLE 6.1
THE GENERATIONS AT A GLANCE



General information				
Number of participants	609	2220	2226	1095
Average age (in years)	18.3	30.3	45.6	59.8
Share of males (in %)	97.2	97.3	96.4	96.5
Share of singles (in %)	78.2	27.4	12.2	7.8
Identification with favourite club[7]	3.1	2.8	2.8	2.7
Share of club members (in %)	35.8	42.4	45.3	43.9
Share of season-ticket holders (in %)	14.0	19.9	23.5	25.8
Bundesliga consumption per matchday (in hours)	4.5	4.1	3.7	3.7
Preferences to alternative entertainment options				
I prefer watching football to playing football[8]	3.7	4.2	4.8	5.2
I would rather watch football than play video games[8]	3.8	4.2	5.1	5.5
In general, I would rather watch Bundesliga games than ...				
... matches of the DFB-team[8]	5.7	5.8	5.4	5.3
... Bundesliga 2 matches[8]	5.3	5.1	4.7	4.6
... Premier League matches[8]	5.0	5.3	5.6	5.7
... La Liga matches[8]	5.6	5.9	6.1	6.1
... Serie A matches[8]	6.1	6.2	6.4	6.4
... Ligue 1 matches[8]	6.4	6.5	6.5	6.5
... eSports broadcaststing[8]	6.4	6.7	6.8	6.8
... a movie/a series on a streaming platform[8]	5.5	5.2	5.5	6.0
... Matches of US sports leagues[8]	6.1	5.8	6.1	6.5
... Broadcasting of other sports[8]	5.8	5.6	5.3	5.0

GenZ *GenY* *GenX* *Baby boomers*

Highlights				
I prefer watching a game live rather than in form of a summary[8]	5.9	5.9	5.8	0.6
I would like to get highlights suggested based on my preferences[8]	4.2	3.4	2.8	2.7
If I could, I would put together my personal highlight clips[8]	4.2	3.3	2.8	2.5
Ideal duration of highlights (in minutes)	8.0	9.8	10.8	13.5
Media to follow the Bundesliga				
Frequency of following the Bundesliga over ...				
TV[9]	5.5	5.5	5.7	5.8
Radio[9]	3.1	3.4	4.0	3.9
Apps[9]	6.1	5.7	5.0	4.1
Websites[9]	4.4	5.1	4.9	4.4
Magazines[9]	3.1	3.0	3.5	3.7
Newspapers[9]	3.7	3.5	4.4	5.1
Formats to follow the Bundesliga				
Frequency of following the Bundesliga over ...				
Sky single games[10]	4.0	4.5	4.2	4.1
Sky conference[10]	4.0	4.1	3.6	3.4
Eurosport single games[10]	1.8	1.9	1.9	2.1
Sportschau[10]	4.8	4.2	4.2	4.6
Sportstudio[10]	3.4	3.4	3.6	3.8
Doppelpass[10]	2.3	2.6	2.7	2.9
Third Programs[10]	2.5	2.6	3.2	3.5
Platforms to follow the Bundesliga				
Frequency of following the Bundesliga over ...				
App of favourite club[9]	3.5	3.3	3.8	3.7
Facebook[9]	2.7	3.1	2.1	1.6
Instagram[9]	4.0	2.0	1.4	1.2
Snapchat[9]	2.3	1.2	1.0	1.0
Twitter[9]	1.9	1.6	1.4	1.2
Website of favourite club[9]	3.4	3.8	4.3	4.4
Whatsapp[9]	2.5	1.9	1.9	1.9
Youtube[9]	4.8	3.0	2.3	2.0
Devices to follow the Bundesloga				
I watch Bundesliga especially on ...				
... a television[8]	5.6	5.8	6.2	6.4
... a smartphone[8]	2.4	2.0	1.7	1.4
... a tablet[8]	1.7	1.8	1.8	1.7
... a PC[8]	2.8	2.7	2.1	1.9
Second-Screen and attention				
Share of people who regularly use a second screen while watching football (in %)	30.5	17.2	10.1	6.3
Share of users of the second screen using it to ...				
... comment on a match publicly (in %)	14.0	10.7	10.3	2.9
... comment on a match privately (in %)	42.5	35.6	19.2	8.7
... watch video sequences from the match again (in %)	4.8	1.3	2.2	2.9
... see the match from another camera perspective (in %)	2.7	2.1	3.1	2.9
... get information about the watched game (in %)	54.3	41.1	39.7	18.8
... get information about a parallel game (in %)	56.5	49.0	47.8	44.9
... watch a parallel match live (in %)	19.9	31.7	28.6	47.8
... to pursue a football related activity (in %)	82.3	80.4	79.0	82.6
... to pursue a non-football related activity (in %)	72.0	61.5	58.5	26.1
I am watching a Bundesliga match 90 minutes without interruption[8]	4.4	4.7	4.7	4.9
Share of people who prefer to look in society rather than alone (in %)	68.1	59.6	48.3	43.3
Virtual Reality				
Share that owns a VR-enabled device (in %)	18.6	17.2	13.7	9.5
Share that can imagine watching a game over VR (in %)	38.4	35.8	24.1	11.7
Share that can imagine watching highlights over VR (in %)	42.4	38.5	27.4	15.6
Subscriptions				
Share of households with Sky subscription (in %)	46.6	51.8	48.5	45.9
Share of households with Eurosport subscription (in %)	7.6	9.6	7.8	6.8
Share of households with DAZN subscription (in %)	25.3	20.9	8.4	6.1

[7] The value corresponds to the mean value over five consent questions (cf. Mael and Ashforth 1992); values between 1 (minimum value) and 5 (maximum value) possible
[8] Question of consent (value corresponds to mean value); values between 1 (minimum value: Completely disagree) and 7 (maximum value: Completely agree) possible
[9] Frequency question (information corresponds to mean value); values between 1 (minimum value: Never) and 7 (maximum value: Very frequent (daily)) possible
[10] Frequency question (information corresponds to mean value); values between 1 (minimum value: Never) and 7 (maximum value: Very frequent) possible

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