



UK Sports Integrity Index 2017

MEASURING THE
PERCEIVED LEVEL
OF INTEGRITY OF THE
TOP 12 PROFESSIONAL
SPORTS IN THE UK

Portland



Foreword

Genuine competition is at the heart of all sport.

The drama and the passion, the extreme highs and the heart-breaking lows, the wonderful comebacks and the true-underdog stories. All of these require fair and honest competition. Integrity on the part of the sportsmen and women, the organisers, the referees and the governing bodies reassures us that what we are watching is real and anyone could win. Competition is what fills stadia, sells season tickets and TV subscriptions, creates heroes, generates shirt sales and captures the imagination of billions around the world.

However, recent scandals across many major sports, including doping, match-fixing, bribes, corruption and cover-ups have all contributed to the perception that on some occasions, there is not an even playing field.

For some sports, this is more of a pressing issue.

In our inaugural UK Sports Integrity Index, we have sought to understand which sports are the most and the least trusted; what issues underpin this lack of faith; and how likely integrity-related issues are to make consumers stop watching certain sports.

For football, high-profile governance issues – such as major financial corruption and the criminal investigations into FIFA – have contributed to it being the least trusted sport in the UK.

In our research, **62%** of football fans said they think financial corruption is an issue in the sport.

01

Darts

02

Golf

03

*Rugby
Union*

04

Snooker

05

*Rugby
League*

06

Cricket

Corruption is not the only problem: **80%** of athletics fans, for example, think performance enhancing drugs are a problem within the sport.

This is nothing new. Doping scandals in athletics have been prevalent for decades and football is never far from controversy.

However, there is evidence to suggest audiences are becoming more sensitive to serious reputational issues. Our research has found that a majority (**52%**) of people would be likely to stop watching professional sports if integrity issues are seen to persist.

Why has this happened?

The business of sport is growing. This has led to greater professionalisation, an increased demand for higher revenues and more scrutiny from politicians, media and consumers. Reputation and trust matters more than ever.

Sponsors have shown willing to withdraw support for sports with reputational issues. Rabobank stopped sponsoring their cycling team following the Lance Armstrong scandal; Sony, Emirates, Castrol, Continental and Johnson and Johnson dropped FIFA following a series of scandals; Adidas has dropped the IAAF after the Russian doping crisis; and Head has ditched Bernard Tomic after his Wimbledon antics.

And it's not just nervous sponsors that pose a risk to reputationally challenged sports and teams. Blackpool FC supporters boycotted the League Two play-off final in protest at the running of the club and the NFL remains perpetually dogged by the growing concussion crisis.

Some may argue this is meaningless. Football may be tainted by various scandals – both in FIFA and the domestic game – but stadiums still sell-out and viewing figures remain high, the Olympics are still a global treasure and millions line the streets for the Tour De France.

However, this was the attitude of major businesses immediately post-2008: creating jobs and making money was all that mattered.

This belief has been shown to be false.

Over the last decade, a deterioration in trust has severely impacted the operating environments of major corporates across all sectors. From greater financial regulation to plain packaging; from impending legislation on the gig economy to the sugar tax.

These examples demonstrate a growing trend: if corporates cannot be trusted by the public, politicians or the media to behave in a responsible way, then ultimately a sector's operating environment will be impaired.

Business has learnt the hard way that the trust is as much based on perception as it is on practice, but in a post-2008 global environment of increased corporate-cynicism, it is incumbent on corporates to earn the trust of consumers and legislators through good behaviours and good practice.

In sport, as in business, if major reputational issues are seen to persist, greater scrutiny, criticism and in some cases, direct intervention is possible.

Indeed, the Government has recently demonstrated its willingness to use funding as a mechanism to enforce change in governing bodies it deems require it. British Cycling has been forced to make governance reforms or lose essential funding, and earlier this year the FA finally approved reforms, having been threatened with a £15m cut.

As it becomes increasingly professionalised and the number of issues grow, it is difficult to believe that sport will continue to be able to fall back on the argument that if the fans keep showing up, there is nothing to worry about.

Integrity matters, not just for the product on show but for the people that spend money on, and invest money in, sport. It is now up to teams, clubs and governing bodies to show they can live with the front pages as well as the back pages, or people might stop turning up.

07

Tennis

08

Cycling

09

Athletics

10

Boxing

11

*Horse
Racing*

12

Football

Methodology

The Sports Integrity Index is based upon robust polling with 2,110 members of the British general public representative for age, gender and region, conducted in June 2017 by Populus.

The calculation of integrity was based on the perceived likelihood of the professional sport being implicated in one of four issues:

- Match, point or race fixing
- Players, racers or athletes using performance enhancing drugs
- Financial corruption (including bribes, bungs and other financial irregularities)
- Cover up stories and scandals

The total score for each issue was weighted by the perceived impact that the issue would have on consumers likelihood of watching the sport.

The mathematical formula for the basis of this index is opposite.



$$\text{Integrity} = M \times MI + P \times PI + F \times FI + C \times CI$$

M Perceived likelihood of match, point or race fixing

P Perceived likelihood of players, racers or athletes using performance enhancing drugs

F Perceived likelihood of involvement in financial corruption (including bribes, bungs and other financial irregularities)

C Perceived likelihood of cover up stories and scandals

I Impact on likelihood of watching sport

Key findings

Overall integrity

Darts is perceived to have the highest overall level of integrity of the top 12 professional sports in the UK due to the perceived likelihood of players using performance enhancing drugs or the sport being involved in cover ups and scandals.

In contrast, football is perceived to have the lowest overall level of integrity due to the high perceived likelihood of financial corruption and cover ups and scandals. This lack of trust extends to other issues, as football is also considered likely to be involved in match fixing and player doping.



**62% OF FOOTBALL FANS
BELIEVE FOOTBALL IS MOST
LIKELY TO BE ASSOCIATED
WITH FINANCIAL CORRUPTION.**



80% OF ATHLETICS FANS BELIEVE ATHLETICS IS MOST LIKELY TO BE ASSOCIATED WITH PERFORMANCE ENHANCING DRUGS.

By Issue

1

The issue most likely to affect viewing figures is match, point or race fixing with horseracing, football, boxing and athletics perceived to be the most likely to be implicated.

2

This is closely followed by players, racers or athletes using performance enhancing drugs with athletics, cycling, boxing and football felt to be the most likely to be implicated.

3

The next most important issue is financial corruption with football felt to be most likely to be implicated closely followed by horseracing, boxing and athletics.

4

The issue least likely to affect viewing figures is involvement in cover ups and scandals but this is still an important issue for football, horseracing, athletics and cycling.



65% OF CYCLING FANS BELIEVE CYCLING IS MOST LIKELY TO BE ASSOCIATED WITH PERFORMANCE ENHANCING DRUGS.

By Demographic

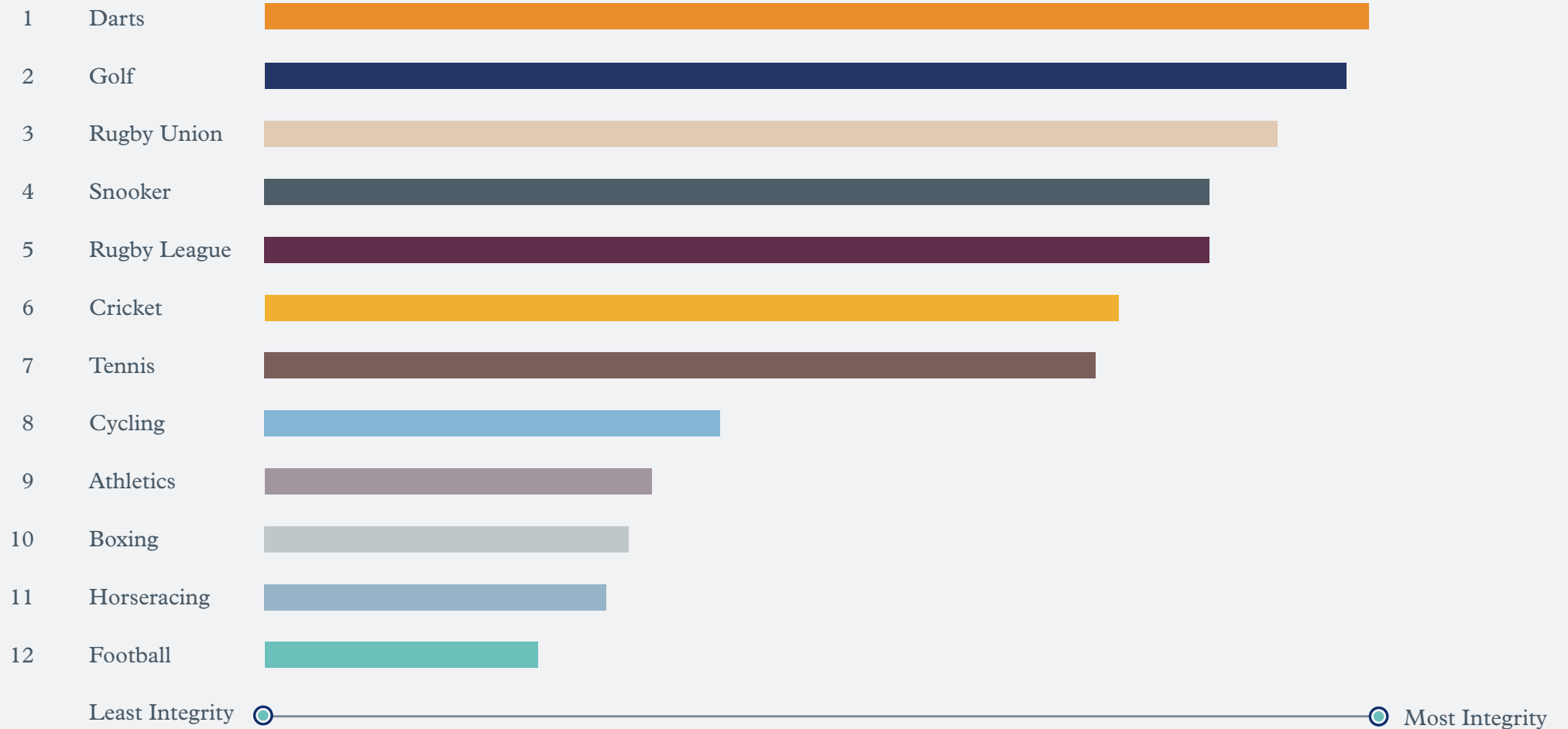
1

Older age groups are consistently more likely to stop watching a sport due to issues of integrity, whilst the middle aged are the least likely to alter their viewing habits.

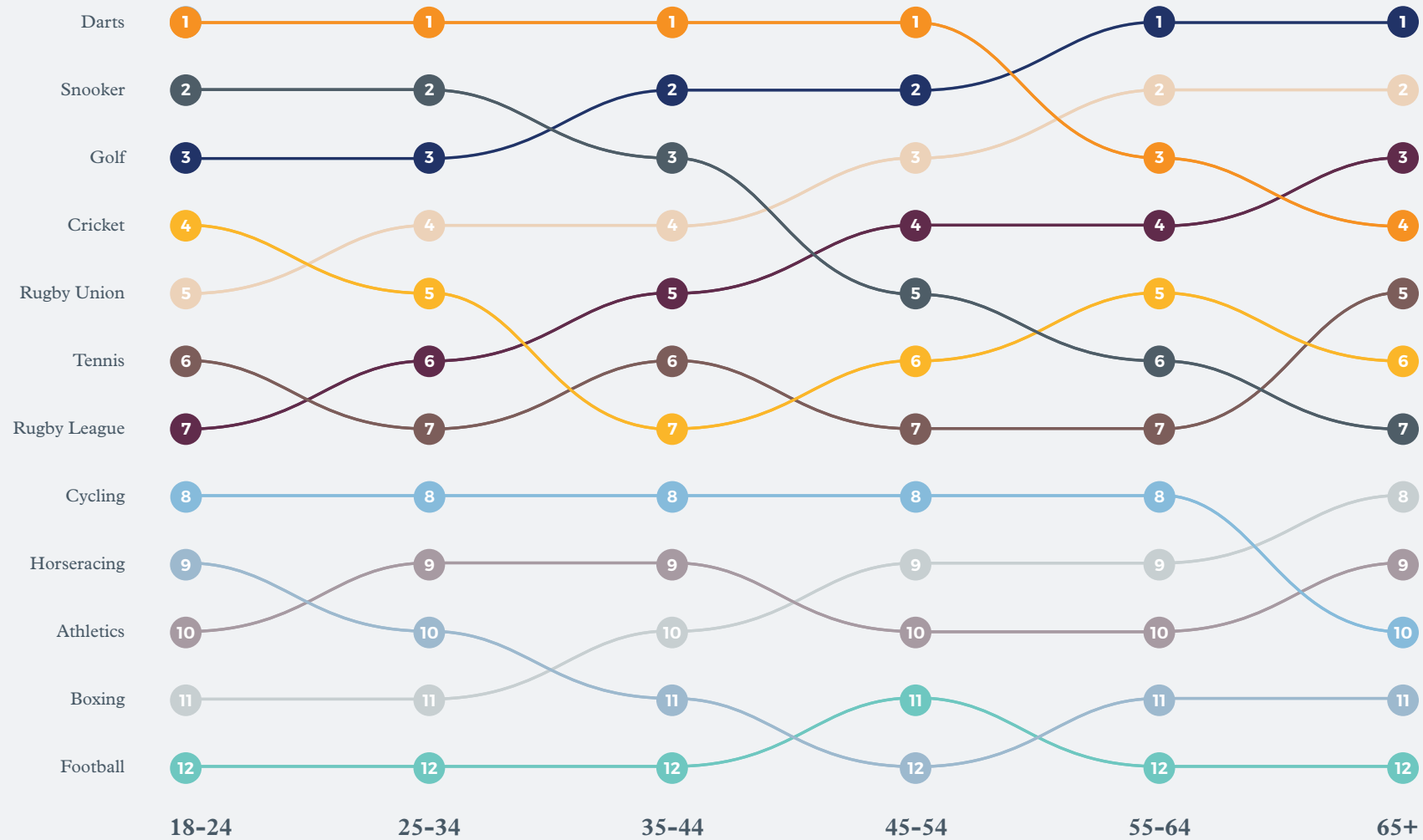
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Women are also consistently more likely than men to stop watching a sport due to issues of integrity.

Overall Integrity Index



Perceived integrity by age



Ranking of integrity by age

Key drivers of integrity

	Match, point or race fixing	Performance enhancing drugs	Financial corruption	Cover ups and scandals
Darts	3	1	2	1
Golf	1	2	1	2
Rugby Union	2	5	3	4
Snooker	6	3	6	3
Rugby League	4	6	4	5
Cricket	7	4	7	6
Tennis	5	7	5	7
Cycling	8	11	8	9
Athletics	9	12	9	11
Boxing	10	10	10	8
Horse Racing	12	8	11	10
Football	11	9	12	12

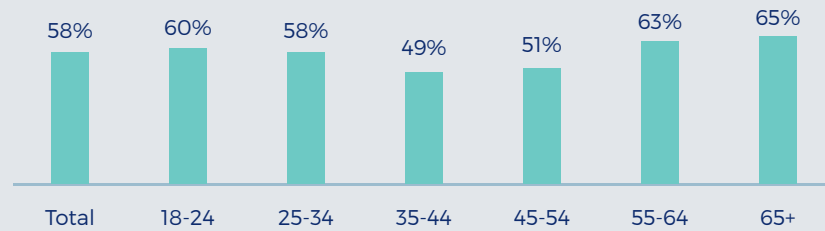
Ranking of integrity by issue

Impact on viewing by age

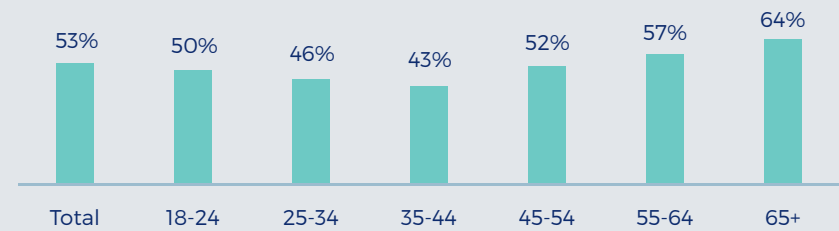
How likely would you be to stop watching professional sports (live or on TV) due to the following issues?
[Net likely (%)]

52% OF PEOPLE WOULD STOP WATCHING PROFESSIONAL SPORTS (LIVE OR ON TV) DUE TO SCANDALS.

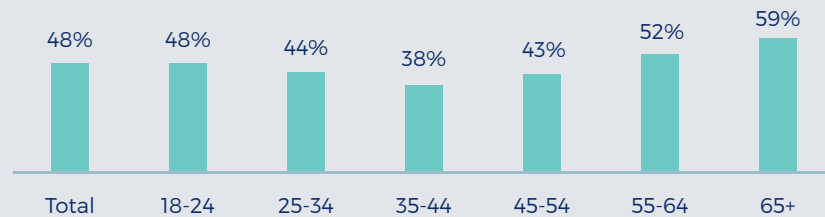
Match, point or race fixing



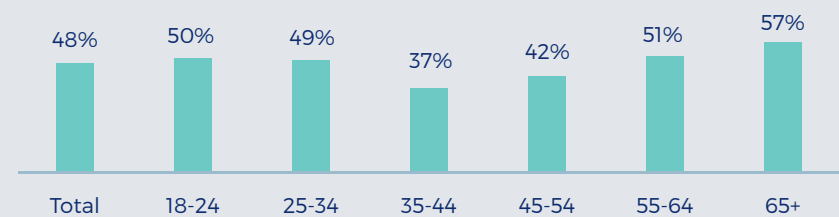
Performance enhancing drugs



Financial corruption



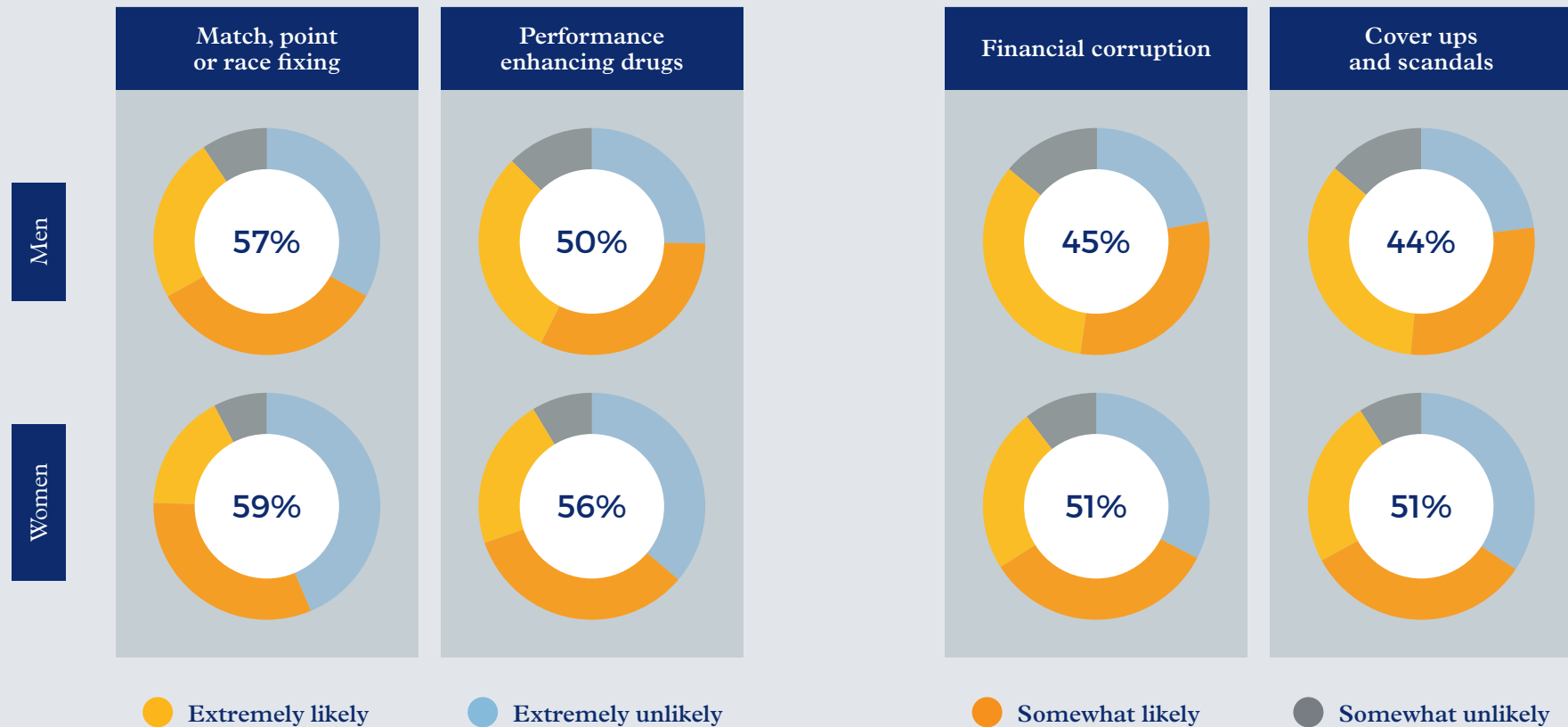
Cover ups and scandals



Likelihood of no longer watching professional sports by issue and by age

Impact on viewing by gender

How likely would you be to stop watching professional sports (live or on TV) due to the following issues?
[Net likely (%)]



About Portland

Portland is an international communications consultancy trusted by some of the highest profile organisations, governments and individuals in the world.

We are pioneers in integrated communications campaigns engaging politicians, global opinion leaders, decision-makers, key stakeholders, consumers and media.

We help clients manage their reputation, improve their visibility and media coverage – and deliver global communications campaigns across multiple platforms.

Through offices in London, Doha, Nairobi, New York, Washington DC and Singapore, Portland has supported clients in more than 85 countries.



Research and Insights at Portland

We uncover the crucial insights that champion successful campaigns. We identify the right audience, the right channels and the right message to realise each client's version of success.

Every client is different, so we design bespoke methodologies that meet their needs, time and budget. We use a mixture of primary and secondary research techniques to address a range of objectives including perceptions evaluation, message testing, impact measurement and reputation analysis. We work closely with our consultants across the globe to identify the insights that can inform compelling campaigns and communications strategies.

Portland believes developing an insightful strategy and campaign is central to any communications plan and maintaining any company's image. Discovering that insight is done through Portland's comprehensive and creative research offering.

insights@portland-communications.com

Portland Sports

We use our experience working with the world's largest companies, leading NGOs and Governments to help sports teams, clubs, competitions and governing bodies with their communications and reputation issues.

More than ever, the varied challenges faced by sports organisations means they need to engage with new stakeholders to build support, and actively protect and manage their reputations.

We provide integrated communications and reputation support, issues and crisis management and public affairs support in the sports sector. We have experience dealing with some of the most high-profile sports crises, helping organisations communicate with their priority audiences from supporters to sponsors, politicians to the media.

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Portland

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