Millennials' motivation to consume sport content online

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Abstract

Until fairly recently, South Africans' opportunities for sports spectatorship were limited to real life events or traditional media, such as linear television. Due to the proliferation of streaming services and media content that have become available over the Internet in recent years, South African sports enthusiasts now have the widest range of access to a myriad of digital platforms that are available anytime and anywhere (ICASA, 2018). The first adopters with the widest access to these new platforms are young (Millennial) sports enthusiasts. As this consumer group grows in purchasing power, so does their influence on how sport content is presented and will be presented in the future, as well as the financial viability of service providers in the future.

The purpose of the study is to gain empirical evidence of the sports consumption behaviour of the emergent Millennial consumer in South Africa, with specific focus on the different media sources used to view sports content, as well as their motivations to do so.

A positivistic approach was taken to the research design, to enable the gathering of quantifiable evidence through an online electronic survey: 175 valid respondents made up the sample. Although the sample size was large enough to merit the anticipated statistical analyses, the findings were unfortunately not generalisable as the sample was not representative of the target population in Gauteng in terms of the demographic split.

Results revealed that of all the technologies available, traditional live TV is still the most preferred medium for sports viewing. Evidence of interest in certain media may be indicative of more pertinent trends in the future. The strongest motivations that spurred Millennials' use of online for sports consumption, seem to be ***Convenience and control,*** followed by a relatively strong motivation to enhance **Personal interest and preference,** to gain **Value for money and Affordability**, and for **Customisation and Entertainment.** Demographic differences are limited to one of the motivational factors, namely **Social interaction**, that is not a strong motivation compared to the others.

The research concluded with recommendations to broadcasters, highlighting the need to provide online service offerings that make use of the media's superior functionality in order to meet Millennials' need for convenience and control of their sport content consumption.

Keywords: Millennials, Motivation, Online Sport Content Consumption

Declaration

I declare that this research project is my own work. It is submitted in partial fulfillment of the requirements for the degree of Master of Business Administration at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

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CHAPTER 1: INTRODUCTION TO RESEARCH PROBLEM

1.1 INTRODUCTION AND BACKGROUND

Popular sports events are coveted by broadcasters due to their unique ability to draw unsurpassed media attention. Spectator interests amass in the millions, making content coverage highly desirable for advertisers to reach a large captive audience in a short period. It can be proven that advertising during sports events is more effective, not only reaching a large audience, but the increased likelihood of more extensive exposure to frequency of message as spectators devote hours to viewing these events (Gijsenberg, 2014).

Sports viewing is highly desirable due to the perishable nature of live sport, with indication that "90% of viewers who watch a sport broadcast will do so live" (Deninger, 2012, as cited by Fujak, Frawley, & Bush, 2017, p.106). Paul and Weinbach (2015) explain that sport broadcast remains one of the few programs that receive highest viewership ratings. This fact holds true in the South African market, with MultiChoice insights confirming that the primary driver for DStv Premium subscription and the highest viewership ratings is sport (MultiChoice, 2018). This in turn has revenue benefits as broadcasters can charge a premium for advertising airtime based on the potential audience that the channel can reach.

Weeds (2016) describes how competition in pay TV centres around programme content. Consumer service provider preference is based around the programming available on their channels. Premium programming including live sports coverage and newly released movies and exclusive series attracts customers and drives subscription choice. Exclusively having this content available to a single pay TV service provider in a region, increases the value held by the provider and is used as a competitive strategy to increase market share from rivals.

It has been the norm of pay TV providers to compete for audiences and ultimately subscription revenues. However, with the advent of new media diluting this exclusivity Lim and fellow researchers (2015) reveal that Pay TV providers now have an urgent interest in developing means that can improve viewer commitment. The authors' study focuses on sport channel commitment, which they define as "a sense of positive regard for and attachment to a sports channel" (Lim et al., 2015, p.160). The authors observed this proliferation of content trend in 2014 during the Sochi Winter Olympic Games, where rights were non-exclusive in South Korea. They documented the strategy used by most

broadcasters to differentiate their broadcast, where customers were served unique content by Pay TV providers that owned new media platforms referred to as so-called "second screens". Lim and co-researchers (2015) highlight the concerns held by television producers, sponsors and advertisers, who are carefully monitoring viewers' second screen activity, particularly observing the resultant effect on channel selection, switching behaviour, viewership ratings and cord cutting behaviours (viewers' tendency to drop their TV services).

Measurement and data analytics insights company Nielsen that assists global broadcasters to monitor and report on viewership ratings, have posed that the greatest question for sports rights holders, is whether media content rights revenues will be maintained, given the digital disruption that the conventional TV industry is undergoing. "In developed markets, pay-television has been the engine of media revenue growth for two decades or more. Now, it's a business that has come under pressure from many angles, including stagnating wages, market saturation, cord-cutters, cord-nevers, skinny bundles and low-priced OTT services" (Nielsen, 2018, p.4). Pay TV operators face competition from both traditional and non-traditional sources, affecting budget availability for sports rights (Nielsen, 2018).

ICASA (2018) published evidence of this emerging trend in the South African market, noting the rapid change of access to audio-visual services, just five years prior where consumers were limited to a traditional TV set and only what broadcasters of the time could televise locally. Now consumers have access to unlimited content, which can be accessed anytime and anywhere on a range of devices. "As a consequence, traditional FTA TV and particularly Pay TV services in SA are under threat." (ICASA, 2018, p.1). These providers now face competition from both local and more formidable international audio-visual electronics giants such as Netflix, Amazon Prime Video, Apple, Google/YouTube and Facebook.

Consumers' access to broadband and connected mobile devices has increased consumer adoption of streaming services. Mobile subscription in South Africa stands at 88 million users, of which 25 million are for smartphones. The phenomenal growth in mobile data usage and the consumption of electronic audio-visual content online in SA demonstrate that broadband speeds and data costs are not a barrier to the adoption of OTT services in SA. Research indicates that South Africa has the second highest growth in mobile electronic audio-visual content consumption of any market in the world. Research has also indicated that South Africans younger than 34 years of age, have

expressed the highest level of interest in subscribing to multiple on-demand electronic audio-visual services of any similar population in the world (ICASA, 2018).

This younger emerging consumer group is referred to as Millennials, and were born between 1984 and 1998, thus currently younger than 35 years of age (Lantos, 2014). This is the largest age cohort presently, with increased purchasing power. Although they have attracted considerable scholarly attention from marketing and sociology faculties, limited attention has been devoted to them by sport researchers (Fromm & Garton, 2013). They are considered to be the first high-tech generation. These digital citizens possess multi-tasking abilities facilitated by technology. Their daily activity evolves around digital social interactions and media consumption that are geographic and time boundless (Lissitsa & Kol, 2016). It is a norm for them to engage with multiple media portals simultaneously, and they are constantly engaged in social conversation, being driven by FOMO - the *Fear of Missing Out* (Fromm and Garton, 2013). Their group interactions are with a diverse group of peers and are therefore more likely to be open-minded and to adopt new products, services and innovations sooner than previous generations. (Dotson, Clark, Suber, & Dave, 2013)

Based on the above, having an understanding of the emerging media consumption preferences of this Millennial customer segment that has growing purchasing power, will allow pay-TV sport broadcasters to diversify their offering to provide new media services that comply with market needs. The critical outcome is an understanding of the mix of media content that service providers need to offer, to allow acquisition through interesting content whilst enabling revenue generation, as traditional subscription revenues are bound to decline over time. Indisputably, the new segment has come to dominate the consumer market.

The importance of the Millennial consumer in developed markets such as the United States has already been recognised in literature (Valentine & Powers (2013)), also emphasising that Millennials are the largest consumer group in US history. Consisting of approximately 56 million people, their purchasing power will continue to grow given the sheer size of this cohort, and as a result of more individuals entering the workforce in the near future. This also holds true for the emerging market, size and purchase power of South African Millennials. Duh and Struwig (2015) estimate that South African Millennials' purchasing power is approximately R93 billion annually and growing as they enter the workforce. Millennial South Africans represent the first generation to enjoy the spoils of a post-apartheid era. They have been afforded the greatest opportunity for education and subsequently, increased wealth creation. Egan, Lappeman, Jorgensen,

Tembo and Ferreira (2018) describe the consequence of a fast paced social, economic and technological landscape that has driven the cohort to seek successful career paths to improve earning potential to improve their social status and to acquire related lifestyles. Therefore, brands should take note of this growing segment as they influence in the market and as their purchasing power increases.

To date, little research has been done on Millennial sports fans, neglecting research on Millennials who consume sport content online, which has not been done by previous generations because the technology was only introduced in South Africa in the late 1970s. Therefore, a culture of sports viewing on television and other devices only developed thereafter. Identifying the sports consumption behaviours and motivations of Millennials is important, because this generation will soon be the dominant consumption group in the country (as well as globally) as they become more economically active and increasingly influential in decision making. Further to that, they are the parents of the next generation that will be socialised in particular ways through the example of their parents.

1.2 THE RESEARCH PROBLEM

In the recent past, the opportunity to view live sport was limited to in-stadium and live TV coverage. Carroll (2016) describes how historically, television was considered the best medium to effectively reach audiences, compared to more recent times where television broadcasters find themselves in persistent competition for viewers' attention through other digital platforms. The majority of cord-cutters (those dropping their TV services) are younger, tech savvy consumers (Millennials) who have ceased their use of pay TV in favour of OTT (over-the-top) content. For them, the Internet and other online content sources provide an adequate substitute for their viewing needs (Fuduric, Malthouse, & Viswanathan, 2018). It can therefore be inferred that the consumption of sports content online is highly desirable for this cohort. As these consumers dedicate more time and revenue toward online consumption, it is necessary for companies to understand the benefits that they seek, and inclinations behind the use of the Internet and during their online activity. "Motivations are an important component among the aspects which define people's behaviours. They stem from unmet needs and represent, through concrete actions, the benefits which people hope to achieve." (Martínez-López, Pla-García, Gázquez-Abad, & Rodríguez-Ardura, 2014, p.189).

The problem being investigated, is that sports spectatorship opportunities are no longer confined to traditional modes including linear television, radio, newspaper and the actual stadium experience. These are fast being eroded by a myriad of digital platforms that are literally available in the palm of one's hand, to be used anywhere. The first adopters with the widest access to these new platforms are young (Millennial) sports enthusiasts. As this consumer group grows in purchasing power, so does their influence on how sport content is presented and will be presented in the future, as well as the financial viability of providers in the future.

Millennials are characteristically driven by peer pressure and the phenomenon of FOMO (the fear of missing out), combined with the desire to experience pleasure or fulfilment without delay or deferment ('I want it and I want it now'). They have therefore developed many creative ways to satisfy their craving for instant gratification. They for example consume sports content in any form that is convenient to them to avoid being isolated from the conversation: following games online, or through social media utilities, and by "sharing" log-in credentials to stream services, to name a few (Przybylski, Murayama, DeHaan, & Gladwell, 2013). It is this endeavour of satisfying their instant need for sports content, coupled with the wide availability of online platforms offering sports content, that is driving down the revenue generation opportunities for traditional sports content service providers - making the future of linear TV viewing uncertain.

There is a lack of conclusive evidence - specifically in a South African context that is unique in terms of the plurality of society - on the factors that coherently motivate Millennials to rather consume sport content online than to make use of traditional media to fulfil their needs. It is unclear what benefits they seek, the level of control, desire for convenience, and customisation that they are looking for in sports content delivery and how traditional sports content providers can adapt their offering to satisfy sports enthusiasts' unmet needs.

1.3 PURPOSE OF THE STUDY

Gaining empirical evidence of the sports consumption behaviour of the emergent Millennial consumer, with specific focus on the different sources used to view sports content, as well as their motivations to do so, is the purpose of this study. From a theoretical perspective, it will reveal their current online consumption behaviour that could be useful to anticipate their future needs with regard to sports viewing to mitigate the decline in revenue earned by traditional service providers. This is important as a content provider needs to serve them better in terms of their needs and expectations,

especially as this market segment's purchasing power is bound to increase over time. This makes them a viable market segment to keep track of. Outcomes can assist broadcasters to remain relevant and to increase subscriptions rather than to continually be concerned about dwindling viewer numbers. Having the relevant information, marketers would also understand how to meaningfully reach these consumers by providing relevant content on media platforms they consume intuitively in aid of building brand equity, to persuade and encourage them to purchase (subscribe) to a particular service and to continue to do so in the future.

1.4 THE BUSINESS NEED FOR THE STUDY

What is known, is that technological disruption continues to change the operating and competitive landscape for pay TV providers in South Africa. It is therefore critical to understand these emergent trends, their effect on broadcast media and the needs of new customer markets in order to secure revenue for the future. Having an informed understanding of Millennials as a generational segment can aid to more effectively reach and serve this market. What has not been explored and documented empirically to date, is the degree to which South African Millennials are adopting their sports content viewing and the impact of their behaviour on their future subscription intentions. The study aims to explore the existing trend of sport content viewing of Millennials on a range of platforms, including new media, specifically their media preference; the frequency and duration of their sports content consumption; their motivations to consume sports by means of media platforms other than the traditional TV sports channel, also distinguishing demographic differences within the Millennial cohort.

1.5 THE THEORETICAL NEED FOR THE STUDY

Despite the prevailing evidence of the emergent purchasing power of the Millennial consumer, this topic is not yet fully explored in emerging markets, particularly for South Africa. The study aims to expand the currently limited literature on the South African Millennial generation.

This explorative, descriptive, quantitative study aims to establish reliable findings of South African Millennials' online sports consumption motivations that could inspire future representative and more generalisable studies combining the "Transaction Utility and Acquisition Utility theory" (Thaler, 1985); as well as "Uses and Gratification Theory "(Ko, Cho, & Roberts, 2005) as theoretical frameworks.

1.6 RESEARCH AIM

The aim of the study is to investigate and provide empirical evidence of the online sports consumption habits of a specific demographic group, namely the Millennials, as a viable future market segment, with specific attention to their underlying motivations for consuming sports content online, to enable traditional service providers to better serve their sport viewing needs in the future.

1.7 RESEARCH OBJECTIVES

The following objectives were formulated to address the aim of the study:

1. To investigate and describe Millennials' online sport consumption in terms of:
     1.1 frequency of sports viewership, and
     1.2 duration of sports viewership
     1.3 media used
2. To investigate and describe Millennials' motivation to consume sport content online:
     2.1 discriminating the strength of different motivational factors
     2.2 discriminating significant demographic differences (gender, age, household income and population group differences) in motivation within the Millennial age cohort.
3. To compare Millennials' motivation to consume sport content online in terms of:
     3.1 the frequency of their sports viewership, and
     3.2 duration of sports viewership. correlate

1.8 RESEARCH DESIGN AND METHODOLOGY

1.8.1 Research design

Because a positivistic approach was taken, quantifiable evidence could be gathered (Malhotra & Birks, 2007), following a deductive approach, where theory from existing literature is used to deduce research questions (Saunders, Lewis, & Thornhill, 2009). The survey entailed a structured online questionnaire designed for self-completion, with the intention to collect quantifiable data that could be analysed numerically. The survey was only administered once to the sample, making it a single-phase investigation that is cross-sectional in design (Creswell, 2014). The study targeted Gauteng Millennials who were born between 1984 and 1998, thus younger than 35 years at the time of the study

(Lantos, 2014), limiting participation to sport enthusiasts who have consumed sport content over the past 12 months.

1.8.2 Methodology

1.8.2.1 Population and sampling

A sampling frame could not be developed from the target population due to lack of resources (financial and time), therefore the study used non-probability sampling (Saunders et al., 2009). Due to the geographical span of Gauteng, a combination of purposive, self-selected convenient and snowball sampling methods (Creswell, 2014) were chosen to ensure inclusion of a wide reach of valid prospective respondents.

1.8.2.2 Measurement instrument

A self-administered online questionnaire was utilised to collect data from respondents (Phillips, Rivers, & Moy, 2015). The questionnaire comprised of three sections. When a potential respondent who showed interest in the study's invitation clicked on the link, it began with a preamble detailing the purpose of the research, also presenting a consent form. The two sections that followed, included questions related to demographic information and the respondent's extent of use of sport content consumption online. The third section encompassed 36 questions prepared from a basis of tested multi-item scales derived from literature, including five of the eight dimensions relating to "Utilitarian Motivation" designed by Martinez-Lopez, Pla-Garcia, Gazquez-Abad and Rodriguez-Ardura (2014), as well as two of the four dimensions of the "Uses and Gratification" theory by Ko, Cho and Roberts (2005) that were adapted for incorporation in a questionnaire that measures a user's online consumption motivations.

1.8.2.3 Measures to eliminate error

A number of measures were taken to ensure that data was meaningfully collected, in order to establish validity and reliability of the research process, (Creswell, 2014). The measures included pre-testing of the questionnaire by ten respondents that fit the pre-requisites for the sample (age; sports viewership) to enable adjustments to rectify shortcomings. The reliability scores from prior use of the instruments were used to establish its reliability initially, admitting that this study would again be subjected to

reliability testing as it has not been conducted in this context before (Creswell, 2014). The scales therefore underwent reliability testing again by calculating Cronbach's Alpha to ensure their reliability in a South African context before interpretation of the results.

1.8.2.4 Data collection

Using the SurveyMonkey platform, data was gathered per a self-administered survey. The link to the survey was posted on social media platforms including Facebook and Twitter of popular sport personalities' accounts, including Carol Tshabalala, Motshidisi Mohono, Clinton van den Berg and Lindiwe Dube with a combined following of near 1million followers. Data collection commenced on the 13th of August and closed on the 1st of September with a total of 252 responses obtained.

1.8.2.5 Ethical considerations

Ethical considerations were strictly adhered to at each stage in the research study process. Prior to the study, ethical approval was applied for, and grated from the University of Pretoria before data collection commenced. The researcher was vigilant about the study on human subjects, i.e. that outcomes should produce some positive and identifiable benefit for them and that participants' values, decisions and opinions had to be respected, as well as that all participants should be treated equally (Creswell, 2014). The researcher is confident that all data collected, and the integrity thereof was upheld, no manipulation of data nor biased or untruthful reporting of data occurred.

1.9 DATA ANALYSIS

Once completed, the data from the online platform was collected, exported, and numerically coded to share with an external statistician who assisted with statistical analyses of the data (Wegner, 2016). Descriptive statistics including frequencies, percentages, means, standard deviations, were performed first on the demographic information, to inter alia describe the sample. Thereafter Exploratory Factor Analysis (EFA) was done to explore the different factors/ dimensions (utility values) of the scale in the context of this study. This included calculation of Cronbach's Alpha (aiming for values >0.7); percentage of variance in the data (anticipating total variance explained >60%); means, standard deviations. ANOVA and t-tests were used to observe significant

demographic differences for each dimension (Kent, 2015). Finally, correlational analyses were used to measure the strength of linear associations between variables.

1.10 DEFINITIONS

The following constructs and acronyms were used pertinently in this study:

Term	Definition
Black Twitter	A sub-society on Twitter (social network), where individuals tweet and comment about issues pertaining to the black community
Broadcaster	An institution that distributes audio and video content
DTH	Satellite television that delivers programming direct to a viewer's home
FOMO	The Fear of Missing Out
FTA	Traditional television broadcasters who air programming that is offered free of charge to viewers. Usually a national broadcaster
ICASA	Communications regulator - Independent Communications Authority of South Africa
Traditional or Linear TV	Traditional television programming, that is aired based on a schedule at a specific time
Live TV	The broadcast of an event that is happening in real time
OTT	Over the Top – Content provider that streams
Pay TV	Subscription based television provider
Sports Content	The attendance or viewing a live match AND/OR watching match highlights, news programs, social media, documentaries, participating in online fantasy and prediction sport games
Online fantasy and prediction sport games	A fantasy and prediction sport game involves participants engaging in virtual versions of professional sports leagues, teams and individuals compete based on the players and teams real statistical performance
Viewership ratings	The number of households that are viewing a program as it is broadcast linear or live

1.11 CHAPTER SUMMARY AND LAYOUT OF THE STUDY

The integrative business research report is arranged into seven chapters and is laid out as follows:

Chapter 1: Introduction to Research Problem

An introduction to the study, presenting the research problem, objectives as well as the business and theoretical need for the study are included in this chapter. An overview of the research methodology, data analysis definitions and document overview are supplied as well.

Chapter 2: Literature Review

A comprehensive literature review gives context to the study, expanding on the Pay TV market in South Africa, the importance of sports viewers and digital media disruption. Theoretical constructs are described in terms of motivation of online consumption and linkages to generational cohort theory with particular focus on Millennials.

Chapter 3: Research Questions

The exact purpose of the research, including the research objectives formulated to address the aim of the study are encompassed in this chapter.

Chapter 4: Research Design and Methodology

Here, a comprehensive description detailing the research design and methodology that were chosen for this quantitative investigation, detailing design specifics, the unit of analysis, population, sampling method, data collection process, operationalisation of the constructs, as well as measures to eliminate error and to ensure ethical conduct, are discussed.

Chapter 5: Research Results

Results are presented in this chapter, in accordance with the objectives of the study, based on implementation of descriptive and inferential statistics, also presenting outcomes of reliability tests.

Chapter 6: Discussion of Results

Within this chapter the results are presented in terms of the research aim and objectives, linking the findings to literature, also indicating whether the study objectives have indeed been met.

Chapter 7: Conclusion

The document concludes with a summary of the main research findings, recommendations for business, an indication of the limitations of the study as well as opportunities for further research.

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CHAPTER 2

LITERATURE REVIEW

CHAPTER 2: LITERATURE REVIEW

2.1 INTRODUCTION

The chapter aims to provide theoretical underpinnings of the study. It intends to discuss the prominent constructs that relate to the research problem that entails an investigation of Millennials' motivations to consume sport content online; exploring the Pay TV landscape and digital disruption faced by the industry where consumers are moving away from traditional broadcasters to online services; unpacking the motivations that are driving online sport consumption, also attending to possible demographic differences that may spur this viable market segments' underlying motives.

2.2 PAY TV MARKET IN SOUTH AFRICA

Prince and Greenstein (2017) advocate that television viewership in the US is the biggest use of leisure time. This also holds true in South Africa, with 14 million households owning a television set, of which 6.7 million are pay TV subscribers (Broadcast Research Council of South Africa, 2018). The Broadcast Research Council of South Africa (2017) also confirm that TV media reach enjoys the highest media consumption throughout the year at 91% - 99%.

ICASA (2018) depicts the evolution of South Africa's television history, with the introduction of the SABC, broadcasting a single analogue terrestrial TV channel in 1976, to one decade later in 1986 when the first pay TV service was launched by M-Net. Pay TV later diversified to a digital multi-channel offering when MultiChoice launched DStv, the second satellite DTH broadcaster outside the US. Etv came in operation in 1998 as an independent free to air analogue terrestrial platform. In 2005, ICASA provisioned more licenses for Pay TV providers to enter the market, with StarSat and OVHD operating as satellite DTH providers (ICASA, 2018).

Programming content in pay TV plays a pivotal role in competition among providers and being the provider of choice by consumers. Premium content such as Live Sport and newly released series and movies are the main reasons for consumer subscription (Weeds, 2016). Crawford (2015) describes how revenues are generated in the pay TV model that constitutes a blend of subscriber and advertiser payments. Shcherbakov (2016) reveals that pay TV providers have complete control over content bundle offerings and the price asked for in the market. It can be inferred that premium content can

therefore demand higher subscriber payments and higher advertising rates due to expected higher viewership ratings.

2.3 IMPORTANCE OF SPORT VIEWERS

Sports content globally has been noted as highly desirable to broadcasters. Sports spectators offer a level of loyalty as devotion and support of their favourite teams combined with the consumption characteristics of sports, requiring it to be viewed Live or on Linear. This makes it perishable in nature compared to most other content such as series and movies. This "live" attribute bears an advantage with traditional broadcasters, protecting against time shifting (fast forwarding) through programming. This content therefore continues to remain highly desirable for advertisers and sponsors (Fujak et al., 2017).

Popular sports events, tournaments and leagues such as the FIFA World Cup, Summer Olympics, the Rugby Championship and English Premier League, to name a few, are appealing for broadcasters due to their unique ability to draw unsurpassed media and spectator attention. Millions of sport enthusiasts pursue the coverage in a consistent and attentive manner, due to the emotional attachment to the represented countries, popular teams and notable athletes participating in these events (Gijsenberg, 2014).

It is worthwhile understanding the complexity of a sport fan's psyche in order better understand their consumption behaviors and resultant loyalty towards sport and or an athlete, and following any news about progress, performance and success. Sport consumer research has identified and measured a variety of motives, revealing a unique set of drivers that are based on experiences, socio-cultural rearing and personality of the spectator (Funk, Beaton, & Alexandris, 2012). Sport fulfills an individual's desire "for positive stress and psychological arousal, referred to as Eustress" (measured by Wann, 1995, as cited by Funk et al., 2012, p.358). Several other notable sport fans needs that are fulfilled through sport spectatorship, include facets of escapism, positive stress, entertainment, self-esteem enhancement, sense of belonging, positive social interaction, fan identification, sense of risk-taking, and significance of affiliation amongst others (Stavros, Meng, Westberg, & Farrelly, 2014). These factors have been studied extensively, using tested motive scales per each of the elements.

It can therefore be confidently stated that a sports fan is a valuable customer for a broadcaster, as their devotion is a powerful retention and engagement mechanism that is highly desirable for advertisers to reach a large captive audience. It has been proven that advertising during sports events are more effective from prolonged attention and from a psychological perspective. Commercial messages placed around the events are perceived as more interesting and important as well as evoking strong positive emotional appeal to the advertised brands that are associated with the values of the event. Positive emotions subsequently strengthen the advertised brand perception to potential customers, which can increase the likelihood of purchase, and higher brand recall - even with young male viewers who are known to be indisposed to traditional advertising and have a higher affinity for digital media (Gijsenberg, 2014).

Online media technologies are increasingly destabilising traditional media's dominant role as sports content provider, threatening the sustainability of conventional sport broadcasters (Corrigan, 2014). Seo and Green (2008) explain the appeal of accessing sports content online as opposed to conventional media sources such as television, radio and newspapers with respect to the convenience and ease of access to information. A major attraction, is that the web also enables fans to engage and interact with one another and allows for a sport fan to customize the genre, frequency and quantity of content served to them based on their personal desire, which traditional media that offer programmed content, are unable to do. This change in consumption behavior with spectators moving from traditional TV to online technologies will have a profound impact on the sport industry in the future, as is already evident. Commercial sports operators can expect a power shift, with the need to pursue new options to increase revenue as the traditional pay to view model may cease to exist in the foreseeable future (Funk et al., 2012)

2.4 DIGITAL MEDIA DISRUPTION

"Until fairly recently, South Africans viewed all these traditional TV services on linear channels on a TV set and were able to watch the audio-visual content only at the time of broadcast" (ICASA, 2018, p.41). Due to the proliferation of streaming services and media content that have become available over the Internet, South African consumers now have the widest range of access to electronic audio-visual services than ever before. Technological disruption as a result of Internet platform expansion has given rise to a plenitude of competing OTT services, which can broadly be categorized as (ICASA, 2018, p.57):

- "global OTT services (e.g. Netflix, APV, Google Play, Apple, YouTube, Facebook, Twitter and Snapchat);
- regional and local OTT services (e.g. iROKOtv, DEOD and Kwese Play);
- direct-to-consumer content providers (e.g. HBO and Disney); and
- domestic telcos' OTT services (offered by Cell C, Telkom, Vodacom and MTN)"

(ICASA, 2018, p.57).

Easy access to these services via the Internet, as a result of content digitisation, has led a global trend of increased television programming on computers and other mobile devices. As a result, the US industry reports that subscribers are dropping their TV services (cord-cutting) in favour of OTT services, including premium channels due to some form of access to this content online (Lee & Lee, 2015). This phenomenon is described by Cha (2013) as functional displacement, hypothesizing that when new media are introduced that have similar functions and advantages over an existing medium that serves the same purpose, the new medium will inevitably displace the old. As such, the Internet is a functional alternative to traditional TV, it also offers viewers curated content without time limitations, technical and cost benefits (Lee & Lee, 2015).

According to ICASA (2018), the South African TV industry has noted the same functional displacement trend, as a result of rapid implementation of broadband infrastructure and connected smart devices, whereby the online consumption of video content has increased. This has given rise to numerous OTT services offered locally that are supplied at comparably lower cost than the existing more traditional pay TV offerings in the market. Telecommunication data reports that 58% of data consumption in 2015 was of online video content. ICASA (2018) confirms this form of viewership preference by the youth, observing the shift of video content viewing via YouTube and pirated content, as well as engaging in simultaneous multi-screen content consumption. ICASA (2018) further explains the existing prevalence of this trend among young adults aged 16-24 years, who in 2015 were recorded as consuming less than 25% of audio visual content on TV. A raising concern, is that this percentage is likely to reduce further over time, which reveals the reality of changing viewership consumption preferences of future consumers in South Africa.

2.5 MOTIVATIONS ASSOCIATED WITH ONLINE SPORTS CONSUMPTION

The technological era has given rise to ubiquitous globalised Internet access, resulting in consumers devoting more time and resources to online consumption (ICASA, 2018).

As a result, it is critical to understand the consumption benefits sought by individuals who make use of online services as a substitute means of consumption. Understanding individuals' underlying motivations can explain consumer behaviours, which stem from their unmet needs.

Two dominant categories of motivations can be associated with online consumption in general, namely *utilitarian motivations* that "are related to functional, economic, rational, practical, or extrinsic benefits, as well as *hedonic motivations* that refer to the emotional or experiential aspects that contribute to making the shopping experience and eventual purchase pleasant" (Martinez-Lopez et al., 2014, p.189).

2.6 ACQUISITION UTILITY AND TRANSACTION UTILITY THEORY

2.6.1 Distinguishing The Utilities

Utility theory has developed as a concept over time, with its origins in moral philosophy. Authors such as Bentham introduced the idea of utilitarianism in 1789 as a measure of pleasure. Over time, economists advanced the concept, using it to explain an individual's behaviour, based on the premise that a consumer can consistently rank order his/ her choices depending upon personal preferences, which excludes the amount of pleasure derived from that choice (Witt, 2016). Utility theory is positivistic, based on observed behaviour, contrary to normative theory that dictates the manner in which the individual behaves.

Two types of utility have been proposed by Thaler (1985), namely *acquisition utility* and *transaction utility*. Acquisition utility represents the value of the goods or service compared to the cost of it, i.e. a strong financial focus. Transaction utility refers to the perceived advantages of the transaction, based on the difference between the price of a good or service and the reference price that the customer expects to pay for the product, which infers advantages over and above the financial benefits, such as joy, gratitude, and happiness. The implications of transaction utility are important in understanding the consumption behaviors by the value that a consumer has assigned to a product or service as everything a consumer pays for, does not only concern the acquisitional utility (financial gains).

Thaler (1985, as cited by Gupta and Kim, 2010, p.15) defines value as net benefits following an overall assessment of a product or service, based on a comparison of benefits (gains) and sacrifices (losses). Utility theories that attempt to explain customer value-driven behavior in the context of online consumption are important to reveal

customer-perceived value when they are faced with conditions that include risk and uncertainty. When thinking about online sport consumption, it is for example necessary to explore consumers' decision factors as a means to understand what consumers perceive as valuable (worth paying for) and what would shift the transaction utility at a point of purchase or consumption.

2.6.2 The Dimensions Of Utilitarian Utility

Martinez-Lopez et al. (2016) have explored the dimensions of utilitarian utility to enlighten the underlying motives for online consumption that could assist in uncovering the value and underlying benefits, as well as consumers' motivations to prefer certain services. The dimensions that were identified by the authors and that were relevant to this research investigation, are explained in the following section.

> **Desire for control:** This refers to an individual's need to have direct control over their immediate browsing environment, thus the degree to which one is able to manipulate the duration, frequency, type and sequence of content desired. It infers that some power over the consumption process is placed in the hands of consumer's. Individuals who perceive that they possess an increased level of control, are likely to be more attentive, enthusiastic and interested in the task at hand (e.g. the sports content viewed). Gaining greater levels of power also has the ability to assist in managing risk associated with online consumption. Therefore, when a sports viewer has higher degree of control over the sports viewing process, for example online viewing, it leads to positive outcomes (satisfaction, etc.) with the decision-making process.

> **Autonomy**: Autonomy refers to an individual's freedom of choice, and self-regulated behaviour according to one's personal interests, likes and dislikes in a specific context. This dimension explains an individual's desire for self-governance and choice, not being constrained by physical and spatial limitations (such as having to sit in a venue to watch a soccer match on television) and access to products and services (sports programmes) with greater ease and access. In the context of the study, being able to consume content from anywhere using alternative devices without the need to be in front of a TV set at a specific point in time for their needs to be fulfilled.

> **Convenience:** Convenience as a motivation for online consumption involves saving an individual time and energy, for example with online sport consumption

it refers to overcoming the physical barriers of product and service consumption. What is important is meeting the consumers' needs at the point in time at which they desire it, not having to wait until it is available from a provider, having the product or service available when it is convenient for the consumer, has become the impetus of modern day consumption. In essence, eliminating wasted time is what drives convenience as it reduces the barrier to consumption and consuming online has facilitated this.

Assortment: A consumer's motivation to consume online is greatly motivated by the wider selection available to them in a single place: this variety of options increases a consumer's utility as the number of alternatives is exponential with the same amount of effort made to access fewer consumption options. The extent of assortment of goods and services can also be very specific, based on the (sports) interests of the consumer to provide greater relevance and increased satisfaction with the options that can be accessed.

Economic utility: This dimension emphasizes the financial gains derived from online consumption, in aid of getting the best value to satisfy a need. Having the vast array of alternatives can save a consumer money, thus increasing the value gained. This enhances consumer satisfaction and creates a positive sense of achievement post consumption.

Availability of information: The Internet is a vast source of information, and the availability of information that is provided by it holds multiple advantages for consumers. Being equipped with comparative and alternative sources of information, not only improves consumer decision making, but having relevant information increases transaction utility, provides cost savings and the potential to conclude satisfactory purchase or consumption process.

Customization: This dimension describes a consumer's need to personalize a consumption process, in a manner that meets the individual's unique needs and preferences. Online consumption can be highly customized through individual online choices, searches, while search history and opinions can be tailored so that only the relevant options that are perceived as valuable are served to/ accessed by the customer. The possibilities for personalization therefore enable providers to co-create options that are highly relevant and would create greater efficiency by eliminating wasteful material (programmes) to an audience who are not interested and do not desire them. With traditional sport channels that are

viewed on TV, audiences are obliged to watch specific programme content that is designed by the service providers.

Ease of payment: online consumers have a variety of payment alternatives to choose from, and exceptional value is derived from the freedom to purchase products and services notwithstanding geographical and currency boundaries. Coupled with this, is the ability to only pay for what the consumer needs as the Internet allows a consumer to exercise customized options. Issues that may be intimidating, however, is online security and level of trust with unverified websites and vendors that could halt the individual who is attentive to a product or service causing a barrier to conversion.

Some of the dimensions referred to in the study of Martinez-Lopez et al. (2016) were excluded as they were not relevant to the topic of online sport consumption, for example a dimension dealing with home environment and the comfort of the purchases being made in a private dwelling as opposed to the physical shopping environment. This was deemed irrelevant to the study as the matter of "convenience" was as discussed earlier. Another dimension that was excluded due to non-relevance, is "lack of sociability", which is very specific to the desire to purchase goods and services without having to interact with shop assistants or other customers in a store.

2.7 USES AND GRATIFICATION THEORY

2.7.1 The Theory Defined

Understanding why individuals prefer certain media to fulfill their specific needs to achieve eventual gratification is an approach based on the Uses and Gratifications Theory (Whiting & Williams, 2013). Ko et al. (2005) explain the theory in terms of an understanding of consumers' motivations for Internet usage as well as the related consequences, for instance consumers' "attitude toward the site, attitude toward the brand, and purchase intention" (Ko et al., 2005, p.1). The theory has developed over time and reveal how users deliberately choose media to satisfy their needs. The authors (Ko et al., 2005) subsequently developed a scale that distinguishes consumers' motivations for Internet usage, in terms of specific dimensions as discussed in the following section.

2.7.2 Dimensions Of The Theory

The following dimensions are distinguished by Ko et al. (2005) to explicate the Uses and Gratifications Theory of Whiting and Williams (2013):

> **Information:** Information seeking encompasses the motivation to exploit the Internet in search of information for self-education. The information search could be for various reasons, including general surveillance, in other words, browsing or visiting sites for specific information and seeking information that might also serve as entertainment or enjoyment, i.e. so-called info-tainment. With reference to sport content online, this would mean that the consumer can browse various sites to find a programme that he/ she would like to view at a particular point in time rather than to be restricted to certain scheduled programmes television.
>
> **Convenience utility:** Using the Internet as a media source is convenient by virtue of the possibility to perform a number of functions (programme searches) using a single point of access to get whatever a person wants, with less effort, without being bound by place or time. Television sports viewers may be limited by the geographic area and location, and even be restricted to certain channels depending on their viewer status.
>
> **Entertainment:** Using the Internet van provide means of enjoyment, escapism and fun (hedonic motives). It could also relieve boredom, as a means to occupy one's time. This could aid in day-to-day stress relief. The application in terms of this study, is that when a consumer is unable to view sport content due to lack of access to relevant TV channels, the individual may feel isolated, bored and even depressed.
>
> **Social interaction:** This dimension refers to the usage of the Internet to interact and facilitate communicating with others. One of the scale items, "keep up with what is going on" indicates that easier access to sport content online is advantageous in that it enables more people to be informed about a topic that attracts much interest in one's social environment.

2.8 GENERATIONAL COHORT THEORY (GCT)

Because this study specifically focussed on the behaviour of the Millennial age cohort, the Generational Cohort Theory was consulted.

2.8.1 GHT Explicated

Age is an important segmentation variable that applies to Millennials, who form a vital age-related target market segment (Debevec, Schewe, Madden, & Diamond, 2013). Marketers often use age as a common segmentation tool, with the aim of grouping customers into large heterogeneous groups and targeting products and services that are likely to appeal to them (Parment, 2013).The Generational Cohort Theory, as first proposed in 1977 by Inglehart (as cited by Lissitsa & Kol, 2016) presents a way to divide the population into segments by virtue of years of birth, averaging in durations that range between 20 to 25 consecutive years. This is particularly useful when using a mass marketing approach, as common characteristics are distinguished of sizeable market segments.

Duh and Struwig (2015) explain that generational cohorts (such as the Millennials that this study was interested in) represent a set of individuals who have jointly experienced external events during their formative years (for example the South African Millennials who experienced the reality of a new socio-political dispensation that was introduced in 1994). Therefore, they collectively, as a particular age group, share similarity in value systems, beliefs, attitudes and preferences. It is suggested that a cohort's long-term core values (attitudes, preferences, and behaviours) are shaped and are not expected to change post a defining moment through some shared experiences. This historical event (such as the new socio-political dispensation that was introduced in 1994 in SA), usually occurs during a group's "coming of age years" and creates connections that bind members of the cohort together (Debevec et al., 2013).

Consideration must be given to how each generation behaves in terms of information search, activity preference, and perception of leisure activity as each generation possesses unique characteristics that are shaped by external influences during their formative years, thus leading to differences in behavioural and consumption patterns as compared to other generations (Kruger & Saayman, 2015).

2.8.2 The Millennial Age Cohort

Generation Y (Millennials) include the children of original baby boomers and although the exact time span is defined somewhat differently by different authors, this generational cohort included all born after 1980, and who are currently younger than 35 years of age. Millennials have grown up in an age of significant and rapid change, many of which in dual income- and diverse households, having an increased social awareness, having technology present at home and school, possessing a meaningful respect for (cultural and social) diversity as well as equal opportunities. Having grown up in the age of the Internet, Millennials are highly proficient in the use of technology and have a high regard for technology integration in their lives: a proficiency and mind-set that clearly differentiate them from previous generations (Kruger & Saayman, 2015).

Millennials enjoy working collaboratively, are ambitious and results driven, often holding a global perspective, with a deep respect for institutions. Research have shown that they are very interested in travel, leisure, recreation, and socialising: over 70% of their income may be spent on these interests (Debevec et al., 2013). Being value and convenience orientated, Millennials are often pragmatic: being brand conscious and preferring brands with a core identify based on core values. Their friends' opinions often influence their views. Thus, word of mouth is often the best marketing method to target this group. Advertising that is grounded in real life situations, incorporates humour and emotion, with a focus on lifestyle and fun, will be more successful among them (Kruger & Saayman, 2015). Compared to prior generations, Millennials are exerting their power and influence as has not been seen before. Due to their diversity, size, and influence on culture and brands the world has no option other than to take notice of them (Fromm & Garton, 2013). This is a complex challenge to marketers, because typically, Millennials are not very loyal and would easily switch brands and stores, they place a strong emphasis on emotion, have high expectations, and strongly demand satisfaction (Bilgihan, 2016).

Millennials are increasingly important for products, brands and services in the future. In the US, this cohort represents the largest consumer market: three times the size of their predecessors, generation X (Valentine & Powers, 2013). In South Africa, this generation has also been identified as a powerful and sizeable consumer segment. With the changing economic circumstance, their consumer culture is driven out of technological innovation, including pressure by social media to keep up with the lifestyles they aspire to. They are driven towards successful, and high earning careers to acquire higher status levels (Duh & Struwig, 2015). Millennials will continue to assimilate themselves into the workforce over the coming decades, and as a result of their increased purchasing power,

industries have to gear themselves to target and satisfy this significant market (Woldeamanuel & Nguyen, 2018).

2.8.3 South African Millennials

Members of Generation Y or Millennials are of particular interest for this research conducted in a South African context, who are described by Duh and Struwig (2015) as individuals born between 1980 and 1994. Being the first cohort to enjoy the freedoms and opportunity of a post-apartheid society, this cohort share defining moments that have shaped this generation's values, attitudes and preferences. Privileges that South African Millennials are enjoying from their birth, are racially mixed schools, access to higher education in any field, opportunities for wealth creation and freedom of movement within our boarders unlike their parents (Generation X).

The South African youth, aged 15 to 34 years (StatsSA, 2016) constitute approximately 36.2% of the country's population, thus approximately 20.4 million individuals. Gauteng is the most populous province in the country, with a racial demographic split representative of the country, with black Africans accounting for almost 80% of the population. The gender split is 51% male and 49% female (StatsSA, 2011). As a result, the targeted population of this study was limited to all Millennials in Gauteng, targeting individuals currently younger than 35 years of age (Lantos, 2014).

The majority of generational focused research has been conducted in developed countries, which is not completely applicable in the South African context. For a considerable period of time, South African society was fragmented politically with devastating social consequences for some population groups, and advantages to others. There is a definite need to employ further research on a society strongly influenced by division, historical and political events in order to establish significant differences in consumers' mindsets (Duh & Struwig, 2015).

South African Millennials are more exposed to external influences and expose themselves to more according to Youth Report (2018). This can be attributed to 93% of them having a social media account, noting that social media is addictive and indispensable to daily life (Egan, Lappeman, Jorgensen, Tembo, & Ferreira, 2018). As a result of social media influences many Millennials are under pressure to keep up with trends and portray a particular persona, in order to remain relevant in various circles. Pressure is felt from their family, to succeed and ultimately be an additional provider to

their parents and siblings. Their community adds additional pressure to uphold their local heritage but due to their access to information and global influence, they experience cultural dissonance and tension between the traditional local heritage and desire to adapt to a more global millennial neutral mindset. Peers assert pressure in a race to have an image and persona that enables them to be in the know, stand out, be unique and perceived as living the best life (Egan et al., 2018).

Millennials are highly driven by peer pressure in order to remain relevant, many are only on social media to avoid having FOMO (Egan et al., 2018), the phenomenon of the fear of missing out. FOMO is the "pervasive apprehension that others might be having rewarding experiences from which one is absent" (Przybylski, Murayama, DeHaan, & Gladwell, 2013, p.1841). FOMO can be characterized as a unique trait of Millennial sports consumption behavior. It represents the act of following matches online or through social media platforms simply to avoid having FOMO and resultant isolation due to the absence of information that friends have that they do not.

2.9   SOUTH AFRICAN MILLENNIALS' ONLINE SPORTS CONSUMPTION BEHAVIOUR

South African Millennials' technological aptitude is very similar to that of their counterparts in the developed world: Lissitsa and Kol (2016) describe how major parts of the daily lives of Millennials are mediated by digital technologies, simply because "they are digital natives who have never known any other way of life" (Lissitsa & Kol, 2016). Valentine and Powers (2013) as well as Cha (2013) describe the Internet as the medium of choice for information and entertainment for this cohort, highlighting the speed at which this they are thereby able to discover new and emerging trends. To the contrary, television and printed media were the media of the era for their parents (Generation X), and their access to new information was much slower. Millennials are considered digital natives, having experienced the Internet age for most of their lives, during which the integration of technology is seen as the norm. With their high proficiency and the high rate of adoption of technology, a strong relationship is formed with it, that distinguishes them from a previous generation in the sense of how things are done, and how information is accessed (Cha, 2013).

Due to their proficiency with technology, Millennials today have the greatest access to free, near live sport content than ever before. The proliferation of an increasingly digitised media ecosystem has liberated viewing audiences to access content from a plethora of

online modes, streaming Over the Top (OTT) sources, causing a progressive migration away from traditional satellite and other Direct to Home (DTH) television broadcast providers, which is referred to as Cord Cutting (Fuduric et al., 2018). Fuduric et al. (2018) classify consumers' television viewing behaviour into four categories:

- "Cord Loyalists, who are older consumers who remain loyal to their TV subscription
- Cord couplers, who subscribe to pay TV as well as OTT services
- Cord shavers, who decide to downgrade their pay TV- whilst also using OTT services
- Cord cutters, the predominantly younger tech-savvy viewers, who have ended their use of pay TV and only use OTT services
- Cord Nevers, who have never made use of pay TV services and exclusively use OTT"

(Fuduric et al., 2018, p.86).

The majority of cord cutters are younger, tech savvy consumers, thus Millennials, who ceased their use of pay TV in favour of OTT content as the Internet and other online sources provide an adequate substitute for their viewing needs (Fuduric et al., 2018). Millennials expect to have access to live sports as an event happens, this need for instant gratification has driven the proliferation of sports broadcast piracy, via internet streaming. Sport viewing adoption rates far exceeds other viewing entertainment as it has the ability to transcend social, cultural and linguistic barriers (Wong, 2016).

This younger consumer segment is gaining importance in the market place by virtue of their increasing purchasing power and natural affinity to digital media consumption. Being the first high-tech generation (Lissitsa & Kol, 2016), they are digital citizens, who possess multi-tasking abilities facilitated by technology, and mostly, their daily activity centers around digital social interactions and media consumption that are geographic and time boundless. This behaviour has recently been confirmed by Prince and Greenstein (2017), although they caution that the content offering remains a mediating factor in the customer's choice.

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Black Twitter is an example of content that drives content, where personal accounts conversing whilst a TV show is screening can be more popular than the TV shows. That means the 'social' is actually becoming your content (Egan et al, 2018).

2.10 SUMMARY

A theoretical overview of important constructs relating to the investigation are provided in this chapter. It commences with the introduction of pay TV in South Africa, explaining how the sports viewing of sports enthusiasts have changed since the introduction of online alternatives. The different online options are not only more affordable, but also more accessible to young tech savvy consumers. Using the *Acquisition- and Transaction Utility Theory* of Thaler (1985), it is explained that online sport consumption not only holds acquisitional value (being exceptional value for money), but that it also provides transactional value, based on the pleasure derived from sports viewing by means of novel technologies.   Literature pertaining to online sport consumption is also framed within the *Uses and Gratification Theory* (Ko et al., 2005), that is explained in terms of four dimensions, namely that online *information searches* for entertainment or enjoyment (so-called info-tainment) is fast and less restrictive than conventional TV sports channels; contributing to *convenience utility* by virtue of the possibility to perform a number of programme searches using a single point of access with less effort, without being bound by place or time; that using online sources can enhance *hedonic outcome*s such as pleasure and relief of boredom; as well as serving as a t*ool to interact socially*. The study's focus on the Millennial age cohort is explained in terms of the *Generational Cohort Theory* (Inglehart, 1977, as cited by Lissitsa & Kol, 2016), highlighting the typical characteristics of Millennials, the unique opportunities that South African Millennials have experienced in their lives compared to the previous generations and how that is influencing their sport consumption behaviour.

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CHAPTER 3

RESEARCH OBJECTIVES

CHAPTER 3: RESEARCH OBJECTIVES

3.1 INTRODUCTION

The research aims as well as the objectives that stemmed from the literature review and identifies the important constructs that framed the span of the investigation, are outlined in the following chapter. The study sought to investigate and gain empirical evidence of the sports consumption behaviour of the emergent Millennial consumer in South Africa, with specific focus on the different sources (technologies) used to view sports content online, the frequency of their sports consumption, as well as underlying motivations to use alternative sources/ media to access sports content, which may aid traditional service providers to better serve them in the future considering that they represent a viable market segment with unique behavioural traits (Duh & Struwig, 2015).

Evidence from the literature review confirms that Millennials are inclined to rather consume sports content online than to depend on fairly expensive pay TV channels to satisfy their needs as sports enthusiasts (ICASA, 2018). Consequently, it is not surprising that this generational cohort that is also described as tech savvy, multi-taskers who have had considerable exposure due to their ability to access information online by means of multiple devices (Lee & Lee, 2015), are engaging in cord-cutting (Fuduric et al., 2018). However, there is a void of conclusive empirical evidence in a South African context of the motivational factors that coherently contribute to Millennials' affinity for online sport consumption. While literature mentions an array reasons for cord cutting and online sport consumption, it is unclear what benefits sports enthusiasts seek and how traditional sports content providers could adapt their offerings to satisfy Millennials' unmet needs.

3.2 RESEARCH QUESTION

The research question that emerged after a review of extant literature, is:

Which online media are popular among Millennials for sports viewing and which motivational factors are predominant in their tendency to switch to online media for sports consumption rather than supporting the traditional TV channels that all have become accustomed to since their inception in the 1970's.

3.3 AIM OF THE STUDY

Based on the research question, the study aimed to investigate and provide empirical evidence of the online sports consumption habits of a specific demographic group in South Africa, namely the Millennials, as a viable future market segment, with specific attention to their underlying motivations for consuming sport content online. The aim was to explain the relationship between the independent (utilitarian motivations) and dependent variables (consumption of online sport content) to account for the forces that cause certain behavioural outcomes, to enable traditional service providers to better serve consumers' sport viewing needs in the future.

3.3 RESEARCH OBJECTIVES

To capture the aim of the study, the objectives listed below were formulated:

1. To investigate and describe Millennials' online sport consumption in terms of:
      1.1 frequency of sports viewership, and
      1.2 duration of sports viewership
      1.3 media used.
2. To investigate and describe Millennials' motivation to consume sport content online:
      2.1 discriminating the strength of different motivational factors
      2.2 discriminating significant demographic differences (gender, age, household income and population group differences) in motivation within the Millennial age cohort.
3. To compare Millennials' motivation to consume sport content online in terms of:
      3.1 frequency of sports viewership, and
      3.2 duration of sports viewership.

The research design and methodology followed to execute the investigation is presented in Chapter 4.

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CHAPTER 4

RESEARCH DESIGN AND METHODOLOGY

CHAPTER 4: RESEARCH DESIGN AND METHODOLOGY

4.1 INTRODUCTION

The following chapter outlines and details the research design and methodology to explain how the study was executed. Commencing with the research philosophy, details concerning every step of the research process, including measures to eliminate error and to ensure ethical conduct are provided.

The of the study was to define the relationship between the independent (utilitarian motivations) and dependent variables (consumption of online sport content) to account for the forces that cause certain behavioural outcomes. This explorative, descriptive and correlational study is directed by research questions derived from existing theory that was refined in terms of specific research objectives (Cooper & Schindler, 2006). The quantifiable data that was gathered, was analysed statistically to address the research question that was sub divided into specific objectives.

The objectives stated below were formulated to address the aim of the study:

1. To investigate and describe Millennials' online sport consumption in terms of:
> 1.1 frequency of sports viewership, and
> 1.2 duration of sports viewership
> 1.3 media used.
2. To investigate and describe Millennials' motivation to consume sport content online:
> 2.1 discriminating the strength of different motivational factors
> 2.2 discriminating significant demographic differences (gender, age, household income and population group differences) in motivation within the Millennial age cohort.
3. To compare Millennials' motivation to consume sport content online in terms of:
> 3.1 frequency of sports viewership, and
> 3.2 duration of sports viewership.

4.2 RESEARCH PHILOSOPHY

A positivistic perspective was taken as it allows opportunity to gather quantifiable evidence, "to establish causal laws that enable the prediction and explanation of marketing phenomena" (Malhotra & Birks, 2007, p.155). This measure was considered appropriate as the study aimed to investigate and describe quantitatively, the different

media used by Millennials to consume sport, as well as their motivations to consume sport content online (distinguishing possible demographic differences within the age cohort), using established scales that were slightly adapted for the particular context.

4.3 RESEARCH DESIGN

This quantitative study followed a deductive approach, thus using theory from existing literature to formulate the research problem, to deduce the research aim and relevant research objectives (Saunders et al., 2009). A mono method, quantitative survey was applied to conduct the investigation. The survey was only administered once to this sample, making the research cross sectional in design, of which the objective was to obtain information related to consumers' online usage motivations at a particular point in time in a specific context (Creswell, 2014).

A survey strategy was used to collect data as it is a reliable method of collecting data that is not directly observed (Malhotra et. al., 2007). In addition, the type of data gathered using this strategy can be employed to investigate the causal relationship amongst variables (Saunders et al., 2009) which aligns to the objective of the quantitative study. Making use of a survey strategy has a distinct benefit consistent with the positivist approach, to study a unit of respondents in a uniform and consistent manner, without the researcher's influence on the respondents' interpretation of the questionnaire. This enhances valid and reliable findings (Malhotra et al., 2007). The survey was directed by a research question derived from existing theory that was refined in terms of specific research objectives (Cooper & Schindler, 2006).

There are, however, disadvantages associated with the quantitative method and survey technique, being the limited level of insight and detail that can be extracted by means of the pre-designed questions that were derived from literature, i.e. findings cannot be explained (Zikmund, Babin, Carr, & Griffin, 2013). A qualitative study on the other hand, has the advantage of providing clarity and opportunity to explain responses which is not possible with a quantitative survey.

4.4 RESEARCH METHODOLOGY

This survey was designed to be disseminated amongst the Gauteng Millennial population – particularly those who have consumed sport content online during the past 12 months, to ensure relevance. The measuring instrument was a structured online questionnaire,

as it seemed the most appropriate data gathering tool given the vast spread of the population that has access to the Internet. It was furthermore the most convenient and practical way to reach the population given the time and financial restrictions, to derive a useful sample size (Creswell, 2014).

4.4.1 Population

A population, in the research context, is referred to as a complete set of individuals (for example Gauteng Millennials), who universally have a similar set of characteristics (for example a specific age cohort such as Millennials, in specific geographic location), that a researcher is interested in (in this instance motivation to consume sport content online), that can be investigated to draw inferences regarding the population (Saunders et al., 2009; Cooper et al., 2006).

The population targeted for the study, was Millennials, residing in Gauteng. This generational cohort includes persons born between 1984 and 1998, thus younger than 35 years of age when the study was conducted (Lantos, 2014). Census data indicate that this population constitutes approximately 3.7 million individuals (StatsSA, 2011), with a cross section of all races, specifically split 76% Black; 13% White; 4% Indian and Asian; and 3% Coloured.

4.4.2 Unit Of Analysis

The sample of analysis is the subjects or groups being studied, defining who or what should produce the data and the collection value (Zikmund et al., 2013). The sample of analysis for the purpose of this study and consistent with sports studies in the South African context, are Millennials with a gender split of 70% Male and 30% Female (Kantar TNS, 2017). This equates to 1.4 million males and 500 thousand females, born between 1984 and 1998, currently between the ages of 20 to 34, who reside in Gauteng (StatsSA, 2011).

4.4.3 Sampling Method And Sample Size

A sampling frame could not be developed from the target population, as a complete list that includes everyone who qualifies to participate in the study, is not documented nor available. The study therefore had to used non-probability sampling, as "the probability

of each case being selected from the total population is not known" (Saunders et al., 2009, p.213). The techniques applied to select the sample were therefore based on the judgment of the researcher (Saunders et. al., 2009). It is common for market researchers to make use of non-probability sampling methods when having financial- and time limitations (Phillips, Rivers & Moy, 2015). Due to the geographical span of Gauteng, a combination of purposive, self-selected and snowball sampling methods (Creswell, 2014) were used to target and include the widest reach of valid respondents.

4.4.3.1 Purposive sampling

Purposive sampling requires the researcher's judgment to choose the sample from the population, based on the researcher's expertise on which participants be best suited to take part in the study (Malhotra et al., 2007). This study had a very specific target population in mind, specifically those residing in Gauteng, being within the Millennial age cohort, having an interest in sport, having access to the Internet and having consumed sport content in the past 12 months. Respondents had to abide with all the requirements mentioned for inclusion in the study to ensure that the data would be valid for analysis.

4.4.3.2 Self-selected sampling

Self-selected sampling involves sample members identifying themselves as willing to participate in the research (Saunders et al., 2009). This method was chosen for the study due to the way the questionnaire would be disseminated on social media. Prospective respondents would identify themselves as individuals who qualify to be included the study, when targeted on Facebook and Twitter. A promoted link was provided on the personal accounts of popular sport personalities who agreed to assist with the recruitment process. The post was geographically blocked to Gauteng. The willing sport personalities posted the link that requested Gauteng Millennials to participate in the study and to complete the questionnaire.

4.4.3.3 Snowball sampling

Snowball sampling refers to a process where a respondent who has completed the questionnaire, identifies additional respondents and invite them to do the same (Zikmund et al., 2013). This is a useful technique to attain a higher number of respondents, specifically when individuals who have already completed the survey, or are willing to

assist, pass on the link to access the questionnaire to people in their social circles that possess the desired characteristics. Snowball sampling was appropriate for this study because sports fans generally share a large social circle, based on common interests.

4.4.4 Sample Size

Determining an appropriate sample size requires defining an acceptable confidence level, the extent of acceptable error and the heterogeneity of the population (Zikmund et al., 2013). The sample size was calculated using the following function (Wegner, 2016):

$$n = z^2 \frac{p(1-p)}{e^2}$$

Under a 95% confidence level, with a 5% margin of error, from a total population size of 1,896,261, the sample size required, was 384 valid responses. The researcher's aim was to try to attain 500 responses, to have a better chance of attracting the gender split of 70% male and 30% female respondents, born between 1984 and 1998, including a diverse population range.

4.4.5 Measurement Instrument

4.4.5.1 Type and construction of the questionnaire

Data was collected through a self-administered online questionnaire. The benefit of an electronic questionnaire, is that it allowed the researcher to share the link, and for respondents to forward it to others. Phillips, Rivers and Moy (2015) explain that in modern times, the Internet-age context has increased the popularity of online questionnaire usage and that it has become the most prevalent method to pursue non-probability sampling.

The questionnaire comprised of three sections. When a respondent clicked on the link, it began with a preamble detailing the intent of the research and presented a consent form. The two sections that followed, included questions related to demographic information and the respondent's extent of use of sport content consumption online. Most importantly, a definition of sport content and the explanation of the breadth of online media were detailed to increase respondents' understanding of the context being studied and to provide clarity on the extent of possible online media that are available to consume sport content. These two sections acted as the qualifying criteria for valid respondents

(limited to Gauteng Millennials who consume sport content). Section 3 of the questionnaire was prepared from a basis of tested multi-item scales derived from literature. Five of the eight dimensions relating to "Utilitarian Motivation" designed by Martinez-Lopez, Pla-Garcia, Gazquez-Abad and Rodriguez-Ardura (2014), while two of the four dimensions of the "Uses and Gratification" theory by Ko, Cho and Roberts (2005) were adapted for incorporation to measure a consumer's online consumption motivations (Annexure 1 details the original dimensions and indicates the final adapted dimensions and elements for clarification}.

TABLE 4.1: QUESTIONNAIRE SUMMARY

Section	Information Tested	Number of Questions	Completion time
Introduction/ Cover screen	Preamble and consent form	1	10 seconds
1	Demographic information	6	30 seconds
2	Sport content consumption behaviour	2	80 seconds
3	Consumer motivation for online consumption	36	5 – 7 minutes

Malhotra (2007) describes the various scaling techniques, indicating that comparative scales are those where there is a direct comparison of stimulus objects with one another, while with non-comparative scales, stimulus objects are scaled independent of one another. The Likert-type scale is a non-comparative measurement scale, typically consisting of five response categories, ranging from '5 = Strongly agree', to '1 = Strongly disagree'. This study adopted a 5-point Likert-type "Agreement" scale as a measurement tool for Section 3, ranging from 5 = Strongly agree, to 1 = Strongly disagree. Preference for a five-increment rather than the original 7-point scale used by the authors of the original scales that were adapted for this study, was based on an attempt to simplify respondents' choices when completing the survey using mobile devices.

TABLE 4.2: INTERPRETATION OF 5-POINT LIKERT-TYPE SCALE

Numerical value	Interpretation
5	Strongly agree
4	Agree
3	Neutral
2	Disagree
1	Strongly Disagree

4.4.5.2 Explication of the content of the measurement scales

Although established measurement scales were used for inclusion in Section 3 of the questionnaire, care had to be taken to restrict the length of the questionnaire to prevent boredom and to increase reliability. Also, the wording had to be adapted slightly to reflect the context of the investigation. The final scale (explained in Sections 4.4.5.2.1 and 4.5.2.2) included seven constructs related to utility motivations, with a total of thirty-five items. The items were shuffled before inclusion in the questionnaire so that respondents could not relate items pertaining to a particular construct to another. Figure 4.1 showcases Section 3 of the final questionnaire. Annexure 2 shows how the questions were reordered using colour coding for ease of reference

4.4.5.2.1 Consumers' utilitarian motivations

Consumers' utilitarian motivations in online consumption was modelled by Martinez-Lopez et al. (2014). The original scale consists of eleven dimensions derived from literature and underwent three phases to fully delimit the dimensional structure. First correlation tests between construct variables were conducted by the authors to refine the scale to ten dimensions. Secondly, a qualitative investigation reduced the dimensions to nine, after which a final quantitative analysis resulted in the final eight dimensions with 36 items. This include: desire for control (3 items), convenience (6 items), assortment (9 items), availability of information (7 items), customisation (4 items), absence of social interaction (2 items), payment services (2 items) and anonymity (3 items). When considering these dimensions for the purpose of this study, adaptions and exclusions were made to some of the dimensions as dictated in Annexure 1. In summary:

- *An additional element was added to "desire for control" dimension that relates to 24/7 access to the content consumers desire, which makes them feel in control of their consumption process.*
- *The "assortment" dimension was renamed "variety of content" given the study's context. Some elements under the "convenience", "variety of content" and "availability of information" dimensions were removed, due to duplication and/ or they were deemed irrelevant in the context of the study.*
- *The dimension "payment services"* was removed as the elements were covered in other dimensions. This also helped to reduce the length of the questionnaire.

- *The "Absence of social interaction" and "Anonymity" dimensions were also removed as the elements are not consistent with literature in the context of this study, which also helped to reduce the length of the questionnaire.*

The final construction of this scale is presented in Table 4.3.

TABLE 4.3: UTILITARIAN MOTIVATION SCALE ITEMS WITH ADAPTATIONS

Dimension	Original items in literature	Final items adapted for this study
Desire for control	3	4
Convenience	6	5
Assortment	9	6
Availability of information	7	6
Customisation	4	5
Payment Services	2	Omitted
Absence of social interaction	2	Omitted
Anonymity	3	Omitted

4.4.5.2.2 Uses and Gratification Theory

The study of Ko et al. (2005) investigates consumers' motivations for using the Internet, which is based on the Uses and ratification Theory that explain psychological and behavioural dimensions related to mediated communication. The basis of this scale was to measure "causal relations among motivations for using the Internet and major interactive advertising variables" (Ko et al., 2005, p.57) concluding that the strength of the four motivational dimensions influences consumers' inclination of the website, brand and purchase consideration. The final four motivational dimensions of the authors' 15 item scale include: information motivation (3 items), convenience motivation (4 items), entertainment motivation (4 items) and social interaction motivation (5 items). Social interaction motivation, comprises of two sub-dimensions including *human-message interaction* and *human-human interaction.* Only *human-human interaction* items (4 items) were retained for the study.

For the purpose of this study, the information and convenience motivations were omitted as they had already been adequately covered in the Utilitarian Motivations Scale. Selected elements from *entertainment motivation* and *social interaction motivati*on dimensions were included in the questionnaire as the utilitarian motivations of online consumption that were included already, did not cover these aspects. Martinez-Lopez et al. (2014) indicated this as a limitation of the study, and therefore effort was made by the researcher to address this limitation. The *hedonic motivations* of online consumption,

given the prevalence of social media, cannot be ignored, especially in the context of this study that focused on Millennials, who are social media natives. Figure 4.1 represents the instructions in the questionnaire.

FIGURE 4.1: FINAL QUESTIONNAIRE

Section 3

Online Consumer Motivation

Please answer the following questions indicating your motivation to consume sport content online with numbers representing:

1= Strongly Disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly Agree

9.1 Consuming sport content online fits my schedule
9.2 I like to feel I have control over the medium/ device I want to consume sport content on.
9.3 Online, I can match my sports content consumption according to my needs
9.4 Online sport content sources provide me with the kind of decision-making information that I did not have access to before.

10.1 I save a lot by consuming sport content online
10.2 Thanks to the many sources of sport content online, I have quick and easy access to the information I want, which makes me feel like an empowered online consumer
10.3 I consume sport content online because I find it enjoyable
10.4 Watching sport content online allows me to watch whenever I want

11.1 I watch sport content online because there I can get what I want
11.2 By using affordable or free alternatives online I feel in control of my sport content consumption
11.3 By customizing my online sports consumption, I feel unique
11.4 I consume sport content online to participate in fan discussions
11.5 Consuming sport content online is good value for money
11.6 *I consume sport content online,* so I can share my views on the site

12.1 What I value by consuming sport online is the availability of information from the sports commentators as well as other sport fans.
12.2 Using the Internet to watch or consume sport content is convenient for me
12.3 *I consume sport content online* to engage with people who share my sport interests
12.4 I consume sport online as I just like to surf the Internet
12.5 I consume sport online to pass the time

13.1 *I consume sport content online* to express myself freely
13.2 Online, I have the option to consume only the sport content and team that interest me
13.3 The Internet provides me with a broad selection of sport content I would not otherwise have access to
13.4 Having 24/7 access to sport content online, gives me a sense of control of my consumption process
13.5 With online sports consumption, I am able to control my frequency of consumption

14.1 Online I can choose or customize only the sport and teams that interest me
14.2 *I consume sport content online* to keep up with what's going on in my favorite sport
14.3 Only consuming or being served the sport content I am interested in makes me feel in control of my viewing experience
14.4 I watch sport content online because it provides me with quick and easy access to sports content I do not have access to on conventional TV

15.1 *I consume sport content online,* so I can be in touch with other people's opinions
15.2 Watching or consuming sport content online makes my life easier
15.3 Financially, the availability of different media sources is beneficial to me in terms of my sport content consumption
15.4 I consume sport content online because I find it entertaining
15.5 Watching or consuming sport content online saves me a lot of time
15.6 *I consume sport content online,* so I can follow my favourite clubs and athletes
15.7 I watch sport content online because of the variety of sports content that are available in formats I like

4.5 DATA COLLECTION

Data was gathered using a self-administered survey. The link to the survey was placed on social media platforms including Facebook and Twitter per the accounts of popular sport personalities, including Carol Tshabalala, Motshidisi Mohono, Clinton van den Berg and Lindiwe Dube who agreed to assist with the endeavour. These sport personalities have a combined following of just under 1 million followers across all age groups. Making use of popular sport personalities, made it possible for the survey to reach an audience that is interested in sport and that is active online, increasing the reliability and validity of respondents. Followers were prompted by the personality to participate in the study. Once an interested person clicked on the link, he/ she was redirected to an online survey platform namely SurveyMonkey, where an individual first had to accept being a willing and voluntary participant, where after the questionnaire could be accessed and completed. Data collection began on the 13th of August and closed on the 1st of September 2018, producing a total of 252 responses. Due to financial and time restrictions the goal of 500 responses was not achieved. The situation was discussed with a qualified statistician, who concurred that the data set could be used to proceed with the anticipated analyses.

4.6 DATA ANALYSIS

The data that was collected from the online platform, was exported to an unformatted MS Excel document. A structured approach was followed to analyse the data (Wegner, 2016). Data validity was established first, that involved removing surveys where respondents did not meet the qualifying criteria in section 1 (age, geographic location; online sports consumption); incomplete surveys; questionable surveys showing the same Likert-scale rating for every answer, indicating that answers may have been allocated haphazardly for example.

Data analyses were done in the following order. Descriptive statistics such as frequencies, percentages, means, standard deviations, were performed first on the demographic information, to inter alia describe the sample and to subsequently identify sub sets of the sample for further analysis. For section 3, Exploratory Factor Analysis (EFA) was done to explore the different factors/ dimensions (utility values) for the purpose of this study. This includes the calculation of Cronbach's Alpha (aiming for values >0.7); percentage of variance in the data (anticipating total variance explained >60%); means, standard deviations. ANOVA and t-tests were used to observe possible significant demographic differences for each dimension (Kent, 2015).

For section 3, correlational analysis was used to analyse the data, i.e. to determine the strength of linear associations between two numeric variables, one independent and the other dependent as described above. Specifically, a Pearson Correlation coefficient (Wegner, 2016) was adopted to test the dimensions for validity and consistency.

4.7 VALIDITY AND RELIABILITY ISSUES

Creswell (2014) caution that establishing validity and reliability of the research process from start to finish with particular focus on the measurement scores attained from the instruments, will lead to meaningful interpretation of the data that was collected.

4.7.1 Validity

Creswell (2014) explain that validity of a scale refers to whether one can extract meaningful inferences from scores on the characteristics being measured. The forms of validity that were considered, are discussed in the following section.

4.7.1.1 Content validity

Content validity confirms whether or not the items intended to measure a certain construct have adequately covered the entire domain of the construct being measured.

To complete the intention of the study, the researcher began with the Utilitarian Motivation Scale that is discussed comprehensively in Chapter 2, section 2.6 (Martinez et al., 2016), realising that the scale did not adequately cover all the constructs that were relevant given the conditions of the study. This resulted in the addition of selected dimensions from the Uses and Gratifications Scale (Ko et al., 2005) that is discussed in Chapter 2, section 2.7 to enhance the validity of the findings.

Because the questionnaire design can affect the response rate, effort was made to ensure that it is easy to complete, that questions are clear, simple and easy to comprehend, clearly articulating the purpose of the questionnaire, also indicating that the time required for completion would not exceed ten minutes (Saunders et al., 2009). The questionnaire was therefore pre-tested by ten respondents that fit the pre-requisites for inclusion in the sample. Pre-testing is important to establish the content validity of the scores. Thereafter, clarifying adjustments including question structure improvements and formats were made prior to disseminating the questionnaire to the population (Creswell, 2014).

4.7.1.2 Concurrent or predictive validity

This refers to how well score results produced by the measurement scale correlate with other items and how well a scale can forecast a future criterion. For this study, both the Utilitarian Motivation Scale and the Uses and Gratification Scales were subjected to correlation tests to delete items that had no significant relationship with other items in the same section, to increase the validity of the findings.

4.7.1.3 Construct Validity

Is noted as the most advanced however equally challenging category of validity to forge, as it requires convergent, discriminant and nomological validity. The researcher consulted extant literature and acknowledged the recommendations of researchers in terms of the inclusion of constructs and measures (Malhorta et al., 2007). During the composition of the scales, recommendations by Ko et al. (2005) to include certain dimensions were implemented as explained in Section 4.4.5.2.

4.7.2 Reliability

The researcher scrutinised the reliability scores produced for the chosen scales by previous researchers to establish the instrument's reliability initially (Creswell, 2014) The scales used for the study demonstrated internal consistency, thus items responses were consistent across the constructs. The scales nevertheless endured reliability testing, by calculating Cronbach's Alpha where relevant, to ensure that the same applied for use of the scales in a South African context. This was also necessary because the phrasing of a number of the items were somewhat adapted to be more suitable for the study.

The Utilitarian Motivation Scale modelled by Martinez-Lopez et al. (2014) initially comprised of eleven dimensions derived from literature and underwent three phases to fully delimit the dimensional structure. First correlation tests between construct variables were conducted to refine the scale to ten dimensions. Secondly, a qualitative investigation reduced to the dimensions to nine. A final quantitative analysis resulted in the final eight dimensions with 36 items, which were used as point of departure in this study assuming that it would again be subjected to reliability testing.

The Uses and Gratifications Theory is treated as an axiomic theory, indicating that its principles can be adapted to every kind of mediated communication method, with literature dating back to the 1960's. The scale developed from this theory, describes how psychological needs shape individual's use of media and what motivate them to engage and seek gratification (Ko et al., 2005). By virtue of its continued application over five decades, its reliability is not questioned due to consistent results over time. However, reliability coefficients were nevertheless calculated to confirm the reliability of the scale in a South African context during data analysis.

The original validity and reliability indications may be the same for the new instrument Because different scales were combined and were adapted to suit the study's purposes, which is also applied in a different context (South Africa). The re-establishment of validity and reliability was therefore critical during data analysis. To that end, a copy of the original instrument dimensions and items have been included in Annexure 1 as a point of reference and comparison, but the final items will be indicated later on following the reliability tests where a Cronbach's Alpha ≥ 0.7 is regarded as acceptable (Kent, 2015).

4.8 ETHICAL CONSIDERATIONS

Creswell (2014) cautions that researchers should be cognisant of the ethical issues that need to be considered prior to, and throughout the research process, where research involves the collection of data from people about people. Flick (2015) elaborates that the aim of research ethics is the protection of those being researched. Flick (2015) cites Murphy and Dingwall (2011, p.339) who developed an ethical theory framework based on four guiding principles, protecting those being researched. Ultimately, researchers should avoid doing harm to participants and research on human subjects should produce some positive and identifiable benefit from the study's outcomes. Participants' values, decisions and opinions should be respected at all times, and all people should be treated equally and with respect. Creswell (2014) provides guidance on how ethical issues have to be attended to during each stage in the research process. Each stage is hence described in terms of the actions that were implemented to ensure ethical conduct.

Ethical considerations are relevant throughout the entire research process. Before the study commenced, the researcher ensured the adherence to professional and institutional standards by submitting a research proposal to the institution (GIBS) for ethics approval, including the relevant application documentation and strictly abiding by the ethics committee's code of conduct. Data collection only commenced once approval was granted on the 13th of August 2018 (Annexure 3 presents evidence of the letter of approval).

The benefits to be gained from the insights collected were communicated briefly in the cover letter of the questionnaire for respondents to take note of. Thus, the purpose of the study was disclosed, and it was noted that participants could withdraw at any stage without penalties if they wished to do so (Flick, 2015).

Evidence is presented in Figure 4.2.

FIGURE 4.2: CONSENT STATEMENT

Dear sports enthusiast,

I am conducting research on **Millennials' motivation to consume sport content online.** To that end, your contribution towards this academic endeavor which forms part of my MBA studies, will be highly appreciated. At the same time, your contribution will be useful in terms of an understanding of the benefits Millennials derive from consuming sport content online, which will enable content providers to be more customer centric in their offerings.

The questionnaire should take no more than **10 minutes** of your time. Your participation is voluntary, and you can withdraw at any time without penalty. Your participation is anonymous and all data will be kept confidential as only aggregated data will be reported.

By completing the survey, you indicate you willingness to voluntarily participate in this research. If you have any concerns, please do not hesitate to contact my supervisor or me. Our details are provided below.

Researcher: Nadia Gossmann
04898461@mygibs.co.za

Supervisor: Prof Alet Erasmus
alet.erasmus@up.ac.za

During data collection, the integrity of information collected was upheld, no falsely completed questionnaires were added to reach set quotas. When analysing data, the researcher reported all findings and did not withhold unfavourable findings or tamper with the findings. The researcher respected the privacy of participants: no names were requested, and only aggregated data is reported. The raw data is stored electronically and will be in safekeeping for a minimum of 10 years by GIBS, after which it will be discarded to avoid misappropriation.

Overall, the aim was to produce a transparent research report, prevent participants from harm, and take care of data protection (Flick, 2015). Ultimately, the objective was to end up with truthful results because the research instrument, the research process as well as data analysis were done in a thoughtful and honest manner without any tampering at any stage to manipulate the findings.

4.9 LIMITATIONS

The following are a few limitations that were experienced during the research process.

- Making use of an online survey was limiting as the sample was restricted to those who have access to the Internet, and who have received the link in order to participate.
- Using Facebook and Twitter as the primary platform to be notified about the study and optional participation thereof, again restricted respondents to those who have a user account.
- Due to the one-way nature of the self-administered online questionnaire that leaves no opportunity to clarify uncertainties, respondents
    - may not have completely understood the context of the study,
    - may have interpreted questions differently due to cultural bias
    - may have become despondent because they are unable to clarify uncertainties.
    - May have found the questionnaire too long and quit mid way through

Using tables and figures to visually present the results where relevant, results of the investigation are provided in chapter 5.

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CHAPTER 5

PRESENTATION OF RESULTS

CHAPTER 5: RESULTS

5.1 INTRODUCTION

This chapter presents the results that were obtained after analysing the quantitative data, gathered by means of a structured online questionnaire. The demographic profile of the survey respondents are presented first, followed by the validity and reliability outcomes. The results are presented in accordance with the objectives documented in chapter three. The descriptive statistics are summarised and presented in tables with numerical values such as frequencies, percentages, means and standard deviations, and visual presentations in the form of graphs are included for selected parts of the findings.

5.2 DEMOGRAPHIC CHARACTERISTICS OF THE SAMPLE

5.2.1 Sample Size

The survey stipulated three pre-requisites for the inclusion in the study, specifically that respondents had to be sports viewers, who reside in Gauteng, and qualified to be categorised as Millennials, thus between the ages of 20 - 34 years at the time of the data collection. A total of 252 responses were collected on the SurveyMonkey platform, of which only 176 were valid, as the rest unfortunately did not meet all the pre-requisites for inclusion. A scrutiny of the questionnaires revealed that 64 respondents were older; 35 resided outside of Gauteng; 7 never watched sport; while 15 did not complete the survey in totality or their responses were doubted, for example indicating the same answer for each question. Therefore, a total of 76 invalid responses were eliminated, to ensure a usable data set. Due to the smaller sample size than envisaged, the results of the study are not representative and unfortunately not generalisable. However, the sample size was useful to perform the anticipated statistical procedures and the outcomes of the study would nevertheless be useful to pursue further research on a less restricting budget and time limitation.

5.2.2 Gender

There was a deliberate intent to attain a gender split of 70.0% male and 30.0% female respondents as the unit of analysis for this study, which is consistent with sports studies in the South African context (Kantar TNS, 2017). This was achieved with valid usable responses as depicted in Figure 5.1, showing 71.0% (n=125) male - and 29.0% (n=51) female respondents.
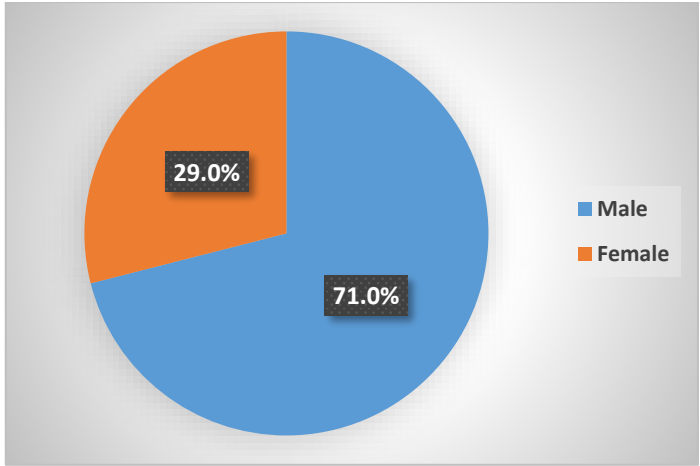
FIGURE 5.1: SAMPLE'S GENDER BREAKDOWN

5.2.3 Age

The valid age of respondents was restricted to ages 20 – 34, and this was then grouped into three subgroups with five-year intervals, i.e.: ages 20 - 24; ages 25 - 29; and 30 – 34 years old. The largest representation of respondents were in the older, 30 - 34 year age group (53.4%/ n = 94); followed by 35.8% (n=63) in the 25 – 29 year age group; and the remaining 10.8% (n=19) in the youngest 20 – 24 year old age group as depicted in Figure 5.2.
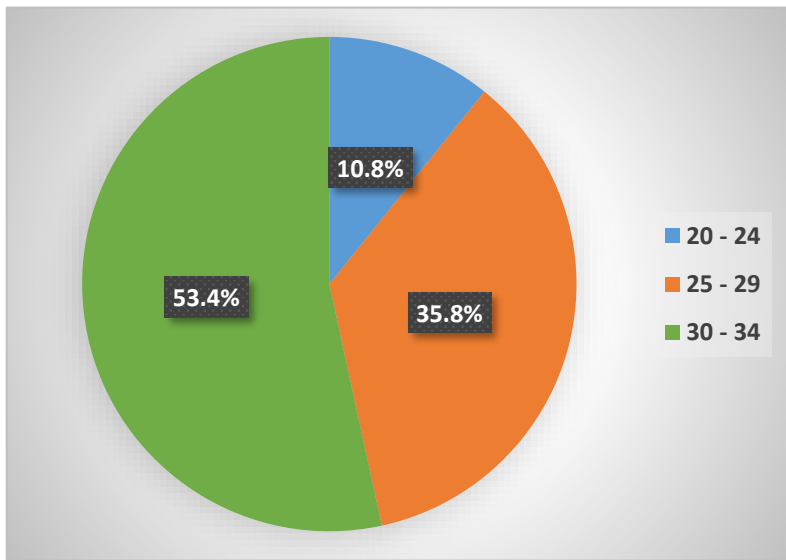
FIGURE 5.2: AGE BREAKDOWN

For the purpose of comparisons, the sample's age categories were reordered by combining the younger Millennials (20 - 24 combined with the 25 – 29 year olds), representing 46.6% (n = 82) of the sample; plus the older more experienced Millennials

who have probably developed more established ways of sports viewing (n =94/ 53.4%) constituting the remaining of the sample as depicted in Figure 5.3.
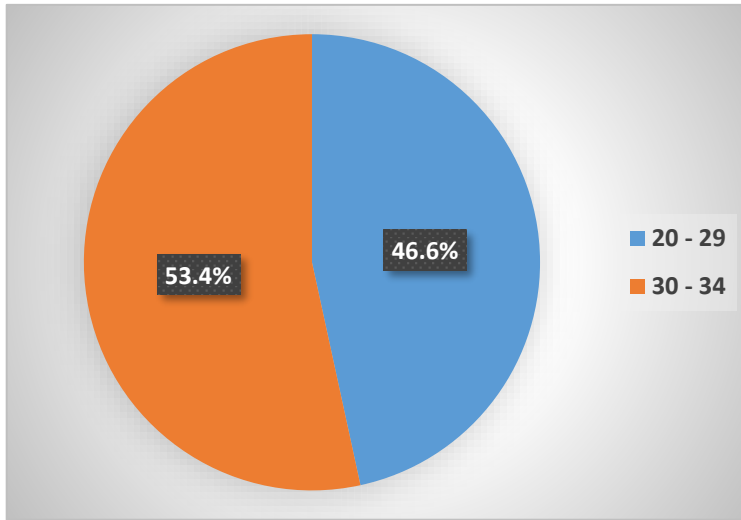
FIGURE 5.3: AGE GROUPS RE-ORDERED

5.2.4 Household Income

Household income levels were well represented across the sample as illustrated in Figure 5.4. Household income rather than individual income was used to allow for the fact that respondents may have partners, spouses and parents contributing to their disposable incomes, also sport and general entertainment consumption on traditional television or OTT services are generally observed as a household expense (Kantar TNS, 2017). The largest group (31.8%/ n = 56) of respondents were in the highest household income group earning more than R50 000 per month; followed by 16.6% (n = 29) and 15.9% (n = 28) earning >R30,000 up to R40 000, and >R40,000 up to R50 000 monthly, respectively. The lower income groups consisted of 14.2% (n = 25) earning less than R10 000, as well as 10.9% (n =19) and 10.3% (n = 18) with monthly earnings of >R10 000 up to R20 000, and >R20 000 up to R30 000 respectively.

Household income was re-ordered for a comparison of fewer groups statistically, which resulted in three final household income groups, namely: 35.2% (n = 62) with a household income of R30 000 or less; 32.4% (n = 57) earning >R30 000 to R50 000 monthly; and 31.8% (n = 56) earning more than R50 000 per month. The tree income categories are depicted in Figure 5.5
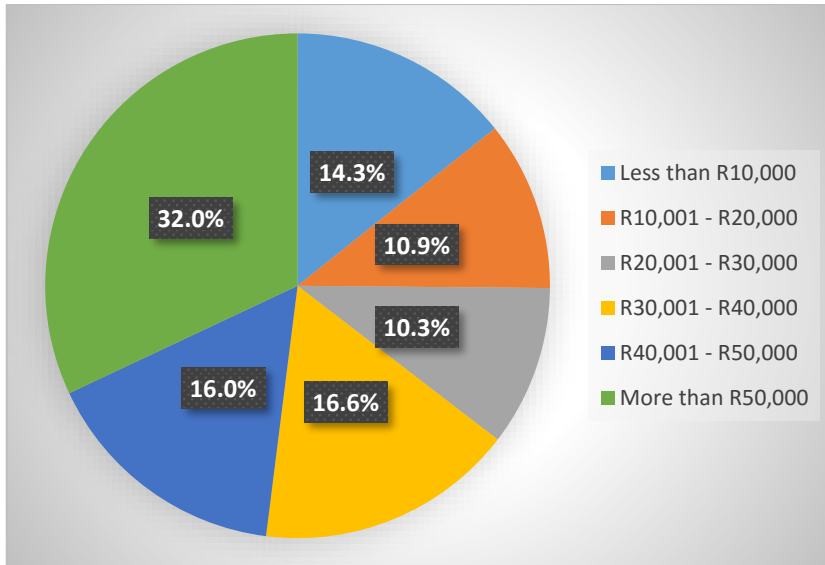
FIGURE 5.4: INITIAL HOUSEHOLD INCOME GROUPS
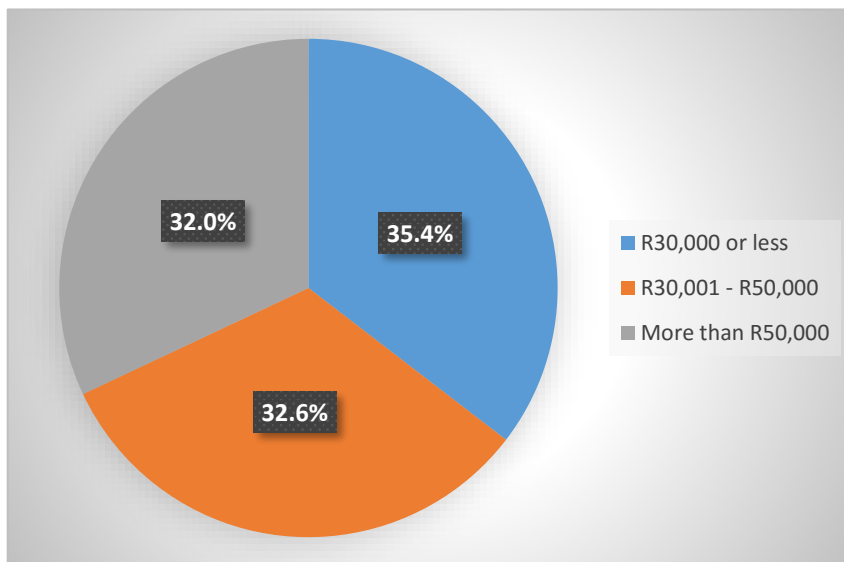
FIGURE 5.5: HOUSEHOLD INCOME REGROUPED

5.2.5 Population Group

Respondents indicated their population group in accordance with the population groups recorded in the 2011 South African Census (StatsSA, 2011). Figure 5.6 shows that the majority of respondents were Black (40.3% / n = 71), followed by 28.4% (n = 50) White, then 19.3% (n = 34) Coloured, 10.2% Indian/Asian (n =18), and 1.7% Other (n = 3). Although this is not a representation of the population of Gauteng, it was comforting to have a larger representation of Blacks and a fairly good representation of Coloured sports viewers. Figure 5.6 presents a visual presentation of the populations groups included in the sample.
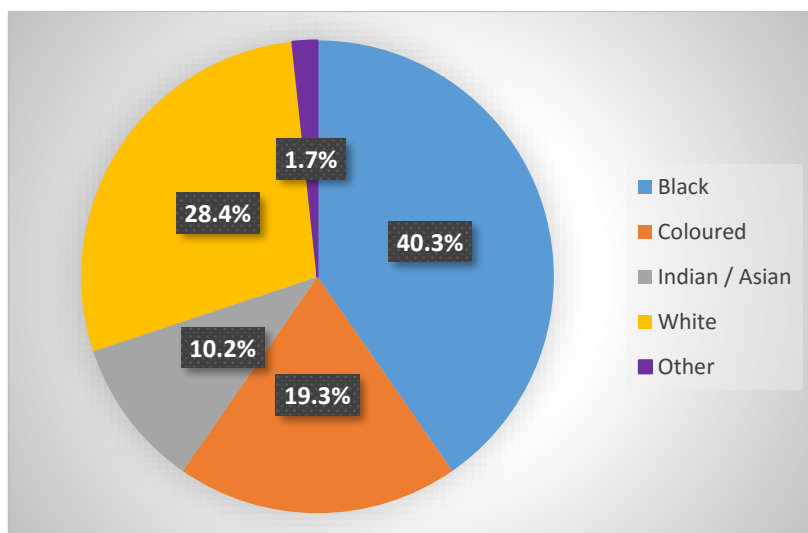
FIGURE 5.6: POPULATION GROUP BREAKDOWN

5.2.6 Summary

Despite having to rely on a non-probability sampling method, the researcher managed to recruit an acceptable representation of males versus females, of which the largest percentage was more experienced individuals, aged 30 years or older who probably had developed pertinent sports viewing behaviours, which was acceptable in the context of the study. Although not representative of the population representation in Gauteng, the sample involved an acceptable distribution of various population groups, including more Blacks than Whites, as well as an encouraging representation of Coloureds. The income distribution of the sample was acceptable to enable inferences about affordability of various media for sports consumption.

5.3 SPORTS VIEWERSHIP BEHAVIOUR OF THE SAMPLE (OBJECTIVE 1)

The sports viewing behaviour of respondents was first established, i.e.: an investigation of Millennials' online sport consumption in terms of: (1.1) frequency of sports viewership, (1.2) duration of sports viewership, and (1.3) media used.

5.3.1 Frequency Of Sport Viewership

Respondents indicated how frequently they have watched sport during the preceding twelve months before completion of the survey. The results are depicted in Figure 5.7 while Figure 5.8 indicates that three major clusters emerged, of whom 46.6% (n = 82) of the respondents viewed sport daily (the regulars), and 31.3% (n = 55) viewed sport weekly (the fairly frequent viewers), while the remainder (22.2% / n = 39) were casual

viewers who watched sport monthly or occasionally. These three categories were used for statistical analysis.
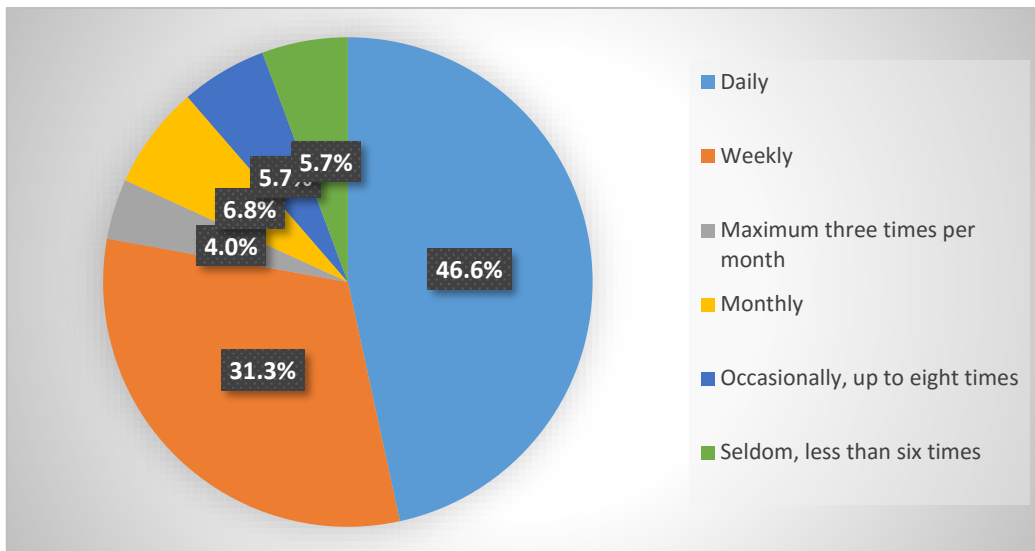
FIGURE 5.7: FREQUENCY OF SPORT VIEWERSHIP DURING THE PREVIOUS 12 MONTHS
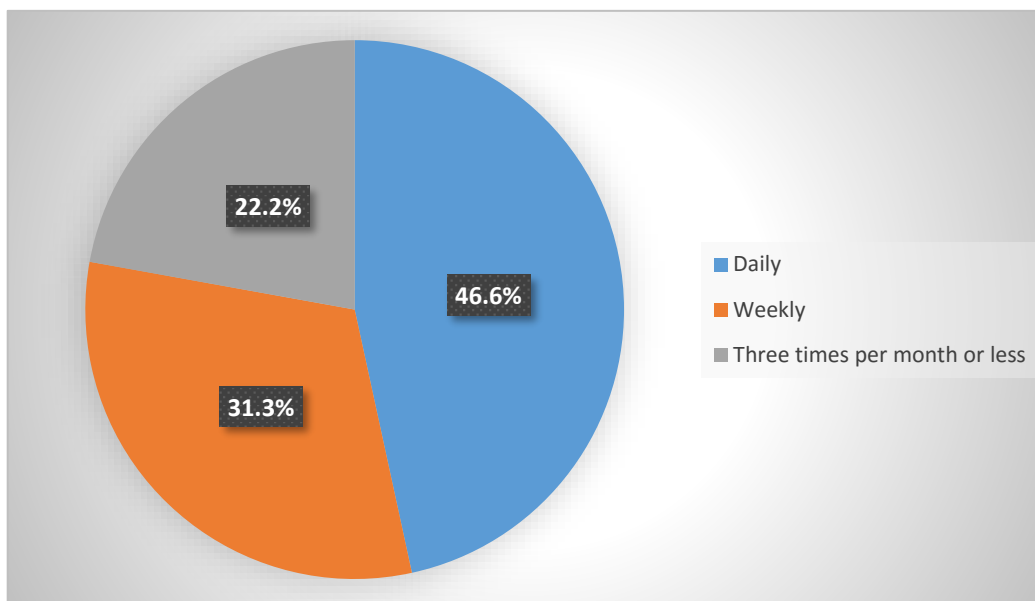
FIGURE 5.8: FREQUENCY OF SPORT VIEWERSHIP REORDERED

5.3.2 Media Type Preference For Sport Content Consumption

Respondents were asked to detail the variety of media types they use for sport consumption and to indicate their preference on a four-point Likert-type scale, with 'Always' representing 4, i.e. the strongest preference, and 'Never' representing 1, thus the least preferred medium. The results in Table 5.1 present the means and medians calculated, that are better at distinctly representing respondents' preferences compared to percentages calculated from the Likert-type scale. The means are presented in descending order, and were interpreted as follows:

M>1<2: low preference
M$\geq$2<2.5: below average preference
M$\geq$2.5<3: moderate preference
M$\geq$3<3.5: above average preference
M$\geq$3.5$\leq$4: most preferred

Results reveal that Live TV was still the most preferred (M = 3.25) medium to view sports, followed by sport broadcasters' websites (M = 2.58). Slightly less preferred, but almost equally used, are news websites (M = 2.43), streaming websites (M = 2.31) and YouTube (M = 2.31), followed by mobile sports app's (M = 2.15); Twitter (M = 2.14); fantasy leagues and prediction games (M = 2.13); and league and tournament websites (M = 2.10); Facebook M = 2.04); Instagram (M = 1.87), and Snapchat (M = 1.11) were used, but indeed less popular than the first four. The results indicate that TV or watching a live or linear match is still the preferred medium to consume sport content, even by Millennials, and this is reinforced by the second most preferred medium, namely broadcasters' websites, which is the online or streaming version of the TV or linear broadcast.

TABLE 5.1: SPORT VIEWERSHIP MEDIA TYPE

	Media Type	Mean	Mode
S2.7.1	**Live TV**	3.25	4
S2.7.2	**Broadcaster websites and app's**	2.58	2
S2.7.9	**News websites**	2.43	2
S2.7.3	**Streaming websites and app's**	2.31	2
S2.7.4	**YouTube**	2.17	2
S2.7.10	**Mobile sport app's**	2.15	2
S2.7.6	**Twitter**	2.14	1
S2.7.12	**Fantasy League and Prediction game sites**	2.13	1
S2.7.11	**League and Tournament websites**	2.10	2
S2.7.5	**Facebook**	2.04	2
S2.7.7	**Instagram**	1.87	1
S2.7.8	**Snapchat**	1.11	1

5.3.3 Duration Of Sports Content Preferred

Respondents were required to indicate in order of preference, their top three preferences in terms of the way (implying the duration) of sport content viewing. Table 5.2 presents the mean calculated for every option across the sample. Results indicate that a full live match, which is the lengthiest manner in which to watch a sports match, was first preference (M = 2.32); followed by "5 to 10-minute highlights" (M = 1.08) and then "15 to 30 minute extended highlights" (M = 0.66). Considering the maximum (M = 3), it seems as if the two most popular options, are: watching a live match and watching short highlights. Therefore, Millennials apparently still mostly prefer to watch a full live match. Their second most-preferred option, is watching "5 to 10-minute highlights", that can be found on broadcaster websites and YouTube, but not on social media.

TABLE 5.2: DURATION OF CONTENT VIEWING

Duration of content viewing	Mean
S2.8.1 Full live match	2.32
S2.8.3 5 - 10 minute highlights	1.08
S2.8.2 15 – 30 minutes extended highlights	0.66
S2.8.4 2 – 4 minute clips	0.55
S2.8.7 Documentaries	0.40
S2.8.6 Magazine shows	0.39
S2.8.5 Up to 1 minute clips	0.32

Based on Millennials' sports viewing behaviour, the traditional ways of sports broadcasting seem to offer what they require.

5.4 MILLENNIALS' MOTIVATION TO CONSUME SPORT CONTENT ONLINE (OBJECTIVE 2)

The next objective of the research was to investigate and describe Millennials' motivation to consume sports content online, specifically, (2.1) to discriminate the strength of different motivational factors, and (2.2) to discriminate possible significant demographic differences in motivation within the Millennial age cohort.

5.4.1 The Strength Of Different Motivational Factors To Consume Sport Content Online (Objective 2.1)

5.4.1.1 The EFA procedure

As a first step, Exploratory Factor Analysis (EFA) was used to discriminate the different dimensions (motivations) within the context of this research where the battery of questions (35) comprised of a combination of two different scales, suggesting seven motivational factors based on literature. The Statistical Package for the Social Sciences (SPSS) was utilised to perform the EFA, specifically Principal Axis Factoring as the Extraction Method, with Varimax rotation and Kaiser Normalization as the rotation method. Upon scrutiny of the content of the factor extrusion and related Cronbach's Alpha, the five-factor extraction seemed the most acceptable outcome rather than the seven factors/ dimensions that the original scales suggested. The five factor solution allowed for a more meaningful interpretation of the factor loadings (Pallant, 2013, p.183). The factors were subsequently named/labelled to appropriately describe the items that constitute each factor, Annexure 4 showcases a colour breakdown of the rotational factor loadings. The EFA outcome is presented in Table 5.3.

The five factors were labelled:

Factor 1: Personal interest and preference (12 items)
Factor 2: Social interaction motivation (7 items)
Factor 3: Convenience and control (6 items)
Factor 4: Value for money and Affordability (7 items)
Factor 5: Customisation and Entertainment (5 items)

The means calculated for the five increments "Agreement" scale, were interpreted as follows:

M<1.5: Strongly disagree
M$\geq$1.5<2.5 disagree
M$\geq$2.5<3: Neutral/ Hesitance/ Doubt
M$\geq$3<4: Agree
M$\geq$4: Strongly agree

TABLE 5.3: ONLINE CONSUMPTION MOTIVATIONS: FACTOR MATRIX

Items	Factor				
	F1	F2	F3	F4	F5
To keep up with what's going on in my favorite sport	0.690				
With online sports consumption, I am able to control my frequency of consumption	0.683				
Only consuming or being served the sport content I am interested in makes me feel in control of my viewing experience	0.678				
Online I can choose or customize only the sport and teams that interest me	0.655				
I consume sport content online because I find it entertaining	0.610				
Online, I have the option to consume only the sport content and team that interest me	0.544				
Having 24/7 access to sport content online, gives me a sense of control of my consumption process	0.527				
Watching or consuming sport content online makes my life easier	0.492				
Watching sport content online allows me to watch whenever I want	0.487				
I can follow my favourite clubs and athletes	0.445				
I watch sport content online because of the variety of sports content that are available in formats I like	0.431				
The Internet provides me with a broad selection of sport content I would not otherwise have access to	0.387				
To engage with people who share my sport interests		0.812			
So I can be in touch with other people's opinions		0.753			
To share my views on the site		0.732			
To participate in fan discussions		0.731			
To express myself freely		0.659			
What I value by consuming sport online is the availability of information from the sports commentators as well as other sport fans.		0.562			
By customizing my online sports consumption, I feel unique		0.426			
Consuming sport content online fits my schedule			0.701		
Online, I can match my sports content consumption according to my needs			0.589		
Thanks to the many sources of sport content online, I have quick and easy access to the information I want, which makes me feel like an empowered online consumer			0.579		
I consume sport content online because I find it enjoyable			0.520		
I like to feel I have control over the medium/ device I want to consume sport content on.			0.465		
Using the Internet to watch or consume sport content is convenient for me			0.360		
I save a lot by consuming sport content online				0.656	
Consuming sport content online is good value for money				0.636	
I watch sport content online because there I can get what I want				0.534	
By using affordable or free alternatives online I feel in control of my sport content consumption				0.497	
Financially, the availability of different media sources is beneficial to me in terms of my sport content consumption				0.403	
Online sport content sources provide me with the kind of decision-making information that I did not have access to before.				0.395	
I watch sport content online because it provides me with quick and easy access to sports content I do not have access to on conventional TV				0.341	

TABLE 5.3 continued

Items	Factor				
	F1	F2	F3	F4	F5
Even when I consume sport content on TV, I go online for additional sport content					0.509
Watching or consuming sport content online saves me a lot of time					0.501
I consume sport online as I just like to surf the Internet					0.447
When I plan to consume sport content I often use information I find on the Internet					0.407
I consume sport online to pass the time					0.371
Mean	3.90	3.12	4.04	3.71	3.42
Standard Deviation	0.61	0.85	0.64	0.67	0.71
% Variance Explained	14.75	11.20	10.23	7.78	5.57
Cronbach Alpha	0.91	0.89	0.81	0.82	0.71

Factor loadings represented by the relationship coefficients between the factors and variables, ≥ 0.3 were considered of significance for the purpose of the analysis (Pallant, 2013, p.185; Field, 2013 p.666).

The respective Cronbach Alpha values of the factors (F1α = 0.909, F2α = 0.886, F3α = 0.814, F4α = 0.815, F5α = 0.711) illustrate internal consistency within the factors (Field, 2013, p.681) and thus confirmed that further statistical analyses could be done. Compared to the original scales on "Utilitarian Motivation" by Martinez-Lopez et al., (2014) and "Uses and Gratification" by Ko et al., (2005), items within factors have shifted. Nevertheless, all factors were considered useful based on the Cronbach Alpha values ($\alpha \geq 0.7$), hence no items were deleted for the final factor constructs.

The percentage variance explained amounted to 49.53% which is noted as acceptable (Wegner, 2017). Standard deviations were acceptable within a range of 0.613 and 0.845 from the mean indicating little variance from the average (Salkind, 2016), therefore that responses were fairly consistent.

The mean values for the factors varied between, M = 3.120 and M = 4.037 (Mean$_{maximum}$ = 5). Based on the means, it seems that across the sample, Millennials:

- *Strongly agree* that **F3: *Convenience and control*** (M=4.04), motivates them to watch sport content online. This hence seems the strongest motivation.
- *Agree* that they are motivated by the following factors, in descending order: **F1: Personal interest and preference** (M = 3.90); **F4: Value for money and Affordability** (M = 3.71); as well as opportunity for **F5: Customisation and Entertainment** (M = 3.42) to watch sport content online.
- Hesitance/ doubt concerning **F2: Social interaction motivation** (M =3.12), as a motivation to watch sport content online

Factor 1: Personal interest and preference

Factor 1 of the study was renamed 'personal interest and preference' and included two of the original 12 items from the original utilitarian motivation scale by Martinez-Lopez et al., (2014), namely:

- S3.9.4 Only consuming or being served the sport content I am interested in makes me feel in control of my viewing experience
- S3.9.3 Having 24/7 access to sport content online, gives me a sense of control of my consumption process

Other items that diverted to this factor, include seven items from other original "utilitarian motivation" scale by Martinez-Lopez et al., (2014), specifically from the following constructs/ dimensions - Convenience, Variety Of Content, Customisation as well as three items from other original factors in the "Uses And Gratification Scale" by Ko et al. (2005) including items from Entertainment and Social Interaction Motivation, namely:

- S3.15.2 To keep up with what's going on in my favourite sport
- S3.13.5 With online sports consumption, I am able to control my frequency of consumption
- S3.13.1Online I can choose or customize only the sport and teams that interest me
- S3.14.4 I consume sport content online because I find it entertaining
- S3.13.2 Online, I have the option to consume only the sport content and team that interest me
- S3.10.2 Watching or consuming sport content online makes my life easier
- S3.10.5 Watching sport content online allows me to watch whenever I want
- S3.15.7 I can follow my favourite clubs and athletes
- S3.11.3 I watch sport content online because of the variety of sports content that are available in formats I like
- S3.11.4The Internet provides me with a broad selection of sport content I would not otherwise have access to

Factor 2: Social interaction

Factor 2 retained five of the seven items from the original "Uses and Gratification Scale" by Ko et al. (2005) that involve the social interaction motivation factor. Below are the items that were retained from the scale:

- S3.15.4   To engage with people who share my sport interests
- S3.15.1   So I can be in touch with other people's opinions
- S3.15.6   To share my views on the site

- S3.15.5   To participate in fan discussions
- S3.15.3   To express myself freely

Two additional factors were added from the "Utilitarian Motivation Scale" by Martinez-Lopez et al., (2014) and these items pertain to availability of information and customisation, namely:

- S3.12.1   What I value by consuming sport online is the availability of information from the sports commentators as well as other sport fans.
- S3.13.3   By customizing my online sports consumption, I feel unique

Factor 3: Convenience and Control

Factor 3 was encompassed convenience and control motivations, and combined the first and second factors ('Desire For Control' and 'Convenience') from the "Utilitarian Motivation Scale" by Martinez-Lopez et al., (2014) plus one item from 'Desire For Control' dimension and two items from 'Convenience' dimension, namely:

- S3.9.2 I like to feel I have control over the medium/ device I want to consume sport content on.
- S3.10.4 Consuming sport content online fits my schedule
- S3.10.3 Using the Internet to watch or consume sport content is convenient for me

The new factor two additional items that diverted from other factors from the "Utilitarian Motivation Scale" by Martinez-Lopez et al., (2014) with reference to Customisation and Availability of Information, specifically:

- S3.13.4 Online, I can match my sports content consumption according to my needs
- S3.12.2 Thanks to the many sources of sport content online, I have quick and easy access to the information I want, which makes me feel like an empowered online consumer

This factor also includes one item from the "Uses and Gratification Scale" by Ko et al. (2005) that was associated with Entertainment motivation, namely:

- S3.14.3 I consume sport content online because I find it enjoyable

Factor 4: Value for money and Affordability

Factor 4 entailed affordability issues and contains a number of items from the "Utilitarian Motivation Scale by Martinez-Lopez et al. (2014). The items that merged to form this factor included mostly, items that pertained to cost or value to view sport content, originally from the following factors: Desire For Control, Variety of Content, and Availability of Information. Below are the items:

- S3.11.6 I save a lot by consuming sport content online
- S3.11.5 Consuming sport content online is good value for money
- S3.11.1 I watch sport content online because there I can get what I want
- S3.9.1 By using affordable or free alternatives online I feel in control of my sport content consumption
- S3.12.5 Financially, the availability of different media sources is beneficial to me in terms of my sport content consumption
- S3.12.4 Online sport content sources provide me with the kind of decision-making information that I did not have access to before.
- S3.11.2 I watch sport content online because it provides me with quick and easy access to sports content I do not have access to on conventional TV

Factor 5: Customisation and Entertainment

Factor 5 was named to represent the five items in the construct. This factor includes two items from the first factor – Entertainment Motivation - from the "Uses and Gratification Scale" by Ko et al., (2005) namely:

- S3.14.2 I consume sport online as I just like to surf the internet
- S3.14.1 I consume sport online to pass the time

Two additional items were included from the original Availability of Information factor from the "Utilitarian Motivation Scale" by Martinez-Lopez et al., (2014), namely:

- S3.12.6 Even when I consume sport content on TV, I go online for additional sport content
- S3.12.3 When I plan to consume sport content I often use information I find on the Internet

One item from the original Entertainment Motivation factor from the "Uses and Gratification Scale" by Ko et al. (2005), specifically:

- S3.10.1 Watching or consuming sport content online saves me a lot of time

Upon scrutiny of the factors ant their new labels, it was decided the constructs/ could be useful to describe sports viewers' motivations.

5.4.2 Demographic Differences In Millennials' Motivation To Consume Sport Content Online (Objective 2.2)

Tests for comparisons were used to determine possible significant demographic differences (gender, age, household income, population group differences) in motivation among demographic groups within the Millennial age cohort. The study utilised a level of significance at the 95% confidence level, therefore only values of p≤0.05 are viewed as significant (Blaikie, 2004, p.182).

5.4.2.1 Gender differences

The non-parametric Mann-Whitney U Test was administered, determining whether any significant differences exist between the two independent (male and female) groups (Pallant, 2013, p.220). Table 5.4 showcases a comparison of the means for males versus females. Results reveal that significant gender differences exist for only two of the five factors. With respect to the motivational factor:

F1: Personal Interest and Preferences, men are significantly more motivated by this factor (M =3.96), compared to females (M = 3.77) (p =0.04).
F3: Convenience and Control, men (M =4.09) are significantly more motivated hereby than females (M=3.90) (p =0.021). This is also the most important motivational factor for both.

Therefore, with respect to the other three factors (motivational factors), namely **F2: Social Interaction Motivation; F4: Value for Money and Affordability;** and **F5: Customisation and Entertainment,** gender differences were not significant (p>0.05). For both males and females, **F2: Social Interaction Motivation** is the weakest motivation to consume sport content online while **F3: Convenience and Control,** is the strongest motivation.

TABLE 5.4: GENDER DIFFERENCES

Factor	Gender	N	Mean	SD	Sig. (2-tailed)
F1: Personal interest and preference	Male	125	**3.96**	0.633	**0.040**
	Female	51	**3.77**	0.544	
F2: Social interaction motivation	Male	125	3.09	0.872	0.409
	Female	51	3.19	0.778	
F3: Convenience and control	Male	125	**4.09**	0.659	**0.021**
	Female	51	**3.90**	0.560	
F4: Value for money and Affordability	Male	125	3.72	0.716	0.472
	Female	51	3.67	0.550	
F5: Customisation and Entertainment	Male	125	3.43	0.761	0.421
	Female	51	3.39	0.591	

5.4.2.2 Age differences

An independent samples t-test, generally used to determine if there are significant differences between the means of two groups (Field, 2013, p.324) was conducted to compare the two age categories (younger and older Millennials). Table 5.5 showcases that the only factor where significant differences ($p<0.05$) could be confirmed, was for **F2: Social Interaction Motivation,** indicating that the younger category aged <30 years, are significantly more motivated ($p = 0.01$) hereby (M = 3.30) than their older counterparts (M =2.96). For both, this was nevertheless the weakest motivation to view sports content online. Differences for the other four factors were not statistically significant ($p>0.05$).

TABLE 5.5: AGE CATEGORY DIFFERENCES

Factor	Age	n	Mean	SD	Sig.
F1: Personal interest and preference	20 - 29	82	**3.94**	0.66	0.52
	30 - 34	94	**3.88**	0.57	
F2: Social interaction motivation	20 - 29	82	3.30	0.85	**0.01**
	30 - 34	94	2.96	0.81	
F3: Convenience and control	20 - 29	82	**4.05**	0.71	0.79
	30 - 34	94	**4.02**	0.57	
F4: Value for money and Affordability	20 - 29	82	3.79	0.70	0.14
	30 - 34	94	3.64	0.64	
F5: Customisation and Entertainment	20 - 29	82	3.38	0.74	0.50
	30 - 34	94	3.45	0.70	

5.4.2.3 Household income differences

A one-way ANOVA test was conducted with the purpose to indicate significant differences ($p>0.05$) in demographic categories comprising of three or more groups (Field, 2013, p.207). Table 5.6 indicates that the only factor where significant differences ($p<0.05$) could be confirmed, was for **F2: Social Interaction Motivation** ($p = 0.00$).

TABLE 5.6: ONE-WAY ANOVA (HOUSEHOLD INCOME)

Factor	Income	n	Mean	SD	Sig.
F1: Personal interest and preference	R30,000 or less	62	3.90	0.57	0.71
	R30,001 - R50,000	57	3.95	0.61	
	More than R50,000	56	3.86	0.68	
	Total	175	3.90	0.61	
F2: Social interaction motivation	R30,000 or less	62	3.39	0.84	**0.00**
	R30,001 - R50,000	57	3.08	0.79	
	More than R50,000	56	2.88	0.84	
	Total	175	3.12	0.85	
F3: Convenience and control	R30,000 or less	62	3.97	0.67	0.49
	R30,001 - R50,000	57	4.11	0.58	
	More than R50,000	56	4.05	0.67	
	Total	175	4.04	0.64	
F4: Value for money and Affordability	R30,000 or less	62	3.74	0.67	0.64
	R30,001 - R50,000	57	3.74	0.69	
	More than R50,000	56	3.64	0.66	
	Total	175	3.71	0.67	
F5: Customisation and Entertainment	R30,000 or less	62	3.43	0.76	0.74
	R30,001 - R50,000	57	3.46	0.69	
	More than R50,000	56	3.36	0.69	
	Total	175	3.42	0.72	

A Post-Hoc Multiple Comparisons test was then conducted to determine where exactly the differences between groups exist (Pallant, 2013, p.246). Table 5.7 indicates that the lowest household income group (R30,000 or less) is significantly more motivated by the potential that online sports consumption will enhance **F2: Social Interaction,** than the highest income level (>R50,000; M=2.88). Differences between the low and middle-income categories were not significant ($p > 0.05$) and the same applied for the middle and the highest income category.

TABLE 5.7: POST HOC TEST TO SPECIFY INCOME DIFFERENCES

Multiple Comparisons						
Dependent Variable: Scheffe						
(I) rS1.5		Mean Difference (I-J)	Std. Error	Sig.	98,75% Confidence Interval	
					Lower Bound	Upper Bound
R30,000 or less	R30,001 - R50,000	0.314	0.151	0.118	-0.14	0.77
	More than R50,000	.512*	0.152	**0.004**	0.06	0.97
R30,001 - R50,000	R30,000 or less	-0.314	0.151	0.118	-0.77	0.14
	More than R50,000	0.198	0.155	0.445	-0.27	0.66

5.4.2.4 Population differences

The non-parametric Kruskal-Wallis test was utilised to compare independent means of the different population groups rather than the one-way ANOVA as the data extracted was not normally distributed (Field, 2013, p.391). Table 5.7 confirms that the only factor where significant population differences existed, was for **F2: Social Interaction.** Results indicate that there are no significant household population group ($p > 0.05$) in Millennials' motivation to watch sport online as a consequence of the other motivational factors, namely: **F1: Personal Interest and Preference, F3: Convenience and Control, F4: Value For Money and Affordability,** and **F5: Customisation and Entertainment**.

The Krushal-Wallis test was able to test for difference in means, however it cannot determine which factor is influencing the response variable, in this case **F2: Social interaction motivation**. A Mann-Whitney Post-Hoc test was then conducted to determine where exactly the differences between groups exist (Pallant, 2013, p.220). 5.9 illuminates that there are significant differences in the sense that Black sports viewers are significantly more motivated (M =3.34) than White sports enthusiasts (M =2.79) by the possibility that online sports viewing could enhance social interaction. Also, online sports viewers (M =3.17) are significantly more motivated ($p = 0.019$) by social benefits than Whites (M = 2.79). The differences between Black and Coloured viewers is not significant ($p > 0.05$); and the same applies for the difference between the Coloured and the Indian/ Asian group. Overall, social benefits as a motivation for online sports viewing was the strongest among Black sports viewers.

TABLE 5.8: KRUSKAL-WALLIS TEST (POPULATION DIFFERENCES)

Factor	Population Group	n	Mean	SD	Sig.
F1: Personal interest and preference	Black	71	3.97	0.55	0.40
	Coloured	34	3.91	0.56	
	Indian / Asian	18	3.96	0.91	
	White	50	3.82	0.59	
	Total	173	3.91	0.61	
F2: Social interaction motivation	Black	71	3.34	0.82	**0.00**
	Coloured	34	3.17	0.70	
	Indian / Asian	18	3.09	1.08	
	White	50	2.79	0.80	
	Total	173	3.12	0.85	
F3: Convenience and control	Black	71	4.11	0.60	0.17
	Coloured	34	3.82	0.68	
	Indian / Asian	18	4.10	0.73	
	White	50	4.09	0.57	
	Total	173	4.05	0.63	

TABLE 5.8 continued:

Factor	Population Group	n	Mean	SD	Sig.
F4: Value for money and Affordability	Black	71	3.79	0.61	0.77
	Coloured	34	3.64	0.66	
	Indian / Asian	18	3.71	0.91	
	White	50	3.66	0.65	
	Total	173	3.71	0.66	
F5: Customisation and Entertainment	Black	71	3.50	0.65	0.40
	Coloured	34	3.37	0.77	
	Indian / Asian	18	3.53	0.88	
	White	50	3.34	0.65	
	Total	173	3.43	0.70	

TABLE 5.9: POPULATION GROUP SIGNIFICANT DIFFERENCES

Pairs		N	Mean	SD	Mean Rank	Mann-Whitney U	Wilcoxon W	Z	Sig. (2-tailed)
Pair 1	Black	71	3.34	0.823	55.07	1060.000	1655.000	-1.009	0.313
	Coloured	34	3.17	0.704	48.68				
Pair 2	Black	71	3.34	0.823	46.41	539.000	710.000	-1.023	0.306
	Indian / Asian	18	3.09	1.078	39.44				
Pair 3	**Black**	71	3.34	0.823	70.75	1082.500	2357.500	-3.651	**0.000**
	White	50	2.79	0.803	47.15				
Pair 4	Coloured	34	3.17	0.704	27.00	289.000	460.000	-0.328	0.743
	Indian / Asian	18	3.09	1.078	25.56				
Pair 5	**Coloured**	34	3.17	0.704	50.04	593.500	1868.500	-2.342	**0.019**
	White	50	2.79	0.803	37.37				
Pair 6	Indian / Asian	18	3.09	1.078	38.03	386.500	1661.500	-0.885	0.376
	White	50	2.79	0.803	33.23				

5.5 A COMPARISON OF MILLENNIALS' MOTIVATION TO CONSUME SPORT CONTENT ONLINE AND THEIR SPORTS VIEWERSHIP (OBJECTIVE 3)

The next objective of the research was to correlate Millennials' motivation to consume sport content online, specifically the frequency of sports viewership by means of different media types (3.1) and duration of sports viewership (3.2) with each motivational factor within the Millennial age cohort. A Pearson Correlation test was conducted to examine the relationship between the dependent and independent variables described above, interpreting a coefficient value between $0.1 < r < 0.299$ as a weak correlation; $0.3 < r < 0.499$ moderate correlation and $r > 0.5$ strong correlation. The study utilised a level of significance of 95% ($\alpha = 0.05$) (Field, 2013, p.170).

5.5.1 A Comparison Of Frequency Of Sports Viewing And Motivation To Consume Sport Content Online (Objective 3.1)

Table 5.10 reveals the correlations between each media type and the five motivational factors, with a noteworthy absence of a strong correlation between any of the media type frequencies and motivational factors. The results unveil that there is:

- A weak positive relationship between:
  - Streaming site (r=.257); Facebook (r=.170); Twitter (r=.154); Instagram (r=.150); news website (r=.279); mobile sports app (r=.266); Fantasy league and prediction games (r=.176) and **F1: personal interest and preference**
  - Broadcaster website (r=.205); Steaming site (r=.188); Youtube (r=.231); Facebook (r=.183); snapchat (r=.177); mobile app (r=.282); league website (r=.176); Fantasy league and prediction games (r=.197) and **F2: social interaction motivation.**
  - Live TV (r=.156); Facebook (r=.176); Twitter (r=.251); Instagram (r=.215); news website (r=.279); league or tournament website (r=.261); Fantasy League and prediction games (r=.260) and **F3: convenience and control**
  - Broadcaster website (r=.257); streaming sites (r=.280); mobile app (r=.250) and **F4: Value for money and Affordability**
  - Broadcaster website (r=.211); streaming sites (r=.184); YouTube (r=.275) mobile app (r=.205); league or tournament website (r=.170) and **F5: Customisation and Entertainment**

- A moderate positive relationship between:
  - Broadcaster website (r=.309); YouTube (r=.399); mobile app (r=.306) and **F1: personal interest and preference**
  - Broadcaster website (r=.452); streaming site (r=.374); YouTube (r=.436); mobile app (r=.383) and **F3: convenience and control**
  - YouTube (r=.319) and **F4: Value for money and Affordability**

TABLE 5.10: FREQUENCY OF SPORTS VIEWERSHIP ON VARIOUS MEDIA TYPES

Media Type	Unit	Factor1	Factor2	Factor3	Factor4	Factor5
S2.7.1 Live TV	Pearson Correlation	0.072	0.040	.156*	-0.060	-0.014
	Sig. (2-tailed)	0.350	0.607	0.043	0.441	0.854
	N	170	170	170	170	170
S2.7.2 Broadcaster website	Pearson Correlation	**.309****	.205**	**.452****	.257**	.211**
	Sig. (2-tailed)	0.000	0.007	0.000	0.001	0.005
	N	173	173	173	173	173
S2.7.3 Streaming sites	Pearson Correlation	.257**	.188*	**.374****	.280**	.184*
	Sig. (2-tailed)	0.001	0.014	0.000	0.000	0.016
	N	172	172	172	172	172
S2.7.4 YouTube	Pearson Correlation	**.399****	.231**	**.436****	**.319****	.275**
	Sig. (2-tailed)	0.000	0.002	0.000	0.000	0.000
	N	175	175	175	175	175
S2.7.5 Facebook	Pearson Correlation	.170*	.183*	.176*	0.059	0.068
	Sig. (2-tailed)	0.027	0.017	0.021	0.443	0.380
	N	171	171	171	171	171
S2.7.6 Twitter	Pearson Correlation	.154*	0.138	.251**	0.059	0.075
	Sig. (2-tailed)	0.043	0.071	0.001	0.437	0.330
	N	173	173	173	173	173
S2.7.7 Instagram	Pearson Correlation	.150*	0.090	.215**	-0.003	0.071
	Sig. (2-tailed)	0.048	0.237	0.004	0.968	0.354
	N	174	174	174	174	174
S2.7.8 Snapchat	Pearson Correlation	-0.006	.177*	-0.018	-0.021	0.052
	Sig. (2-tailed)	0.935	0.021	0.816	0.786	0.500
	N	170	170	170	170	170
S2.7.9 News websites	Pearson Correlation	.279**	0.123	.279**	0.091	0.047
	Sig. (2-tailed)	0.000	0.108	0.000	0.237	0.544
	N	172	172	172	172	172
S2.7.10 Mobile app	Pearson Correlation	**.306****	.282**	**.383****	.250**	.205**
	Sig. (2-tailed)	0.000	0.000	0.000	0.001	0.007
	N	174	174	174	174	174
S2.7.11 League or tournament websites	Pearson Correlation	.266**	.176*	.261**	0.118	.170*
	Sig. (2-tailed)	0.000	0.021	0.001	0.121	0.025
	N	173	173	173	173	173
S2.7.12 Fantasy league and prediction games	Pearson Correlation	.176*	.197**	.260**	0.107	0.113
	Sig. (2-tailed)	0.021	0.010	0.001	0.165	0.142
	N	171	171	171	171	171

5.5.2 Comparison Of The Duration Of Sports Viewing With Motivations To Consume Sport Content Online (Objective 3.2)

Table 5.11 presents the correlations between duration of sports viewing and to consume sports online that produced limited evidence of medium or strong correlations for any alternative. The results however unveil that a weak negative exists between "5-10 minute highlights" and the **F2: Social Interaction Motivation.**

TABLE 5.11: DURATION OF SPORTS VIEWERSHIP

Duration	Unit	Factor1	Factor2	Factor3	F5_Factor4	F5_Factor5
S2.8.1 **Full match**	Pearson Correlation	-0.023	-0.066	0.045	-0.033	-0.045
	Sig. (2-tailed)	0.767	0.383	0.555	0.667	0.550
	N	176	176	176	176	176
S2.8.2 **15-30-minute extended highlights**	Pearson Correlation	0.100	-0.079	0.116	0.123	0.018
	Sig. (2-tailed)	0.188	0.297	0.127	0.105	0.811
	N	176	176	176	176	176
S2.8.3 **5-10-minute highlights**	Pearson Correlation	-0.016	-.208**	0.069	-0.067	0.038
	Sig. (2-tailed)	0.830	0.006	0.360	0.374	0.614
	N	176	176	176	176	176
S2.8.4 **2-4-minute clips**	Pearson Correlation	0.136	0.079	0.005	0.045	0.021
	Sig. (2-tailed)	0.072	0.296	0.953	0.549	0.785
	N	176	176	176	176	176
S2.8.5 **Up to 1-minute clips**	Pearson Correlation	-0.095	0.020	-0.085	-0.024	-0.048
	Sig. (2-tailed)	0.210	0.795	0.263	0.749	0.529
	N	176	176	176	176	176
S2.8.6 **Magazine shows**	Pearson Correlation	-0.042	0.069	-0.089	-0.101	0.011
	Sig. (2-tailed)	0.584	0.360	0.242	0.184	0.883
	N	176	176	176	176	176
S2.8.7 **Documentaries**	Pearson Correlation	-0.025	0.087	0.033	0.092	-0.010
	Sig. (2-tailed)	0.742	0.250	0.662	0.225	0.896
	N	176	176	176	176	176

5.6 CONCLUSION

A statistically sufficient number (n≥150) of valid responses (n=176) (Wegner, 2016) were attained for the study that were useful to proceed with statistical analysis. A representative gender sample was achieved that aligns with South African sport studies (Kantar TNS, 2017). The Millennial age breakdown was grouped into younger and older Millennials. A reasonable representation of Gauteng population groups participated in the study, with an under representation of Blacks and over representation of White considering the population profile. Household income groups were relatively equally represented with low (R30 000 or less), middle (R30 000 – R50 000) and high-income groups (more than R50 000), indicating that the respondents in the sample could probably afford various media for sports consumption. Overall, the sample was acceptable to make inferences of the target population although the sample and sample size were not representative of the population.

Results confirm that there is an avid interest in sport viewership, with majority of sport viewership being daily or weekly and the preferred media type remaining Live TV, while streaming live on broadcaster websites is secondary.

Upon scrutiny of the content from the factor extrusion and related Cronbach's Alpha, the five-factor extraction was observed as the most acceptable outcome. The factors were renamed as follows:

Factor 1: Personal interest and preference (12 items)
Factor 2: Social interaction motivation (7 items)
Factor 3: Convenience and control (6 items)
Factor 4: Value for money and Affordability (7 items)
Factor 5: Customisation and Entertainment (5 items)

The mean values reflected that Millennials *strongly agree* that **F3: Convenience And Control** and *agree,* that **F1: Personal Interest And Preference** motivate them to consume sport content online, with **F2: Social Interaction being** least imperative.

Significant differences among demographic groups mostly occurred for **F2: Social Interaction And Motivation,** indicating that this motivation is significantly stronger among men than women ($p<0.05$)**,** and significantly stronger ($p<0.05$) among Blacks compared to Whites, as well as Coloureds compared to Whites.

Finally, the correlational analysis revealed that the frequency of sport viewership media types is driven by media that enable, **F1: Personal Interest And Preference**, **F3: Convenience And Control** and provide **F4: Value for Money and Affordability**. Results show a weak negative relationship existing between "5-10-minute highlights" and **F2: Social Interaction And Motivation**, perhaps reflecting that Millennials generally want to remain informed and avoid FOMO to enable interaction with peers.

Chapter 6 provides a discussion of the results presented in chapter 5, using evidence from literature to confirm or question findings.

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CHAPTER 6

DISCUSSION OF RESULTS

CHAPTER 6: DISCUSSION OF RESULTS

6.1 INTRODUCTION

This chapter presents a discussion of the research research results, endeavouring to link the findings with existing theories and literature. A presentation of how the original aims of the study have been met, is incorporated into the discussions that are structured by first describing the profile of the sample, followed by the findings pertaining to the motivations that spur Millennials' online sports consumption. This is distinguished in terms of their demographic characteristics and related to their sports consumption behaviour.

6.1.1 Aim Of The Study

The study attempted to investigate and provide empirical evidence of the online sports consumption behaviour of a specific demographic group, namely the Millennial age cohort in South Africa, as a viable future market segment. Specific attention is given to their underlying motivations for consuming sport content online, aiming to indicate the relationship between the independent- (utilitarian motivations) and dependent variables (consumption of online sport content) to account for the forces that influence certain behavioural outcomes, to enable traditional service providers to better serve consumers' sport viewing needs in the future.

6.2 DEMOGRAPHIC DESCRIPTIONS

By analysing the demographic characteristics of the sample, the researcher was able to understand whether Millennials who participated in the study, sufficiently represented Millennial sports enthusiasts who reside in Gauteng, to subsequently merit useful and reliable inferences from the findings.

6.2.1 Gender

For the purpose of the study, a deliberate gender bias towards male respondents was sought. The sample eventually comprised of 71.0% (n=125) male, and 29.0% (n=51) female respondents after exclusion of those who did not qualify in terms of the pre-requisites, or whose questionnaires were doubted for some reason as explained in Chapter 5. The gender representation achieved, is consistent with sports studies in the

South African context (Kantar TNS, 2017) and although results are skewed towards males, females are not necessarily under represented, as sport has been proven to resonate more strongly with males than the female audience in general.

6.2.2 Age

The study defined Millennial age cohort to individuals born between 1984 and 1998, thus between the ages of 20 - 35 years of age at the time of the study (Lantos, 2014). The sample consisted of 46.6% younger Millennials (20 – 29 year olds) and 53.4% older Millennials (30 – 35 year olds). The skew towards older Millennial participants can be ascribed to the sampling method that was purposive but non-random (Zikmund et al., 2013). Also, it was observed that older Millennials respondents participated early in the study and snowballed to their peers who were of similar age. Younger Millennials had to be sought intentionally on social media, which showed a low survey completion rate. A few commented on social media that data costs were an in terms of completing the survey: 7 – 10 minutes of Internet access was required.

6.2.3 Household Income

Household income groups were relatively equally represented indicating lower- (R30 000 or less), middle- (R30 000 – R50 000) and high-income groups (more than R50 000) in terms of monthly household income. Higher incomes indicated a probability that the sample could afford various media for sports consumption. Therefore, the study was not necessarily interested in the lowest income households. Under resourced and financially savvy Millennials are constantly searching for the best prices, freebies, discounts, the opportunity for sharing, as well as free WIFI hotspots (Egan et al., 2018), which sheds light on the how Millennials choose to spend, what they perceive as valuable and how they can make a plan to bypass the system to gain the most from every interaction and experience.

6.2.4 Population Groups

A reasonable representation of population groups in Gauteng was included in the study, with an under representation of Blacks (by 35.7%) an over representation of Whites (by 15.4%), Coloureds (by 16.3%) and Indians/ Asians (by 6.2%). Having a non-representative sample, has implications for the generalisability of the research findings. However, Egan et al., (2018) suggest that the Millennial cohort identifies more closely with one another than any generation before them, due to their group interactions with a diverse group of peers (Dotson et al., 2013) as well as their exposure and influence from

their 'global citizenship', thanks to the internet and social media., an under representation of certain population groups may therefore be a less serious problem, in the context of this study.

6.2.5 Summary

The sample comprised of more males than females, which was preferable, as well as an acceptable representation of different household incomes considering that the lowest household income groups may not have been able to contribute much to the study due to lack of access to online media, as well as lack of access to suitable technology to access online sports platforms, and even pay TV. Despite an under representation of Black Millennials, they were in the majority. The study was also fortunate to include a sizable number of Coloured respondents. The sample is nevertheless not representative of the population of Gauteng, mostly due to the sampling method that was restricted by financial and time limitations.

6.3 SPORT VIEWERSHIP BEHAVIOUR OF THE SAMPLE (OBJECTIVE 1)

The first objective of the study was to establish the sports viewing behaviour of respondents i.e.: an investigation of Millennials' online sport consumption in terms of: (1.1) frequency of sports viewership, (1.2) duration of sports viewership, and (1.3) media used. The aim was to get a general idea of Millennials current sports viewing behaviours, their level of access and exposure to online sports content sources. Also relevant, was the duration of their sports consumption, which could indicate emerging viewership trends that could be capitalised on by sport content providers.

6.3.1 Frequency Of Sport Viewership

The results from the statistical analysis confirmed that there are three major clusters of sports viewers, those who view sport daily (the regulars) (46.6% / n = 82); those who view sport weekly (the fairly frequent viewers), (31.3% / n = 55); while the remainder and notably smallest group, included casual viewers who watch sport monthly or occasionally (22.2% / n = 39). This confirms that a sport viewership culture is prevalent among South African Millennials. This affirms that there is an appetite for sport broadcasting and that Millennials are a viable market segment to provide sport content services to - now and into the future. This cements the studies by Fujak, et al., (2017), namely that sports content continues to remain highly desirable for advertisers and sponsors, due to its

perishability and subsequent high demand for live viewership. The ongoing consumption potential of the Millennial cohort will increase as their purchasing power grows in the future and their desire for sport content increases, confirmed by Duh and Struwig (2015) who estimate that South African Millennials' purchasing power is approximately R93 billion annually and growing as they enter the workforce.

6.3.2 Media Type Preference For Sport Content Consumption

The results indicate that watching a match on Live TV is Millennials' preferred medium to consume sport content. This was an interesting discovery as extant research increasingly suggests that the proliferation of an increasingly digitised media ecosystem has liberated viewing audiences to access content from a plethora of online modes, as well as that Millennials are progressively cord cutting and thus moving away from traditional TV providers (Fuduric, et al., 2018). This may shed light however, on why the second most preferred medium is broadcasters' websites, which is the online or streaming version of the TV or linear broadcast. This indicates a strong migration to online sources.

The third preferred medium to watch sports content, was news websites, suggesting that there is a desire for more detailed information on their favourite sports and leagues. Millennials could also be using the news sites to access credible editorial content on sports they do not have access to on television, or they may be streaming to gain an in-depth analysis of matches that were played.

Streaming websites and apps are fourth preferred. These are generally illegal streaming sites, again reinforcing the progressive migration to online sources and now notably, free or more cost-effective OTT providers. This finding has major implications for traditional TV providers, with ICASA (2018) remarking that "traditional FTA TV and particularly Pay TV services in SA are under threat" (ICASA, 2018, p.1). These service providers face competition from both local and more formidably international audio-visual electronics giants such as Netflix, Amazon Prime Video, Apple, Google/YouTube and Facebook.

YouTube is the fifth preferred medium to view sports content, which generally presents highlights with quick turnaround time from live broadcast. Sixth, is mobile sports app's, which would encompass both news content and highlight clips.

Social media sources received on average, a low preference, with Twitter (seventh) seemingly the better content over other media platforms such as Facebook (tenth), Instagram (eleventh) and Snapchat (least preferred). This finding is rather thought-provoking due to Millennials' desperate avoidance of FOMO – the fear of missing out - (Egan et al, 2018) and desire to remain relevant. It was expected that social media would feature much higher in preference.

Prediction games are eighth, which indicates the preference over other social media types for engagement with league and tournament websites (ninth), indicating that local broadcaster websites and news sites are perceived to be a better source of information as they tend to publish objective editorial content and are an aggregator of a variety of sports compared to a single league or tournament site.

6.3.3 Preferred Duration Of Sports Content

Research revealed that Millennials' first preference for sports consumption is a full live match. Their second preference, is 5 – 10-minute highlights, and third are 15 – 30-minute highlights. This implies that, despite Millennials' keen attraction to cord cutting (Fuduric et al., 2018), their needs and consumption behaviours are alike older generations, in that sport viewing is best consumed as it happens. Deninger (2012, as cited by Fujak, Frawley and Bush, 2017, p.106) confirms that "90% of viewers who watch a sport broadcast, will do so live".

6.3.4 Summary Of Findings

The findings were surprising, revealing that Millennial sport enthusiasts appear to be driven by their passion for sport and not just the need to remain relevant and to avoid FOMO. This can be seen through the frequency of viewership, with the majority being serious and regular viewers as well as their preference to still watch a full live match on TV. It is noted however, that online sources are being adopted and utilised steadily to fulfil their sport consumption needs.

These findings are important for traditional broadcasters. Paul and Weinbach (2015) explain that sports broadcasting remains one of the limited types of programmes that constantly receive the highest viewership ratings. Pay TV providers in South Africa such as MultiChoice cannot ignore the importance of sport presentation to the Millennial audience and should continue to build an online ecosystem that can aptly serve this cohort as they gradually migrate to online sources.

6.4 MILLENNIALS' MOTIVATION TO CONSUME SPORT CONTENT ONLINE (OBJECTIVE 2)

The next objective of the research was to investigate and describe Millennials' motivation to consume sports content online, specifically discriminating the strength of different motivational factors (2.1), discriminating significant demographic differences including gender, age, household income and population group differences within the Millennial age cohort.

6.4.1 The Strength Of Different Motivational Factors In Terms Of Online Sport Content Consumption (Objective 2.1)

As an outcome of the Exploratory Factor Analysis that was performed on the seven-dimensional (motivations) scale (Annexure 1) that was used to survey the sample, the factor extrusion and related Cronbach Alpha's directed the outcome towards a five factor/ dimensional scale, allowing for better interpretation of the factor loadings (Pallant, 2013, p.183).

The factors were subsequently named to appropriately describe the items that constitute each factor, and were labelled as follows:

Factor 1: Personal interest and preference (12 items)

Factor 2: Social interaction motivation (7 items)

Factor 3: Convenience and control (6 items)

Factor 4: Value for money and Affordability (7 items)

Factor 5: Customisation and Entertainment (5 items)

6.4.1.1 Factor 1: Personal interest and preference

It was evident that one of the motivations for Millennials' sports viewing experience, was to prioritise it in a way that fits their unique needs and preferences. Some of the items contained in the factor refer to descriptors that indicate the Millennial viewer curating the content and viewing experience as follows:

- Preference of frequency of viewership - "I am able to control my frequency of consumption",
- Viewing only preferred genre of sport and teams - "online I can choose or customize only the sport and teams that interest me",
- Preference over content - "online, I have the option to consume only the sport content and team that interest me"

- Control of time - "watching sport content online allows me to watch whenever I want"
- Preference of viewing format - "I watch sport content online because of the variety of sports content that are available in formats I like"

Based on the means that were calculated for the five factors, **Factor1: Personal interest and preference** (M = 3.90) is a relatively strong motivation, and the second strongest motivation for consuming sport content online. Millennials are therefore keen to structure their viewing according to their personal preferences. This concurs with previous research by Cha (2013) who indicates that due to functional displacement, which occurs when new media is introduced, that has similar functions and advantages over an existing medium, that serves the same purpose, the new medium will inevitably displace the old. As such, the Internet is a functional alternative to traditional TV, it also offers viewers superior content, with the ability to curated content to an individual's personal preferences without time limitations and with better technical and cost benefits (Lee & Lee, 2015).

6.4.1.2 Factor 2: Social interaction motivation

The items in the social interaction factor suggest that consuming sport content online is important as it adds value in terms of a sense of belongingness and to gain better insight from experts and other fans, for example: "What I value by consuming sport online is the availability of information from the sports commentators as well as other sport fans" into this factor.

Based on the means that were calculated for the five factors, **Factor 2: Social interaction motivation** (M = 3.12) is the weakest motivation to consume sports content online. Millennials do therefore not divert to online sports consumption with the expectation that it would enhance social interaction. This finding is contradictory to literature where Egan et al. (2018) reports that Millennial's are following sports matches online or through social media platforms simply to avoid having FOMO and resultant isolation due to the absence of information that friends have and that they do not.

6.4.1.3 Factor 3: Convenience and control

The items contained in this construct suggest that what consumers value about online sports consumption, include a number of issues relating to comfort, including services tailored to their needs, having readily available information as well as the desire for control over their viewing entertainment.

Based on the means that were calculated for the five factors, **Factor 3: Convenience and control** (M = 4.04) is the strongest motivation to consume sports content online. Millennials will therefore switch to online platforms to experience convenience and a sense of control, not being dictated by fixed programme schedules, lengthy advertisements, etc. This concurs with previous research by Wong (2016), indicating that Millennials expect to have access to live sports as an event happens, this need for instant gratification has driven the proliferation of sports broadcast piracy, via internet streaming. Sport viewing adoption rates far exceeds other viewing entertainment as it has the ability to transcend social, cultural and linguistic barriers, thus making the content highly valuable for commercial advertisers and broadcasters. It should be noted as a cause for concern for these commercial parties if Millennials are circumventing legal sources of sport content to achieve higher levels of convenience and control, due to the implications of reduced revenues for all involved.

6.4.1.4 Factor 4: Value For Money And Affordability

This factor contains items from the "Utilitarian Motivation Scale" by Martinez-Lopez, et al., (2014): merging descriptors relating to desire for control, variety of content and availability of information. Millennials hence seem to value consuming sport content online as it is cost effective and perceived to be good value for money, as some items demonstrate below:

- Saving - *I save a lot by consuming sport content online*
- Value for money - *Consuming sport content online is good value for money*
- Only pay for what you want to consume - *I watch sport content online because there I can get what I want*
- Free alternatives - *By using affordable or free alternatives online I feel in control of my sport content consumption*
- Availability of alternatives - *Financially, the availability of different media sources is beneficial to me in terms of my sport content consumption*
- Availability of alternatives - *Online sport content sources provide me with the kind of decision-making information that I did not have access to before.*

Based on the means that were calculated for the five factors, **Factor 4: Value for money and affordability** (M=3.71), is a fairly strong motivational factor although less prevalent than *Personal interest and preference*, as well as *Convenience and control* (the strongest motivation). Monetary implications are therefore less important than to have control over the sports viewing experience and to experience convenience. This finding is confirmed

by an ICASA (2018) publication, where Telecommunication data reports that 58% of data consumption in 2015 was of online video content. Consumers' access to broadband and connected mobile devices has increased consumer adoption of streaming services. Mobile subscription in South Africa stands at 88 million users, of which 25 million are for smartphones. The phenomenal growth in mobile data usage and the consumption of electronic audio-visual content online in SA demonstrate that broadband speeds and data costs are not a barrier to the adoption of OTT services in SA (ICASA, 2018).

6.4.1.5 Factor 5: Customisation and Entertainment

Factor five suggests that Millennials view sport online as a pastime although it also provides opportunity to shape their viewing experience according to their needs, this is a moderately strong motivation to consume sports content online based on the means that were calculated for the five factors, **Factor 5: Customisation and Entertainment (M=3.42),** although not a pertinently strong motivation. The finding is rather underwhelming as sport content usually provokes a rather strong response from sport enthusiasts attributed to the findings by Funk et al. (2012) that describes that a unique set of drivers that are based on experiences, socio-cultural rearing and personality of the spectator, sport fulfills an individual's desire "for positive stress and psychological arousal, referred to as Eustress" (measured by Wann, 1995, as cited by Funk et al., 2012, p.358). Several other notable sport fans' needs - fulfilled through sport spectatorship - include facets of escapism, positive stress, entertainment, self-esteem enhancement, sense of belonging, positive social interaction, fan identification, sense of risk-taking, and significance of affiliation amongst others (Stavros et al., 2014).

6.4.2 Summary Of The Findings

Based on the means that were calculated for the five factors, **Convenience and control** is the strongest motivation to consume sports content online. Millennials will therefore switch to online platforms to experience convenience and a sense of control, not being dictated by fixed programme schedules, lengthy advertisements, etc. **Personal interest and preference** is a relatively strong motivation, and the second strongest motivation for consuming sports content online. Millennials are therefore keen to structure their viewing according to their personal interests. **Value for money and affordability** is another, fairly strong motivational factor although less prevalent than the former. **Customisation and Entertainment** is a moderately strong motivation to consume sports content online although not a pertinently strong motivation. Least prevalent, is the

motive for **Social interaction motivation,** which was found to be the weakest motivation to consume sports content online.

The findings imply that Millennials find online sport consumption sources highly desirable, due to functional displacement the new technology offers superior, they may be driven to illegal sources of content, due to the ease of access of content online. It appears that cost of broadband is not a barrier to access for Millennials and is perceived as value for money as many of these sources are at a reduced cost online if not free. The motivation to consume content online as a means of entertainment and social interaction, appears as moderate and weak drivers respectively, these were surprising findings as research documents sport as eliciting and fulfilling many social needs, with online mediums enabling these connections easily.

6.4.3 Demographic Differences In Millennials' Motivation To Consume Sport Content Online (Objective 2.2)

Based on evidence in literature, of demographic differences in online sports viewing (Kantar TNS, 2017), the study also sought to investigate if there were any significant demographic differences (gender age, household income and population group) in motivation among Millennials in the sample investigated. The aim of the findings was to highlight demographic nuances that sport content providers could leverage and potentially increase their efforts when targeting specific Millennial sub-groups.

6.4.3.1 Gender Differences

Because the group sizes were very different and some of the variables were not normally distributed, a non-parametric test had to be conducted to extract significant differences between the groups (Pallant, 2013, p.220). The results were interpreted with caution, because the group sizes were not similar and could not be regrouped because gender is classified as categorical data. By analysing the means of the results, it became clear that both males' and female' motivation to consume sports content online, only differed for one of the five dimensions, namely for *Factor 2: Social interaction motivation*, where males' motivation was significantly stronger ($p<0.05$) to achieve social affiliation through these online platforms. Notwithstanding, this motivation was not particularly strong.

Contributing factors for the significant differences may include the group sizes differed significantly, with a much larger number of male respondents, who characteristically are more regular and therefore avid consumers of sport content (Kantar TNS, 2017).

6.4.3.2 Age differences

The only factor where significant differences (p<0.05) between the two age categories (younger and older Millennials) could be confirmed, was for **Factor 2: Social interaction motivation**, indicating that the younger category aged <30 years, are significantly more motivated (p = 0.01) hereby (M = 3.30) than their older counterparts (M =2.96). For both, this was nevertheless the weakest motivation to view sports content online. Differences for the other four factors were not statistically significant (p>0.05).

A possible explanation for this could be attributed to younger Millennials being driven by a sense of belonging from peer groups, compared to older Millennials who may be more secure in their social circles due to maturity. Egan et al., (2018), confirm that many Millennials are under pressure to keep up with trends and remain informed as well as portray a particular persona as a result of social media influences. All of this is to remain relevant in various circles, being highly driven by peer pressure, many are only on social media to avoid having FOMO.

6.4.3.3 Household Income differences

The only factor where significant differences (p<0.05) could be confirmed, was for **F2: Social Interaction Motivation** (p = 0.00). In particular, the lowest household income group (R30,000 or less) is significantly more motivated by the potential that online sports consumption will enhance **F2: Social Interaction,** than the highest income level (>R50,000; M=2.88). Differences between the low and middle-income categories were not significant (p>0.05) and the same applied for the middle and the highest income category.

This could be explained by the limited resources and disposable income and therefore access to sport on traditional Pay TV. Access to premium sports viewing content and variety of sports content may be limited to this lower income group, therefore not having access to the amount of information that more affluent Millennials may have. Therefore, they may be more highly motivated to consume sport content online by whatever means necessary including pirated sites which have no cost barriers to entry (Wong, 2016).

6.4.3.4 Population group differences

The only factor where significant population differences existed, was for **F2: Social Interaction.** Results indicate that there are no significant household population group (p>0.05) in Millennials' motivation to watch sport online as a consequence of any of the

other motivational factors, namely: F1: Personal Interest and Preference, F3: Convenience and Control, F4: Value for Money and Affordability, and F5: Customisation and Entertainment.

There are significant differences in the sense that Black sports viewers are significantly more motivated (M =3.34) than White sports enthusiasts (M =2.79) (p<0.05) with the possibility that online sports viewing could enhance social interaction. Also, online sports viewers (M =3.17) are significantly more motivated (p = 0.019) by social benefits than Whites (M = 2.79). The differences between Black and Coloured viewers is not significant (p>0.05); and the same applies for the difference between the Coloured and the Indian/ Asian group. Overall, social benefits as a motivation for online sports viewing was the strongest among Black sports viewers, although only a moderately strong motivation.

An example of a growing trend that could explain this significant difference is Black Twitter. This activity of Twitter users' personal accounts, conversing whilst TV programming is screening can be more popular than just viewing the TV shows alone. This means the 'social' may actually become the primary content driver and the TV show itself a secondary driver (Egan, et al., 2018). This could be one explanation for the social motivation being strongest with Black sports viewers.

The findings reveal that, only the social interaction motivation had statistically significant differences between different demographic groups. However, this motivation was consistently the weakest factor for online sport consumption for all demographic groups. This could possibly indicate that Millennials do have subgroups within the cohort that are influenced more strongly by modern trends such as FOMO, income differences and cultural heritage that divides their behaviours.

6.5 COMPARISON OF MILLENNIALS' MOTIVATION TO CONSUME SPORT CONTENT ONLINE (OBJECTIVE 3)

The next objective of the research was to correlate Millennials' motivation to consume sport content online, specifically the frequency of sports viewership on different media types (3.1) and duration of sports viewership (3.2) with each motivational factor within the Millennial age cohort.

6.5.1 Comparison Of The Frequency Of Sports Viewership On Different Media Types With Motivation To Consume Sport Content Online (Objective 3.1)

The correlations between each media type and the five motivational factors, reveals a void of a strong correlation between any of the media type frequencies and motivational factors. [Broadcaster website (r=.309); YouTube (r=.399); mobile app (r=.306) and **F1: personal interest and preference.** Broadcaster website (r=.452); streaming site (r=.374); YouTube (r=.436); mobile app (r=.383) and **F3: convenience and control.** YouTube (r=.319) and **F4: Value for money and Affordability**]

Only three factors displayed a moderate relationship between what appears to be the most popular mediums, these are Broadcaster websites, streaming sites, YouTube, and mobile app's, which are also coincidentally sources that provide live or near live matches and 5-10 minute highlights. Notably all social media as media for consumption were absent and so were the social motivation as well as customisation and entertainment motivations. A possible explanation again, could be attributed to the nature of sport content being perishable in nature, sport viewing is best consumed as it happens. Deninger (2012, as cited by Fujak, Frawley, & Bush, 2017, p.106) confirm that "90% of viewers who watch a sport broadcast, will do so live".

6.5.2 Comparison Of The Duration Of Sports Viewership With Motivation To Consume Sport Content Online (Objective 3.2)

The correlations between the duration of sports viewing and motivation to consume sports online, resulted in limited evidence of any medium and strong correlations for any of the alternative motivations. The results however unveiled that a weak negative relationship exists between "5-10 minute highlights" and the **F2: Social Interaction Motivation.** The findings were unexpected, but FOMO may offer a possible explanation, where Millennials simply watch the 5-10 minute highlights simply to remain relevant in their social circles.

6.6 SUMMARY OF THE DISCUSSION

The findings reveal that Millennials are motivated to consume sport content online to an extent, as the functional displacement of traditional television by the superior functionality and benefits that can be gained by consuming content online is attractive. Motivations that may spur Millennials to use online options for sports consumption, is firstly,

convenience and control that are characteristics that are typical of Millennials. Other attractive motivations, are opportunity for personalisation, affordability, as well as value for money and entertainment. Generally, social interaction is not a pertinent motivation for online sports consumption.

It is apparent **that Millennials are influenced by various trends within their** demographic **subgroups** with a heightened **desire to remain relevant. Some trends that are driving this behaviour, include FOMO, Black Twitter, illegal streaming and piracy of content.** Apparently, Millennials still want to watch sport content live, with a moderate relationship between what appears the most popular media, namely Broadcaster websites, streaming sites, YouTube, and mobile apps that also coincidentally provide full live or near live matches and highlights

Chapter 7 presents the conclusion of the study, recapping the objectives, providing recommendations, possible implications, limitations and suggestions for future research.

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CHAPTER 7

CONCLUSION

CHAPTER 7: CONCLUSION

7.1 INTRODUCTION

The study attempted to investigate and provide empirical evidence of the online sports consumption behaviour of a specific demographic group, namely the Millennial age cohort in South Africa, as a viable future market segment. Specific attention is given to their underlying motivations for consuming sport content online, aiming to indicate the relationship between the independent- (utilitarian motivations) and dependent variables (consumption of online sport content) to account for the forces that influence certain behavioural outcomes, to enable traditional service providers to better serve consumers' sport viewing needs in the future.

This chapter will review the study's objectives, followed by a summary of the key findings, providing recommendations, possible implications for business and theoretically, suggestions for future research as well as limitations that were experienced.

7.2 REVIEW OF THE RESEARCH OBJECTIVES

The following objectives were formulated to address the aim of the study:

1. To investigate and describe Millennials' online sport consumption in terms of:
    1.1 frequency of sports viewership, and
    1.2 duration of sports viewership
    1.3 media used
2. To investigate and describe Millennials' motivation to consume sport content online:
    2.1 discriminating the strength of different motivational factors
    2.2 discriminating significant demographic differences (gender, age, household income and population group differences) in motivation within the Millennial age cohort.
3. To compare Millennials' motivation to consume sport content online in terms of:
    3.1 the frequency of their sports viewership, and
    3.2 duration of sports viewership. correlate

7.3 SUMMARY OF THE FINDINGS

The demographic composition of the sample was presented first, to understand if the sample was representative of the target population to allow the inference of generalisable

findings. The sample comprised of more males than females, which was preferable, as well as a good representation of different household incomes considering that the lowest household income groups may not have been able to contribute much to the study due to lack of access to online media, as well as lack of access to suitable technology to access online sports platforms, and even pay TV. Despite an under representation of Black Millennials, they were in the majority. The study was also fortunate to include a sizable number of Coloured respondents. The sample is nevertheless not representative of the population of Gauteng, mostly due to the sampling method that was restricted by financial and time limitations.

Objective 1

The first objective of the study was to establish the sports viewing behaviour of respondents i.e.: an investigation of Millennials' online sport consumption in terms of: (1.1) frequency of sports viewership, (1.2) duration of sports viewership, and (1.3) media used. The aim was to get a general idea of Millennials current sports viewing behaviours, their level of access and exposure to online sports content sources. Also, relevant, was the duration of their sports consumption, which cold indicate emerging viewership trends that could be capitalised on by sport content providers.

The findings were surprising, revealing that Millennial sports enthusiasts appear to be driven by their passion for sport and not just the need to remain relevant and to avoid FOMO. This can be seen through the frequency of viewership, with the majority being serious and regular viewers as well as their preference to still watch a full live match on TV. It is noted however, that online sources are being adopted and utilised to fulfil their sport consumption needs.

These findings are important for traditional broadcasters. Paul and Weinbach (2015) explain that sports broadcasting remains one of the limited types of programmes that constantly receive the highest viewership ratings. Pay TV providers in South Africa such as MultiChoice cannot ignore the importance of sport presentation to the Millennial audience and should continue to build an online ecosystem that can aptly serve this cohort as they gradually migrate to online sources.

Objective 2

The next objective of the research was to investigate and describe Millennials' motivation to consume sports content online, specifically discriminating the strength of different motivational factors (2.1), discriminating significant demographic differences including gender, age, household income and population group differences (2.2) within the Millennial age cohort.

Objective 2.1

As an outcome of the Exploratory Factor Analysis that was performed on the seven-dimensional (motivations) scale (Annexure 1) that was used to survey the sample, the factor extrusion and related Cronbach Alpha's directed the outcome towards a five factor/ dimensional scale, allowing for better interpretation of the factor loadings in the context of this study (Pallant, 2013, p.183).

The factors were subsequently named to appropriately describe the items that constitute each factor, and were labelled as follows:

> **Factor 1:** Personal interest and preference (12 items)
>
> **Factor 2:** Social interaction motivation (7 items)
>
> **Factor 3:** Convenience and control (6 items)
>
> **Factor 4:** Value for money and Affordability (7 items)
>
> **Factor 5:** Customisation and Entertainment (5 items)

Based on the means that were calculated for the five factors, **Convenience and control** is the strongest motivation to consume sports content online. Millennials will therefore switch to online platforms to experience convenience and a sense of control, not being dictated by fixed programme schedules, lengthy advertisements, etc. However, the researcher highlights implications for exiting broadcasters confirmed by Wong (2016), that Millennials are increasingly adopting avenues such as "piracy" to meet their instant gratification needs, which has implications of reduced revenues for all commercial parties involved.

Personal interest and preference is a relatively strong motivation, and the second strongest motivation for consuming sports content online. Millennials are therefore keen to structure their viewing according to their personal interests. The adoption of online consumption will increase, described by the functional displacement phenomenon described by Cha (2013) where the adoption of new media is inevitable if the functionality

offers significant advantages over the existing medium. As such, the Internet is a functional alternative to traditional TV, it also offers viewers superior content, with the ability to curated content to an individual's personal preferences without time limitations and with better technical and cost benefits (Lee & Lee, 2015).

Value for money and affordability is another, fairly strong motivational factor although less prevalent than the former. This finding is confirmed by an ICASA (2018) publication, where Telecommunication data reports that 58% of data consumption in 2015 was of online video content. It appears that consumers' access to broadband and connected mobile devices has increased consumer adoption of streaming services. Confirming that mobile data and broadband costs are not a barrier to the adoption of OTT services in SA (ICASA, 2018).

Customisation and Entertainment is a moderately strong motivation to consume sports content online although not a pertinently strong motivation. The finding is rather underwhelming as sport content usually provokes a rather strong response from sport enthusiasts attributed to the findings by Funk et al. (2012) that describes how sport fulfills an individual's desire "for positive stress and psychological arousal, referred to as Eustress" (measured by Wann, 1995, as cited by Funk et al., 2012, p.358). Several other notable sport fan needs - fulfilled through sport spectatorship - include facets of escapism, positive stress, entertainment, self-esteem enhancement, sense of belonging, positive social interaction, fan identification, sense of risk-taking, and significance of affiliation amongst others (Stavros et al., 2014).

Least prevalent, is the motive for **Social Interaction,** which was found to be the weakest motivation to consume sports content online. This finding is surprising as it is contradictory to literature where Egan et al. (2018) reports that Millennials are following sports matches online or through social media platforms simply to avoid having FOMO and resultant isolation due to the absence of information that friends have and that they do not.

Objective 2.2
Based on evidence in literature, of demographic differences in online sports viewing (Kantar TNS, 2017), the study also sought to investigate if there were any significant demographic differences (gender, age, household income and population group) in motivation among Millennials in the sample investigated. The aim of the findings was to highlight demographic nuances that sport content providers could leverage and to potentially increase their efforts when targeting specific Millennial sub-groups.

The findings reveal that *social interaction motivation* was the only motivational factor where statistically significant differences were detected. However, this motivation was not a particularly strong motivation for any of the groups. The results reveal that males' motivation was significantly stronger, but this result could be contributed the much larger number of male respondents (Kantar TNS, 2017). Younger Millennials appear to be more motivated to use online platforms to enhance social interaction than older Millennials, with a possible contributing factor, being their avoidance of FOMO and high desire for a sense of belonging (Egan et al., 2018).

The lower household income groups appear to be significantly more motivated by the potential that online sports consumption will enhance their social interaction than higher income groups. A possible explanation may be the amount of disposable income available to higher income groups and therefore access to Pay TV sources that provide the widest selection of sport content. Therefore, Millennials with lower household incomes may be more highly motivated to consume sport content online by whatever means possibly including pirated sites which have no cost barriers to have access to the content that more affluent Millennials have (Wong, 2016).

Finally, results reveal that Black and Coloured sports viewers are significantly more motivated by possible social interaction benefits than Whites. Some evidence that can explain this finding are trends such as Black Twitter, where the activity of a Black Twitter users' personal accounts, conversing whilst TV programming is screening can be more popular than just viewing the TV shows alone. This means the 'social' may become the primary content driver and the TV show itself a secondary driver (Egan, et al., 2018). This could be one explanation for the social motivation being strongest with Black sports viewers.

Objective 3

The next objective of the research was to correlate Millennials' motivation to consume sport content online, specifically the frequency of sports viewership on different media types (3.1) and duration of sports viewership (3.2) with each motivational factor within the Millennial age cohort.

Objective 3.1

The correlations between each media type and the five motivational factors, reveals a void of a strong correlation between any of the media types in terms of frequency of

consumption and motivational factors. Only three factors displayed a moderate relationship between what appears to be the most popular mediums, i.e. Broadcaster website, streaming site, YouTube, and mobile app that also coincidentally provide full live or near live matches and highlights. Notably, all social media were not relevant and the same applied for the social motivation as well as customisation and entertainment motivations.

A possible explanation again, could be the nature of sport content being perishable in nature, as sport viewing is best consumed as it happens. Deninger (2012, cited by Fujak, Frawley and Bush, 2017, p.106) confirms that "90% of viewers who watch a sport broadcast, will do so live".

Objective 3.2

The correlations between the duration of sports viewing and motivation to consume sports online, resulted in lack of evidence of any medium and strong correlations for any of the alternative motivations. The results however unveiled that a weak negative relationship exists between "5-10 minute highlights" and the F2: social interaction motivation. The findings were unexpected, but FOMO may offer a possible explanation, where Millennials simply watch the 5-10 minute highlights simply to remain relevant in their social circles.

In conclusion, the findings reveal that Millennials are not strongly motivated to consume sport content online yet. Although the functional displacement of traditional television is over ridden by the superior functionality and benefits that can be gained by consuming content online, barriers exist that still encourage traditional TV viewing. Motivations that have been found to spur Millennials' use of online alternatives for sports viewing and that should be taken notice of by TV broadcasters if they want to remain relevant, are: motivation to experience *convenience and control*, a motivation to achieve/ enjoy personalisation; *affordability and value for mone*y; *entertainment (hedonic benefits). Social interaction* is not a strong motivation for online sports consumption.

It is apparent that Millennials are influenced by various trends within their demographic subgroups, with a heightened desire to remain relevant. Some trends that are drivi**ng this behaviour, include FOMO and Black Twitter.** Millennials seek instant gratification and as a result engage in illegal streaming and the piracy of content if current broadcast services do not serve their needs, this online consumption behaviour is rising as the

barrier to mobile data streaming services becomes more accessible, with the contributing factor that the cost of broadband is no longer an obstacle to access these services.

Millennials still apparently want to watch sport content live, with a moderate relationship between what appears the most popular media, i.e. Broadcasters' websites, streaming sites, YouTube, mobile app that also coincidentally provide full live or near live matches and highlights

7.4 RECOMMENDATIONS AND IMPLICATIONS

7.4.1 Implications For Business

TV remains a favourite among Millennials, this may be because of the nature of sport, compared to other entertainment genre's and therefore the motivation to move to online sources are not as immediate. Findings also confirm that Sport is still best consumed live, which is good news for providers of sport content and advertisers to capitalise on the high viewership opportunities that live sport events attract.

However traditional broadcasters should be aware that Millennials are migrating to online platforms and that the adoption of online streaming services is increasing as data costs are becoming less of a barrier to access. Broadcasters should begin to provide their own online services that can compete with Pay TV providers in South Africa such as MultiChoice. Service providers cannot ignore the importance of sport presentation to the viable Millennial audience. They should continue to build an online ecosystem that can aptly serve this cohort as they gradually migrate to online sources to continue to receive revenues from this cohort.

Millennials are primarily driven by the convenience and control motivation for online consumption, due to the superiority of this new technology. The personal preference and interest motivation was also significant, also a function of the technologies' ability to customise their viewing experience compared to traditional TV. Broadcasters should be aware that online consumption will become the norm and with it, the prevalence of Illegal streaming, is a threat to the sustainability of legal broadcast websites and mobile applications. More alternatives need to be provided by current broadcasters making the ease of access to legal sources favourable.

7.4.2 Theoretical Implications And Recommendations For Future Research

Uses and gratification theory remains a highly relevant theory in respect to the study, it is applicable when understanding why consumers would experience technological displacement when a new medium provides superior advantages over the old. Dolan, Conduit, Fahy, & Goodman (2016), explored the paradigm shift occurring as consumer adoption escalates, which is significantly altering the manner in which consumers engage with brands.

The study attempted to unpack generational cohort theory in the South African context, there is a current shortage of quality research on generational theory in the South Africa, which calls for much needed future research to understand the generational differences that exists amongst South African's. Further to this, there is a desperate need for more research on South African Millennials, including the possible definition and time span of this cohort in our countries context given our divided past. There are many sub-groups with so much more to uncover about the psychographics of this cohort as influenced by cultural diversity, influence of parents who were under the Apartheid regime, the difference between Born Free's and those born in the last decade of Apartheid.

These all influence the role of sport in a Millennial's life, some being excluded from certain sports and the traditions surrounding the sport as well as community sentiment and experience with certain sports and teams that could influence their sport viewership, their preferences, social interactions around sport consumption

7.5 LIMITATIONS OF THE STUDY

Time and resources were limitations to get a representative sample of the target population of Gauteng, the number of respondents although statistically large enough to calculate outcomes, the findings were not representative of the Gauteng province and therefore findings are not generalisable.

The collection of participants was via social media due to purposive sampling, which limited to those who have access to social media and contributes to lack of generalisability of the findings. Snowball sampling also added bias to older millennials and under representation of black participants and over representation of white coloured and Indian participants

The study was conducted in one province (Gauteng) and cannot be representative of South African Millennials as a whole, this study represents a small elite sample of south

Africa, given the large income disparity, further research should be conducted on a national scale to get a more realistic study that represents our diverse nation.

The combination of scales two scales with one's initial use was for online shopping, although all Cronbach Alpha attained values of p>0.7, which proved that the new scale was reliable, its original intent was out of scope for this study.

7.6 CONCLUSION

The purpose of the study was to gain empirical evidence of the sports consumption behaviour of the emergent Millennial consumer, with specific focus on the different sources used to view sports content, as well as their motivations to do so. It was clear that convenience and control is the primary motivation for Millennials to consume sport content online, which has implications for traditional broadcasters as functional displacement will move consumers to online mediums as a result of superior functionality and benefits.

From a theoretical perspective, it revealed their current online consumption behaviour that could be useful to anticipate their future needs with regard to sports viewing to mitigate the decline in revenue earned by traditional service providers. This is important as a content provider needs to serve them better in terms of their needs and expectations, especially as this market segment's purchasing power is bound to increase over time. This makes them a viable market segment to keep track of. It is critical for broadcasters to provide online services now as their needs are being under met by their current offering.

Outcomes can assist broadcasters to remain relevant and to increase subscriptions rather than to continually be concerned about dwindling viewer numbers. Having the relevant information, marketers would also understand how to meaningfully reach these consumers by providing relevant content on media platforms they consume intuitively in aid of building brand equity, to persuade and encourage them to purchase (subscribe) to a particular service and to continue to do so in the future. It is important to note that despite Millennials as a cohort they collectively, share some similarity of beliefs, attitudes and preferences, however demographic differences have huge implications on the sub-groups motivations for social interaction.

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APPENDICES

9. APPENDICES

9.1 ANNEXURE 1: DRAFT QUESTIONNAIRE

Dear sports enthusiast,

I am conducting research on **Millennials' motivation to consume sport content online.** To that end, your contribution towards this academic endeavor which forms part of my MBA studies, will be highly appreciated. At the same time, your contribution will be useful in terms of an understanding of the benefits Millennials derive from consuming sport content online, which will enable content providers to be more customer centric in their offerings.

The questionnaire should take no more than **10 minutes** of your time. Your participation is voluntary, and you can withdraw at any time without penalty. Your participation is anonymous and all data will be kept confidential as only aggregated data will be reported.

By completing the survey, you indicate your willingness to voluntarily participate in this research. If you have any concerns, please do not hesitate to contact my supervisor or me. Our details are provided below.

Researcher: Nadia Gossmann
04898461@mygibs.co.za

Supervisor: Prof Alet Erasmus
alet.erasmus@up.ac.za

Section 1
Demographic information
1. How old are you?
- 20 – 24
- 25 - 29
- 30 – 34
- Older
- Younger

2. Gender:

- Female
- Male

3. Do you live in Gauteng?

- Yes
- No

4. Population group:

- Black
- Coloured
- Indian / Asian
- White
- Other

5. What is your total monthly household income

- Less than R10,000
- R10,001 – R20,000
- R20,001 – R30,000
- R30,001 – R40,000
- R40,001 – R50,000
- More than R50,000

6. How frequently have you watched sports in the last 12 months?

- Daily
- Weekly
- Maximum three times per month
- Monthly
- Occasionally, up to eight times
- Seldom, less than six times
- Never

Section 2

Your Sports Content Consumption Behavior

The following definitions apply:

- **Sports Content** – The attendance or viewing a live match AND/OR watching match highlights, news programs, social media, documentaries, participating in online fantasy and prediction sport games*

  * A fantasy and prediction sport game involves participants engaging in virtual versions of professional sports leagues, teams and individuals compete based on the players and teams real statistical performance.

- **Consume Sports Content** – to watch live matches / match highlights / sports clips, to engage and interact with other sports fans, favorite clubs, athletes; viewing catch up on sport

7. How many ways do you consume sports content? **Please mark all boxes below according to your consumption pattern of each media type, Always OR Frequently OR Occasionally OR Never** make use of these to consume sports content:

	Always	Frequently	Occasionally	Never
Live TV				
Broadcaster websites and app's				
Streaming websites and app's				
YouTube				
Facebook				
Twitter				
Instagram				
Snapchat				
News websites				
Mobile sport app's				
League and Tournament websites				
Fantasy League and Prediction game sites				

8. How do you best enjoy consuming sports content? Rank in order of preference:

   1 (highest preference), 2 (second best), 3 (third choice)

Option	Rank order
Full live match	
15 – 30 minutes Extended highlights	
5 – 10 minute Highlights	
2 – 4 minute clips	
Up to 1 minute clips	
Magazine shows	
Documentaries	

Section 3

Online Consumer Motivation

Please answer the following questions indicating your motivation to consume sport content online with numbers representing:

1= Strongly Disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly Agree

Reference: Martínez-López, F. J., Pla-García, C., Gázquez-Abad, J. C., and Rodríguez-Ardura, I. (2014). Utilitarian motivations in online consumption: Dimensional structure and scales. *Electronic Commerce Research and Applications*, *13*(3), 188-204.

Desire for control (Original items)	9 Desire for control (Adapted version for the questionnaire)
By using price comparison tools I feel more in control of the entire buying process.	9.1 By using affordable or free alternatives online I feel in control of my sport content consumption
I like to feel I have control over my online consumption process.	9.2 I like to feel I have control over the medium/ device I want to consume sport content on.
Additional question	9.3 Having 24/7 access to sport content online, gives me a sense of control of my consumption process
The Web allows me to control my consumption visit.	9.4 Only consuming or being served the sport content I am interested in makes me feel in control of my viewing experience

Convenience	10 Convenience
Shopping online saves me a lot of time.	10.1 Watching or consuming sport content online saves me a lot of time
Online shopping makes my life easier.	10.2 Watching or consuming sport content online makes my life easier
The Internet is a convenient way of shopping.	10.3 Using the Internet to watch or consume sport content is convenient for me
Online shopping fits my schedule.	10.4 Consuming sport content online fits my schedule
Online, I can go shopping whenever I want.	10.5 Watching sport content online allows me to watch whenever I want
What I value a lot is the convenience of ordering over the Internet.	Omitted: duplication of 10.3

Assortment	11 Variety of content
I buy online because there I can get what I want.	11.1 I watch sport content online because there I can get what I want
I buy online because it provides me with easy and quick access to products/services I do not have in my local area.	11.2 I watch sport content online because it provides me with quick and easy access to sports content I do not have access to on conventional TV
I like to buy online because of the wide selection of products and services it offers.	11.3 I watch sport content online because of the variety of sports content that are available in formats I like
The Internet provides me with a broad selection of niche products, and/or products I would not otherwise look for Economy.	11.4 The Internet provides me with a broad selection of sport content I would not otherwise have access to
Online, I can get good value for my money.	11.5 Consuming sport content online is good value for money
You can save a lot by shopping online.	11.6 I save a lot by consuming sport content online
Thanks to comparison shopping tools, I know I get the best value for the price I want to pay.	N/A
On the Internet, I often come across real bargains and/or competitive prices.	N/A
I go shopping online to take advantage of sales or special offers.	N/A

Availability of information	12 Availability of information
What I value in online shopping is the availability of information not only from the retailer and manufacturer, but also from other customers.	12.1 What I value by consuming sport online is the availability of information from the sports commentators as well as other sport fans.
Thanks to price comparison tools, I get quick and easy access to the information I need.	N/A
Due to quick and easy access to large volumes of information, I feel more empowered as an online consumer.	12.2 Thanks to the many sources of sport content online, I have quick and easy access to the information I want, which makes me feel like an empowered online consumer
When I plan my shopping, I often use the information I find on the Internet.	12.3. When I plan to consume sport content I often use information I find on the Internet

The Internet provides me with the kind of decision-making information that was not available to me before.	12.4 Online sport content sources provide me with the kind of decision-making information that I did not have access to before.
Online information availability helps me make better transactions in terms of economic aspects.	12.5 Financially, the availability of different media sources is beneficial to me in terms of my sport content consumption
Even if I bought the product in a physical store, I turn to the Web for product support information.	12.6 Even when I consume sport content on TV, I go online for additional sport content

Adaptability/customization	13 Customisation
On the Internet, I can order products that are tailor-made for me.	13.1 Online I can choose or customize only the sport and teams that interest me
On the Internet, I get products/services customized to my needs.	13.2 Online, I have the option to consume only the sport content and team that interest me
The customization approach to online shopping makes me feel as if I were a unique customer.	13.3 By customizing my online sports consumption, I feel unique
Purchase recommendations match my needs.	13.4 Online, I can matches my sports content consumption according to my needs
Additional item	13.5 With online sports consumption, I am able to control my frequency of consumption

Absence of social interaction	Goes against literature, where users seek social interaction from online sport consumption.
Online shopping allows me to avoid social interaction with others.	N/A
Online shopping allows me to avoid salespeople.	N/A
Payment services	Covered in desire for control
I choose to buy online because I have available to me a variety of payment options, such as credit card and payment on delivery that suit my needs.	N/A
The offering of alternative electronic payment methods (e.g. Visa, Mastercard, Paypal, etc.) facilitates my shopping.	N/A

Anonymity	This pertains mainly to online shopping, rather than content consumption
I highly value the anonymity of online shopping.	N/A
I like to shop in the privacy and comfort of wherever I am with my computer.	N/A
Online, I can enjoy high degree of anonymity while shopping.	N/A

Reference: Ko, H., Cho, C. H., and Roberts, M. S. (2005). Internet uses and gratifications: A structural equation model of interactive advertising. *Journal of advertising, 34*(2), 57-70.

Entertainment motivation	14 Entertainment Motivation
To pass time	14.1 I consume sport online to pass the time
I just like to surf the Internet	14.2 I consume sport online as I just like to surf the internet
It's enjoyable	14.3 I consume sport content online because I find it enjoyable
It's entertaining	14.4 I consume sport content online because I find it entertaining

Social Interaction motivation	15 Social Interaction motivation
	"I consume sport content online":
I wonder what other people said	15.1 So I can be in touch with other people's opinions
To keep up with what's going on*	15.2 To keep up with what's going on in my favorite sport
To express myself freely	15.3 To express myself freely
To meet people with my Interests	15.4 To engage with people who share my sport interests
I would participate in customer discussions	15.5 To participate in fan discussions
I would provide my feedback to the site	15.6 To share my views on the site
I would contact the company	15.7 I can follow my favourite clubs and athletes
I would sign in at the site for information	N/A

10.2 ANNEXURE 2: QUESTIONNAIRE SECTION 3

<u>Online Consumer Motivation</u>

Please answer the following questions indicating your motivation to consume sport content online with numbers representing:

1= Strongly Disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly Agree

10.4 Consuming sport content online fits my schedule
9.2 I like to feel I have control over the medium/ device I want to consume sport content on.
13.4 Online, I can matches my sports content consumption according to my needs
12.4 Online sport content sources provide me with the kind of decision-making information that I did not have access to before.
11.6 I save a lot by consuming sport content online
12.2 Thanks to the many sources of sport content online, I have quick and easy access to the information I want, which makes me feel like an empowered online consumer
14.3 I consume sport content online because I find it enjoyable
10.5 Watching sport content online allows me to watch whenever I want
11.1 I watch sport content online because there I can get what I want
9.1 By using affordable or free alternatives online I feel in control of my sport content consumption
13.3 By customizing my online sports consumption, I feel unique
15.5 *I consume sport content online* to participate in fan discussions
11.6Consuming sport content online is good value for money
15.6 *I consume sport content online* so I can share my views on the site
12.1 What I value by consuming sport online is the availability of information from the sports commentators as well as other sport fans.
10.3 Using the Internet to watch or consume sport content is convenient for me
15.4 *I consume sport content online* to engage with people who share my sport interests
14.2 I consume sport online as I just like to surf the internet
14.1 I consume sport online to pass the time
15.3 *I consume sport content online* to express myself freely
13.2 Online, I have the option to consume only the sport content and team that interest me
11.4 The Internet provides me with a broad selection of sport content I would not otherwise have access to
9.3 Having 24/7 access to sport content online, gives me a sense of control of my consumption process
13.5 With online sports consumption, I am able to control my frequency of consumption

13.1 Online I can choose or customize only the sport and teams that interest me
15.2 *I consume sport content online* to keep up with what's going on in my favorite sport
9.4 Only consuming or being served the sport content I am interested in makes me feel in control of my viewing experience
11.2 I watch sport content online because it provides me with quick and easy access to sports content I do not have access to on conventional TV
15.1 *I consume sport content online* so I can be in touch with other people's opinions
10.2 Watching or consuming sport content online makes my life easier
12.5 Financially, the availability of different media sources is beneficial to me in terms of my sport content consumption
14.4 I consume sport content online because I find it entertaining
10.1 Watching or consuming sport content online saves me a lot of time
15.7 *I consume sport content online* so I can follow my favourite clubs and athletes
11.3 I watch sport content online because of the variety of sports content that are available in formats I like

9.3 ANNEXURE 3: ETHICAL CLEARANCE APPROVAL LETTER

Gordon Institute of Business Science
University of Pretoria

13 August 2018

Gossmann Nadia

Dear Nadia

Please be advised that your application for Ethical Clearance has been approved.

You are therefore allowed to continue collecting your data.

Please note that approval is granted based on the methodology and research instruments provided in the application. If there is any deviation change or addition to the research method or tools, a supplementary application for approval must be obtained

We wish you everything of the best for the rest of the project.

Kind Regards

GIBS MBA Research Ethical Clearance Committee

9.4 ANNEXURE 4: ONLINE CONSUMPTION MOTIVATIONS: ROTATED FACTOR MATRIX, COLOUR AS PER ORIGIONAL ITEMS

Items	Factor				
	F1	F2	F3	F4	F5
To keep up with what's going on in my favorite sport	0.690				
With online sports consumption, I am able to control my frequency of consumption	0.683				
Only consuming or being served the sport content I am interested in makes me feel in control of my viewing experience	0.678				
Online I can choose or customize only the sport and teams that interest me	0.655				
I consume sport content online because I find it entertaining	0.610				
Online, I have the option to consume only the sport content and team that interest me	0.544				
Having 24/7 access to sport content online, gives me a sense of control of my consumption process	0.527				
Watching or consuming sport content online makes my life easier	0.492				
Watching sport content online allows me to watch whenever I want	0.487				
I can follow my favourite clubs and athletes	0.445				
I watch sport content online because of the variety of sports content that are available in formats I like	0.431				
The Internet provides me with a broad selection of sport content I would not otherwise have access to	0.387				
To engage with people who share my sport interests		0.812			
So I can be in touch with other people's opinions		0.753			
To share my views on the site		0.732			
To participate in fan discussions		0.731			
To express myself freely		0.659			
What I value by consuming sport online is the availability of information from the sports commentators as well as other sport fans.		0.562			
By customizing my online sports consumption, I feel unique		0.426			
Consuming sport content online fits my schedule			0.701		
Online, I can match my sports content consumption according to my needs			0.589		
Thanks to the many sources of sport content online, I have quick and easy access to the information I want, which makes me feel like an empowered online consumer			0.579		
I consume sport content online because I find it enjoyable			0.520		
I like to feel I have control over the medium/ device I want to consume sport content on.			0.465		
Using the Internet to watch or consume sport content is convenient for me			0.360		
I save a lot by consuming sport content online				0.656	
Consuming sport content online is good value for money				0.636	
I watch sport content online because there I can get what I want				0.534	
By using affordable or free alternatives online I feel in control of my sport content consumption				0.497	
Financially, the availability of different media sources is beneficial to me in terms of my sport content consumption				0.403	
Online sport content sources provide me with the kind of decision-making information that I did not have access to before.				0.395	
I watch sport content online because it provides me with quick and easy access to sports content I do not have access to on conventional TV				0.341	

ANNEXURE 4 CONTINUED

Items	Factor				
	F1	F2	F3	F4	F5
Even when I consume sport content on TV, I go online for additional sport content					0.509
Watching or consuming sport content online saves me a lot of time					0.501
I consume sport online as I just like to surf the Internet					0.447
When I plan to consume sport content I often use information I find on the Internet					0.407
I consume sport online to pass the time					0.371
Mean	**3.90**	**3.12**	**4.04**	**3.71**	**3.42**
Standard Deviation	0.61	0.85	0.64	0.67	0.71
% Variance Explained	14.75	11.20	10.23	7.78	5.57
Cronbach Alpha	0.91	0.89	0.81	0.82	0.71