

Fans are changing the game



**2022 global sports
marketing report**

Introduction

Change is certainly nothing new, but its impact is seldom as sizable—or accelerated—as what the world has experienced over the past two years. For the sports industry, the return of fans at live events midway through 2021 was cheered by all, yet life has evolved too much during the pandemic for the sports industry to simply snap back to a mirror image of its pre-COVID self.

The world remains disrupted, and the scale of change has left its imprint on consumers for the long term. The persistence of the pandemic, combined with societal shifts in an increasingly digitized world, illuminate one constant that the sports industry needs to remain focused on to ensure sustainability and future growth: the consumer.

The tried and tested model of fandom has been challenged. As a result, fans have developed digital communities to drive connection with each other, their favorite athletes and their favorite teams. Fandom has shifted from large audiences physically together to more remote yet more engaged behavior. While ticket sales dipped, fans found new ways to build community: chatting, sharing, betting and co-watching.

This report examines the global consumer shifts over the last two years and their impact on sports sponsorship models and content distribution.





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SECTION 1

Behavior shifts and new experiences are broadening fan engagement



There is no denying the impact that digital connectivity is having on the way consumers engage with video content. In the U.S., for example, consumers spent **32% of their TV time** using TV-connected devices in September 2021, up from just 8% a decade earlier. And as connected devices gain momentum as the great amplifier of content, access to content continues to expand, with 40.7% of global fans¹ now opting to stream live sports events through digital platforms.

The expansion of OTT

For rights holders and brands alike, the proliferation of non-traditional media channels has forever changed the sports viewing landscape. The continued adoption of over-the-top (OTT) options among consumers has fueled a dramatic rise in the number of platforms for sports content. With TV-connected device usage growing globally, independent sports rights holders like DAZN are attracting significant increases in viewership—and media value—but largely outside of the U.S.

According to research from Nielsen Sports, OTT media rights value have grown²:

▶ From 4% to 23% at the local level for the top five European football leagues for rights deals negotiated in the last two years.

▶ From 5% in 2018 to 23% in 2021 for the UEFA Champions League in the top five European markets.



▶ From 0% between 2014 and 2018 to 31% between 2019 and 2023 (forecasted) for the ATP 1000 world tennis tour.



▶ From 0% between 2016 and 2018 to 30% between 2019 and 2022 (forecasted) for the Copa Libertadores in South America.

¹ Nielsen Fan Insights, August 2021, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Nigeria, Russia, South Korea, Spain, Thailand, U.K. and U.S.

² Nielsen Sports Analysis. Data calculated on the aggregated date of media rights value by TV deal cycle.

The rise of non-live content

The proliferation of content across platforms has also sparked increased consumption of additional sports content—both related to and not related to live matches. This presents an array of opportunity for both rights holders and brands alike, and it illuminates the growing importance of sports-related content, especially among younger generations. For example, just under 44% of fans 16-29 who watch non-live sports content that's related to live matches do so via digital, which is just 0.4% less than those who watch live matches via digital.

The growing appeal of related sports content

Will watch	Global fans		Global fans 16-29	
Non-live content that's related to a live sports event	39.39%	-1.31% vs. live sports event	43.59%	-0.41% vs. live sports event
Non-live content that's not related to a live sports event	34.24%	-6.46% vs. live sports event	39.77%	-4.23% vs. live sports event

Source: Nielsen Fan Insights, August 2021; Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Nigeria, Russia, South Korea, Spain, Thailand, U.K. and U.S.

Importantly, the demand for content related to a live event (match announcements, highlights, recap videos, etc.) is almost as high as it is for digitally delivered events themselves. And content unrelated to a live event (docuseries, behind the scenes, virtual events, etc.) is just slightly less sought after than live digital event content. Aside from attracting fans of specific leagues and teams, the non-live sports content has the power to attract new audiences to sports as well, especially when the content lives outside of the channels that are most commonly associated with sports matches (e.g., free-to-air and paid TV). This is particularly relevant for Gen Z.

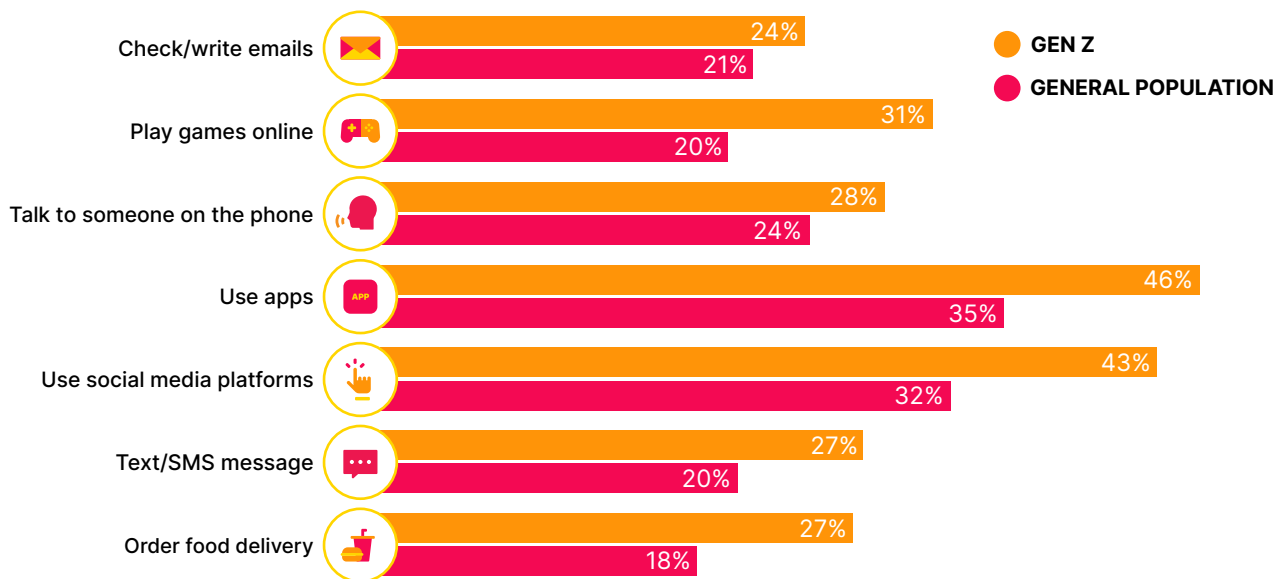


When one screen isn't enough

Across audiences, the general population has increased its multi-screen viewing activities (social media, texting, playing games, ordering food) by an average of 5% over the last year, with this percentage doubling to 10% among Gen Z³. In total, 47% of the people who watch sports on TV or digital platforms simultaneously watch other live content, much higher than the general population (33%).

Activities while watching sports

Regularly (%)



Source: Nielsen Fan Insights, August 2021



While much of the second-screen activity relates to social media engagement, especially as consumers seek new ways to be together, ordering food and online gaming have picked up steam throughout the pandemic, with Gen Z driving the greatest penetrations at 26.5% and 31%, respectively³.

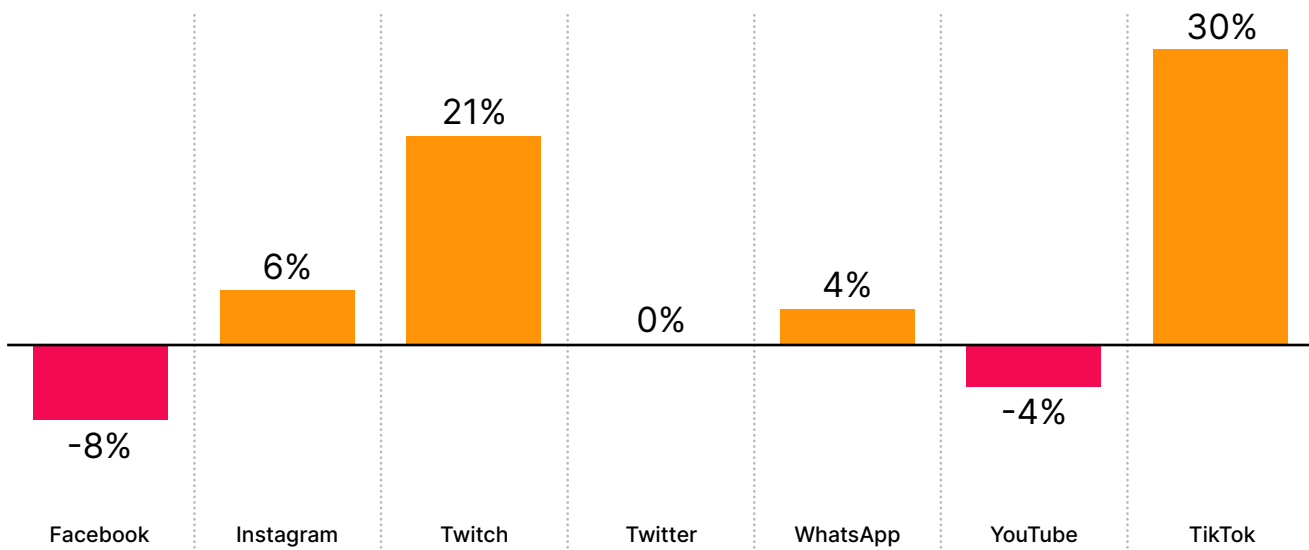
³ Nielsen Fan Insights August 2020 vs August 2021 for Brazil, China, France, Germany, Italy, Japan, Russia, South Korea, Spain, U.K. and U.S.

Video-based social media complements the live experience

Engagement with video-based social media channels has also grown as fans are eager to play a role in content creation. TikTok and Twitch are gaining on the traditional platforms (YouTube, Facebook and Instagram), posting respective usage gains of 30% and 21% between April 2020 and August 2021.⁴ The increases continue to position these platforms as progressively strengthening outlets for both user-generated content and multi-screen interaction.

Change in social media usage for sports news and content

April 2020 - August 2021



Source: Nielsen Fan Insights, April 2020 - August 2021; Brazil, France, Germany, India, Italy, Japan, Russia, South Korea, Spain, U.K. and U.S.



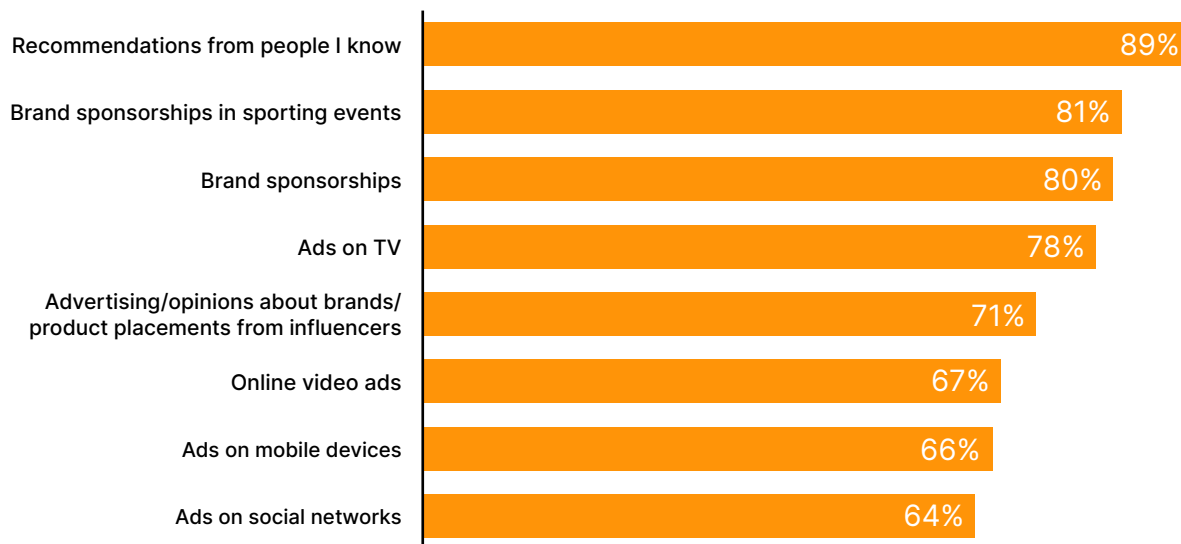
⁴ Nielsen Fan Insights August 2021 vs April 2020 for Brazil, France, Germany, India, Italy, Japan, Russia, South Korea, Spain, U.K. and U.S.

Influencers are driving personal connections

Consumers view athletes as meaningful and personalized connections. Nielsen's recent [Trust in Advertising study](#) found that people trust recommendations from people they know more than any other influence factor, with influencers not too far behind. Globally, 71% of consumers either completely or somewhat trust ads and opinions from influencers about brands and products, which is notably higher than channels like online banners, mobile ads, search engine ads and SMS messages.

Most trusted advertising channels

Percent trust



Note: Percentages represent aggregate totals for responses to 'completely trust' or 'somewhat trust' across select marketing channels.

Fans want action—and progress—from brands

From a messaging perspective, fans are looking to sponsors that champion societal issues they believe in, much like the expectations consumers have of brands across industries. Yet despite the increased focus on societal issues around the world, only 9% of people strongly agree that the measures big brands are taking around pertinent issues are improving the connection between brands and fans⁵.

Importantly, purpose-driven campaigns offer brands more than lifts in fan sentiment. Across 15 marketing mix modeling studies between 2017 and 2020 in France, for example, 30% of the purpose-driven campaigns increased short-term sales by 50%. Longer term, the purpose-driven campaigns improve sales between 1.2x and 3x.

People want to see more than words:

55% are not convinced the measures brands are taking are contributing to real progress⁵.

⁵ Nielsen Fan Insights, July 2021; Australia, Brazil, China, France, Germany, India, Japan, Russia, South Korea, Spain, U.K., U.S.

SECTION 2

Changes in fan behavior

are affecting sponsorship
models



**81% completely
or somewhat trust
brand sponsorships
at sporting events**

Consumer trends have altered how fans interact with each other and with sports properties. These shifts along with the disruption of 2020 have escalated changes in brand partnerships. One thing that hasn't changed is the universal breadth and appeal of sports. Sponsorship expenditures in early 2021 were up 107% versus the same period in early 2020, and advertising budgets continued building throughout the year. In addition to the significant exposure they

present, brand sponsorships are very well regarded by consumers. According to Nielsen's 2021 Trust in Advertising Study, 81% of global respondents either completely or somewhat trust brand sponsorships at sporting events.

Combine the high level of trust with the strong correlation between visible sponsorship messaging and purchase behavior, and brands have plenty of upside to gain. In a recent analysis of 100 sponsorships between 2020 and 2021 in seven markets across 20 industries, Nielsen found that the sponsorships drove an average 10% lift in purchase intent among the exposed fanbase.

The transition from building awareness to conversion speaks to the growing importance of sponsorships throughout the full marketing funnel, and this trend will continue. Nielsen's experience base shows that on average, a **1-point gain in brand metrics** such as awareness and consideration drives a 1% increase in sales. Upper-funnel efforts also generate an array of ancillary benefits that can drive the efficiency of sales activations.

In the sports industry, sponsorship activations have grown in their ability to convert fans; across 13 industries measured by Nielsen during the pandemic, when we control for the impact of changing levels of brand awareness and sponsorship maturity, we actually see—among fans exposed to the sponsorship—an increase in purchase intent even higher than in brand familiarity. Nielsen expects the pace of such a trend to decelerate with brands now returning to a more balanced marketing effort in many industries; nevertheless, sponsors and rights holders have structurally improved their ability to generate call-to-action from fans.



**Sponsorship can drive a
10% lift in
purchase intent**



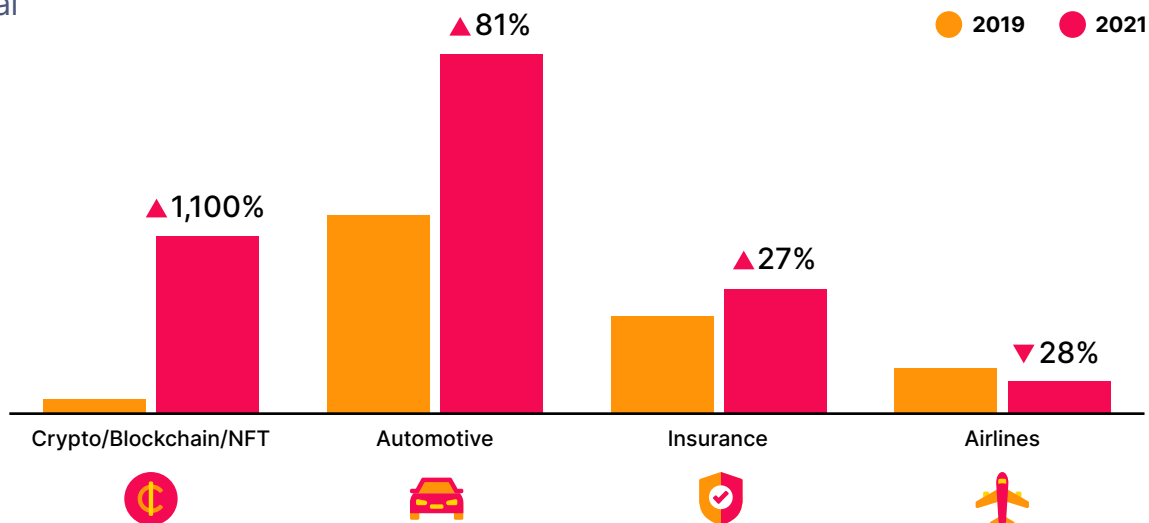
The crypto connection

Just as it has in other industries, the burgeoning world of crypto currencies has started to revolutionize the sports industry—both in terms of fan engagement and revenue potential.

As a sponsorship category, crypto has quickly catapulted into the limelight, growing exponentially faster than traditional categories. Given the widespread exposure that sports provide, the opportunities for crypto-related sponsorships are blossoming, and the number of inked deals dramatically increased between 2019 and 2021.

New sports sponsorship deals by brand category

Global



Source: Nielsen Sports Sponsorglobe

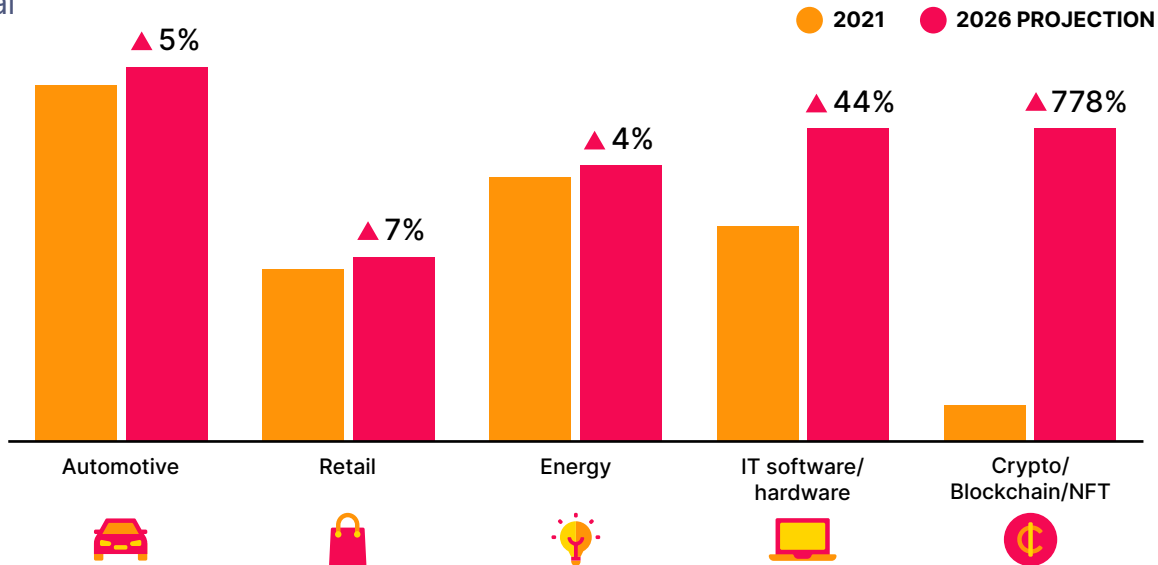
From a fan-first perspective, crypto fan tokens have been a part of European soccer after Paris Saint-Germain and Juventus F.C. listed fan tokens on three separate crypto exchanges in late December 2020. Today, more than 35 soccer clubs have followed suit, offering token owners the opportunity to vote on a range of matters concerning their favorite clubs, such as match locations, bus design—even team uniform design.

In the U.S., fan tokens have yet to materialize, but an array of professional sports leagues and teams have established partnerships and sponsorship deals with a variety of crypto companies. Fan engagement platform Socios.com established relationships with 24 NBA franchises at the start of fall 2021. While they don't involve actual tokens, those relationships allow fans to chat, post and view content from other fans and attend sponsored virtual events. The relationship with the NBA also presents Socios.com with significant exposure across social media and broadcast programming.

Crypto investment in sponsorship soars

Projected sports sponsorship investment growth by brand category

Global



Source: Nielsen Sports Sponsorglobe

Blockchain companies investing in sports sponsorship is projected to reach \$5 billion USD by 2026. From a success perspective, the future of crypto sponsorships will depend on two key factors: legitimacy and fan engagement. 2021 was a big year for crypto sponsorships, highlighted by the \$700 million USD naming rights deal that transformed the Staples Center into Crypto.com Arena in late December 2021. Long term, it will be vital for organizations to properly vet sponsors and not let revenue impede due diligence.

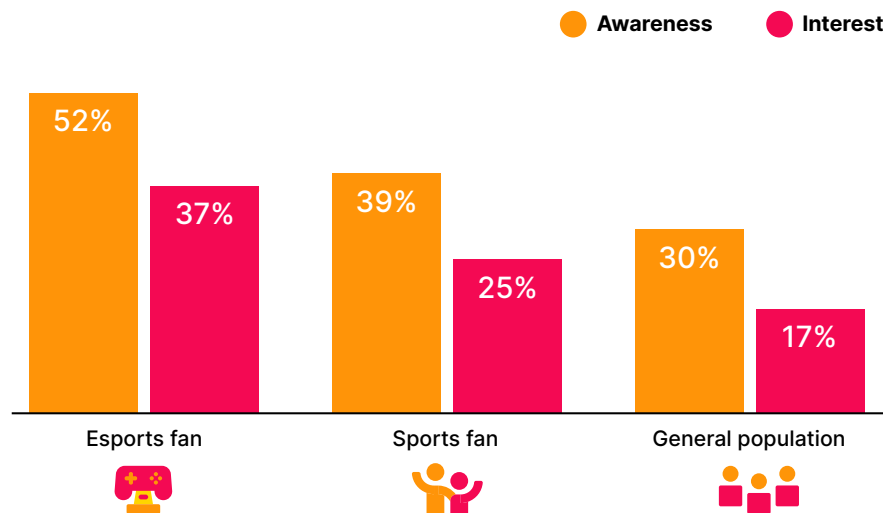
For brands looking to sports for sponsorship opportunities as a way to engage with new audiences, long-term success will hinge on bridging the gap between awareness and conversion. This is particularly relevant for brands in the crypto space, largely because it's a new and unfamiliar industry that much of the general public has yet to formally enter into—even if overall awareness is rising.



Esports and sports fans are leading the crypto conversion

The exposure that big brand crypto efforts have across leagues and teams is also boosting awareness—and interest—among fans. Notably, 52% of esports fans and 39% of sports fans say they are aware of crypto tokens, significantly higher than the general population. Not far behind, 24% of sports fans also express an interest in NFTs (nonfungible tokens)⁶.

Awareness and interest in crypto tokens is growing



Source: Nielsen Fan Insights, August 2021, 12 countries



⁶ Nielsen Fan Insights, August 2021, 12 countries

Athletes as influencers

The high level of trust among consumers supports the 10% growth in brand-funded influencer posts and ads over the past year⁷. Additionally, 75% of the marketers surveyed for the [2021 Nielsen Annual Marketing Report](#) said they planned to increase their paid social media over the next year. From a fan perspective, athletes have a higher potential of being able to establish human connections with fans than leagues, teams and venues. In fact, 26% of avid sports fans⁸ who look to social media for sports news say that athletes are a great way to connect with brands and sponsors.

Brand partnership appeal

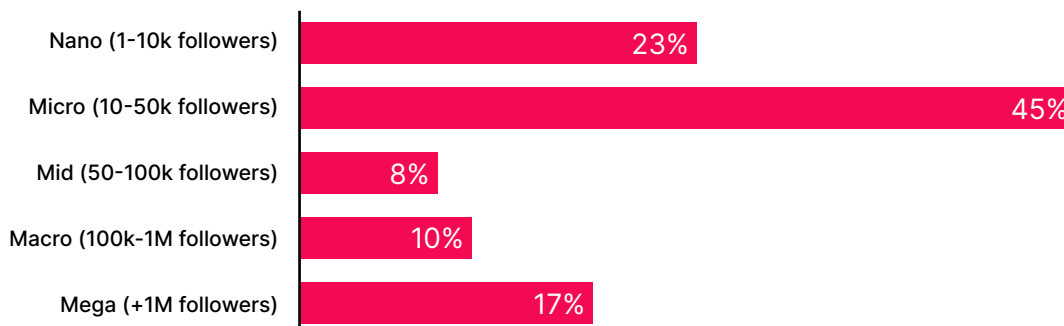
Percentage of fans who believe the following options are a great way for brands/sponsors to connect with me personally



Source: Nielsen Fan Insights, July 2021; Australia, Brazil, China, France, Germany, India, Italy, Japan, Russia, South Korea, Spain, U.K., U.S.

The increased trust in athletes aligns with the growth seen by micro and nano influencers. Brands are shifting their strategies away from “bigger is better” and instead focusing on influencers with fewer followers that make more personal connections with followers and thus have a greater impact on driving behaviors such as trying a new product.

Annual compound growth rate of sponsored posts by influencer category



Source: Nielsen Sports Social Analysis

⁷ Nielsen InfluenceScope

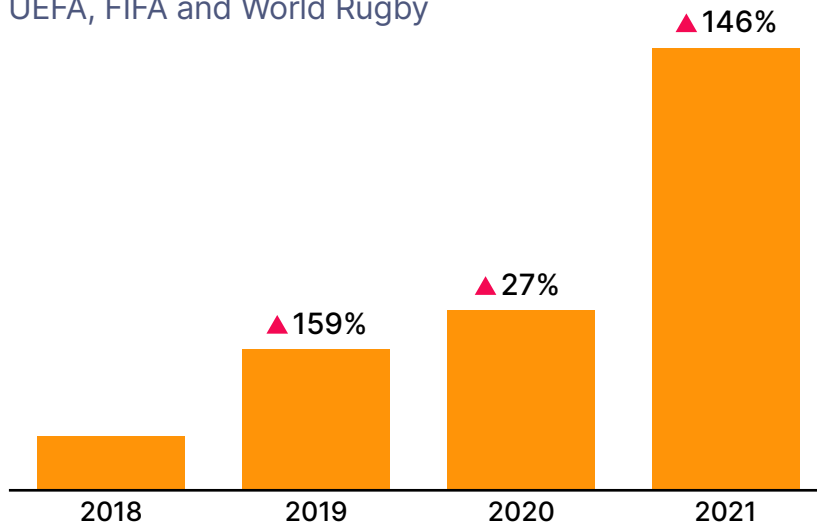
⁸ Nielsen Fan Insights, July 2021, nine countries

Unbundling sponsorship of women's sports leads to growth

Rising interest in women's sports is shifting how global sports properties and federations approach sponsorship. Historically bundled with men's sponsorship opportunities, often as an afterthought, properties are increasingly unbundling them amid rising interest and investment in women's sports overall.

Unbundled sponsorship investment in women's sports

UEFA, FIFA and World Rugby



Source: Nielsen Sports Sponsorglobe



Importantly, this change in sponsorship model is not resulting in sponsors choosing one or the other. Rather, the unbundling is giving sponsors new, varied opportunities to involve themselves across the broader sports landscape. With more women's sports being televised and increased sponsorship opportunities specific to women's sports, many brands are effectively reaching consumers they weren't reaching through sponsorships in men's sport.

The upside for brands is that as unbundled, independent opportunities, sponsors are more able to measure the impact of their efforts and quantify their value. And because unbundling has not cannibalized existing opportunities, the uptick in sponsorships for women's sports is adding to the aggregate brand investment across the sports industry.

Esports sponsorship is not slowing down

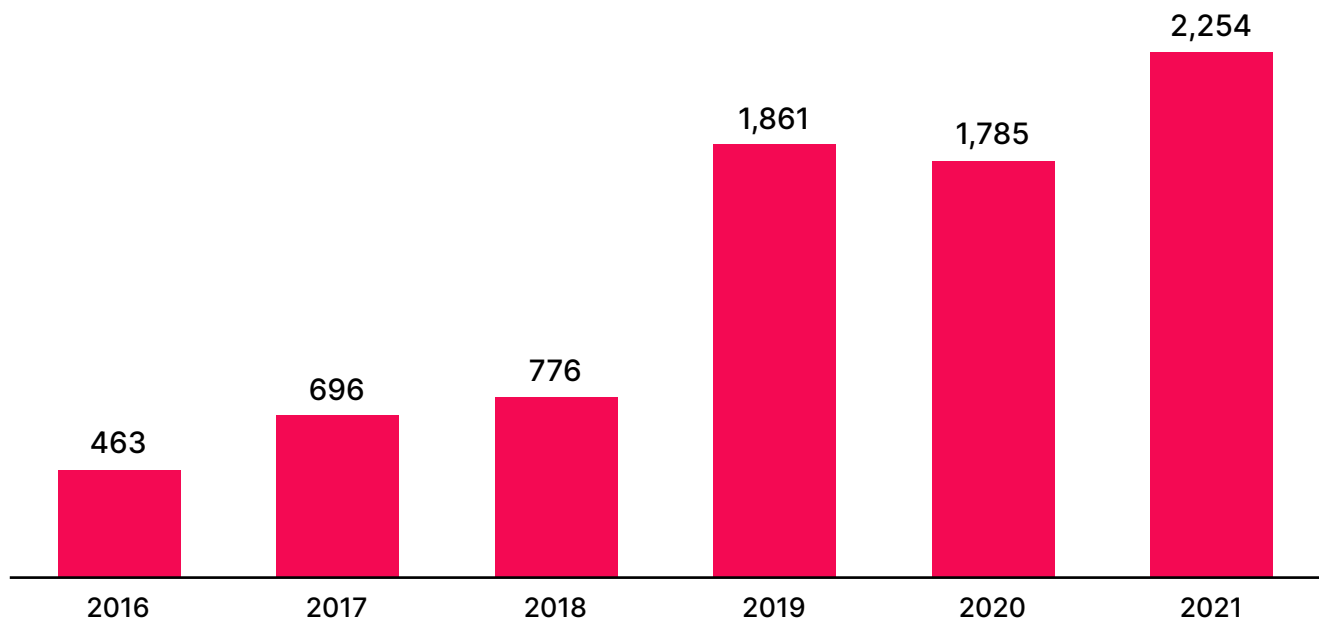
Esports mergers were headline news in early 2022, marking its importance as one of the fastest growing segments of the global entertainment industry. Esports is another avenue where brands are reaping the benefits of aligning their spend with opportunities to engage new fanbases. The growth of mobile gaming has only spurred esports fandom, increasing reach and diversifying fan segments. Sixty-nine percent of people play video games weekly on a smartphone or tablet, according to a Nielsen Sports Global Gaming Analysis last year.

This uptick coincides with Nielsen Esports Fan Insights data showing that 50% of esports fans globally started following in the last two years, and they aren't all teenage boys. In the last year, the female fan base grew by 19%, while male fan base grew by 12%. Additionally, both the 18-25 age range and the 35-40 age range grew by the same 14%. This diversification of gaming and esports fandom provides brands the opportunity to test new engagement approaches.

Mastercard, for example, is a brand that some might not associate with esports, yet it decided to get involved a few years ago. [According to Michael Goldstein](#), head of sponsorships, North America, at Mastercard, the involvement helps the brand reach an audience that is different from its traditional clientele. While he says the brand's involvement offers significant visibility, integration in LCS, for example, allows players to keep their card on file for in-game e-commerce use. Integrations aside, however, Goldstein says ROI is paramount.

Esports sponsorship deals are growing rapidly

Publicly announced deals



Source: Nielsen Sports Sponsorglobe

SECTION 3

Shifts in media consumption

are a balancing act of
old and new

In many ways, the wide adoption and usage of OTT options among consumers is allowing rights holders to revise their business strategies. Instead of looking at sports programming as a mass reach opportunity, sports media rights are being acquired with different business objectives in mind. Amazon, for example, is trading the mass reach of traditional telecast availability for the ability to connect content with consumer spending, effectively altering the value proposition of its viewers. When Amazon first aired the English Premier League domestically in the U.K. in 2019, Amazon reported the highest number of Prime membership sign-ups in any two-day period in the U.K. Amazon has similar hopes for the 2022 NFL season, when it assumes the exclusive broadcast rights for Thursday Night Football.

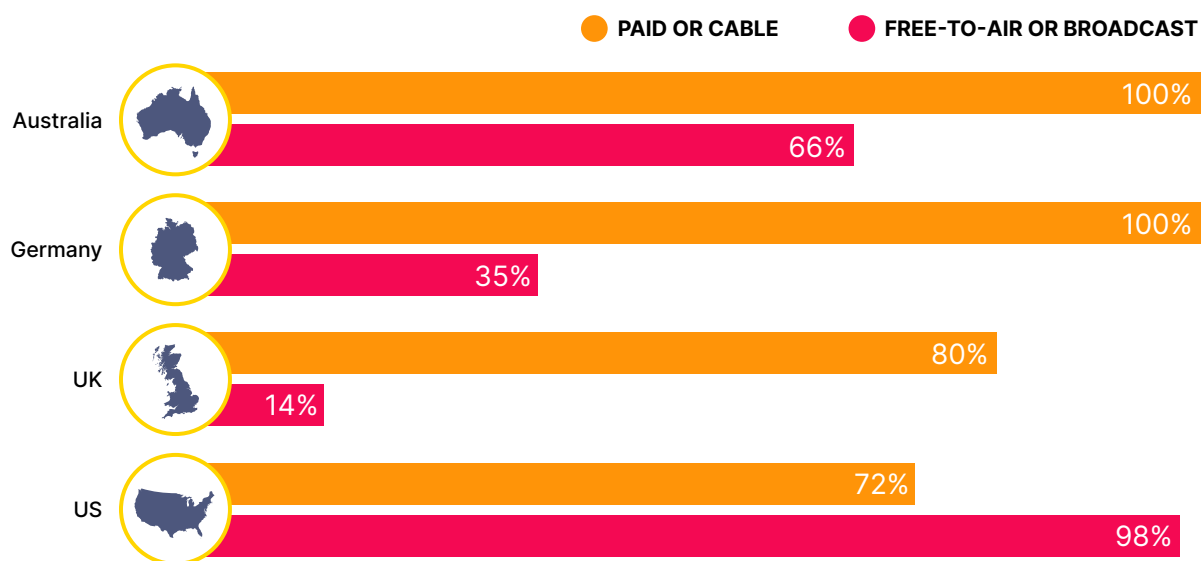
Traditional linear TV is holding on to sports

While live sports on OTT platforms are expanding globally, linear TV in the U.S. is struggling to retain customers, with subscriptions down 18% since 2019. Live sports remains a key driver of engagement with linear TV programming. Most live sports content in the U.S. remains available across traditional broadcast and cable TV channels, which in turn, attracts significant investments from sponsors and advertisers.

In October 2021, for example, sports content drove a 22% month-over-month increase in U.S. broadcast TV viewing even though sports programming represented only 2.7% of the available broadcast program content⁹. The power of sports on linear TV isn't unique to the U.S. While the average age of linear TV viewers continues to rise globally, sports fans skew younger, which is represented in their TV viewership.

Sports is must-watch TV

Percentage of top 50 most-viewed programs (Jan – Sept 2021)

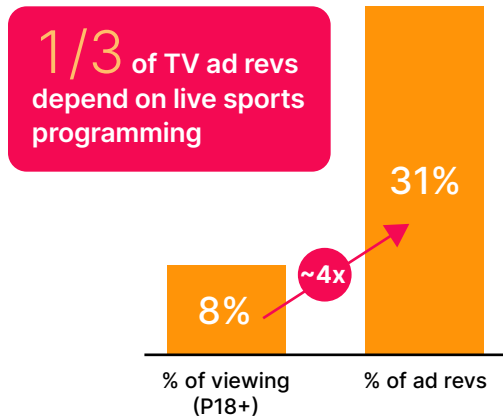


Source: OzTAM, Australia, AGF / GfK Fernsehforschung [Germany], BARB, Nielsen Ratings P2+ AA

⁹ October 2021 The Gauge, Nielsen's total TV and streaming snapshot.

Irreplaceable revenue driver

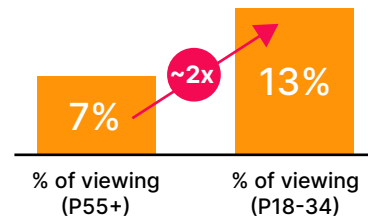
Ad revs punch 4x above time spent in the U.S.



Source: Nielsen TV Data Q2'20-Q2'21, Nielsen AdIntel Q2'20-Q2'21, U.S.

Younger viewer skew

Sports accounts for nearly double share of TV viewing P18-34 vs. P55+ in the U.S.



Ways to enhance the live viewing experience

The importance of live sports to linear channels notwithstanding, the array of media options available to fans raises the bar for any platform seeking long-term consumer engagement. Given that many fans engage with other devices while they watch sports, rights holders, content providers—even equipment manufacturers—should explore ways to integrate data, statistics and sports betting into matches and games to create a more complete viewing experience for fans.

From a fan perspective, short-form news, recap, highlights and Q&A content are highly sought out by Gen Z consumers. From a growth perspective, long-form original series and interactive event content around gaming, contests and raffles will be critical in attracting younger consumers who are not yet engaged. Engaging this group with the right content has the potential to grow the global Gen Z fan base from 25.2% to 27% in the next 18 months¹¹.

51% of people interested in watching sports are checking live stats while watching a sporting event¹⁰.

MLS fans are 33% more likely to watch live matches if they are sports bettors vs. non-bettors, followed by 10% for the NHL and 5% for the NFL¹⁰.



¹⁰ Nielsen Fan Insights: June 2021; 12 markets

¹¹ Nielsen Fan Insights, Nielsen Ratings Jan 1, 2021 - June 30, 2021

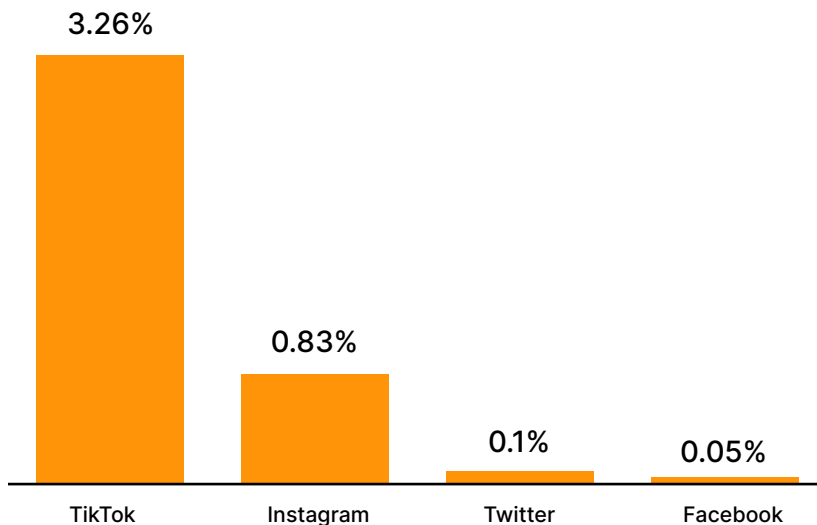
Fan content creation is driving content consumption

Increasing connectivity and growth in digital platforms is creating an equally dramatic rise in fan-generated content, elevating the usage of social media platforms like TikTok and Twitch from platforms for sharing content to platforms for content creation. Social platforms are also providing new opportunities for rights holders looking to reach new audiences, as many are investing in a range of exclusive and non-exclusive content for various social platforms. In early 2021, for example, Ultimate Fighting Championship (UFC) inked a multi-year agreement with TikTok whereby the platform will feature live-streams of UFC content, such as interactions with the athletes and behind-the-scenes footage.

While the viral popularity of certain platforms has elevated their prominence among users, TikTok has been at the forefront of boosting its own visibility, especially in the sports industry. When the UEFA Euro 2020 was postponed to summer 2021, TikTok joined as a sponsor just four months before the championship began. With an array of activations developed with UEFA during the tournament, views of #football on TikTok have nearly doubled from 70 billion to 130 billion since the sponsorship was first announced. Similarly, the sports category on Twitch has grown by 155% over the past year, bolstered by the popularity of the UEFA Euro 2020 and the 2020 Summer Olympics¹².

Social media engagement rate

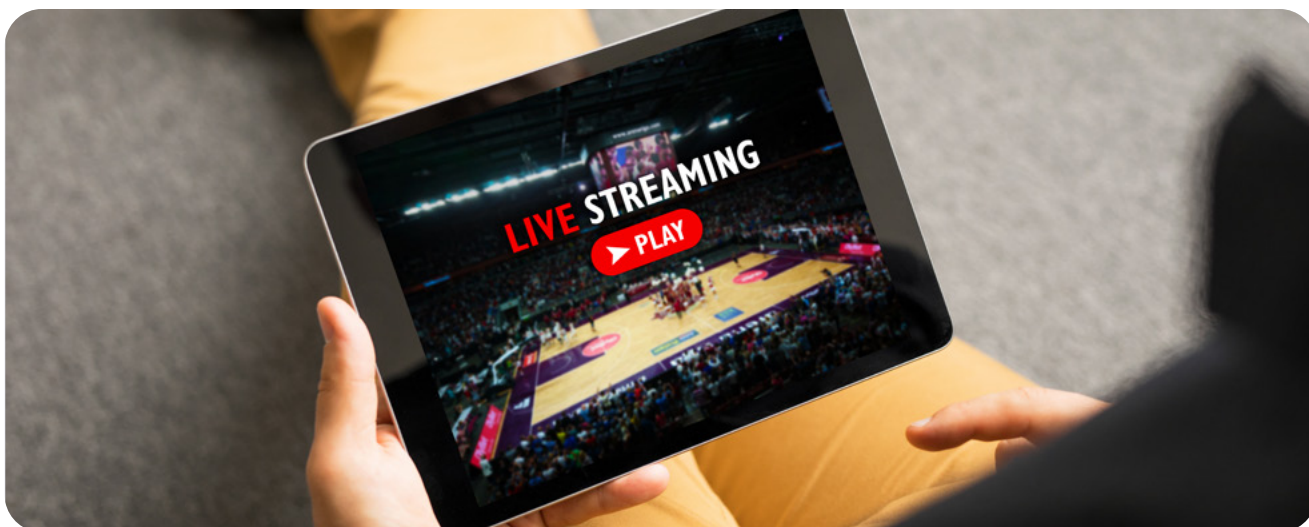
Top 10 most-followed european football clubs



Source: Nielsen Digital Performance Monitoring, Sept. 1, 2020 - June 30, 2021



¹² Nielsen Sports Social Analysis



Rights holders are unbundling media and marketing rights

For sports rights holders, investment in both live and non-live content distribution will be a crucial step in meeting Gen Z fans where they want to consume content. In Spain, for example, La Liga, the country's top soccer league, will launch its own streaming service in early 2022 ("LaLigaPass") for the super fan that will include highlights, interviews, press conferences as well as live and on-demand matches in certain territories.

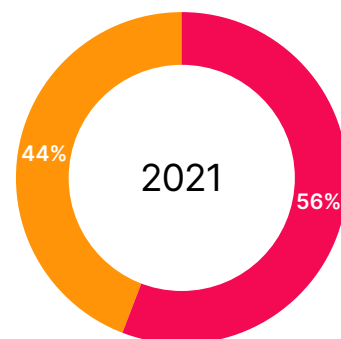
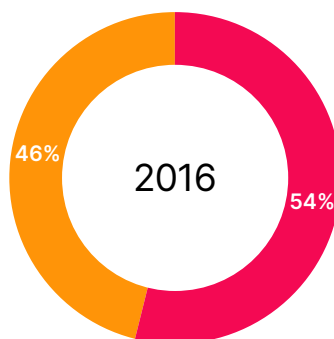
Fans demand new types of content driven by innovative delivery platforms, impacting how rights holders and brands should approach audience engagement and sponsorship outcomes. Rights holders continue to unbundle their media and marketing rights; sponsorable assets have increased 3x over the last five years. While the number of sponsorable assets has increased significantly, the ratio of branding rights versus activation rights has remained largely unchanged. Rights holders are effectively targeting untapped opportunities by creating new and more personalized solutions based on brand objectives.

Split by asset type



x2.7

Growth in number of marketing rights populating teams/ clubs inventories, on average over the last 5 years



● Branding rights

● Activation rights

Source: Nielsen Sports Sponsorship Rights Analysis

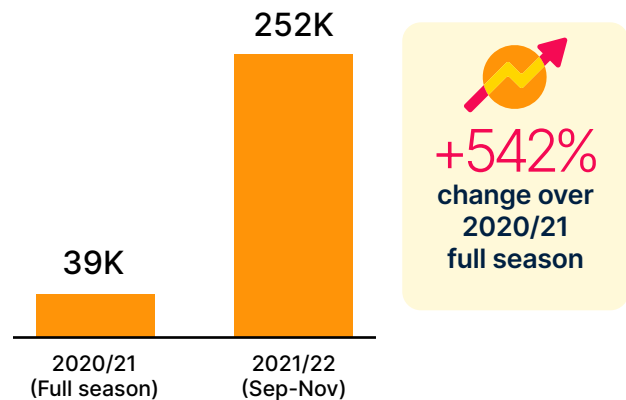
Women's sports: coverage and viewership going nowhere but up

Rights holders are also capitalizing on the increased interest in women's sports, as evidenced by examples like last year's [TV deal](#) between the Women's Super League (WSL) and both the BBC and Sky Sports. Rights deals like these make matches easier to find, and on free-to-air channels. The response has been a significant lift in viewership, showing appetite for women's sports exists but content discovery and exposure play a key role in growth. During the first three months of the 2021-2022 WSL season, per-game viewership was up more than 500% under the new broadcast deal.



Women's Super League viewership

Live U.K. audience - average match

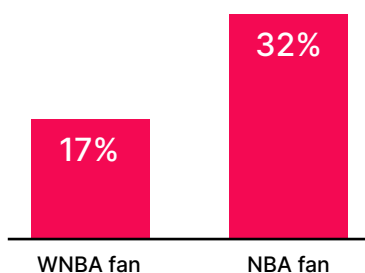


Source: BARB, Live Program Audiences, Linear TV. +/- % Represents Change vs. 2020/21 Full Season across BBC and Sky Sports

Despite growing interest, media and news coverage heavily favor men's sports. For example, a 2018 Nielsen Sports study found that the volume of media coverage of women's sports across Europe [ranged from as low as 2% to just 12% at peak times](#). More recently, Nielsen examined the coverage of women's sports on ESPN SportsCenter. In the 2021 calendar year, the analysis found that SportsCenter provided 91 seconds of coverage for the average WNBA game and 266 seconds of coverage for the average NBA game, a discrepancy that does not match claimed interest of the two leagues. Coverage is not keeping pace with fandom.

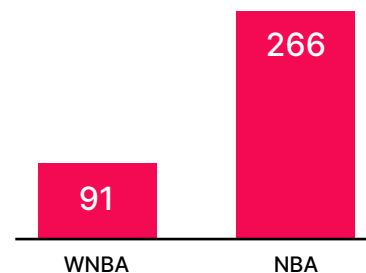
Media coverage falls behind fan interest

Claimed fandom - U.S. population



Source: Nielsen Fan Insights, 2021, USA

SportsCenter average seconds of coverage per game



Source: Nielsen Sports Analysis, 2021 calendar year

SECTION 4

Takeaways

for brands and sports rights holders

Takeaways for sports properties and media owners

1

Identify and maintain a dedicated first-party data strategy

With a defined and robust first-party data strategy, sports properties and media owners will have the foundation they need to make authentic fan connections—delivering timely and nuanced messaging. These connections can be amplified with ongoing data feeds from third-party data partners to gauge fan preferences, thereby driving fan retention and growth strategies. Interactivity while consuming media will only continue to grow—from betting to fantasy sports—and produce new datasets crucial to fan strategy.

2

Determine the right balance between short- and long-term sales objectives

Sports properties and media owners have an overabundance of decisions to make when it comes to determining how and where to market their rights. And they're seeking to do so in ways that contribute meaningfully to revenue. As with any balanced marketing strategy, sports properties and media owners should be steadily evaluating short-term revenue gain and long-term audience development objectives. Importantly, no two approaches to a holistic strategy will look the same. Every owner needs to identify its specific objectives and then leverage what it knows about its audiences and meet them where they are with initiatives that both engage consumers and drive business results.

3

Embrace the power of athletes

Athletes are engaging directly with fans and they do so separately from teams, leagues and sports properties. Athletes often have more social media followers and more trust among fans, but the current media rights landscape makes it extremely difficult for athletes to post in-game content that would also benefit teams and leagues. Greater collaboration and shifting the structure of media rights deals—making it easier for athletes to share live content—will only broaden reach and connectivity for the entire sports ecosystem. Teams and leagues should partner with athletes as amplifiers of content.

4

Measure effectiveness, not just value

With sponsorship sophistication rising, measuring effectiveness at every step is now expected by brands. Predicting ROI and sales lift are necessary tools for sports rights holders to remain relevant and secure marketing budgets from brands.

Takeaways for sponsoring brands

1 Ensure marketing plans are holistic and include definitive influencer marketing strategies

As brands seek ways to establish more personalized connections with consumers, they're engaging social media influencers more heavily than in previous years. In the 2021 Nielsen Annual Marketing Report, for example, marketers planned to increase their social media spend more than any other channel. Influencer strategy should be part of any marketing strategy and when executed properly, these partnerships could be a win-win for brands, as Nielsen's recent Trust in Advertising study found that 71% of global consumers either completely or somewhat trust ads and opinions from influencers about brands and products.

2 Tap into broadening sponsorship opportunities

As traditional and digital worlds merge, the sponsorship lifecycle is broadening, creating additional and more well-rounded monetization opportunities. Brand conversion and predicted sales metrics need to be included in both sponsorship selection and evaluation, creating benchmarks between sports properties and within the overall marketing mix. Leveraging new technology, brands should start to utilize digital platforms to develop fan-engagement strategies that don't exist in linear broadcasting. For example, brands can streamline the purchase journey by simply adding a link to a product or food item to the digital sports content that fans are already watching. This trackable digital engagement will be paramount in measuring sponsor effectiveness.

3 Expand traditional sponsorship measurement

The growing ubiquity of digital enablement among sports fans presents both the opportunity for increasingly customized brand partnerships and new challenges with respect to measuring them. To engage consumers where they are, sponsorship activation campaigns need to be increasingly multi-focused: multi-channel, multi-asset, multi-market. That, in turn, requires comprehensive, granular measurement to both avoid leaving money on the table and validate returns across channels, assets and markets. Brands should also be thinking about comparability with their sponsorship measurement. That way they have a level playing field when they assess performance within the broader marketing mix of non-sponsorship opportunities.

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
- ▶ Maximizing event impact
- ▶ Market intelligence



About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.

An S&P 500 company, Nielsen (NYSE: NLSN) operates around the world in more than 55 countries. Learn more at www.nielsen.com or www.nielsen.com/investors and connect with us on social media.

Audience Is Everything®

