



NIELSEN SPORTS

WORLD FOOTBALL REPORT 2018

INTRODUCTION



Glenn Lovett
Global Managing
Director,
Nielsen Sports

With the 2018 FIFA World Cup upon us, Nielsen Sports has delved into its data for some fresh perspectives on the world's biggest sport.

Football's extraordinary reach into countries and cultures around the world makes it unequaled among sports in terms of value to media and sponsors. A survey of 18 major markets shows the sport garnering powerful interest in more than 40% of the population, streets ahead of its nearest rival sports.

For television media, this translates into mega audiences and commensurate rights fees. On social media, football's stars are generating world-beating follower numbers and engagement, out-punching the biggest celebrities from music, film and other sports.

“FOOTBALL'S EXTRAORDINARY REACH INTO COUNTRIES AND CULTURES AROUND THE WORLD MAKES IT UNEQUALED AMONG SPORTS”

Brands are spending ever-increasing amounts to associate with football's blue-chip properties. And as figures in this report show, football fans, often characterized as hostile to commercialization of their sport, are actually more understanding and accepting of sponsorship than the general population.

Football is hugely significant in some of the big global trends sweeping through sports, entertainment and society, such as increasing gender equality and the video gaming boom. Female football fans and competitions are becoming more significant with every passing year. In gaming, the likes of EA Sports and FIFA are tapping into huge interest among football fans by developing compelling new esports formats.

If you are in the business of sports, it is essential to understand football's fans, properties, media and sponsors. Read on to enhance that understanding.

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Note: All monetary values have been converted to U.S. dollars at June 2018 rates (\$1 = € 1.31)



1

E BRAZIL

WORLD CUP
RUSSIA 2018
BRAZIL

ROBINHO

Brazil fan taking a "selfie" in Dhaka, Bangladesh, on May 31, 2018.

THE FANS

HOW BIG IS FOOTBALL?

Football's status as the world's biggest sport is uncontested. But just how big is it, and how does it stack up against other big sports?

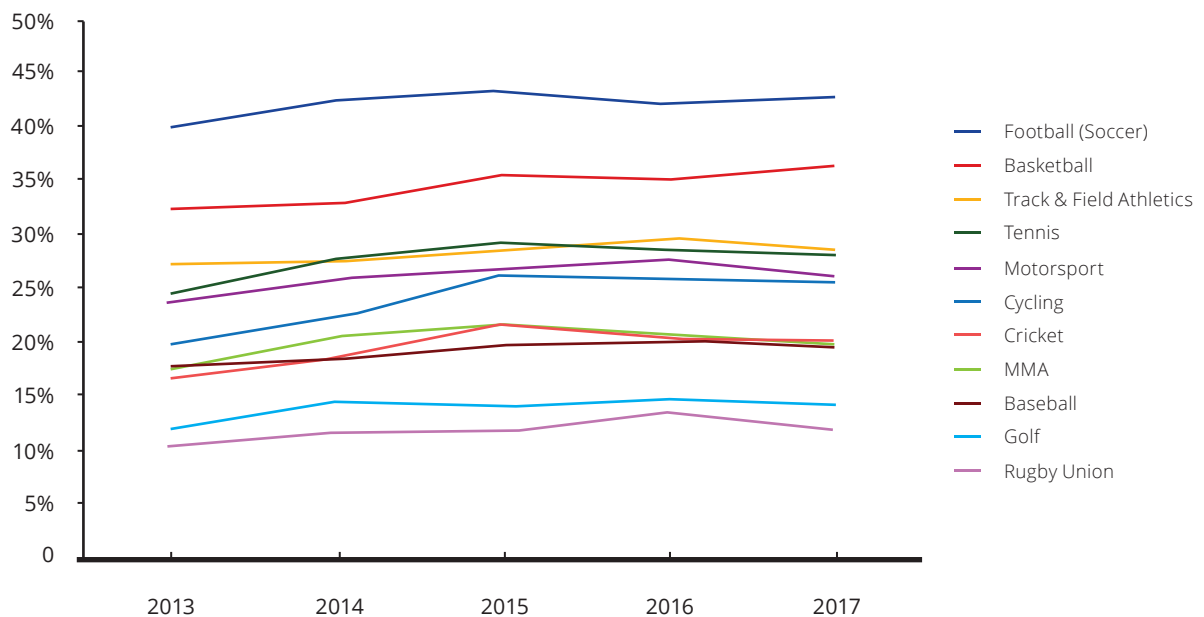
The data below from a survey of 18 markets across the Americas, Europe, the Middle East and Asia shows football consistently topping the chart, with 40% or more of respondents either "interested" or "very interested" in the sport. In 2017, football's 43% vote equated to 736 million people across the surveyed markets. Basketball is the clear second in the survey, capturing the interest of 36% of those interviewed, or 626 million, in 2017. At the bottom of the group, rugby union drew the interest of 12% (207 million) in 2017.



43%

PERCENTAGE OF PEOPLE INTERESTED IN FOOTBALL ACROSS THE MARKETS SURVEYED IN 2017

PERCENTAGE "INTERESTED" OR "VERY INTERESTED" IN MAJOR SPORTS



Source: Nielsen Sports DNA. Figures represent results from surveys of 18 markets: Australia, Brazil (urban population), Canada, China (urban), France, Germany, India (urban), Italy, Japan, Malaysia, Poland, Russia (urban), Singapore (urban), South Korea (urban), Spain, U.A.E. (urban), U.K., U.S.

Overall, interest in football, and the other sports, is fairly steady during the period. Within individual markets, football scored some wins in terms of increasing interest in important strategic territories. Interest in China increased from 27% in 2013 to 32% in 2017, in India from 30% to 45%, and in the U.S. from 28% to 32%.

There were also some notable downward movements, such as in Brazil. Perhaps representing a comedown from the high of World Cup 2014, interest dropped from 72% to 60% between 2013 and 2017.

The figures nevertheless underline football's status as the king of sports in terms of global interest, and indicate its power as a marketing and media platform.

FEMALE FANS



70%

**OF WOMEN THINK
THE FIFA WORLD CUP
IS "VERY APPEALING"***

Football's power to reach audiences around the world isn't confined to male audiences. Indeed, it is the most popular of the surveyed sports with female audiences, with nearly a third of women – 31% – interested across the 18 markets in 2017. Basketball is second with 28% of women, then track and field athletics (26%) and tennis (25%).

Football's tremendous popularity with men (54% across the 18 markets) leaves it with a male:female ratio among those interested of 64:36. This is in line with the other sports, except for the outliers of tennis and track and field athletics, which both had ratios of 55:45.

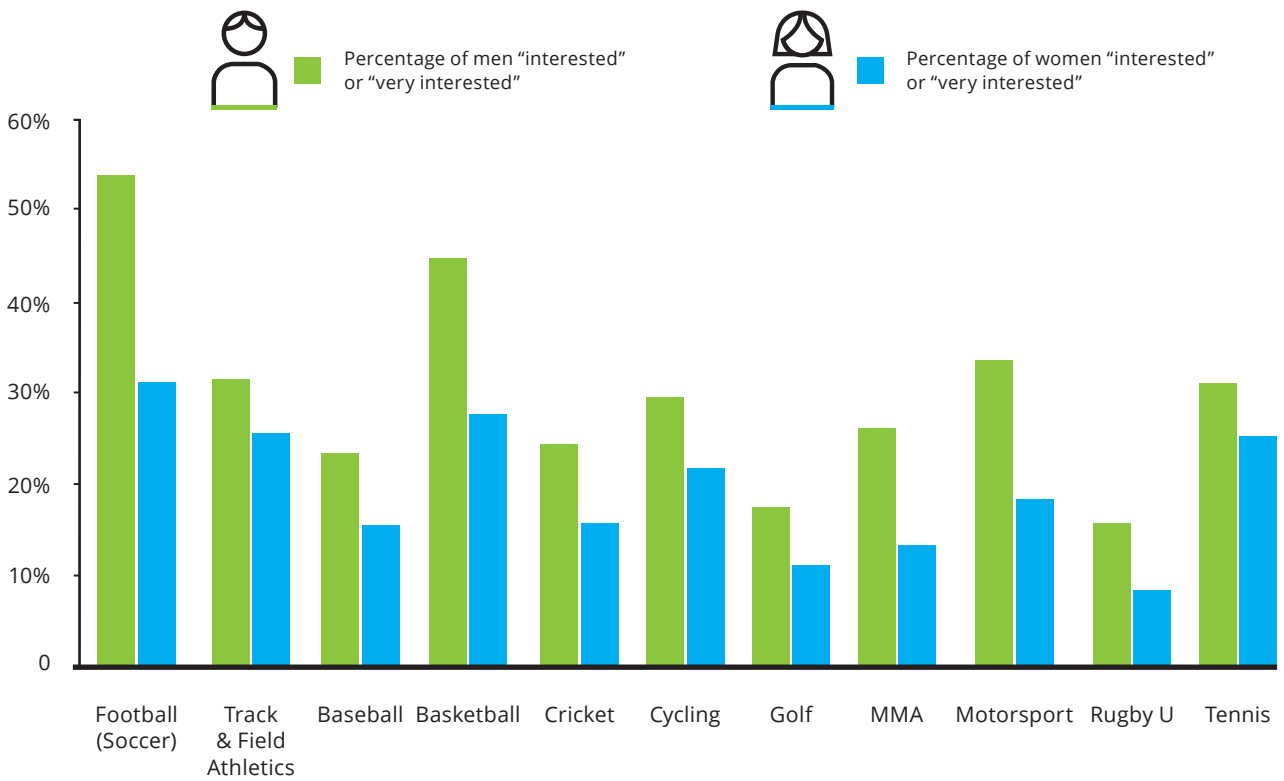
FIFA World Cups are landmark opportunities for football to extend its reach in new and growing audiences, such as female audiences, given the huge spike in media and public attention. So football stakeholders will be eagerly awaiting Russia 2018, and also next year's Women's World Cup in France.

The Women's World Cup is highly popular with female audiences – FIFA data from a separate survey, covering 24 markets and conducted in April 2018, shows that 58% of women find it "very appealing." But there is no doubt that Russia 2018 is the really big opportunity. Data from the same survey shows that 70% of women find the men's World Cup "very appealing."

*Survey of 24 markets across Europe, Americas, Asia, Africa and Australia.



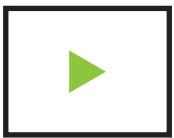
PERCENTAGES OF MEN AND WOMEN INTERESTED IN MAJOR SPORTS



Source: Nielsen Sports DNA. Figures represent results from May 2017 survey of 18 markets: Australia, Brazil (urban population), Canada, China (urban), France, Germany, India (urban), Italy, Japan, Malaysia, Poland, Russia (urban), Singapore (urban), South Korea (urban), Spain, U.A.E. (urban), U.K., U.S.

FOOTBALL'S BIGGEST MARKETS

Ranking the markets with the highest percentage of their population interested in football illustrates just how successful the sport has been in penetrating diverse cultures around the world. The table below ranks a list of 20 major markets by this measure. It contains four Asian countries, 11 European, three Latin American, one Middle Eastern and one African, all of which have more than 49% of their population interested in the sport.



131M

**NUMBER OF PEOPLE
"INTERESTED" OR
"VERY INTERESTED"
IN FOOTBALL IN THE
BIG 5 EUROPEAN
MARKETS COMBINED**

Football has made a big impact on the small population of the United Arab Emirates. The sport is strong right across the Middle East, and has been a major focus within the U.A.E. due to some significant investments by local governments and companies. The U.A.E.-based airlines Emirates and Etihad are major sponsors of European club football, and Sheikh Mansour, a prominent member of the royal family and government of Abu Dhabi, owns City Football Group, the portfolio of global football clubs that includes Manchester City.

U.A.E.'s 80% interest in football translates into only about 3.2 million people. At the other end of the scale in terms of population size, Thailand, second place in terms of penetration at 78%, has about 40 million interested in football, and Brazil has 75 million (60%).

Spain, Turkey and Portugal are the highest-ranked European nations on the list. Interest in Spain and Portugal has likely been boosted by the recent strength of their national teams and the popularity of star players such as Cristiano Ronaldo. The U.K. and France, despite being two of football's European heartlands, manage only 17th and 18th, respectively.

Although neither China nor India features in the chart, their enormous populations mean they have large numbers of football fans. Even taking a conservative count of urban populations only, China has 187 million "interested" or "very interested" in the sport and India 125 million. This gives China more football fans than the 131 million in Germany, the U.K., France, Italy and Spain combined, with India not far behind.

Including Russia 2018, 11 of the countries on the list have hosted a World Cup. A further six have hosted, have part-hosted or will soon host a major continental tournament (Copa America, Asian Cup or Euro). Only the Czech Republic, Hungary and Turkey haven't hosted either, although Turkey plans to bid for Euro 2024 and Hungary will host some matches at Euro 2020.

SELECTED MARKETS RANKED BY PERCENTAGE OF POPULATION INTERESTED IN FOOTBALL

Market		Percentage of population "interested" or "very interested" in football
1	United Arab Emirates	80%
2	Thailand	78%
3	Chile	75%
4	Portugal	75%
5	Turkey	75%
6	Mexico	73%
7	Spain	70%
8	South Africa	70%
9	Italy	67%
10	Poland	67%
11	South Korea	67%
12	Malaysia	65%
13	Brazil	60%
14	Germany	60%
15	Hungary	54%
16	Russia	52%
17	U.K.	51%
18	France	50%
19	Czech Republic	50%
20	Singapore	49%



187M

NUMBER OF PEOPLE
"INTERESTED" OR
"VERY INTERESTED"
IN FOOTBALL IN
URBAN CHINA

Source: Nielsen Sports DNA May 2017. Figures represent results from surveys of 30 markets: Australia, Austria, Brazil (urban population), Canada, Chile (urban), China (urban), Czech Republic, France, Germany, Hungary, India (urban), Italy, Japan, Malaysia, Mexico, Philippines (urban), Poland, Portugal, Russia (urban), Singapore (urban), South Africa (urban), South Korea (urban), Spain, Sweden, Thailand, Turkey (urban), U.A.E. (urban), U.K., U.S.

SPECIAL FOCUS: FANS IN FOOTBALL'S GROWTH MARKETS

The U.S., Mexico, Russia, China and India represent some of the most interesting growth markets for football.

In the U.S., headwinds have been blowing in football's favor for many years. The growth of youth participation, the increase in the Hispanic population, the growth of Major League Soccer, the popularity of the FIFA video game and successive World Cup qualifications for the national team (until this year) have been among the factors powering the sport.

Mexico's economy and middle class have grown strongly since the late 1990s, with its football industry benefiting off the back. The domestic Liga MX is the strongest in North America and is the best attended football league outside of Europe.

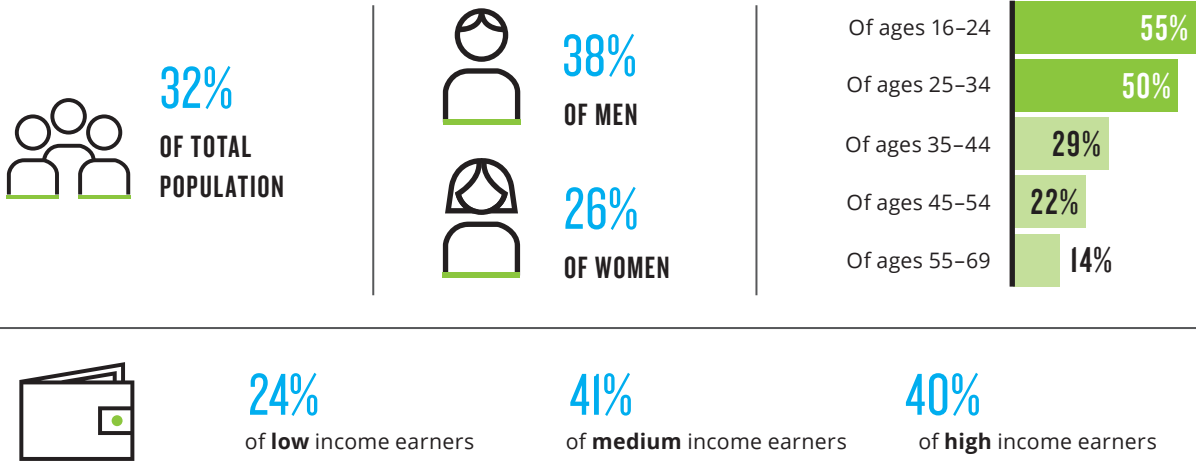
In Russia, football has always been a major sport and will receive a boost from this summer's World Cup, which will bring a huge focus to the game and the surrounding business, including in the development of stadia and training facilities. Domestic professional football needs the shot in the arm, having struggled for decades amid a weak economy and in competition with increasingly wealthy leagues from Western Europe.

In India, cricket dominates but football has been gaining ground. Football has always been big in certain regions, especially the Northeast. A big engine of growth in recent years has been the Indian Super League, a nationwide professional league launched in 2013 by a joint venture comprising Reliance Industries, one of the country's biggest industrial groups; WME-IMG, the global sports and entertainment group; and Star Sports, the 21st Century Fox-owned broadcaster.

In China, football has boomed off the back of the country's broader economic and sports industry booms. The sport has benefited from President Xi Jinping's personal interest in it, and desire to host a World Cup. Investment by Chinese businesses in the domestic league has turned it from an obscurity into a competition that has lured genuine global star players.

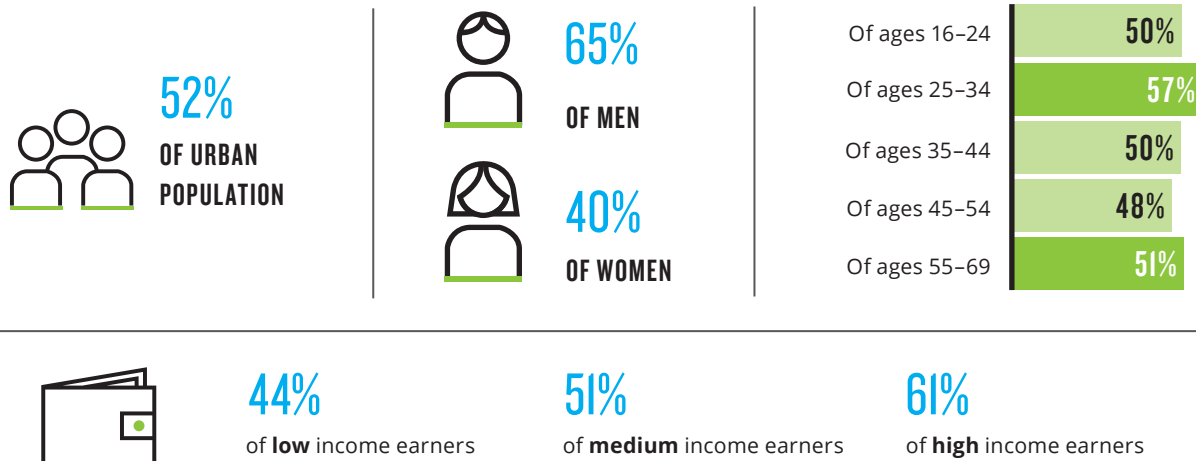
% "INTERESTED" OR "VERY INTERESTED" IN FOOTBALL AMONG VARIOUS DEMOGRAPHIC SEGMENTS

U.S.



RUSSIA

(urban population)



Source: Nielsen Sports DNA May 2017

MEXICO

(urban population)

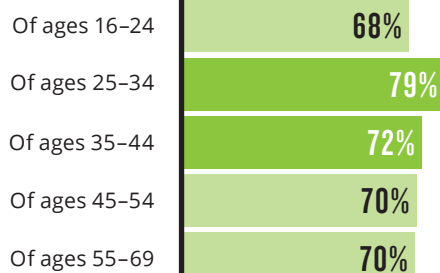
73%
OF URBAN
POPULATION



81%
OF MEN



66%
OF WOMEN



68%
of **low** income earners

73%
of **medium** income earners

84%
of **high** income earners

CHINA

(urban population)

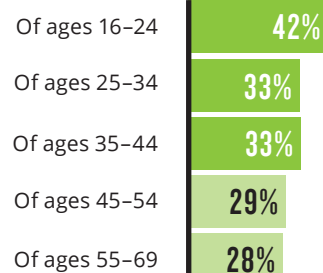
32%
OF URBAN
POPULATION



45%
OF MEN



20%
OF WOMEN



30%
of **low** income earners

31%
of **medium** income earners

36%
of **high** income earners

INDIA

(urban population)

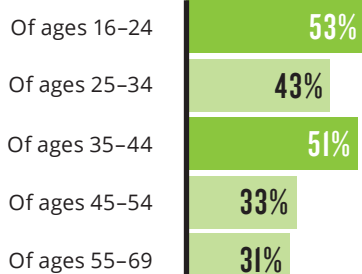
45%
OF URBAN
POPULATION



57%
OF MEN



31%
OF WOMEN



52%
of **low** income earners

41%
of **medium** income earners

47%
of **high** income earners

The percentages of the population in these countries either “interested” or “very interested” in football ranges from 32% in the U.S. to 73% among Mexico’s urban population. India has perhaps the biggest claim to be a “sleeping giant” – although it is not generally considered a football market, 45% of the country’s urban population reports an interest in the sport. It is worth underlining that the surveys of China, India, Mexico and Russia were of urban populations only. This means that, certainly in China and India where football is a relatively young and aspirational sport, the interest figures are probably higher than what could be expected from nationwide surveys.

In the U.S., China and India, football has greatest reach among 16- to 24-year-olds, the youngest age group surveyed, and the sport is generally less popular with older age groups. This is most pronounced in the U.S., where the 55% of 16–24s interested in football contrasts with only 14% of 55–69s. The gradient is not as steep in China, which ranges from 42% for 16–24 down to 28% for 55–69, or India, which ranges from 53% to 31% for the same segments.

In the more established football markets of Russia and Mexico, the differences across the age groups are less marked. In Russia, football is strongest among 25–34s, at 57%, and weakest among 45–54s, at 48%. In Mexico, it is also strongest among 25–34s, at 79%, but weakest among 16–24s, at 68%.

Interest in football among women is strongest in Mexico, where 66% report interest in the sport. In Russia, just over 40% are interested, and among the urban population surveyed in India the figure is over 30%. The U.S. is next, with just over a quarter of women interested. And among the Chinese urban population surveyed, nearly one in five are interested. In other words, in every country significant proportions of the female population are interested in football.

There are significant differences between the markets in terms of whether football has greatest penetration among those in low, medium or high income bands. In China, Mexico and Russia, the sport has greatest reach in the high income bands, at 36%, 84% and 61%, respectively. In the U.S., the sport does best in the medium (41%) and high (40%) bands, and is noticeably weaker in the low band (24%). In India, reach is greatest in the low band, at 52%, but the high band is not far behind on 47%, and the middle band is the lowest at 41%.

The data on these markets points to major growth opportunities for football. They have large populations and are either wealthy or becoming increasingly wealthy, and interest in football either is strong or has gained a foothold. Their football ecosystems are at varying levels of development, but there is clear headroom to grow aspects such as the domestic leagues, media rights revenues and sponsorship revenues.

2



Andres Iniesta, Leonardo Bonucci, Cristiano Ronaldo, Luka Modric, Gianluigi Buffon, Sergio Ramos, Toni Kroos and Lionel Messi at The Best FIFA Football Awards Show on October 23, 2017 in London, England.

THE PLAYERS

SOCIAL SUPERSTARS

Social media has given sports stars and other celebrities incredibly powerful platforms to build the value of their personal brands. Football players are among the global stars leading the charge across Facebook, Twitter, Snapchat and Instagram. Big followings on the platforms translate directly into increased value for partner brands, as well as teams, competitions, charities and other organizations that players associate with.

Instagram in particular has driven the influencer marketing trend and has become the most significant platform for personal brand-building. In the space of two FIFA World Cups, 2014 to 2018, its number of monthly active users has grown from about 250 million to over 800 million. The savviest sports Instagrammers publish a mixture of content to keep their followers engaged, around subjects such as training sessions, game build-up, family occasions, fashion and meetings with stars from other sports or walks of life. Their accounts give fans glimpses into their lives with a level of intimacy that was previously impossible and that the stars themselves can tightly control.

While the debate may rage about whether Cristiano Ronaldo or Lionel Messi is the better player, on social media the Portuguese star is football's clear G.O.A.T. Nielsen data from the first five months of 2018 underlines Ronaldo's dominance. His 570 million engagements across Facebook, Twitter and Instagram put him more than 370 million ahead of Messi, and 270 million ahead of second-placed Neymar.

Engagements are the key to understanding the value of a social media account or piece of content. They show how many people actually interacted with the account or content, giving a better idea of impact and influence than, for instance, a follower count.

Instagram accounts for the vast majority of engagements across the three platforms in the data presented on the following page, which covers a selection of the world's top players. The top 10 players in the selection by total engagements had a combined 1.5 billion on Instagram, versus 140 million on Facebook and 41 million on Twitter.

Follower counts of course remain significant, and here too Ronaldo rules. He has more than 322 million across Facebook, Instagram and Twitter, more than 120 million ahead of both Neymar and Messi in the chasing pack.



570M

**THE NUMBER OF
ENGAGEMENTS
CRISTIANO RONALDO
HAD ACROSS FACEBOOK,
INSTAGRAM AND TWITTER
IN JAN–MAY 2018**

The significance of engaging content, as opposed to big follower numbers, is underlined in the data. Zlatan Ibrahimovic had the seventh-biggest following among the analyzed players across the three measured platforms, with 64 million. But in the first five months of 2018, he was 14th in terms of engagements, with 43.2 million. In contrast, Manchester United player Jesse Lingard notched 22.6 million engagements despite having only 5.2 million followers.

This underlines that success on social media isn't necessarily directly related to success on the pitch. A broader range of factors comes into

SELECTED FOOTBALL STARS RANKED BY SOCIAL MEDIA ENGAGEMENTS, JAN–MAY 2018

	Player	Facebook engagements	Twitter engagements	Instagram engagements	Total engagements
1	Cristiano Ronaldo	47.7m	13.4m	509.2m	570.4m
2	Neymar	10.3m	4.9m	279.2m	294.3m
3	Leo Messi	29.2m	–	171.6m	200.8m
4	Sergio Ramos	11.8m	3.5m	143.2m	158.5m
5	Mo Salah	17.2m	10.3m	77.8m	105.3m
6	Paulo Dybala	2.7m	1.1m	86.0m	89.8m
7	Marcelo	3.7m	440.3k	80.0m	84.1m
8	Andres Iniesta	8.4m	4.1m	62.4m	74.9m
9	James Rodriguez	7.6m	2.2m	54.7m	64.5m
10	Paul Pogba	1.6m	1.4m	57.4m	60.3m
11	Phillipe Coutinho	513.6k	38.2k	59.5m	60.0m
12	Mesut Ozil	3.4m	3.1m	45.9m	52.4m
13	Luis Suarez	3.7m	1.5m	40.4m	45.6m
14	Zlatan Ibrahimovic	3.9m	1.3m	38.1m	43.2m
15	Gabriel Jesus	1.6m	1.4m	39.2m	42.2m
16	Ivan Rakitic	4.4m	2.1m	30.4m	36.9m
17	Toni Kroos	2.1m	1.2m	29.9m	33.1m
18	Antoine Griezman	2.3m	659.3k	29.0m	31.9m
19	Ter Stegen	2.6m	1.4m	21.4m	25.4m
20	Jesse Lingard	1.1m	2.1m	19.4m	22.6m

Source: Crowdtangle. Figures have been rounded to nearest 100,000 or nearest 100.

play, such as the ability to project a likeable personality or enviable lifestyle, leveraging relationships with other social accounts with bigger followings or coming from a country with a large population but relatively few stars.

The upcoming World Cup in Russia will bring an explosion of football-related social media activity. As well as from players, content will flow from sponsors, ambush marketers, traditional media, digital-native media, federations, teams, leagues and more, in a huge competition for engagement. And with social media penetration having increased strongly around the world since the last World Cup, the prize – the audience – is bigger than ever.

SELECTED FOOTBALL STARS AND CELEBRITIES RANKED BY FOLLOWERS

	Player	Facebook Followers	Twitter Followers	Instagram Followers	Total followers
1	Cristiano Ronaldo	122.4m	73.4m	127.0m	322.8m
2	Neymar	60.6m	39.8m	93.8m	194.2m
3	Leo Messi	89.6m	-	92.3m	181.9m
4	James Rodriguez	32.7m	17.1m	36.8m	86.6m
5	Andres Iniesta	27.0m	23.3m	23.1m	73.4m
6	Mesut Ozil	31.4m	23.1m	16.4m	70.9m
7	Zlatan Ibrahimovic	26.6m	5.1m	32.7m	64.4m

	Celebrity	Facebook Followers	Twitter Followers	Instagram Followers	Total followers
1	Selena Gomez	61.6m	56.7m	138.0m	256.3m
2	Beyoncé	63.3m	15.2m	115.0m	193.5m
3	LeBron James	23.2m	41.7m	37.9m	102.8m
4	David Beckham	53.8m	-	46.1m	99.9m
5	Donald Trump	23.3m	52.3m	8.9m	84.5m
6	Virat Kohli	37.1m	25.3m	21.7m	84.1m
7	Roger Federer	15.0m	12.4m	4.9m	32.3m

Data taken from Facebook, Twitter and Instagram on June 1, 2018. Figures have been rounded to nearest 100,000. Facebook Followers figures represent "Likes" for the individual's account.



A woman takes pictures with her mobile at a Russian football league game between FC Mordovia Saransk and FC Zenit-Izhevsk Izhevsk.

THE MEDIA

MEGA AUDIENCES DRIVE MEGA REVENUE

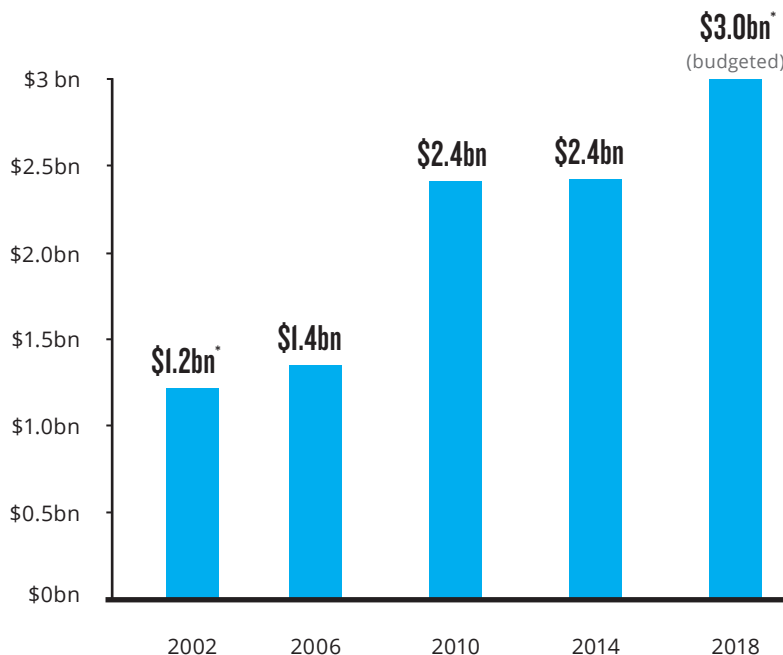
The FIFA World Cup is, along with the Olympics, one of sport's two true "mega-events," generating cumulative audience figures in the billions every four years.

World Cup media rights revenues have become FIFA's biggest income stream as broadcasters have paid increasing fees to tap into the huge audiences. These fees have risen despite the fact that the World Cup has remained largely on free-to-air television in the biggest football markets. This is somewhat unusual, as much of the sports media rights fee inflation that has occurred around the world in recent decades has been driven by pay-television.

The World Cup, like the Olympics, is not a big subscription-driver for pay-television services, as it is a four-week event every four years. Nine-month-long domestic football leagues, for example, are more effective in obtaining and retaining subscribers.

In football's biggest markets, the World Cup is considered of strong national significance and prioritized as a rights acquisition by public-service broadcasters. In some, such as the U.K., legislation dictates that the tournament must be shown on free-to-air television.

FIFA WORLD CUP MEDIA RIGHTS INCOME



*Media rights income for all FIFA events in the cycle. The World Cup accounts for the vast majority of the value in each case.

Source: FIFA

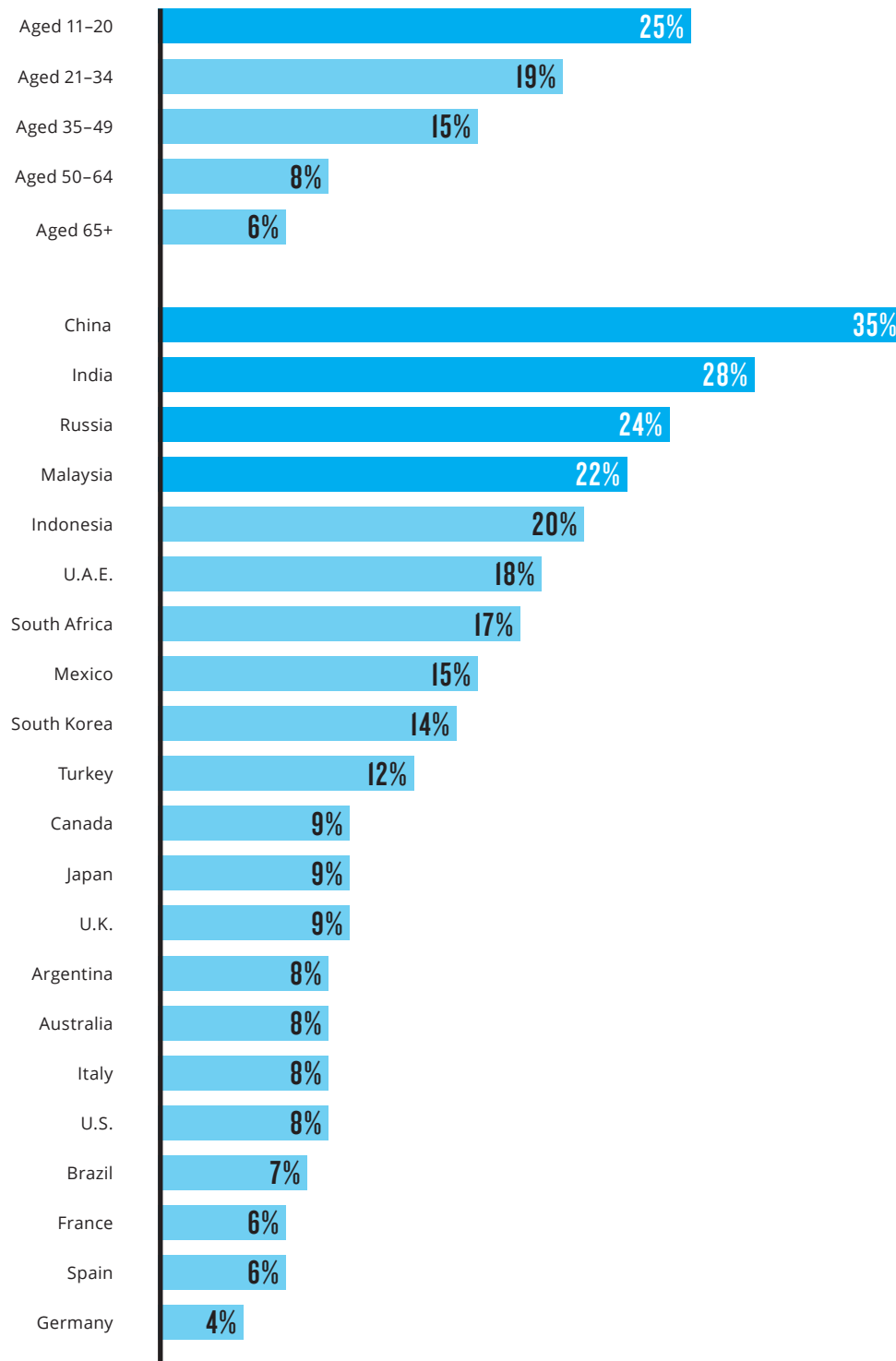
WORLD CUP VIEWING HABITS EVOLVE

Looking ahead to the World Cups in 2018 and beyond, it will be interesting to see whether audiences for the tournament hold up in a media and consumer landscape that is changing fast and generally resulting in lower audiences for traditional, linear TV. Viewers in 2018, particularly younger viewers, have more entertainments competing for their time than ever before.

In order to capture younger viewers, data suggests that World Cup broadcasters would be well advised to develop good mobile viewing options. As the table on the right shows, younger generations are much more likely to watch the upcoming tournament via mobile or tablet than older ones – 25% for 11- to 20-year-olds versus 19% for 21–34s and 15% for 35–49s.

Plans to watch via mobile are also much more evident in more recently developed markets like China (35%), India (28%) and Malaysia (22%). The lowest percentages for this intention are seen in the likes of the U.S. (8%), Germany (4%), France and Spain (both 6%). However, the advanced/recently-developed markets distinction doesn't hold throughout the dataset: Argentina and Brazil have among the lowest percentages of people planning to watch via mobile.

% WHO PLAN TO WATCH THE 2018 FIFA WORLD CUP VIA SMARTPHONE OR TABLET



Source: FIFA Brand Tracker, May 2018. Data covers both in-home and out-of-home viewing. Age group data is based on surveys of 24 countries: the 21 above plus Saudi Arabia, Nigeria and Qatar. All surveys were nationally representative except for Nigeria, Qatar, U.A.E. and Saudi Arabia, which were natural fallout.

THE BEAUTIFUL GAMERS

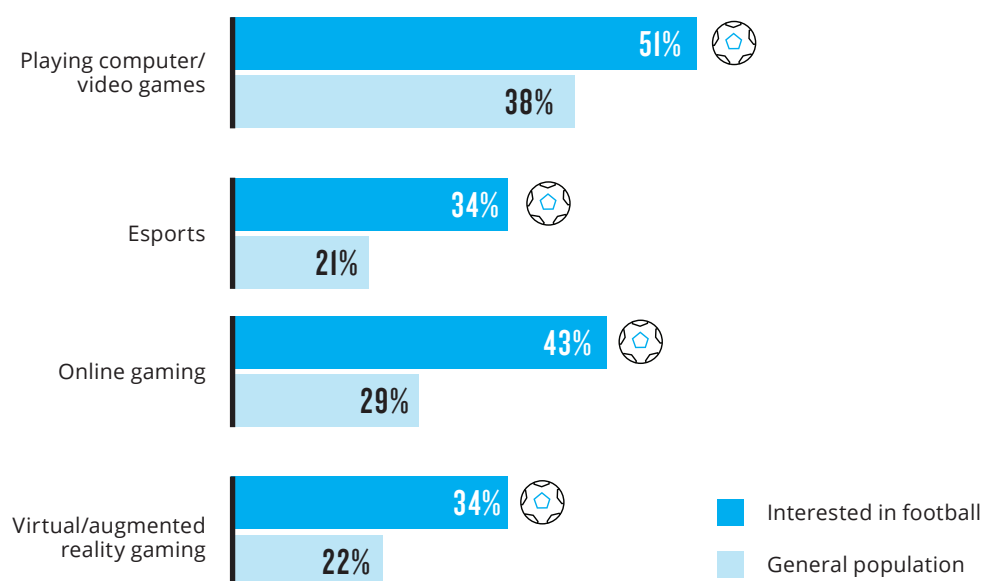
Video games, and particularly EA Sports' FIFA title, have become one of the primary media touchpoints between fans and football.

The FIFA game is a global phenomenon. Nielsen data from April 2018 indicates that awareness of the game among active gamers in each region is 66% in the U.S., and 83% in the U.K. The most recent edition, FIFA 18, sold 10 million copies in its first three months.

This year, FIFA and EA revamped the competitive structure around the game to better tap into the booming interest in esports, launching new competitions including the FIFA eWorld Cup, which will seek to crown the world's best player.

That there is a strong crossover between those interested in football and those interested in gaming is perhaps to be expected, given that the sport is followed by large numbers of young men. Nevertheless, the data below points to continuing strong opportunities in football-related video games, gaming brand football sponsorships, and even in introducing the next generation of VR and AR games to football fans.

% "INTERESTED" OR "VERY INTERESTED" IN...



Source: Nielsen Sports DNA 2017.

4



The 2018 FIFA World Cup mascot, Zabivaka the Wolf, during the presentation of the World Cup volunteer uniform at Football Park in Yekaterinburg.

THE SPONSORS

GLOBALLY, FOOTBALL FANS ARE POSITIVE ABOUT SPONSORSHIP

Despite the perennial narrative within football, strongest in its developed Western markets, that the sport is over-commercialized, football fans globally are generally positive about sponsorship. Nielsen data comparing the attitudes of those expressing an interest in the sport versus a broader group expressing at least some interest in “sport” as a whole across 18 markets shows the former being more positive about sponsors.

Nearly 57% of those interested in football agree that companies involved in sponsoring sports gain in appeal with the audience, against 50% among the broader group. When it comes to choosing products to buy, 51% of those interested in football would favor a sponsor’s product over a non-sponsor’s if price and quality were the same, compared to 41% among the broader group.

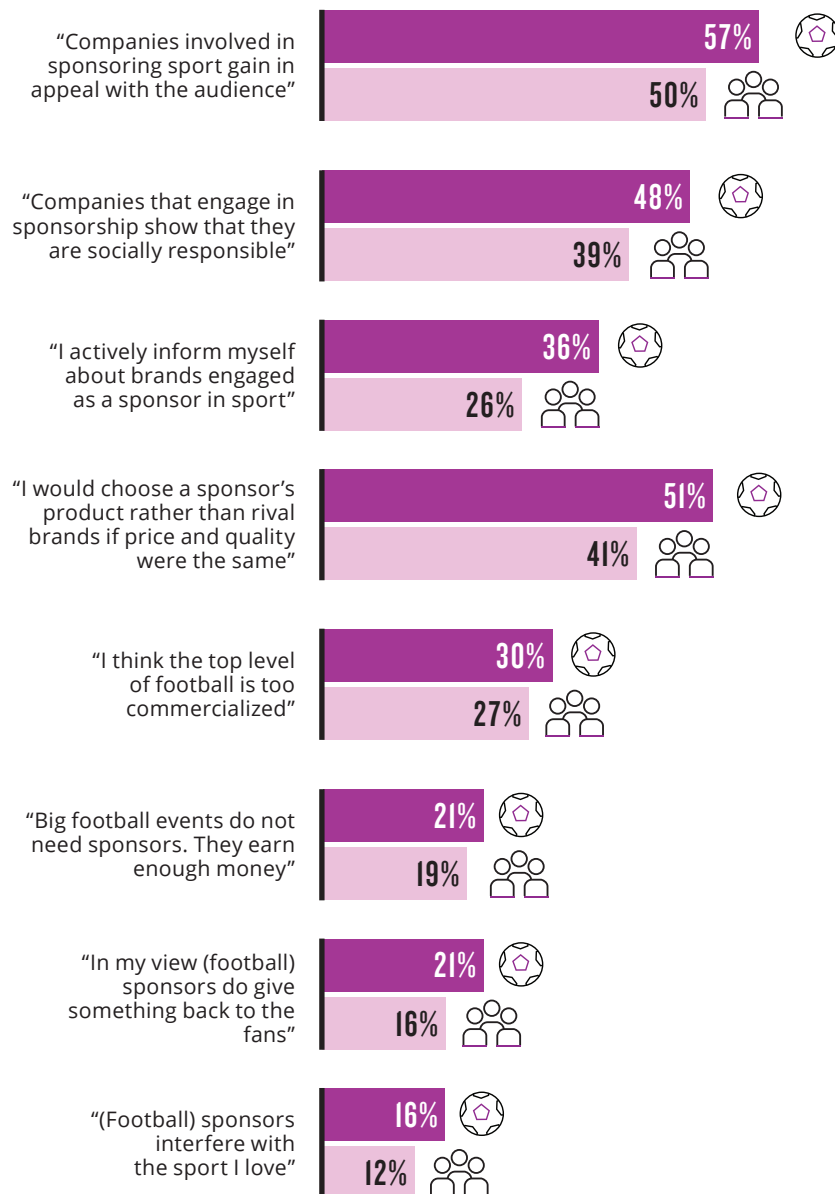
There are notable differences between markets. Respondents in the U.S., China, Brazil, India and Malaysia are generally much more positive about sponsorship than those in Western European markets.

Football fans are slightly more likely than the broader group to think football is over-commercialized. Across the 18 markets, on average 30% of those interested in football agreed with this statement. In the U.K. this figure jumps to 44%, in Spain 55% and in France 43%. By contrast, in Japan it was 20% and in China just 15%.

In general, the percentages of those interested in football who agreed with the negative statements around sponsorship are not large. Nevertheless, they are not insignificant, underscoring the need for sponsor brands to activate carefully, and strive to give something back to the fans and the sport when doing so.

% AGREEING WITH STATEMENTS ABOUT SPORTS SPONSORSHIP

■ Interested in football
 ■ At least some interest in sports



Source: Nielsen Sports DNA survey May 2017. Markets covered by survey: Australia, Brazil (urban population), Canada, China (urban), France, Germany, India (urban), Italy, Japan, Malaysia, Poland, Russia (urban), Singapore (urban), South Korea (urban), Spain, U.A.E. (urban), U.K., U.S. "Interested in football" represents those who said they were "interested" or "very interested" in the sport. "At least some interest in sport" was those who said they were "a little interested", "interested" or "very interested" of sport in general.

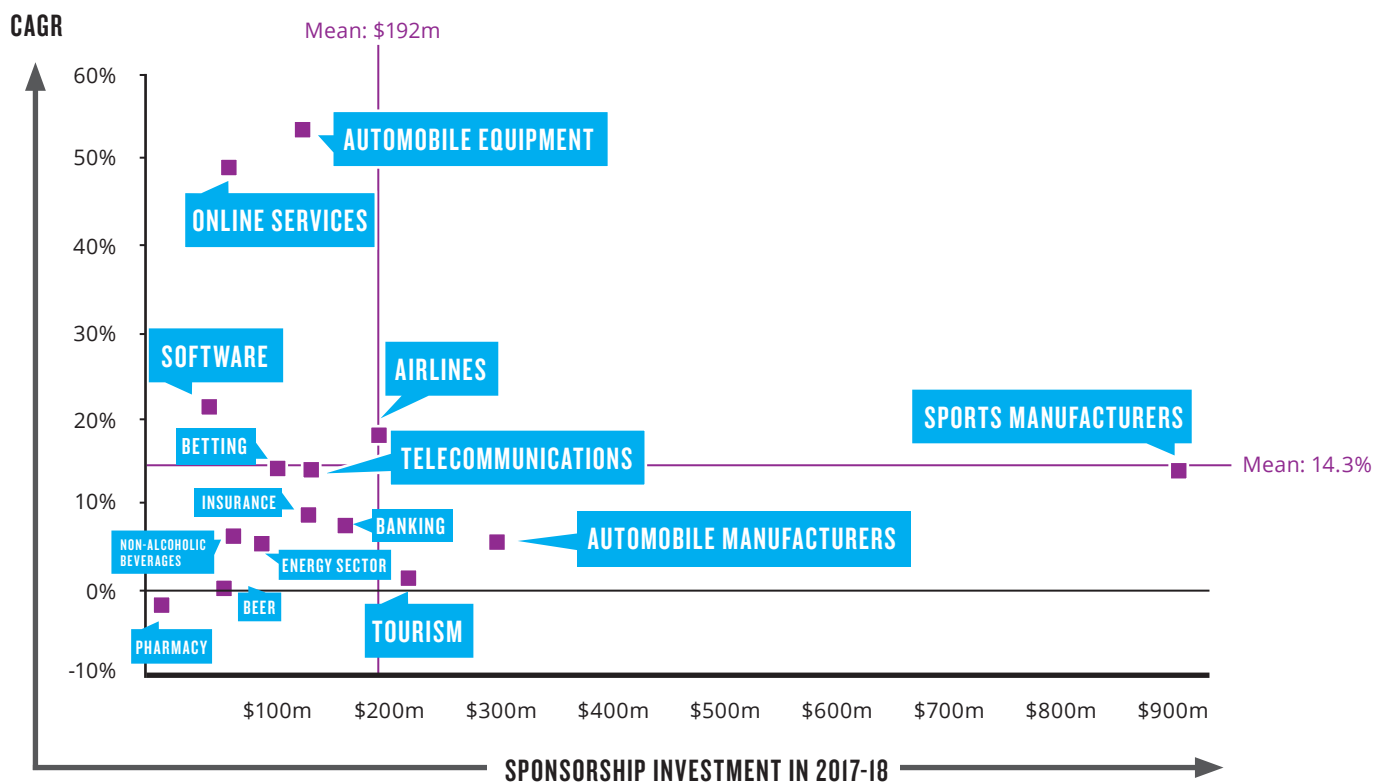
CARMAKERS AND ONLINE BUSINESS SPUR GROWTH

The competitions, clubs and players in Europe's top football leagues are the crown jewels of the sport when it comes to sponsorship. Their assets have enjoyed strong growth in value in recent years, and the chart below shows the industry sectors that have powered this growth.

Automobile Equipment and Online Services are the outstanding growth sectors, each with around 50% CAGR over the past six seasons.

TOP 15 SPONSOR INDUSTRY SECTORS IN THE TOP SIX EUROPEAN LEAGUES:

GROWTH IN INVESTMENT BETWEEN 2012-13 AND 2017-18 VERSUS 2017-18 TOTAL SPEND



Source: Sponsorglobe by Nielsen Sports. Values are based on approximately 6,000 analyzed sponsorship deals. CAGR value is based on the growth of the average annual sponsorship deal. The top six European leagues are: English Premier League, Italian Serie A, Spanish Liga, French Ligue 1, German Bundesliga, Dutch Eredivisie.

Asian tire manufacturers such as Yokohama Tyres (sponsor of Chelsea FC) and Nexen Tire (sponsor of Manchester City, Napoli and Eintracht Frankfurt) have been the main driver of growth in Automobile Equipment.

The massive growth in Online Services is down to one deal: Japanese retailer Rakuten's \$72 million-per-season partnership with Barcelona. Online Services is a broad category covering the wide and growing world of internet-based businesses, including retailers, ticket merchants, dating apps, website builders and everything else besides. Most of the deals in the category are of low value. Rakuten's deal is a huge outlier in terms of value and only began in 2017-18, driving up the CAGR figure for the category.

Looking along the value axis, Sports Manufacturers are the outliers because the category includes kit supply deals, which every club has. The other sectors above the mean are Airlines, Automobile Manufacturers and Tourism. The U.A.E.-based Etihad and Emirates are responsible for much of the airline value (see below). Car manufacturers have long been a major source of football sponsorship income. Many teams in the six leagues have deals with hotel operators, package holiday companies and other tourist industry organizations, but the value of this sector is massively inflated by Paris St. Germain's \$230 million-per-season deal with the Qatar Tourism Authority.

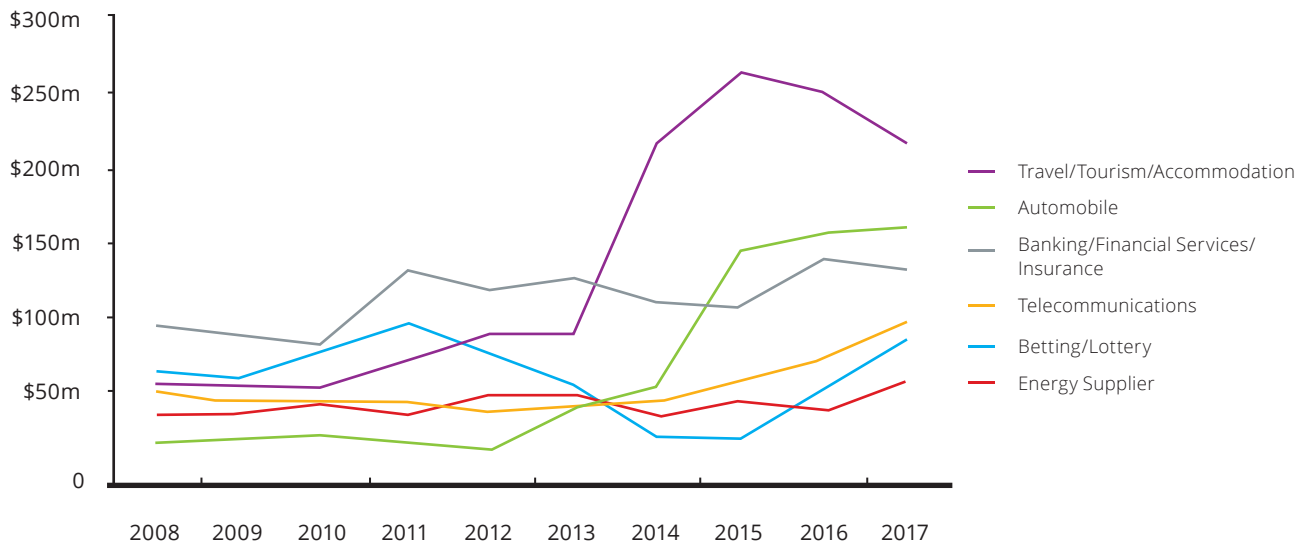
FINANCIAL AND GERMAN BRANDS POWER JERSEY SPONSORSHIP

Within the sponsorship inventory on offer in European club football, club jersey sponsorships are among the most visible and valuable.

In the last three years, brands from the Travel/Tourism/Accommodation and Automobile sectors have spent heavily on jersey sponsorship to join and then overtake Banking/Financial Services among the biggest-spending sectors. Travel/Tourism/Accommodation spending has been driven by Middle Eastern brands such as the airlines Emirates and Etihad.

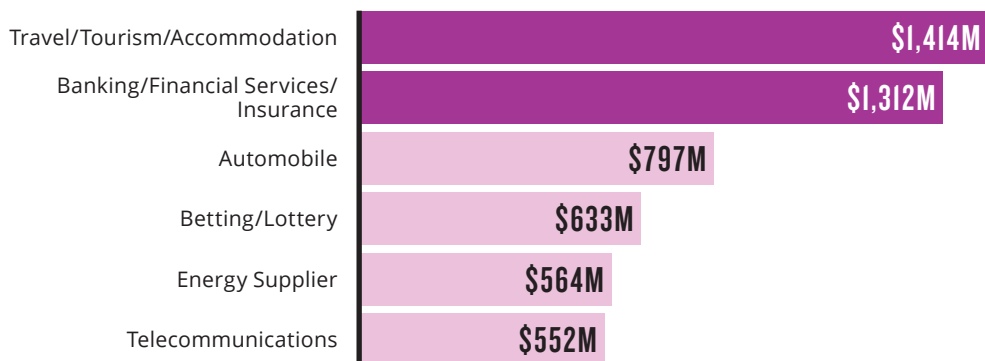
Banking/Financial Services spending has been consistently around \$130 million per year for the last 10 years. Between 2008 and 2013, that level of spending was enough to make it the biggest sector, before the Travel/Tourism/Accommodation and Automobile booms.

INDUSTRIES INVESTING MOST IN JERSEY SPONSORSHIP IN TOP SIX EUROPEAN LEAGUES, 2008-2017



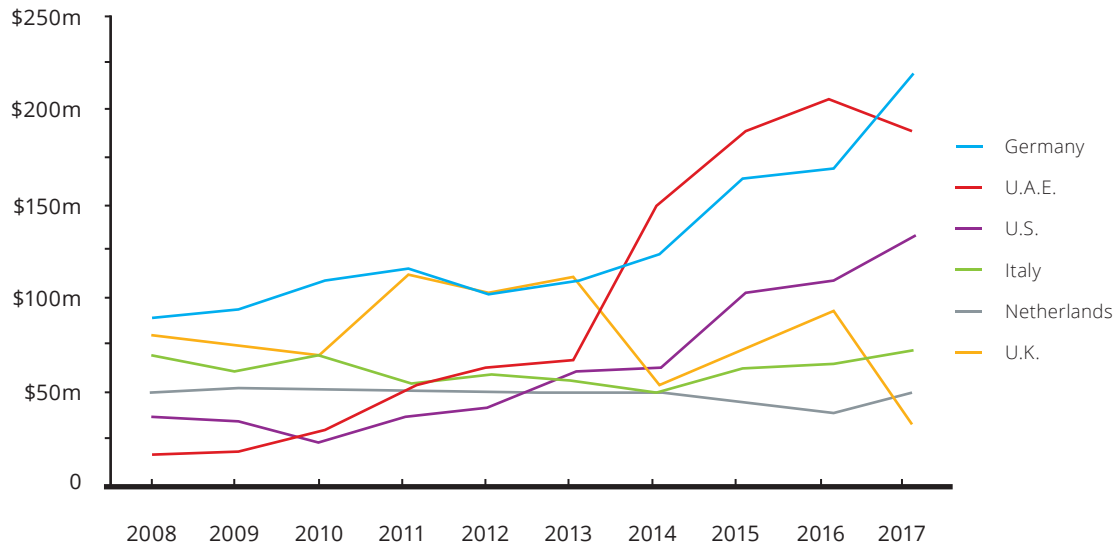
Source: Sponsorglobe by Nielsen Sports

TOTAL INVESTMENTS IN TOP SIX LEAGUE JERSEY SPONSORSHIP, 2008-2017



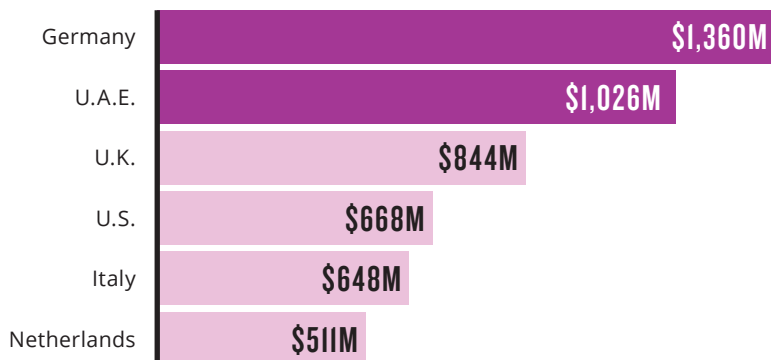
Source: Sponsorglobe by Nielsen Sports

MARKETS INVESTING MOST IN JERSEY SPONSORSHIP IN TOP SIX EUROPEAN LEAGUES, 2008–2017



Figures represent total investments by brands from each country.
Source: Sponsorglobe by Nielsen Sports

TOTAL INVESTMENTS IN TOP SIX LEAGUE JERSEY SPONSORSHIP, 2008–2017



Source: Sponsorglobe by Nielsen Sports

The companies that invest in jersey sponsorship mostly hail from the same countries as the leagues, but there are notable exceptions.

In 2017, Germany took back the mantle as the market investing the most in jersey sponsorship after a three-year run by the United Arab Emirates. The U.A.E.'s investment is driven by the government-owned airlines Etihad and Emirates, and their deals are some of the most prominent examples of the trend of Middle Eastern governments using sports to give their nations a bigger global profile. Abu Dhabi-based Etihad sponsors the Premier League's Manchester City. Dubai-based Emirates sponsors several clubs, including Real Madrid, AC Milan and Arsenal.

German industry has traditionally been a strong backer of domestic football. German brands have spent the most in total over the last 10 years, at \$1.36 billion. This puts them \$300 million ahead of the second-placed U.A.E. brands at \$1.026 billion.

U.S. companies have been investing increasing amounts over the last decade. Their \$139 million figure for 2017 is more than threefold the \$39 million invested in 2008. Investments by Dutch and Italian companies have been fairly steady over the period. U.K. investments have fluctuated quite a lot. The 2017 U.K. figure of \$34 million represents a low for the period, with the high being just under \$118 million in 2011.

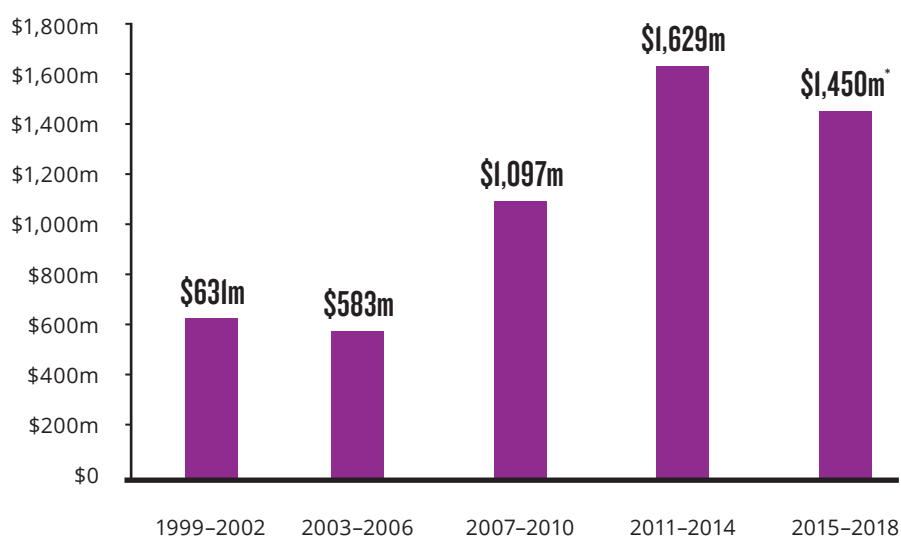
WORLD CUP SPONSORSHIP SURGES AND LEVELS OFF

The value of World Cup sponsorship has had ups and downs over the last two decades, but overall has grown strongly, with FIFA's 2015–2018 cycle revenues expected to be more than twice the 1999–2002 cycle revenues. In each four-year cycle, the World Cup accounts for the vast majority of the organization's sponsorship revenue – for example, in 2010 sponsorship income from other events generated \$25 million, and in 2014 it generated \$49 million.

The 2015–18 cycle was a tougher sell than the previous two, but a new crop of sponsors, including several from China, helped FIFA weather the storm. FIFA will be hoping to return to growth in the cycle leading up to the 2022 World Cup in Qatar. It can probably look forward to support from Middle Eastern brands seeking to capitalize on the region's first World Cup.

The organization will also be hoping for a positive response from sponsors to the 'FIFA 2.0' modernizing reforms introduced by president Gianni Infantino in 2016. These include investing in football development and increasing participation, introducing new standards for transparency and governance, and aiming to double the number of female players worldwide to 60 million by 2026.

FIFA SPONSORSHIP REVENUE



*Budgeted income, which FIFA expects to exceed.

Source: FIFA annual reports

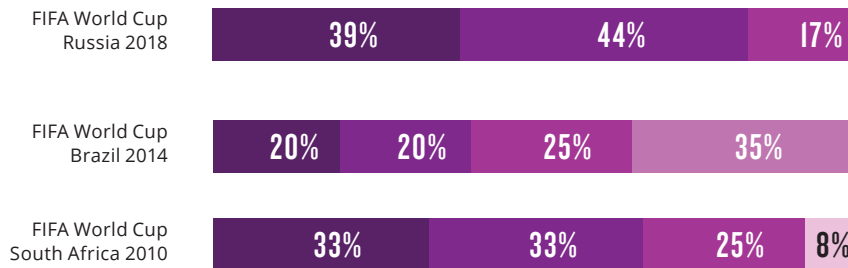
The vast majority of World Cup sponsors are from Europe, North America and Asia. African companies agreed deals during the 2010 South African World Cup cycle, and South American companies did so around Brazil 2014. But neither region contributes a sponsor today.

Asian sponsors are growing in prominence, and indeed are the most significant at World Cup 2018, accounting for 39% of deals. Chinese sponsors emerging for the first time during this cycle have been the major factor. Football has boomed in China, with strong encouragement from the government, which is keen to host the World Cup as soon as possible. FIFA's Chinese deals can be seen as the country's corporations rowing behind the national effort to develop the game and attract the World Cup.

ORIGIN OF WORLD CUP SPONSORS

■ Asia ■ Europe ■ North America ■ South America ■ Africa

SHARE OF NUMBER OF DEALS



Source: Sponsorglobe by Nielsen Sports

LOOKING AHEAD

This report contains some snapshots of where football is today. But where is the sport going in the future?

In April, Nielsen published its annual report on the most significant trends in the sports business. We see each of those trends playing out in and shaping football in important ways:

1 | DISTRIBUTOR DISRUPTION

As digital media encroaches on traditional television, we are seeing exciting new opportunities come hand-in-hand with potential pitfalls. Television has served football well, enriching federations, teams and players. But growth in media revenue is no longer certain, and indeed has already halted in some markets.

Football properties must experiment and adapt to the swiftly changing media landscape, to ensure that they reach the next generation of fans and retain their value to media.

2 | ESPORTS EVOLUTION

Gaming is emerging as an ever more powerful competitor for the time and attention of football fans. At the same time, football video games play a huge role in connecting millions of fans to the sport on a daily basis. Once again, opportunity comes hand-in-hand with threat.

Football properties are responding fast to make sure they can reach young fans via gaming, and we will see more and more linkages between the two sectors in the coming years.

3 | CONTENT RULES

Digital media has blown open the idea of what sports content is, who produces it, who controls it and who benefits from it. It has turned a business dominated by a small number of giant companies operating on strict schedules into a 24-7, furious, free-for-all battle for consumer attention.

Football content is facing more competition than ever before. At the same time, a huge variety of new creators are publishing football content that is more compelling and diverse than ever before. Opportunity and threat again.

Football must work with the new content creators and learn the new platforms' rules if it is to continue to thrive.

4 | SPONSORSHIP TO PARTNERSHIP

Sponsorships are becoming more complex, two-way relationships. Brands are becoming more demanding – they want partners that understand their business objectives and can mold sponsorships to help deliver these.

Football's massive audiences make attracting sponsors relatively easy for the top properties. But in a fast-changing world, they must not rest on their laurels. As in every other sport, football properties must listen and adapt to the increasing demands of brands if the revenue is to keep flowing.

5 | SPORTS IN OUR CHANGING SOCIETY

From sponsors becoming more wary of associating with sports with dubious ethics, to the necessity of developing women's sports, the role of sports in society is under the microscope like never before.

Football, with such huge reach around the world, reflects all of its communities' ills as well as their accomplishments. It has its fair share of problems, with corruption, poor governance, fan violence, racism and more. Fortunately, the more responsible actors in the sport are in the majority, and across the football world many projects are aimed at improving the society around it.

In 2018, good ethics and positive action on social issues are more important than ever in terms of securing business from sponsors, media and fans, so football must keep up its good work.

So far, football is adapting well to all this change. The world's biggest sport cannot afford to get complacent – competition from other sports and entertainments is hotter than ever. But if football's stakeholders play their cards right, there awaits a richer world of opportunity than ever before.



FOR FURTHER INFORMATION

on Nielsen Sports football industry analysis,
please contact:

Mike Wragg

Global Head of Research, Nielsen Sports

mike.wragg@nielsen.com

ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next and how to best act on this knowledge. For more than 90 years Nielsen has provided data and analytics based on scientific rigor and innovation, continually developing new ways to answer the most important questions facing the media, advertising, retail and fast-moving consumer goods industries. An S&P 500 company, Nielsen has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.

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