



VAB – INSIGHTS REPORT - 2020

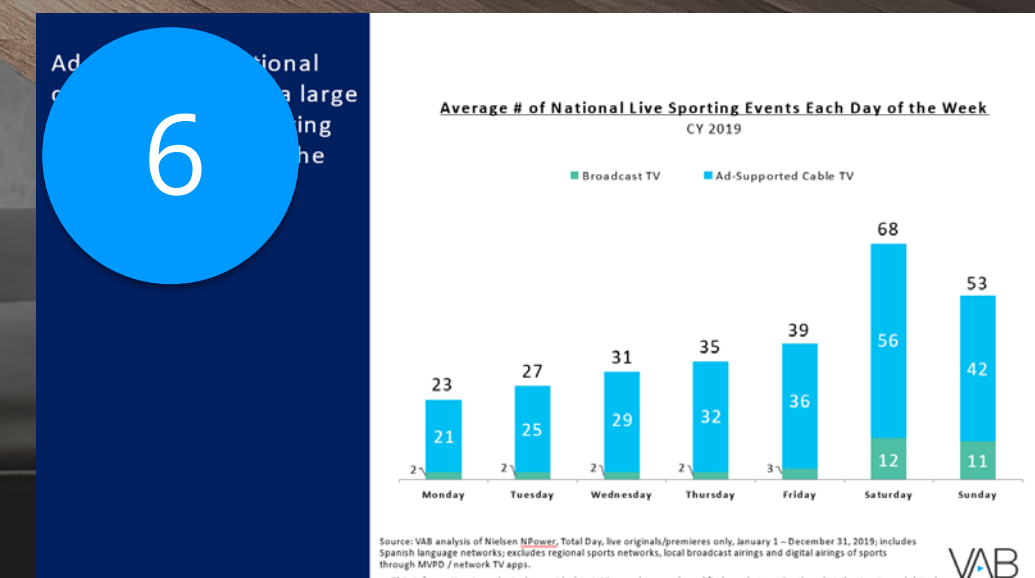
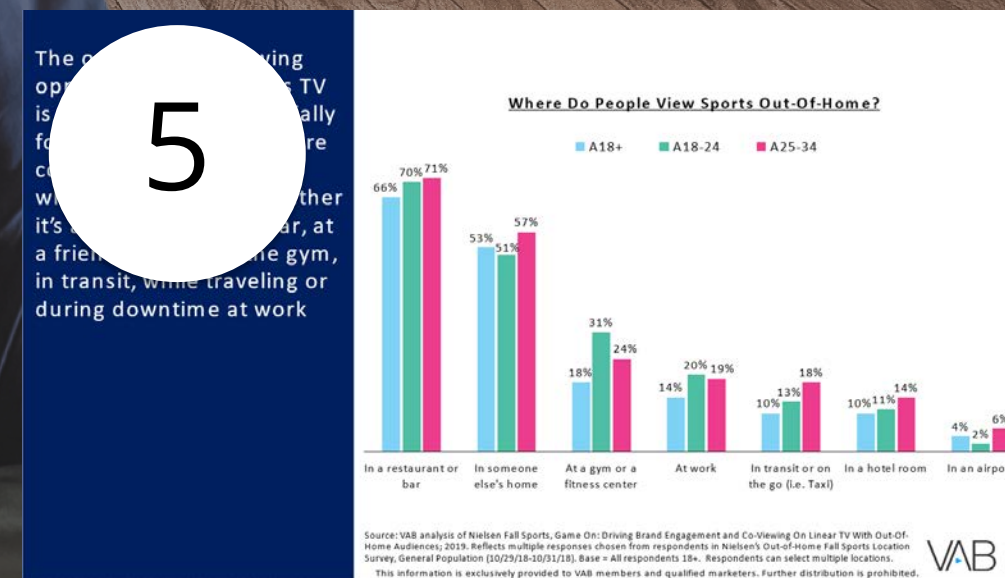
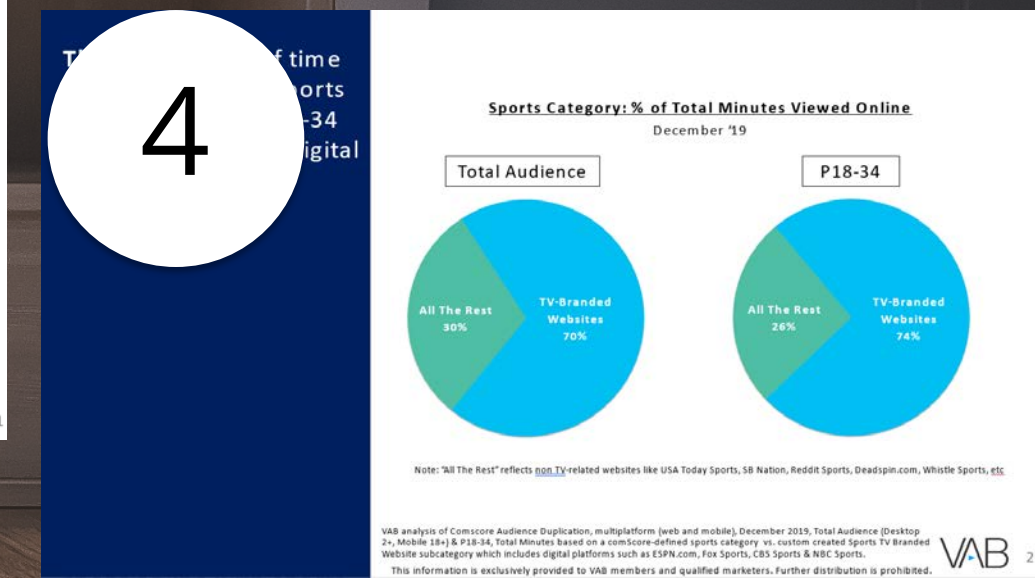
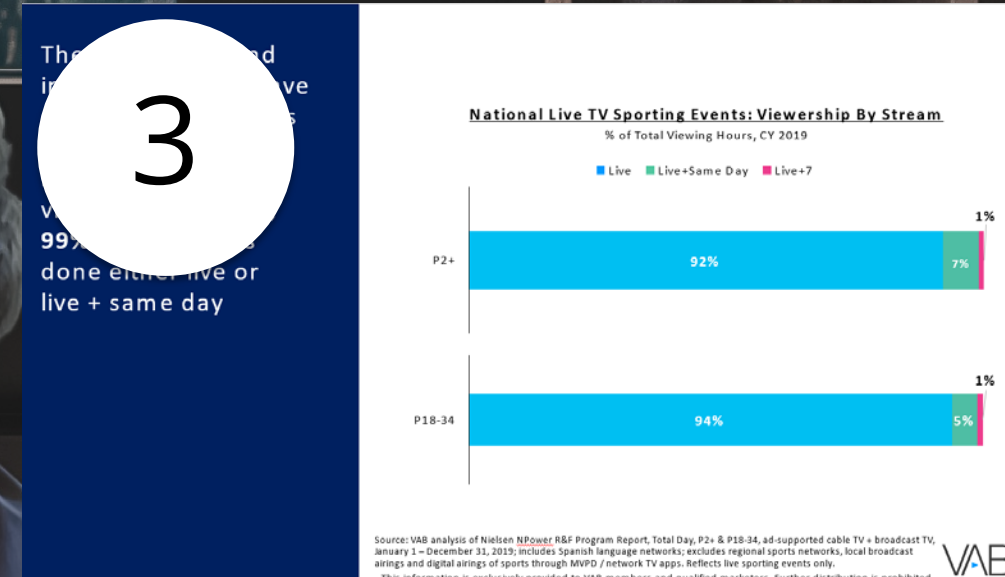
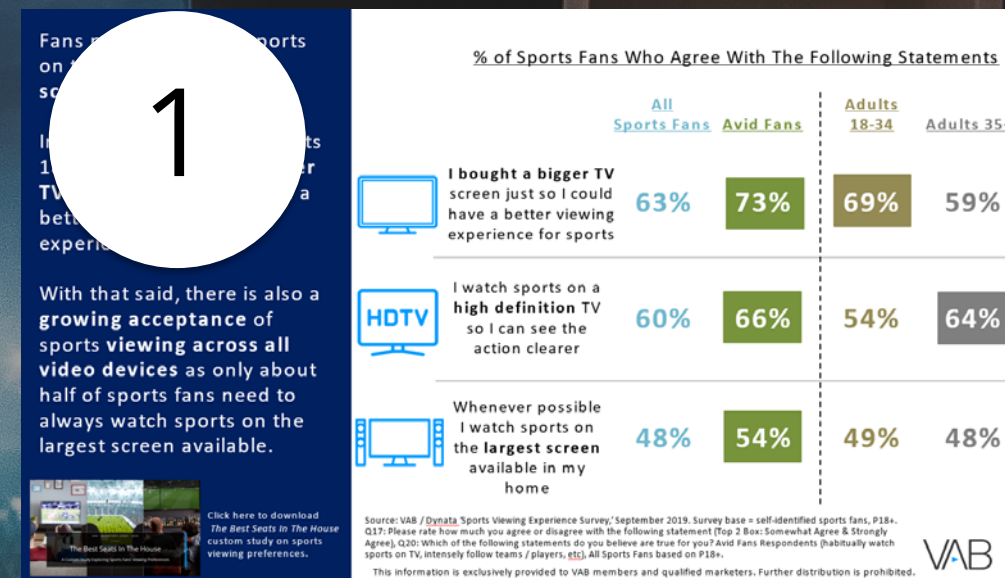
# The Best Seats In The House

Exploring Multiscreen TV's Front Row Seat To Live Sports

VAB Members Exclusive Supplement

# Program

- 1 Understanding Sports Fans' Viewing Preferences
- 2 Multiscreen TV: What Does A Better Viewing Experience And Value Get You?
- 3 Viewers Embrace Sports Content On TV
- 4 One-Two Punch: Sports Engagement Extends Across Screens
- 5 Away Games: Building Audiences Through Out-Of-Home Viewing
- 6 Appendix: A Deeper Into Sports TV Programming





## Game Summary

VAB recently commissioned *Dynata* to conduct the 'Sports Viewing Experience' survey to understand sports fans' preferences for live sports viewing with a particular focus on at-home viewing and in-person event attendance ([full custom study report available for download here](#)).

While it's no surprise that almost all sports fans, regardless of their level of fandom (casual or avid), age, gender or ethnicity watch live sports at home, over 70% of all sports fans prefer home viewing over any other location.

These fans like watching sports from the comfort of their own home, across video devices, due to the better viewing experience, the ability to have a front row seat to every game and the conveniences they can enjoy as opposed to the hassles involved with attending games in-person (traffic, distance, long lines, etc).

In addition to these benefits, multiscreen TV is also comparatively less expensive at a fraction of the cost for a family of four to attend one sporting event in either of the four major sports.

So what does the multiscreen TV value proposition offer to a consumer? Access to over 14,100 nationally televised live sports annually with a front row seat to marquee events airing exclusively through multiscreen TV providers.

Also, viewership extends beyond the television as over 80% of adults 18-34 visit at least one TV-branded digital sports platform monthly and out-of-home viewing builds additional exposure by reaching people who may not ordinarily watch sports at home.




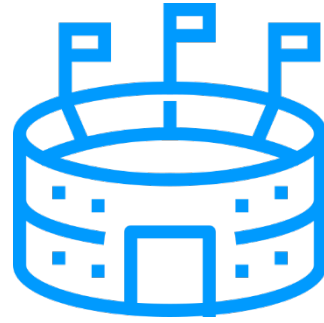
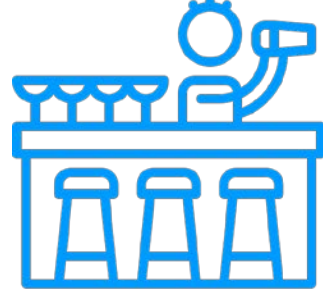


# Understanding Sports Fans' Viewing Preferences



In September 2019, VAB commissioned *Dynata* to conduct the 'Sports Viewing Experience' survey to understand fans' preferences for live sports viewing.

**Almost all sports fans** regardless of their level of fandom, age, gender or ethnicity **watch live sports at home.**

## Where Do Sports Fans *Typically* Watch Sports?

Sports Fan Type					
	Home	Stadium or Arena	Bar or Restaurant	Someone Else's Home	Elsewhere (airport, gym, hotel, etc.)
All	96%	31%	30%	28%	7%
Avid	98%	43%	41%	37%	12%
Moderate	96%	26%	25%	24%	4%
Casual	92%	17%	17%	17%	3%
Adults 18-34	93%	34%	35%	35%	8%
Adults 35+	98%	30%	28%	24%	7%
Male	96%	29%	30%	30%	8%
Female	96%	35%	31%	31%	6%
Black	89%	30%	28%	28%	8%
Hispanic	92%	34%	34%	34%	8%


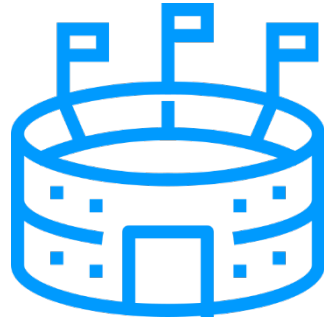

Source: VAB / Dynata 'Sports Viewing Experience Survey,' September 2019. Survey base: self-identified sports fans, P18+. Q10: Where do you typically watch sports? All Sports Fans based on P18+, Avid Fans Respondents (habitually watch sports on TV, intensely follow teams / players, etc), Casual Fans Respondents (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.

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Click here to download *The Best Seats In The House* custom study on sports viewing preferences.

Regardless of the type of sports fan, at least **two-thirds prefer watching sports from the comfort of their own home**, with males slightly more inclined than the average sports fan.

## 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>Adults 18-34</b>	<b>66%</b>	<b>23%</b>	<b>11%</b>
<b>Adults 35+</b>	<b>76%</b>	<b>17%</b>	<b>7%</b>
<b>Male</b>	<b>74%</b>	<b>18%</b>	<b>9%</b>
<b>Female</b>	<b>70%</b>	<b>22%</b>	<b>7%</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>

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.

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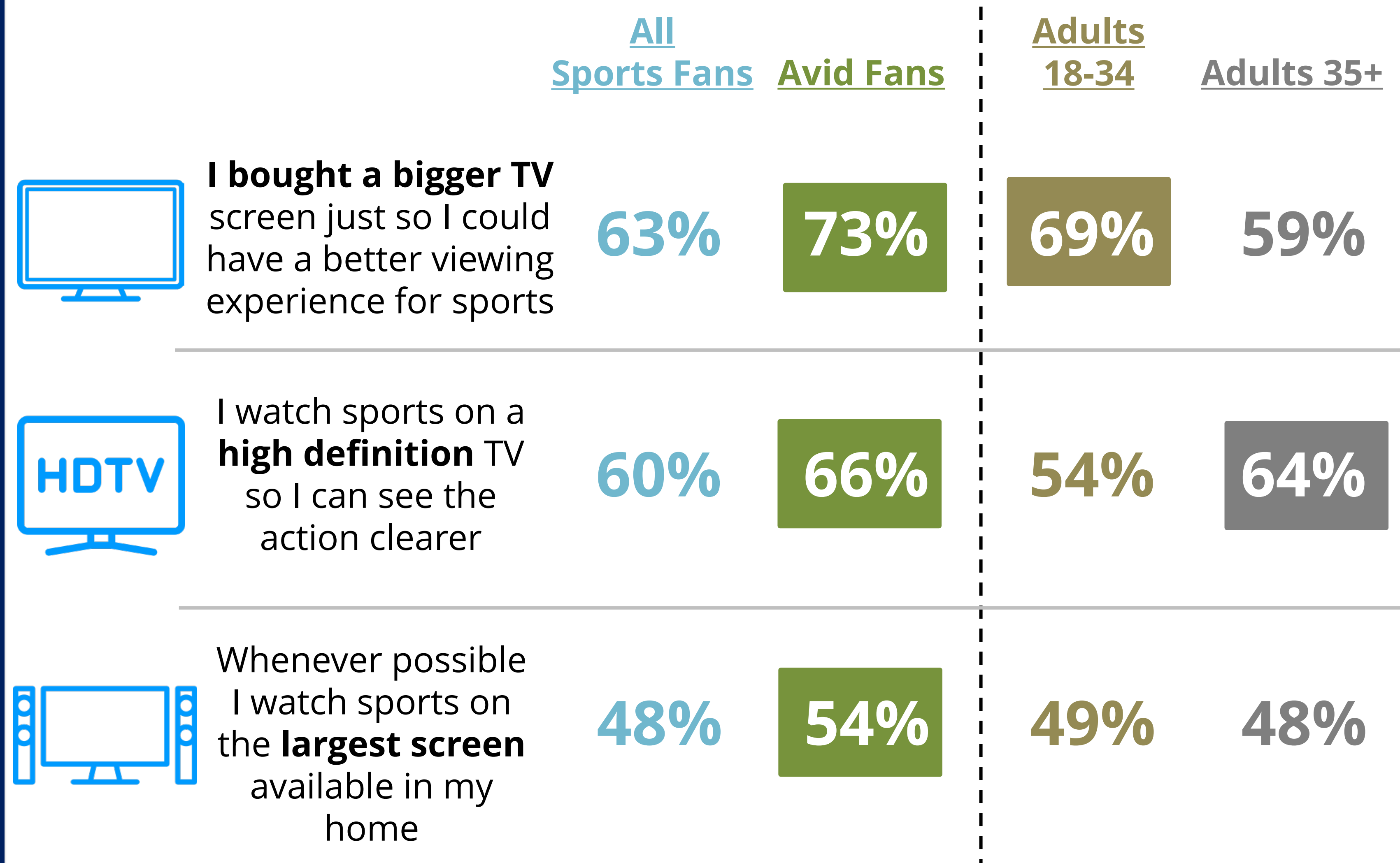
The Best Seats In The House  
A Custom Study Exploring Sports Fans' Viewing Preferences

Fans prefer to watch sports on the **largest, clearest screen possible**.

In fact, **almost 70%** of adults 18-34 have **bought a bigger TV** just so they could have a better sports viewing experience.

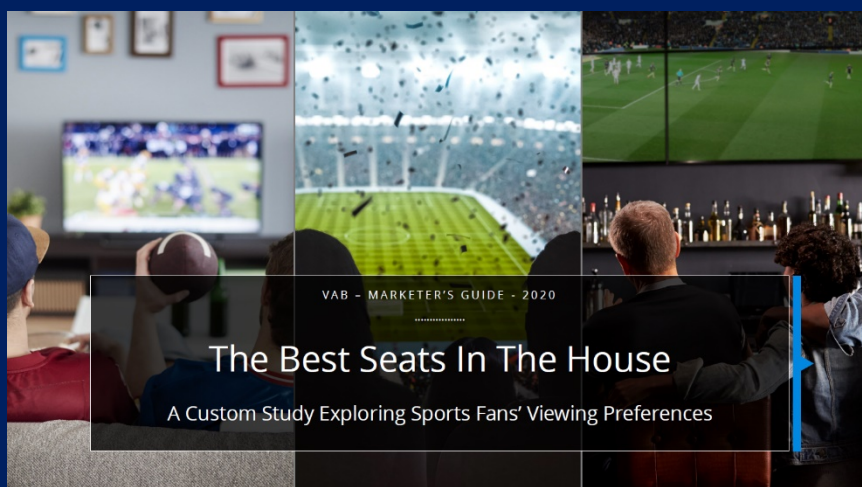
With that said, there is also a **growing acceptance** of sports **viewing across all video devices** as only about half of sports fans need to always watch sports on the largest screen available.

% of Sports Fans Who Agree With The Following Statements



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+.

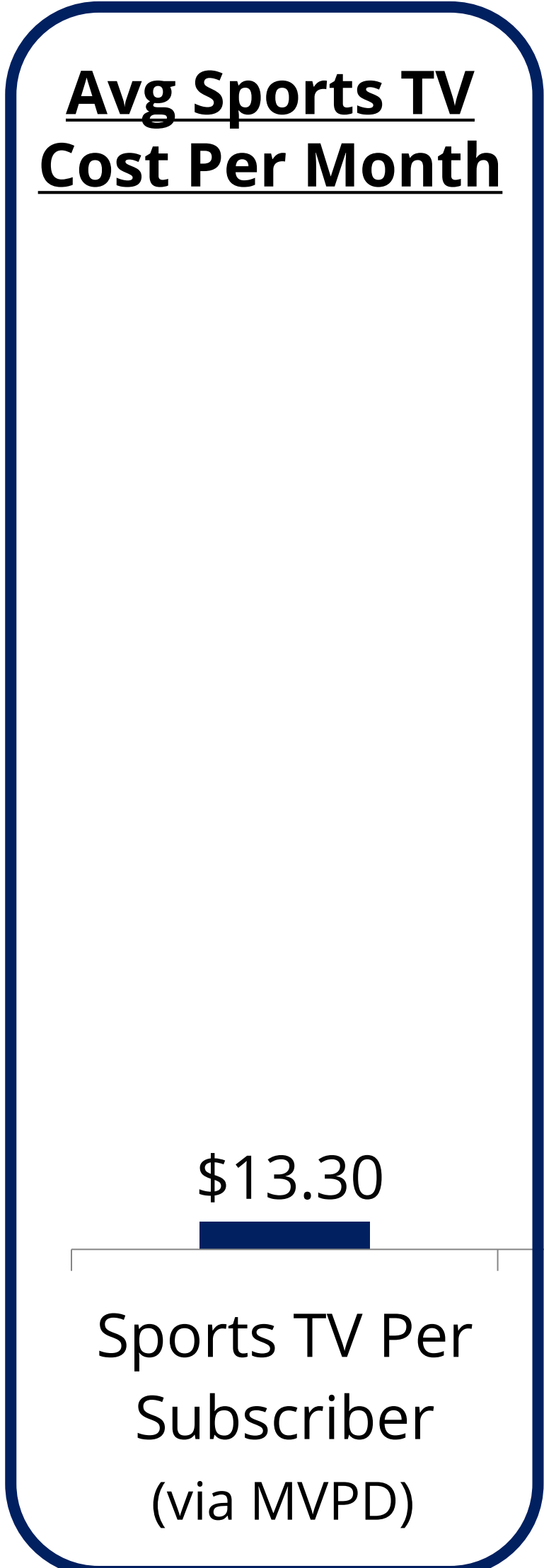
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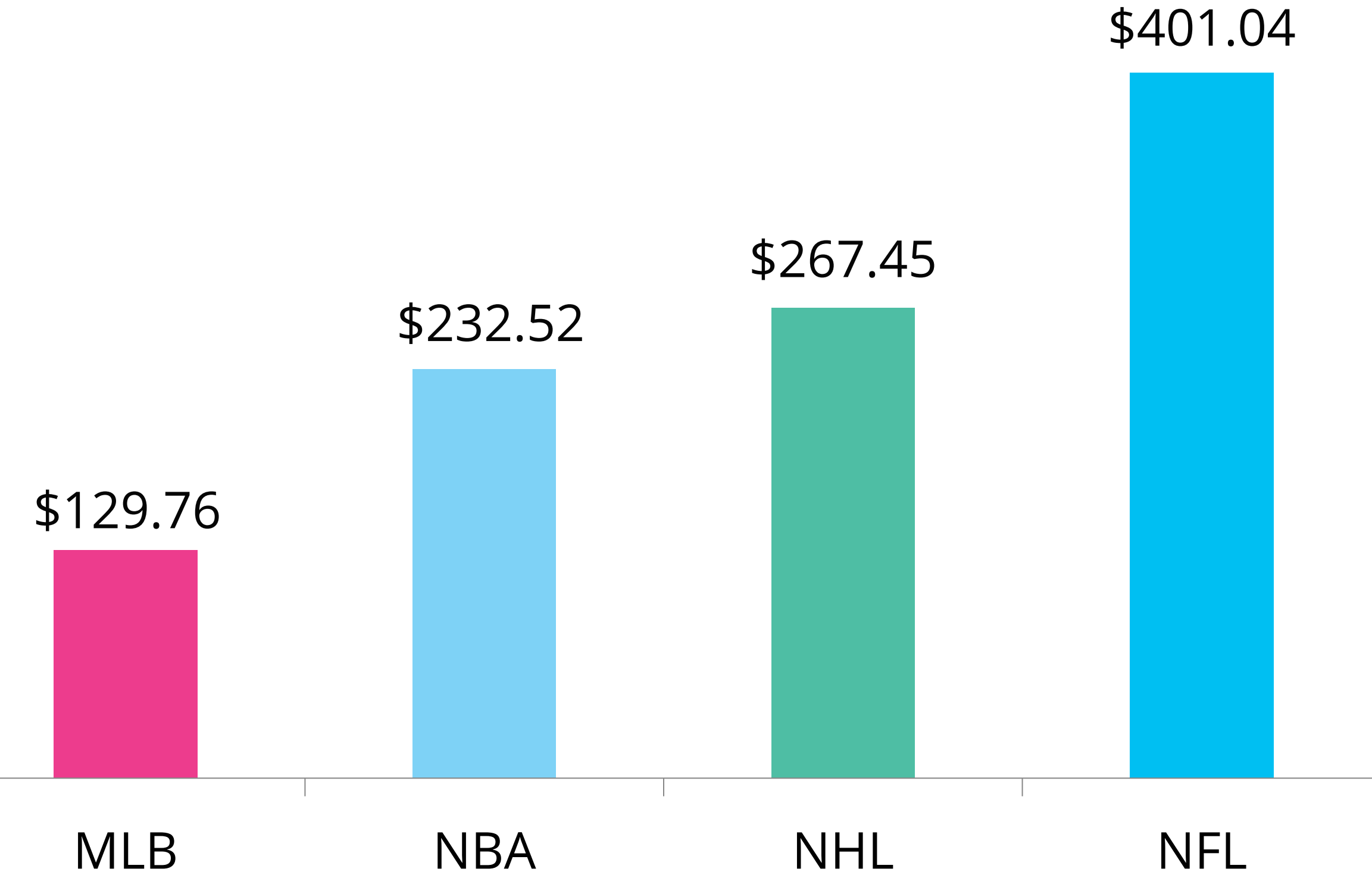
Click here to download *The Best Seats In The House* custom study on sports viewing preferences.

For consumers, on top of a better viewing experience, comfort & convenience, watching sports on multiscreen TV is also **comparatively inexpensive**.

The average MVPD subscriber pays only \$13.30 per month to receive sports TV networks as part of their cable subscription, which is a fraction of the cost for a family of four to go to **one sporting event** in either of the four major American sports.



**2018 Average Ticket Price for a Family of Four**



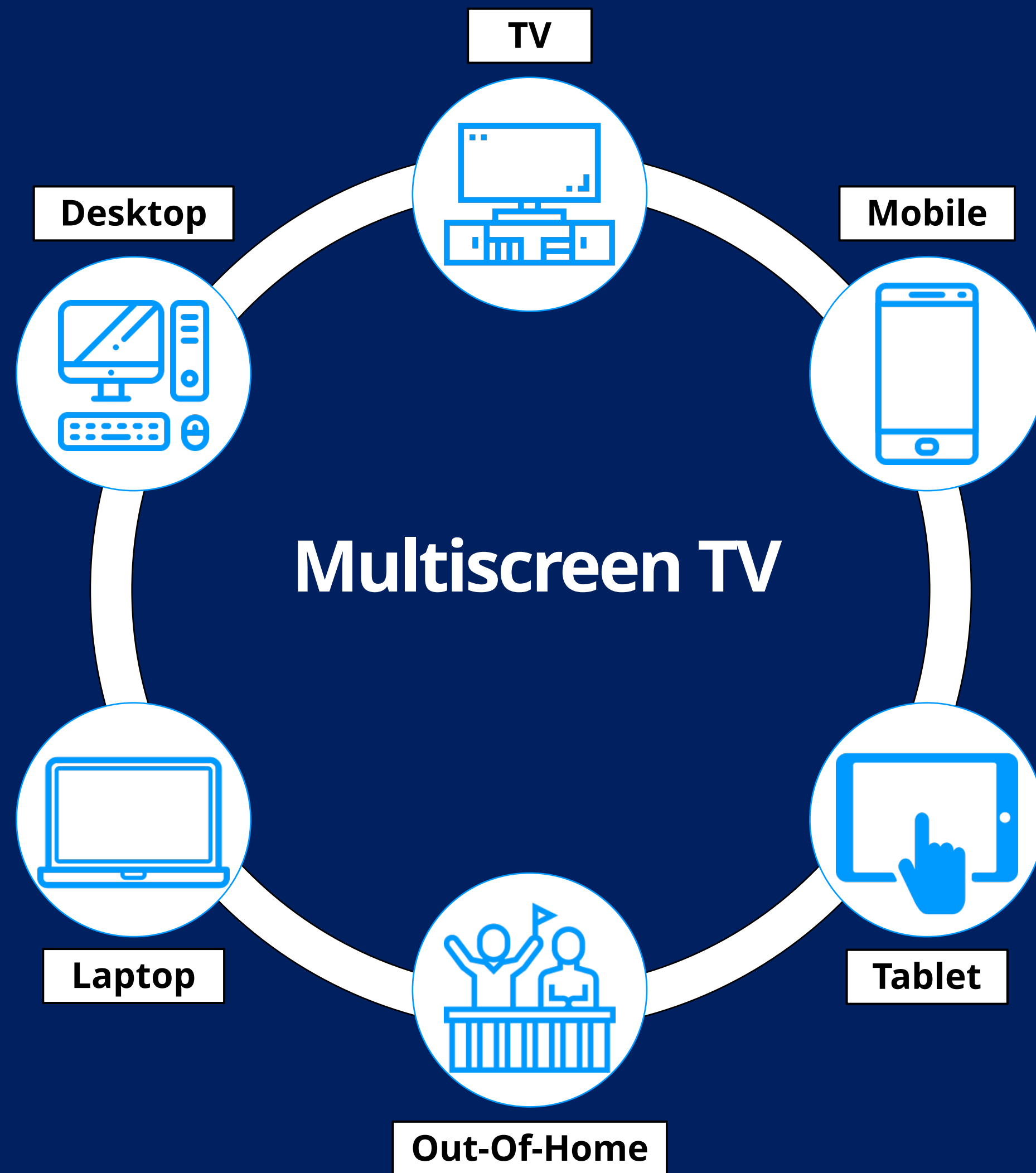
Source: VAB analysis of S&P Global Intelligence, The 2019 Sports Report (2018 average cost per subscriber for sports TV network package include ESPN nets, Fox Sports nets, NBC Sports, CBS Sports, Tennis, NFL Net, Golf, MLB Net, beIN, Outdoor, etc; excludes RSN costs). Average ticket price per sport based on figures reported in the MPAA 2018 THEME Report (via Team Marketing Report).





**Multiscreen TV:** What Does A Better Viewing Experience And Value Get You?

# Multiscreen TV Provides A Guaranteed Front Row Seat To Thousands Of Live Sporting Events Each Year, Available Across Devices Regardless Of Where You Are



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# This Includes A Front Row Seat To Marquee Sporting Events Ingrained In Popular Culture Airing Exclusively On Multiscreen TV Throughout The Year

Washington Nationals win their first World Series title



Bianca Andreescu defeats Serena Williams to win the 2019 U.S. Open



U.S. Women's Soccer team wins their fourth World Cup



Toronto Raptors beat the Golden State Warriors to win the 2019 NBA Championship



Country House wins the 2019 Kentucky Derby at 65-1 odds after Maximum Security was disqualified



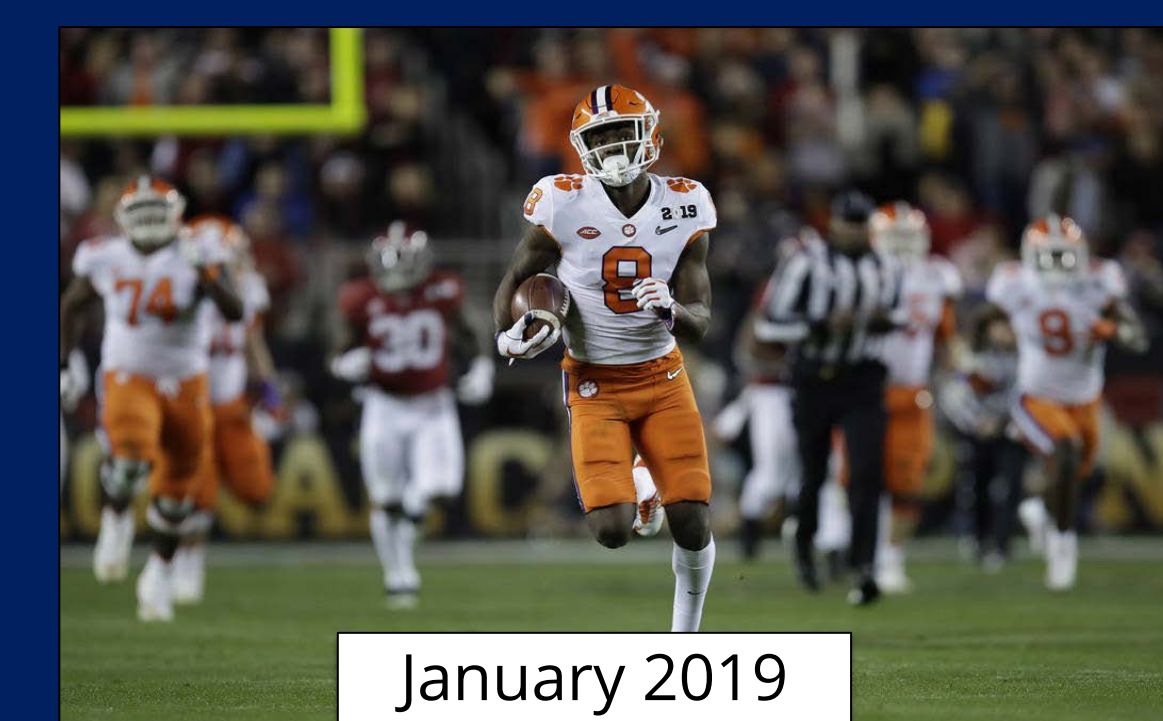
Tiger Woods wins the Masters, his first major win in 11 years



New England Patriots win their sixth Super Bowl

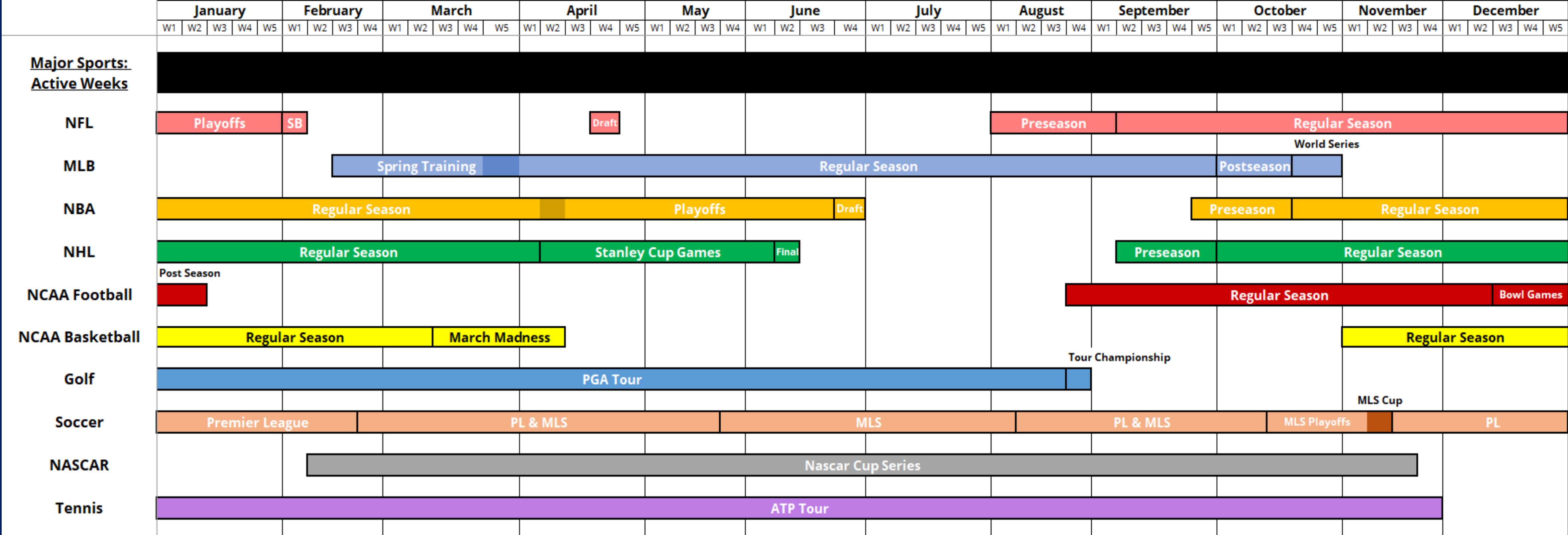


Clemson beats Alabama to win the CFP National Championship



# There Is Continuity Throughout The Year As Live Sports Are Always 'In Season' With At Least Five Major Sports Active In Each Month

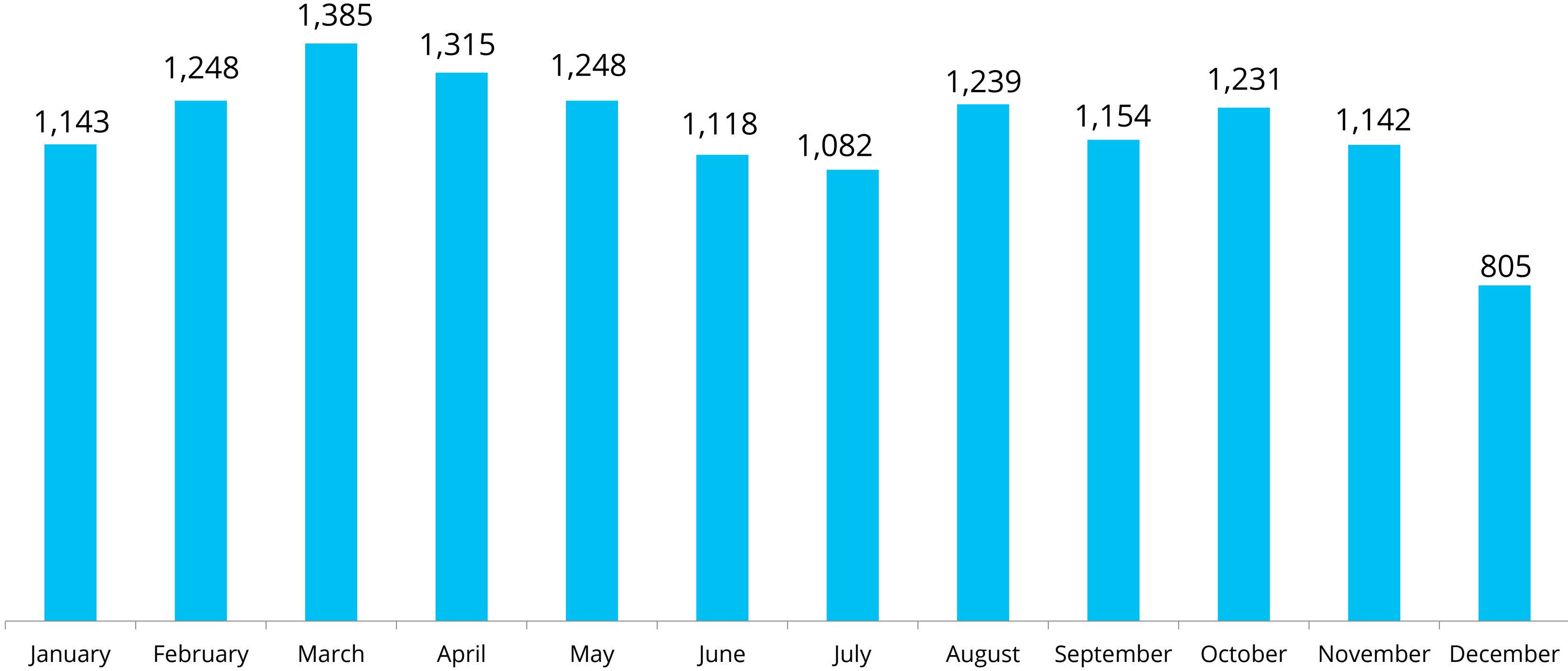
## 2020 Calendar For 10 Major Sports



Which means, at an average subscriber cost of \$13.30 per month, viewers can enjoy a selection of **1,176** live sporting events on average each month airing on national TV and available across devices

**# of National Live Sporting Events Per Month**

2019



*Note: Summer is dominated by the MLB, a sport that has the vast majority of its games airing on RSNs which are not reflected in the above chart.*

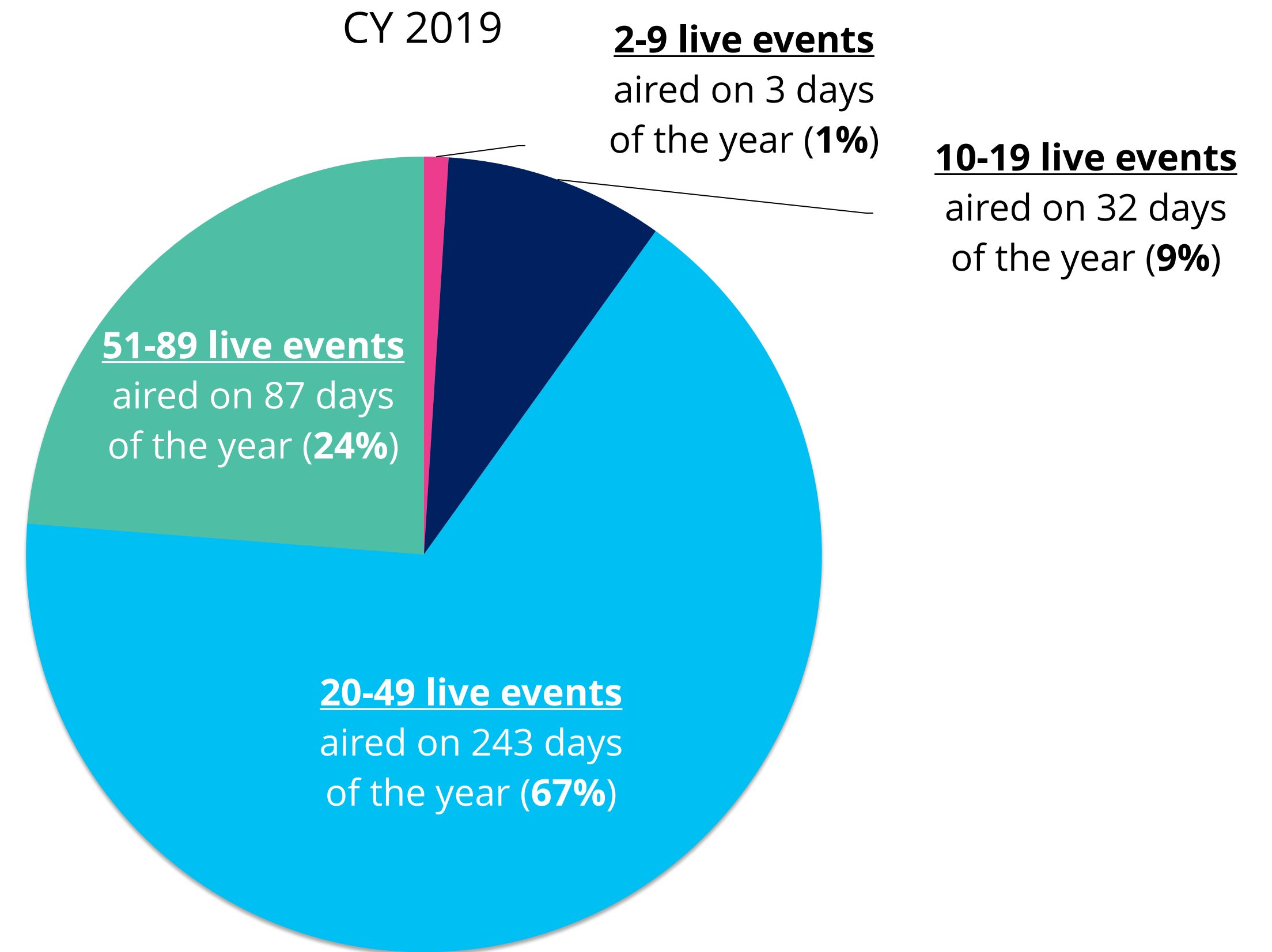
Source: VAB analysis of Nielsen NPower, Total Day, ad-supported cable TV + broadcast TV, live originals/premieres only, January – December 31, 2019; includes Spanish language networks; excludes regional sports networks, local broadcast airings and digital airings of sports through MVPD / network TV apps.

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Projected out annually at a cost of \$159.60 per MVPD subscriber for sports TV networks, viewers have access to over **14,100** nationally televised live sports over 12 months.

In fact, based on 2019, there were **at least two** live sporting events airing every single day of the year with **90%** of the days airing at least 20 live games.

### # of National Live TV Sporting Events Aired Daily



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

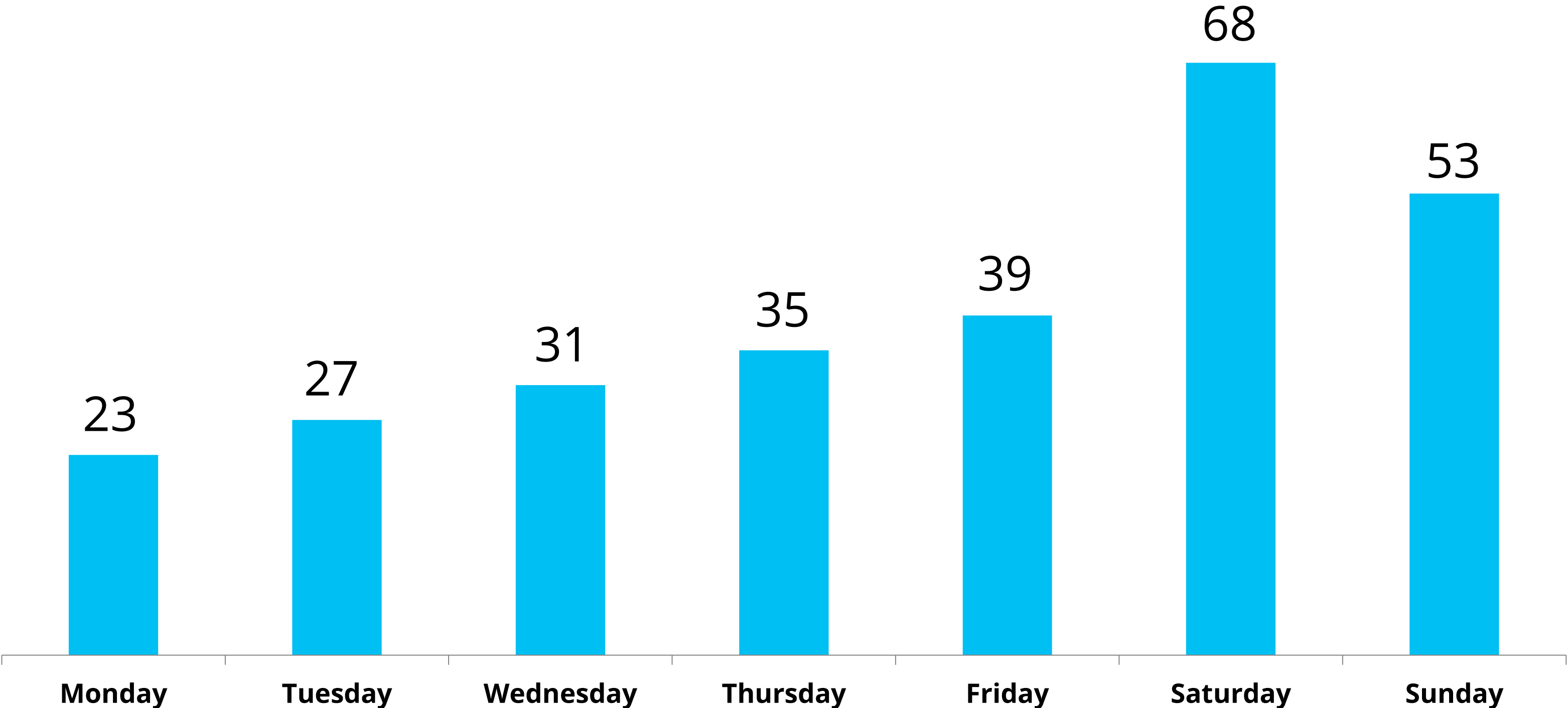
Source: VAB analysis of Nielsen NPower, Total Day, live originals/premieres only, January 1 – December 31, 2019; includes Spanish language networks; excludes regional sports networks, local broadcast airings and digital airings of sports through MVPD / network TV apps. MVPD subscriber costs based on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

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On average, each day of the week features at least **23** live sporting events throughout the year with a skew towards weekends

**Average # of National Live Sporting Events Each Day of the Week**

CY 2019

















Source: VAB analysis of Nielsen NPower, Total Day, ad-supported cable TV + broadcast TV, 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.

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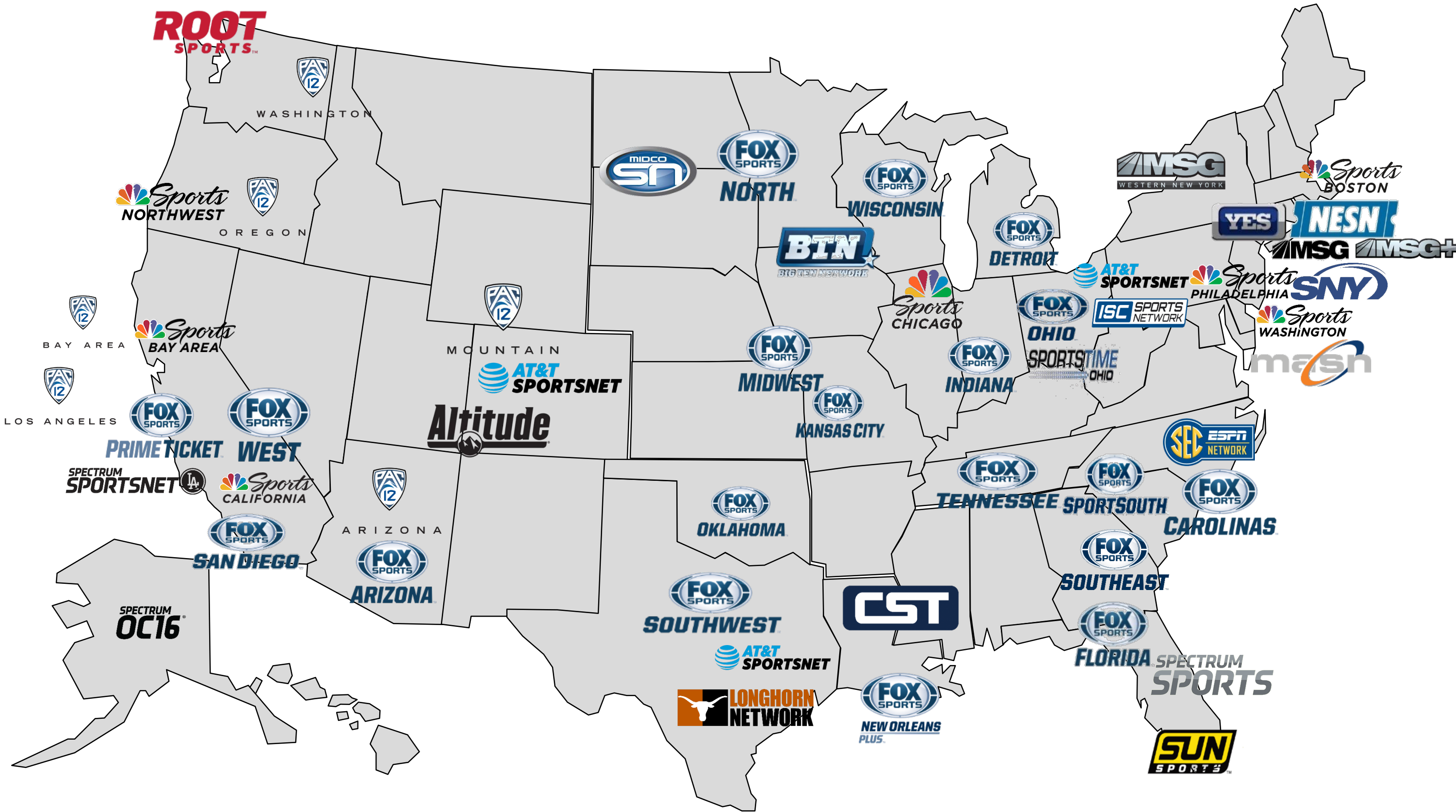


# Popular 'Branded' Live Sports Series 'Own' Specific Days Throughout The Year

## *Sampling of Signature Live Sports Series*

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
    	    	    	    	   	       	       

In addition to national TV, Regional Sports Networks, which each broadcast hundreds of live professional and collegiate sporting events annually, provide coverage of local teams throughout all major DMAs

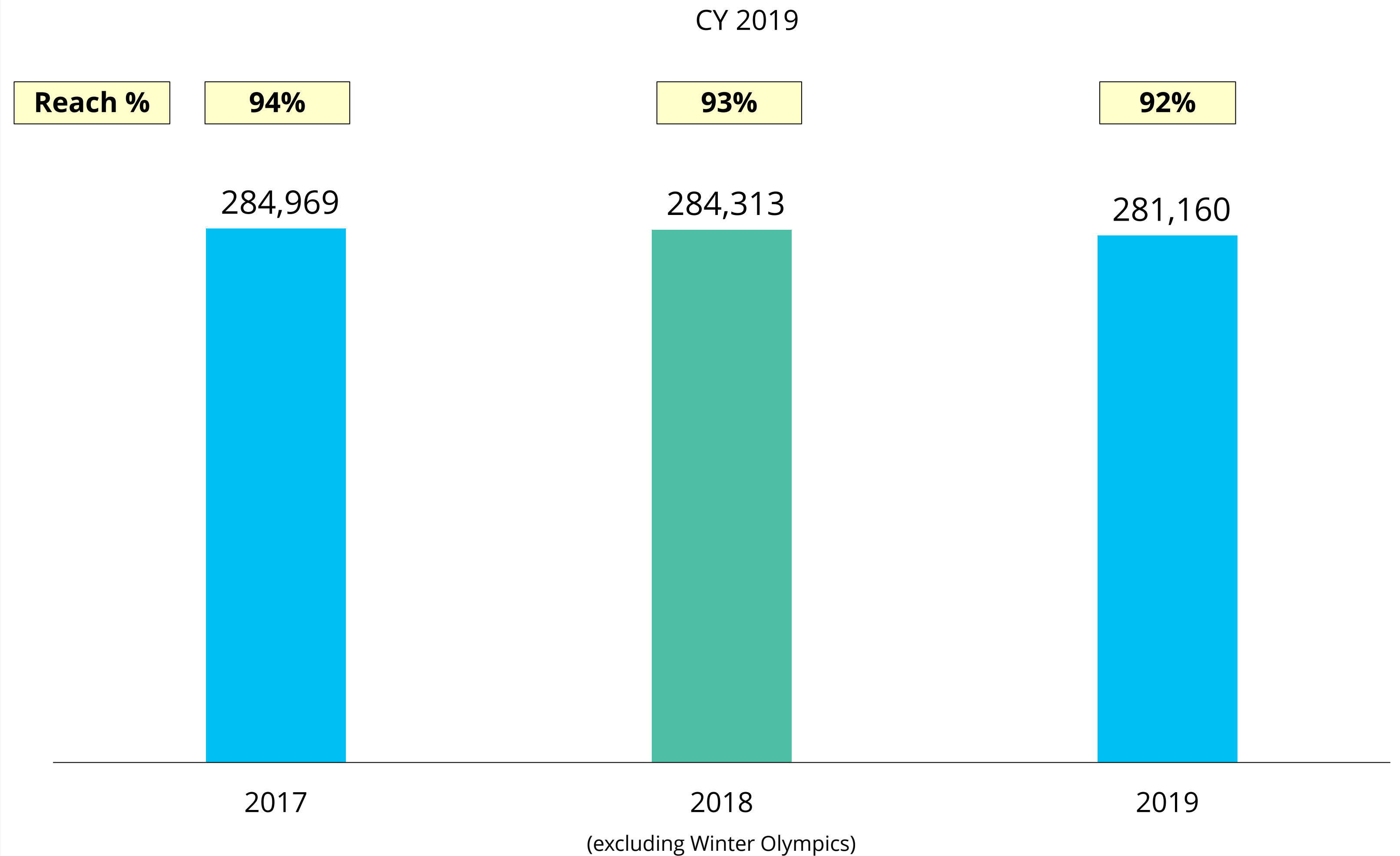




Viewers Embrace Sports Content On TV

Live sports are universal and one of the most popular genres across demographics with a reach of over **281 million viewers**, which equates to **92%** of the population

### P2+ Annual Cume Reach (000) for National Live TV Sporting Events



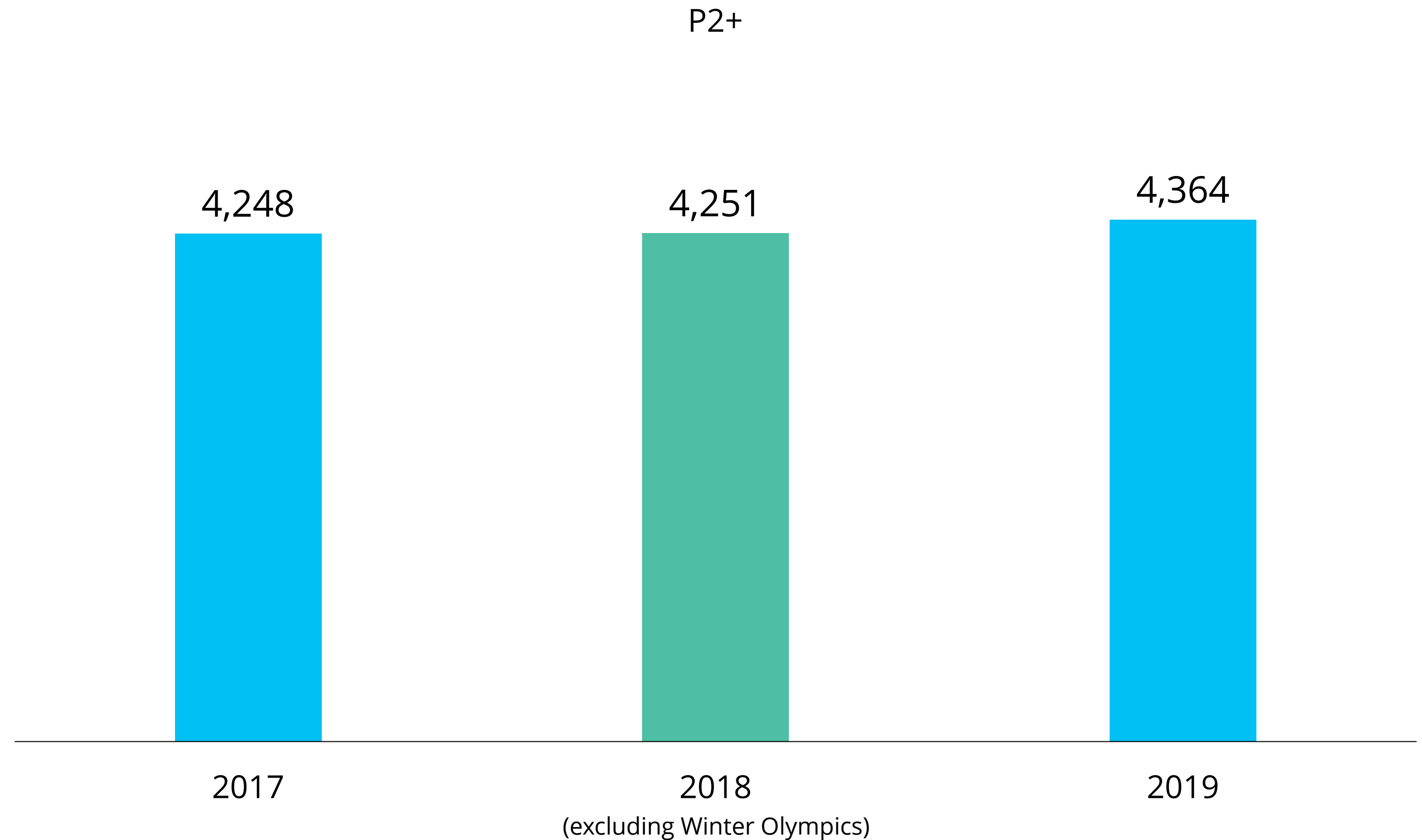
Source: VAB analysis based on data from Nielsen NPower R&F Program Report, Total Day, Live+7, P2+, ad-supported cable TV + broadcast TV, based on calendar year; includes Spanish language networks; excludes regional sports networks, local broadcast airings and digital airings of sports through MVPD /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

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On average, these 281 million viewers devote over **6 hours each month** to watching live sports, a 3% increase vs. 2017.

Collectively, this adds up to nearly **22 billion hours** of live sports watched on TV annually.

### 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, based on calendar year; 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.

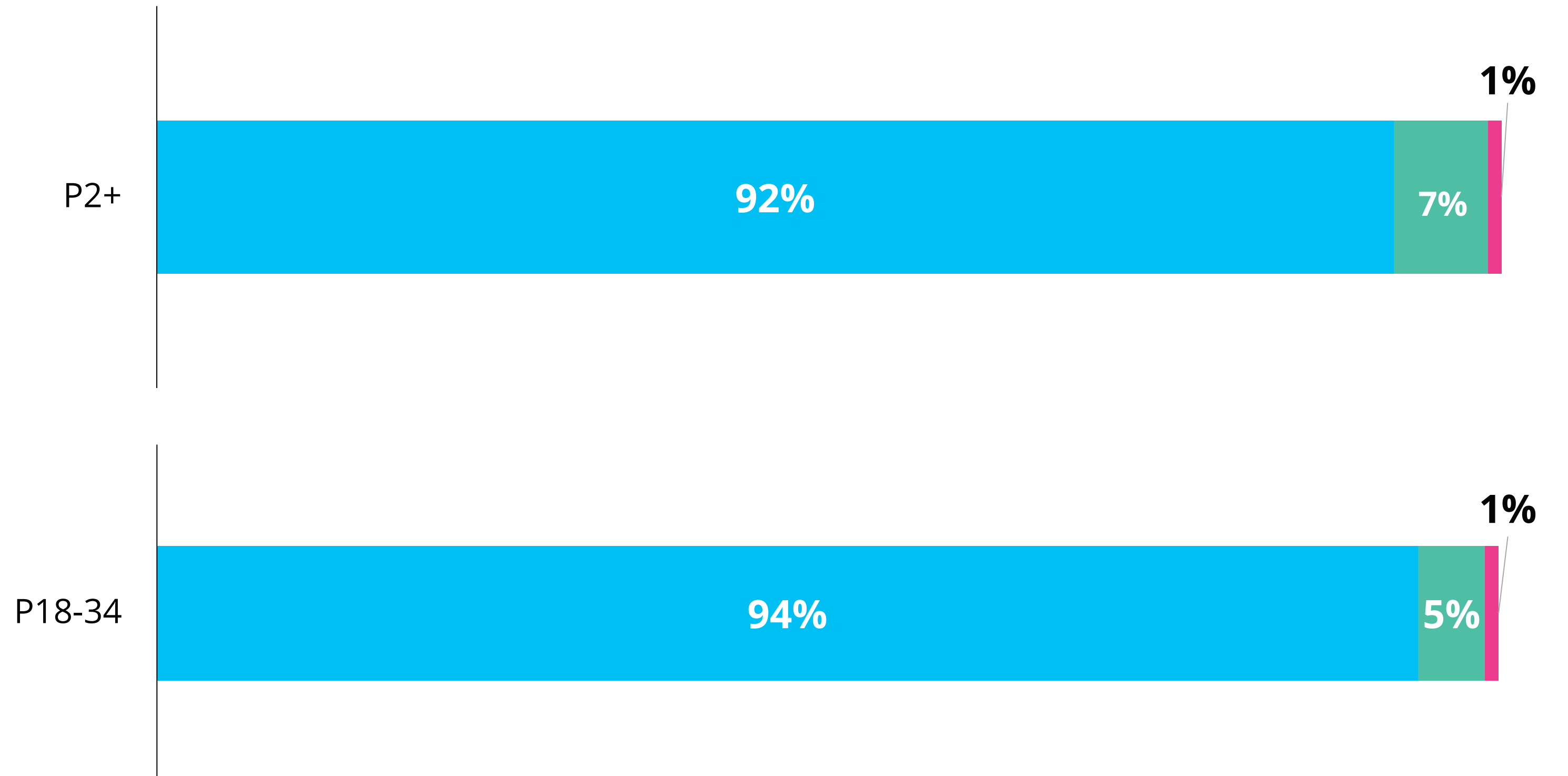
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The excitement and interest that fans have around sports means there's an inherent immediacy to TV viewership – in fact, **99% of viewing** is done either live or live + same day

### National Live TV Sporting Events: Viewership By Stream

% of Total Viewing Hours, CY 2019

■ Live ■ Live+Same Day ■ Live+7



Source: VAB analysis of Nielsen NPower R&F Program Report, Total Day, P2+ & P18-34, ad-supported cable TV + broadcast TV, 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. Reflects live sporting events only.

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# Speaking of Excitement & Interest, Many Sporting Events Across Leagues Have Been Setting Record-Breaking Ratings Over The Past Year

**Primetime Ratings: Univision Wins With Gold Cup Soccer**

**ESPN's Broadcast of Bowl Games Becomes Most-Watched in System's History**

**2018-19 Report: Amazing College Football Popularity Highlighted by Impressive Ratings and Attendance Data**

**Warriors-Lakers is the highest rated NBA preseason game in ESPN history**

**NBC Sports posts record NHL ratings**

NBC OLYMPICS' PYEONGCHANG COVERAGE DELIVERED MOST DOMINANT WINTER GAMES WEDNESDAY NIGHT SINCE NANCY & TONYA IN 1994

**FOX's coverage of USA vs. France breaks Women's World Cup quarterfinal ratings records**

**Ratings Roundup: National Title Rematch Breaks Seven Year Record; Cowboys-Saints Becomes Most Watched in *TNF* History**

**NBC Triples Live-Streaming Olympics Viewership From 2014**

**Derby finishes with four-year ratings high**

**ESPN2 Posts Highest WNBA Overnight Rating for a Regular-Season Game Since 2011**

**TV viewing habits shows how the NFL is still as dominant as ever**

**NASCAR overnight ratings increase 10 pct., primarily thanks to new Roval**

**NASCAR scores rare multi-year high at Kansas**

**Television ratings for NBA (and NHL) are up, despite familiar narrative**

**FOX Sports Scores Most-Watched World Cup Matchday 14 Since 2006**

**MLS Cup on FOX is Most-Watched Since 1997**

**NFL Draft Pulls Record Ratings for Second Straight Year**

**ESPN Grows Audience in Second Quarter; Prime Time up 10 Percent**



## **One-Two Punch:** Sports Engagement Extends Across Screens

# TV Brands Extend Their Reach & Engagement Through Live Streaming On Digital Platforms Which Allows Additional Sports Viewing Anywhere

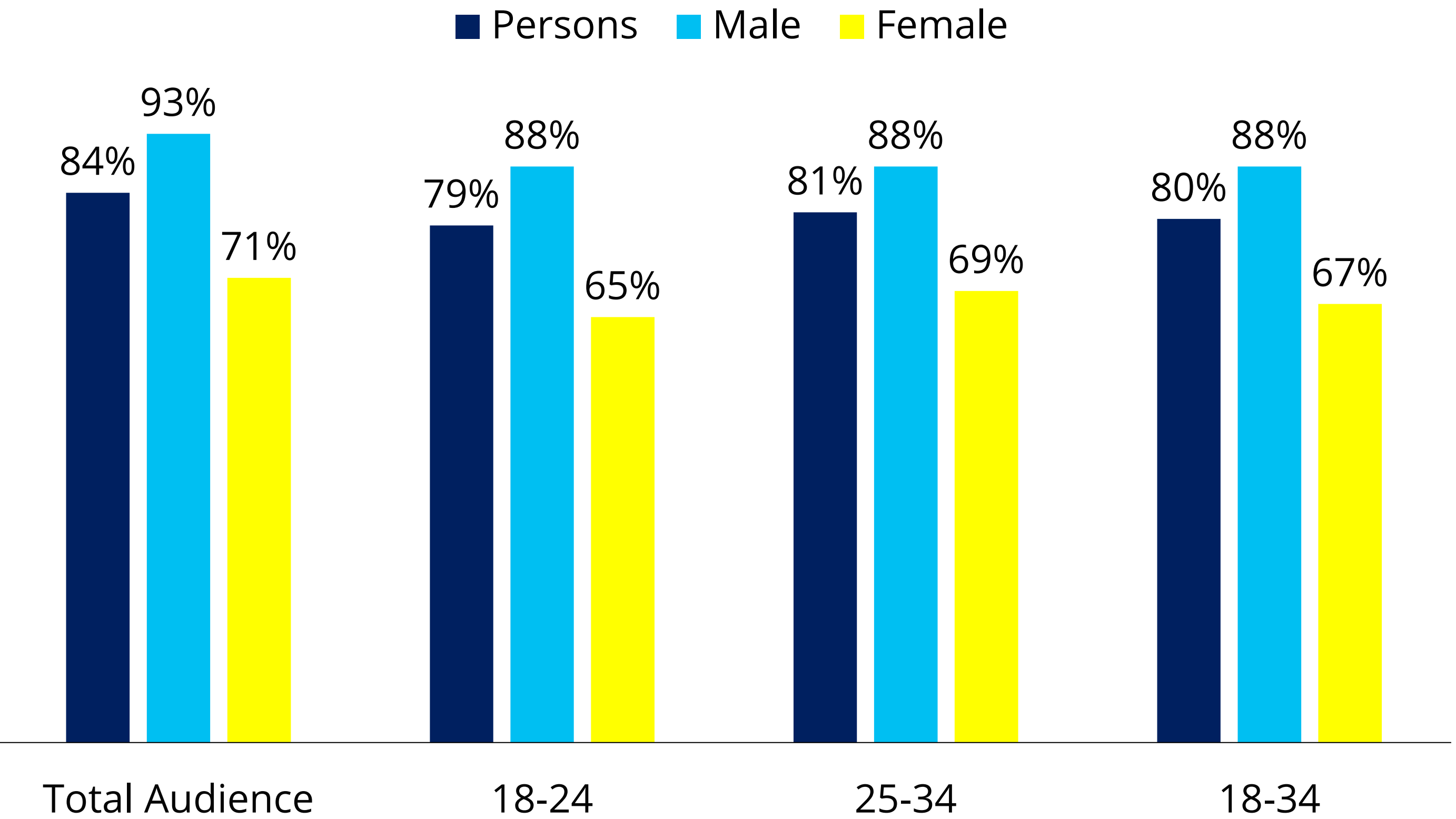
## Sampling of Live Streaming Mobile Apps



Over **80%** of fans who go online for sports content visit at least one TV-branded digital sports platform monthly.

Younger adult males are even more likely to visit a TV-branded sports platform, while at least **two-thirds** of younger females also visit these platforms.

**TV-Branded Digital Sports Platforms' Cume Reach**  
**as a % of Sports Category Digital Universe**  
December '19



Source: VAB analysis of Comscore Audience Duplication, multiplatform (web and mobile), December 2019, Total Audience (Desktop 2+, Mobile 18+), 18-24, 25-34, 18-34, unduplicated unique visitors based on a comScore-defined sports category vs. custom created Sports TV Branded Website subcategory which includes digital platforms such as ESPN.com, Fox Sports, CBS Sports & NBC Sports.

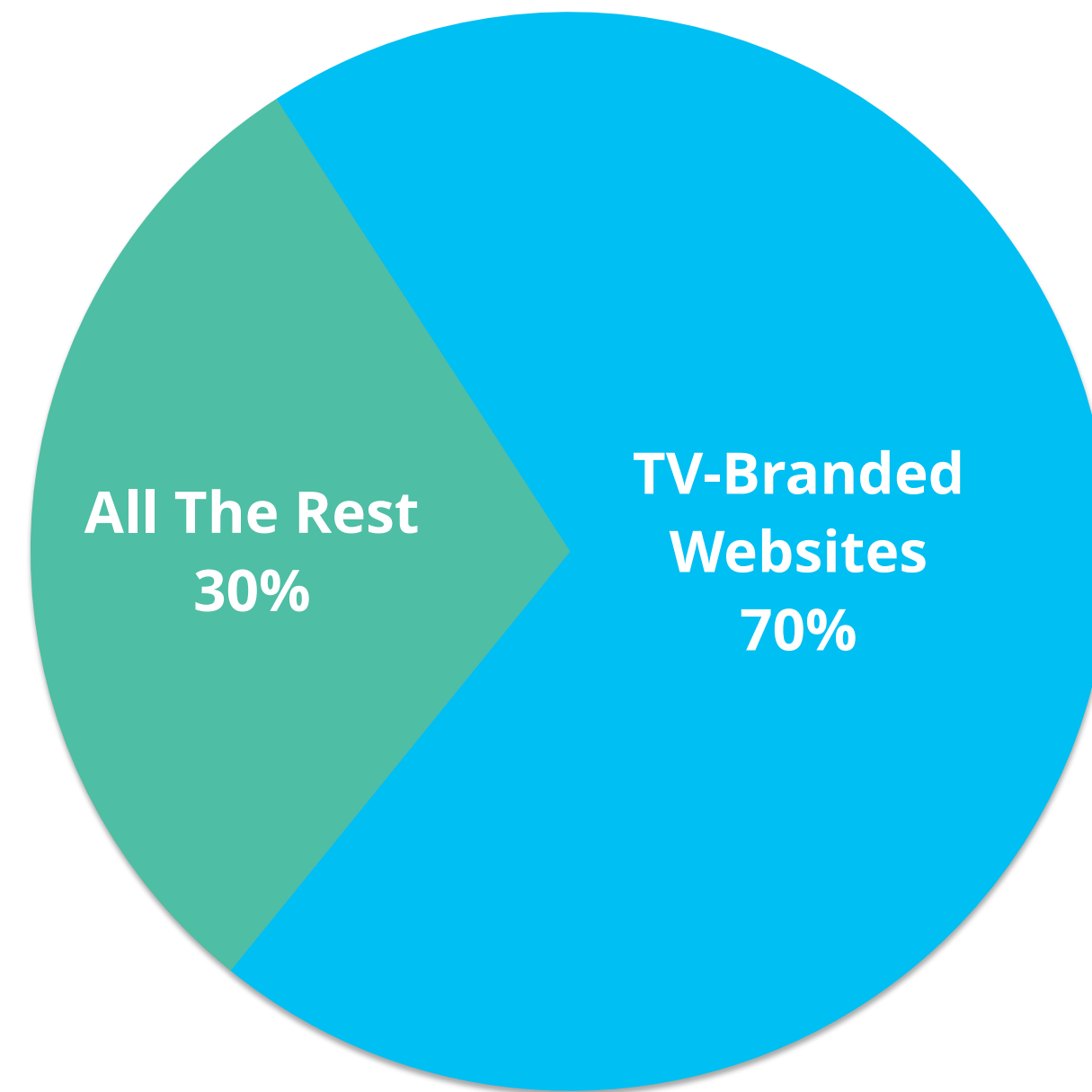
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**Three-quarters** of time spent online with sports content by adults 18-34 is with TV-branded digital platforms

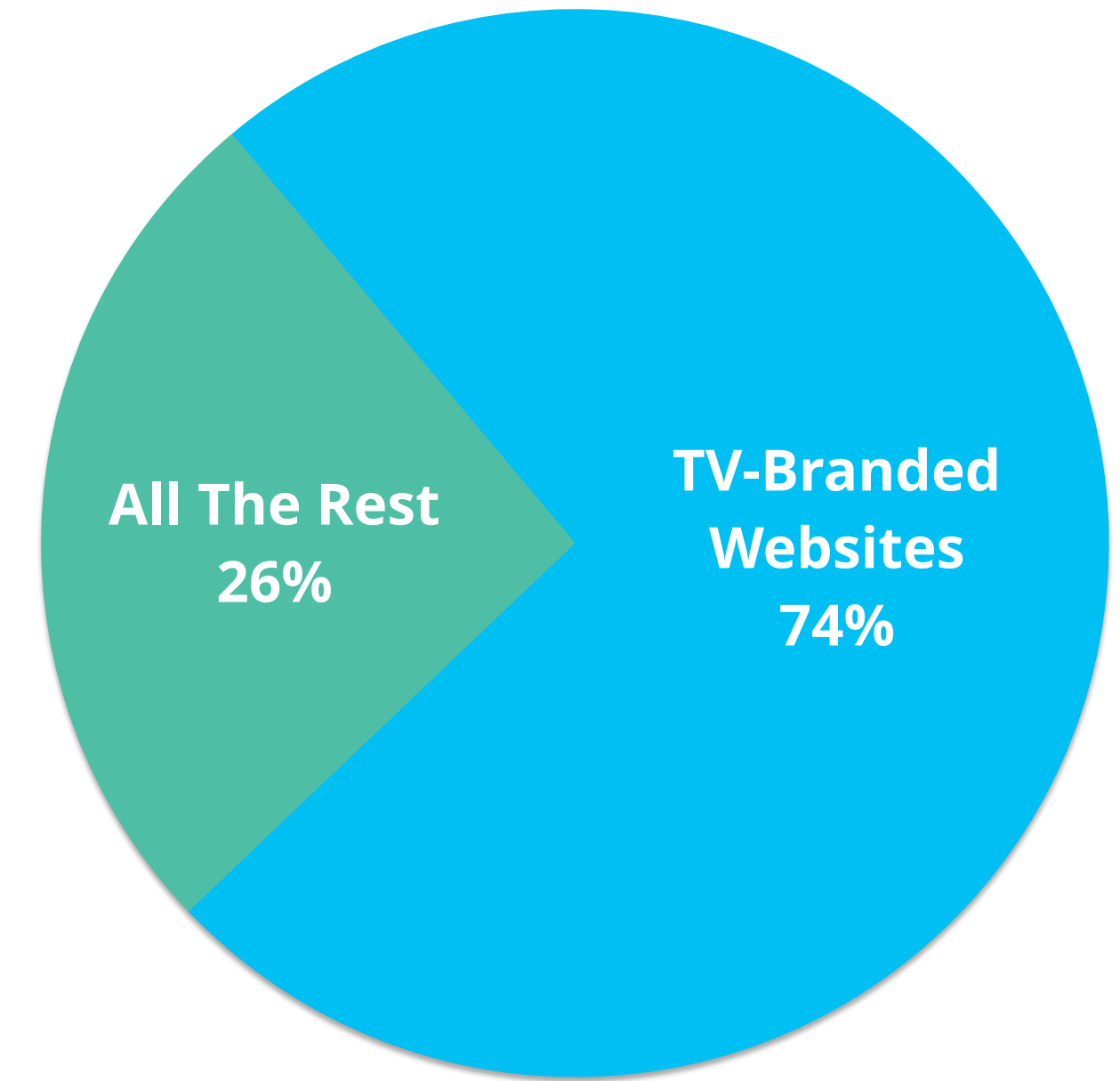
**Sports Category: % of Total Minutes Viewed Online**

December '19

Total Audience



P18-34



Note: "All The Rest" reflects non TV-related websites like USA Today Sports, SB Nation, Reddit Sports, Deadspin.com, Whistle Sports, etc

VAB analysis of Comscore Audience Duplication, multiplatform (web and mobile), December 2019, Total Audience (Desktop 2+, Mobile 18+) & P18-34, Total Minutes based on a comScore-defined sports category vs. custom created Sports TV Branded Website subcategory which includes digital platforms such as ESPN.com, Fox Sports, CBS Sports & NBC Sports.

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# In Fact, The Top 5 Digital Sports Platforms For Adults 18-34 Each Month Throughout The Year Are TV-Related Brands

Top 5 Sports Digital Platform Rank By Total Minutes Viewed (P18-34)



Source: VAB analysis of comScore MediaMetrix, multiplatform media trend data, January-December 2019; sports category, P18-34, excludes non-sports media brands.

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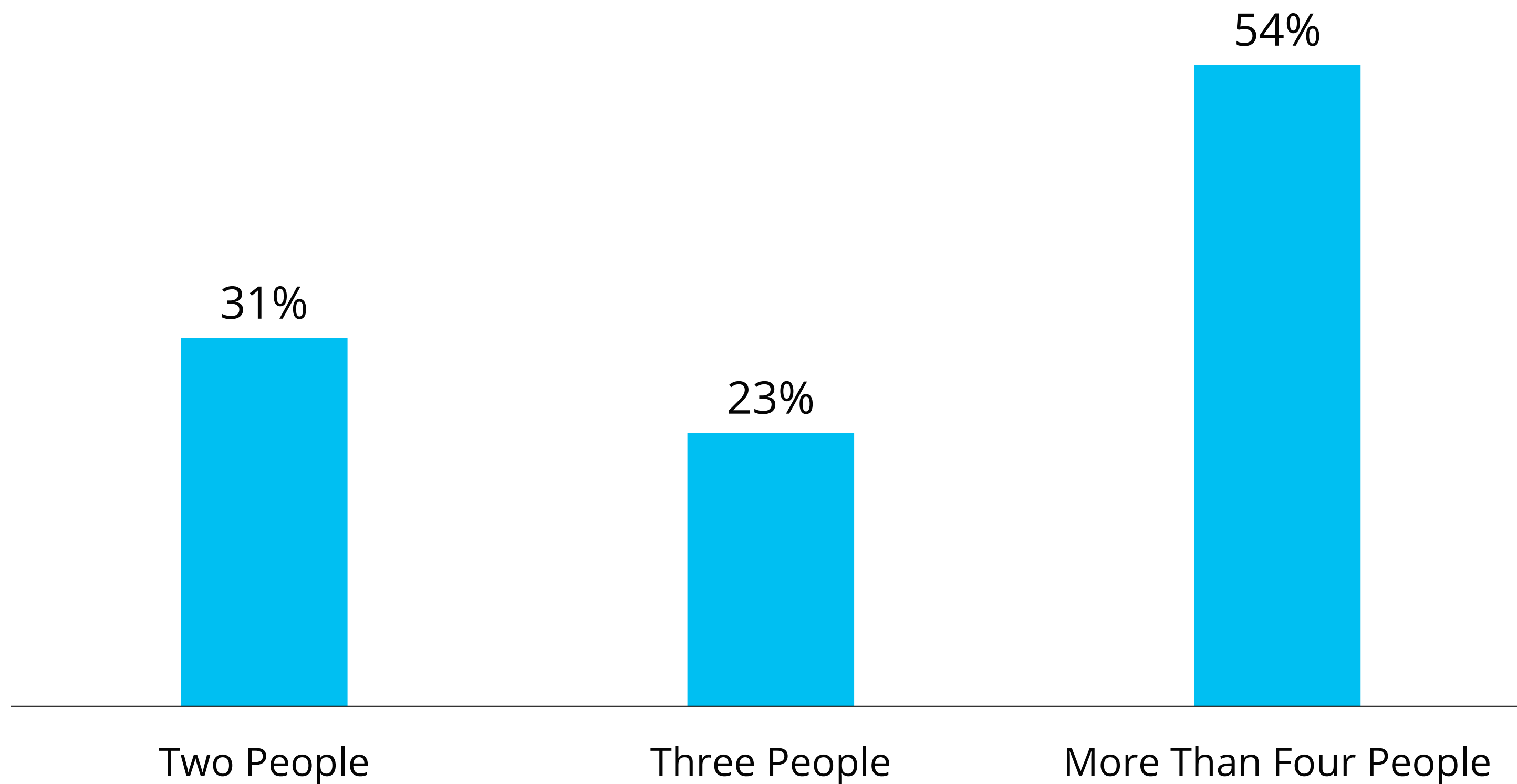
## Away Games: Building Audiences Through Out-Of-Home Viewing

Out-Of-Home viewing of live sports on TV is an inherently communal, social event where friends and family gather to root on their favorite teams or use the time as an occasion to socialize with each other during their busy lives.

With a 55% male / 45% female breakdown, OOH sports viewing is rather balanced with just a slight male skew.

### How Many People Do You Watch Sports With Out-Of-Home?

Adults 18+



15% of males and 11% of females watch sports out-of-home with more than 10 people

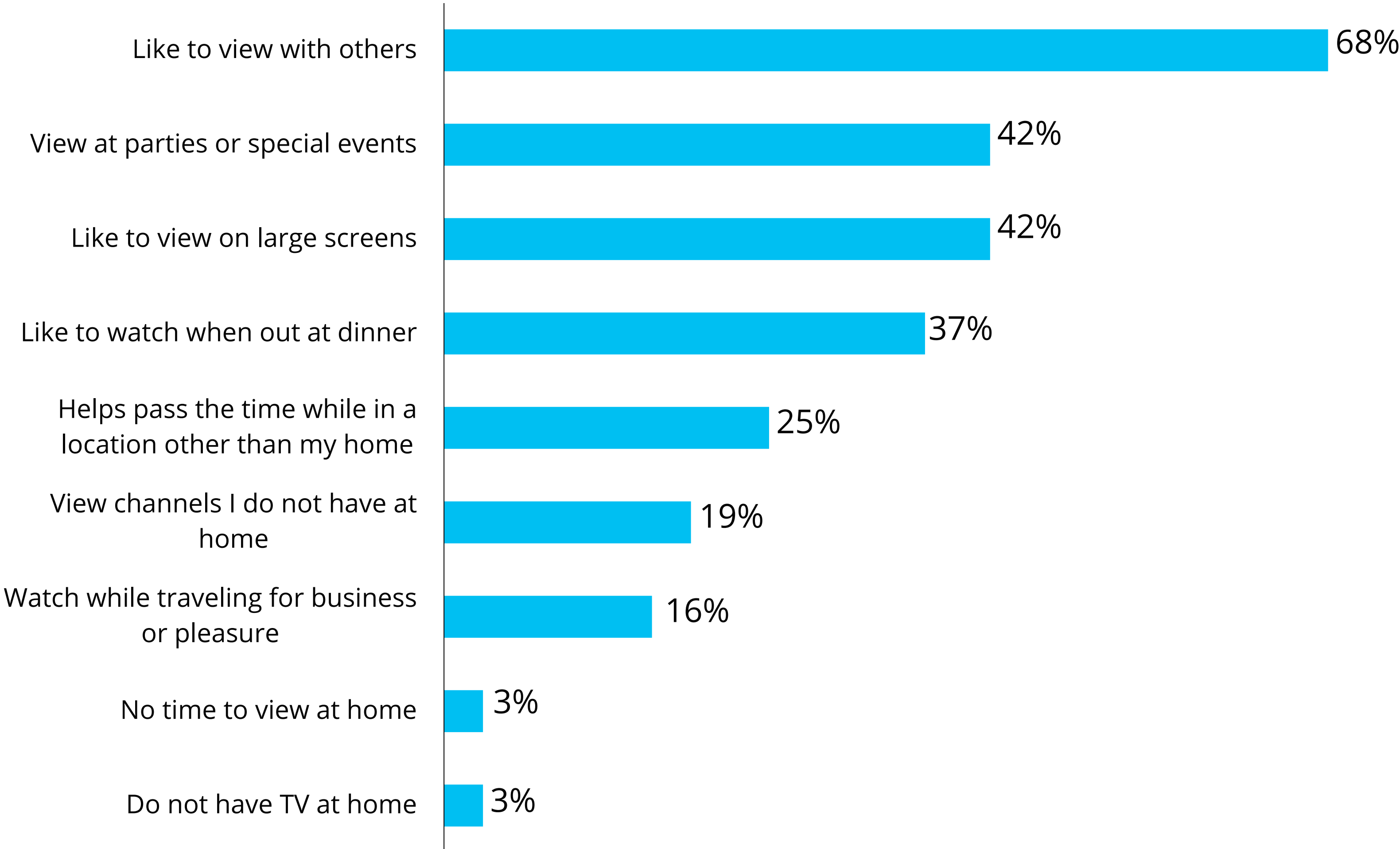
Source: VAB analysis of Nielsen Fall Sports, Game On: Driving Brand Engagement and Co-Viewing On Linear TV With Out-Of-Home Audiences; 2019. Reflects multiple responses chosen from respondents in Nielsen's Out-of-Home Fall Sports Location Survey, General Population (10/29/18-10/31/18). Survey participants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

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In addition to creating a festive atmosphere among family, friends and fellow fans and providing a viewing opportunity for those 'on the go,' out-of-home also builds additional exposure for linear TV sports by reaching people who may not ordinarily watch sports at home

### What are Reasons for Viewing Sports Out-Of-Home?

Adults 18+



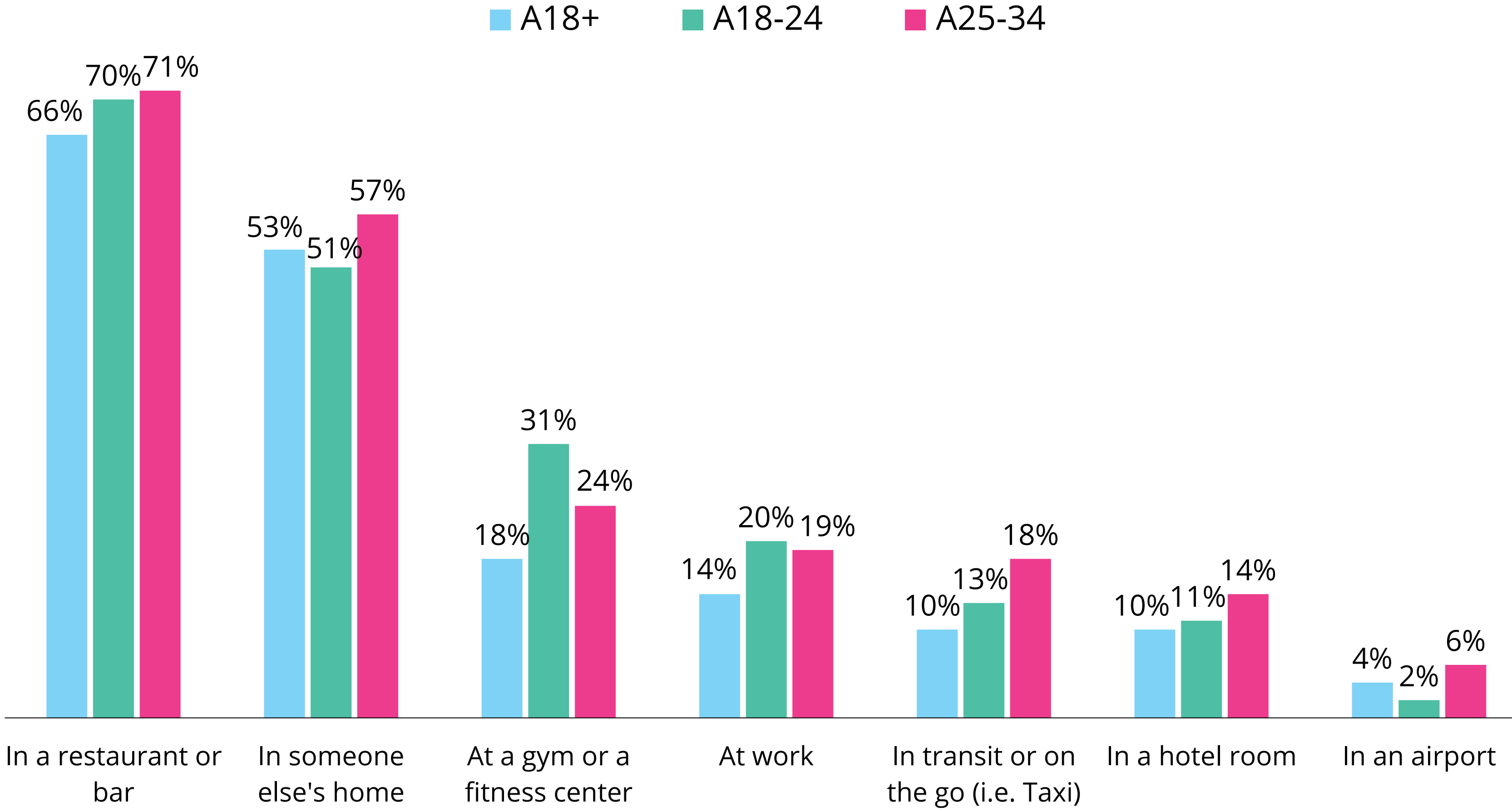
Source: VAB analysis of Nielsen Fall Sports, Game On: Driving Brand Engagement and Co-Viewing On Linear TV With Out-Of-Home Audiences; 2019. Reflects multiple responses chosen from respondents in Nielsen's Out-of-Home Fall Sports Location Survey, General Population (10/29/18-10/31/18). Base = A18+ Watch regularly OOH.

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The out-of-home viewing opportunities for sports TV is nearly limitless, especially for younger adults who are comfortable watching wherever they are – whether it’s at a restaurant or bar, at a friend’s house, at the gym, in transit, while traveling or during downtime at work

**Where Do People View 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). Base = All respondents 18+. Respondents can select multiple locations.

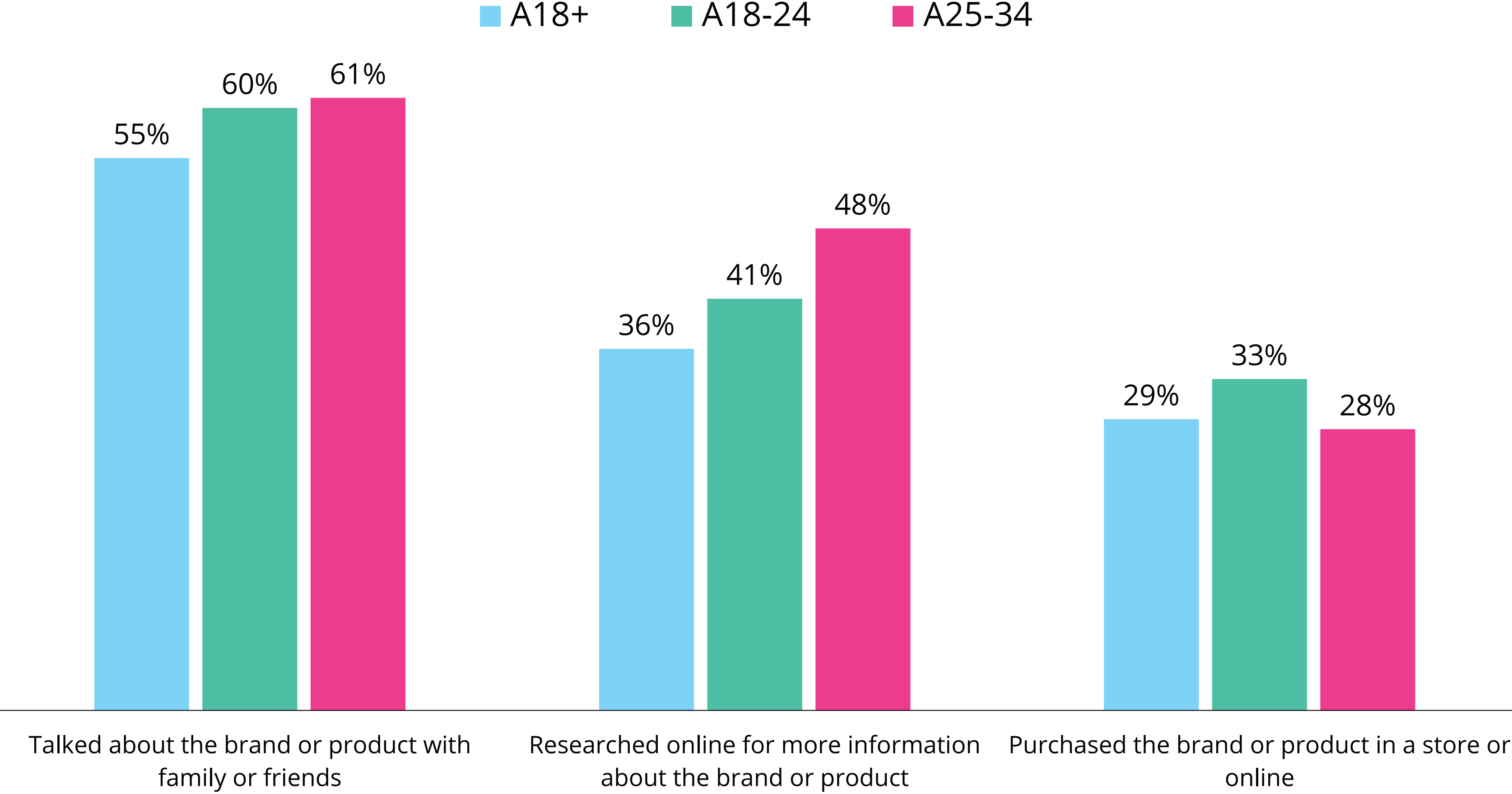
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The communal aspect of out-of-home viewing is also effective for driving engagement around ads airing during live sporting events.

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). Base = Respondents who are likely to notice advertised brands while watching OOH.

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## Key Takeaways

Watched by 96% of fans and preferred by 72%, home viewing of live sports offers an inexpensive, and always available, front row seat to over 14,100 nationally televised sporting events each year

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Live sports watched on national TV delivers 281 million viewers with an aggregated time spent of nearly 22 billion hours annually

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Sports are nearly DVR-proof, even among younger demos. 94% of sports viewing by adults 18-34 is done live and 99% is either live or live + same day

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80% of adults 18-34 visit at least one TV-branded digital sports platform monthly which allows for additional viewing and streaming of live sports anywhere

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Out-of-home viewing also builds additional exposure of multiscreen TV by reaching people who may not ordinarily watch sports at home and these people are receptive to ads as well – 33% of adults 18-24 have purchased a product they saw advertised while watching sports outside of the home

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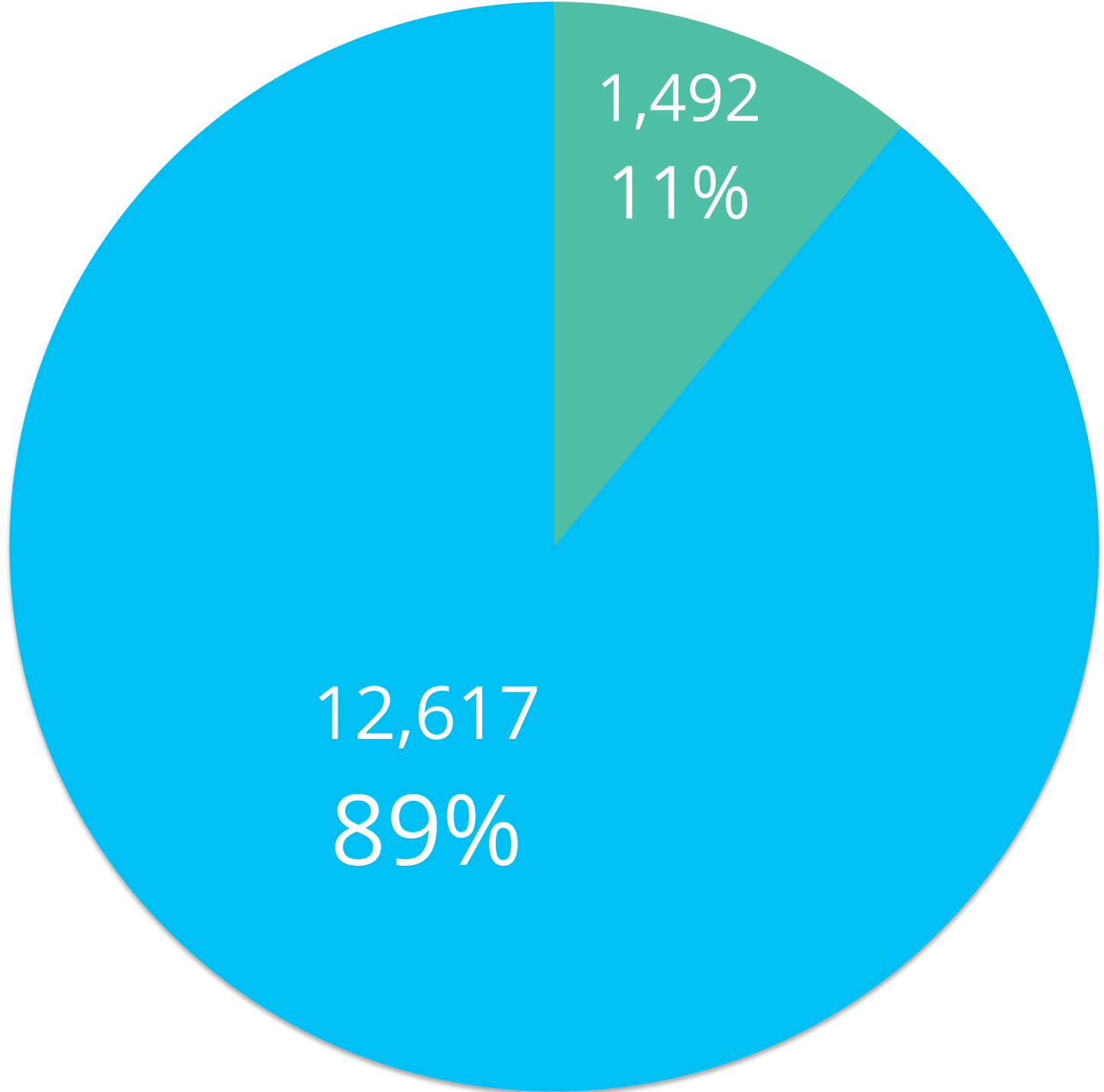


**Appendix:** A Deeper Look Into Sports TV Programming

Among the over **14,100** live sporting events shown on national TV annually, **89%** air on ad-supported national cable TV

**# of National Live Sporting Events**

CY 2019



■ Broadcast TV    ■ Ad-Supported Cable TV

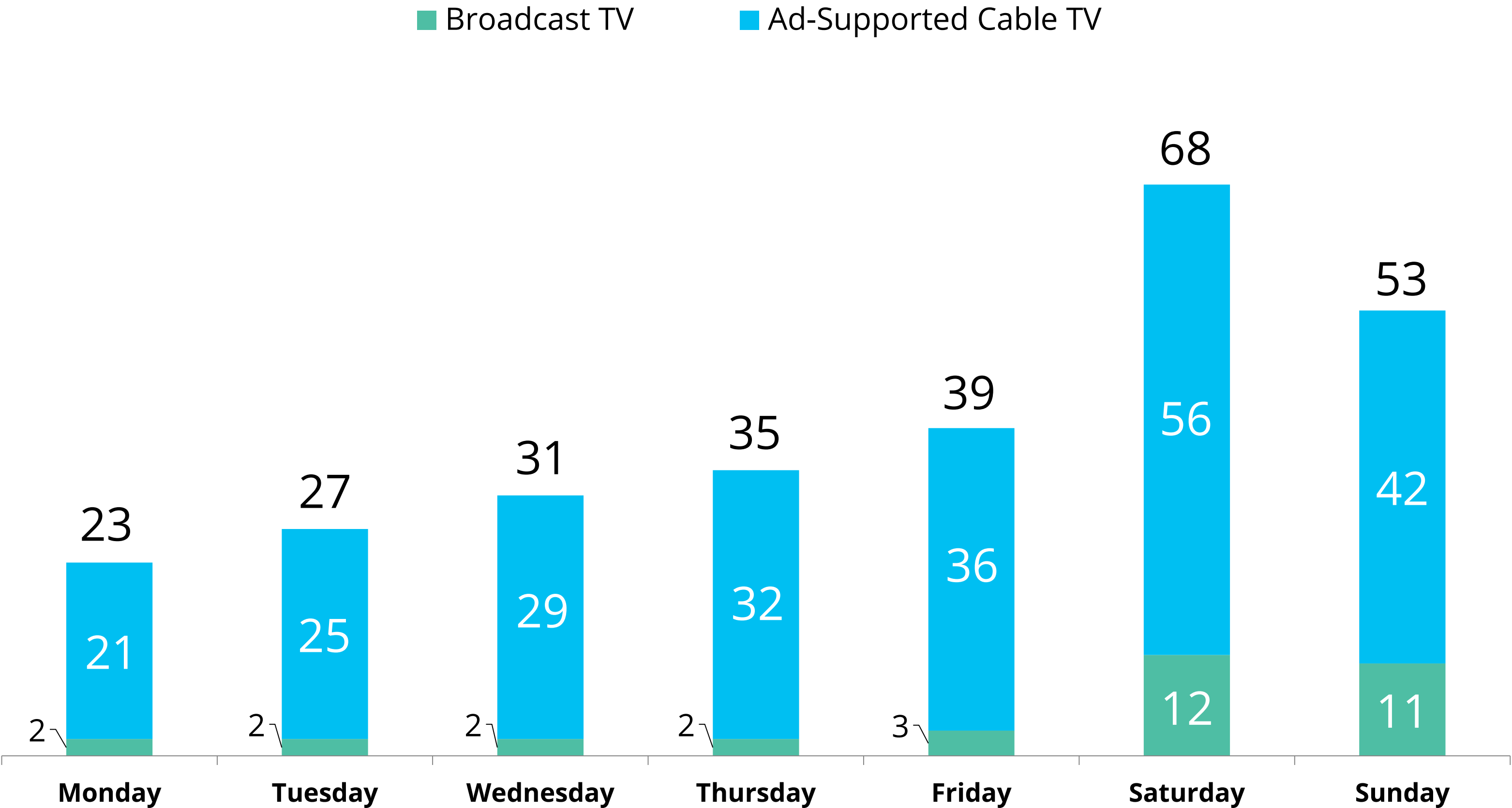
Source: VAB analysis of Nielsen NPower, Total Day, live originals only, January 1 – December 31, 2019; includes Spanish language networks; excludes regional sports networks, local broadcast airings and digital airings of sports through MVPD / network TV apps.

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Ad-supported national cable TV makes up a large majority of live sporting events every day of the week

**Average # of National Live Sporting Events Each Day of the Week**

CY 2019



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.

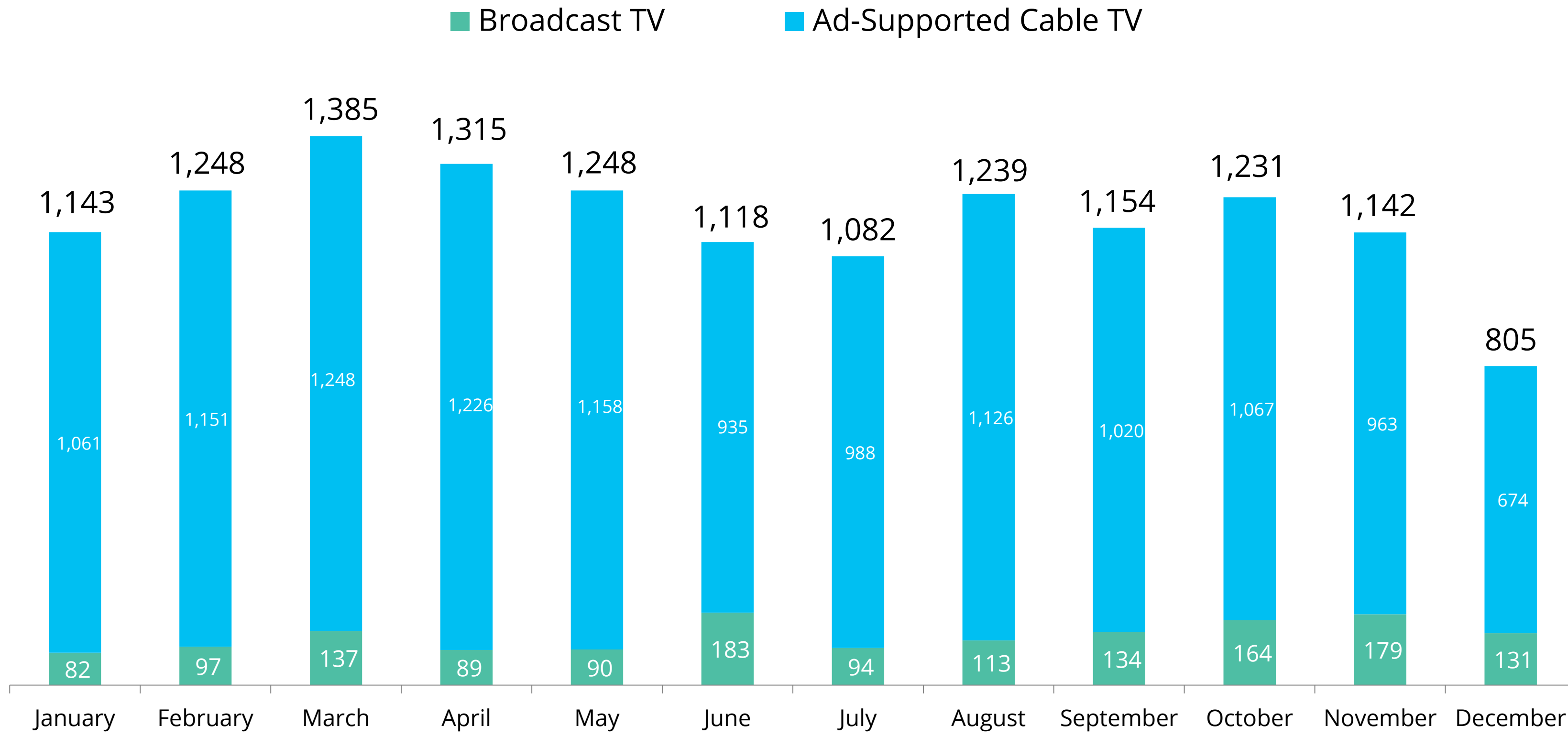
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On average, there are **1,051** live sporting events airing on ad-supported national cable TV each month and available across devices

**# of National Live Sporting Events Per Month**

CY 2019



*Note: Summer is dominated by the MLB, a sport that has the vast majority of its games airing on RSNs which are not reflected in the above chart.*

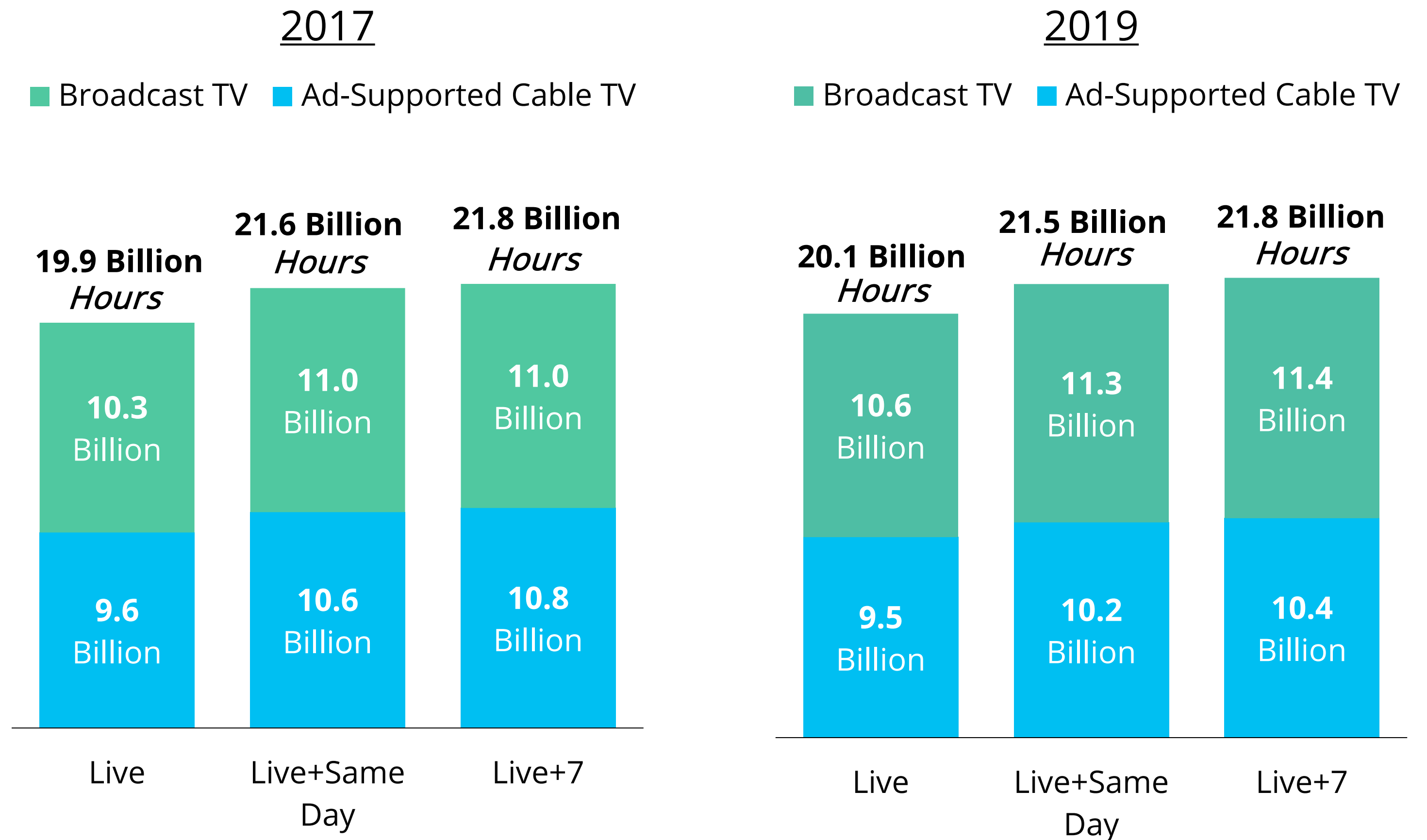
Source: VAB analysis of Nielsen NPower, Total Day, live originals/premieres only, January – December 31, 2019; includes Spanish language networks; excludes regional sports networks, local broadcast airings and digital airings of sports through MVPD / network TV apps.

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Time spent viewing live sporting events between national broadcast TV and ad-supported cable TV is fairly even with a slight skew towards broadcast TV (52% share) which is driven by NFL games

## National Live TV Sporting Events: Total Cume P2+ Hours Viewed

Ad-Supported Cable TV vs. Broadcast TV  
CY 2017 & 2019



Source: VAB analysis of Nielsen NPower R&F Program Report, Total Day, P2+, based on calendar year; 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.

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Ad-supported cable TV networks are projected to invest almost **\$20 Billion** on sports programming by 2022

**Ad-Supported Cable TV Sports Programming Costs Trend**

\$ in Millions



Source: VAB analysis of S&P Global Intelligence, Kagan, 2020: programming cost estimates reflect ad-supported cable TV & Regional Sports Networks; excludes programming costs by broadcast networks.

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