# The sports playbook

Everything you need to know about sports and its fans

GWI.

# In this report



## Methodology & definitions

Figures in this report are primarily drawn from GWI Sports online research among 23,073 internet users who are interested in sports or state that they watch, attend or participate in sports, aged 16-64. The survey is fielded in the following 15 markets: Australia, Brazil, Canada, France, Germany, India, Indonesia, Italy, Japan, Mexico, Philippines, Spain, Thailand, UK, and U.S.A.

We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population. Note that in many markets in Latin America, the Middle-East and Africa, and the Asia-Pacific region, low internet penetration rates can mean online populations are more young, urban, affluent and educated than the total population.

When reading this report, please note that we use a mixture of data from our GWI Sports dataset fielded in Q4 2020 across 15 markets, our GWI Core dataset which is fielded across 47 markets, and GWI Zeitgeist data from March 2021 conducted in the U.S. and UK only.

**Defining sports fans**
Sports fans are defined as those who are extremely or very interested in sports and watch sports at least once a week. This definition rendered a sample of 9,763 sports fans aged 16-64 across 15 markets.

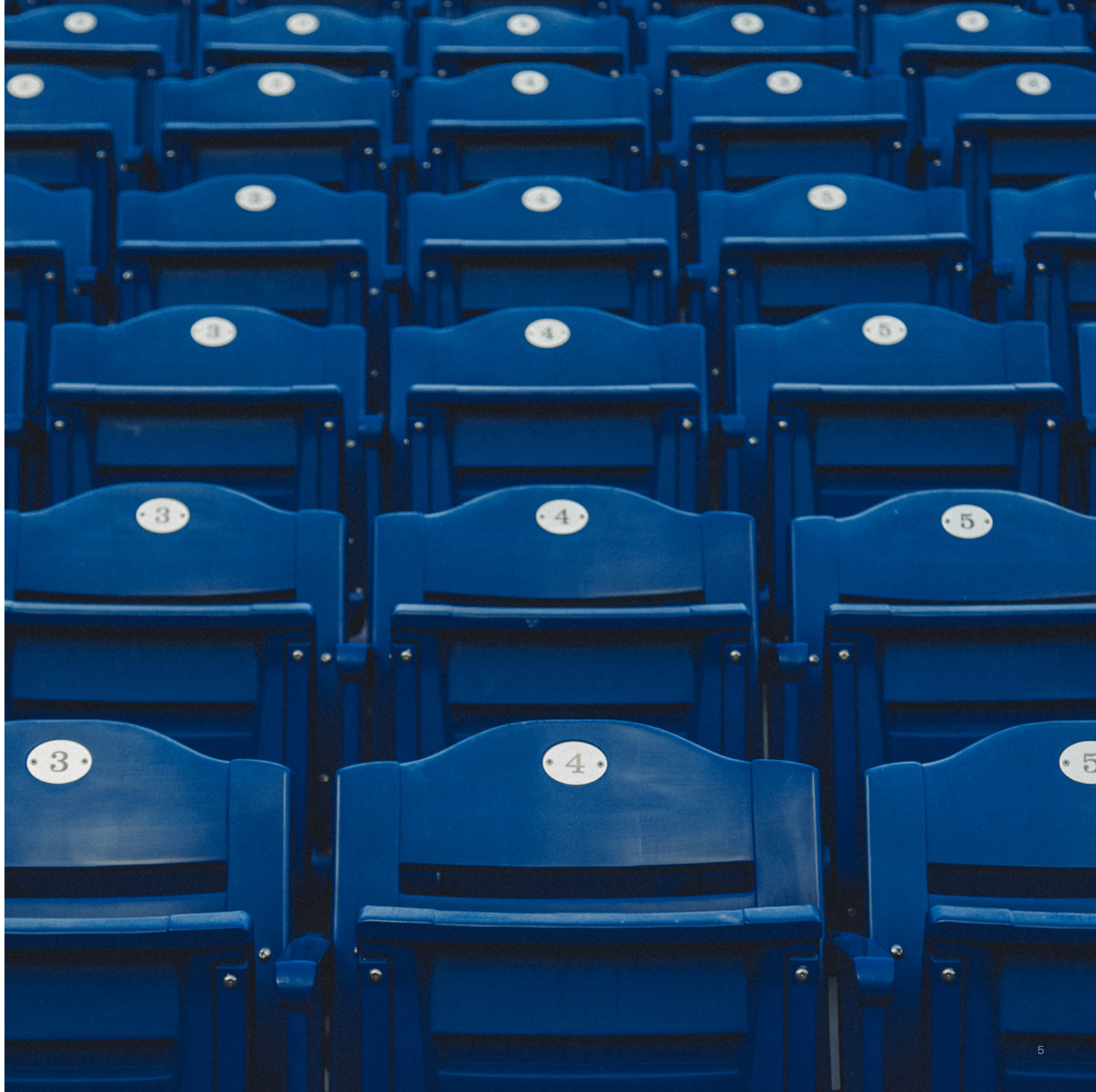
## Introduction

In 2020, COVID-19 ground live sports to a halt. With no spectators in stadiums, sponsorship spend took a hit. Some **estimate** lockdowns caused a $14 billion drop in sponsorship value. In football alone, the top 20 clubs saw a 12% **decrease** in revenue primarily due to drops in matchday and broadcast revenue.

The growing reliance on digital channels via social media, online video, and esports to keep fans engaged was noticeable. We believe these will be sustained in the future as the sports industry strives to attract new audiences and finds more effective ways to measure ROI.

This report uses our latest dataset, GWI Sports, to help navigate sponsors and sports organizations through times of uncertainty, and point them to where the biggest opportunities might be during 2021 and beyond.

By combining GWI Sports with our Core consumer dataset and its recontact capabilities, we're able to dig deeper into sports fans' behaviors and motivations, as well as their attitudes as consumers.



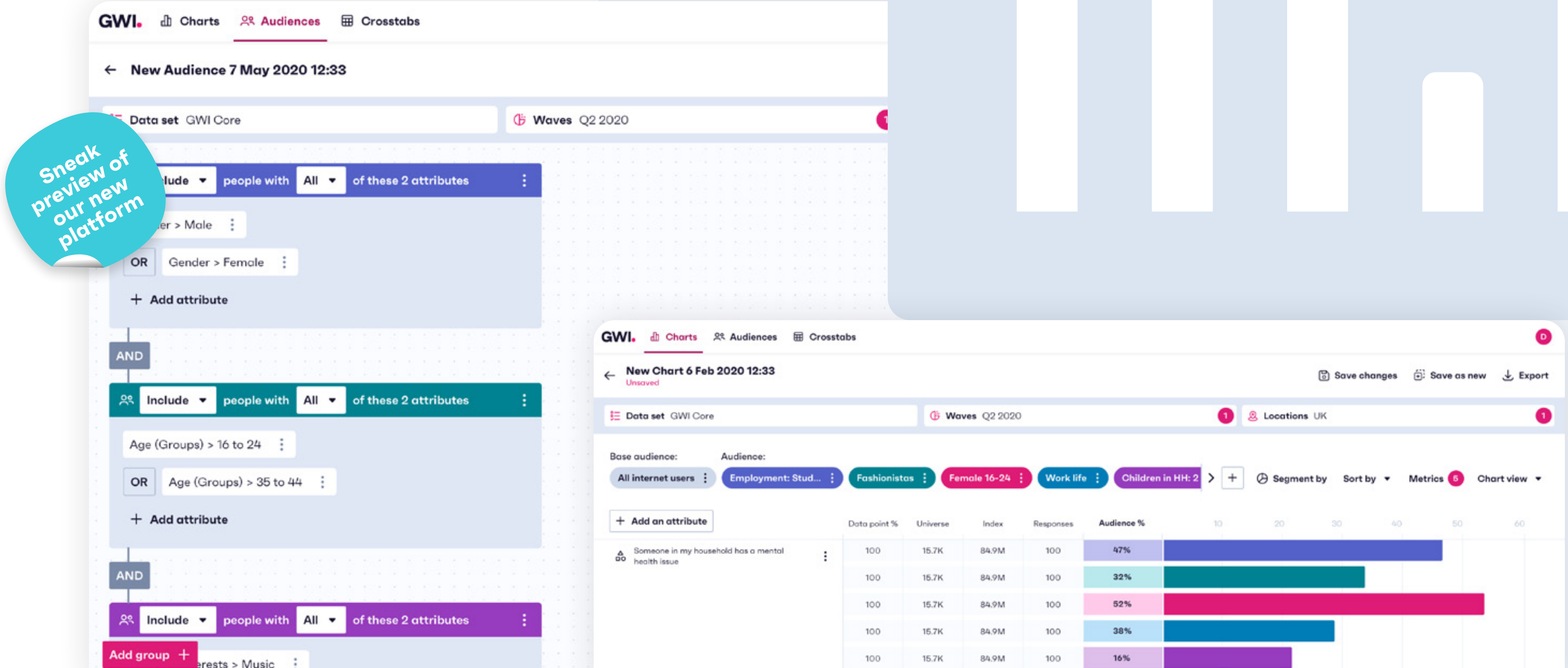
# Discover the data on our platform

Each chart from our ongoing global research in this report contains a hyperlink that will bring you straight to the relevant question on our Platform, where you can investigate all data by demographics, over time, and among your own audiences.

**Click the dots to navigate**

**Each of the graphs is numbered**

More information can be found in the Appendix section at the end of this report




**Just click this icon to explore the data on the platform**

**Source**

**Base**

Information about the source and base

# Key insights

## Mobile and digital channels setting the agenda

The pandemic redefined how fans consume sport. On the whole, TV viewership is down while online streams continue to thrive – a trend that is predominantly driven by Gen Zs and millennials. As providers are shifting their products to keep up, the immersive mobile experience and the subscription landscape are set to evolve – opening up new opportunities for sponsors.

## Digital content keeps fans engaged beyond matchday

From highlights on social media, to sports podcasts and fantasy leagues, there is a ton of digital content to keep fans engaged in the downtime between games, and they're loving it. They're active on social media, engaging with brands, live videos and highlights, and many fans use digital channels to follow leagues they wouldn't be able to access on local channels.

## Values sit at the heart of next-generation fandom

Sport is no longer apolitical; it has a responsibility to listen to fans and be a platform for progressive change. This means fighting for equal rights, supporting the community, and promoting sustainability. The call is coming loudest from society's youngest fans – teams that adopt these values today should expect their fandoms to grow in the future.

## Earning female fans is more rewarding than you might think

Women's sports continues to gather momentum despite the pandemic, and our research shows that those investing in women's leagues and targeting female fans stand to reap the rewards. Although at first female fans appear to be more casual in the way they engage with sports, they're actually much more likely than male fans to act on the back of sponsorship. They're not only more likely to purchase your product, but also advocate for your brand to friends and family after.

## Esports partnerships go beyond the pitch

The sports simulation gaming genre might provide the most straightforward path for sports organizations to enter the esports world. But by staying in their comfort zone, they risk missing out on the big bucks. Our data also shows that even among sports fans, sports isn't the most popular gaming genre they play. Instead, it's genres like shooter and adventure that remain more popular among this audience. It's vital that sports organizations and brands consider branching out beyond sports simulation games to capture the full potential of esports.

01

# 360 degree view of the sports fan

## Who are sports fans?

The popularity of different sports is still largely driven by country and culture. As a result, sports fans around the world are far from a uniform audience. In many countries, the top leagues are national systems, such as the NFL in the U.S. or La Liga in Spain, though some sports leagues have found a way to garner a more global appeal.

Many leagues have seen great success in focusing on expanding their fanbases around the world. The **NBA** started scheduling games and entered into broadcasting partnerships to reach European viewers during prime time, and have also held many games in foreign stadiums over the past decade. These efforts seem to have very real impacts. In Europe, interest in the NBA is up 20% since 2018, and in Australia where the league has partnered with local professional teams, interest is up over 30% in the same period.

These partnerships prove that sports fans have a lot in common around the world. Generally speaking, fans are the archetype of those typically seen in media and commercials.

They skew heavily male, the majority are under 35 years old, and they come from all educational and financial backgrounds. Compared to the average person, they're more frequent purchasers of alcohol, more frequent eaters of fast food, and consider themselves to be more social and outgoing. As we will discuss later in the report though, this model of a sports fan is being redefined by younger generations.

# Who are sports fans?

% of sports fans who fall in the following categories



| | All sports fans | Average age | Gender (female) | Gender (male) |
|---|---|---|---|---|
| Australia | 39 | 37 | 78 | 22 |
| Brazil | 52 | 35 | 67 | 33 |
| Canada | 35 | 38 | 76 | 24 |
| France | 35 | 38 | 75 | 25 |
| Germany | 45 | 40 | 73 | 27 |
| India | 68 | 29 | 71 | 29 |
| Indonesia | 47 | 30 | 68 | 32 |
| Italy | 48 | 41 | 74 | 26 |
| Japan | 27 | 40 | 75 | 25 |
| Mexico | 50 | 33 | 66 | 34 |
| Philippines | 45 | 31 | 68 | 32 |
| Spain | 44 | 39 | 73 | 27 |
| Thailand | 41 | 34 | 68 | 32 |
| UK | 42 | 38 | 77 | 23 |
| U.S. | 44 | 39 | 72 | 28 |

## Top leagues by country

| Country | League | % |
|---|---|---|
| Australia | Summer Olympics | 69 |
| | Australian Open (Tennis) | 61 |
| Brazil | Copa Libertadores | 79 |
| | FIFA World Cup | 79 |
| Canada | Summer Olympics | 79 |
| | Winter Olympics | 74 |
| France | Summer Olympics | 84 |
| | FIFA World Cup | 71 |
| Germany | Summer Olympics | 71 |
| | Winter Olympics | 71 |
| India | ICC World Cup (Cricket) | 75 |
| | Summer Olympics | 73 |
| Indonesia | FIFA World Cup | 77 |
| | Liga 1 Indonesia | 76 |
| Italy | Serie A | 84 |
| | Summer Olympics | 79 |
| Japan | Summer Olympics | 78 |
| | Winter Olympics | 69 |
| Mexico | Liga MX | 84 |
| | Summer Olympics | 77 |
| Philippines | NBA | 84 |
| | Philippine Basketball Assoc. | 82 |
| Spain | LaLiga | 84 |
| | Summer Olympics | 83 |
| Thailand | Summer Olympics | 73 |
| | FIFA World Cup | 69 |
| UK | FIFA World Cup | 79 |
| | Summer Olympics | 76 |
| U.S. | NFL | 75 |
| | Summer Olympics | 74 |

GWI Sports Q4 2020 · 9,763 sports fans aged 16-64

## The multi-channel fan

For the last few years, the portion of consumers watching sports on broadcast TV has seen a steady decline, while online formats have grown, and the market for digital services now offering live sports is abundant.

Data from GWI Sports gives us further insight into just how popular digital sports viewership has become around the world.

Broadcast TV is still the main medium for viewing games and matches, yet online formats are beginning to show signs that might threaten this supremacy. Online formats are just as, if not more popular for viewing sports matches on a regular basis in Asia, where as of 2020, viewers spend nearly the same amount of time watching broadcast TV as online streaming.

And sports organizations have poured a ton of resources into reaching global streaming fans. The NBA League Pass brings games to viewers in over 200 countries, and when these types of services aren't available in their region, nearly 4 in 10 sports fans who have used a VPN in the past month can find a way to view games online.

In between games, many fans are engaging with print and audio media to keep in the loop, with print media being more popular for sports fans than you might expect. Even still, readers of print sports media are a digitally connected audience, and are more likely than the average fan to also follow sports on social media or other websites.



### Sports fans keep up with the action on multiple channels

| | % who watch sports weekly... On TV | Online | % who follow sports via... Print | Podcasts |
|---|---|---|---|---|
| Australia | 76 | 51 | 35 | 41 |
| Brazil | 81 | 70 | 42 | 37 |
| Canada | 75 | 49 | 37 | 39 |
| France | 72 | 45 | 42 | 42 |
| Germany | 69 | 54 | 49 | 33 |
| India | 79 | 75 | 54 | 34 |
| Indonesia | 80 | 80 | 39 | 25 |
| Italy | 76 | 65 | 45 | 33 |
| Japan | 81 | 68 | 41 | 21 |
| Mexico | 86 | 77 | 32 | 31 |
| Philippines | 80 | 80 | 33 | 29 |
| Spain | 82 | 67 | 52 | 45 |
| Thailand | 76 | 75 | 29 | 25 |
| UK | 80 | 52 | 47 | 47 |
| U.S. | 84 | 59 | 35 | 46 |

GWI Sports Q4 2020 9,763 sports fans aged 16-64

## The lasting effect of COVID-19

As more people receive COVID-19 vaccinations during 2021, the question for many is: will fans return to stadiums?

In some parts of the world, stadiums have already opened up to full or limited capacity, and the results are very promising. Australia, for example, has taken the **Southern Hemisphere post-COVID record** of over 50,000 fans for an AFL match, but it's unclear if these numbers will remain high once the excitement of the first few weeks back subsides.

In fact, our data hints that this might not be the case, with just over half of all sports fans saying they're less likely to attend live events in-person due to COVID-19. Stadiums may find that fans have grown more comfortable watching games from home and need some convincing to return to live events outside of early season matches.

Millennials pose the greatest opportunity for stadiums in the near future. This age group is not only more likely than average to say they missed sports during COVID-19, but also most likely to say they regularly attend games already, with nearly 7 in 10 attending a live match every 6 months or more frequently.

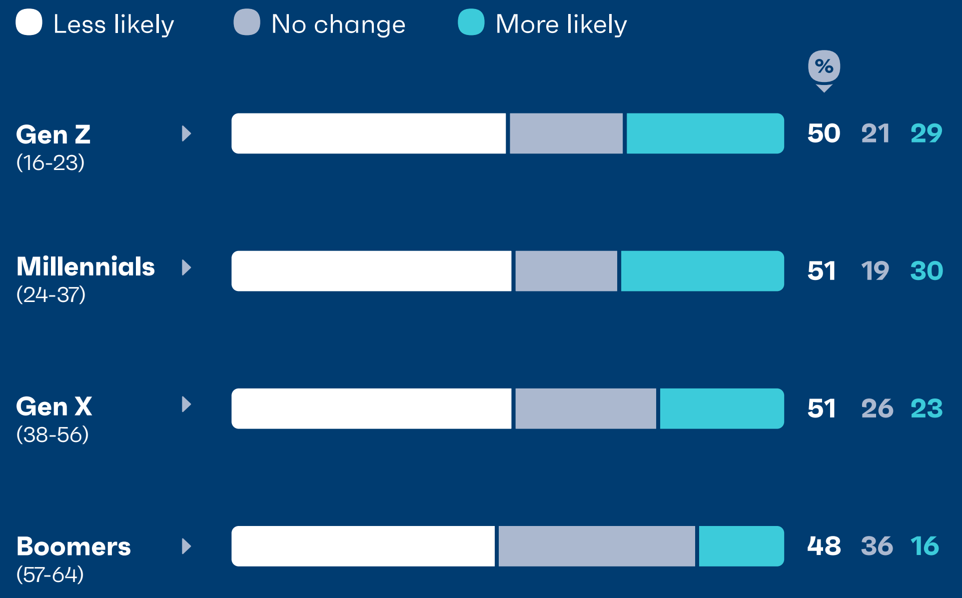
# COVID-19 may have a lasting effect on stadium attendance

3

% of sports fans in each generation who said they missed attending live sporting events during COVID-19

| % | Gen Z (16-23) | Millennials (24-37) | Gen X (38-56) | Boomers (57-64) |
|---|---|---|---|---|
| | 44 | 49 | 50 | 45 |

% of sports fans who say COVID-19 made them more/less likely to attend live events (e.g. sports matches, concerts)




GWI Sports Q4 2020 | 9,763 sports fans aged 16-64

02

# And we're live!

## Streaming mitigates the viewership decline

Summer 2020 will be remembered as the year when Wimbledon's courts remained covered up, the Olympic torch wasn't lit, and cameras around the globe switched off. But as professional sport has returned, how consumers watch it has changed.

The majority of televised sports had less TV viewers at the end of 2020 than at the end of 2019. Many factors may play into this, such as the empty stadiums, or the inability for viewers to watch with their friends.

That said, some sports have been able to mitigate the pandemic's impact by growing their online viewers. Swimming, for example, has seen a decline in TV viewers but a slight uptick in online streamers.

This shift in sports consumption is predominantly driven by the digitally savvy Gen Zs and millennials, and it's an indication of how important it is to get younger fans on board with so much viewing displaced to digital. Compared to all our tracked sports, cricket watchers have the youngest average age. It was this audience, at 19%, that witnessed the greatest growth year-on-year in viewing their sport online.





## How COVID-19 changed the way we watch sport

Sorted by the world's most popular sports

| Sport | % who follow the below sports | % change in those watching on broadcast TV since Q4 2019 | % change in those watching online since Q4 2019 |
|---|---|---|---|
| Soccer | +80 | -3 | +1 |
| Basketball | +50 | +1 | +8 |
| Cycling | +35 | 0 | +3 |
| Swimming | +35 | -6 | +4 |
| Tennis | +34 | -6 | -3 |
| Motor sports | +33 | -5 | 0 |
| Boxing | +30 | -1 | +4 |
| Athletics | +28 | -7 | 0 |
| Volleyball | +26 | -6 | +12 |
| Martial arts (e.g. UFC) | +26 | -4 | +6 |
| American football | +23 | -10 | -5 |
| Badminton | +23 | -2 | +9 |
| Gymnastics | +22 | -9 | +7 |
| Cricket | +21 | 14 | +19 |
| Winter sports (e.g. skiing) | +20 | -10 | +2 |
| Baseball | +18 | -14 | -5 |
| Table tennis | +18 | -6 | +7 |
| Long-distance running | +16 | +1 | +10 |
| Golf | +15 | -15 | -7 |
| Surfing | +13 | -5 | +11 |
| Ice hockey | +12 | -19 | -11 |
| Rugby | +11 | -15 | -10 |
| Horse riding/equestrian | +10 | -10 | +4 |
| Triathlon | +10 | +4 | +13 |
| Sailing | +8 | -10 | -12 |
| Rowing | +8 | -16 | -3 |
| Field hockey | +6 | -11 | 0 |
| Squash | +5 | -13 | 0 |
| Netball | +4 | -9 | 0 |

GWI Core Q4 2019 & Q4 2020 | 91,898 internet users interested in watching sport aged 16-64

## The immersive experience

While many people may be partial to locking themselves away for the occasional Netflix binge, the same can't quite be said for watching sport. It's a social activity, with just 15% of sports fans saying they'll typically watch it alone – falling to 8% of female sports fans.

Sports fans are most comfortable watching at home. In a year where viewers have been doing this like never before, it's not surprising that many are turning to online streams to access their favorite sports matches and events. As the world continues to open up, social gatherings are becoming possible again – and watching at a friend's house is far more popular than going to a bar.

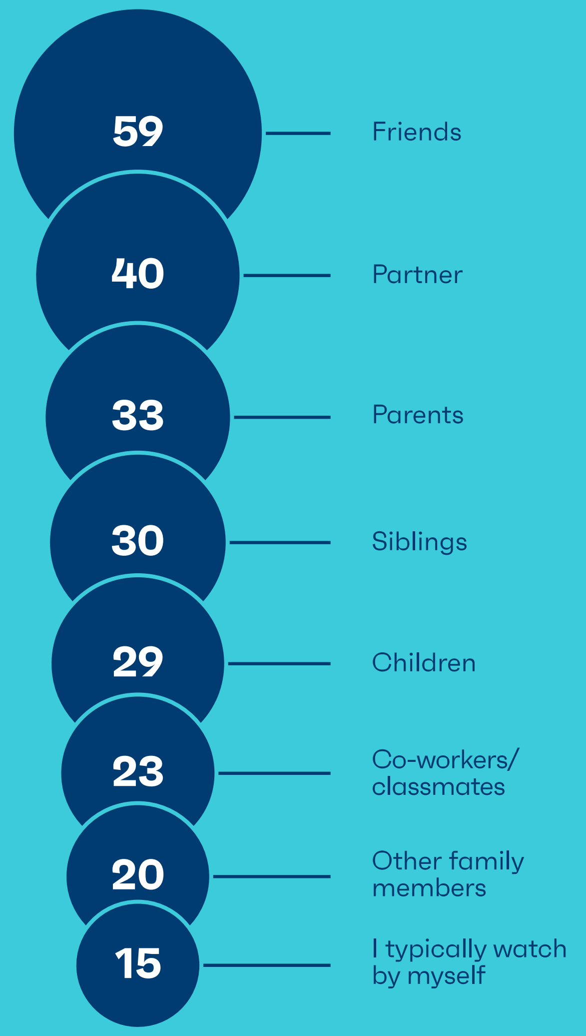
Moreover, mobile viewership has hit the big time – 3 in 10 sports fans now watch sports this way. Broadcasters have used technology to replicate the stadium experience on the small screen – for example, **BT's Matchday Experience** uses augmented reality to transport subscribers from their sofas to the heart of the gameday experience.

While a very small proportion of sports fans are specifically looking for AR functions in their next phone, the fact that they're 47% more likely than the average internet user to say this is testament to the technology's potential in the industry. And with half of all sports fans less likely to attend live events in the aftermath of COVID-19, fans will continue to look for new ways to connect with their favorite sports.

### Watching sport is a social activity

5

% of sports fans who typically watch it with their...



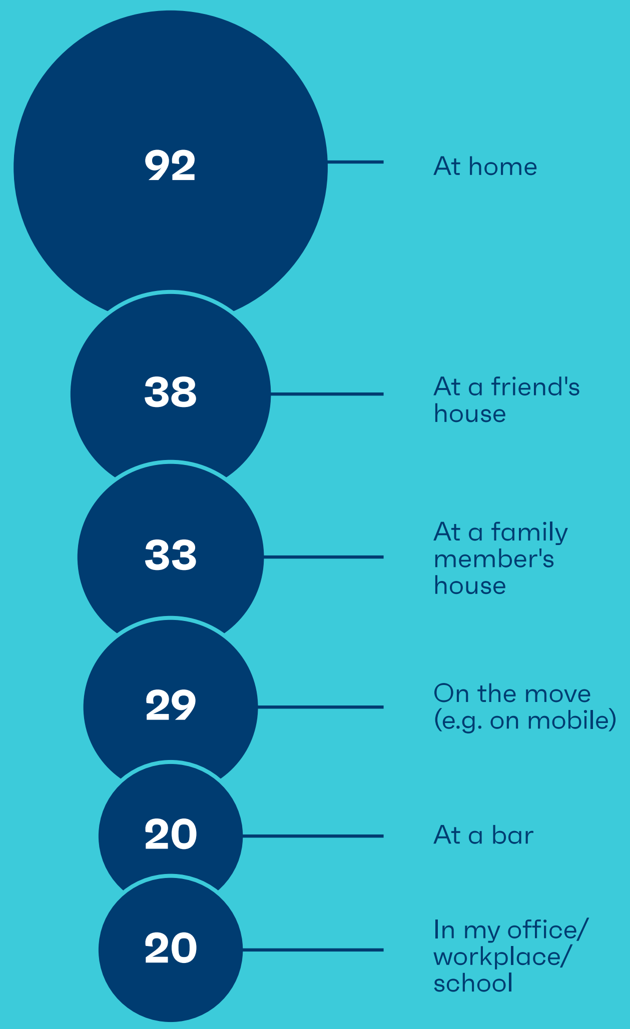

GWI Sports Q4 2020

9,763 sports fans aged 16-64

### Sports in the comfort of our own homes

6

% of sports fans who typically watch it...




GWI Sports Q4 2020

9,763 sports fans aged 16-64

## The subscription leagues

Around the world, consumer willingness to pay for live sport varies tremendously. This is because sports subscriptions are usually country-specific and each marketplace varies, dependent on the availability of free-to-air sports coverage, the ability for a bill-payer to share their account with others, or the associated costs of subscriptions.

In some markets we're seeing specific sport subscriptions gain more popularity than the traditional top network providers. For example, the top paid-for service for consideration in the U.S. is **NFL Game Pass** – with 82% of American sports fans interested in football this is hardly surprising. Fans are starting to show a preference for services that extensively cover a singular, favorite sport vs. services that provide broad – yet less in-depth – access to a lot of different sports.

That said, broader services like Amazon won't be dissuaded from venturing into sports streaming. While the ecommerce giant does tend to sign smaller rights licenses, it can rely on its existing ecommerce offerings to win over consumers. From 2023, Amazon will **broadcast** 15 Thursday Night Football games and one pre-season game a year in America. While this may not be enough for the most die-hard NFL fan, it's likely to turn heads of others. The provider is already the top service for consideration in 7 of our 15 markets, and its ambitions certainly don't stop there.

## Sports subscribers around the world

% of those interested in sports in the following countries who pay for a subscription/use the following services

- % who pay for a subscription
- % who use these services

| Country | % who pay for a subscription | Service | % |
|---|---|---|---|
| France | 48 | Canal+ | 37 |
| | | beIN Sports | 37 |
| | | RMC Sport | 34 |
| Italy | 55 | Sky Sport | 49 |
| | | DAZN | 45 |
| | | Mediaset | 40 |
| Spain | 56 | Movistar | 56 |
| | | Amazon Prime video | 39 |
| | | Eurosport | 26 |
| Australia | 49 | Fox Sports | 47 |
| | | ESPN | 28 |
| | | Amazon Prime video | 16 |
| Germany | 54 | Eurosport | 48 |
| | | Sky Sport | 43 |
| | | Amazon Prime video | 42 |
| Japan | 47 | DAZN | 37 |
| | | Amazon Prime video | 35 |
| | | Hulu | 12 |
| Thailand | 55 | Premier Sports | 48 |
| | | Fox Sports | 36 |
| | | Eurosport | 33 |
| Brazil | 60 | SporTV | 75 |
| | | Fox Sports | 71 |
| | | ESPN | 66 |
| India | 77 | ESPN | 67 |
| | | Amazon Prime video | 66 |
| | | WWE Network | 44 |
| Mexico | 47 | Fox Sports | 82 |
| | | ESPN | 77 |
| | | Amazon Prime video | 44 |
| UK | 62 | Sky Sports | 60 |
| | | BT Sport | 47 |
| | | Amazon Prime video | 45 |
| Canada | 45 | TSN | 60 |
| | | ESPN | 38 |
| | | Amazon Prime video | 30 |
| Indonesia | 57 | Fox Sports | 50 |
| | | Premier Sports | 48 |
| | | beIN Sports | 46 |
| Philippines | 49 | ESPN | 75 |
| | | Fox Sports | 67 |
| | | NBA League pass | 67 |
| U.S. | 45 | ESPN | 71 |
| | | NBC | 55 |
| | | Fox Sports | 52 |

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# Sponsorship activation

% of fans of the following sports who tend to notice these types of sponsorship

## American Football fans

| | % |
|---|---|
| Shirt sponsorship | 63 |
| LED boards around pitch/stadium | 47 |
| Big screen/jumbotron | 41 |
| Stadium naming | 40 |
| Static boards around pitch/stadium | 36 |
| Interview backdrop | 33 |
| Sleeve sponsor | 31 |

## Motor Sports fans

| | |
|---|---|
| Shirt sponsorship | 66 |
| LED boards around pitch/stadium | 53 |
| Big screen/jumbotron | 41 |
| Static boards around pitch/stadium | 41 |
| Driver helmet | 38 |
| Vehicle wraps | 37 |
| Stadium naming | 37 |

## Soccer fans

| | |
|---|---|
| Shirt sponsorship | 65 |
| LED boards around pitch/stadium | 50 |
| Static boards around pitch/stadium | 39 |
| Big screen/jumbotron | 36 |
| Interview backdrop | 33 |
| Stadium naming | 32 |
| Kit manufacturer | 31 |

## Tennis fans

| | |
|---|---|
| Shirt sponsorship | 65 |
| LED boards around pitch/stadium | 49 |
| Big screen/jumbotron | 41 |
| Static boards around pitch/stadium | 39 |
| Stadium naming | 37 |
| Interview backdrop | 35 |
| Kit manufacturer | 32 |

GWI Sports Q4 2020 5,584 American football, 6,191 motor sports, 12,736 soccer, and 9,787 tennis fans aged 16-64

# Spotlighting the Tokyo Olympics

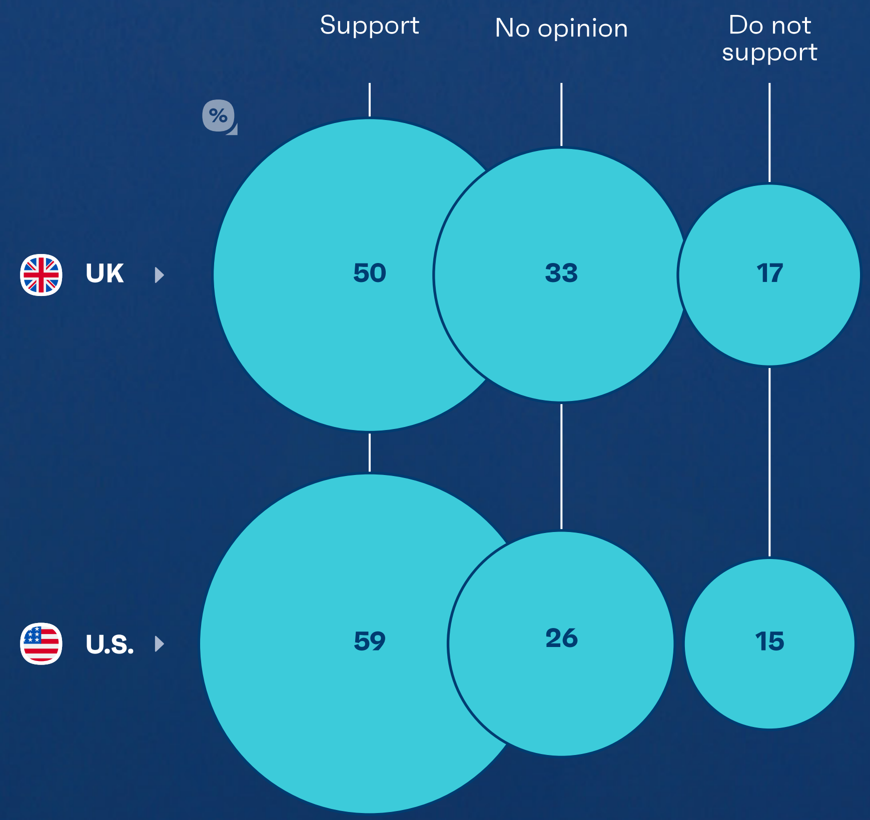
Back in March 2020 we asked consumers whether the Tokyo Olympics should go ahead, and only 5% across 13 markets said they should regardless of the situation. Public opinion was overwhelmingly toward postponement (36%) or cancellation (12%). Fast forward to 2021 and the Olympic Games are officially happening. As the first global live event since COVID-19, they offer a glimpse into what we can expect for the future.

GWI Zeitgeist research in the UK and U.S. from March 2021 shows that support for the event taking place has dramatically increased to 45%, and the fact that international spectators won't be allowed isn't really an issue for fans. With half in the UK and 6 in 10 in the U.S. supporting the Olympics going ahead without fans from their country, it's unlikely that this decision will hurt viewership rates. This is because the appetite for the event is high (45% are looking forward to it), but the general demand for in-person attendance isn't, and fans are still wary of public gatherings.

# The lack of international spectators unlikely to hurt fan engagement

9

% of U.S./UK internet users who support/don't support the Olympics going ahead without fans from their country in the venues




GWI Zeitgeist March 2021

2,010 (UK) and 1,865 (U.S.) internet users aged 16-64

03

# Outside the event


## Sports engagement on social media

Sports fans' love of the game extends well beyond match-day, making the potential for added content very high. Commentary, highlights, and behind-closed-door access to teams, coaches, and players have long been staples of broadcast sport networks like ESPN and Sky Sports, but there are now many more ways fans can connect to the sports they love.

The pandemic pushed sports organizations to find new ways to connect with fans, and social media became the key channel. Examples of this are plentiful, with the world-famous football club, Real Madrid's, social media content pivot epitomizing the trend. By doubling down on their highlights, **Real Madrid** was able to cater to fans who use their social feed as a second-screen, and act as a content provider in a time where digital content was being consumed in droves.

Like other content on social media, sports content is geared heavily toward video, and user bases are driven in large part by younger viewers. YouTube holds the top spot, with over half of sports fans using the platform to follow sports, reaching as high as 60% among Gen Z sports fans.

The financial potential for brands and sponsors in the space is readily apparent, as over half of sports fans who use social media to follow sports also use social media to find new brands and products to buy.

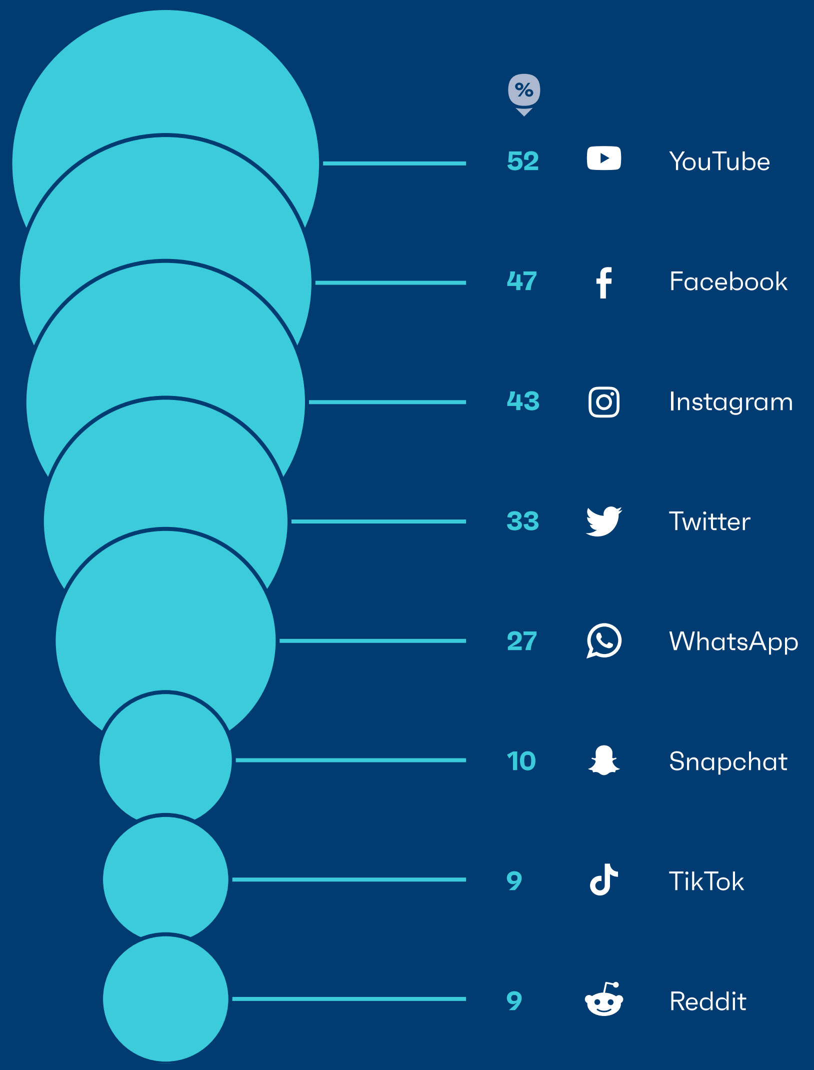
Many users are regularly visiting company social media pages or watching branded videos, and livestream viewership in particular has found unique success for sports fans compared to typical social media users.

Want more insight into what people do on social media and why? **Download our latest flagship report to find out**

# Sports fans love engaging with video and branded content on social

10

% of sports fans who use these platforms to follow sports (e.g. read articles, watch coverage or clips)




GWI Sports Q4 2020 9,763 sports fans aged 16-64

11

% of sports fans using the following platforms who took these actions in the past month


GWI Sports Q4 2020 9,763 sports fans aged 16-64

## Highlight reels across media

At the outset of sports' return to play, many leagues used the lack of spectators as an opportunity to bolster their filming capabilities.

Super Bowl LV was filmed by **120 cameras**, and from LaLiga to the NHL, many leagues experimented with new camera angles and AR technologies to give fans at home an even better viewing experience than they would get in the stadium.

All of this technology has certainly raised the quality of highlights that sports broadcasters are able to put together, which has drawn a big crowd on TV and online.

A massive portion of the consumers who are watching sports events regularly also watch highlights with the same frequency, and though broadcast TV is still the main medium with which consumers are viewing both types of content, online platforms are definitely threatening that supremacy.

Unlike social media usage, viewing sports highlights online is slightly more evenly spread throughout the generations. Most notably, baby boomers are more likely to view sports highlights online than the events themselves, suggesting that older fans see online as a highlights-first medium, whereas the reverse is true for younger fans.

The success of highlights as a standalone way to follow sports has garnered huge investments from tech companies into this type of content, like Facebook's recent **patent filing** to create game recaps from digital data of followers and broadcasters.

Highlights are also a great way to broaden an organization's potential market and for many leagues, they're used to engage with overseas fans. For instance, followers of the Australian Football League who live outside of Australia are over 25% more likely than the average sports fan to watch highlights online on a weekly basis.





# Online highlights more popular than streaming events among boomers

% of sports fans who do the following at least once a week

| % | Watch sports events on TV | Watch highlights on TV | Watch sports events online | Watch highlights online |
|---|---|---|---|---|
| **Gen Z** (16-23) | 77 | 69 | 71 | 64 |
| **Millennials** (24-37) | 79 | 70 | 74 | 67 |
| **Gen X** (38-56) | 83 | 70 | 66 | 64 |
| **Boomers** (57-64) | 84 | 67 | 46 | 52 |

GWI Sports Q4 2020

9,763 sports fans aged 16-64

## Betting on the fantasy

Fantasy sports is a **multi-billion dollar industry**. Its popularity has grown tremendously in the past decade, partly fueled by greater digital adoption around the world, and by companies like FanDuel and DraftKings that add near immediate financial prizes for success in fantasy leagues.

Fantasy sports activity is driven by younger fans, millennials in particular. However, adoption differs widely between countries and leagues.

In many cases, the popularity of a fantasy sport mirrors its real-life fandom for a particular country. For instance, in the U.S. 3 in 10 NFL fans play fantasy football, and in India 38% of cricket fans play fantasy cricket.

The gambling aspect of these fantasy sites is also a huge driver for the success of fantasy sports overall. Nearly 4 in 10 sports fans who play fantasy sports say that betting ads excitement to sports events, and over a quarter of fantasy players actively bet on live sports.

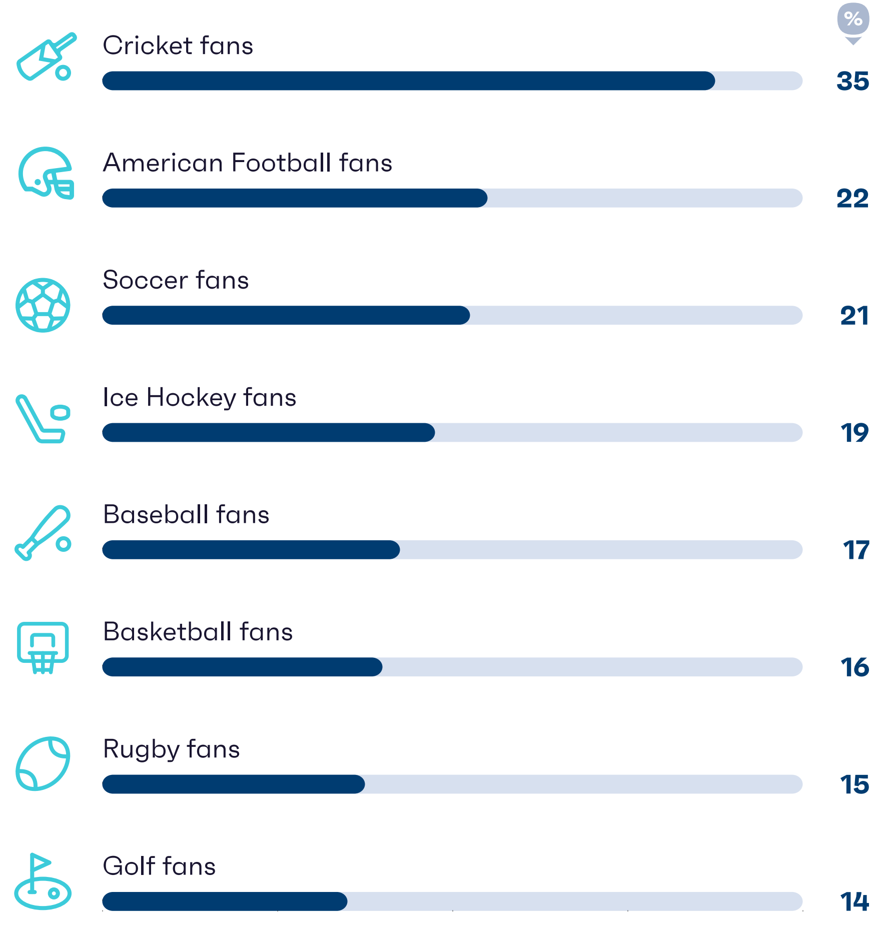
With this competitive nature in mind, it's no surprise that fantasy players spend a huge amount of time online gathering information for their fantasy leagues. Compared to other sports fans, fantasy players are over 60% more likely than average to watch highlights online multiple times a day, and are over 30% more likely to listen to sports radio or podcasts.

The social aspect of fantasy might be even larger than expected, as nearly 60% of fantasy players attend professional games at least once a quarter, and less than 10% say they typically watch sports alone.

# Fantasy sports has varied engagement across different fandoms

13

% of sports fans who also play in a fantasy league for that sport




GWI Sports Q4 2020 9,763 sports fans aged 16-64

04

# Fans of the future

## How CSR will win over new fans

Any business would love to have customers as loyal as diehard sports fans are to their favorite team. However, while sports teams in the past could rely on new fans coming from the friends and families of current supporters or perhaps just by being the biggest local club, young fans today have a whole host of new expectations. Many new fans will only lend out their support if they feel a club represents their values.

Younger fans in particular believe sports divide more than unites, and many think it's too male dominated. As these fans grow older, sports and politics are set to become increasingly interconnected. Simultaneously their voice (and spending power) will only increase, so sports teams and brands alike must respond.

This sentiment is also reflected by the value young sports fans put on the community. They like to support others and will pay for products and services to access the community built around them. These young fans might be ready to join the fandom, but teams must work to win them over by reflecting their core values; if they don't, they'll likely throw their support elsewhere.

One way to compete is on environmental credentials. Younger sports fans are more likely to say that helping the environment is important, and that they'd pay more for an eco-friendly product. As a result, sports clubs are taking note of the financial incentives associated with catering to their young fans' environmental concerns. And some clubs are making **big headlines** in doing so.

Forest Green Rovers is a prime example. With its 100% green energy stadium and matchday vegan food service, the Rovers were recently named by FIFA as the world's most sustainable soccer club. Elsewhere, Juventus now release an annual PWC-verified sustainability report in an effort to boost transparency at the club. And lastly, in Formula E sustainability sits at the heart of the sport – the championship actively promotes electric mobility and renewable energy solutions to, in its own words, race **"for a cleaner future, faster."**



# Young sports fans have high values

% of sports fans in each age group who agree with the following

### Sports are no longer apolitical

| % | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 |
|---|---|---|---|---|---|
| Women's sports should be highlighted more by the media | 54 | 47 | 51 | 47 | 44 |
| Sport is too male-dominated | 23 | 24 | 21 | 12 | 12 |
| Sport divides us more than it unites us | 15 | 16 | 16 | 8 | 5 |

### Community is key

| % | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 |
|---|---|---|---|---|---|
| Contributing to my community is important to me | 50 | 46 | 45 | 47 | 41 |
| I buy products/services to access the community built around them | 22 | 22 | 23 | 10 | 7 |

### The environment is front-of-mind

| % | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 |
|---|---|---|---|---|---|
| I'd pay more for an eco-friendly product | 70 | 66 | 63 | 64 | 57 |
| Helping the environment is important to me | 69 | 64 | 60 | 62 | 58 |

GWI Sports Q4 2020 | 9,763 sports fans aged 16-64

## Young sports fans and the power of social media

While generally younger people spend more time on social media, for most sports accounts – such as coaches, leagues, or sports commentators – followers under the age of 45 are actually distributed quite evenly. The anomaly is athlete followings: these audiences skew young.

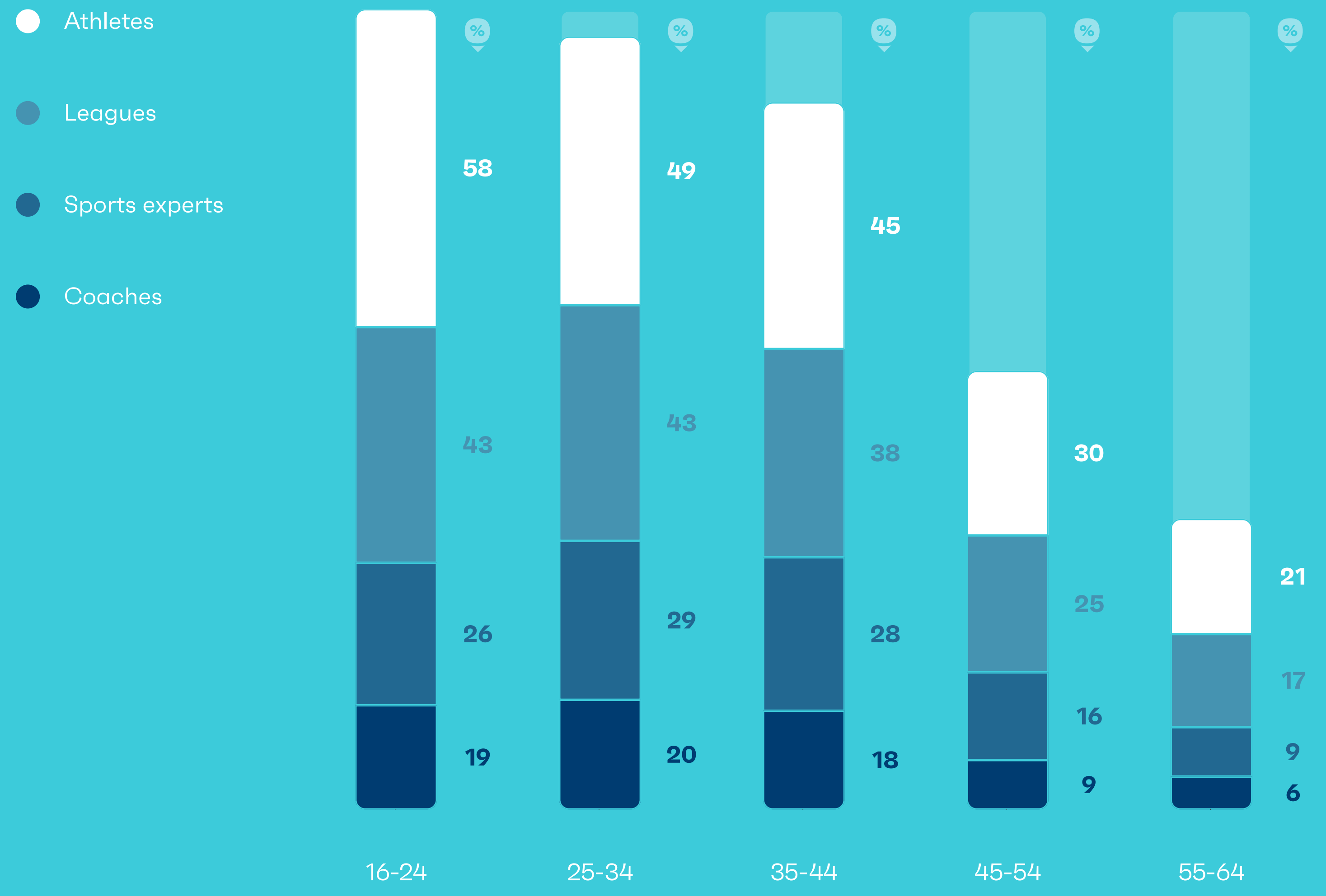
So athletes have a distinct impact on young people, which has helped them emerge as spokespersons for their progressive values. Of course this is no new phenomenon. But today athletes feel empowered by their followings and are unafraid to lose commercial opportunities through 'controversial' altruism. In fact, many brands strive to be involved. Lewis Hamilton's Mercedes team ran **black-liveried cars** in F1 2020 as a public pledge to improve diversity, Marcus Rashford **joined forces** with the likes of Tesco, Aldi, and Waitrose in his petition for free school meals, and Nike's "Dream Crazy" advert starring Colin Kaepernick **won an Emmy**.

Activism aside, the pandemic has spurred leagues to broaden their social media scope. This will be key to capturing the fan of the future. Formula 1 is leading the way here – the sport has seen the **fastest growth in engagement** year-on-year across Facebook, Twitter, Instagram, and YouTube compared to all other major sports. Elsewhere, **TikTok signed a deal with UFC** to carry live, weekly short-form programming, while NBA developed **Top Shot**, a blockchain-based trading card system.

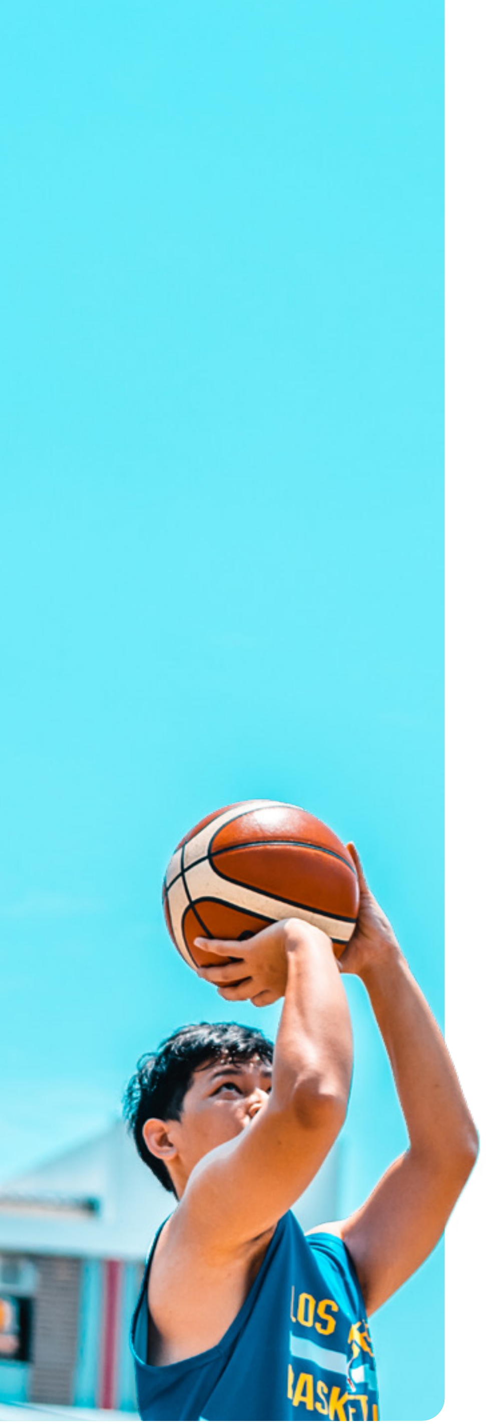
15

### Athletes are influential to young sports fans

% of sports fans in each age group who follow these accounts on social media




GWI Sports Q4 2020    9,763 sports fans aged 16-64

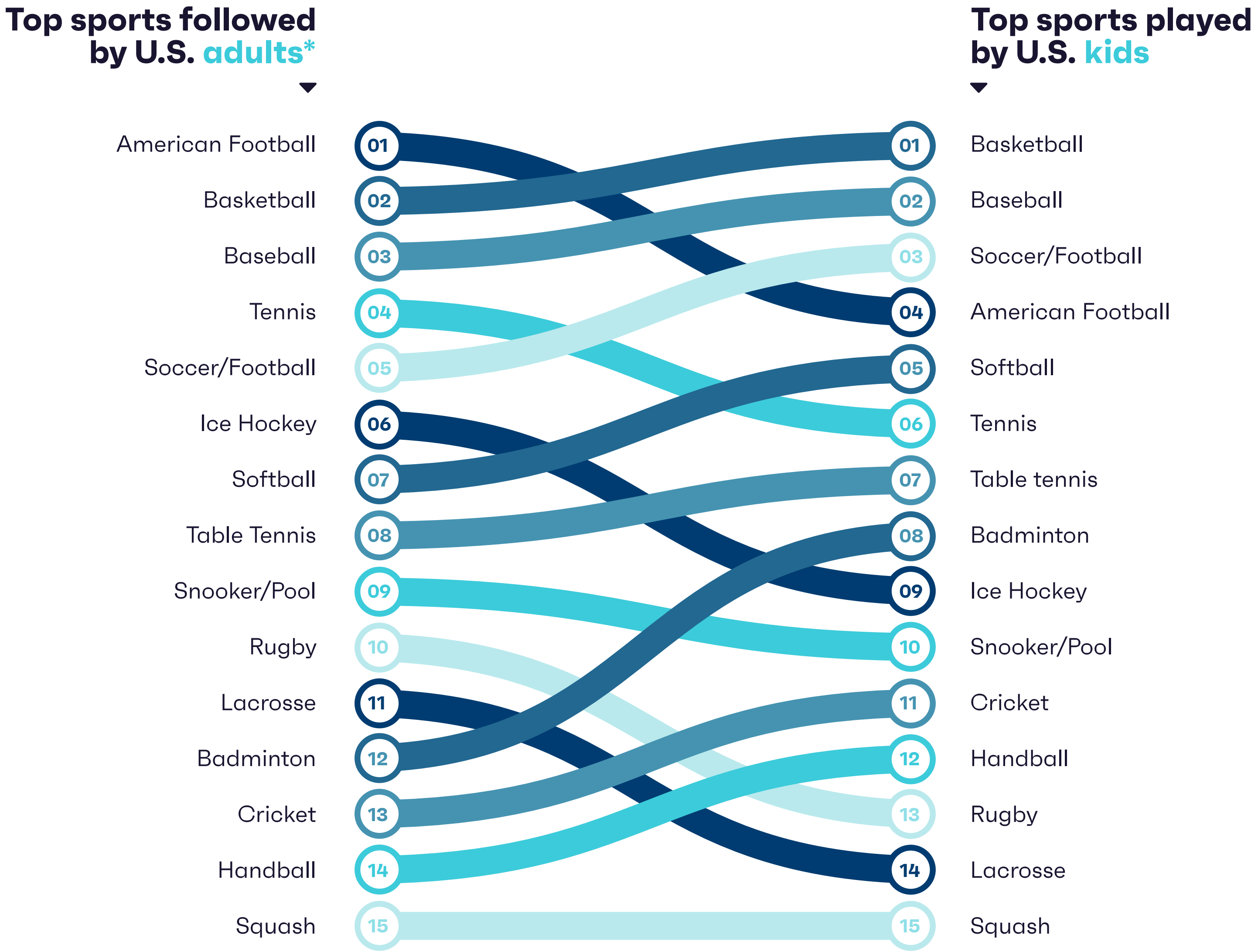


## Sport participation among kids has evolved: will support follow suit?

Forward-thinking brands need to be considering their next generation of supporters, and not just for their values. In many markets across the globe, sports participation among children does not reflect the sports their parents are interested in. While it's by no means a hard-and-fast rule, for the most part adults are more likely to follow sports they played in their childhoods. This means that the fans of the future are likely to be distributed across sports in a considerably different manner to how their parents are today.

Let's take the U.S. as an example. We can roughly predict a growth of soccer fans alongside a simultaneous decline in those following American football. This isn't to necessarily say the market cap of American football will fall, rather its market share may decline as soccer turns its growing participation levels into team support and ultimately increased revenue. We're already seeing this growth play out as the MLS recently grew to **30 franchises**. It's also possible that recent **findings** about the risks associated with contact sport could explain declines in the popularity of playing sports such as American football, hockey, and rugby.

Clearly, sports fans that have never played the sport are plentiful, and will continue to be so. But, brands should be taking note and exploring how sports participation is evolving in markets they operate in. One such example comes from Scotland where **lacrosse**, a team game once considered the preserve of a handful of private schools, is becoming the country's fastest growing sport.




GWI Sports Q4 2020 3,256 U.S. consumers interested in sports aged 16-64

*Please note this list excludes some sports (e.g. swimming) as they are not tracked in the corresponding "sports played by children" question

05

# Women in sports: **level the field**

## The untapped opportunity in women’s sports

Despite the pandemic’s hit on the sports industry, women’s sports continues to gather momentum. To put this into perspective, prior to the outbreak the **reach** of FIFA Women’s World Cup more than doubled between 2015 and 2019, reaching over 17 million viewers.

But more importantly, when sports eventually resumed during the pandemic, the growth didn’t really stop and it has been noticeable beyond football. In the U.S. the WNBA (Women’s National Basketball Association), for example, saw a 68% **increase** in average regular-season viewership across all networks at a time when other leagues were struggling with engagement. And to top it all off, in the UK the Women’s Super League **marked** a huge milestone for the industry by signing a multimillion pound deal with BBC TV, giving the competition unprecedented exposure.

The size of the fanbase is also evident in our data, with 6 in 10 sports fans watching or following at least one of the 30 women’s sports leagues and competitions we track. Comparing fan engagement between male leagues and their female equivalents across key sports is quite telling too. It shows us that the gap between male and female leagues isn’t actually as big as it might be expected taking into account two major factors: 1) women’s leagues are considerably newer in their development in comparison to men’s; 2) the investment and media coverage devoted to women’s competitions is still only a fraction of men’s.

And although female leagues in basketball and rugby appear to be lagging behind on a global level, they do enjoy considerable popularity in certain parts of the world. For example, nearly a quarter of sports fans watch the WNBA in the Philippines and India, and over a fifth watch female rugby leagues in India and France. With 36% of male fans following women’s football, men’s engagement with female competitions shouldn’t be underestimated either.

6 in 10 sports fans watch or follow women’s sports leagues

# 36% of male fans follow or watch women's football

## The potential of women's sports

% of sports fans watching male/female leagues of the following sports


GWI Sports Q4 2020 | 9,763 sports fans aged 16-64



The data in this chart is based on the following leagues in each sport

| Sport | Male leagues | Female leagues |
|---|---|---|
| | AFC Asian Cup | AFC Women's Asian Cup |
| | FIFA World Cup | FIFA Women's World Cup |
| | UEFA Champions League | UEFA Women's Champions League |
| | UEFA Euros/European Championship | UEFA Women's Euros/European Championship |
| | African Cup of Nations | African Women Cup of Nations |
| | CONCACAF Gold Cup | CONCACAF Women's Gold Cup |
| | Copa America | Copa America Femenina |
| | NBA (National Basketball Association) | Women's National Basketball Association (WNBA) |
| | ICC World Cup | ICC Women's World Cup |
| | ICC World Twenty20 | ICC Women's World Twenty20 |
| | Indian Premier League (IPL) | Women Indian Premier League (WIPL) |
| | International One Day Cricket | Women's One Day International |
| | International Test Match Cricket | Women's International Test Match Cricket |
| | The Ashes | The Women's Ashes |
| | Twenty20 Big Bash | Women's Big Bash League (WBBL) |
| | 6 Nations | Women's 6 Nations |
| | European Rugby Champions Cup | Women's European Championship |
| | NRL (Australian Club League) | Women's NRL |
| | Premiership Rugby (English Club League) | Women's Premiership Rugby |
| | Rugby World Cup | Women's Rugby World Cup |
| | Rugby X | Women Rugby X |
| | World Rugby Sevens | Women Rugby Seven's |
| | Rugby Championship | National Women's Rugby Championship |

## The value in supporting social progress

The success of women's sports so far, given all the roadblocks, is a testament to how much potential there is to be unlocked. This is really good news for brands looking to invest in this market. On the one hand, they get better value from being able to form partnerships easier and reach a growing audience with less funds. On the other hand, and perhaps more importantly, sponsoring women's sports means brands can contribute to change in society by supporting gender parity, which ultimately helps them establish a positive image.

Visa's efforts to advocate for equality and diversity in sports via its **partnership** with UEFA Women's Football is one powerful example of purpose-driven sponsorship in sports. As we found in our Connecting the dots **report**, brand purpose and social responsibility are absolutely essential today. Our GWI Zeitgeist research also shows that issues of gender equality are high on the agenda, with around a third of U.S. consumers saying the pandemic has negatively impacted this.

Sponsoring female competitions or teams isn't the only way brands can gain exposure in this space. With 3 in 10 sports fans following a female athlete or team on social media, influencer marketing partnerships via these channels can prove fruitful engagement touchpoints too. Connecting with athletes who embody a strong sense of purpose can be especially powerful, as demonstrated by Nike's latest motherhood **campaign** featuring Serena Wiliams, Alex Morgan, and Nia Ali.

8 in 10 U.S. consumers think brands should address the issue of gender inequality

## Bringing female fans home

With 7 in 10 female sports fans watching or following women leagues, earning them as customers is another reason why brands should consider investing in women's sports. As a traditionally male-dominated space, women are rarely given enough credit as sports fans. They're also more likely than men to think sport doesn't value its fans enough (15% vs 12%). Our research shows that getting them on your side, however, can be very rewarding.

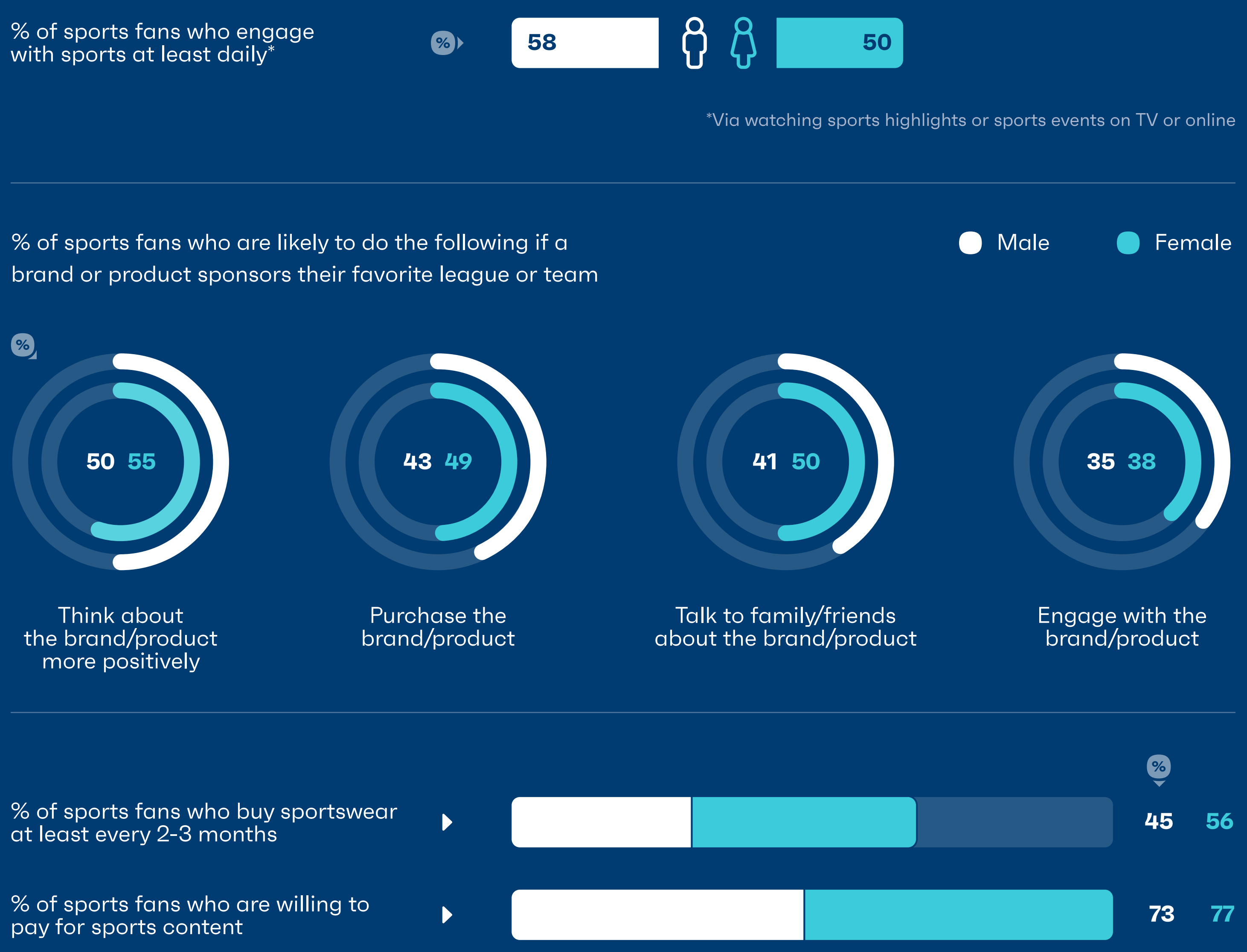
Generally speaking, female fans are more casual in the way they engage with sports, in the sense that they're less likely than men to watch highlights or other content on a daily basis. However, that doesn't mean that they're not devoted fans. In fact, they're much more likely than male fans to act on the back of sponsorship in multiple ways, especially when it comes to shouting out about brands to friends and family. Simply put, our data shows that bringing female fans on board means your brand will have a better chance of pushing them through every step of the brand journey – from engaging with your product, to buying it, and advocating for it after. Engaging with women through sports doesn't have to just be a values-based decision; it can be a revenue-based one as well.

Sportswear and athleisure brands need to pay particular attention. Female fans are not only more likely than their male counterparts to purchase sportswear every 2-3 months (56% vs. 45%), but they're also more likely to be in the high-income bracket (41% vs. 33%) – speaking to their strong spending power.

Female sports fans are 41% more likely than the average fan to be fashion-conscious

## Less frequent viewers but more devoted fans

18




GWI Sports Q4 2020

9,763 sports fans aged 16-64

06

# Putting the E in sports

## Esports: the digital alternative for traditional sports

While it started out as a niche interest, esports quickly became a fully-fledged industry, expected to reach **$1.1 billion** by the end of this year. Its growth is noticeable, especially among younger audiences. 18% of 16-24s reported spending more time on esports in July, making it a popular lockdown pastime. Further catalyzing esports' progress were lockdown conditions of the pandemic, which inevitably pushed sports further into digital areas. As a result, many businesses and sports organizations dipped their toes into esports for the first time. Growth in **ad revenues** naturally followed for both endemic and non-endemic brands. Esports essentially became a promising digital alternative for traditional sports when live events were canceled. It allowed sports organizations to continue engaging with fans, appeal to new audiences, and potentially alleviate some of the losses. Formula 1 was one of the first to embark on the virtual fan **experience** back in July, which proved to be a success; it was followed by a multi-year **partnership** with Zoom. This is not only a strong validation of virtual events in sports, but it also shows that the lines between traditional sports, athletes, and esports are becoming ever more blurred.

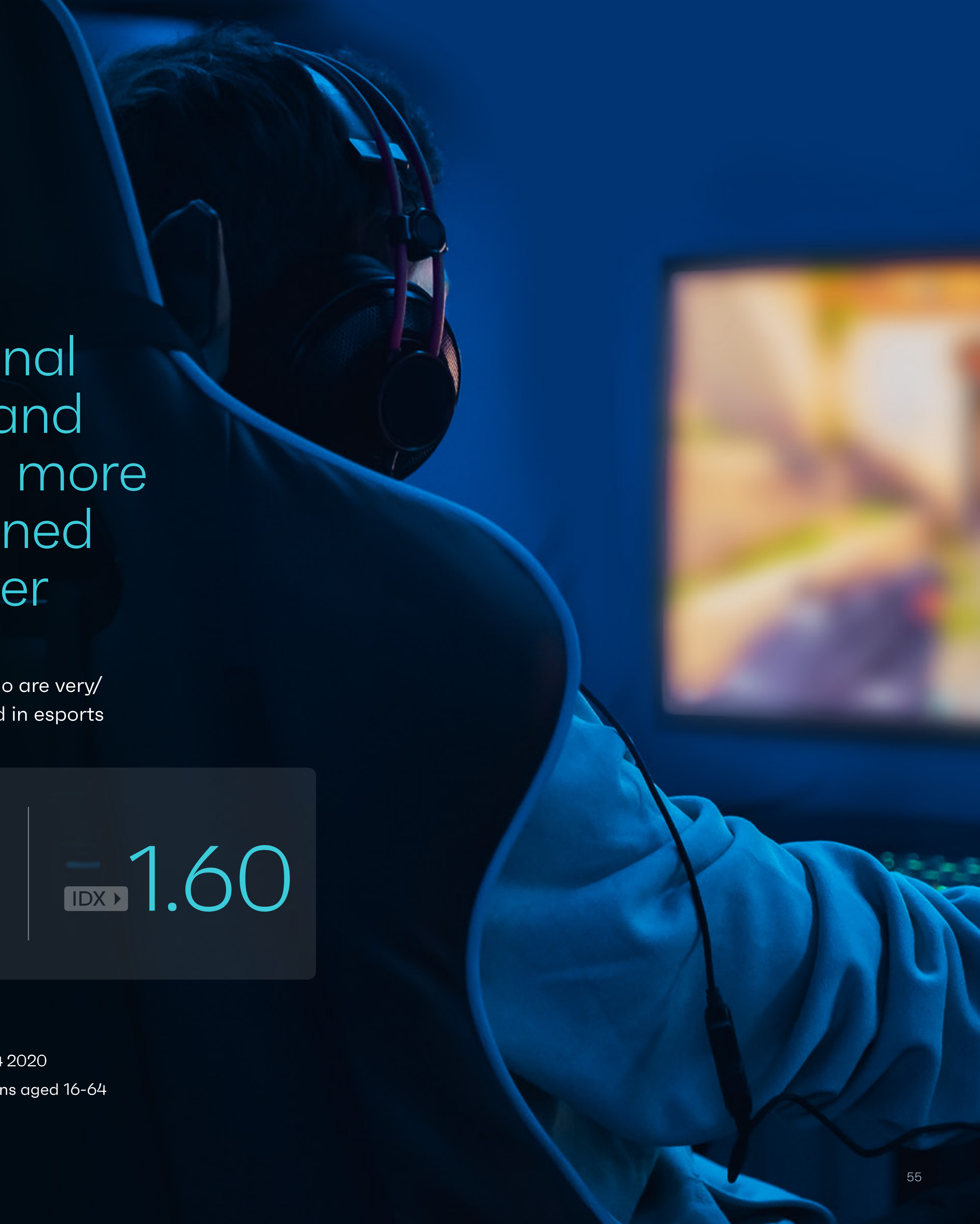
19

## Traditional sports and esports more intertwined than ever

% of sports fans who are very/ extremely interested in esports

% 57 | IDX 1.60

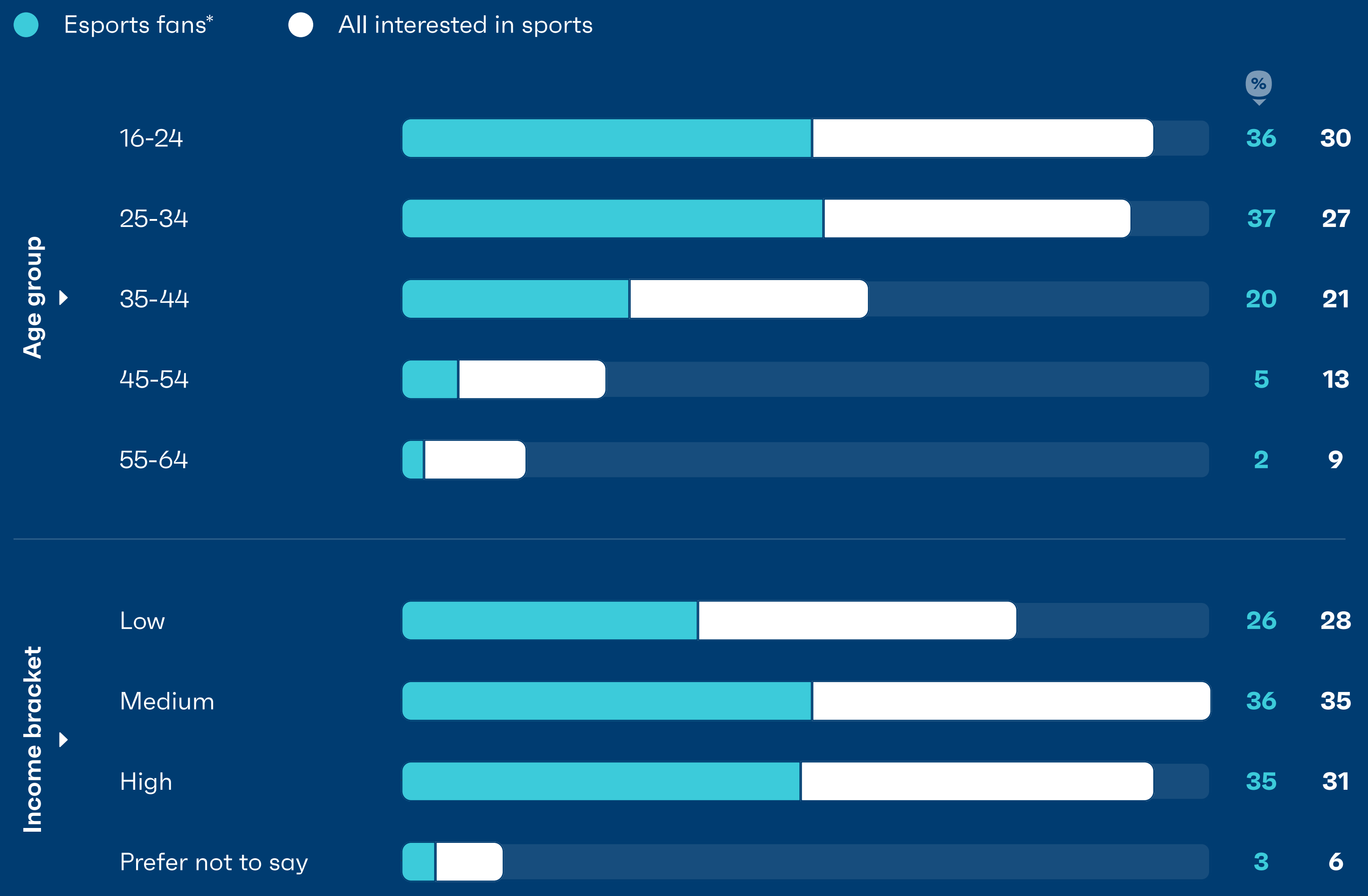
GWI Sports Q4 2020
9,763 sports fans aged 16-64



## Opportunity to attract a young and affluent fanbase

% who fall into the following age and income groups

20




GWI Sports Q4 2020   4,215 esports fans and 23,073 consumers interested in sports aged 16-64

*Esports fans are defined as those who are extremely/very interested in esports and watch esports at least once a week

# Sports fans are 51% more likely to say they first got interested in esports by a promotion/ partnership by a brand

Subsequently, fandom has increased. According to our data, just under 6 in 10 sports fans today are extremely or very interested in esports, meaning that those not investing in the market are missing out on a huge opportunity. Just jumping on the bandwagon and simply showing off your logo as we normally see with traditional sports won't cut it; the challenge of effectively activating sponsorships remains.

As we can see from the data, esports fans skew young and affluent, meaning they're not your average sports fans. Capturing their attention and earning their loyalty is harder, and brands need to go the extra mile by bringing interactive experiences. One brand excelling in this space is Burger King. Whether through its NBA "**Menu Court**" or FIFA "**free-eats challenge**", the fast food chain makes sure fans are entertained above all else.

Want to see where gaming and sports overlap? **We now offer a data set all about gaming**

# Hear it first-hand: How Formula 1's latest digital initiatives have allowed it to maintain momentum and engage new audiences despite the pandemic


by

**JULIAN TAN**

PH.D - HEAD OF DIGITAL BUSINESS INITIATIVES & ESPORTS AT FORMULA 1

and

**ZARAH AL-KUDCY**

HEAD OF COMMERCIAL PARTNERSHIP DEVELOPMENT AT FORMULA 1


*Despite the setbacks of 2020, Formula 1 has continued to embrace the latest in digital innovations, providing additional touchpoints for fans through its esports series and a new virtual hospitality offering for its partners to access and engage with the sport.*

Esports has been a core part of F1's digital strategy since 2017 to attract tomorrow's fans to the sport through an immersive and engaging channel that more and more of our future fans are spending their time and attention on. We've found that esports is gradually becoming a core way in which younger fans discover F1, with one-third of Gen Z and Gen Alpha converting into real life F1 fans from our esports coverage. On top of this, esports provides the participatory element that F1 otherwise lacks compared to other sports such as football or tennis. Looking to the future, its continued success and development is aiming to lower the barrier of entry into the sport and provide greater accessibility into the world for Formula 1.

If we had to share any advice for brands looking to start developing the esports side of their business, it would be **speed over accuracy**. Like any digital product, you want to go to market quickly and apply a test and learn approach for what works and what doesn't. Another important aspect to be cognizant of is that esports isn't a monolithic industry – each game title has its unique nuances, and your strategy should be specific to the product positioning and potential.

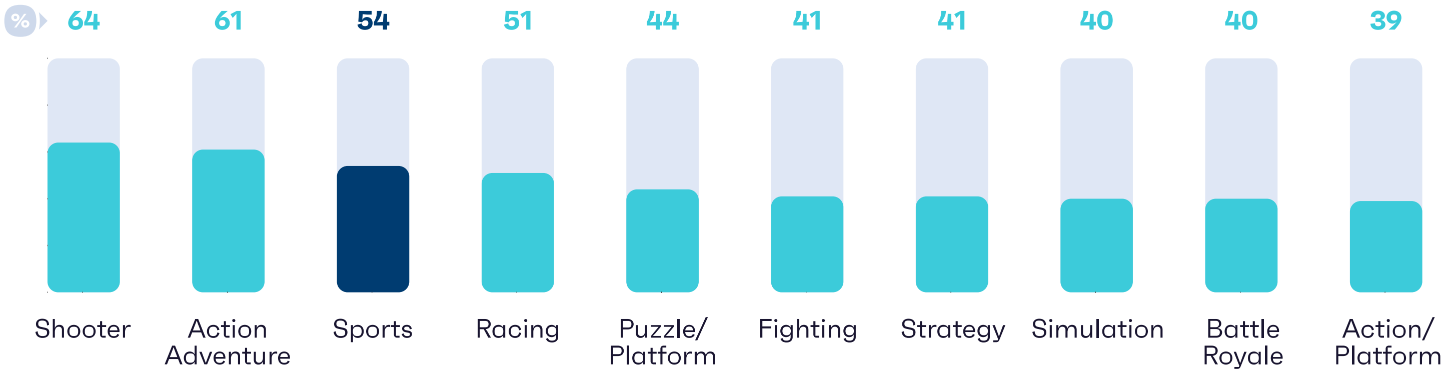
Complementing F1's esports activities, something that really helped us maintain momentum and energy in the absence of physical racing was the Virtual Paddock Club in 2020. The subsequent partnership with Zoom also allowed both Zoom and the F1 to maintain B2B opportunities around live-sport in the absence of physical hospitality. In the first partnership of its kind last year, it offered a bespoke, behind the scenes, intimate experience, ultimately providing new business opportunities for F1 and its partners.

The partnership rationale is built on F1's innovation credentials and traditional strength and appeal with technology brands, while also collaborating with an extremely current, 'zeitgeist' brand. It's a win-win. By partnering with us, Zoom can showcase its product offering and demonstrate that it's additive to the overall F1 experience. The fact that the Virtual Paddock Club is remaining alongside traditional hospitality post-COVID is a testament that this can all work regardless of the COVID-19 restrictions. The success of the Virtual Paddock Club has led to a longer-term renewal which will also see Zoom's services integrated into and showcased throughout F1's business, F1 in Schools, and fan engagement opportunities.

## Sports fans more likely to be playing shooter and action games

21

% of sports fans who have played these gaming genres in the past 12 months




GWI Sports Q4 2020 | 9,763 sports fans aged 16-64

## Branching out beyond sports simulation

The sports simulation genre of gaming may provide the most straightforward path for sports teams and organizations to enter the esports world. But by staying in their comfort zone, they risk missing out on the big bucks. If we look at esports **tiers** which rank games based on different criteria like viewership, we can see the first two tiers are primarily occupied by titles like *League of Legends* and *Fortnite*.

Our data also shows that even among sports fans, sports isn't the most popular gaming genre they play. Although 54% say they have played sports games in the last year, genres like shooter (64%) and action adventure (61%) remain more popular among this audience. This is especially true for certain regions. For example, the FIFA Interactive World Cup is most popular among sports fans in Europe (15%) and LATAM (30%), while across APAC and North America, it's leagues like Call of Duty League (16%) and PUBG Global Championship (32%) that are top contenders, respectively.

This isn't to say that sports teams shouldn't be involved in their own genre; but it's vital they consider expanding beyond sports simulation to capture the full potential of the esports audience. The esports industry is quickly getting crowded, so finding a niche is key. We've already seen a few teams like FC Barcelona and PSG branch out to *League of Legends* in addition to their PES (Pro Evolution Soccer) and FIFA teams. With the latest **partnership** between Epic Games (the company behind *Fortnite*) and 23 football clubs from around the world, it's safe to say that in football, this isn't an exception anymore. Other sports and teams are sure to follow.

If you want to know more about how to reach the esports audience, **check out our Gaming Playbook.**

# Appendix

1 Which of these best describe your gender? • Which of these sporting events/competitions do you follow, watch or have any interest in?

2 How often do you watch professional sports games/matches on TV? (More than once a day/daily/weekly) • How often do you watch professional sports games/matches online? (More than once a day/daily/weekly) • In which ways do you follow/keep up with sports? (Follow professional sports through newspapers/magazines | Listen to sports radio/podcasts)

3 During the Covid-19 pandemic lockdown, which of the below activities did you miss the most? (Going to sporting events) • Has COVID-19 made you more or less likely to want to attend live events (e.g. sports matches, concerts, etc) in the future?

4 Which of these sports/sporting activities do you regularly follow/watch online/on broadcast TV?

5 Who do you typically watch sports games/matches/coverage with?

6 In which place(s) do you typically watch sports games, matches, or coverage?

7 Do you pay for a subscription to watch sports content? • Which of these services/channels do you use to watch sports?

8 Which type(s) of sponsorship do you tend to notice during sports games and events?

9 Would you support the Olympics potentially going ahead without fans from your country in the venues?

10 Which of these platforms do you use to follow sports (e.g. read articles/updates, watch coverage or clips, etc)?

11 Which of these have you done in the last month on YouTube/Facebook/Twitter?

12 How often do you watch professional sports games/matches on TV/online? (More than once a day/daily/weekly) | How often do you watch highlights/recaps about professional sports on TV/online? (More than once a day/daily/weekly

13 For which of these sports do you participate in fantasy leagues?

14 Which of the following do you feel describes you? • Typically, which of the following would you rather do? • Which of the following things are important to you? • Which of these statements do you agree with?

15 Who do you follow on social media?

16 Which of these sports do you watch, follow, or have an interest in? | Are any of these sports regularly played by your child(ren)?

17 The data in this chart is based on the following leagues in each sport

Which of these sporting events/competitions do you follow, watch or have any interest in?

18 If a brand or product sponsors your favorite sports league or team, which of these are you likely to do? • How frequently do you purchase sportswear? (At least every 2/3 months) • How willing are you to pay to access content from your favorite sports/leagues? (Very willing/willing)

19 How interested are you in esports? (Extremely/very interested)

20 Which of these age brackets do you fall into? | What is your yearly household income before tax or any other deductions?

21 Which of these gaming genres have you played in the last 12 months?

# Notes on methodology

## Introduction

Figures in this report are primarily drawn from GWI Sports online research among internet users, who are interested in sports or state that they watch, attend or participate in sports, aged 16-64. We also use our GWI Core dataset, which is fielded across 47 countries, and interviews over 688,000 respondents per year.

Please note that we only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

## Our research

In this research, GWI interviewed 23,073 fans aged 16-64 across 15 markets. Respondents complete an online questionnaire that asks them a wide range of questions about their lives, lifestyles and digital behaviors. We source these respondents in partnership with a number of industry-leading panel providers. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and no respondent can participate in our survey more than once a year (with the exception of internet users in Egypt, Saudi Arabia and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

## Our quotas

To ensure that our research is reflective of the online population in each market, we set appropriate quotas on age, gender and education – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources.

This research is also used to calculate the "weight" of each respondent; that is, approximately how many people (of the same gender, age and educational attainment) are represented by their responses.

## Sample size by market

This report draws insights from GWI Sports Q4 2020 wave of research across 15 countries, with a global sample of 23,073 respondents.

| | |
|---|---|
| Australia | 1,121 |
| Brazil | 1,104 |
| Canada | 1,461 |
| France | 1,224 |
| Germany | 1,430 |
| India | 1,884 |
| Indonesia | 1,545 |
| Italy | 1,683 |
| Japan | 1,397 |
| Mexico | 1,000 |
| Philippines | 1,037 |
| Spain | 1,863 |
| Thailand | 1,030 |
| UK | 2,038 |
| U.S. | 3,256 |

## Internet penetration rates: GWI versus ITU figures

As GWI's Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country's total population (reproduced above) with internet penetration forecasts for 16-64s specifically. Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

## Internet penetration rates across GWI's markets

GWI's research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan and Australia. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the lower the country's overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated. This is the case throughout much of LatAm, MEA and Asia Pacific.

## Internet Penetration Rates (GWI's Forecasts for 2020 based on 2018 ITU data)

Table here refers to the total population in each market

| | % |
|---|---|
| Australia | 89 |
| Brazil | 75 |
| Canada | 94 |
| France | 86 |
| Germany | 92 |
| India | 45 |
| Indonesia | 42 |
| Italy | 77 |
| Japan | 93 |
| Mexico | 71 |
| Philippines | 67 |
| Spain | 90 |
| Thailand | 59 |
| UK | 96 |
| U.S. | 90 |

This table provides GWI forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GWI conducts online research in.

# Want to join the game?

Representing over one billion fans, our new data set was made to fast-track you into the mind of the modern sports enthusiast.

**Get the ball rolling**

**45%**

**of sports fans would purchase a brand if it sponsors their favorite league or team**

GWI.