

**REPORT**

# HOW THE WORLD'S BIGGEST SPORTS PROPERTIES ENGAGED FANS IN 2020

# CONTENTS

INTRODUCTION	P. 3
METHODOLOGY	P. 4
GLOBAL SPORTS OVERVIEW	P. 6
DIGITAL ENGAGEMENT	P. 11
TV BROADCAST REACH	P. 15

# INTRODUCTION

The connection between fans and sport is a continually evolving relationship, with new trends and dynamics developing every year. The COVID-19 pandemic has accelerated the changes in these interactions, driving a more two-way and interactive communication.



Many of the largest global sports entities have been at the forefront of building their fan bases and actively engaging them to develop a natural and mutually beneficial conversation. Fans around the world expect more content and new ways to access their favourite events. Sports entities have responded by creating new content types, with greater volume, increased frequency and higher value

engagements. And here at Nielsen we are identifying some of the most powerful strategies fuelling this growth.

- Building storytelling that excites fans, using elements such as highlights or past and present legends.
- Celebrating successes and victories, especially in the case of static content posts.
- Selecting the duration and format specific to the social media channel that is being used.

In this report Nielsen outlines in more detail the data behind how some world-leading sports entities have continued to engage and grow these significant and truly global fan bases across Asia and globally.

## **Mike Wragg**

MD, Nielsen Sports APAC

# METHODOLOGY

For this report we've chosen to focus on traditional sports entities and primary events. We identified 20 market leaders (see following page for list of sports properties) based on their digital footprint, fan growth and fan engagement. Esports, individual teams/clubs and individual athletes are, of course, also important, and the subject of other Nielsen reports have been considered.

For the 20 selected sports entities, we have used a combination of data sources to better understand the size, scope and engagement of these fan bases. We added additional insight from the Nielsen Sports network of global sports consultants and other leading industry experts.



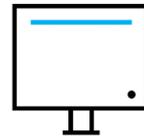
## FAN BASE SIZE

Nielsen Fan Insights global syndicated sports data (available from 35 countries), Nielsen Sports has identified the fan base, demographics and media habits of the fans around the world.



## DIGITAL IMPACT

Worldwide metrics including organic video view, total video views, engagement per post, follower sizing and top-performing content provide the insights to understand how to keep and grow a fan base.



## TV AUDIENCE

Cumulative reach and broadcast hours in 18 markets (across all formats including pre/post game, live game, re-airs, delayed and other dedicated shows) provide insights enabling Nielsen Sports to provide the context to begin to understand the magnitude of the TV coverage these sports properties are able to achieve.

## ABOUT CUMULATIVE REACH

Cumulative reach indicates the number of unique viewers who tuned in to watch at least one minute of TV broadcast. This is useful to understand the total population reach, but gives only limited understanding of deeper fan engagement so needs to be read in conjunction with the digital and fan survey data contained in this report.

To be clearer about this limitation:

- The global population is 7.9 billion people, of whom 4.3 billion are counted within the metered TV universe across 95 countries.
- We have selected 18 major markets that together account for 2.4 billion of the metered TV universe.
- Within this, 1.6 billion are Asian markets and China alone is 1.3 billion.
- The remaining 0.8 billion are non-Asia markets, including the core commercial sport markets of the USA and West Europe's 5 largest countries.
- All non-metered channels, which are very significant for some of the sports properties considered here, are excluded.

Key aspects, such as whether the event is FTA, Pay TV or OTT will impact the overall numbers. Also, not all channels are metered, which means some countries and sports are less well captured. For the US, this report contains only national numbers, so misses regional TV audiences, which are important for some sports.

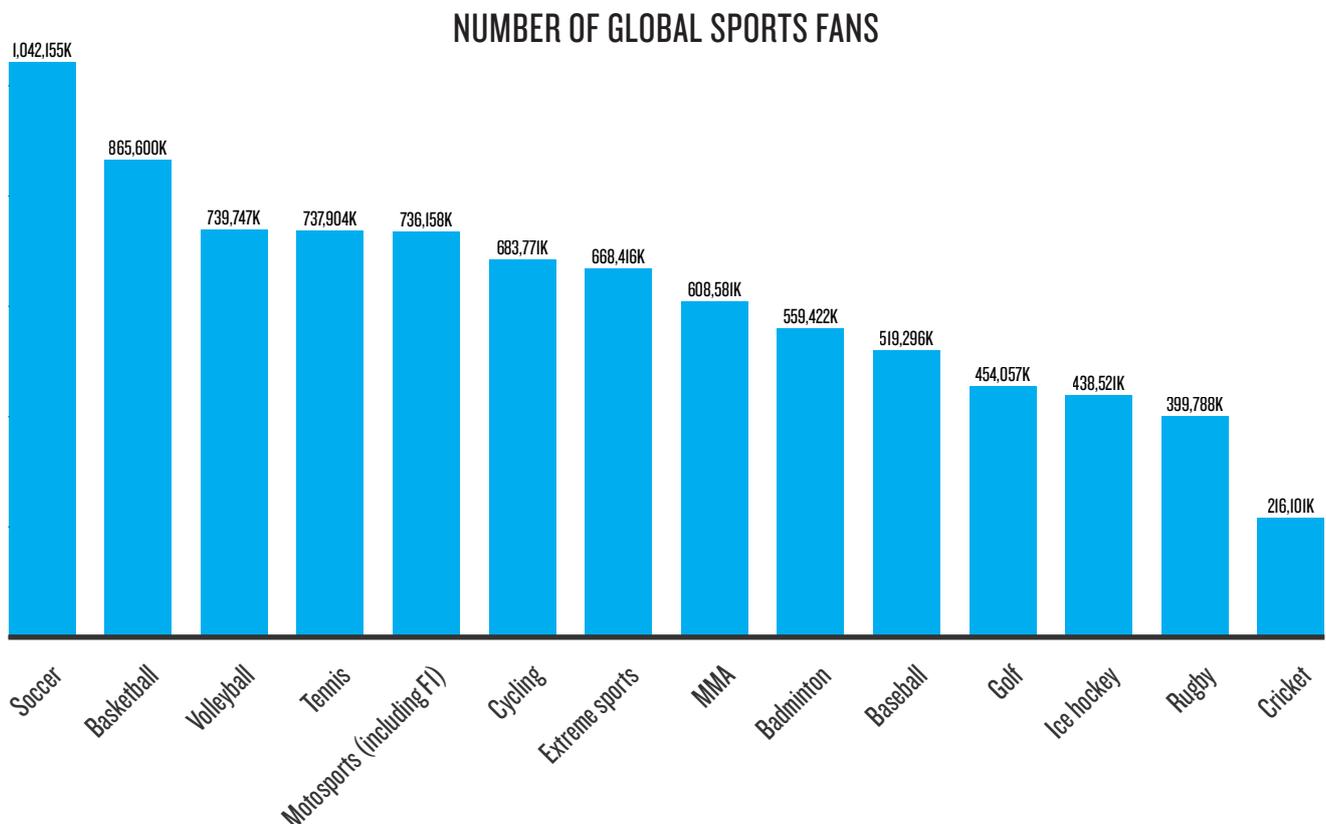
## TV BROADCAST METHODOLOGY

The cumulative reach figures contained within this report refer to the following events based on figures available for metered channels in 18 countries (by population size: China, USA, Indonesia, Brazil, Mexico, Japan, Philippines, Vietnam, Germany, Thailand, UK, France, Italy, South Africa, Myanmar, Spain, Argentina, Malaysia).

PROPERTY	SEASON/EVENT DATA	COVID SCHEDULING IMPACT	NUMBER OF MARKETS WITH METERED CHANNEL BROADCAST
The Australian Open	Australian Open 2020	Event took place as scheduled	13 Markets out of 18
Bellator	Bellator 2020	Some events cancelled	3 Markets out of 18
Bundesliga	Bundesliga 2019/2020 Season	Season delayed and completed later than scheduled	14 Markets out of 18
The Premier League	EPL 2019/2020 Season	Season delayed and completed later than scheduled	14 Markets out of 18
Formula 1	F1 2020 Season	Some races cancelled	15 Markets out of 18
Roland Garros	Roland Garros 2020	Event moved from May/June to Sept/Oct	11 Markets out of 18
La Liga	La Liga 2019/2020 Season	Season delayed and completed later than scheduled	12 Markets out of 18
MLB	MLB 2020 Season	Significantly shortened season and delayed start	13 Markets out of 18
MLS	MLS 2020 Season	Season delayed and completed later than scheduled	12 Markets out of 18
MotoGP	MotoGP 2020	Some events cancelled	15 Markets out of 18
NASCAR	NASCAR 2020	Full schedule with double header events required	11 Markets out of 18
NBA	NBA 2019/2020 Season	Season delayed and completed later than scheduled	12 Markets out of 18
NFL	NFL 2020 Season (including post-season in Jan/Feb 2021)	Minor schedule changes, but full season completed on time	14 Markets out of 18
NHL	NHL 2020	Season suspended and revised format required to complete the season	6 Markets out of 18
ONE Championship	ONE Championship 2020	Some events cancelled	8 Markets out of 18
Tour de France	Tour de France 2020	Event moved from June/July to Aug/Sept	14 Markets out of 18
UEFA Champions League	UCL 2019/2020 Season	Competition delayed and completed later than scheduled	14 Markets out of 18
UFC	UFC 2020	Some events cancelled	12 Markets out of 18
The US Open (Tennis)	US Open 2020	Event took place as scheduled	13 Markets out of 18
Wimbledon	Wimbledon 2019	2020 Event Cancelled	15 Markets out of 18

## SPORT IS AN IMPORTANT PART OF LIFE FOR A HUGE PROPORTION OF THE WORLD'S POPULATION...

Global interest in sport continues to be stable, with many of the top sports around the world achieving high levels of fandom. This high level of sports interest is reflected in the interest of the sports properties themselves and provides the lifeblood of the sports industry.



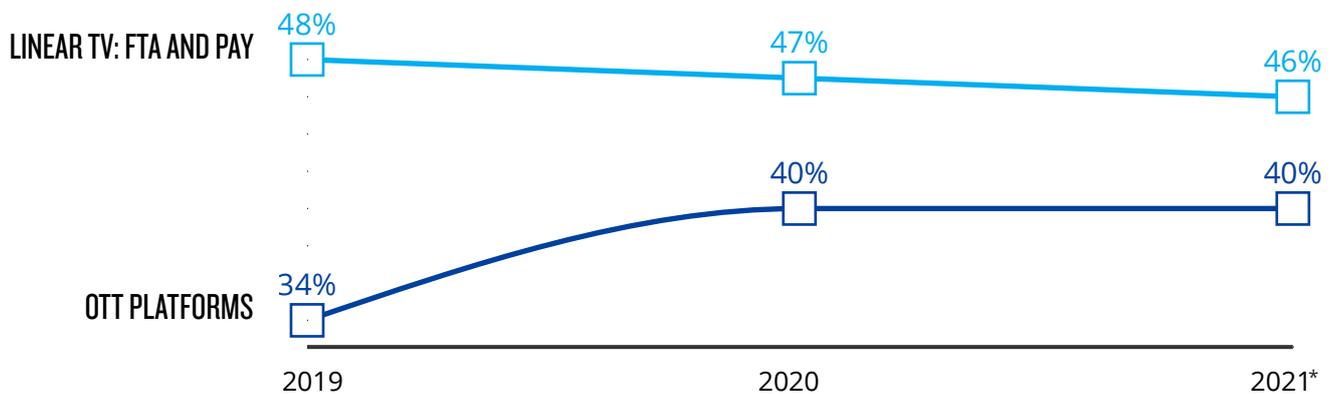
Source: Nielsen Fan Insights 2020 (Argentina, Australia, Belgium, Brazil, Canada, China, Columbia, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Netherlands, New Zealand, Nigeria, Philippines, Poland, Portugal, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Switzerland, Thailand, Turkey, UAE, UK, US, Vietnam)

Q: TOP 2 BOX Please tell us how interested you are in each of the following sports – in terms of whether you attend events, watch that sport on TV, follow it online, listen to the radio, or read about it in newspapers or magazines

## ... BUT THE WAY WE CONSUME IT IS CHANGING QUITE FAST

Over the last few years, we have seen a slight decrease globally in the percentage of people who use TV as a source of their live sports content, while newly emerging OTT platforms like Amazon Prime and DAZN have increased. This has resulted in rights holders striking significant media rights deals either as the primary broadcaster or supplementary deals to further meet the needs of their fan bases and locate their content where their audience now resides.

### HOW FANS WATCH LIVE SPORTS CONTENT



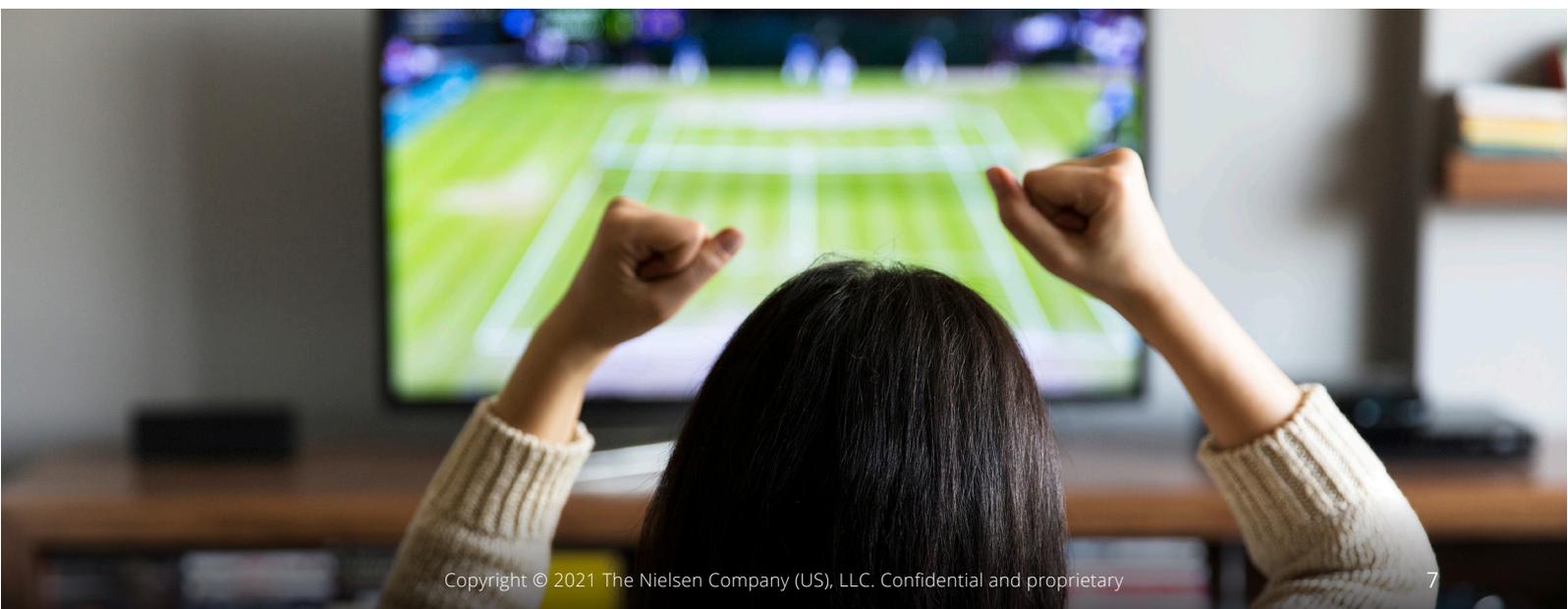
\*Note: Aggregated full year 2019, aggregated full year 2020, Jan-Mar 2021

Source: Nielsen Fan Insights 2019 - Mar 2021 (Brazil, China, France, Germany, India, Italy, Japan, Russia, South Korea, Spain, UK, US)

Q: How often do you watch sport on...?

**“WE NEED TO PROVIDE EASIER ACCESS TO FIT WITHIN THEIR LIVES; JUST SITTING IN FRONT OF THE TV ON THE COUCH AND WATCHING IS NOT ALWAYS POSSIBLE FOR OUR VIEWERS”**

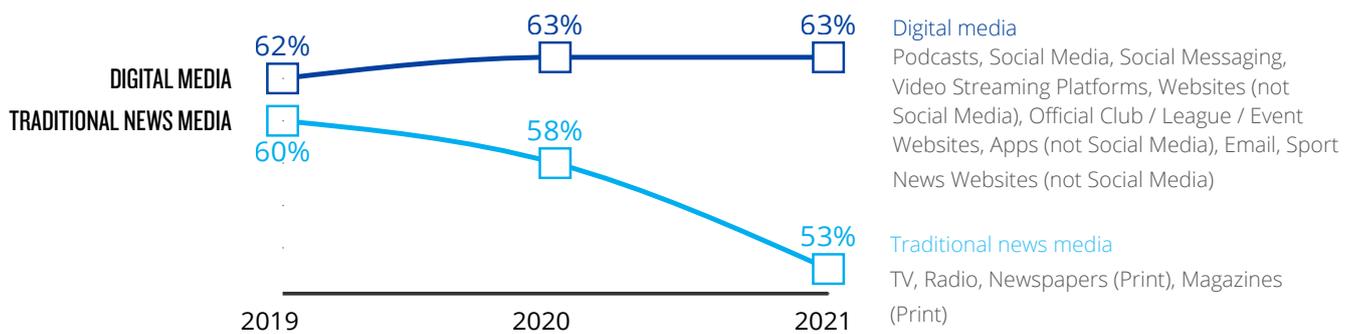
**Vitto Lazatin** - Head of Content Acquisition Signal, Philippines



## ... AS IS THE WAY FANS STAY INFORMED AND ENGAGED

Where fans go for their news has seen an acceleration in the growth of digital media channels. By 2019 the emphasis on digital media channels had already surpassed traditional media. In the last two years the gap has continued to increase considerably. This growth also reflects the number of tools available to rights holders to reach their fan bases from social media accounts, to direct email, owned assets such as websites and branching out into podcasts and social messaging further continues.

**% OF FANS WHO CONSUME NEWS ABOUT SPORTS**

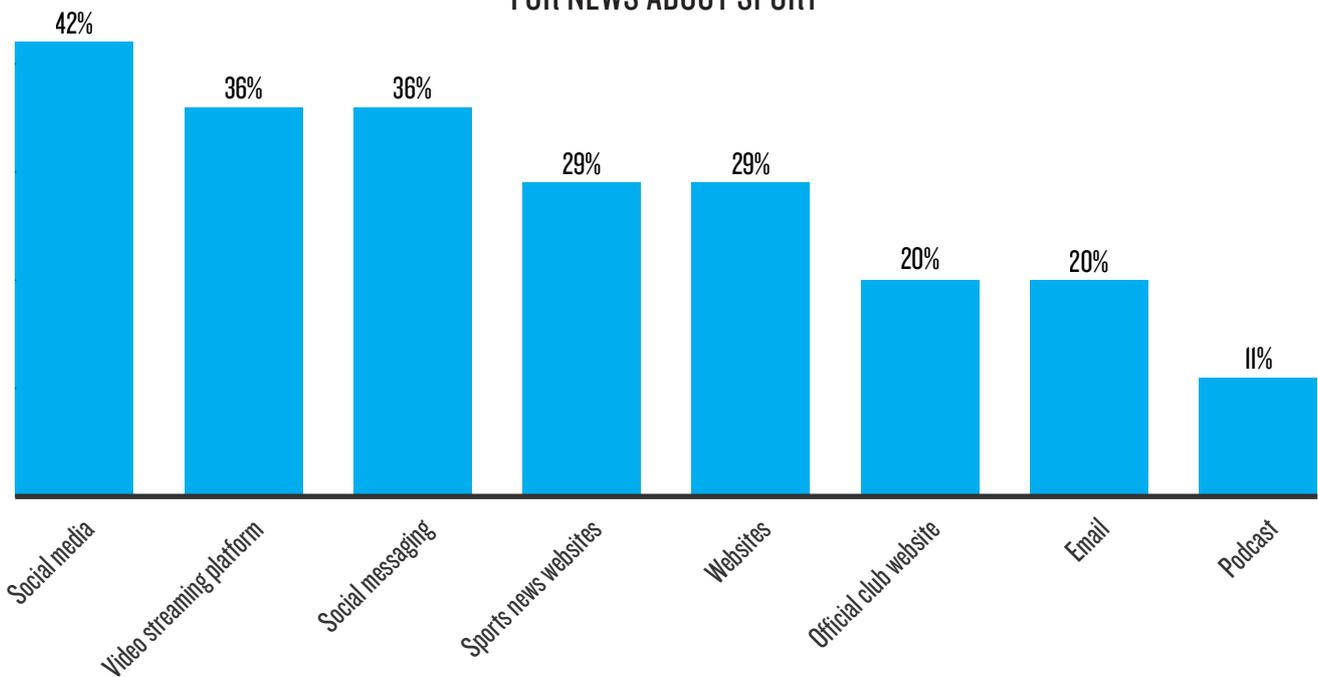


Source: Nielsen Fan Insights 2019-21 (Brazil, China, France, Germany, India, Italy, Japan, Russia, South Korea, Spain, UK, US)  
Q: How often do you use the following media for news about sport?



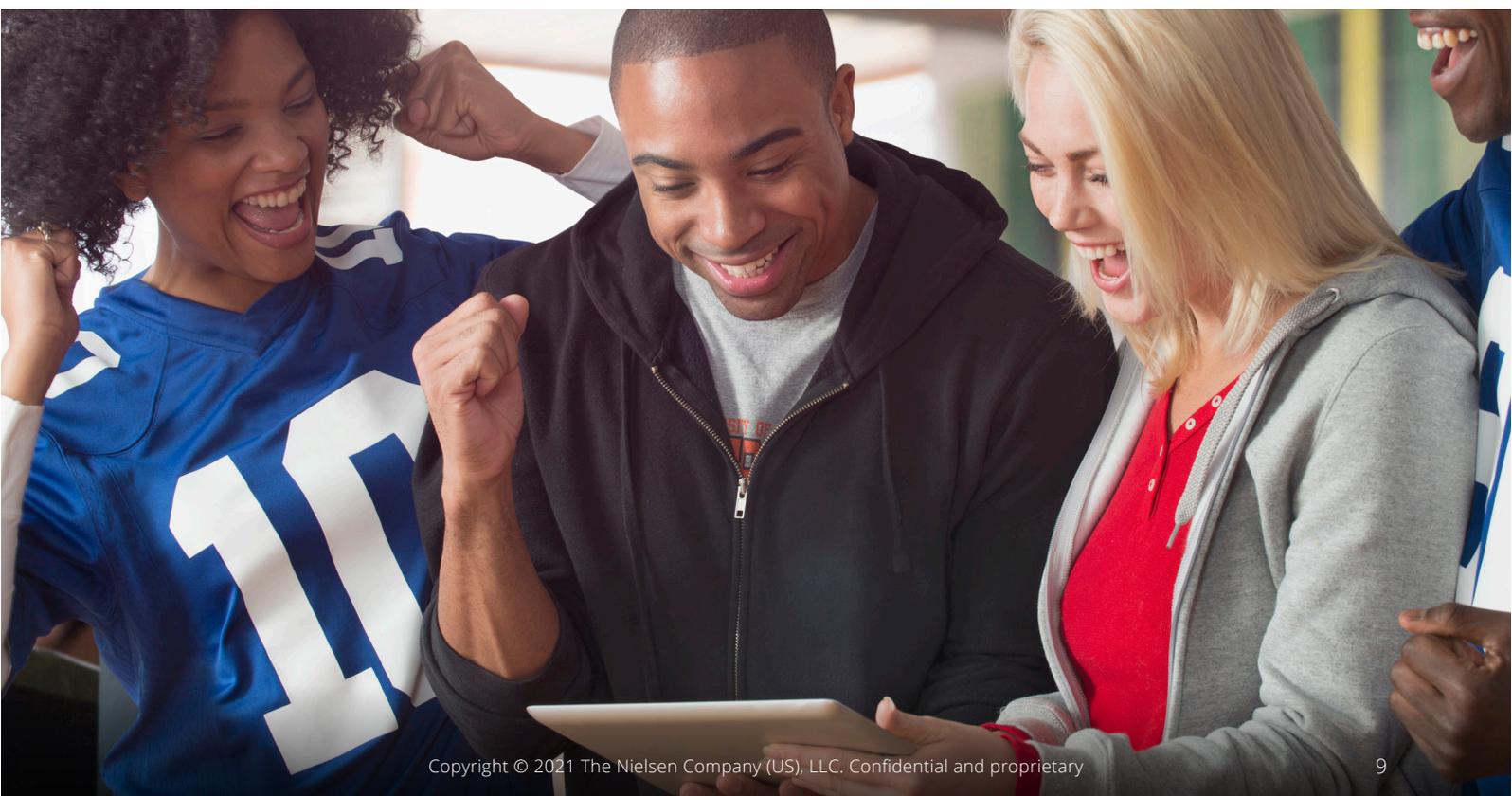
We can see that the most prevalent of these channels are coming from social media and social messaging sources. Video streaming platforms also now outperform all other types of news sources, including websites, news websites and club websites.

### PERCENTAGE OF FANS WHO USE DIGITAL MEDIA PLATFORM FOR NEWS ABOUT SPORT



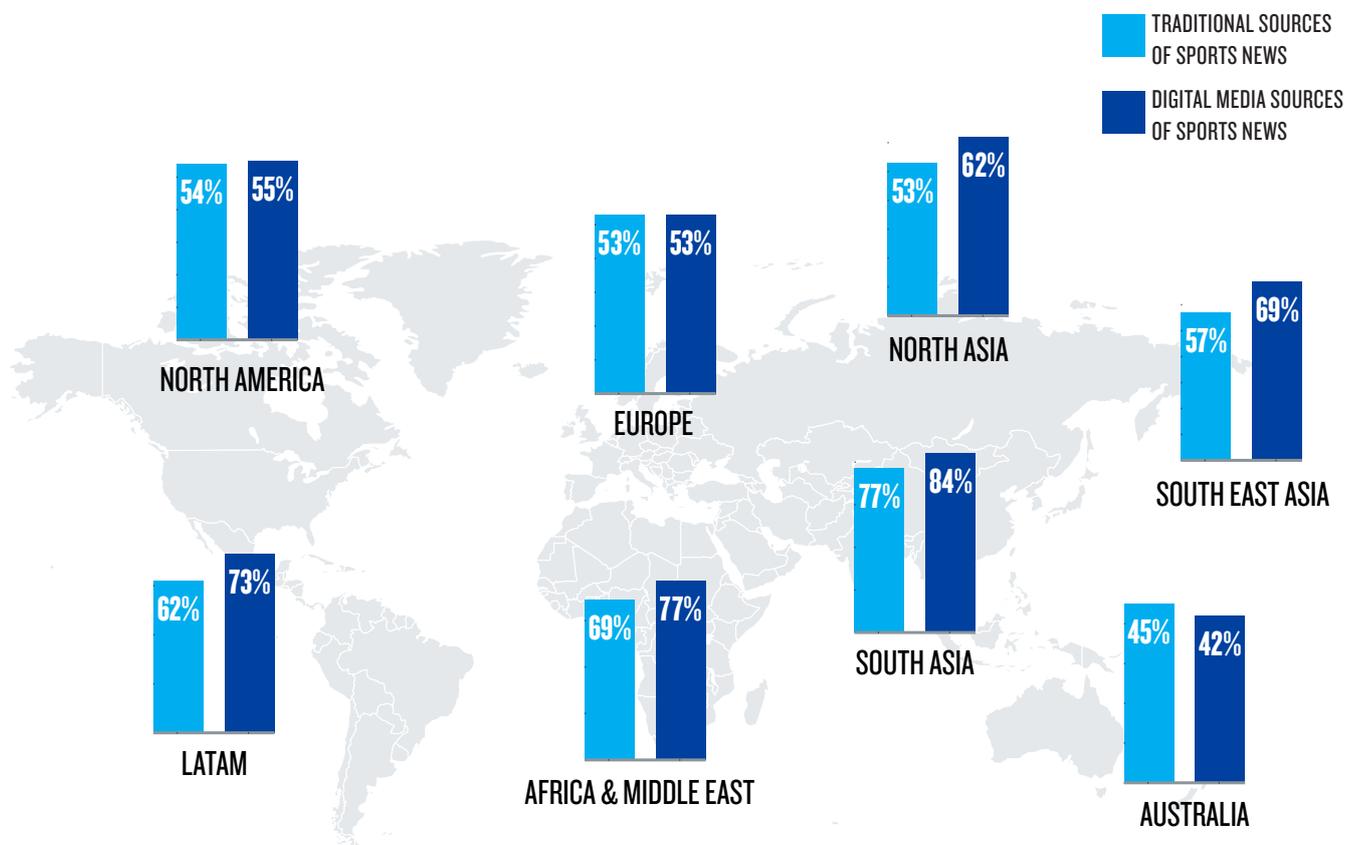
Source: Nielsen Fan Insights 2020 (Argentina, Australia, Belgium, Brazil, Canada, China, Columbia, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Netherlands, New Zealand, Nigeria, Philippines, Poland, Portugal, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Switzerland, Thailand, Turkey, UAE, UK, US, Vietnam)

Q: How often do you use the following media for news about sport?



We can see that more established and traditionally strong sports regions such as North America, Europe and Australasia have a more even split of fans using both traditional and digital sources for news, whereas in regions that have more recently developed their sporting infrastructure, such as LATAM and Asia, we see a greater emphasis on newer media types. This could be explained by several factors, such as younger fan bases who are more used to using digital as their main source of information for all things. And, in some markets there are less developed traditional media landscapes that have built up around a strong domestic sports landscape (compared to what we see in North America, Europe and Australasia). In North Asia we see a focus on new channels coming from China, where digital media has been embraced, with strong domestic brands such as Tencent, Alibaba, WeChat, Bytedance (Douyin) all developing a digitally native society.

### PERCENTAGE OF FANS WHO USE TRADITIONAL AND DIGITAL MEDIA FOR NEWS ABOUT SPORT (GEN POP %)

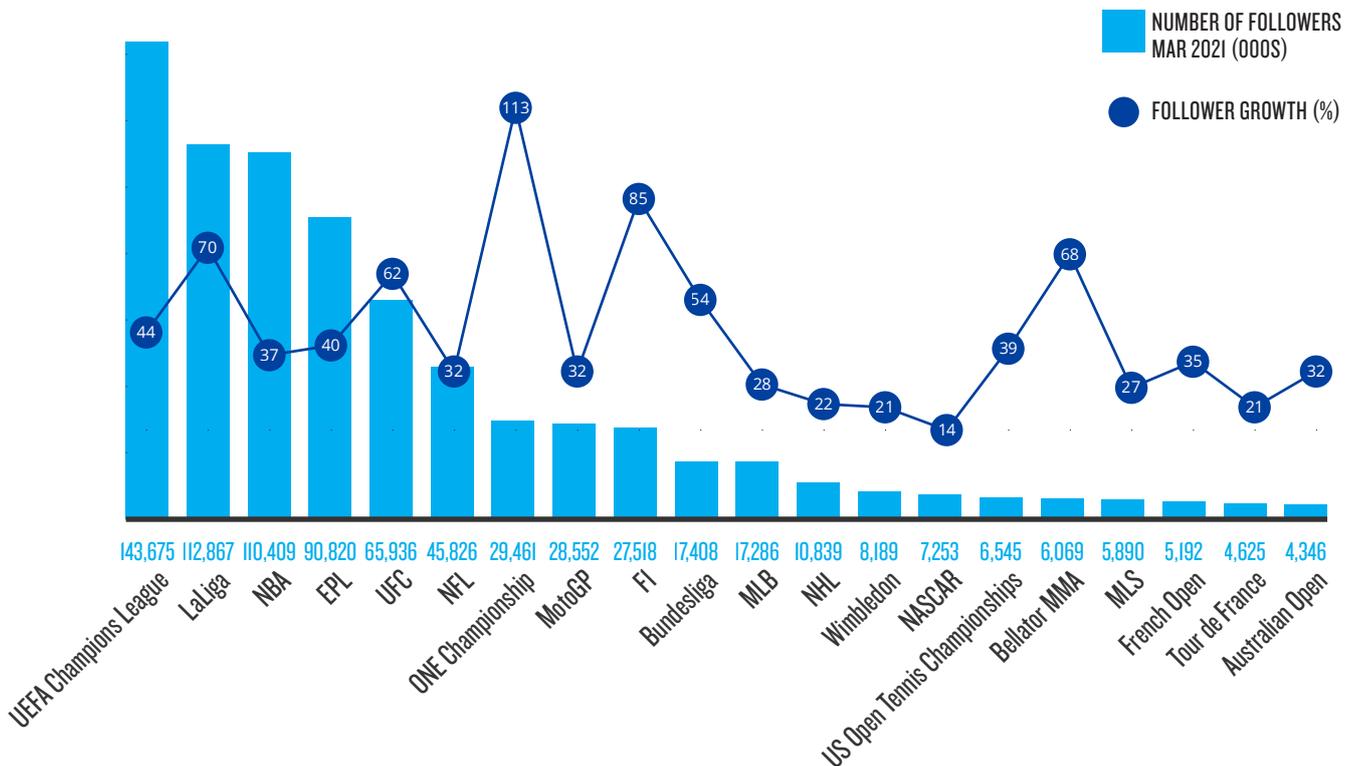


Source: Nielsen Fan Insights 2020 (Argentina, Australia, Belgium, Brazil, Canada, China, Columbia, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Netherlands, New Zealand, Nigeria, Philippines, Poland, Portugal, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Switzerland, Thailand, Turkey, UAE, UK, US, Vietnam)

# DIGITAL ENGAGEMENT BY MAJOR SPORTS PROPERTIES HAS ACCELERATED

As we can see from the growth in new media formats for both watching sport and getting sports news the proliferation of digital channels has grown considerably. Each of the top sport properties is able to grow, experiencing significant increases from 2019 to Q1 2021, with an average online fan base size of 37.4m and an average growth rate of 45%. Growth rate has especially been driven by properties that have evolved in their digital offering during the pandemic such as Formula 1, La Liga and by newer properties such as ONE Championship. In some cases, more established properties such as the NBA, NFL and Premier League have experienced slower growth rates in the last few years as they were already early trendsetters in this space several years ago.

## DIGITAL FOOTPRINT



Source: Jan 2019 - Mar 2021; Nielsen Analysis

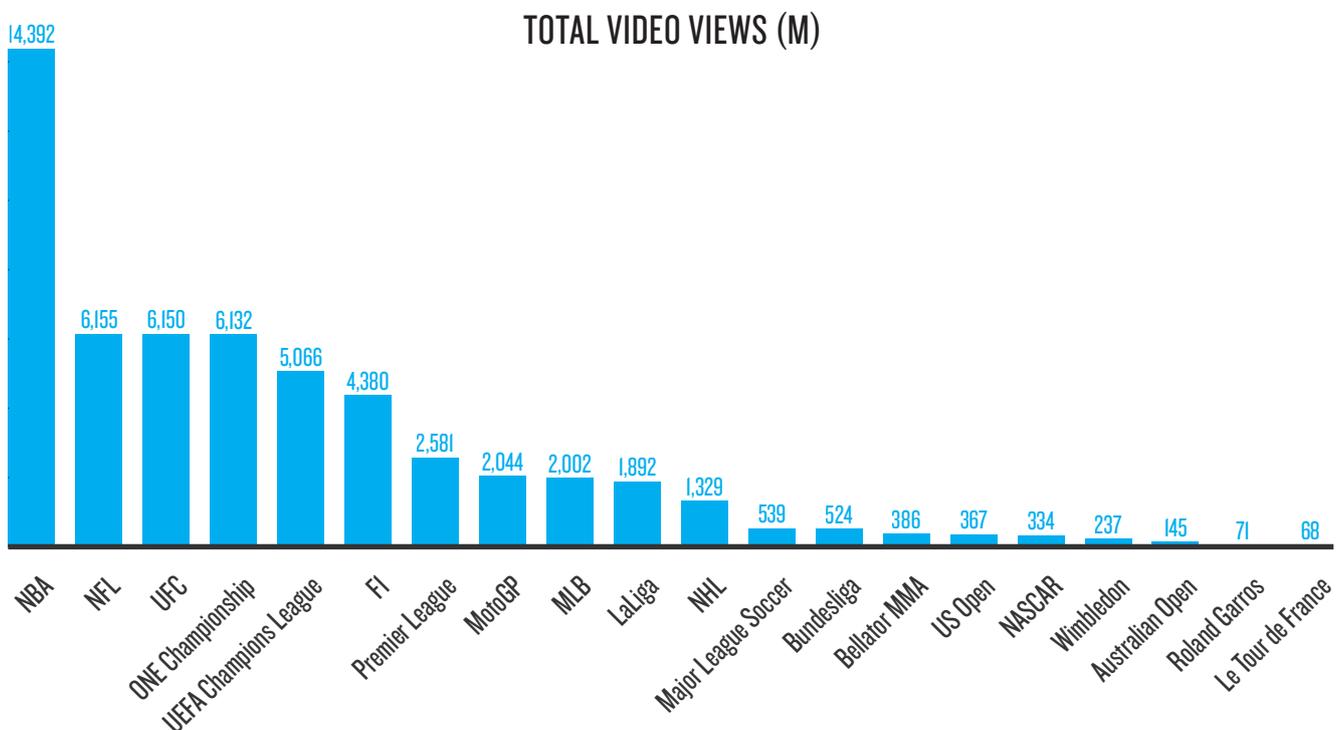
\*Digital Channels: Facebook, Instagram, YouTube

When it comes to digital fan bases, platforms show different patterns in size and growth. On average, Facebook has the widest fan base, followed by Instagram and YouTube (Avg FB fan base 18.1m, Avg IG fan base 15.7m, Avg YT fan base 3.5m). However, YouTube is growing faster than Instagram, while Instagram is growing more than Facebook (Avg growth YT 119%, Avg Growth IG 91%, Avg Growth FB 15%). Thus, on average, each property more than doubled its fan base on YouTube, and almost doubled its fan base on Instagram, and they still showed growth on Facebook. In absolute terms, Instagram is the platform with the highest growth, and each property on average gained 7.7m followers (Facebook 2.6m and YouTube 1.7m).

The sheer volume of content that is consumed by many of these top-performing properties is extremely significant, generating large numbers of video views across the three major platforms.

**“WE HAVE SEEN SIGNIFICANT GROWTH IN COMMUNITY/ PARTICIPATION AND FITNESS CONTENT. IN Q2 OF LAST YEAR, LIVE FITNESS CONTENT ON FACEBOOK WAS UP 75% AND ON INSTAGRAM UP 520%”**

**Joyee Biswas** - Head of Sports Partnerships, Facebook Asia-Pacific



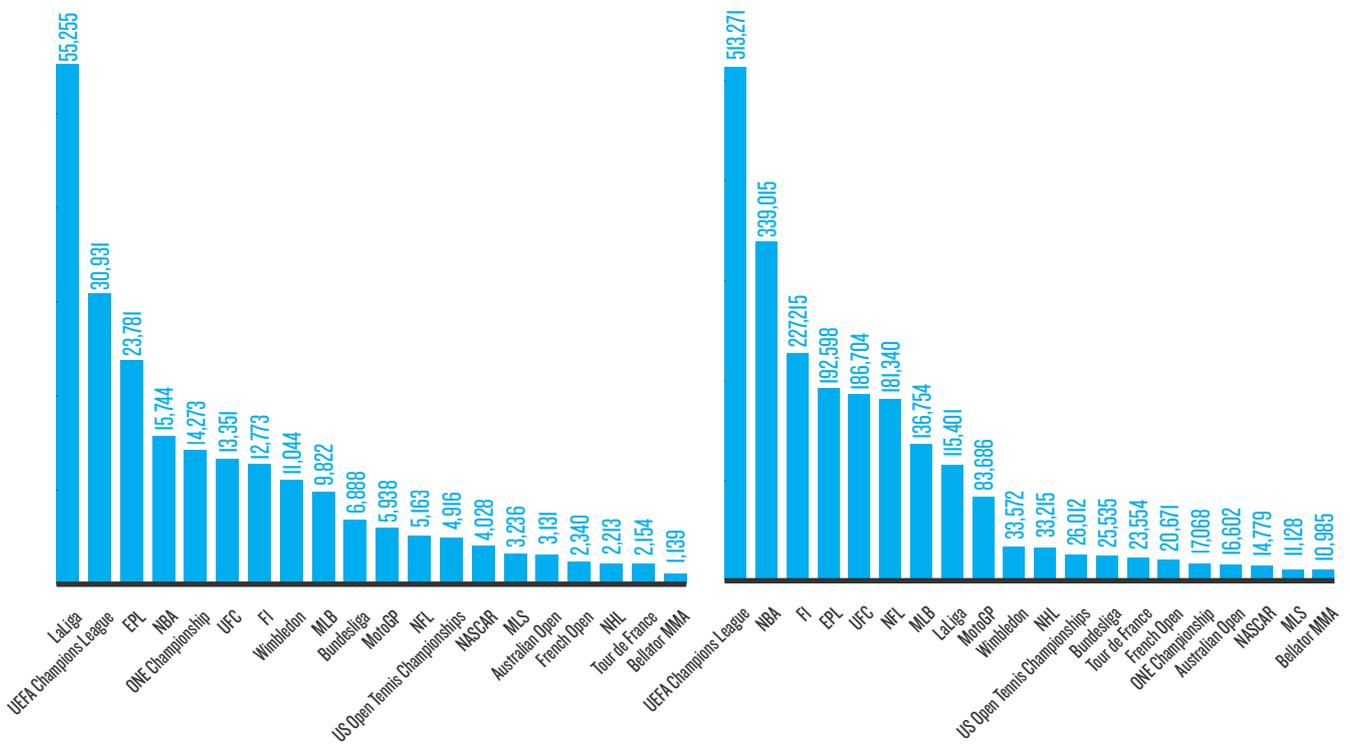
Source: Jan 2020 - Dec 2020; Nielsen Analysis

Broadly speaking, the trend we see with total engagements is linked to the number of posts. Those properties posting the most are also driving the highest number of engagements. The league format rights holders are putting out the most content driven by long seasons, with multiple matches every day/week, which helps them to continue to put out engaging fresh content on a regular basis.

## ENGAGEMENT PER POST

Facebook

Instagram



Source: Jan 2020 - Dec 2020; Nielsen Analysis



All different types of content can engage the fan base, and different sports find different ways to meet the need for entertainment and excitement. Best plays in team sports, best KO in fighting sports, and last lap and impressive accidents in motorsports are always able to collect high levels of interaction.



Content that can surprise and excite users through videos leveraging the emotions aroused by some specific moments of games/races or videos highlighting the humorous side generate high levels of engagement. Building storytelling around past and present legends excites fans and makes them more willing to engage with the content.



From a static content point of view, best performances in terms of interactions are those celebrating teams and players achievements or victories, as fans are always in the mood to celebrate important results. In general, static content performs better on Instagram.



Longer content on Facebook and keeping videos short on Instagram enable rights holders to drive high levels of engagement (i.e., static content and short videos work better on Instagram while longer videos - around 3 to 5 minutes - work better on Facebook).



The best rights holders relentlessly strive to come up with new ways to keep their fans engaged utilizing their existing contents and developing additional areas that can drive engagement and value.

**“AUDIENCES ARE BECOMING MORE DEMANDING; THERE NEEDS TO BE A LOT OF FLEXIBILITY IN WHAT YOU DELIVER AND HOW YOU DELIVER”**

**Joyee Biswas** - Head of Sports Partnerships, Facebook Asia-Pacific

## TV STILL THE MAJOR PLAYER

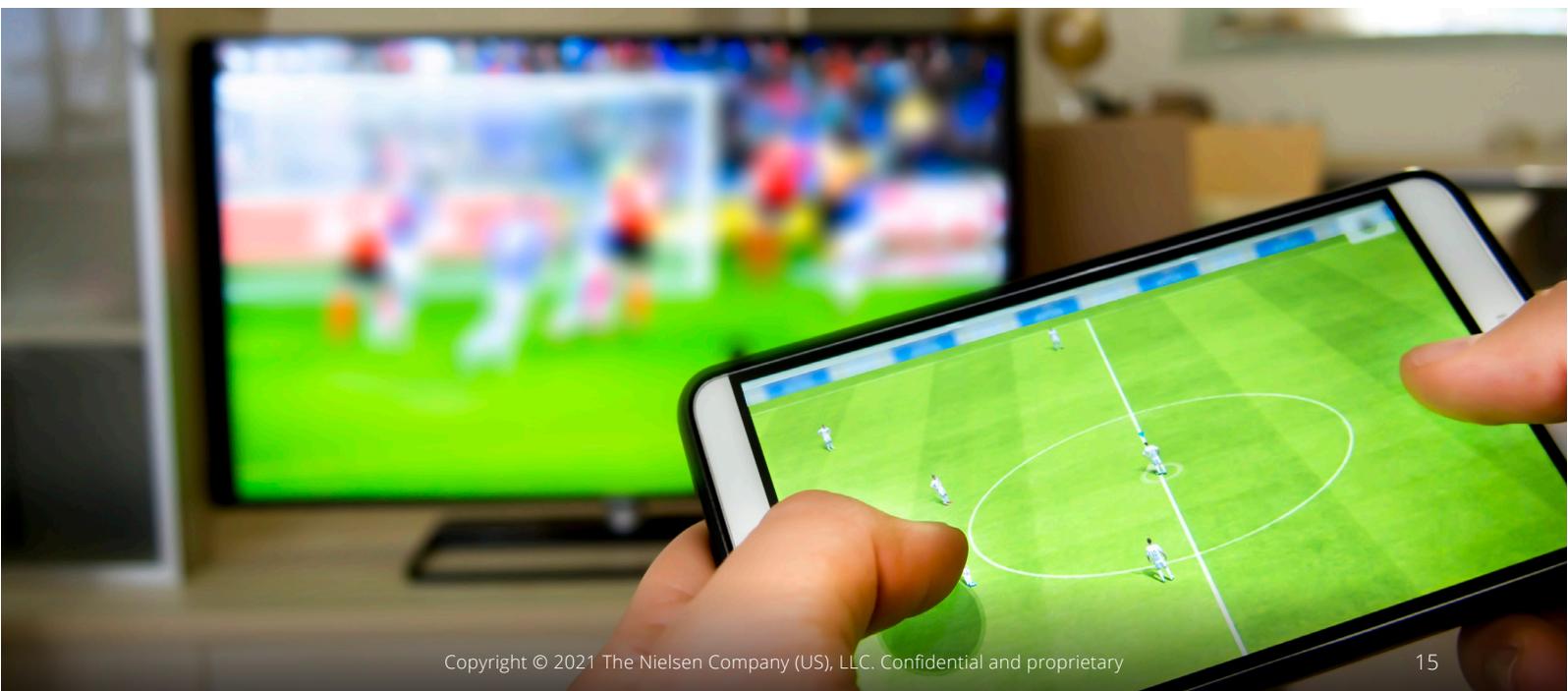
Despite the growth and strength of these digital platforms and an increasing trend to shift away from traditional media channels, we can still see from numbers on the following page that the top properties analyzed were able to deliver significant cumulative TV reach. This demonstrates the enduring strength of these properties and the fact that TV is still the dominant source of live content for many of the world's top sports and sports properties. TV similar to digital is continuing to innovate and strive to improve the consumer experience through new ways of getting closer to the action.

As noted earlier, this data is limited to metered channels, which so necessarily presents a partial view. Specifically:

- The global population is 7.9 billion people, of whom 4.3 billion are counted within the metered TV universe across 95 countries.
- We have selected 18 major markets that together account for 2.4 billion of the metered TV universe.
- Within this, 1.6 billion are Asian markets and China alone is 1.3 billion.
- The remaining 0.8 billion are non-Asia markets, including the core commercial sport markets of the USA and West Europe's 5 largest countries.
- All non-metered channels, which are very significant for some of the sports properties considered here, are excluded.

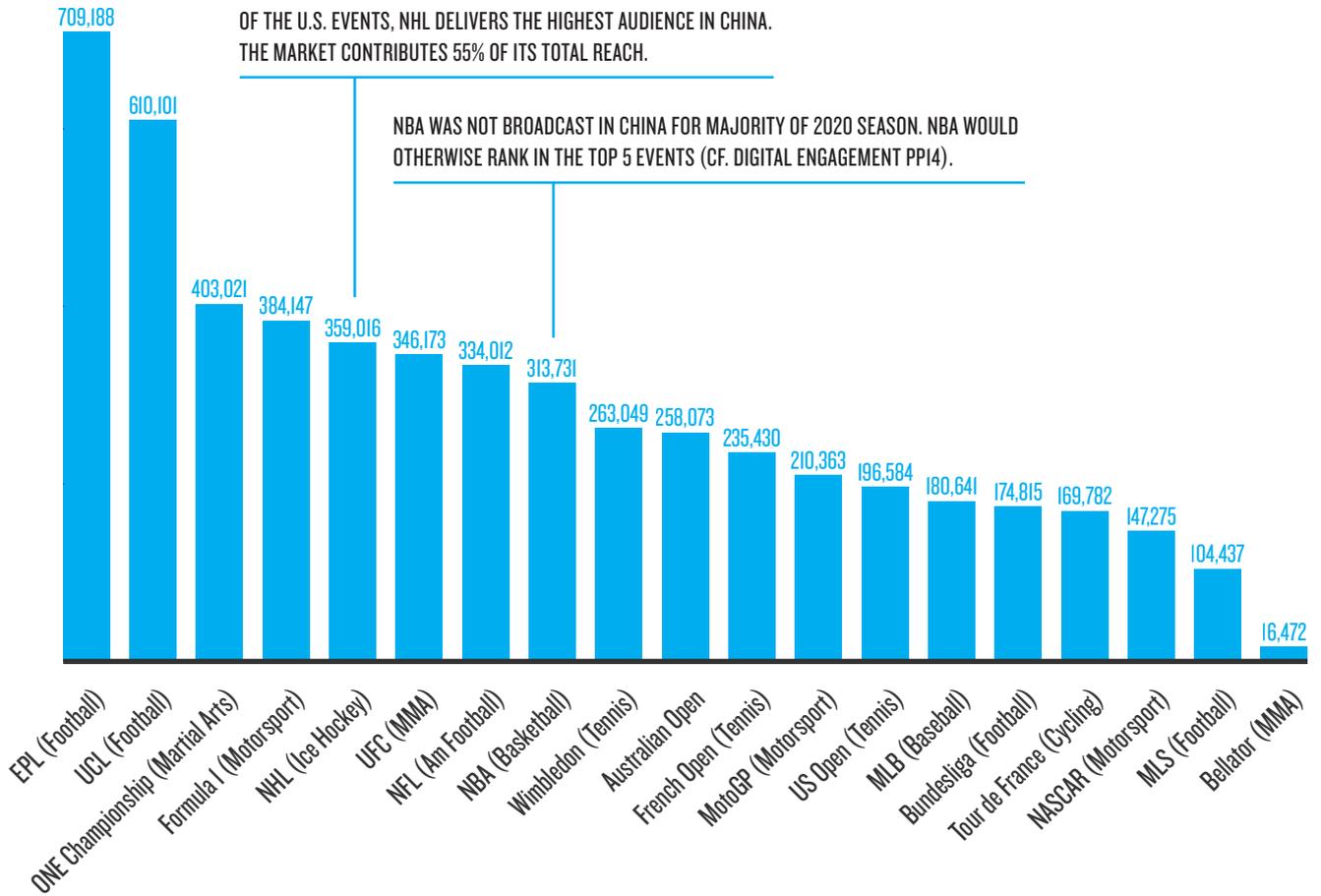
**“JUST BECAUSE WHAT WE DID LAST YEAR WAS GOOD ENOUGH DOESN'T MEAN IT WILL BE GOOD ENOUGH NEXT YEAR. WE NEED TO BE CONSTANTLY THINKING ABOUT MORE THAN JUST SHOWING THE GAMES, BEING MORE VISUALLY STIMULATING, MIC'ING UP PLAYERS, NEW ANGLES”**

**Vitto Lazatin** - Head of Content Acquisition Signal, Philippines



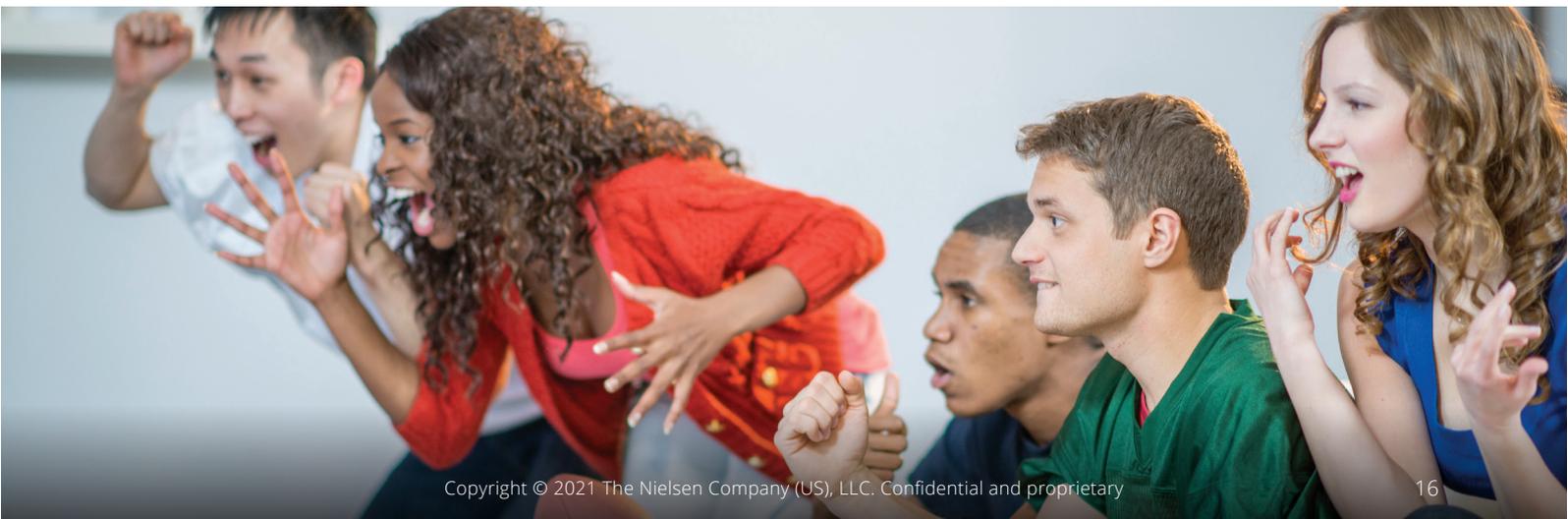
## CUMULATIVE REACH 000S

18 markets metered channels



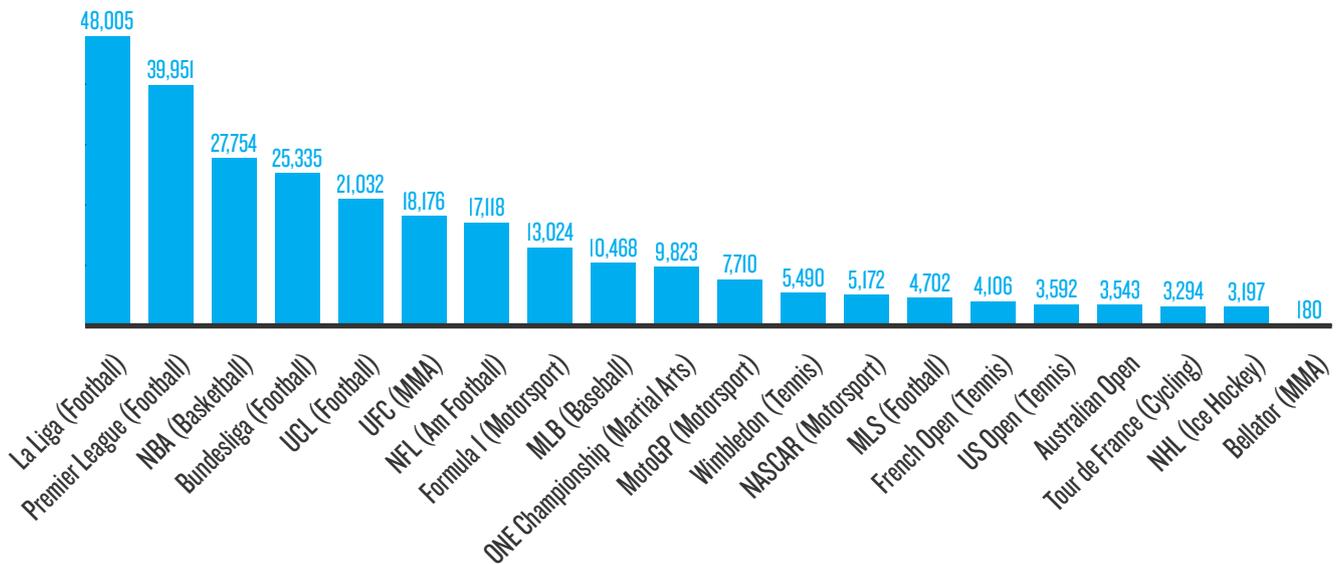
Source: Official local TAM (Television Audience Measurement), AGF/GfK Germany, Kantar Spain, Auditel/Nielsen Italy, Mediametrie France, BARB UK, Ibope Kantar Argentina (x2.93 multiplier to approach total population) Brazil (Cov% applied to Total Population 211m), Mexico (x2.31 multiplier to approach total population), CSM Media Research China, Video Research Japan, Nielsen Indonesia (x4.88 multiplier to approach total population), Malaysia (x1.49 multiplier to approach total population), Myanmar (x4 multiplier to approach total population), Philippines, South Africa, Thailand and USA, AMI Vietnam, Glance

Number of markets; EPL metered 14 Markets out of 18, UCL metered 14 Markets out of 18, One Championship metered 8 Markets out of 18, Formula 1 metered 15 Markets out of 18, NHL metered 6 Markets out of 18, UFC metered 12 Markets out of 18, NFL metered 14 Markets out of 18, NBA metered 12 Markets out of 18, Wimbledon metered 15 Markets out of 18, Australian Open metered 13 Markets out of 18, French Open metered 11 Markets out of 18, MotoGP metered 15 Markets out of 18, US Open metered 13 Markets out of 18, MLB metered 13 Markets out of 18, Bundesliga metered 14 Markets out of 18, Tour de France metered 14 Markets out of 18, NASCAR metered 11 Markets out of 18, MLS metered 12 Markets out of 18, Bellator metered 3 Markets out of 18



Similarly, we can also see this is reflected in the amount of content that these properties were able to put out. The broadcast hours shows that even during a pandemic year almost all properties were able to continue to put out a high level of content for their fans to consume. While many of the properties experienced major disruption, only one event, The Wimbledon Tennis Championships, was entirely cancelled in 2020.

## BROADCAST HOURS



Source: Official local TAM (Television Audience Measurement), AGF/GfK Germany, Kantar Spain, Auditel/Nielsen Italy, Mediametrie France, BARB UK, Ibope Kantar Argentina Brazil and Mexico, CSM Media Research China, Video Research Japan, Nielsen Indonesia, Malaysia, Myanmar, Philippines, South Africa, Thailand and USA, AMI Vietnam, Glance

Sports properties (and their broadcasters) continue to push to grow and engage their fan bases. Both TV and digital are providing complementary and also competing ways of doing this. However, as consumers continue to increase their demand for creativity, for access and for sheer volume of sports content, we can be sure that this will drive more and more innovation. The leading sports properties such as those cited within this report will likely remain at the forefront of delivering this evolution of sports content and fan engagement.

The background is a solid blue color with a complex, wavy, 3D effect. The waves are horizontal and flow across the frame, creating a sense of depth and movement. The lighting is soft, highlighting the ridges and shadows of the waves.

nielsen  
.....