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Soccer’s domination of global TV viewing is now complete

Last year marked a turning point in TV sports viewing trends. Until now, even-numbered years have been dominated by the FIFA World Cup and the UEFA European Championships, and also the IOC Summer and Winter Olympic Games. Odd-numbered years, lacking these quadrennial behemoths, have instead featured American Football at the top of the global viewing league table. No longer.

For the first time, the NFL Super Bowl has been overtaken by the UEFA Champions League Final as the world’s most watched sporting event of the year, with average live global audiences of 106 million and 109 million, respectively. That is not because the NFL Super Bowl is falling in popularity. Far from it. Indeed it achieved record TV audience figures in 2009, both in the US and globally. However, the UEFA Champions League’s audience figures are growing even faster.

Given previous years’ reports highlighting the strength of the FIFA World Cup and UEFA European Championships, Initiative, futures sport + entertainment predicts that the finals of these major soccer tournaments will be the number one ranked global TV viewing event every year for at least the next decade. The only event that is likely to challenge soccer’s dominance is the Opening Ceremony of the IOC Summer Olympics. However, with the 2012 Games being held in London, and 2016 in Rio de Janeiro, the very large time zone differences with China and the rest of Asia-Pacific are likely to mitigate against a serious challenge to soccer’s number one ranking. The most likely competition would instead come if the IOC were to award the 2020 Games to an Asian country, following on from the huge audiences delivered in Beijing in 2008.

Beyond the UEFA Champions League Final and the NFL Super Bowl at the top of the global league table, Formula One takes the bronze medal on the winner’s podium, as it typically does in an odd-numbered year. However, in a change from the norm, the Brazilian Grand Prix was not the most watched Formula One race of 2009. That honour instead fell to Bahrain, with an average live global audience of 54 million people, around half the number who watched the UEFA Champions League Final and the NFL Super Bowl.
Featured events

Over the last seven years, Initiative, futures sport + entertainment has refined and extended the list of events it includes within its survey of the most watched TV sporting events. Prior to each year’s research being conducted, analysts at Initiative, futures sport + entertainment speak with leading sports journalists from a number of respected titles to agree upon which events were believed to have been most influential on the sports field and will be of most interest to commercial parties off it.

A list of major events is thus drawn up from a wide range of sports. These provide opportunities for comparisons across sports, and also between different events from within the same sport. Increasingly, we seek to compare the finals of domestic events, such as the MLB World Series, with their international equivalents, in this case the World Baseball Classic.

The 20 preselected events are as follows:

- American Football: NFL Super Bowl XLIII
- Athletics: IAAF World Athletics Championships – Men’s 100 Metres Final
- Badminton: Sudirman Cup - Final
- Baseball: MLB World Series – Game 6
- Baseball: World Baseball Classic – Final
- Basketball: NBA Finals – Game 5
- Cricket: ICC World Twenty20 - Final
- Cricket: Indian Premier League - Final
- Cycling: Tour de France – Stage 20
- Formula One: FIA World Championship – Bahrain Grand Prix
- Golf: US Masters – Final Day
- Handball: Men’s World Handball Championships - Final
- Ice Hockey: IIHF World Championship – Final
- Ice Hockey: Stanley Cup Final - Game 7
- Motor Cycling: MotoGP World Championship - Italian Grand Prix
- NASCAR: Daytona 500
- Skiing: FIS World Alpine Skiing Championships - Men’s Slalom
- Soccer: UEFA Champions League - Final
- Swimming: FINA World Aquatics Championships - Men’s 100 Metres Butterfly Final
- Tennis: Wimbledon Lawn Tennis Championships – Men’s Singles Final

For each of the events chosen, data were collected from 55 markets, where broadcast. Only live ratings have been measured. Time-shifted broadcasts, highlights, and news clips have been excluded to ensure international consistency in reporting.
# 2009’s most watched TV sporting events

**Figure 1 - Ranking of top twenty events, by average audience (millions)**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Sport</th>
<th>Event</th>
<th>Average audience (millions)</th>
<th>Total audience (millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Soccer</td>
<td>UEFA Champions League - Final (Barcelona vs. Manchester United)</td>
<td>109</td>
<td>206</td>
</tr>
<tr>
<td>2</td>
<td>American Football</td>
<td>NFL Super Bowl XLIII (Pittsburgh Steelers vs. Arizona Cardinals)</td>
<td>106</td>
<td>162</td>
</tr>
<tr>
<td>3</td>
<td>Formula One</td>
<td>FIA World Championship - Bahrain Grand Prix</td>
<td>54</td>
<td>115</td>
</tr>
<tr>
<td>4</td>
<td>Athletics</td>
<td>IAAF World Athletics Championships - Men’s 100 Metres Final</td>
<td>33</td>
<td>95</td>
</tr>
<tr>
<td>5</td>
<td>Tennis</td>
<td>Wimbledon Lawn Tennis Championships (Men’s Singles Final, Roger Federer vs. Andy Roddick)</td>
<td>29</td>
<td>89</td>
</tr>
<tr>
<td>6</td>
<td>Baseball</td>
<td>World Baseball Classic - Final (Japan vs. South Korea)</td>
<td>27</td>
<td>82</td>
</tr>
<tr>
<td>7</td>
<td>Baseball</td>
<td>MLB World Series - Game 6 (Philadelphia Phillies vs. New York Yankees)</td>
<td>26</td>
<td>72</td>
</tr>
<tr>
<td>8</td>
<td>Basketball</td>
<td>NBA Finals - Game 5 (Los Angeles Lakers vs. Orlando Magic)</td>
<td>26</td>
<td>59</td>
</tr>
<tr>
<td>9</td>
<td>Golf</td>
<td>US Masters (Final Day)</td>
<td>21</td>
<td>49</td>
</tr>
<tr>
<td>10</td>
<td>Badminton</td>
<td>Sudirman Cup - Final (South Korea vs. China)</td>
<td>19</td>
<td>56</td>
</tr>
<tr>
<td>11</td>
<td>Motor Cycling</td>
<td>MotoGP World Championship - Italy</td>
<td>19</td>
<td>52</td>
</tr>
<tr>
<td>12</td>
<td>Cycling</td>
<td>Tour de France (Stage 20)</td>
<td>18</td>
<td>44</td>
</tr>
<tr>
<td>13</td>
<td>Ice Hockey</td>
<td>IIHF World Championship - Final (Russia vs. Canada)</td>
<td>17</td>
<td>35</td>
</tr>
<tr>
<td>14</td>
<td>Handball</td>
<td>Men’s World Handball Championships - Final (France vs. Croatia)</td>
<td>17</td>
<td>32</td>
</tr>
<tr>
<td>15</td>
<td>NASCAR</td>
<td>Daytona 500</td>
<td>16</td>
<td>28</td>
</tr>
<tr>
<td>16</td>
<td>Cricket</td>
<td>ICC World Twenty20 - Final (Sri Lanka vs. Pakistan)</td>
<td>13</td>
<td>32</td>
</tr>
<tr>
<td>17</td>
<td>Skiing</td>
<td>FIS World Alpine Skiing Championships - Men’s Slalom</td>
<td>13</td>
<td>31</td>
</tr>
<tr>
<td>18</td>
<td>Ice Hockey</td>
<td>Stanley Cup Final - Game 7 (Pittsburgh Penguins vs. Detroit Red Wings)</td>
<td>12</td>
<td>30</td>
</tr>
<tr>
<td>19</td>
<td>Swimming</td>
<td>World Aquatics Championships - Men’s 100 Metres Butterfly Final</td>
<td>12</td>
<td>40</td>
</tr>
<tr>
<td>20</td>
<td>Cricket</td>
<td>Indian Premier League - Final (Deccan Chargers vs. Royal Challengers Bangalore)</td>
<td>11</td>
<td>23</td>
</tr>
</tbody>
</table>
Audience figures for the UEFA Champions League Final continue to go from strength to strength.

Across the seven years in which Initiative, futures sport + entertainment has been producing its annual world’s most watched TV sporting event reports, the highest viewing figures for the UEFA Champions League Final were achieved in 2008 and 2009. This is a highly impressive performance, especially in light of the extent of audience fragmentation that occurred over the first decade of this century.

Audience appeal is hugely influenced by the identity of the two teams playing in the final. Both the 2008 and 2009 finals featured Manchester United, one of the world’s most iconic clubs. With Barcelona being their opponents in 2009, viewing figures were even higher than in 2008, when the presence of two English teams in the final had a limiting effect on the match’s international appeal.

Barcelona’s victory on the pitch was mirrored in Spain’s top ranking by viewing figures. The comprehensive nature of Barcelona’s success, coming on the back of Spain’s triumph at UEFA Euro 2008, led to very high Spanish viewing figures.

Portugal was ranked second, with particular local interest in FIFA World Player of the Year, Cristiano Ronaldo, in what transpired to be his final appearance for Manchester United before controversially transferring to Real Madrid.

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**Barcelona vs. Manchester United**

- **Date**: 27th May
- **Average Audience**: 109 million
- **Total Audience**: 206 million
2009 was a record year for the NFL Super Bowl, surpassing the 2008 figures to become the most watched Super Bowl of all time. These figures are testament to the enduring and growing popularity of the NFL.

However, the Super Bowl was nevertheless usurped as the most watched global TV sporting event in an odd-numbered year. The UEFA Champions League Final’s year-on-year audience growth was even stronger than that for the NFL Super Bowl, and hence in 2009 the Super Bowl was ranked second.

**Figure 3:**
Countries with highest average live TV audience for the NFL Super Bowl

<table>
<thead>
<tr>
<th>Country</th>
<th>Average Audience</th>
<th>Total Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>1st</td>
<td>162 million</td>
</tr>
<tr>
<td>Canada</td>
<td>2nd</td>
<td>106 million</td>
</tr>
<tr>
<td>Mexico</td>
<td>3rd</td>
<td>162 million</td>
</tr>
</tbody>
</table>

The fall in the NFL Super Bowl’s global ranking can be explained by the limited live audience it attracts outside of North America. Yet again, the event’s top three markets, in terms of highest average live audiences expressed as a percentage of each country’s population, were the US, Canada and Mexico.

While the NFL Super Bowl has secured free-to-air broadcasting deals in a number of important European markets, such as the UK, France and Germany, its distribution and popularity in the key Asia-Pacific region lags far behind that of the UEFA Champions League.
There was a large drop in the global TV audiences achieved by the most watched Formula One Grand Prix of 2009, compared with 2008.

2008 was a record year, with an average global live audience of 78 million people watching the Brazilian Grand Prix. That race featured arguably the most exciting ever climax to a Formula One season, with Lewis Hamilton securing the Drivers’ Championship courtesy of a last lap overtaking manoeuvre.

In contrast, a change in the Formula One race schedule meant that Brazil was not the final Grand Prix of the 2009 season. Although Jenson Button did win the Drivers’ Championship at Interlagos, there was relatively less tension than last year, given that the Abu Dhabi Grand Prix was still to take place.

Instead, the Bahrain Grand Prix was the most watched race of 2009, due to its position in the race calendar. It was the fourth race, following three early-season Grands Prix in Asia-Pacific. Bahrain’s relative proximity to Europe, the key viewing heartland of Formula One, meant that for many European fans this was their *de facto* opening race of 2009.

**Figure 4:**
*Countries with highest average live TV audience for the Bahrain Grand Prix*

Italy and Spain had the highest average live TV audiences for the Bahrain Grand Prix, when expressed as a proportion of each country’s population. However, later in the 2009 season there were marked falls in TV viewing figures in both countries, as a result of Ferrari’s relative lack of success.
Audiences for the Men’s 100 Metres Final at the 2009 IAAF World Athletics Championships in Berlin were 30 per cent higher than those recorded in 2007 in Osaka.

Over the last two years, Usain Bolt has emerged to become the fastest man in history. Although Tyson Gay achieved a notable Gold Medal double in the Men’s 100 and 200 metres in Osaka, his achievements paled by comparison with the World Record-breaking feats of Bolt in Berlin, and also in Beijing one year earlier at the IOC Summer Olympics.

Single-handedly, Bolt has brought millions of viewers back to Athletics. His unprecedented sustained success in breaking the World Record in some of Athletics’s most high-profile disciplines has created a virtuous circle, by boosting the sport’s profile. Additionally, the manner of his performances and his apparent enjoyment proves infectious for many.

Figure 5:
Countries with highest average live TV audience for Men’s 100 Metres Final

While men’s sprinting continues to be dominated by athletes from the US and the Caribbean, in viewing terms the countries with the highest density of TV fans once again came from Scandinavia.
Global TV audiences for the Wimbledon Men’s Singles Final 2009 surpassed even those for 2008. Again, the Final contained a strong narrative even before it started: could Roger Federer win his fifteenth Grand Slam singles title, thereby surpassing the record held by Pete Sampras? Or would Andy Roddick at last win Wimbledon, having been a losing Finalist twice previously.

The quality and suspense of the match were arguably the equal of 2008, and this time the match was not interrupted by rain delays. In the longest Men’s Singles Final in Grand Slam history, both the average and total audience were very high, especially by comparison with Wimbledon Finals in previous years.

Audience growth in 2009 was especially strong in Asia-Pacific. The large time zone difference between the UK and the Asia-Pacific region, combined with the many rain breaks, meant that Asian viewing figures for the 2008 Final were somewhat restricted by the late finish to the match. In contrast in 2009 most of the match took place in prime time in Asia-Pacific. In absolute terms, viewing figures were particularly high in India, thanks to live coverage on the state broadcaster Doordarshan.

In percentage terms, however, the highest-rated countries came from Europe. Swiss viewers were desperate to follow the fortunes of Local Hero Roger Federer, while domestic audiences in the UK were at their highest for any Wimbledon Men’s Singles Final since 2001’s classic Goran Ivanisevic vs. Patrick Rafter clash.
The second World Baseball Classic saw very strong TV audience figures, higher even than for the deciding game at this year’s MLB World Series.

As the only Baseball tournament featuring professional players from all of the world’s major leagues, including the MLB, its international appeal to both broadcasters and viewers was very strong. In contrast with the MLB World Series, the World Baseball Classic secured free-to-air TV coverage in a number of major countries in Asia-Pacific, and it was these that led to the particularly high global ratings for this event.

The success of Asian teams, most notably Japan and South Korea, the tournament Winners and Runners-Up, also helped to drive TV audiences in the Far East.

While the World Baseball Classic Final achieved higher TV ratings than the MLB World Series Final Game in only its second season, the potential for further audience growth is considerable. Both World Baseball Classic Finals so far have been held in the US. If, however, they were held in Japan, for example, it is likely that the global audience would be even higher, by having the game played in prime time in Asia-Pacific.

Greater success by the US team, the world’s most populous major baseball-playing nation, would also help. So far, the US has failed to reach the Final in either of the first two World Baseball Classics.

### Japan vs. South Korea

<table>
<thead>
<tr>
<th>Date</th>
<th>Average Audience</th>
<th>Total Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>23rd March</td>
<td>27 million</td>
<td>82 million</td>
</tr>
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</table>

(Ranking as a percentage of each country’s population)
Baseball
MLB World Series - Game 6

Audiences for the MLB World Series bounced back in 2009, following record-low US TV ratings in 2008. Year-on-year growth in the key US market was the fastest in World Series history.

Partly this was due to the identity of the two franchises in the World Series: the Phillies, the reigning champions, versus the Yankees, the best-supported team in the US. The two teams also had a more closely-matched contest than in recent years, with the World Series continuing into Game 6 for the first time since 2003.

In spite of, for the first time ever, scheduling the World Series to end in November, the games were not adversely affected by the weather. This was in contrast to 2008, when the final game of the Series was suspended after six innings due to rain, with the final three innings played two nights later.

Another important factor that adversely affected audience ratings in 2008, but did not come into play in 2009, was the US Presidential Election. Last year, the final Game of the World Series took place just before voting day, with much of the population’s focus of attention distracted by the Obama-McCain contest. No such competitive scheduling impacted on the popularity of 2009’s World Series.

**Philadelphia Phillies vs. New York Yankees**

**Date**
4th November

**Average Audience**
26 million

**Total Audience**
72 million

In **Figure 8**: 
*Countries with highest average live TV audience for the MLB World Series, Game 6*

( Ranking as a percentage of each country’s population)

Strong audience growth was also achieved across the border in Canada, where the same set of factors helped to boost TV audience ratings.
Basketball
NBA Finals - Game 5

While US TV audience figures for the NBA Finals were lower in 2009 than in 2008, globally viewing figures nevertheless rose, thanks to strong growth in international markets.

Figure 9: Countries with highest average live TV audience for the NBA Finals, Game 5

The 2008 Finals featured the Lakers and the Celtics, arguably two of the most iconic names in NBA history and based in the large media markets of Los Angeles and Boston, respectively. Orlando is arguably a less famous franchise with less well-known players, and is a significantly smaller area than Boston. Nevertheless, even though US viewing figures for the NBA Finals fell year-on-year, the US remained the number one TV market in both absolute and percentage terms.

China and Hong Kong, however, closed the gap to the US this year. Although injured, the winning Lakers squad included Sun Yue, who became the first ethnic Chinese player ever to win an NBA Championship.

This result is indicative of the enormous potential of the NBA in China if ever a more high-profile player, such as Yao Ming of the Houston Rockets, were to play an active role in winning the NBA Finals.

Los Angeles Lakers vs. Orlando Magic

<table>
<thead>
<tr>
<th>Date</th>
<th>Average Audience</th>
<th>Total Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>14th June</td>
<td>26 million</td>
<td>59 million</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Rank</th>
<th>Average Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>1st</td>
<td>31 million</td>
</tr>
<tr>
<td>China</td>
<td>2nd</td>
<td>26 million</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>3rd</td>
<td>22 million</td>
</tr>
</tbody>
</table>

(Ranking as a percentage of each country’s population)
Golf
US Masters - Final Day

The US Masters Tournament is consistently the most watched of golf’s four Majors and achieved 12 per cent year-on-year growth compared with 2008, to an average global live audience of 21 million people.

2009’s event was arguably much more exciting than in 2008. Last year the winner, Trevor Immelman, held the lead at the end of each of the four days of play. In contrast, 2009’s winner, Angel Cabrera, triumphed only after a three-way play-off with Chad Campbell and Kenny Perry.

The greater competitive balance in the 2009 US Masters led to strong audience growth both in the domestic US market, and also internationally, for example in key countries such as Japan and Canada.

Figure 10:
Countries with highest average live TV audience for the US Masters, Final Day

The top three ranking, in terms of the proportion of each country’s population who watched, was identical to that in 2008.

Even though Cabrera comes from Argentina, that country did not rank in the top ten for audience ratings, due to coverage only on pay-TV. His fans in Argentina would most likely have had low expectations of his chances of success, given that he was the lowest-ranked golfer ever to win the US Masters.

<table>
<thead>
<tr>
<th>Date</th>
<th>Average Audience</th>
<th>Total Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>12th April</td>
<td>21 million</td>
<td>49 million</td>
</tr>
</tbody>
</table>
Badminton  
Sudirman Cup - Final

As the balance of global economic and political power increasingly shifts from West to East, so is the relative importance of Asia-Pacific in global TV viewing trends for major sporting events.

This report has already noted that many “Western” sports events have achieved strong audience growth in 2009, due to increased distribution and interest across Asia-Pacific.

However, another manifestation of this regional shift is the relatively high-ranking in this report of the Sudirman Cup in Badminton. Even though this event has incredibly low awareness levels in Western markets, never mind audience figures, Asia is now sufficiently large in its own right that the Sudirman Cup Final could deliver larger TV audience figures globally than famous “Western” events, such as the NASCAR Daytona 500 or the most watched stage in the Tour de France.

**Figure 11:**  
*Countries with highest average live TV audience for South Korea vs. China*

While China and South Korea competed in the 2009 Sudirman Cup Final, the two losing Semi-Finalists, Malaysia and Indonesia, were ranked highest relative to the size of their populations. The latter two countries have far weaker records of sporting success than China and South Korea. This is especially true of Malaysia, which reached its first-ever Sudirman Cup Semi-Final.
The most watched Grand Prix of the 2009 MotoGP season was the Italian Grand Prix. It achieved an average live global audience of 19 million people. This was exactly the same number of people who tuned in to 2008’s most popular race, the Catalunya Grand Prix.

Static global TV audience figures came in spite of a major change in broadcasting strategy. Across many European markets, the pan-regional broadcaster Eurosport was replaced with domestic free-to-air deals, which boosted TV viewing figures in a number of territories. One of these, the switch to Nova, enabled the Czech Republic to rise to third place in the viewing rankings.

However, the two countries with the highest viewing figures, both in absolute and percentage terms, remain Italy and Spain. Their high rankings reflect the sport’s historic popularity in those countries and also the recent successes of Local Heroes Valentino Rossi of Italy, and Jorge Lorenzo and Dani Pedrosa of Spain.

Please note that audience data for the Italian Grand Prix, where possible, are based upon the MotoGP race itself, rather than also including data for the less popular 125cc and 250cc races that preceded it.
Cycling
Tour de France - Stage 20

The combination of unprecedentedly rigorous doping controls and almost no positive tests helped to restore fans’ confidence in the 2009 Tour de France. This led directly to an increase in the global popularity of the event. The most watched stage of 2009 was watched by 6 per cent more fans than 2008’s top-rated stage.

Stage 20, from Montélimar to Mont Ventoux in Provence, was the most watched stage of the 2009 Tour. In a change of scheduling from previous Tours, the ascent to Mont Ventoux, one of the most gruelling Category One climbs, took place on the penultimate day.

As a result, a confluence of positive factors came together to boost TV audience ratings. Mountain stages tend to achieve the highest ratings of the Tour, due to the potential for significant change in the Overall Classification. With both Andy Schleck and seven-times champion Lance Armstrong still within striking distance of Yellow Jersey Albert Contador, this simply added to the suspense.

Figure 13:
Countries with highest average live TV audience for the Tour de France, Stage 20

With this stage scheduled on the final Saturday of the Tour, large numbers of hardcore fans could see this final showdown before the procession into Paris. It also appealed to those millions of more casual viewers whose interest lay primarily in admiring the beautiful, yet harsh, scenery of Mont Ventoux.
Ice Hockey
IIHF World Championship - Final

The global average live audience for the IIHF World Championship Final fell by 16 per cent in 2009, compared with 2008.

This decline was principally due to falling TV ratings in Russia. While it won both year’s Championships and was the largest country in terms of absolute viewing figures, inferior scheduling in 2009 made it harder for Russian fans to watch.

The 2008 tournament was held in Canada, but the Final was deliberately scheduled early so as to maximise TV audience size in the key European markets. As a result, it was aired at 21:00, Moscow time.

In contrast, while the 2009 Final, held in Switzerland, took place in prime time in that country, the two hour time zone difference to Russia had a negative impact on Russian viewing figures. It was broadcast at 22:30 in Moscow. That one and a half hour difference in start time took the event out of peak and into the post-peak daypart.

Figure 14:
Countries with highest average live TV audience for Russia vs. Canada

Latvia and Finland both lie one time zone to the West of Moscow (and many more to most of Russia). As a result, the broadcasting time was more favourable to them, and hence they had the highest average live ratings, expressed as a percentage of their population.
The live global average audience for the Final of the 2009 Men’s World Handball Championships fell by 30 per cent, compared with 2007.

This decline can be entirely explained by a huge decline in German audiences. In 2007, the tournament was both held in and won by Germany. In contrast, 2009’s tournament, held in Croatia, featured the shock exit of Germany even before the Semi-Finals.

Audience growth in other countries, however, was very strong. Key growth markets included Croatia, Denmark, France and Poland.

**Figure 15:** Countries with highest average live TV audience for France vs. Croatia

<table>
<thead>
<tr>
<th>Country</th>
<th>Average Audience</th>
<th>Total Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Croatia</td>
<td>17 million</td>
<td>32 million</td>
</tr>
<tr>
<td>Denmark</td>
<td>17 million</td>
<td>32 million</td>
</tr>
<tr>
<td>Poland</td>
<td>17 million</td>
<td>32 million</td>
</tr>
</tbody>
</table>

Croatia was ranked first, in terms of average audiences expressed as a percentage of each country’s population. Local interest was very high, with Croatia being both the host nation and reaching the Final.

Viewing figures were also strong in Denmark and Poland, the two defeated nations at the Semi-Final stage. With these two teams competing in the Bronze Medal match immediately preceding the Final, many supporters of the Danish and Polish teams stayed tuned to see France play Croatia for the Championship.
NASCAR owes its place in this report to its incredibly passionate fan base, centred predominantly in the south-eastern states of the US. Their loyalty means that NASCAR draws the second largest US television audiences among all professional sports, behind only the NFL.

However, this year the global live average audience for the Daytona 500 fell by 15 per cent compared with 2008. Given the importance of the US in driving NASCAR TV audience ratings, this fall was largely due to the decline in the event’s popularity in its domestic market.

There were two key reasons for this trend. Firstly, the weather intervened. Heavy rain led to the race being called off with forty-eight laps still to go. As a result, the race had to forgo its closing stages, when ratings typically rise.

However, the decline in the TV viewing fortunes of the Daytona 500 mirrored that of other, non-rain affected, races from the Sprint Cup. Many of the other races during the 2009 season also experienced double-digit percentage declines in TV ratings.

Unlike some of the other events in this report, the Daytona 500 was unable to offset falling audiences in its domestic market with growth internationally. There continues to be a very large divide in the popularity of the Daytona 500 in its top two markets, the US and Canada, and the rest of the world.
While the second ICC World Twenty20 was widely regarded as having been a success both on and off the field, there was a large fall in the tournament final’s global TV audience. Its global average live audience declined by 37 per cent, compared with the 2007 tournament.

This decline was partly due to the shock performance of the Indian team. 2007’s reigning champions surprisingly lost all three of their Super Eights matches and hence failed to even reach the Semi-Finals. With India the most populous cricket-playing nation, the failure of their Local Heroes to deliver had a negative impact on audience ratings.

Figure 17:
Countries with highest average live TV audience for Sri Lanka vs. Pakistan

Nevertheless, audience figures when expressed as a percentage of each country’s population were still highest in India. The country’s viewing figures were boosted by live coverage of the tournament on state broadcaster Doordarshan, to complement pay-TV action.

Please note that no peoplemeter data are available from Sri Lanka and Pakistan, and hence the viewing figures from these countries are not included in the overall totals.
Skiing
FIS World Alpine Skiing Championships

Strong audience figures for the 2009 FIS World Alpine Skiing Championships were recorded throughout all of the major European Skiing nations. As the last World Championships before the 2010 IOC Winter Olympics, held in Vancouver, they marked an important occasion for participants to make a pre-Games statement.

Within this, the highest global viewing figures were drawn for the Men’s Slalom. This showpiece event was scheduled for Sunday 15th February, which provided a fitting climax to the overall Championships. Its Sunday scheduling helped to maximise TV audience size.

Local Hero Manfred Pranger’s Gold Medal success in the Men’s Slalom helped Austria achieve second place ranking in terms of audience figures.

Although neither Norway nor Sweden won any medals in the Men’s Slalom, their high audience figures reflected their huge interest in the FIS World Alpine Skiing Championships in general. There was extensive coverage of the entire event on the state broadcasters in both countries, helping to sustain interest right throughout the Championships.

### Men’s Slalom

<table>
<thead>
<tr>
<th>Date</th>
<th>Average Audience</th>
<th>Total Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>15th February</td>
<td>13 million</td>
<td>31 million</td>
</tr>
</tbody>
</table>

Figure 18:
Countries with highest average live TV audience for Men’s Slalom

(Ranking as a percentage of each country’s population)
Ice Hockey
Stanley Cup Final - Game 7

The deciding Game of 2009’s Stanley Cup features in this report thanks to an epic conclusion to a highly competitive Finals. The Final was only decided in Game 7 - the ideal outcome to maximise suspense and audience ratings.

Viewing figures were especially impressive in the US, where Game 7 drew the largest audiences since Game 6 of the 1973 Stanley Cup Final between Montreal and Chicago.

Figure 19:
Countries with highest average live TV audience for Pittsburgh Penguins vs. Detroit Red Wings

These audience figures mark an impressive comeback for the NHL from the lockout that resulted in the cancellation of the 2004-05 season.

Nevertheless, a large gap existed between viewing figures in Canada and the US, the top two rated markets, and Slovakia in third place. The relative lack of both distribution and audience in Ice Hockey markets throughout Europe meant that the deciding Game of the Stanley Cup drew a smaller global audience than the Final of the IIHF World Championships. This dominance of international compared with domestic events is in common with a number of other sports included within this report.
The Aquatics events are typically among the most popular disciplines at the IOC Summer Olympics, and so this year the World Aquatics Championships were included in this report, in order to understand the sport’s popularity outside of the Olympic Games.

Analysis of TV audience figures showed that the most watched event at the FINA World Aquatics Championships was the Men’s 100 Metres Butterfly Final. This event was held in primetime on a Saturday evening in the key European Swimming markets, which helped to maximise the event’s appeal.

While the Final featured yet another World Record from American Michael Phelps, the highest-ranking markets when expressed as a percentage of each country’s population, all came from Europe.

First place went to Serbia. **Local Hero** Milorad Cavic broke the Men’s 100 Metres Butterfly World Record himself in the Semi-Finals, and hence there were high expectations he could win the Gold Medal.

The **Host Nation** effect was also strong. Italian audiences were high throughout the Championships, with them being held in Rome.
The global live average audience for the 2009 IPL Final was 7 per cent lower than in the competition’s inaugural year.

However, this was a comparatively small decline given the massive dislocation experienced before the start of the 2009 tournament. As a result of terrorist attacks in Mumbai, the IPL was relocated to South Africa at short notice, where it proved a huge success, in spite of circumstances.

In spite of lower audiences in India in 2009 than in 2008, India remained the number one market for the IPL Final, as a percentage of each country’s population. South Africa overtook Australia to take second place. Hosting the IPL in South Africa proved to be very popular, especially among that country’s large ethnic population from the Indian sub-continent.

*Initiative, futures sport + entertainment* expects that audience figures for the IPL will rise again in 2010. Partly this will be due to the tournament returning to its domestic Indian market.

Also, cricket fans around the world will benefit from much more convenient distribution of matches. In a broadcasting first, all matches at the 2010 IPL will be broadcast live on YouTube (except in the US). With previous years’ events having been televised on pay-TV in most countries, its availability via broadband will facilitate millions more people to watch the IPL for the first time ever.
How Initiative, futures sport + entertainment’s approach differs from other published reports

Our 55 surveyed markets provide analysis to give an unrivalled insight into international TV viewing through a truly global perspective. Together these markets accounted for over 90 per cent of the world’s advertising expenditure and GDP in 2009.

This analysis is based on in-home viewing of live broadcasts. Highlights programmes, magazine shows, and news clips have not been included in order to maintain international consistency. Out-of-home audiences have also been excluded since they are not officially measured in any country.

ViewerTrack reports always quote viewing data for the entire length of a broadcast, both for the sake of consistency and for greater accuracy when considering the value of sports properties from an advertising and sponsorship perspective. Brands receive significant exposure during the entire duration of sports programmes, so we feel it would be inappropriate to quote only viewing figures from a selective part of it.

It is important to stress this difference in approach since it helps to explain why in some cases there may be disparities between the figures reported by Initiative, futures sport + entertainment from those more broadly published in the press.

The rank order in this report has been shown in terms of total audience—or reach—as well as average live audience. This is to provide additional depth to the TV viewing analysis, in comparison with the cumulative viewing data quoted by some companies in the industry. This is a very important distinction to draw since average audience data are the standard approach used in establishing industry trading currencies worldwide. The total audience in turn helps to put the average audience into context, since the difference between the two is a reflection of the extent to which viewers tune in and out of a programme. In other words, those events where the total audience is much higher than the average live audience are those where viewers selectively choose which parts of the events they want to watch.

Viewing varies markedly throughout the course of sports programmes. If only total audience figures were quoted, rather than in addition to the average live audience, then the audience would be overestimated at any particular moment when a sponsor’s brand is on-screen. It is thus vital to provide this additional degree of accuracy in order to value sports investments as robustly as possible.
Initiative, futures sport + entertainment is a strategic consultancy and part of leading media communications network Initiative. We work directly with federations, teams and sponsors to help them understand their audiences, media exposure and fan attitudes.

We have worldwide reach, using the same measurement toolkit in every country, equipping us with internationally consistent data and analytical techniques. This enables us to understand how sport works as a business driver and the reasons for differences between one country and another.

We have developed a strong international reputation for objective views and insight into both the business world of sport and activity on the field. We have a market-leading, sophisticated approach for verifying data accuracy.

Our analysis goes beyond data interrogation. By interpreting the output, we are able to provide an understanding of both commercial significance and value. Initiative, futures sport + entertainment reports in a language that you understand and does not hide behind jargon. This ensures our research has the widest possible use throughout client organisations.

Initiative (www.initiative.com) is a media, marketing and digital company that transforms media exchanges into marketing results. Owned by the Interpublic Group, Initiative is part of media management group Mediabrands and a partner of Magna, IPG’s centralized media negotiation entity. Initiative employs more than 2500 talented professionals, working in 91 offices across 70 markets, worldwide. Initiative’s comprehensive range of marketing-led communications services include: research and insight, media planning and buying, digital communications solutions, content creation, and evaluation and accountability services.

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