

# DIGITAL TRANSFORMATION & SPORT ECONOMY

DICEMBRE 2018

# SIZING KEY TECH TRENDS

## #3: content continues to shorten in line with attention



Attention spans are shortening



More things are competing for consumer attention



Media consumption is shifting to mobile



Younger generations are watching less TV and long-form sport

Source: Nielsen Global Trends 2018

## HOW THIS IS IMPACTING SPORT ECONOMY?

### SPORTS DISTRIBUTION

### CONTENTS STRUCTURE

### PARTNERSHIP GOALS

- New offering from tech giants and OTT players is sustaining Sports Media Rights Industry
- Right Holders, as Sponsor Brand, are becoming “broadcasters” themselves
- RHs leveraging higher data accessibility to increase contents customization
- Stronger relevance of *personalities*, both to reach market niches and to convey impactful CSR programs
- More frequent adoption of “incentive-based” partnership model
- Smart RHs are increasingly looking for Tech brands & partnerships to boost communication effectiveness

# THE “NEW ERA” OF CONTENT

## SHORT VS LONG FORM

- As attention spans are shortening, Media and advertising continue to respond with short content formats:
- But consumer appetite for high-quality, long-form content also remains strong

## PERSONALIZED CONTENTS

- RH, brands and platforms leveraging higher user data accessibility and knowledge to increase tailor made contents.

## SOCIAL IMPACT

- Highly influential personalities leveraging outstanding reach and engagement to drive impactful messages.

## SHORT-FORM CONTENTS ARE BOOMING

**Attention spans are down to 8 seconds – less than a goldfish!**

**Media and advertising continue to respond with short content formats:**



### **6-second video ads are increasingly popular on TV and online**

- Fox says the rate for 6s ads during its sports broadcasts is equal to that for 15s slots



### **House of Highlights has 10m+ followers on Instagram**

- “Young people are spending more time with House of Highlights on Instagram than Bleacher Report at times” Rory Brown, president of Bleacher Report (owns HoH)

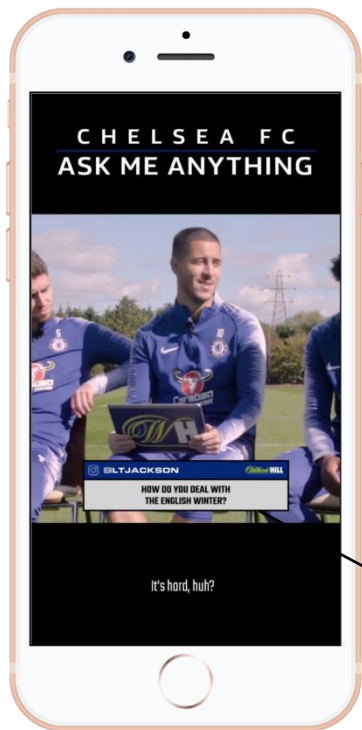


### **‘Stories’ are booming on Snapchat and Instagram**

- Instagram Stories has 400m daily active users, two years after launch

Source: Nielsen Global Trends 2018

# CHELSEA #ASKMEANYTHING VIA INSTAGRAM TV



CHELSEA FC  
ASK ME ANYTHING



The 1' and 32" video *Ask me anything* is a part of the partnership between Chelsea Fc and William Hill. Users can ask to the players questions about anything and receive the answers directly from their idols, discovering unknown aspects of their life.



**766.9K**

VIEWS OF THE CONTENT



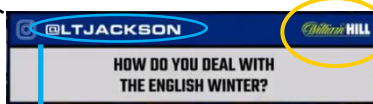
**30.5K**

LIKES RECEIVED



**664**

COMMENTS POSTED



The handles of the users appears in evidence in the QUESTION BOX.

The commercial partner has its own spaces during the video

But consumer appetite for high-quality, long-form content also remains strong.

**High-quality sports documentaries are enjoying a boom, driven by:**

- SVOD boom and the boxset/binge-watching trend
- Novelty for viewers of rare, behind-the-scenes access to sports stars



**Amazon's All or Nothing series:**

- New Zealand All Blacks
- Arizona Cardinals
- Manchester City
- LA Rams
- Dallas Cowboys
- Michigan Wolverines



**Netflix:**

- First Team: Juventus
- Sunderland Til I Die
- Boca Juniors Confidential
- Formula 1

# DATA-DRIVEN APPROACH TO TAILORED CONTENTS

Consumers have come to expect  
**personalized content** thanks to:



Social media, Netflix, Spotify and other web/tech services that employ user data to deliver tailored experiences.



Rise of mobile as primary media interaction device – encourages development of personalized, 1-to-1 UX.



Rights holders that are establishing a direct relationship with users leveraging players and technology.



x



Sao Paulo will launch an official club account on Spotify where fans can see, in real-time, which tracks and albums their favorite players are listening to.



# LEBRON JAMES: A PLATFORM HIMSELF

The most influential athlete in America has handed over his Instagram page to a young generation of activists giving them the opportunity to share their message and start a dialogue with his 45 million followers.



*"If even one kid saw that message, I'm happy. Now he knows he's not alone, he's not the only kid out there, and he has hope and he has other people who care for him."*

Cory Nieves, 14 years old



*"So when I'm out there talking about feminism, I knew I had to do it in a specific angle, so I said you can be a man and also fight to dismantle sexism because that's who women really need as allies."*

Jen Winston, activist

Replied to your story

Just saw your story on LeBron James acc. Thankyou for your words..ssly it actually changed my thinking of what an activist can do ! God bless you keep up the good work! 🙏💖



# PARTNERSHIP GOALS

# TWO-WAY RELATIONSHIPS: TECHNOLOGY PARTNER DEALS

SAP, Microsoft and IBM have been prolific in VIK deals providing sports with technology, data and CRM capability. The brands are able to tell strong stories about addressing real business challenges.



## **SAP sports partnerships**

WTA, City Football Group, FC Bayern Munich, German Football Association, McLaren, NBA, NHL, NY Giants, NY Yankees, U.S. Sailing, San Francisco 49ers



## **IBM sports partnerships**

U.S. Open, Wimbledon, The Masters, Mercedes-Benz Stadium, Pebble Beach



## **Microsoft sports partnerships**

Real Madrid, Special Olympics, NFL, NASCAR, PGA Tour, Seattle Reign, Hendrick Motorsports, Renault Sport Formula 1 Team

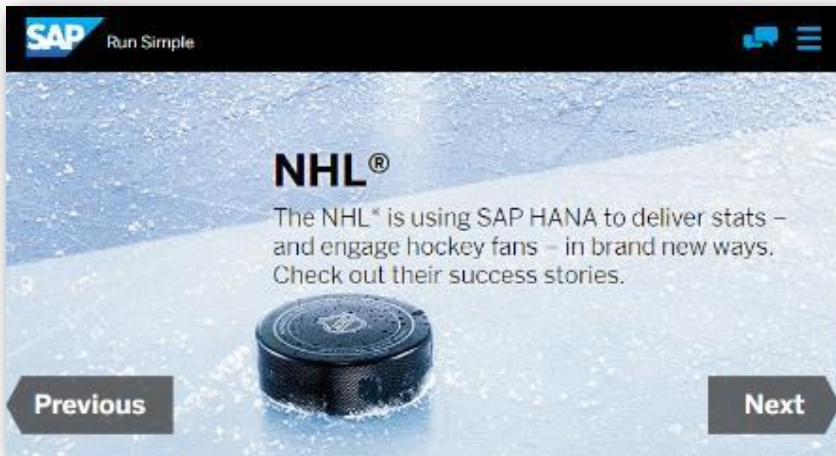


# SPONSORSHIPS ARE BECOMING MORE TWO-WAY

## Industry Case Study

## NHL and SAP

NHL uses SAP's HANA service to deliver statistics to fans



WINS WITH SAP HANA

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**100 years**  
worth of NHL® statistics unlocked

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**25%**  
increase in new visitors since new stats section was launched

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**45%**  
increased time and engagement on site

SAP is able to tell this story using rich content: video, graphics, feature articles

### DELIVERING INTERACTIVE STATS TO HUNGRY FANS

Since its first puck drop in 1917, the NHL® has hosted 3,950 playoff games and seen 2.5 million shots on ice. Learn how they're using SAP technology to present hockey stats in ways fans have never seen before.

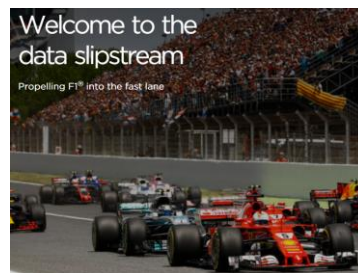
[Watch the 3-minute video](#)

# TECH PARTNER DEALS CONTINUE TO GROW...

Product showcase opportunity justifies the sponsorship business case.

## Tata Communications and F1

- Tata owns one of the world's largest fibre cable networks
- The network transmits video and data from races back to F1's Media & Technology Centre in the UK
- Deal provides F1 with cutting-edge technology, and Tata with a means to showcase it



## SAP and sailing

- SAP says: "Sailing provides the perfect platform for SAP to showcase solutions and help the sport run like never before"
- Partner of properties including Extreme Sailing Series and World Sailing
- Solutions include:
  - Analytics for sailors
  - Race management system for organizers
  - Strategy simulator for teams

# ... AND TO DRIVE PERSONALIZATION

Technology - cloud, data, applications - is critical in delivering personalized content, and rights holders are teaming with tech sponsors to get it, in multi-year, multi-million-dollar partnerships.

## Manchester United-HCL

- Partnership includes new app, revamped website, microsites
- PR refers to: “the ongoing digital-transformation of the club to provide a real-time, engaging, **personalized**, and unified experience to Manchester United’s 659 million global followers”



## Real Madrid-Microsoft

- Wide-ranging partnership included a new fan app that saves personal preferences of users
- A fan of a specific player sees news about that player prioritized
- Other aspects to the partnership: creating data profiles on individual fans; recording player and match data



## INFORMAZIONI SU NIELSEN SPORTS

Nielsen Sports è il principale fornitore di analisi e insight nel settore dello sport, offre la fonte più affidabile di dati indipendenti e olistici del mercato e la visione più completa dei trend e delle abitudini dei consumatori in tutto il mondo ed è il leader globale nella fornitura di soluzioni ad hoc per team, leghe, federazioni, brand, broadcaster ed agenzie. Attraverso il mix di soluzioni che comprendono l'analisi sull'efficacia delle sponsorizzazioni e la competenza relativa ai fan, unitamente alla comprensione che Nielsen possiede in termini di comportamento dei consumatori e della loro fruizione dei media, Nielsen Sports si posiziona in modo unico nel supportare lo sviluppo del business attraverso lo sport. I dati di brand exposure e le misurazioni di Nielsen Sports sono considerati come moneta corrente nel mercato dello sport mondiale. Unendo i dati relativi alle sponsorship con quelli di Nielsen relativi agli acquisti e agli intenti degli acquirenti, Nielsen Sports fornisce a più di 1.700 clienti soluzioni estremamente efficaci e integrate per supportarli nel prendere le decisioni migliori.

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