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2020

# The Best Seats In The House

## Recreating The Gameday Sports Experience At Home

# About VAB

VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.

## Simplify

We save you time by bringing you the latest data & actionable takeaways you can use to inform your marketing plans.

## Discover

We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

## Transform

We help you build your brand by focusing on core marketing principles that will help drive tangible business outcomes.



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# What You'll Learn...

- ▶ The key benefits to sports fans that make 'at home' their **most preferred viewing experience** and how these will be **further amplified** during a prolonged time of social distancing and limited, or no, in-person game attendance.
- ▶ The ability of sports to **engage fans of all demographics** that are hungry for more sports – males, females & multicultural
- ▶ The opportunities for **marketers to engage with viewers** during live sports programming and drive consumer action.

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# Sports Are Back!

Satisfying Fans' Thirst For Live Sporting Events

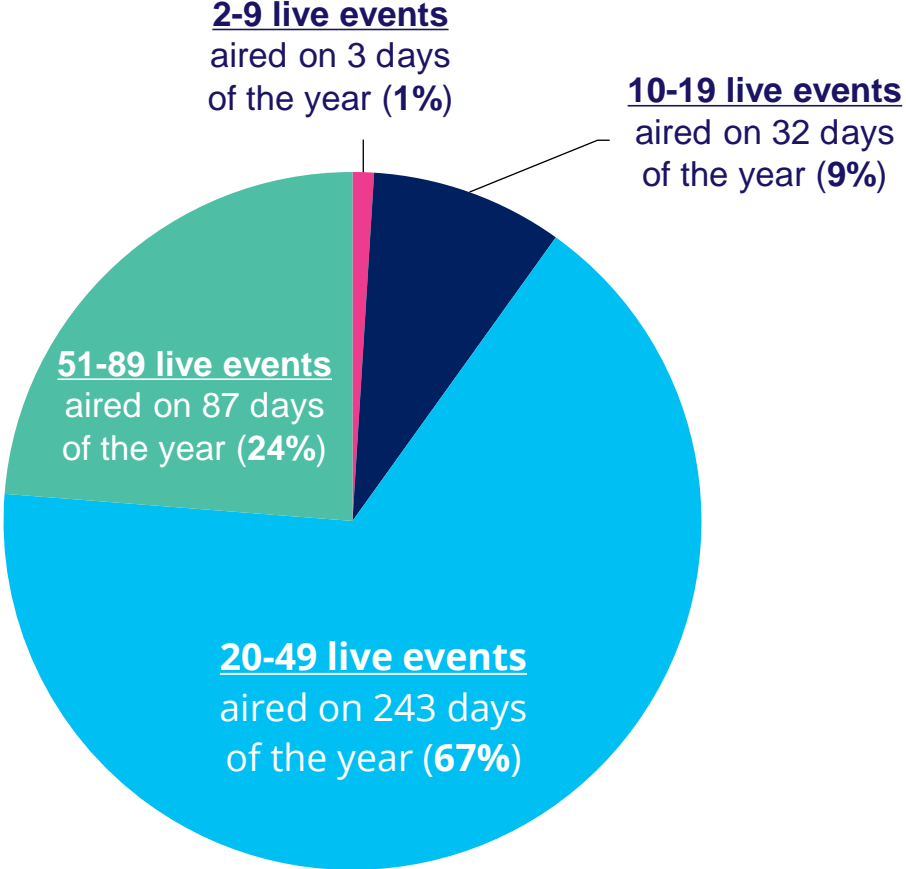


Although the second half of 2020 will simultaneously feature all the major leagues and many high-impact events, **the appetite for, and coverage of, sports has always been huge.**

Looking back at 2019 as our last 'normal' year in sports:

- ▶ Over 14,100 live sporting events aired across national TV platforms
- ▶ 330 days of the year featured at least 20 live games broadcast across these platforms

# of National Live TV Sporting Events Aired Daily  
CY 2019



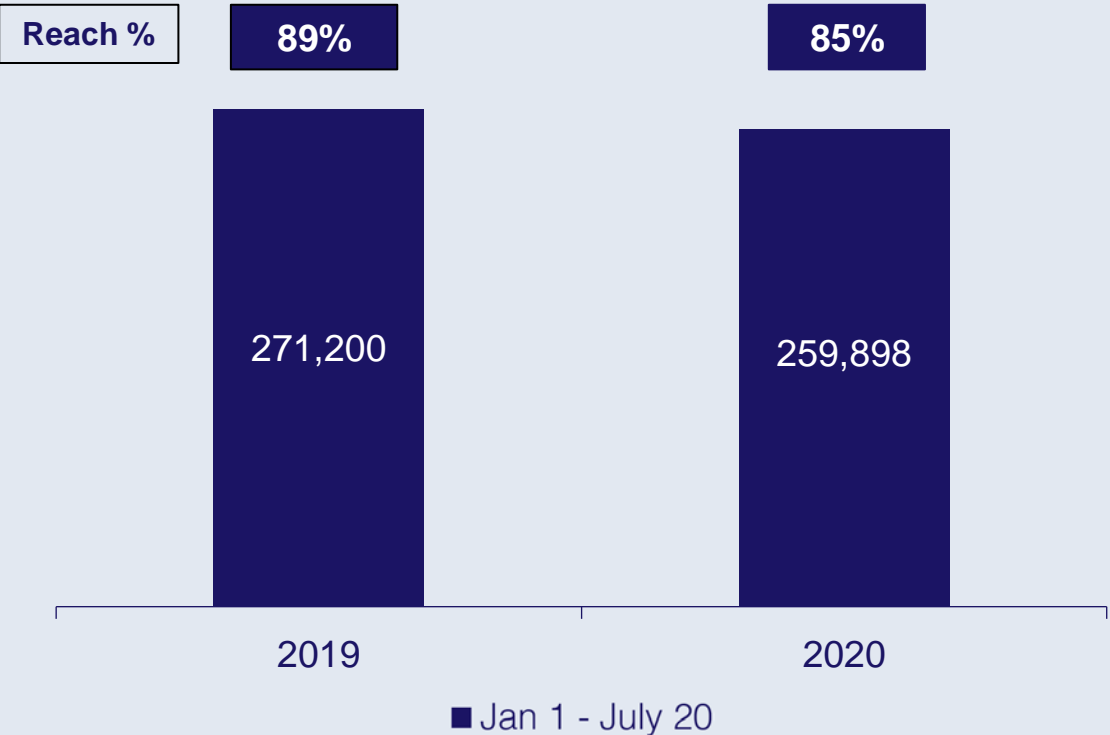
How to read: In 2019, 3 days featured between 2-9 live sporting events airing on national TV.

Source: VAB analysis of Nielsen NPower, Total Day, live originals/premieres only, January 1 – December 31, 2019; includes Spanish language networks; excludes regional sports networks, local broadcast airings and digital airings of sports through MVPD / network TV apps. MVPD subscriber costs based on VAB analysis of S&P Global Intelligence, The 2019 Sports Report.

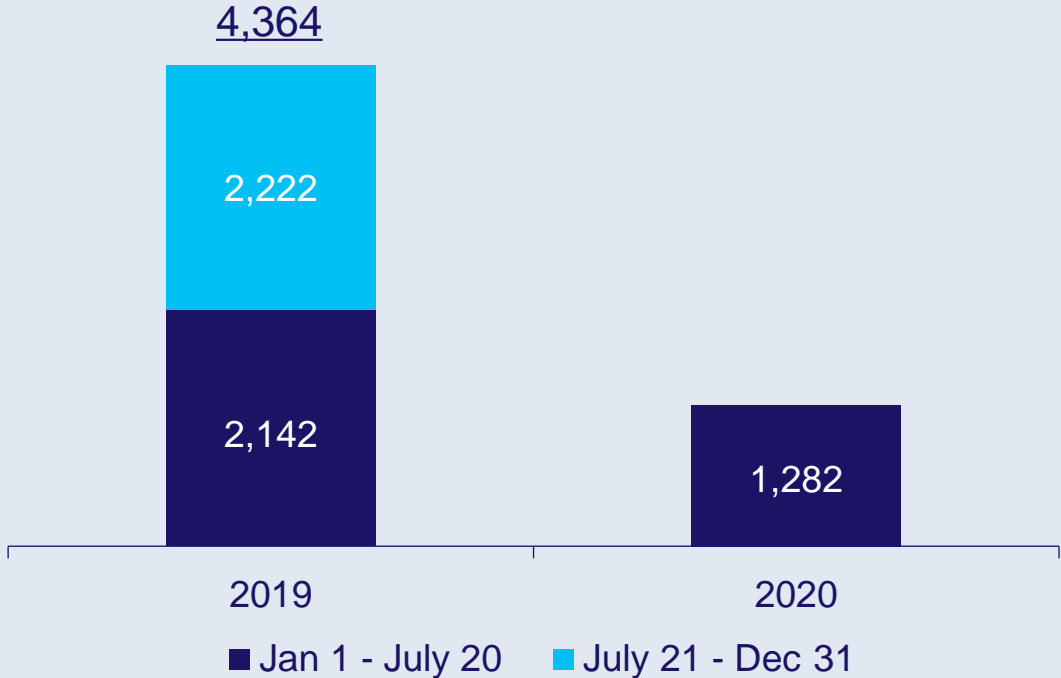
# Before the return of major sports, most fans watched what they could to satisfy their passion this year, but they are **hungry for much, much more**

▶ With only **30%** of 2019's average minutes watched so far in 2020, fans have the thirst and capacity for much more sports this year

**P2+ Reach (000) for National Live TV Sporting Events: YoY Comparison**



**P2+ National Live TV Sporting Events: Average Annual Minutes Viewed**



Source: VAB analysis based on data from Nielsen NPower R&F Program Report, Total Day, Live+7, P2+, ad-supported cable TV + broadcast TV, Jan 1 – July 20 of 2019 & 2020 & July 21 – Dec 31 2019; includes Spanish language networks; excludes regional sports networks, local broadcast airings and digital airings of sports through MVPD / network TV apps. Reflects live sporting events only.

# The 2<sup>nd</sup> half of 2020 will be very active between already planned sports and those that have re-tooled their schedules to play a modified season

- ▶ While the pandemic forced the MLB, NBA & NHL to restart their seasons in late July and early-August, premier sporting events like the French Open and Kentucky Derby were pushed to September and October, respectively

	August 2020					September 2020				October 2020				November 2020					December 2020				January 2021					February 2021				March 2021					April 2021				May 2021				June 2021				July 2021			
	W1	W2	W3	W4	W5	W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3	W4	W5	W1	W2	W3	W4	W1	W2	W3	W4	W5	W1	W2	W3	W4	W5	W1	W2	W3	W4	W5	W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3
<b>Major Sports:</b>																																																				
<b>Active Weeks</b>																																																				
NFL						Regular Season										Playoffs												Super Bowl												Draft												
MLB	Regular Season										Postseason																		Spring Training				Regular Season																			
NBA	Playoff Series																				Regular Season										Playoffs				Draft																	
NHL	Stanley Cup Playoffs																																																			
NCAA Football											Regular Season										Bowl Games																															
NCAA Basketball																					Regular Season										March Madness																					
Golf	PGA Tour					US Open				Ryder Cup				PGA Tour				Masters				PGA Tour				PGA Tour																										
Soccer	Champions League				MLS				MLS & Premier League																																											
NASCAR	Nascar Cup Series																														Nascar Cup Series																					
Tennis	ATP				US Open				French Open				ATP Tour														Australian Open				ATP Tour										Wimbledon											
Horse Racing						Kentucky Derby				Preakness Stakes																										Belmont Stakes																

Magenta = reflects sports seasons / sporting events that were shifted to new dates, and being held outside of their normal season, due to pandemic-related postponements.

Note: Dates subject to change, not all schedules are finalized

# Already, the return of sports over the summer is helping to quench the thirst of fans as **viewership and ratings** across sports **break records**



**MLB opener was most-viewed regular-season game since 2011**



**NBA Returns to Strong Ratings on TNT**



**ESPN's average WNBA opening weekend viewership up 63 percent over 2019 season**



**MLS is Back Tournament Opener Delivers Second Highest MLS Regular Season Audience on ESPN in Three Seasons**



**Television Ratings Unsurprisingly Skyrocket as NBA and MLB Return**



**PGA Tour at Colonial hits 16-year final round high**



**Bruins-Flyers round-robin opener delivers strong ratings for NBC**



**The Match: Champions for Charity delivers record TV rating**



**NBC Draws Strong Ratings For Busy Racing Weekend**



**Ratings Roundup: WNBA on ESPN Earns Most-Watched Opener in Eight Years; CBS Sees Highest-Rated NWSL Match in History**



**Report: UFC 251 brings in 1.3M PPV buys, one of the most in the sport's history**



**UFC 251 prelims finish at No. 1 in Saturday cable ratings**

## Summary: **Sports Are Back!**

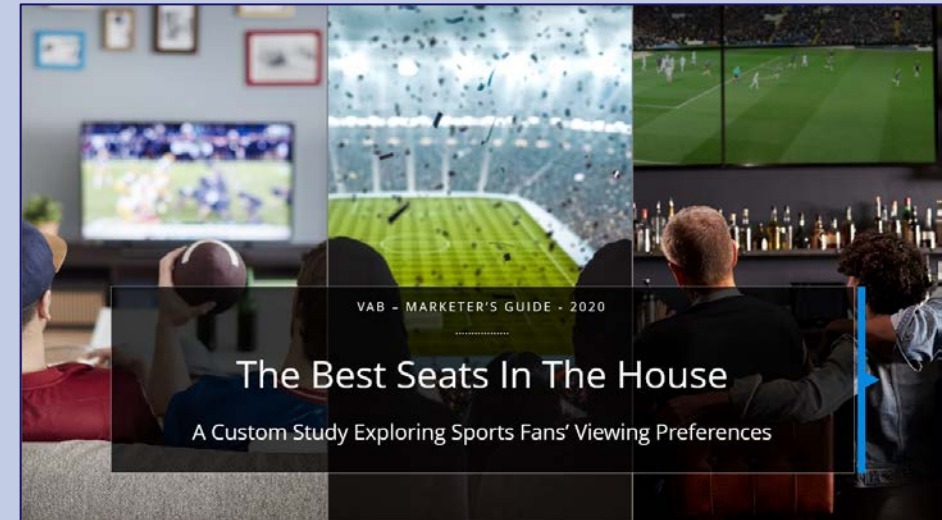
- ▶ **The viewers' appetite, and television coverage of, sports has always been very huge so, due to the pandemic-related postponement of most sports, fans are hungry to re-embrace their passion as their favorite leagues return to action**
- ▶ **Between the already planned sports seasons and several other major leagues playing outside of their typical schedule dates, marketers will have even more opportunities to connect and engage with consumers through live sports programming within the second half of the 2020**
- ▶ **Viewers have shown their excitement for the return of sports as events across leagues have been breaking viewership records over the summer**

# Reintroducing our custom study from earlier this year with a **focus on the key insights and behaviors** that are sure to be even more important during this **time of social distancing and limited, or no, game attendance**

In January 2020, we released our marketer's guide, '*The Best Seats In The House*,' to help marketers understand the passion of today's sports fan and the motivating factors behind their preferences for live sports viewing, particularly at-home viewing vs. in-person event attendance.

To do this, VAB commissioned *Dynata* to conduct the 'Sports Viewing Experience' Survey fielded online in September 2019. The results are based on 1,023 adult 18+ U.S. respondents who identified themselves as a sports fan (either casual, moderate or avid).

For this re-release, we're focusing on the key roles that at-home viewing plays in the sports fans' life so marketers can understand their behaviors which are sure to be amplified for the near future.



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# The Real 'Home Field Advantage'

A Front Row Seat To All Live Sports



# Although sports are back, the stadium experience **looks very different**

- ▶ Social distancing has led sports leagues to use cut-out fans, 'virtual' fans for TV broadcasts and **pumped in crowd noise** to re-create the missing elements from not having fans in attendance



- ▶ No in-stadium attendance for fans
- ▶ Crowd noise pumped in
- ▶ Two-city\* 'bubble' to keep players and staff isolated



- ▶ No in-stadium attendance for fans
- ▶ Cut-outs of real fans in the stands
- ▶ Crowd noise artificially created



- ▶ No in-stadium attendance for fans
- ▶ Virtual fans via screens & crowd noise
- ▶ 'Bubble' in Orlando to keep players and staff isolated



- ▶ Limited in-person fan attendance
- ▶ Social distancing and masks required
- ▶ Some venues have banned tailgating



\*NHL 'Bubble' cities are Edmonton & Toronto

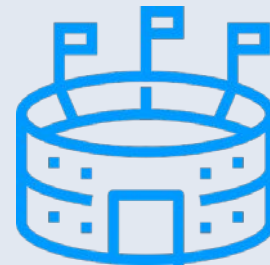
# But even before social distancing prohibited people from attending games, **most fans preferred to watch sports at home anyways**

## Where Do Sports Fans *Prefer* To Watch Sports? All Sports Fans



Home

**72%**



Stadium  
or Arena

**19%**



Out-Of-Home  
(Bar/Restaurant, Someone Else's  
Home or Elsewhere)

**8%**




Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+, Q11: When thinking about the overall sports viewing experience, where do you prefer to watch sports? All Sports Fans based on P18+, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc. Note: Numbers don't add to 100% due to respondents ability to select more than one answer.

# Almost all sports fans regardless of their level of fandom, age, gender or ethnicity prefer to watch live sports at home

In 'normal' times, avid fans, adults 18-34 and females are more likely than others to prefer the experience and gameday atmosphere that attending a game in-person provides.

Casual sports fans, younger demos and multicultural fans are more likely than others to prefer watching 'out-of-home' as part of social gatherings.

## Where Do Sports Fans *Prefer* To Watch Sports?

			
<u>Sports Fan Type</u>	<u>Home</u>	<u>Stadium or Arena</u>	<u>Out-Of-Home</u> (Bar/Restaurant, Someone Else's Home or Elsewhere)
<b>All</b>	<b>72%</b>	<b>19%</b>	<b>8%</b>
<b>Avid</b>	<b>71%</b>	<b>22%</b>	<b>8%</b>
<b>Moderate</b>	<b>75%</b>	<b>19%</b>	<b>6%</b>
<b>Casual</b>	<b>70%</b>	<b>16%</b>	<b>14%</b>
<b>Female</b>	<b>70%</b>	<b>22%</b>	<b>7%</b>
<b>Male</b>	<b>74%</b>	<b>18%</b>	<b>9%</b>
<b>Black</b>	<b>65%</b>	<b>17%</b>	<b>19%</b>
<b>Hispanic</b>	<b>67%</b>	<b>18%</b>	<b>14%</b>
<b>P18-34</b>	<b>66%</b>	<b>23%</b>	<b>11%</b>
<b>P35+</b>	<b>76%</b>	<b>18%</b>	<b>9%</b>

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base: self-identified sports fans, P18+. Q10: Where do you typically watch sports? All Sports Fans based on P18+, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), Moderate Fans Respondents (watch sports on TV a few times a week, routinely follow team / player news, etc), Casual Fans Respondents (occasionally watch sports on TV, stay up to date on major sports news, etc). Note: Numbers don't add to 100% due to respondents ability to select more than one answer.

# In our original custom study, we identified what fans said were the **best and worst aspects** of attending sporting events in person

## Favorite Reasons To Go To A Sporting Event

- ▶ I enjoy the gameday atmosphere and making 'a day of it' by tailgating or going to area bars
- ▶ I like spending time with family and friends
- ▶ I appreciate the camaraderie and community with other fans
- ▶ I like to show team pride and support my favorite team
- ▶ I like the ability to see everything happening on the field

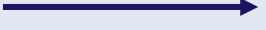
## Reasons That Would Keep You From Attending A Sporting Event

- ▶ Too expensive (tickets, concessions, parking, etc)
- ▶ Too much traffic
- ▶ Stadium / arena is too far away
- ▶ Unpredictable weather
- ▶ Long lines for entry, concessions, bathrooms
- ▶ Seats are usually too far away from the field / court

# Although fans already greatly prefer ‘at-home’ viewing to anything else, those that won’t be able to attend games this season will **easily replicate the gameday experience at home**, without the hassles of going to the game

## Favorite Reasons To Go To A Sporting Event


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## How Fans Recreate The Experience At Home


- ▶ Cooking / grilling in the backyard / ordering in pizza, wings and beer
- ▶ Hosting gatherings with their close circle of friends and family
- ▶ Engaging with ‘shared interest’ communities through online forums and social media platforms
- ▶ Playing festive music, wearing the team colors and apparel and sitting in their lucky seat
- ▶ What’s a better view than having a front row seat from your couch for every game? Not to mention the available pre-to-post-game coverage on TV?

# Brands are even helping fans re-create the gameday atmosphere at home with food, fun, games and authentic tailgate experiences




**Stadium In A Box**

Heineken is bringing the stadium to the fans with their “Stadium in a Box” to promote their zero-alcohol Heineken 0.0. The contest winners receive an official stadium seat, branded with their team’s logo and a mini-fridge.




**Homegate**


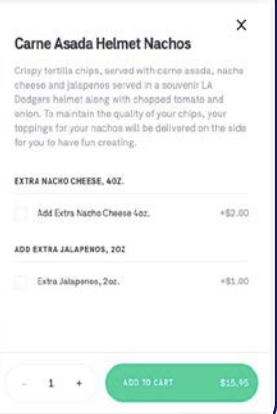
Pepsi’s ‘Homegate’ sweepstakes is bringing the tailgate to fans’ houses. Winners won’t be missing the parking lots with the 16 sq-foot tailgating box that includes an outdoor projector, custom corn hole sets and Pepsi. The brand even recreated a stadium parking lot tailgate experience for one lucky NY Jets fan complete with grill and painted end zone.

**Dodger Home Plates**

**Postmates**

The LA Dodgers partnered with Postmates to bring dishes from Dodger Stadium to fans’ homes. Postmates is offering delivery of “Dodgers Home Plates” in LA with fans’ in-stadium favorites including premium Dodger Dogs, Dodgers’ blue gelato and the team’s carne asada helmet nachos.

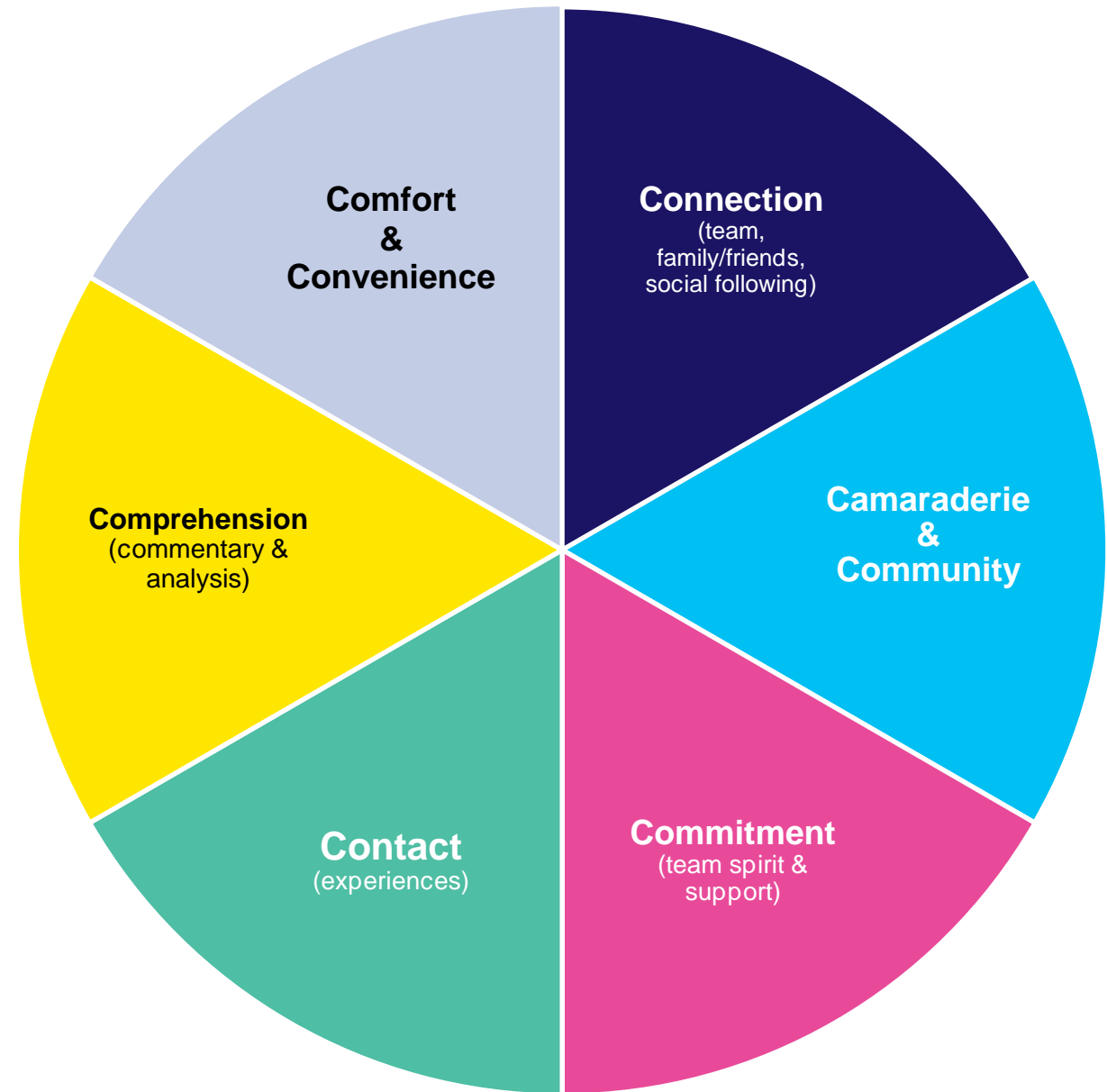

**Stadium Ketchup Kits**

Heinz created 200 “Stadium Ketchup Kits” to help bring a bit of the ballpark home. The stadium-sized dispenser comes filled with ketchup, alongside a coupon for a free pack of Oscar Mayer hot dogs and a foam finger so fans’ can cheer on their teams from home.



Through their fan passion and ability to be social around shared interests, either with a close group of family and friends or through multiscreen platforms, at-home sports viewing satisfies **six essential human need states**.

The fulfillment of these need states is more important than ever considering the extended lockdowns, physical isolation and uncertainties that the country has recently endured.



**Comfort & convenience** are the top needs fulfilled by watching sports at home which is driven by the superior viewing experience that exists






**92%** of all sports fans enjoy home viewing because TV provides them a **front row seat** to any game they want to watch

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q12: Please rate how important the following are in your decision to watch sports at home (Top 2 Box: Somewhat Important & Very Important).

# Most fans, especially multicultural fans, have bought a bigger TV screen just so they can have a better viewing experience for sports at home

▶ With that said, multicultural audiences are also more likely to watch sports across smaller screens as well, like mobile devices

## % of Sports Fans Who Agree

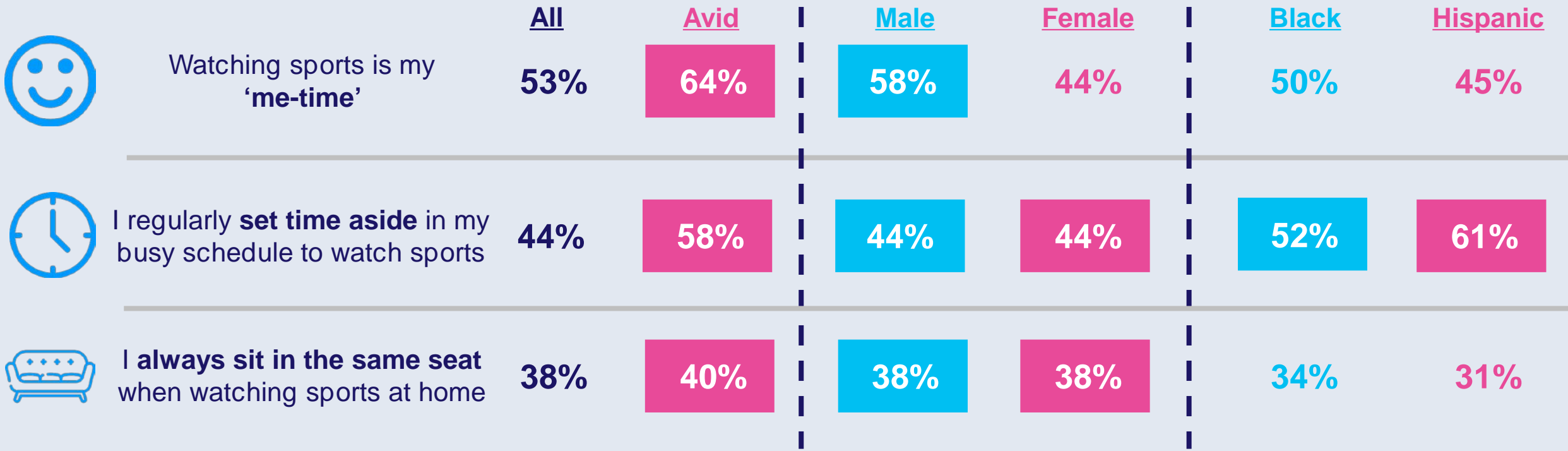
	<u>All</u>	<u>Avid</u>	<u>Male</u>	<u>Female</u>	<u>Black</u>	<u>Hispanic</u>
 <p>I bought a <b>bigger TV</b> screen just so I could have a better viewing experience for sports</p>	<b>63%</b>	<b>76%</b>	<b>66%</b>	<b>59%</b>	<b>68%</b>	<b>76%</b>
 <p>I watch sports on a <b>high definition</b> TV so I can see the action clearer</p>	<b>60%</b>	<b>66%</b>	<b>60%</b>	<b>61%</b>	<b>52%</b>	<b>61%</b>
 <p>Whenever possible I watch sports on the <b>largest screen</b> available in my home</p>	<b>48%</b>	<b>54%</b>	<b>49%</b>	<b>47%</b>	<b>41%</b>	<b>46%</b>

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q17: Please rate how much you agree or disagree with the following statement (Top 2 Box: Somewhat Agree & Strongly Agree), Q20: Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), All Sports Fans based on P18+.

# There's a comfort to watching sports at home as almost **two-thirds** of avid fans and over half of males consider it their 'me-time'

▶ While multicultural audiences are more likely to set aside time to watch sports, they are less likely to consider it 'me-time' as they think of sports as more of a communal experience

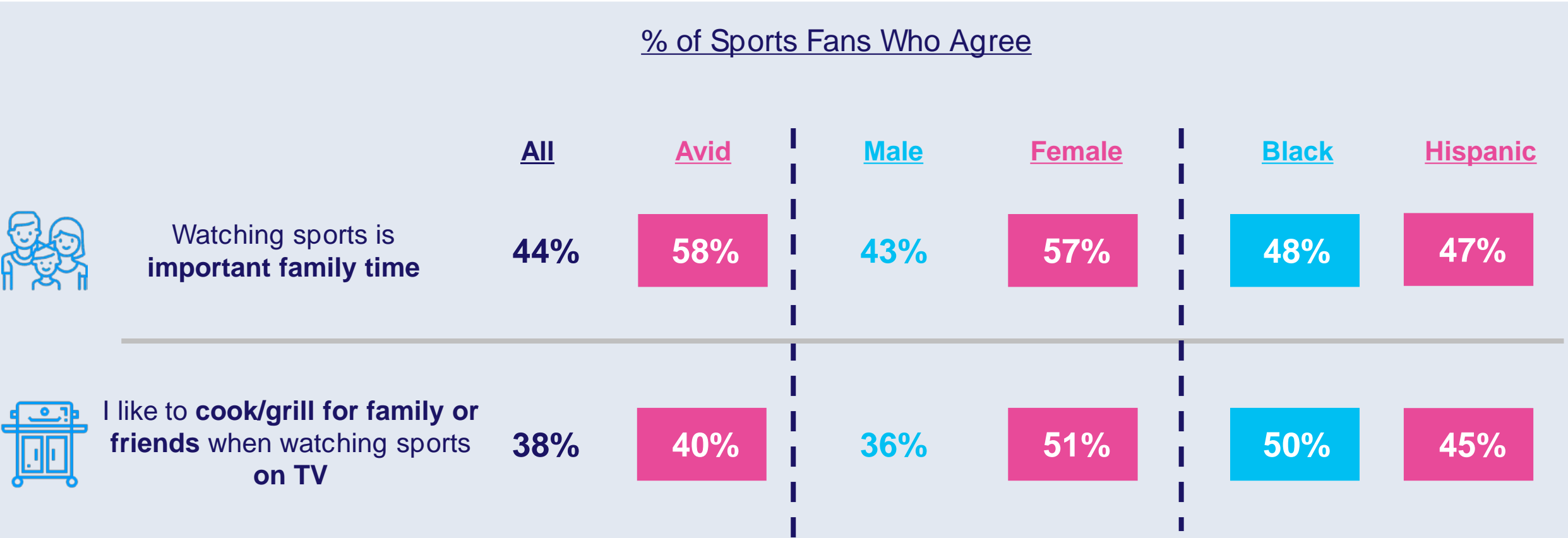
% of Sports Fans Who Agree



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18 & Q19: Which of the following statements do you believe are true for you?, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

# Live sports also creates **valuable occasions to bring people together**, and a majority of female fans think of sports as an important family activity

► This bonding time leads many to make the occasion even more of an event by cooking or grilling for their guests



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18 & Q19: Which of the following statements do you believe are true for you?, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

# Social media enhances the sports viewing experience at home and keeps fans more engaged with games, especially among multicultural fans

- ▶ Social media is an even more important platform today since it allows fans to follow, and have conversations within, shared-interest communities (virtual 'bars' or 'tailgates') during a time of continued physical distancing practices



*“Following social media posts keeps me more actively engaged in watching live sports on TV”*  
(% who agree)

Avid Sports Fans  
**52%**

Female Sports Fans  
**50%**

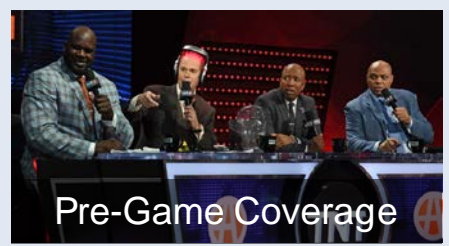
Black Sports Fans  
**74%**

Hispanic Sports Fans  
**59%**

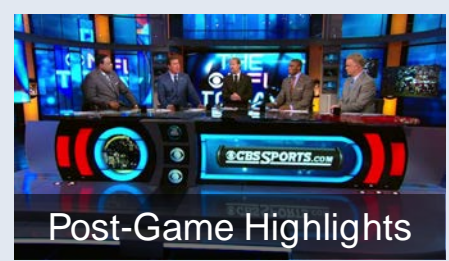
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# The 360-degree experience that TV networks provide - pre & post game coverage, commentary and analysis, multiple camera angles and replays - keeps viewers consistently engaged throughout the event

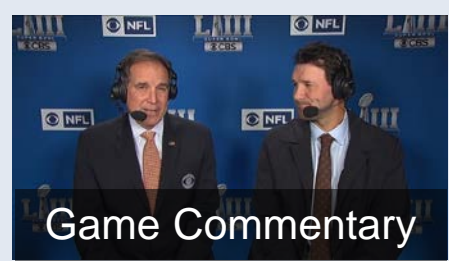
"I enjoy watching pre-game coverage and post-game highlights"  
**70% / 81%**



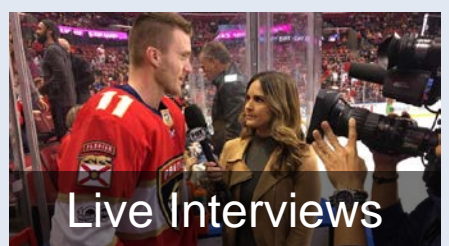
"Hearing the announcers and commentators makes it easier to keep up with the action"\*  
**80% / 84%**



**All Sports Fans / Avid Sports Fans**



"Watching 'off-the-field' coverage (including live interviews, highlights, etc) is important to me"\*  
**62% / 68%**



"I have a better experience watching a sporting event on TV due to the different camera angles & replays"  
**77% / 79%**

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. \*Q12: Please rate how important the following are in your decision to watch sports at home (Top 2 Box: Somewhat Important & Very Important, (based on respondents who prefer watching sports at home via Q11). Q17: Please rate how much you agree or disagree with the following statement (Top 2 Box: Somewhat Agree & Strongly Agree), (based on respondents who prefer watching sports at home via Q11), Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), All Sports Fans based on P18+.


# Brands and leagues are using a mix of advanced technologies, social media and CRM tactics to make the at-home fan feel like they are at the game, literally

**Michelob ULTRA 'Courtside'**




Michelob Ultra partnered with Microsoft's technology to bring fans virtually to the game as the NBA plays within the Orlando bubble. Fans watching from home appear on 17-foot screens that surround the players on three sides of the courts and is seen on the broadcasts.

**Mastercard #PricelessWave**



As the finals for the UEFA Champions League approached, Mastercard brought soccer fans across the world together for the biggest stadium wave through TikTok. The #PricelessWave starts when fans record themselves and raise their arms from the bottom of the screen to the top on TikTok.

**MLB Cheer at the Ballpark**



Without in-stadium fans, the MLB is bringing in the noise through their "Cheer at the Ballpark" app on MLB.com. Through this app fans can cheer on their favorite team and boo their rivals during a game. Crowd noise operators at each ballpark can use this data as a guide to control stadium sounds during a game.

**MLB Cardboard Cutouts & Foul Ball by Mail**



Some MLB teams are bringing the fans back to the stadium through cardboard cutouts. Fans can have themselves featured in the stands in their favorite team gear.

A lucky Pittsburgh Pirates season ticket holder was mailed a foul ball that landed in his empty seat during a game.

Because of the fan passion and engagement, the sports TV viewing experience drives consumer action through the purchase funnel

Females, Black and Hispanic sports fans over-index the average sports fan in action taken through the funnel.

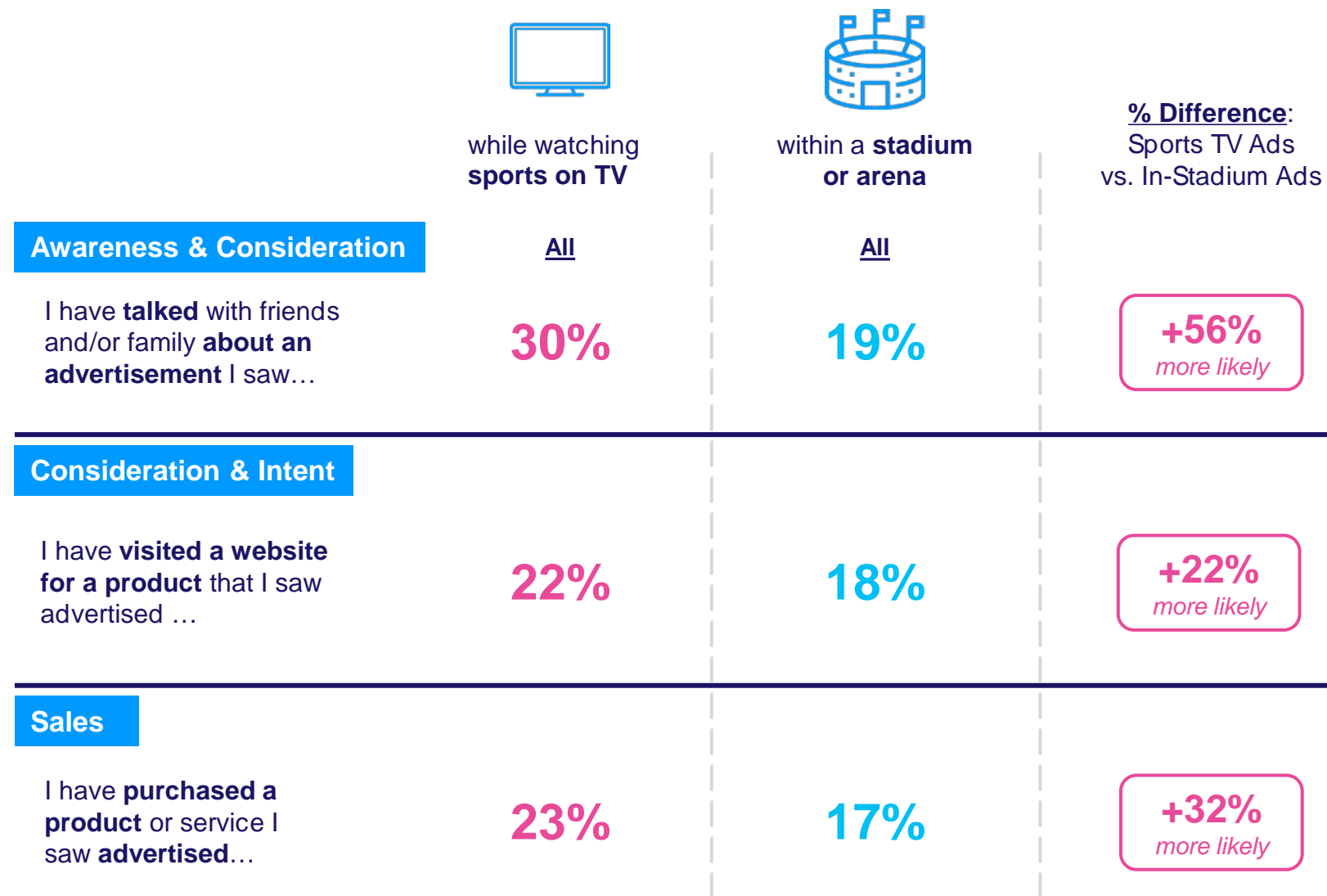
% Of Sports Fans Who Have Done The Following...

Awareness & Consideration	All	Avid	Male	Female	Black	Hispanic
I have <b>talked</b> with friends and/or family <b>about an advertisement</b> I saw while watching <b>sports on TV</b>	30%	34%	26%	35%	40%	34%
Consideration & Intent						
I have <b>visited a website for a product</b> that I saw advertised while watching <b>sports on TV</b>	22%	26%	21%	23%	28%	23%
Sales						
I have <b>purchased a product</b> or service I saw <b>advertised</b> while watching <b>sports on TV</b>	23%	26%	23%	24%	25%	26%

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18. Which of the following statements do you believe are true for you? Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+.

In 'normal' times, due to the comfort, convenience and connectivity during at-home viewing, sports fans are more likely to engage, and take action, with TV advertising than advertising they see in-stadium at a game

% Of Sports Fans Who Have Done The Following...



Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18. Which of the following statements do you believe are true for you?

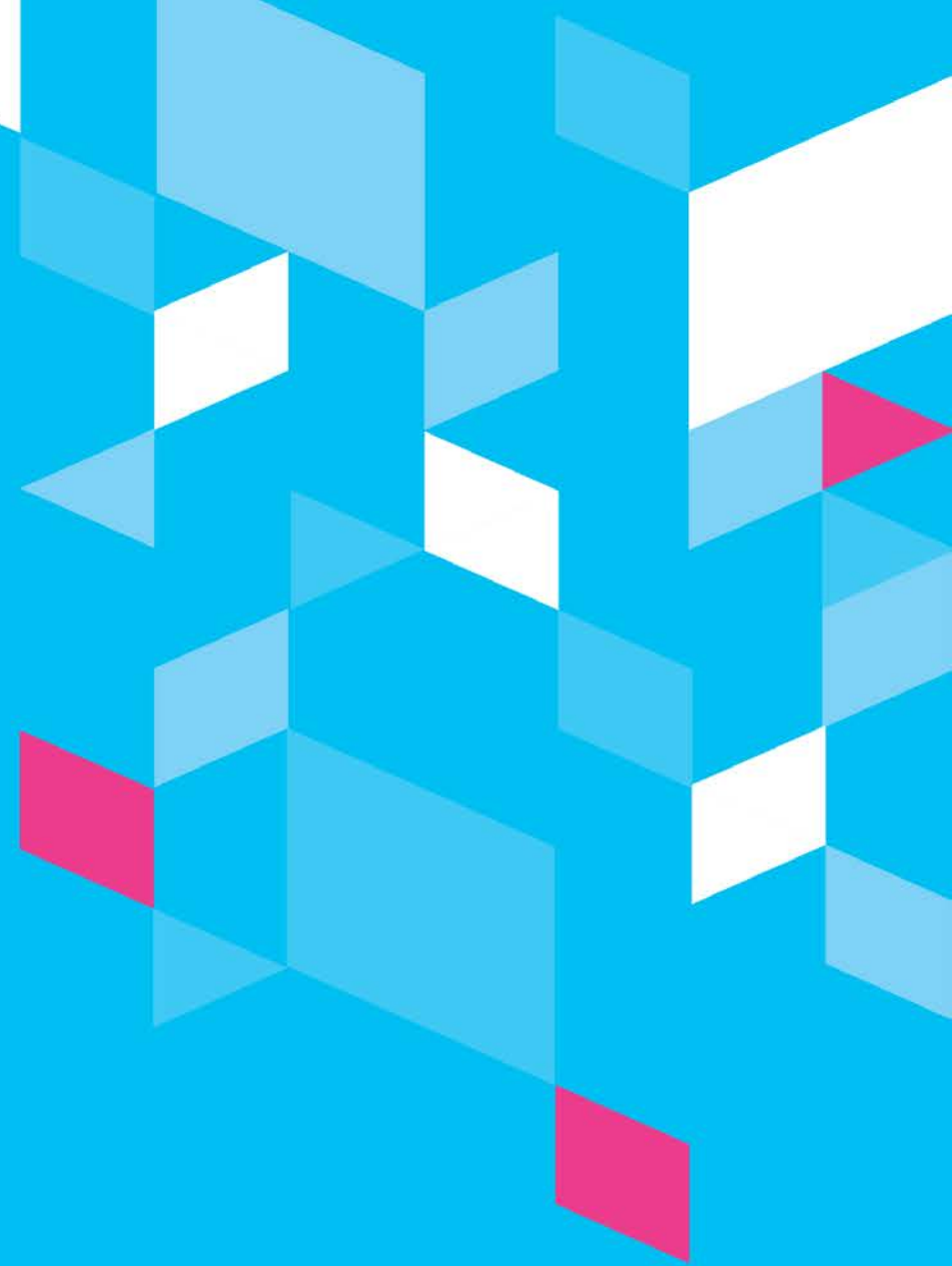
## Summary: The Real 'Home Field Advantage'

- ▶ Although sports are back, the in-stadium experience looks very different due to social distancing, which is ok because most fans prefer watching sports at home
- ▶ Whether hosting friends and family with food and drink or having a front row seat by yourself for any game, fans that used to typically attend games can easily replicate the gameday experience at home
- ▶ At-home viewing satisfies six human need states – comfort / convenience, connection, camaraderie / community, commitment, contact, comprehension – the fulfillment of which is more important than ever during the pandemic
- ▶ Multiscreen TV and social media work together to enhance the total viewing experience
- ▶ Even in non-pandemic times, sports fans are more likely to engage with TV advertising than advertising they see in-stadium

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# Away Games

Building Audiences Through Out-Of-Home  
Viewing

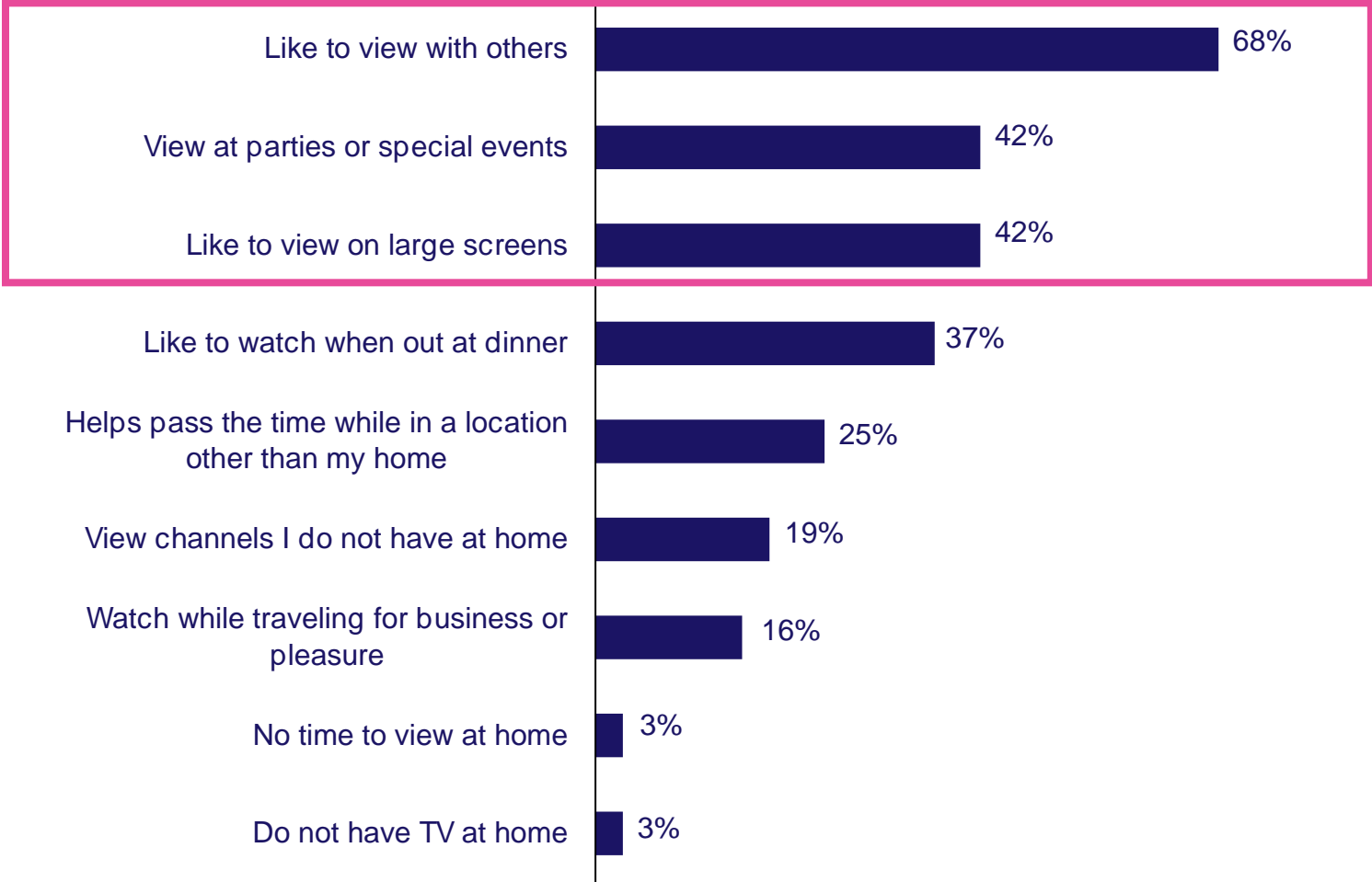


# Out-Of-Home viewing of live sports on TV is typically a communal experience

We supplemented our custom survey with data from a Nielsen OOH study which found that more than half of fans (54%) primarily watch sports out-of-home with **three or less people**.

This figure is considered 'safe' by pandemic guidelines for gatherings at other people's homes and socially-distanced set-ups at restaurants and bars.

What are Reasons for Viewing Sports Out-Of-Home?  
Adults 18+



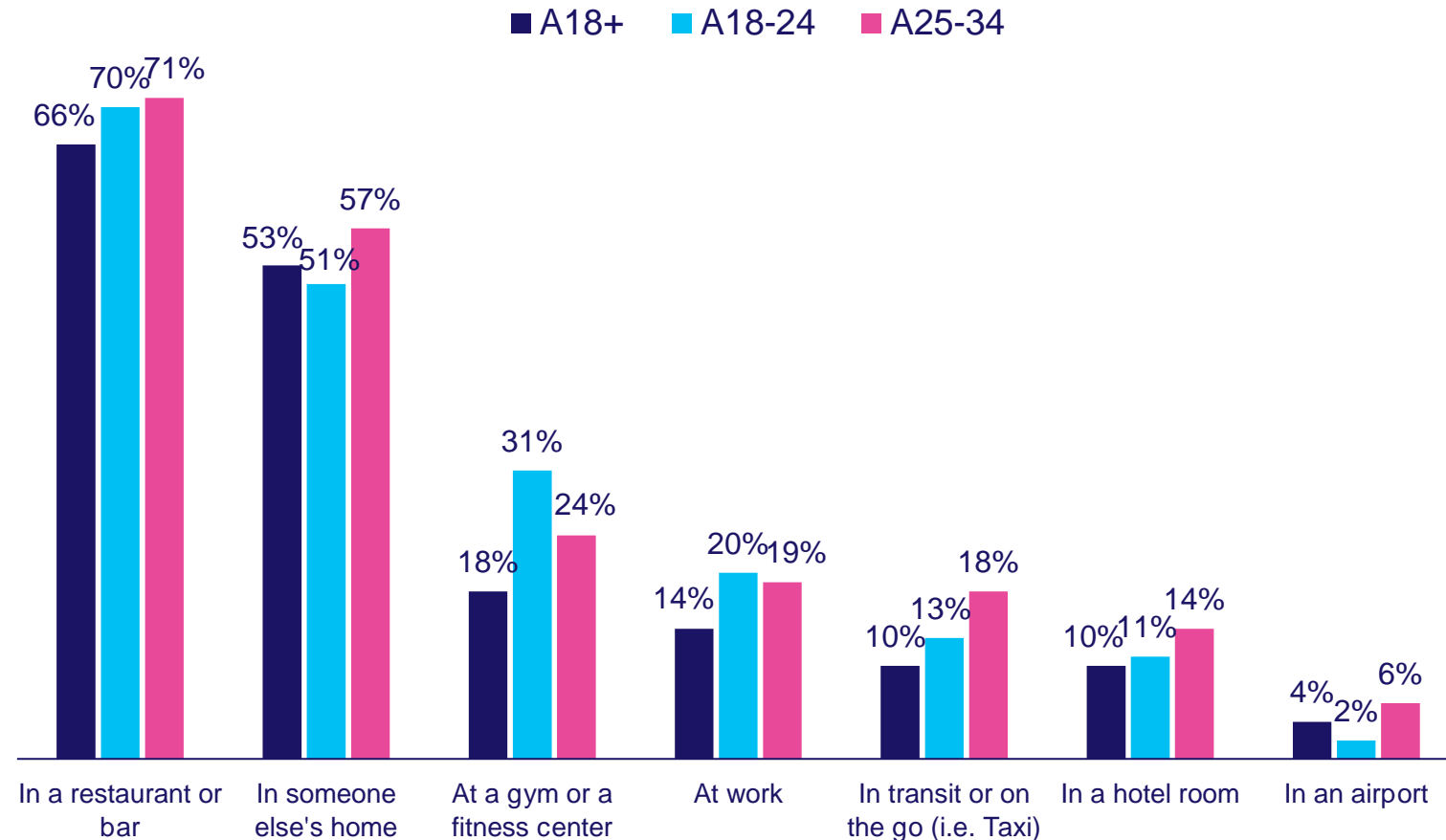
Source: VAB analysis of Nielsen Fall Sports, Game On: Driving Brand Engagement and Co-Viewing On Linear TV With Out-Of-Home Audiences; 2019. Reflects multiple responses chosen from respondents in Nielsen's Out-of-Home Fall Sports Location Survey, General Population (10/29/18-10/31/18). Survey participants were able to select responses for each viewing event, leading to a distribution of over 100%.

While most out-of-home viewing occurs in restaurants / bars or at someone else's home, the comfortable, controlled environment of someone's home has taken on even more importance given the current pandemic

Watching sports with friends or family is important to many fans:

- **83%** of fans believe that live sports brings family together in ways that other activities can't.
- **66%** of fans watch sporting events on TV at home with family and/or friends.

### Where Do People View Sports Out-Of-Home?



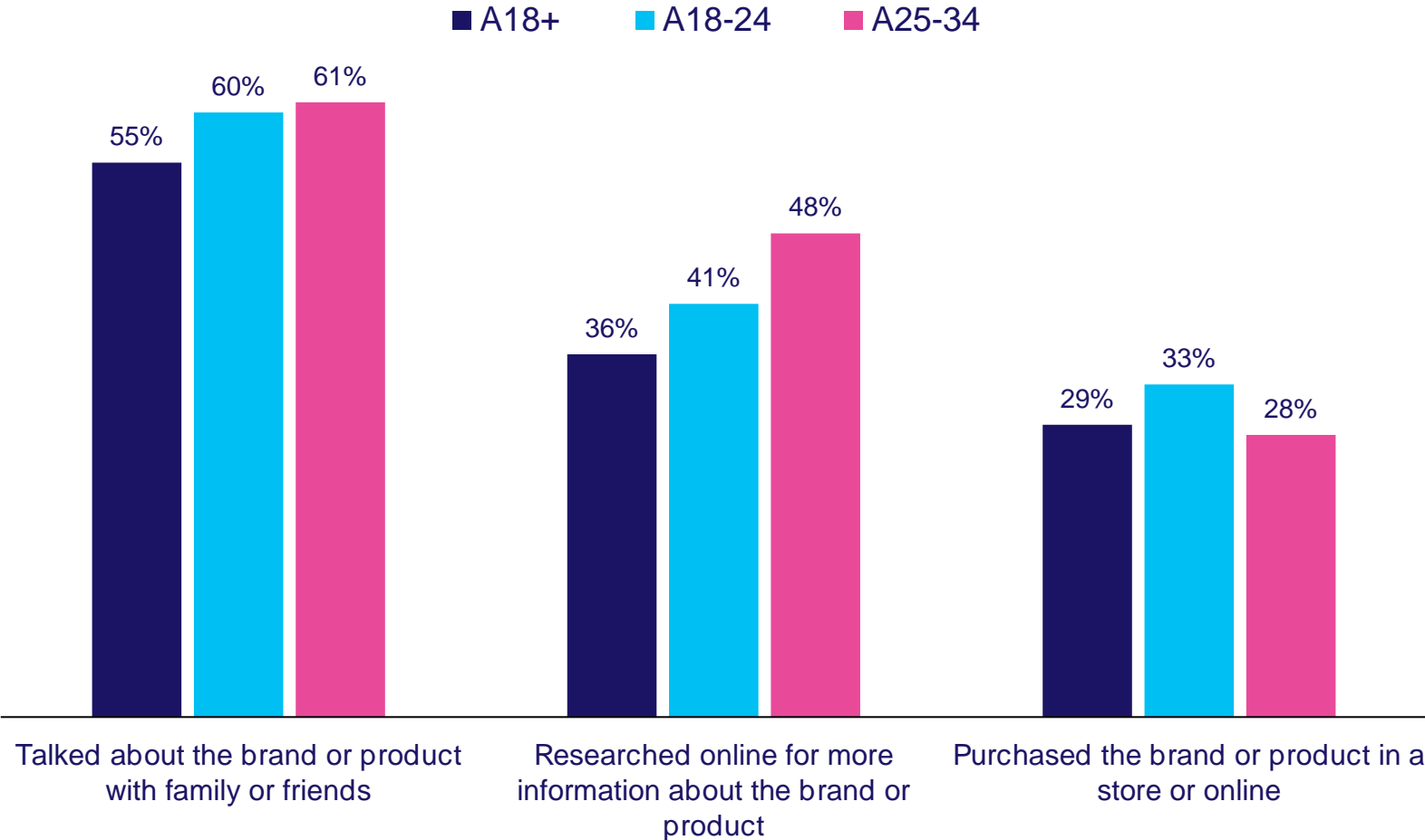
Source: NBC Sports Group "The Impact of Live Sports In 2020"; VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base = self-identified sports fans, P18+. Q18: Which of the following statements do you believe are true for you?, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc). All Sports Fans based on P18+; VAB analysis of Nielsen Fall Sports, Game On: Driving Brand Engagement and Co-Viewing On Linear TV With Out-Of-Home Audiences; 2019. Reflects multiple responses chosen from respondents in Nielsen's Out-of-Home Fall Sports Location Survey, General Population (10/29/18-10/31/18). Survey participants were able to select responses for each viewing event, leading to a distribution of over 100%.

The communal aspect of out-of-home viewing among close friends and family is also effective for driving engagement around ads airing during live sporting events

With 92% of OOH sports viewers saying they pay attention to at least some of the ads airing, it's easy for them to talk to others about brands they see and research brands on their mobile devices while watching a game.

This behavior is even more prevalent among younger demos.

Action Taken as a Result of Seeing an Ad While Watching Sports Out-Of-Home



Source: VAB analysis of Nielsen Fall Sports, Game On: Driving Brand Engagement and Co-Viewing On Linear TV With Out-Of-Home Audiences; 2019. Reflects multiple responses chosen from respondents in Nielsen's Out-of-Home Fall Sports Location Survey, General Population (10/29/18-10/31/18). Survey participants were able to select responses for each viewing event, leading to a distribution of over 100%.

## Summary: **Away Games**

- ▶ **While out-of-home viewing is typically a communal experience, more than half of fans primarily watch sports away from home with three or less people – conducive for in-home gatherings and restaurants/bars following social distancing guidelines**
- ▶ **The comfortable, controlled environment of someone else's home has taken on even more importance for out-of-home viewing given the pandemic and the desire for people to socialize with their close circle of family and friends**
- ▶ **Much like we see for at-home, out-of-home viewing is effective for driving engagement around advertisements that air during live sporting events especially among younger audiences**

# Key Takeaways For Marketing Plans



## Better Consumer Understanding Drives Sharper Campaigns

By understanding what motivates consumers to view at home (notably, the need for camaraderie, conversation, comfort and convenience), marketers can create campaigns that resonate – ranging from messaging to the types of activations and promotions that are developed.



## Be Part of The Gameday Experience at Home

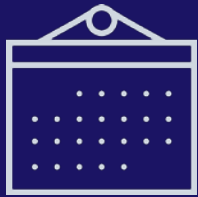
With fans recreating the gameday at home, there are opportunities for brands to be a part of that experience. For example, initiatives like curating custom music play lists or developing co-op local TV partnerships with restaurants and delivery services help weave your brand into the consumer experience.



## Harness the Power of Social Engagement

The insatiability of fans to talk, share and connect over sports means there's a great opportunity for brands in paired TV and social opportunities. The two platforms work together to enhance and help further engage fans in the overall viewing experience.

# Key Takeaways For Marketing Plans



## Take Advantage of the Full Live Sports Calendar to Drive Impact Through 2H

Between the already planned sports seasons and several other major leagues playing outside of their typical schedule dates, marketers will have even more opportunities to connect and engage with consumers through live sports programming.



## Expand Reach and Engagement Through OOH Viewing

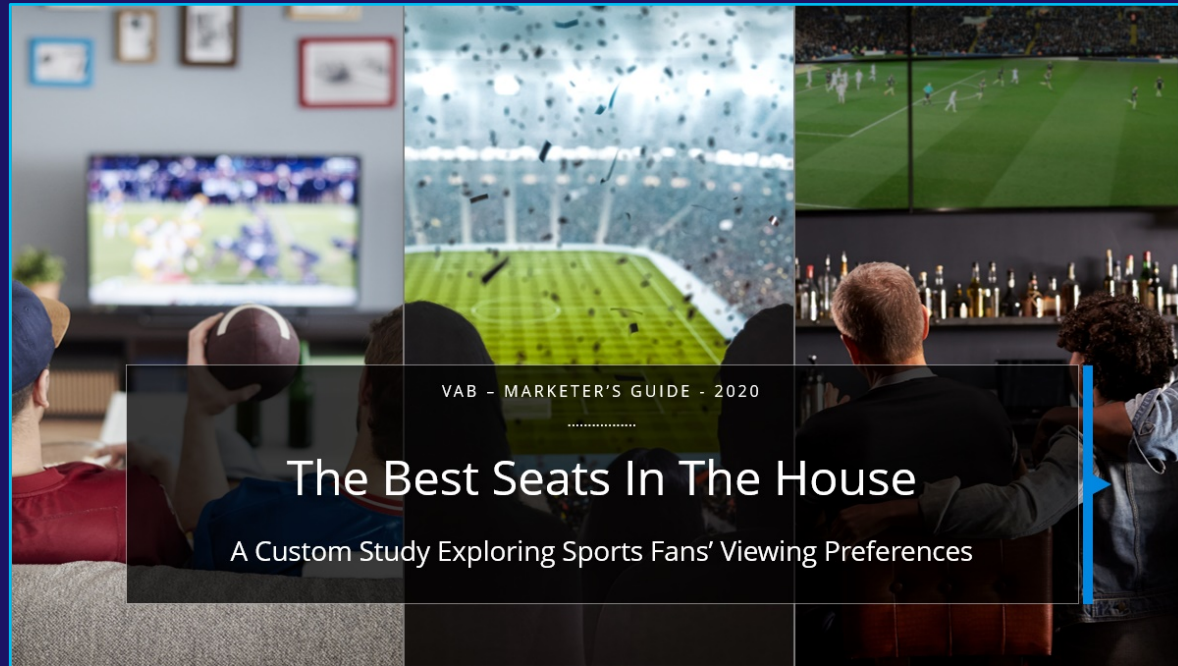
The growth in out-of-home viewing offers marketers a valuable reach and engagement extension beyond people who are watching sports within their own home.



## Re-think Marketing Investments to Follow the Consumer

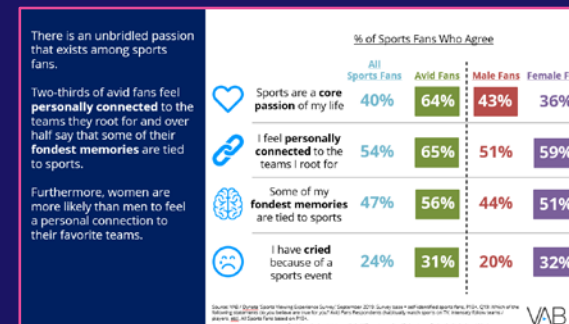
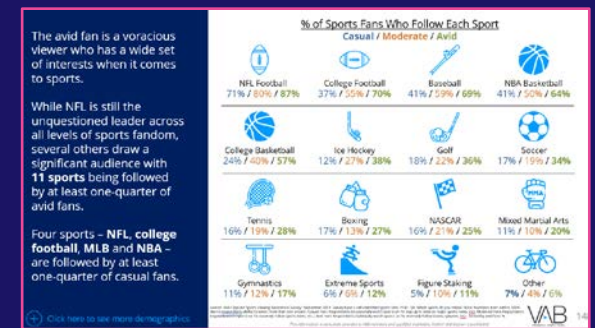
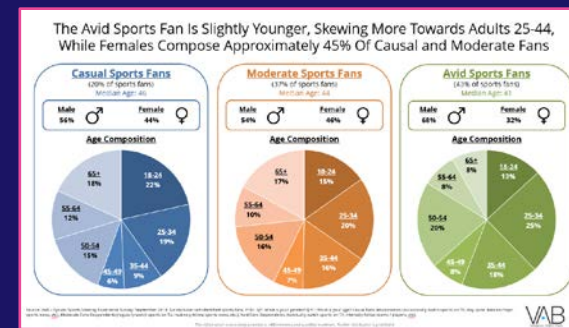
Marketers who normally invest in in-stadium sponsorships and activations can follow those consumers by utilizing a variety of multiscreen TV solutions. This is particularly impactful considering that at-home viewers (and those watching OOH) are more likely to take action than those in-stadium.

# Download our original marketer's guide to learn more about today's sport fan and the unbridled passion that exists across audience segments



[Click here to download report](#)

Sampling of slides with insights into today's sports fan available in our full marketer's guide



# Thank You

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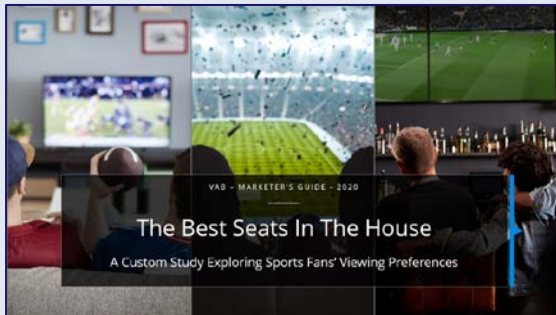
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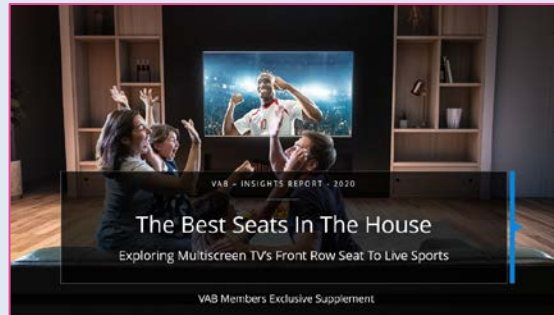
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