BEYOND
SPORTS INITIATIVE

SAUDI ARABIA VS. THE UNITED STATES

A Cross-Cultural Comparison of Olympic Media Use and Motivations

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INTRODUCTION
Background:

Over the past 12 years, sports media research has revealed a great deal about the attitudes, motivations, and behaviors of Olympic media fans. For instance, we know that different *types of fandom* inform the likelihood for one to consume Olympic media and that up to *16 motives for media consumption* differ by the nation in which one resides and that the desire for companionship and relationship building tends to lessen these motives, functioning as a counterbalance.

We also know that various forms of *national identification drive these desires* and that they can potentially *shift over the course of time*. We also have established that national identity tends to drive Olympic media consumption much more than the inverse where Olympic media consumption alters national identity.

Moreover, research has shown the Olympic media is not only ripe for facilitating second-screen usage, but also for enhancing social presence via *Social TV functions* where multiple devices are being used to consume the Olympics simultaneously, typically with one device being the passive consumption mechanism and the other functioning as an interactive device to discuss Olympic media and consume it more deeply.

In all, eleven nations (Australia, Bulgaria, Canada, China, Germany, Japan, the Netherlands, Slovenia, Sweden, the United Kingdom, and the United States) from four continents have been sampled to reveal how Olympic media preferences, tastes, and desires shift within a specific nationalized sports culture. Nevertheless, media systems are continually shifting, with the attitudes and behaviors toward Olympic media being altered in the process.

There is a need to discern how these motivations, desires, and behaviors play out in the Middle East, specifically within Saudi Arabia where great efforts have been made for the nation to host, facilitate, and participate in global sport.

This report focuses on how Saudi Arabian (SA) Olympic media consumption differs from that of the United States of America (USA). The USA comparison is utilized because of the outsized role it plays in the funding of the International Olympic Committee. More specifically, nearly three quarters of IOC funding is secured via the sale of television rights, with over half of that specifically coming from the USA television broadcast rights holder (NBC).

Other Revenue
5%

TOP Programme Marketing/Rights
18%

Broadcast Rights
73%
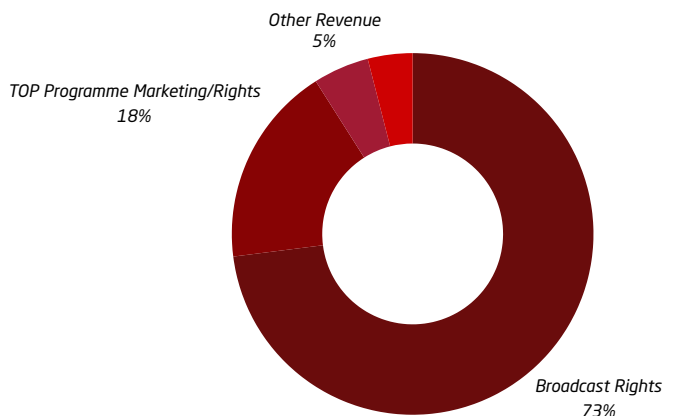
Thus, this report will focus on both how and why people opt to consume Olympic media.

Significance:

Half of the modern world (four billion people) views the Summer Games; a quarter of the world (two billion people) views the Winter Games. For many cultures, media penetration (defined as consuming at least some content) is greater than 98% for a Summer Olympics. While some fans watch the Games in person, this is obviously a meager total when compared to the number consuming the Games via media.

Only the FIFA World Cup can arguably rival this level of media consumption. If one seeks to understand megasporting events, one must first understand the outsized role of the Summer Olympic Games, which has been classified as the only sporting event warranting a new classification, that of a *gigaevent* , when studied one decade prior.

Event	Location	Visitor attractiveness	Mediated reach	Cost	Transformation	TOTAL	Class
Olympic Summer Games	London 2012	3	3	3	2	11	Giga
Euro	Ukraine/Poland 2012	2	2	3	3	10	Mega
Football World Cup	South Africa 2010	3	3	2	2	10	Mega
Expo	Shanghai 2010	3	0	3	3	9	Mega
Asian Games	Guangzhou 2010	2	0	3	3	8	Mega
Olympic Winter Games	Vancouver 2010	2	2	2	1	7	Mega
Commonwealth Games	Delhi 2010	2	0	2	2	6	Major
Universiade	Kazan 2013	1	0	2	2	5	Major
Pan American Games	Guadalajara 2011	1	0	0	0	1	Major
APEC Summit	Vladivostok 2012	0	0	3	3	6	Major
European Capital of Culture	Liverpool 2008	3	0	0	2	5	Major
Rugby World Cup	New Zealand 2011	2	2x	0	0	4	Major
Super Bowl	New Orleans 2013	0	1	0	0	1	Major

Source: Muller, Leisure Studies, 2014

Measures & Constructs:

To understand the key elements of this report, it is useful to discern how the following measures and constructs will be unpacked:

1. **Olympic Media Consumption:** defined as the number of daily minutes consumed.
2. **Second-Screen Usage:** defined as when multiple devices are simultaneously being used, one of which for Olympic media consumption.
3. **Social TV:** defined as when multiple devices are simultaneously being used, both of which for Olympic media consumption.
4. **Sport Fandom:** defined as the affinity one feels by following and enjoying sports.
5. **Olympic Fandom:** defined as the affinity one feels by following and enjoying the Olympics.
6. **Olympic Team Fandom:** defined as the affinity one feels by following and enjoying their specific national Olympic team.
7. **Patriotism:** defined as one's love of country without comparison to other countries.
8. **Nationalism:** defined as believing one's country is better than another specific country.
9. **Smugness:** defined as the belief that one's country is the best of all countries in the world.
10. **Internationalism:** defined as the celebration of global kinship, regardless of country affiliation.

*Other specifics related to device, Olympic media type, and motivation will be revealed within the core results.

METHOLOGY

Procedure:

An online survey was conducted in the United States and Saudi Arabia the week after the 2024 Summer Olympics (August 12-19, 2024). The questionnaire was built using Qualtrics, an online survey management software. After eliminating incomplete and faulty data, responses from 1,562 respondents were used for analysis: 780 from Saudi Arabia (49.9%) and 782 from the United States (50.1%). All respondents for this study were recruited using Prime Panels, an online market research participant panel service managed by CloudResearch. The survey was available both in English and Arabic.

Demographic Information:

Saudi Arabia Respondents:

The Saudi sample consisted of 321 male respondents (41.2%) and 453 female respondents (58.1%). The mean age for Saudi respondents was 33.34 years (SD = 14.98). Most respondents have a bachelor's degree as their highest educational credential (481 respondents, 61.7%).

United States Respondents:

The American sample consisted of 368 male respondents (47.1%) and 402 female respondents (51.4%). The average age for respondents was 46.53 years (SD = 18.54). Most respondents have a high school diploma as their highest educational credential (270 respondents, 34.5%), with 24.4% of respondents (N = 191) having some college, but no degree.

Fandom:

General sports fanship, Olympic fanship and Olympic team fandom were measured using separate 7-point scales; the higher the score, the more the respondent was considered a fan (Figure 1).

- Saudi respondents (M = 5.20, SD = 1.61) reported being bigger sports fans than Americans (M = 4.18, SD = 1.93) (t (1560) = 11.36, p < 0.01).
- Saudi respondents (M = 4.90, SD = 1.56) reported being bigger Olympic fans than Americans (M = 3.97, SD = 1.83) (t (1560) = 10.79, p < 0.01).
- Saudi respondents (M = 5.08, SD = 1.36) were fans of their national team more than Americans were of their national team (M = 3.95, SD = 1.67) (t (1560) = 14.68, p < 0.01).

(Figure 1, located on the next page, shows a comparison of fandom scores by nation.)
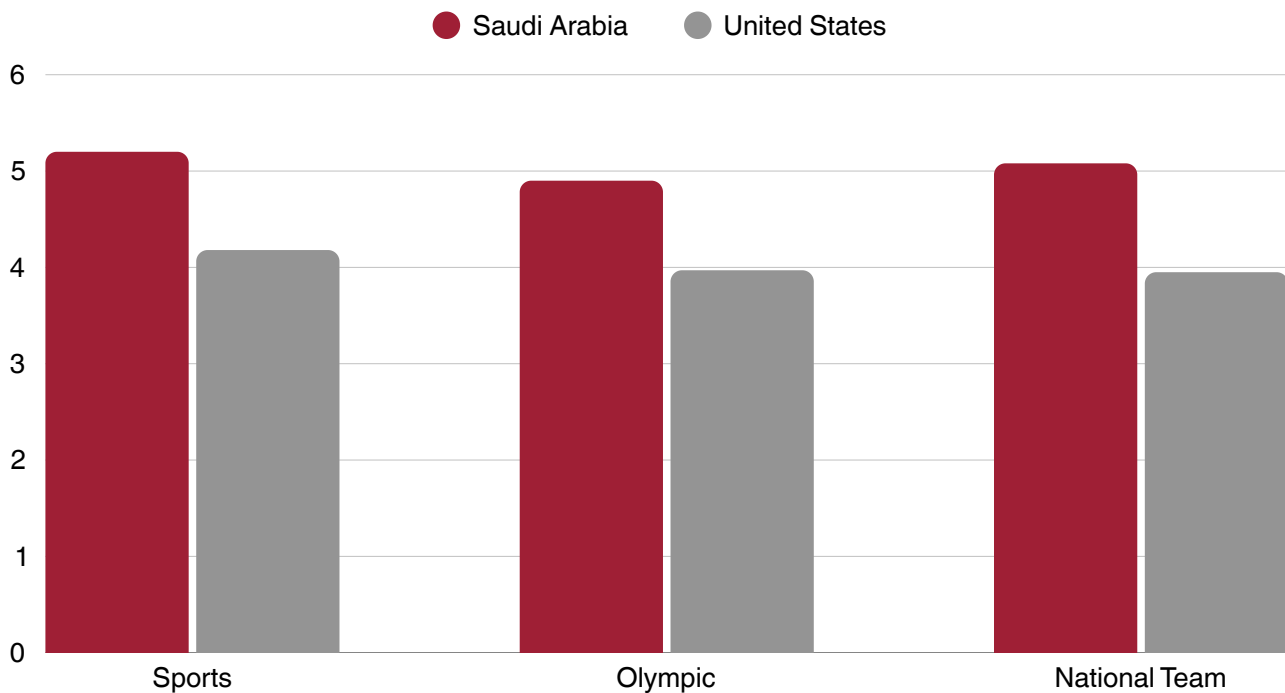
Fandom Scores: National Comaparison

● Saudi Arabia ● United States

Figure 1: Comparison of Fandom Scores by Nation
The higher the score, the more the respondent consider themselves a fan.

FINDINGS
Question 1: How are fans watching the Olympic Games?

How was media consumption measured?

Media consumption was measured using four specific approaches:

- A 13-item, 7-point index was used to measure the likelihood that respondents used specific televisual, social and digital media channels to consume Olympic content. The higher the mean score, the more likely the respondent used that specific media channel.
  - Televisual media channels: The Olympic Channel, national television coverage, local television coverage.
  - Social media channels: Facebook, X (Twitter), Instagram, Tik Tok, YouTube, other social media outlets.
  - Digital media channels: live-streaming websites (not including social networking), non live-streaming websites (not including social networking), mobile apps, blogs/message boards.
- An open-ended question was asked: "How many minutes did you spend consuming Olympic content daily?"
- A 5-item, 7-point index was used to measure the likelihood that respondents used specific devices to consume Olympic content: televisions, tablets, laptop computers, desktop computers, smartphones. The higher the mean score, the more likely the respondent used that specific device.

Question 1: How are fans watching the Olympic Games? (cont.)

How was media consumption measured? (cont.)
- A 6-item, 7-point index was used to measure the likelihood that respondents consumed specific Olympic content: live Olympic coverage, tape-delayed Olympic coverage, news/information/highlights, interactions with other fans, interactions with other athletes, and sharing user-generated content (content that the respondent created). The higher the mean score, the more likely the respondent consumed that specific type of content.

What are the primary channels that Americans and Saudis used for Olympic viewing?
Saudi respondents reported using YouTube (M = 5.00, SD = 1.93), TikTok (M = 4.69, SD = 2.06) and X/Twitter (M = 4.67, SD = 2.01) the most compared to other media channels. In addition, when controlling for age and Olympic fanship, Saudi respondents used significantly more social media channels (M = 4.49, SD = 1.55) than both televisual (M = 4.14, SD = 1.79) and digital (M = 4.14, SD = 1.64) media channels ($F_{(2, 778)} = 35.32$, $p < 0.01$).

American respondents reported using national television coverage (M = 4.14, SD = 2.23), local television coverage (M = 3.95, SD = 2.12) and YouTube (M = 3.93, SD = 2.23) the most compared to other media channels. When controlling for age and Olympic fanship, American respondents used significantly more televisual channels (M = 3.64, SD = 1.77) than both social (M = 3.21, SD = 1.73) and digital (M = 3.13, SD = 1.67) media channels ($F_{(2, 780)} = 51.09$, $p < 0.01$).

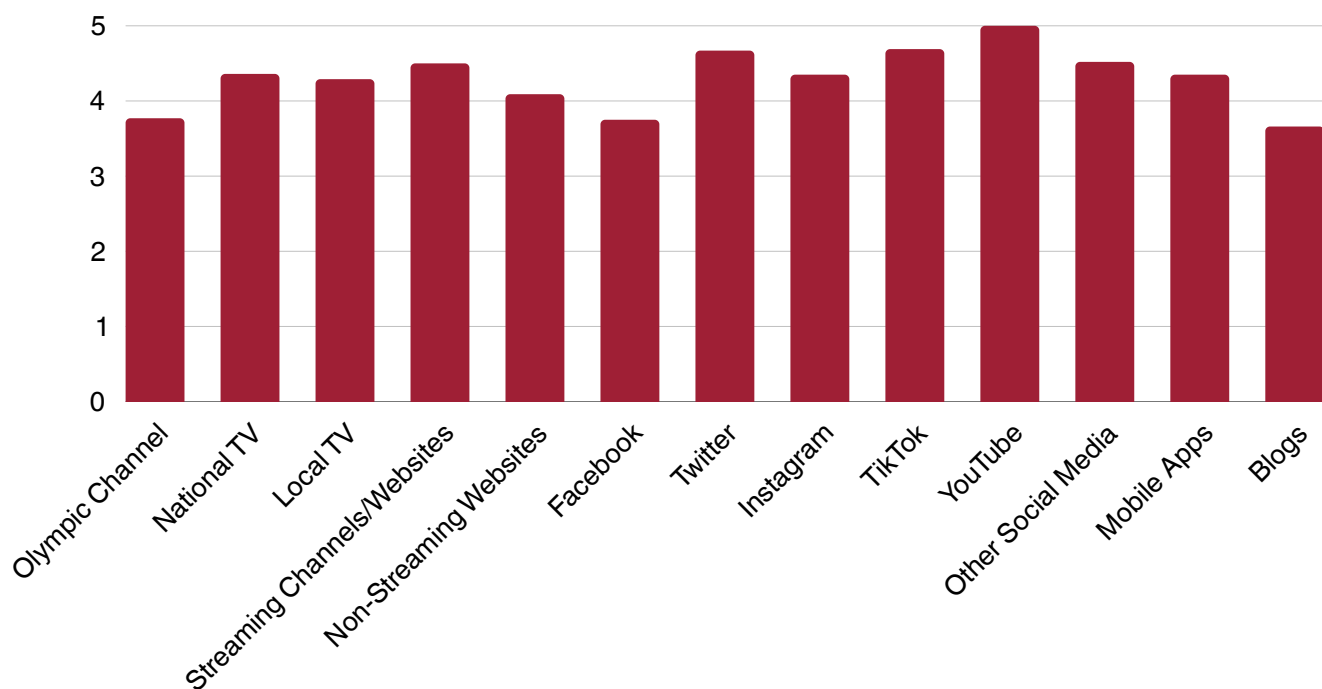**Figure 2:** Media Channel Usage in Saudi Arabia
The higher the score, the more the channel was used to consume Olympic media.

What are the primary channels that Americans and Saudis used for Olympic viewing? (cont).
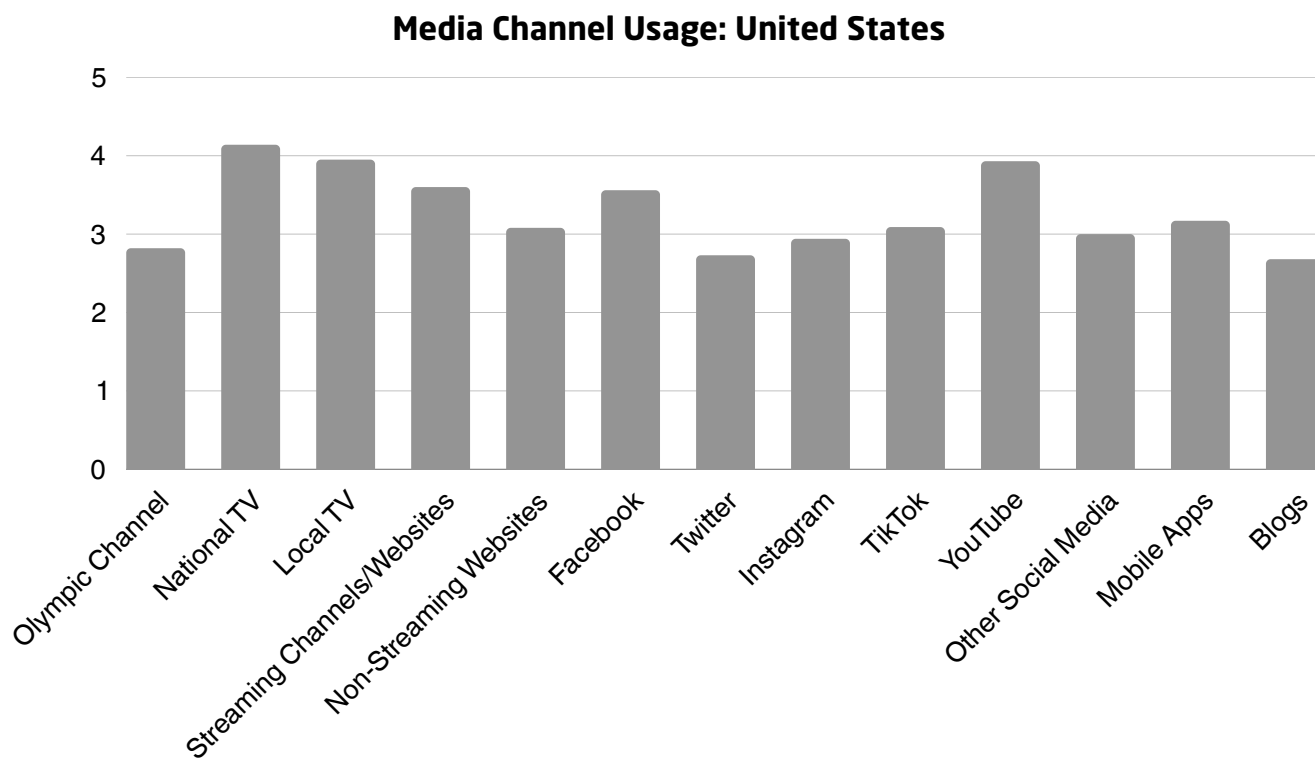
Media Channel Usage: United States

Figure 3: Media Channel Usage in the United States
*The higher the score, the more the channel was used to consume Olympic media.

Did type of media channel predict overall media consumption?

Regression models were controlled for age and Olympic fanship. For Saudi respondents ($R2$= 0.03, $F (15, 762)$ = 1.80, p = 0.03), there were no direct predictors of Olympic media consumption. The Olympic Channel (β = -0.14, t = -2.65, p < 0.01) and TikTok (β = -0.10, t = -2.08, p = 0.04) were inverse predictors of Olympic media consumption. In other words, the more respondents used The Olympic Channel and TikTok to consume Olympic content, the less daily content they consumed.

For American respondents ($R2$ = 0.08, $F (15, 765)$ = 4.34, p < 0.01), national television (β = 0.16, t = 3.08, p < 0.01) was a direct predictor of Olympic media consumption. In other words, the more respondents watched national television coverage of the Olympics, the more daily content they consumed.

Question 1: How are fans watching the Olympic Games? (cont.)

What are the primary devices that Americans and Saudis used for Olympic viewing? Did type of device used predict overall media consumption?

Both Americans and Saudis used television and smartphones as their primary devices for consuming Olympic content. For Saudi respondents, smartphones (M = 5.63, SD = 1.65) were used more than televisions (M = 4.89, SD = 2.18) to consume Olympic content. For Americans, televisions (M = 4.80, SD = 2.35) were used more than smartphones (M = 3.87, SD = 2.30). Type of device did not predict overall media consumption for either country.
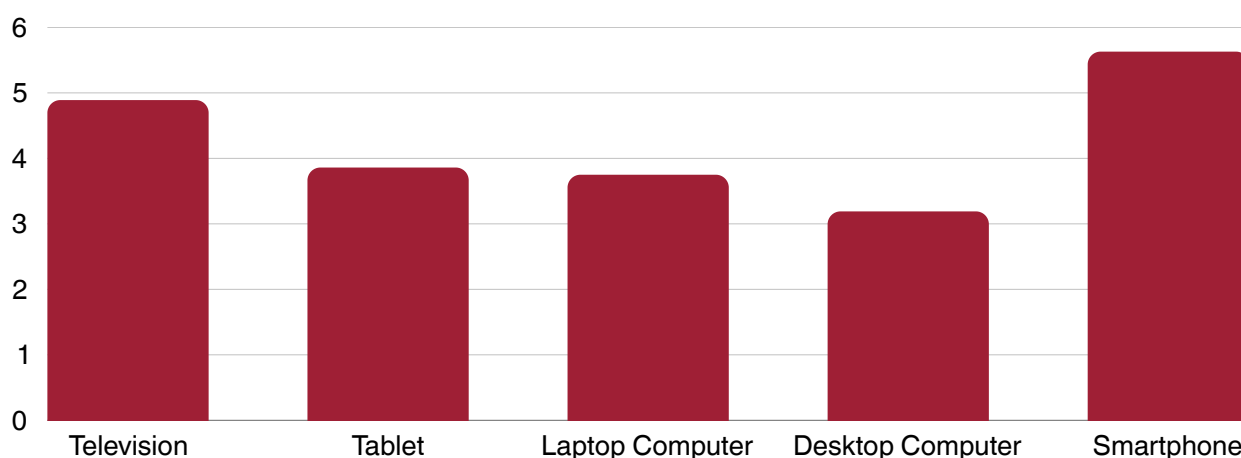

Figure 4: Device Usage in Saudi Arabia
The higher the score, the more the device was used to consume Olympic content.
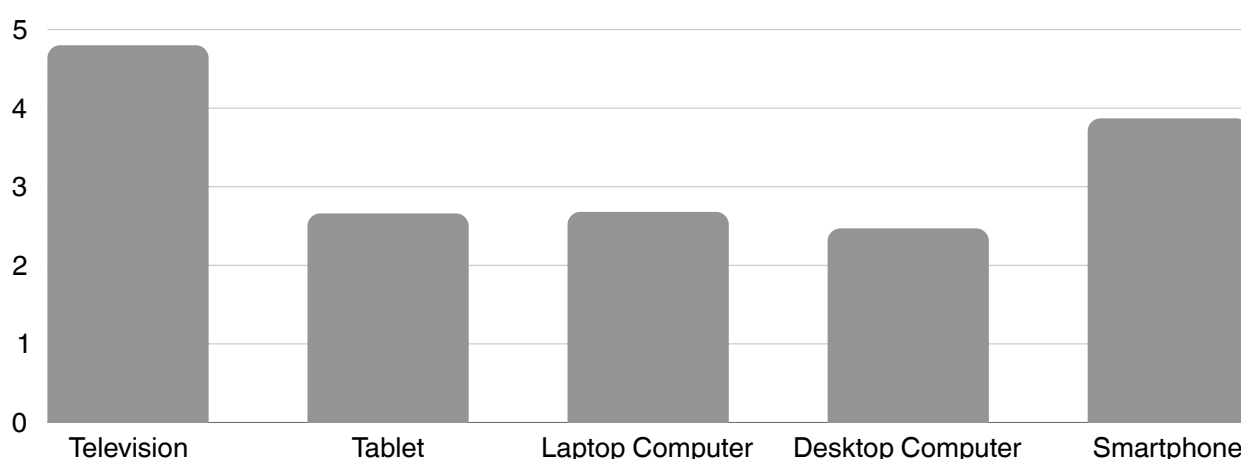

Figure 5: Device Use in the United States
The higher the score, the more the device was used to consume Olympic content.

Question 1: How are fans watching the Olympic Games? (cont.)

What are the primary forms of Olympic content that Americans and Saudis consumed? Did type of content consumed predict overall media consumption?

Saudi respondents consumed more news/information/highlights (M = 4.51, SD = 1.92) and more live coverage (M = 4.49, SD = 2.03) than any other type of content. American respondents consumed more live coverage (M = 4.01, SD = 2.18) than any other type of content.

When controlling for age and Olympic fanship, type of content did not predict Olympic media consumption for Saudi respondents. For American respondents (R^2 = 0.10, $F_{(8, 772)}$ = 10.20, $p < 0.01$), consuming live coverage (β = 0.11, t = 2.32, p = 0.02) and interacting with Olympic athletes (β = 0.30, t = 4.02, $p < 0.01$) were direct predictors of Olympic media consumption. In other words, the more respondents watch live coverage and interacted with Olympic athletes, the more they consumed Olympic content daily. Sharing user-generated content (β = -0.32, t = -4.48, $p < 0.01$) was an inverse predictor of Olympic media consumption. In other words, the more the respondents shared user-generated content, the less they consumed Olympic content daily.
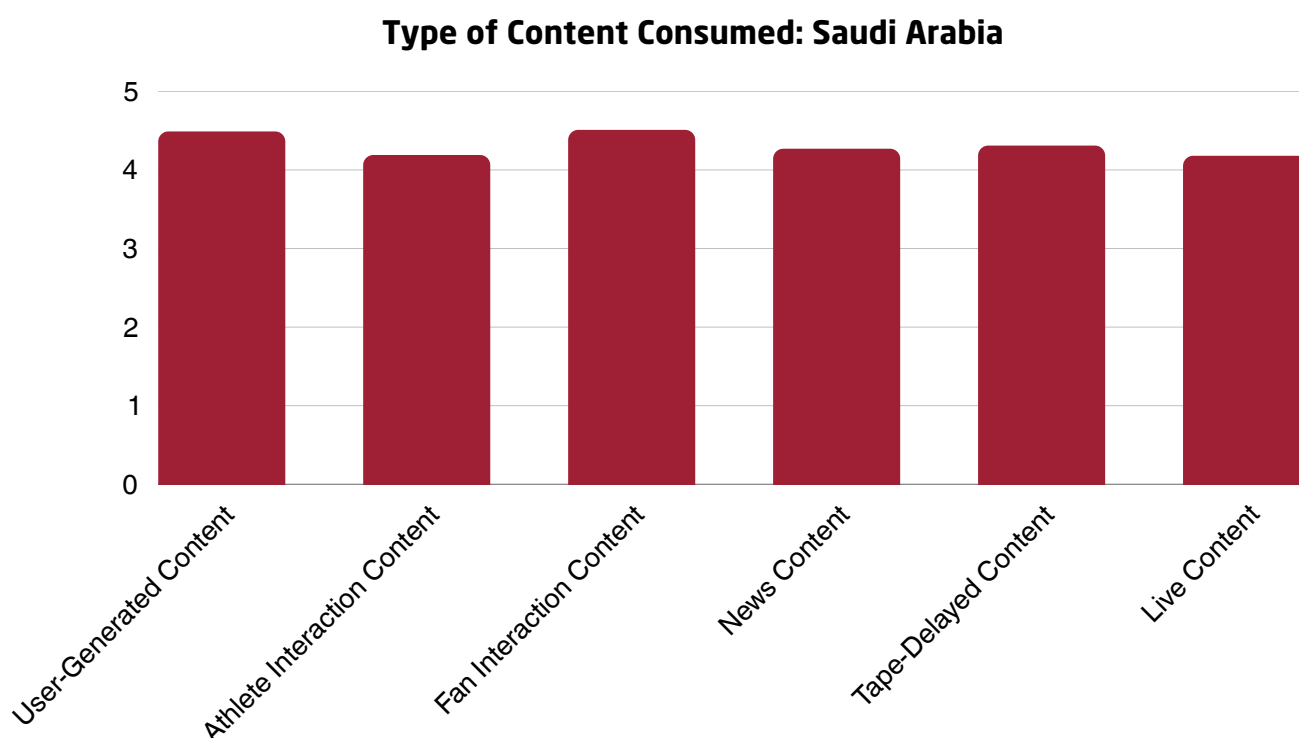

Figure 6: Type of Content Consumed in Saudi Arabia
The higher the score, the more the specific type of content was consumed.

What are the primary forms of Olympic content that Americans and Saudis consumed? Did type of content consumed predict overall media consumption? (cont.)
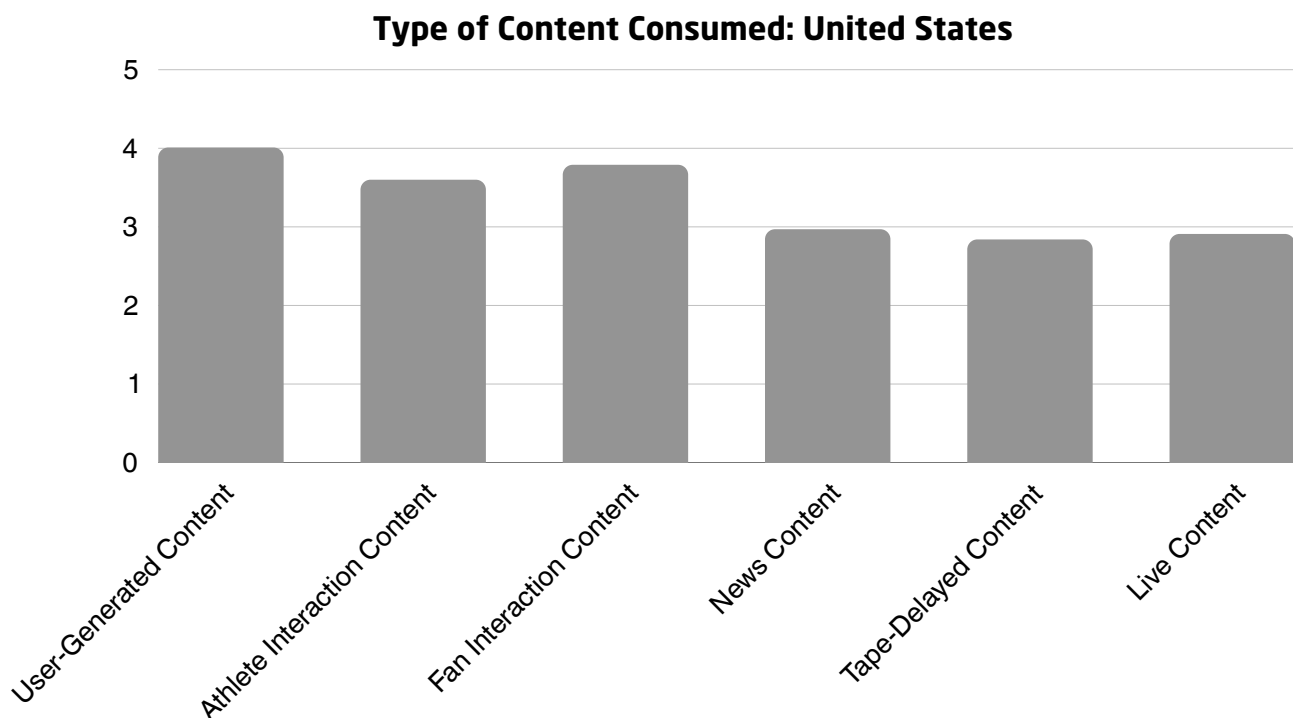
Type of Content Consumed: United States

Figure 7: Type of Content Consumed in the United States
The higher the score, the more the specific type of content was consumed.

How common is second screen usage for both Americans and Saudis during the Olympic games?
Respondents from both countries were asked if they used multiple devices simultaneously to watch the Summer Olympics (dichotomous yes/no question). When asked, 59.6 percent of Saudi respondents said they used multiple devices, compared to only 25.7 percent of American respondents.

What types of (a) devices used and (b) content consumed predict second screen usage?
When asked about second-screen users primary and secondary devices, televisions and smartphones were used by both countries, with televisions being the primary device and smartphones being the secondary device.

For Saudi respondents (c_2 (13, N = 780) = 253.66, p < 0.01, Nagelkerke R2 = 0.38), tablet use (β = -0.17, Wald c_2 = 8.50, p < 0.01), consuming live content (β = -0.17, Wald c_2 = 6.40, p = 0.01) and sharing user-generated content (β = -0.18, Wald c_2 = 6.18, p = 0.01) were inverse predictors of second screen usage. In other words, the more Saudi respondents used tablets to watch Olympic content, watched live content regardless of device, or shared user-generated content, the less likely they were to be second-screen users.

Question 1: How are fans watching the Olympic Games? (cont.)

What types of (a) devices used and (b) content consumed predict second screen usage? (cont.)

For American respondents ($c2$ (13, N = 782) = 316.47, $p < 0.01$, Nagelkerke R2 = 0.49), tablet use (β = -0.25, Wald $c2$ = 11.40, $p < 0.01$) was an inverse predictor of second screen usage. In other words, the more Saudi respondents used tablets to watch Olympic content, the less likely they were to be second-screen users.

Question 2: Why are fans watching the Olympic Games?

How were motivations and nationalistic qualities measured?

Sixteen common motivations for consuming traditional sport, fantasy sport and esport content were measured using separate three-item, seven-point Likert scales. The higher the mean score, the more respondents consumed Olympic content because of that specific motivation:

- as a source of *arousal*;
- to *pass time*;
- to gain a sense of *camaraderie* among others;
- as a source of *entertainment*;
- as a means of *self-expression* to others;
- because it's a *habit*;
- as a means of *escape* from reality;
- to *seek information*;
- to build a *virtual community*;
- to seek *companionship*;
- to seem *cool*;
- to *build relationships* with others;
- for the thrill of watching *competition*;
- to build one's *self-esteem*;
- to talk about the Olympics virtually/digitally with others (*social sport*);
- to know more than others about the Olympics (*Schwabism/mavenism*).

Nationalistic qualities (patriotism, nationalism, smugness, internationalism) were measured using separate seven-point Likert scales (between 5-6 items). The higher the mean score, the more the respondent displayed that specific nationalistic quality.

Question 2: Why are fans watching the Olympic Games? (cont.)

How do motivations differ between Americans and Saudis?
American and Saudi respondents exhibited similar motivations for consuming Olympic content. The top two motivations were the same for both groups: *competition* (first for Saudis) and *entertainment* (first for Americans). In addition, respondents from both countries shared four of the top five motivations: *competition*, *entertainment*, *arousal*, and *passing time*.
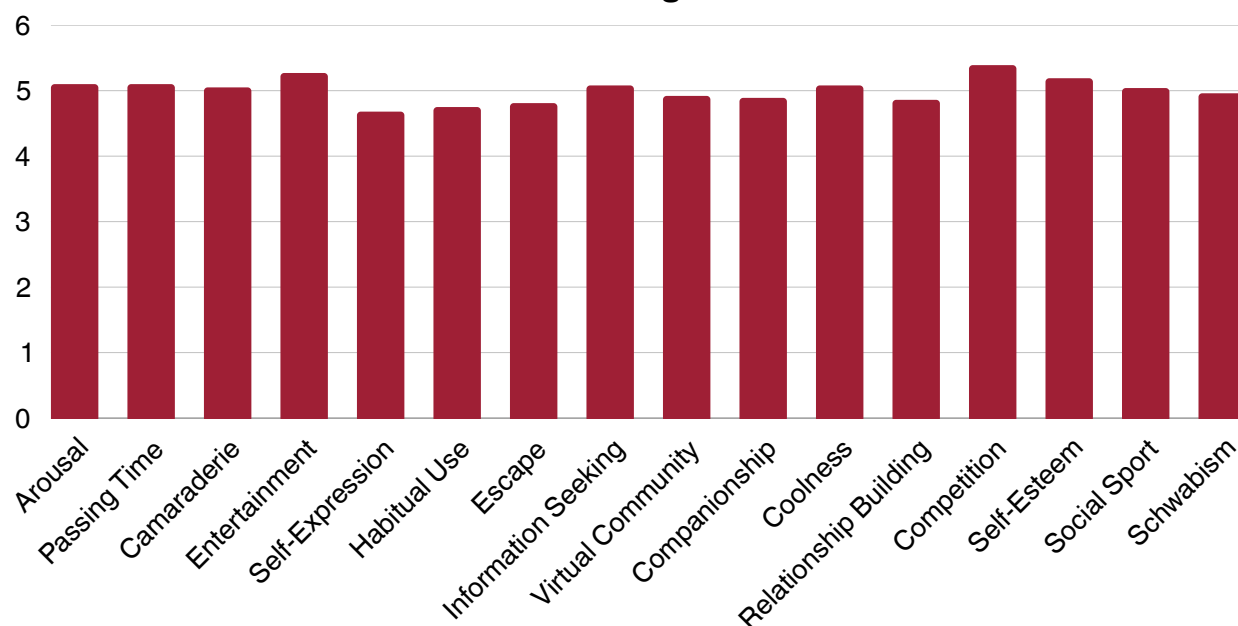

Figure 8: Motivations for Consuming Olympic Content in Saudi Arabia
The higher the score, the more Olympic content was consumed for that specific motivation
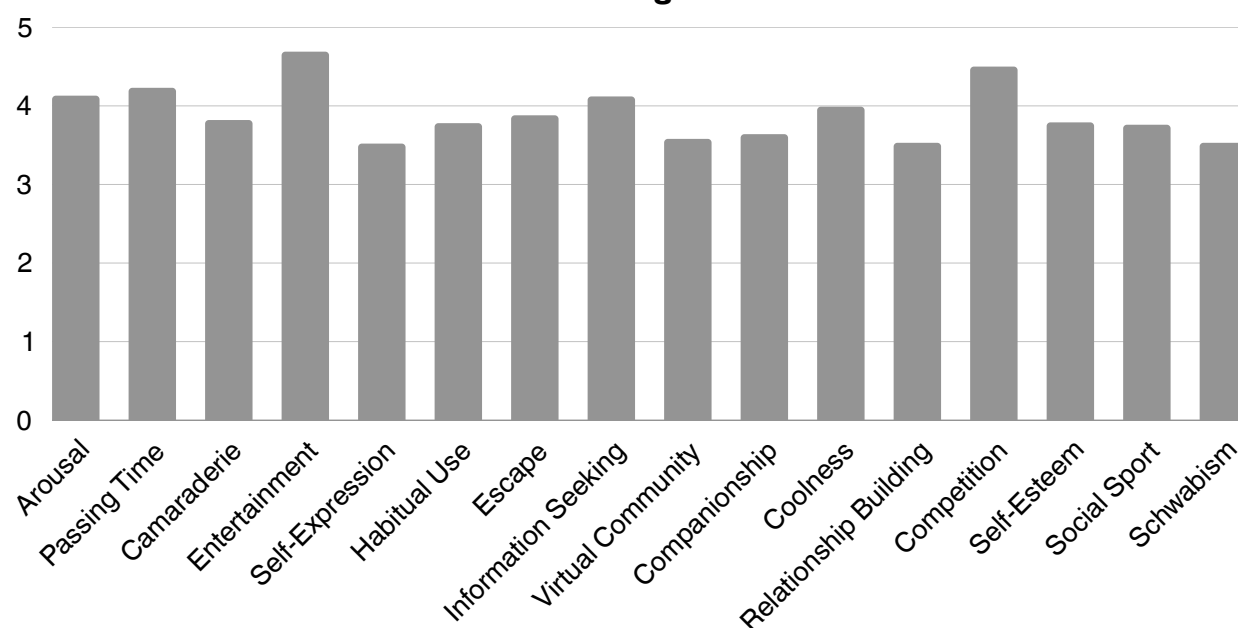

Figure 9: Motivations for Consuming Olympic Content in the United States
The higher the score, the more Olympic content was consumed for that specific motivation

What motivations predict Olympic media consumption?
When controlling for both age and Olympic fanship, no motivations were predictors of Olympic media consumption for Saudi Arabia as the model was not significant. For American respondents ($R^2 = 0.10$, $F_{(18, 762)} = 4.49$, $p < 0.01$), information seeking ($\beta = 0.24$, $t = 2.85$, $p < 0.01$) was a direct predictor, while escape ($\beta = -0.24$, $t = -2.95$, $p < 0.01$) was an inverse predictor. In other words, for Americans, the more respondents consumed Olympic content to seek information, the more content they consumed daily. The more respondents consumed Olympic content as an escape, the less content they consumed daily.

What motivations predict second screen usage?
When controlling for both age and Olympic fanship, for Saudi respondents, no motivations were predictors of second screen usage. For American respondents ($c^2_{(18, N = 782)} = 261.75$, $p < 0.01$, Nagelkerke $R^2 = 0.42$), arousal ($\beta = 0.36$, Wald $c^2 = 4.53$, $p = 0.03$) and self-esteem ($\beta = 0.33$, Wald $c^2 = 5.19$, $p = 0.02$) were direct predictors of second screen usage. In other words, the more Saudi respondents consumed Olympic content for arousal and to boost their self-esteem, the more likely they were to be second-screen users.

How do nationalistic qualities predict (a) Olympic media consumption and (b) second screen usage?
Overall, Saudi respondents scored higher on all four nationalistic qualities than Americans. When controlling for both age and Olympic fanship, no nationalistic qualities predicted Olympic media consumption for Saudi Arabia. For American respondents ($R^2 = 0.06$, $F_{(6, 774)} = 8.12$, $p < 0.01$), patriotism ($\beta = 0.15$, $t = 2.29$, $p = 0.02$) was a direct predictor of media consumption. In other words, the more that American respondents exhibited patriotism, the more Olympic media they consumed daily.

When controlling for both age and Olympic fanship, for Saudi respondents ($c^2_{(6, N = 780)} = 183.48$, $p < 0.01$, Nagelkerke $R^2 = 0.28$), patriotism ($\beta = 0.46$, Wald $c^2 = 12.39$, $p < 0.01$) was a direct predictor of second-screen usage. In other words, the more that Saudi respondents exhibited patriotism, the more likely they were to be second-screen users. None of the nationalistic qualities predicted second-screen usage for American respondents.

IMPLICATIONS & RECOMMENDATIONS

- Being any kind of fan does NOT predict Olympic media consumption.
- Saudi social media use MUCH more prevalent for Olympic media than U.S.
- Saudi smartphone use #1 for checking in; #2 for second screen (Social TV).
- Many of the same motivations, but...
- Saudi > USA on self esteem.
- USA > Saudi on information seeking.
- Media consumption driven by habitual use & escape in both nations.
- Saudi Arabia: Relationship Building leads to Media Consumption.
- United States: Information Seeking leads to Media Consumption.

RECOMMENDATIONS FOR FUTURE INSIGHTS

- Survey SA respondents regarding sports beyond the Olympics to determine consistent/temporary trends with the Olympics.
- Survey SA respondents regarding as to what activities feed their patriotism and internationalism (as this will explain desire for Olympic consumption.
- Survey SA respondents regarding how they use the Olympics to build relationships.
- Survey SA respondents regarding why they opt for harder-to-monetize social media consumption over legacy media options (television)
- Develop a SA-specific scale to accurately reflect SA sports fan attitudes and behaviors.
- Survey broader international samples to reveal perceived primary barriers to a Saudi-hosted Olympic Games.
- Conduct focus groups of SA Olympic fans to determine whether their preferences are different than what media is currently offering.
- Utilize qualitative interviews with IOC leaders/Olympic Channel regarding how to better position SA for hosting and/or consuming the Olympics.
- Initiate projective assessment toolsto determine current international perceptions of SA.