

year in rewards the second of the second of

sports consumption evolution





Contents

Introduction	3
Methodology	4
TV broadcast methodology	6
Returning to "normal"	7
Video continues to grow	8
TV remains a major platform	16
A diverse approach is needed to navigate the evolving landscape	19
Summary and Learnings	21



Introduction

The sports industry continues to adapt to the new habits fans have developed over the last two years, with the pace of change accelerating substantially since the start of the pandemic in 2020. This is evidenced by the increasingly flexible and dynamic approaches to competition formats, fan engagement, and content distribution by the world's biggest sports properties.

No matter which sport or region, rights holders know they must:

- Meet fans where they are—consumers continue to have more platforms to engage with their favorite content
- Attract new fans whilst balancing engagement of existing fans
- Tailor content to meet the strengths of each platform and appeal to a variety of fan segments

"Rights holders know they have to build a relationship with their future fans today to remain relevant tomorrow"

Salvatore De Angelis - head of digital consulting, Nielsen Sports International

We see that TV remains a dominant player for many of the world's major sports properties, producing large cumulative audiences and significant broadcast time. However, the TV landscape is changing with the growth of OTT, whether that's from traditional major broadcaster-owned platforms or disruptors to the market. The use of social media for sports content continues to skyrocket and the emergence of TikTok shows the endless capacity for sports to innovatively engage with fans.

In this report, we examine 20 of the world's largest sports properties and the quadrennial events—Tokyo 2020 Summer Olympic Games and UEFA European Championship—to understand how these major rights holders reached their global fanbases in 2021.



Methodology

For this report we've chosen to focus on traditional sports entities and primary events. We identified 22 of the market leaders from the world of sports in 2021 (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 very important, and the subject of other Nielsen Sports reports, but for this report have not been considered.

For the 22 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 in 48 countries) identifies fan base sizing, demographics and media habits from fans around the world.



Digital impact

Worldwide metrics including total video views, follower sizing, engagement per post 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) deliver insights enabling Nielsen Sports to provide the context to understand the magnitude of the TV coverage these sports properties are able to achieve. It is important to note that annual local market forces and changes to broadcaster relationships can result in significant changes for any given market or property.



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 and 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, 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 Western Europe's five largest countries.
- All non-metered channels, which are significant for some sports properties in this report, are excluded.

Key aspects, such as whether the event is free-to-air (FTA), Pay TV or over-the-top (OTT) will impact the overall numbers. Also, not all channels are metered, which means some countries and sports audiences may not be fully captured. For the U.S., this report contains only national audiences; regional TV audiences are excluded, which can be significant for some sports.







Season/event data

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

Property	Season/event data	Number of markets with metered channel broadcast
Australian Open	Australian Open 2021	12 out of 18 markets
Bellator	Bellator 2020	4 out of 18 markets
Bundesliga	Bundesliga 2020/2021 season	14 out of 18 markets
F1	F1 2021 season	16 out of 18 markets
French Open	French Open 2021	14 out of 18 markets
LaLiga	LaLiga 2020/2021 season	12 out of 18 markets
MLB	MLB 2021 season	9 out of 18 markets
MLS	MLS 2021 season	10 out of 18 markets
MotoGP	MotoGP 2021	14 out of 18 markets
NASCAR	NASCAR 2021	10 out of 18 markets
NBA	NBA 2020/2021 season	9 out of 18 markets
NFL	NFL 2021 season	12 out of 18 markets
NHL	NHL 2021	8 out of 18 markets
ONE Championship	ONE Championship 2021	10 out of 18 markets
The Premier League	The Premier League 2020/2021 season	12 out of 18 markets
Tokyo 2020 Summer Olympic Games	Tokyo 2020 Summer Olympic Games (staged in 2021)	17 out of 18 markets
Tour de France	Tour de France 2021	11 out of 18 markets
UEFA Champions League	UEFA Champions League 2020/2021 season	13 out of 18 markets
UEFA European Championship	UEFA European Championship (staged in 2021)	14 out of 18 markets
UFC	UFC 2021	13 out of 18 markets
US Open Tennis Championships	U.S. Open Tennis Championships 2021	12 out of 18 markets
Wimbledon	Wimbledon 2021	15 out of 18 markets



Returning to "normal"

2021 will be seen as the year when many of the world's sports events were able to return to a scheduled approach that was similar to their pre-pandemic formats. Events such as Wimbledon (cancelled in 2020) or the French Open (moved to September 2020) were able to return to their usual slots in the sporting calendar. The Tokyo 2020 Summer Olympic Games and UEFA European Championship were able to take place a year later than originally planned. And other seasonal sports such as the NFL or European football leagues could start to maintain a consistent schedule and welcome some fans back to the stadiums.

However, despite this "return," the world has changed and new fan behaviors have been established. The last two years forced many rights holders to experiment with new methods to keep their fans engaged. Everything from archive footage, virtual sports, old event "watch alongs" and Q&As were all tested to help build a connection. The ways in which fans consume content has also changed—the fast emergence of new online streaming platforms, the placement of sports content across non-traditional sports broadcasters, D2C and social media's evolution have all expanded significantly.

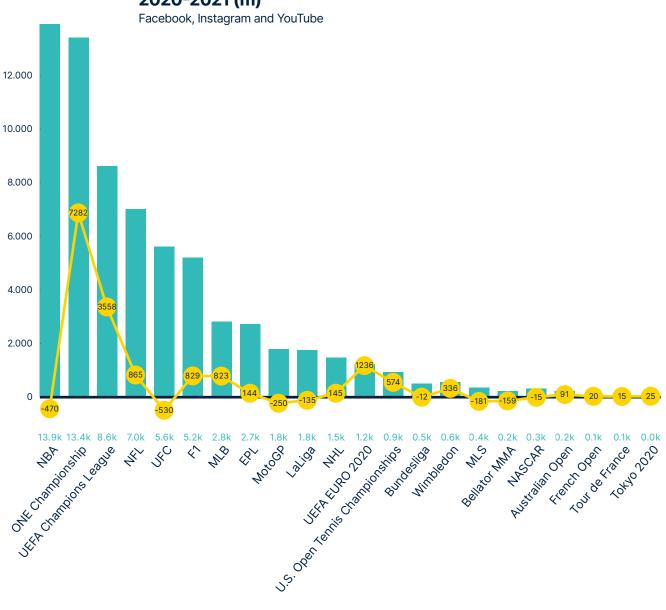




Video continues to grow

Growth of video consumption shows little sign of slowing down. The majority of the sports properties examined in this report significantly increased the number of video views from 2020 to 2021 across Facebook, Instagram and YouTube.

Total video views 2021 & actual growth 2020-2021 (m)



*Source: Nielsen Analysis (data sources: Social Blade, Fanpage Karma, Jan 2020 - Dec 2021)

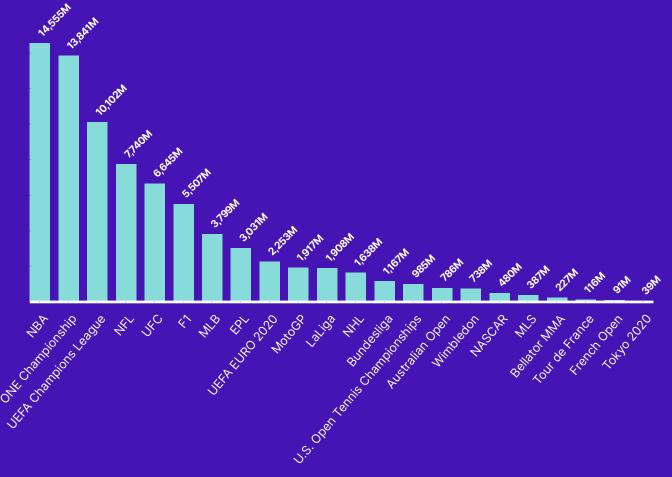
Actual growth 2020-2021

Total video views 2021 (Facebook, Instagram and YouTube)

When we factor in TikTok video views we see even more growth across nearly all sports properties. Seven of the rights holders doubled their number of views, including two out of the top three (ONE Championship and UEFA Champions League). Rights holders are matching content to both the platform and the audience. In the case of TikTok, it is providing the opportunity to connect with and engage a harder-to-reach younger audience.

Total video views 2021

Facebook, Instagram, YouTube and TikTok



*Source: Nielsen Analysis (data sources: Social Blade, Fanpage Karma, Jan 2021 - Dec 2021)



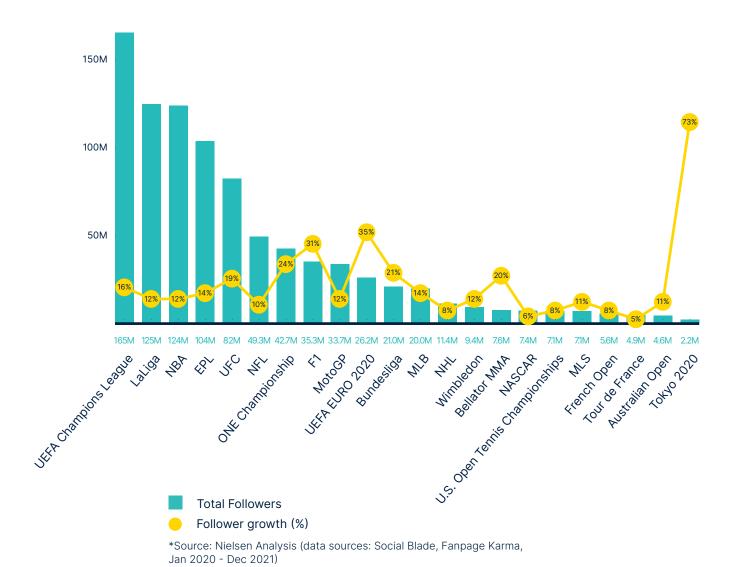
"F1 is taking a diverse approach. We are trying to appeal to a younger audience as well as a wider audience. For example, we are pushing our drivers 'up front' to give fans a chance to get to know them and build a connection".

Max Metral - senior analytics manager at F1

Growth has not been limited to video consumption, the total number of followers across social media platforms has also increased. The chart below shows followers by property along with their percent growth in 2021. Unsurprisingly, Tokyo 2020 Summer Olympic Games had the highest growth at 73%, as expected from a one-off event peaking in the summer of 2021. Similarly, the other major quadrennial multinational event, UEFA European Championship, was tied for the second-highest growth along with F1 across Facebook, Instagram and Youtube.

2021 followers & growth % 2020-2021

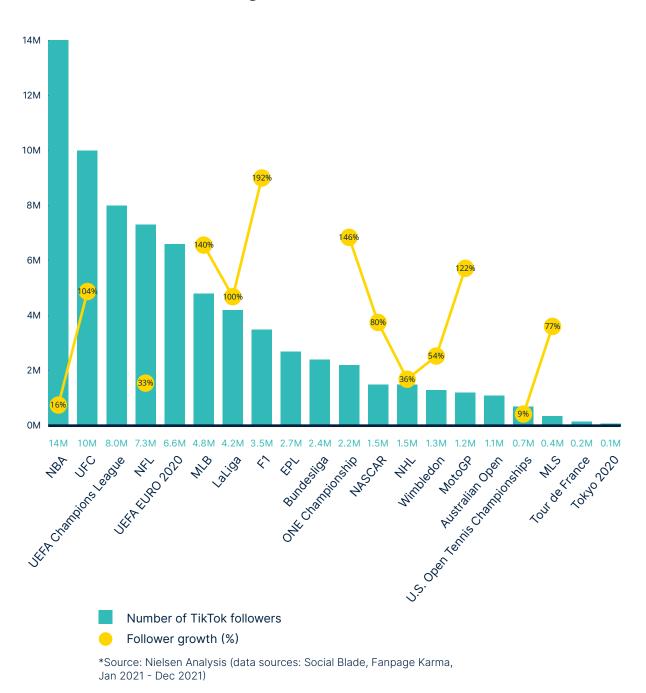
Facebook, Instagram and YouTube





The continued emergence of new social platforms and video platforms has also represented a chance for accelerated growth, none more so than TikTok. In 2021 six of the sports properties included in this report were able to achieve triple digit expansion in follower base. Many other sports properties saw high double-digit growth. New platforms create new content formats while attracting new fan segments.

TikTok followers & growth % in 2021



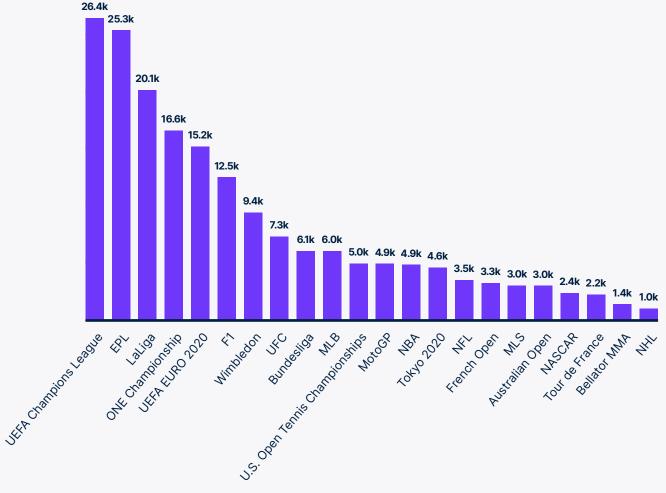


"TikTok offers rights holders the opportunity to create content that fits the consumption preferences of younger generations like Gen Z. Snackable content, funny videos, challenges, catchy tunes and collaborations with TikTok creators are formats with high engagement potential"

Salvatore De Angelis - head of digital consulting, Nielsen Sports International

Engagement rates vary by platform and property. Each sports property employs unique strategies to keep their audiences engaged, such as matching more technical content to platforms with higher levels of hardcore fans or providing more athlete stories on channels that reach casual fans. Matching content to the platform and meeting consumers where they are demonstrates the opportunity for rights holders to grow their fanbase and stay on top of the current trends.

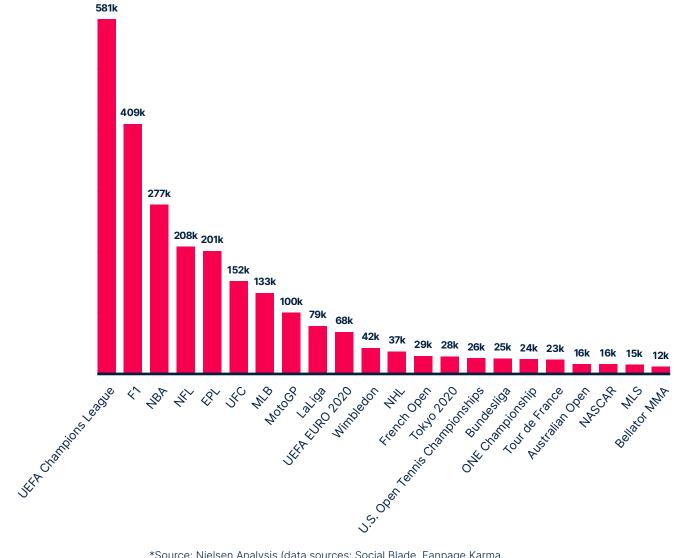
Average Facebook engagements per post 2021



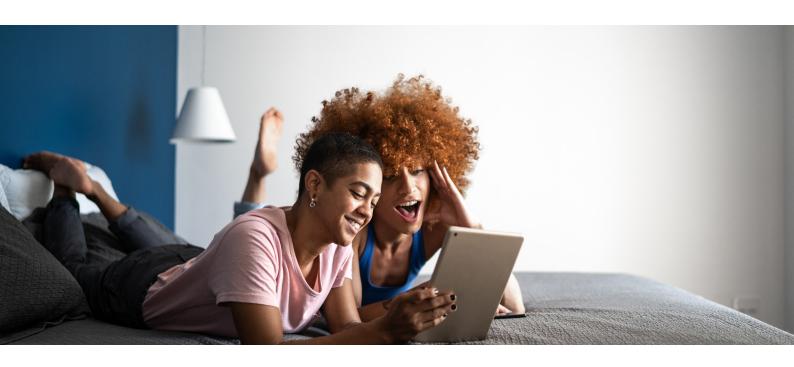
*Source: Nielsen Analysis (data sources: Social Blade, Fanpage Karma, Jan 2021 - Dec 2021)



Average Instagram engagements per post 2021

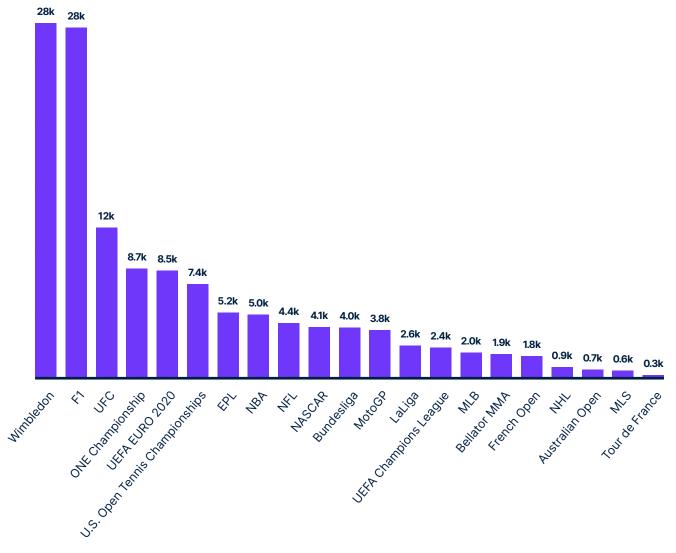


*Source: Nielsen Analysis (data sources: Social Blade, Fanpage Karma, Jan 2021 - Dec 2021)

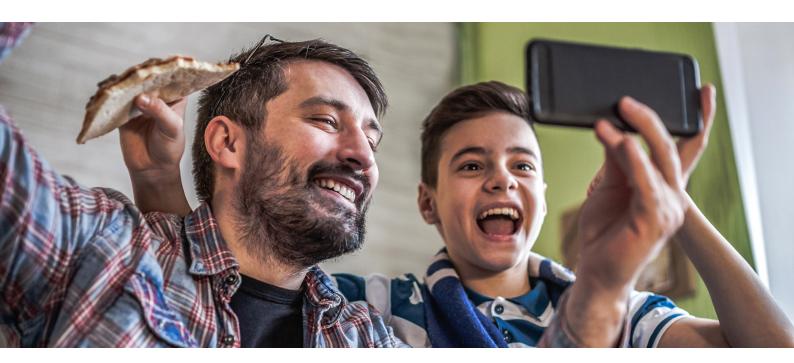




Average YouTube engagements per post 2021

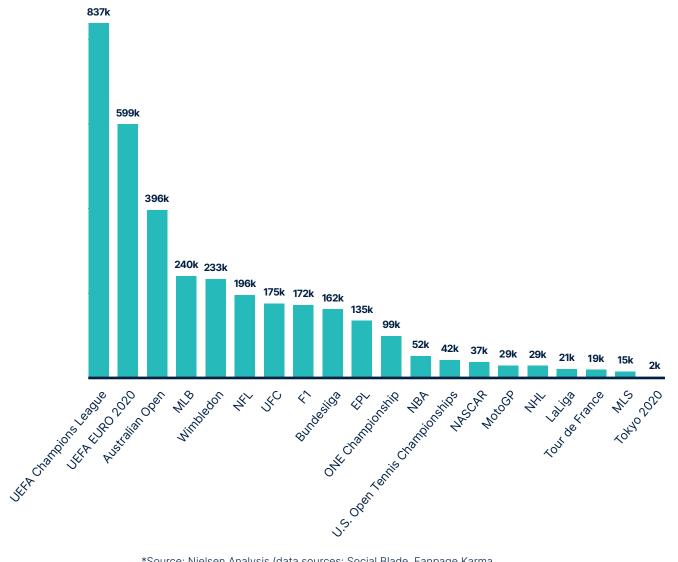


*Source: Nielsen Analysis (data sources: Social Blade, Fanpage Karma, Jan 2021 - Dec 2021)





Average TikTok engagements per post 2021



*Source: Nielsen Analysis (data sources: Social Blade, Fanpage Karma, Jan 2021 - Dec 2021)

"Our team was hyper-focused on optimizing content for every platform in 2021—serving up a blend of action and storytelling curated for each of their unique audiences...we dedicated more time to scrubbing through our video archives for unseen viral highlights, and doubled down cross-platform when we noticed a particular moment or content format taking off."

Hua Fung Teh - group president at ONE Championship



TV remains a major platform

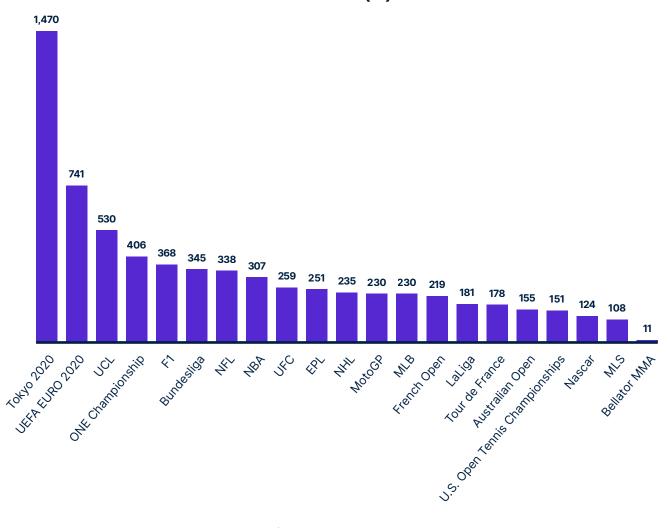
Whilst social media followers and video views continue to grow, the strength of TV as a primary source of content consumption still endures. As noted earlier, the data in this report is limited to metered channels and may not include comprehensive coverage of every sports property depending on their content distribution partners. 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, 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 Western Europe's five largest countries.
- All non-metered channels, which are significant for some sports properties in this report, are excluded.

When analyzing the TV cumulative audience data, it's clear the two mega events of 2021 achieved the largest global viewership. The Olympic Games was unsurprisingly the most watched, likely due to its availability across both linear and streaming in many countries (often subscription free) and the Games' global cultural and sporting relevance. Similarly, UEFA European Championship, a once-every-fouryears multinational event, ranked second on the list. Despite being a European-only event, it resonates as one of the most prestigious football tournaments in the world. We also see MMA organizations ONE Championship and UFC in the top 10 of sporting properties. Many sports properties continue to expand their global footprint by hosting games abroad or negotiating expanded media rights deals. ONE Championship has employed a similar strategy. With a traditionally strong fanbase in Asia, ONE Championship hosted live events at time slots compatible with prime time for U.S. audiences, thereby growing their audiences in that part of the world.



Global cumulative TV reach (m) in 2021

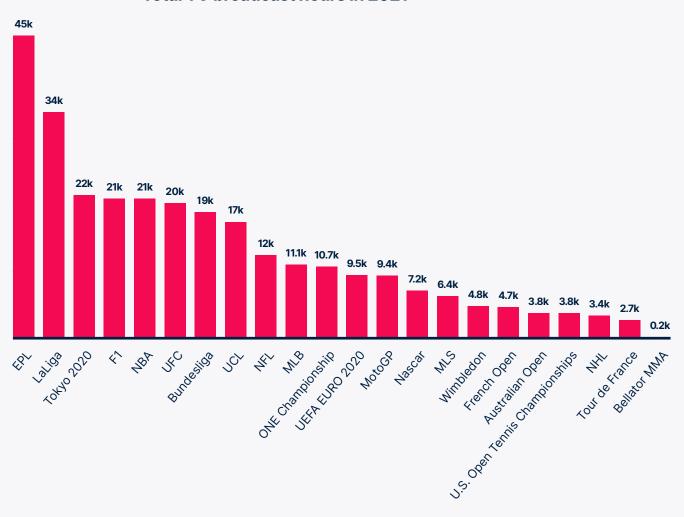


*Source: Official local TAM (Television Audience Measurement), AGF/GfK Germany, Kantar Spain, Auditel/Nielsen Italy, Mediametrie France, BARB UK, Ibope Kantar Argentina (x2.93 multiplier to approach total population) Brazil (Cov% applied to Total Population 211m), Mexico (x2.31 multiplier to approach 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
See TV broadcast methodology (page 6) for details of period covered



When examining total broadcast coverage, sports that have a traditional league format benefit from a higher number of total broadcast hours. While the English Premier League and La Liga are the top two sports properties in the chart below, the Tokyo Summer Olympic Games are a somewhat surprising third. Despite being only 17 days in duration, the sheer volume of sports played over such a short period of time and the high level of coverage boosts the Games into the top three.

Total TV broadcast hours in 2021



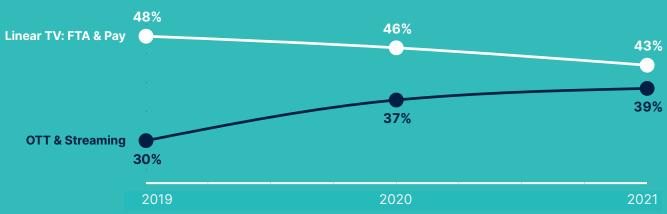
^{*}Source: Official local TAM (Television Audience Measurement), AGF/GfK Germany, Kantar Spain, Auditel/Nielsen Italy, Mediametrie France, BARB UK, Ibope Kantar Argentina, Brazil, Mexico, CSM Media Research China, Video Research Japan, Nielsen Indonesia, Malaysia, Myanmar, Philippines, South Africa,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

^{**}Total Broadcast Hours on Metered TV Channels

A diverse approach is needed to navigate the evolving landscape

The growth of social media platforms and the continued strong performance of TV broadcast indicates that a multi-faceted approach to reaching fans is required. Linear TV as a source of live sports viewership amongst the general public has declined over the past three years globally, whilst OTT and streaming platforms have continued to grow. This trend is likely reflective of both traditional broadcasters significantly improving their OTT and streaming offerings (such as NBC's Peacock in the U.S.) and also new entrants into the market, whether it be Amazon adding sports content or the emergence of services such as DAZN, a wholly dedicated OTT sports broadcaster. In addition, social media platforms are also streaming live sports through partnerships with major leagues and events around the world.

How fans watch live sports



*Source: Nielsen Fan Insights 2019-2021 (Brazil, China, France, Germany, India, Italy, Japan, Russia, South Korea, Spain, UK, U.S.) Q: How often do you watch sport on...? Note: Claimed behaviour

"We [F1] did a very successful live stream in Brazil with Twitch personality Gaules, this helped us reach a younger audience in a new way [that] we had not been able to do before"

Max Metral - senior analytics manager F1

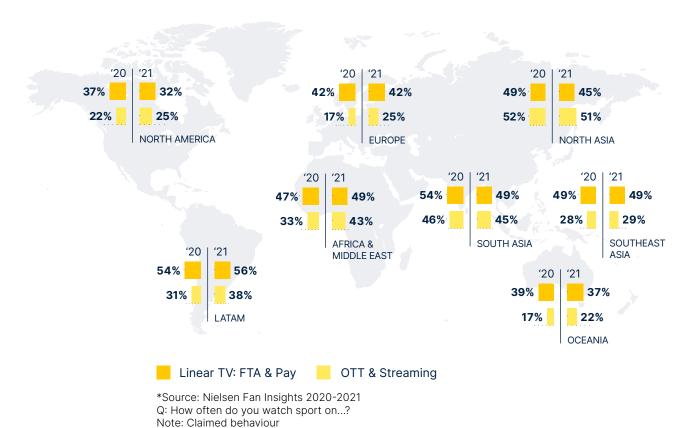


The broadcast experience has continued to evolve, with traditional sports adopting approaches often used for gaming and esports.

Many sports properties are signing supplementary rights deals with streaming services such as Twitch to help expand their reach. We also saw ESPN launch "The Manningcast" for their flagship Monday Night Football (MNF) program in 2021. Whilst ESPN was airing the traditional MNF broadcast, ESPN2 aired "The Manningcast." The two Manning brothers (Peyton and Eli, former NFL Quarterbacks) host the show from their homes and invite famous guests (NFL players, sportspeople and celebrities) to watch segments of the game with them whilst they discuss the action on the field and other culturally relevant topics. This broadcast was a significant departure from the traditional broadcast format and more in line with what viewers expect from an esports streamer.

Looking at regional shifts and variations, North Asia is the only region where OTT & streaming has already overtaken linear TV. This is primarily driven by China which has a well-developed streaming culture and a number of strong local players such as Tencent sports, Migu sports, iQIYI and CCTV video. Elsewhere, we generally see the macro global trend being played out on a regional level with slight changes in linear TV and faster growth from OTT and streaming.

How fans watch live sports by region - Gen Pop



Summary and learnings

- The world's largest sports properties returned to a more recognizable schedule whilst continuing to adopt more flexible and progressive approaches originally developed at the height of the pandemic.
- TV broadcast remains strong and continues to deliver high viewership but growth is largely driven by digital and social video consumption. It is paramount for sports organizations to develop a dynamic video strategy, thereby increasing the reach of their property.
- Global events are still a major draw, both Tokyo 2020 Summer
 Olympic Games and UEFA Euro Championship were two of the best
 performing sports across digital and TV metrics. These events
 maintain an important place in the sporting calendar alongside
 premium annual events.
- New digital platforms continue to close the viewership gap and at times eclipse traditional media. As new platforms, influencers and content creators continue to emerge, sports properties need to develop nimble strategies to capitalise on the potential fan base growth.

For more insights on changing fan behavior and their impact on sponsorship models and content consumption, check out our report "Fans are changing the game" and other content at https://nielsensports.com/



About Nielsen sports solutions

Nielsen Sports is the global leader in sponsorship analytics and fan intelligence. We provide brands and rights holders the knowledge to identify and connect with the audiences that matter most to them. Nielsen Sports supports commercial growth through expertise in fan behavior, media consumption and engagement habits.

We monitor 15,000 teams, leagues and events crossing over 150,000 brands while tracking over 170,000 sponsorship deals. Our data contextualizes the value of sports partnerships, helping brands and sports properties predict the future value of media assets and marketing investment ROI. We specialize in:

- Fan development
- Driving sponsorship revenue
- · Optimizing investment returns
- Media rights monetization
- Maximising event impact
- Market intelligence

Nielsen

