

2008 Super  
Bowl Briefing

# CEA-SVG Third Annual Sports & Technology Research Study



*Key insights into how  
consumers use technology to  
watch, interact and follow sports*



**CEA**  
Consumer Electronics Association



**SPORTS VIDEO GROUP**  
ADVANCING THE CREATION,  
PRODUCTION, & DISTRIBUTION  
OF SPORTS CONTENT

## Key Findings

- 40% of HDTV owners purchased their display **specifically** because of sports. This is up slightly from the 2007 figure of 31%. This suggests the combination of the ever greater quantity and quality of sports programming with the ever greater affordability of large flat panel displays is the ultimate win-win for consumers. For sports fans (*see sports fan definition in methodology section*), as expected, sports is even a greater purchase driver (64%). It's worth noting that sports fans are heavy consumers of all types of content, so many purchase their displays as much for movies as for sports.
- The Super Bowl retains the title of top driver of HDTV purchases. Similar to 2006 and 2007, the Super Bowl is followed by 2). College bowl games, 3). World Series, 4). NBA Finals, 5). NCCA March Madness. Moving up the rankings slightly is the Summer Olympics, certainly benefiting from the attention the Beijing site has received. (Note: since this study was conducted during January 2008 in the heart of football season, the results are likely skewed slightly towards football. Conducting the survey in late spring may yield slightly higher rankings for the NBA Finals, NHL Stanley Cup or the Olympics).
- The 2008 Super Bowl will drive the purchase of approximately 2.4 million HDTV units, generating \$2.2 billion in wholesale dollars. Factoring in the multiplier effect of consumers also buying things such as accessories (HDMI cables, universal remotes, and mounting brackets), surround sound audio systems, or content (e.g. Madden 2008 videogame) and the true impact of the Super Bowl on sales is even higher.
- The favorite sports to watch in HD rankings once again feature the big three of football, baseball and basketball. Favorite sporting events to watch in high-definition:

	2007	2008
#1	Super Bowl	Super Bowl
#2	College football bowl games	College football bowl games
#3	World Series	World Series
#4	NBA Finals	NBA Finals
#5	NCAA March Madness	Daytona 500
#6	Daytona 500	NCAA March Madness
#7	Olympics	Summer Olympics
#8	The Masters	Winter Olympics
#9	NHL Stanley Cup	NHL Stanley Cup
#10	World Cup	Extreme sports

- Among all HDTV owners, 81% expect to watch the Super Bowl, while 96% of sports fans plan to watch. The majority will watch at home (61%), with 15% watching at a Super Bowl party and 2% watching at a sports bar. Among the sports fans watching at home, 15% expect to have multiple televisions set-up and tuned into the game.

### How do you plan to watch the Super Bowl?

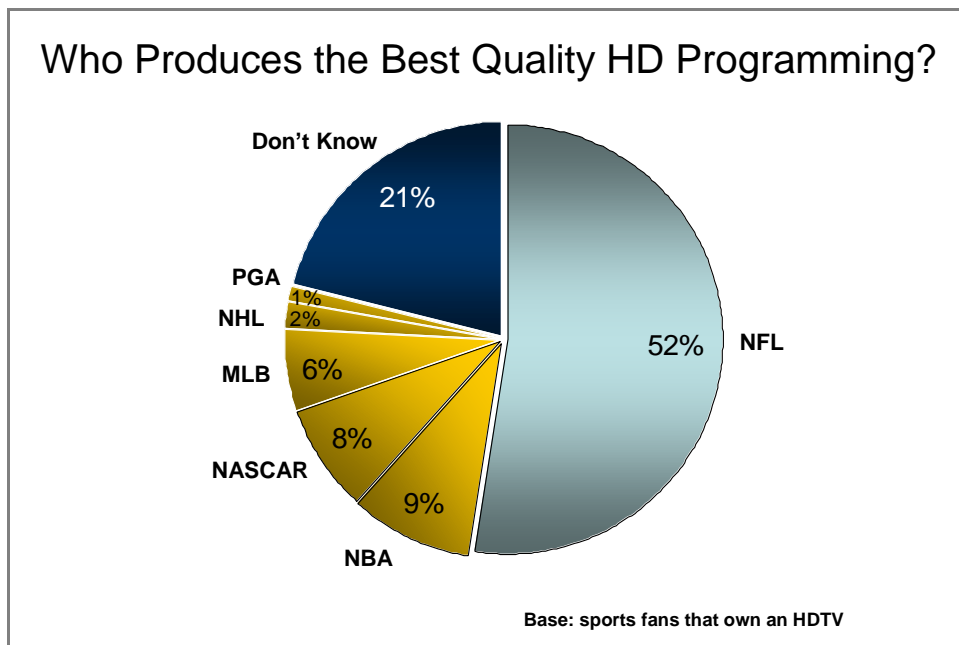
	Overall	Sports Fans	Hardcore Fans
Watch at home alone	11%	12%	13%
Watch at home with small group	35%	42%	40%
Watch at home with large group	15%	19%	21%
Plan to watch at a small SB party	5%	5%	5%
Plan to watch at a large SB party	10%	14%	17%
Plan to watch at sports bar	2%	2%	1%
Don't plan to watch	19%	4%	3%

Base: HDTV owners

- While it may be fun to attend the Super Bowl in person, during the regular season, sports fans say they are quite satisfied with their home viewing experience. Fifty percent of sports agree to the statement “watching sports at home in HD is almost as good as watching in live.”
- In addition to great picture quality and great sound, consumers use other technologies to enhance their Super Bowl experience. For example, 18% expect to have a laptop PC nearby to check stats, IM with friends in other cities, check betting lines or to pull Super Bowl trivia. Another 12% plan to use a PC in another room during the game for the same purposes. Thirteen percent of sports fans expect to check stats via their mobile phone during the game (presumably these are the people watching from a sports bar or at a Super Bowl party).
- The Super Bowl experience doesn’t necessarily end when the game clock expires. Fifty-seven percent of HDTV owners and 65% of sports fans either definitely or probably will go online afterwards to view any especially memorable television commercials.
- Looking ahead, the data suggests sports fans will increasingly embrace technologies that provide greater control over their viewing experience (e.g. time or place shifting – 38% of sports fans want to record HD sports to an HD DVR) and new ways to access their favorite sports content.
- Technological innovation aside, one factor driving this trend is the high number of sports fans that have a favorite team located in a different city. For example, 59% of sports fans say their favorite football team is located elsewhere. With a variety of blackout rules and other barriers, it can be a real challenge to follow an out of town team. Add in college sports and it’s a big issue for many sports fans.

Examples may include:

- Watching highlight clips over the Internet (for football, 40% say they are currently doing it, but over the next 2 years, 65% expect to).
- Subscribing to an online sports video highlights package (for football, 11% say they are currently doing it, but over the next 2 years, 30% expect to).



## Methodology

The report described herein was designed and formulated by the Consumer Electronics Association (CEA) and the Sports Video Group (SVG). The quantitative study was administered via Internet Web form to an online national sample of 2,278 U.S. adults during June 2007.

The margin of sampling error at 95% confidence for aggregate results is +/- 2.1%. Sampling error is larger for subgroups of the data. As with any survey, sampling error is only one source of possible error. While non-sampling error cannot be accurately calculated, precautionary steps were taken in all phases of the survey design, collection and processing of the data to minimize its influence. As it relates to satisficing behaviors among research respondents, steps were taken to identify and minimize satisficing to ensure the highest quality data.

As is common practice in survey research, the data was weighted to reflect the known demographics of the population under study. In this survey, weights were applied to cases based on gender within age, race, region and type of home Internet connection. As a result, this data can be generalized to the entire online U.S. adult population.

The bases shown on all charts and tables are weighted bases. All percentages in the text, charts and tables included in this report are also based on weighted data.

### **Note:**

Throughout this report when the consumer or household is referenced, these terms refer to **online** consumers or **online** households. This is done for simplification purposes and to make the text more reader-friendly.

CEA/SVG designed this study in its entirety and are responsible for all content contained in this report. During the fielding of this study, CEA/SVG employed the services of Survey Sampling to provide email-based sample. The e-mails were pulled as a random sample from a nationally representative panel of online households. Any questions regarding the study methodology should be directed to CEA Market Research staff at [info@CE.org](mailto:info@CE.org).

The Consumer Electronics Association is a member of the Marketing Research Association (MRA) and adheres to the MRA's Code of Marketing Research Standards.

Note: In the analysis and presentation of some data, the following figures were used in calculations.

Total U.S. Population: 294 million  
Total U.S. Adult Population: 220 million  
Total U.S. Households: 114 million  
Percentage of U.S. Adults with Internet Access: 75%

The above data are 2007 projections made by CEA, based on the U.S. Census Bureau's 2005 American Community Survey.

## Definitions

### **Sports Fans:**

Among HDTV owners, 71% rate themselves as a "sports fan." This is a self-reported figure, meaning consumers assess themselves on a 5-point scale from not a sports fan to very much a sports fan. Those falling in the top three categories are included in this report's definition of "sports fan." At times, references are made to "hardcore sports fans." This segment comprises 46% of HDTV owners.