A Comparison of Media and Live Dominant Sport Consumers.

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Consumption of sport through TV and internet broadcasts continues to become more attractive to consumers as a result of improved quality of sport broadcasts, ‘live against the gate’ broadcasts and the integration of interactive elements with broadcasting. These developments mean that the decision of whether to consume games live at the stadium, or elsewhere via media broadcasts, is becoming increasingly difficult, even for even highly committed fans such as season ticket holders (STH). On the producer side, sport organisations have come to rely heavily on the revenue generated from media broadcasts rights, and are faced with the task of creating and managing products that ensure TV ratings justify the rights spend paid by media companies, while also attracting fans to the stadium. Given this, there is a need to better understand media and live consumers, and how behaviour and attitudes towards products such as season ticket packages may differ.

This study segments and explores STH with variant modes of sport consumption. Data were collected from STH of four Australian Football League (AFL) clubs (n=14,547) through online surveys conducted at the conclusion of a season. Our study focused on identifying differences between two segments within this sample; media dominant consumers (n=2483) who primarily watch games on TV and live dominant consumers, who consume in the majority through game attendance at the stadium (n=1648).

The results showed gender and behavioural differences across the two groups. For example, the live dominant group had higher levels of fandom and merchandise spend, as well as satisfaction levels and likelihood to renew. While age was similar across the groups, media dominant consumers had a higher percentage of males and exhibited different lifestyle stages, which would logically play a role in their decision to consume in a certain manner. We found that particular intangible aspects of the STH package such as service and personal involvement were stronger drivers of satisfaction for media dominant consumers.

Results of this study confirm the theoretical suggestion in past work that variant consumer segments can be formed based on consumption modes as the determining variable. Our two segments only constitute 20% of the entire collected sample, suggesting the bulk of STH balance media and live consumption. However, we find both groups are above the mean levels of the overall sample in terms of consumption and involvement. That measures are above mean is positive and suggests both groups are highly involved, valuable and potentially loyal consumers for the teams, despite their lop-sided consumption habits. That STH can be media dominant consumers, with often very limited involvement in the live product, yet still remain satisfied is also positive. This reinforces that opportunities exist for sport organisations to target and deliver services for such consumers.