



nielsen

WORLD SPORTS REVIEW

2016



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2016

Global sport's top-line metrics, notably global sponsorship and media rights spend, continued to point in the right direction in 2016 but it was also a year of rapid change across the industry.

Two significant and game-shifting changes are well underway: China has finally emerged as a major global force, particularly in football where a string of team and agencies have been acquired. And OTT and Direct-to-Consumer services have really started to take hold.

“GLOBAL SPORT’S TOP-LINE
METRICS CONTINUED TO
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ACROSS THE INDUSTRY.”

Disney's investment in Major League Baseball Advanced Media (MLBAM), and the J-League's more recent deal with Perform Group's new streaming service, DAZN – dubbed a 'Netflix of sport' – provide the latest evidence that this is the future of sports content distribution.

Be it premium broadcast rights, new digital assets or the intellectual property itself, sports content has never been more prized. Two of the year's biggest sports transactions, the sales of Formula One to Liberty Media and the acquisition of Ultimate

Fighting Championship (UFC) by WME | IMG, offer a multi-billion dollar indication of how owning assets and IP is increasingly seen as important.

Nielsen Sports monitors all of these trends and more on an ongoing basis. The sheer volume of content being produced by sport and across the wider entertainment space, the changing consumption habits of fans and the emergence of new markets are the backdrop to this end-of-year review.

The following pages provide a global snapshot of a selection of the world's leading sports in 2016: analysis of the major commercial events, trends and talking points from UEFA Euro 2016 to the Ryder Cup, Rio 2016 to the Pakistan Super League.

As one year ends and another begins in this fast-moving industry, a fundamental understanding of the consumer – who they are, their preferences and purchasing habits, how they behave and what makes them tick – has never been more important in building effective commercial relationships.



GLENN LOVETT











Global Managing Director,
Nielsen Sports



DANNY TOWNSEND

Global Managing Director,
Nielsen Sports

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FOOTBALL

2016

In a year which saw major change in football's corridors of power, including new presidents at FIFA and UEFA, the main national team activity revolved around UEFA Euro 2016 and the Copa América Centenario. Portugal emerged as surprise winners of the former, defeating hosts France, while Chile beat Argentina to win the latter, a tournament involving teams from North and South America in celebration of the centenary of CONMEBOL, South American football's governing body. In Europe, Real Madrid beat city neighbours Atletico to win the UEFA Champions League. FC Barcelona, Juventus, Bayern Munich and Paris St-Germain all won their respective domestic leagues, but in England there was a gargantuan surprise as Leicester City, 5,000-1 outsiders at the start of the season, claimed a remarkable first league title. China is an increasingly influential player on the world stage, with investments in clubs and agencies across Europe in 2016 and, in its own Chinese Super League, several headline-grabbing transfer fees. Guangzhou Evergrande Taobao took that title while Korea's Jeonbuk Hyundai Motors FC won the Asian Champions League. Seattle Sounders won the Major League Soccer title, as America's top-tier soccer league pushed forward with expansion plans.



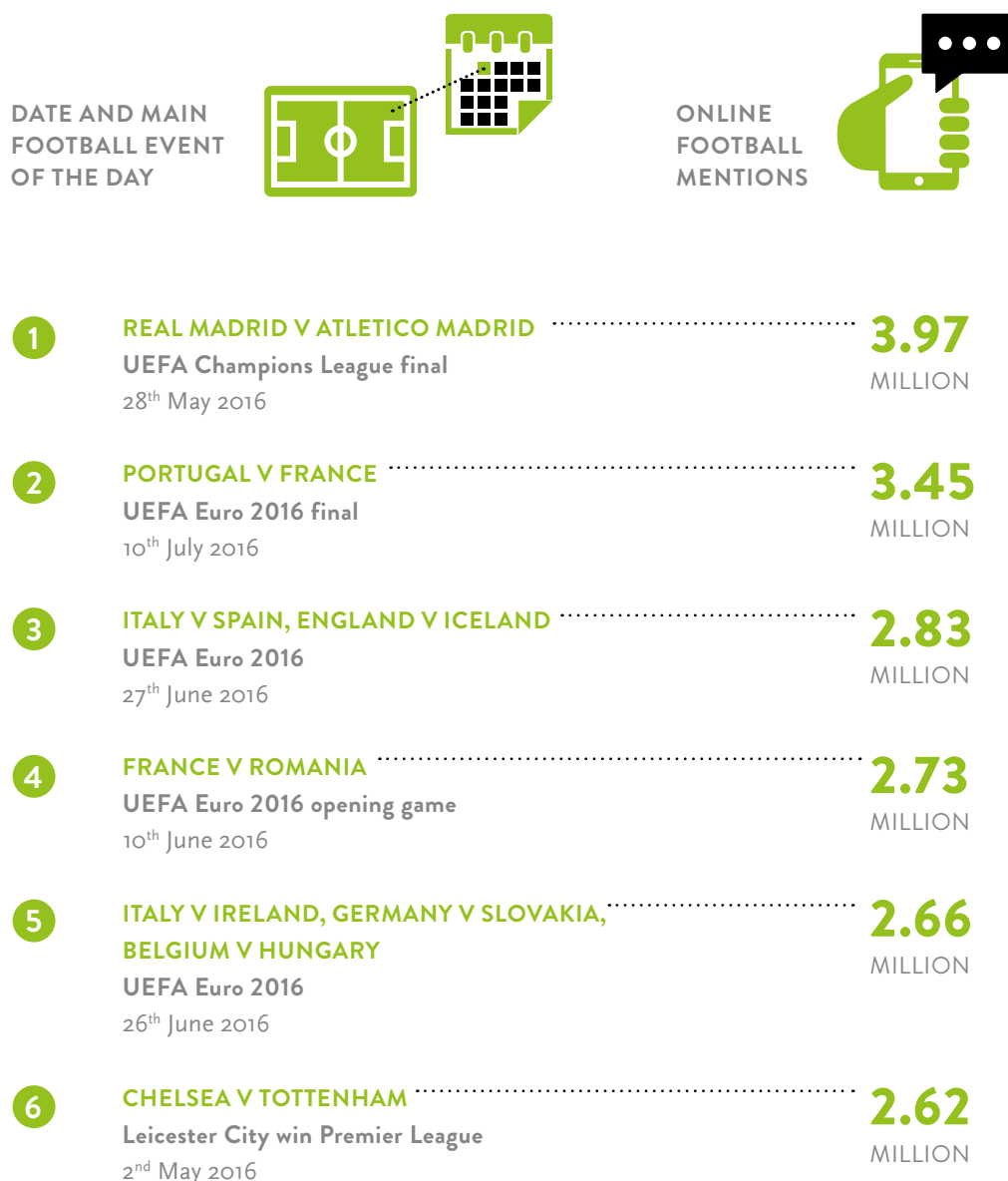
Portugal, led by talisman Cristiano Ronaldo, were the surprise winners of UEFA Euro 2016, beating hosts France in the final.

FOOTBALL'S BIGGEST DAYS ONLINE IN 2016

28th May, the day of the all-Madrid UEFA Champions League final, was football's biggest day online during 2016, according to **Nielsen Sports' Digital Pulse** tool. Digital Pulse analyses the social media accounts of over 750 teams and leagues across seven sports in eleven international markets to define with greater precision the global share of voice of sports, teams and events. Football generated nearly four million online mentions

on that day to head the list of the sport's most talked-about days in 2016. Key days during UEFA Euro 2016 were next, including the final, England's dramatic exit against Iceland and the opening game. Sixth on the list was 2nd May, when Leicester City were crowned Premier League champions without even playing as challengers Tottenham Hotspur drew 2–2 with Chelsea.

THE TOP 6



Source: Nielsen Sports Digital Pulse



RUGBY UNION

2016

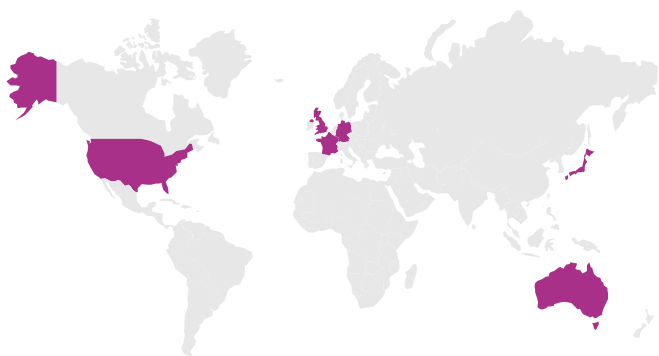
The afterglow of the most successful Rugby World Cup to date shone through into 2016, as World Rugby looked to capitalise on the growth of interest in rugby in new markets and the debut of rugby sevens at the Olympic Games in August accelerated that process. In the fifteen-man format New Zealand continued their global domination, winning the Rugby Championship to follow up their successful defence of the World Cup in 2015, although the All Blacks' 18-game unbeaten run came to a spectacular end in Chicago against Ireland. England, meanwhile, won the RBS Six Nations. In the club game, Saracens beat Racing 92 to claim their first European Champions Cup. The North Londoners secured the double, also winning the Aviva Premiership Final. Racing 92 took domestic honours in France, beating Toulon in the Top 14 season finale – a game played outside France for the first time, with Barcelona's Camp Nou acting as host thanks to a schedule clash with UEFA Euro 2016. There was an expanded 18-team Super Rugby tournament, with new franchises from Argentina and Japan making their debuts; New Zealand's Hurricanes took the title for the first time. Sevens made its Olympic debut in 2016, with Fiji following up their victory in the HSBC World Rugby Sevens Series by taking the country's first-ever gold medal. Australia beat New Zealand to take gold in the women's tournament.



USA's Perry Baker scores during the men's Olympic rugby sevens tournament at Rio 2016.

SEVENS, RIO AND RUGBY'S OLYMPIC RETURN

Rugby's return to the Olympic programme after 92 years proved a major success, increasing the number of rugby fans by 16.83 million, with the largest growth coming in France, the UK and the USA. Nielsen conducted surveys before and after the Games in six core markets – **FRANCE, JAPAN, THE UNITED KINGDOM, AUSTRALIA, GERMANY AND THE USA** – which showed that rugby's Olympic inclusion increased the reach of the sport.



INCREASE OF
16.83
MILLION RUGBY FANS
WORLDWIDE

*In six core markets – France, Japan, UK, Australia, Germany, USA

Rugby sevens' inclusion on the Olympic programme widened the reach of the sport in France, Japan, UK and the USA. **Interest grew in nearly all markets, with the largest growth coming in France, the UK and the USA.**

A **4% growth in interest** in rugby sevens marked the biggest increase post-Rio 2016 when compared with other Olympic sports.

Across the surveyed markets, there was a **10% increase** from those who said that they planned to follow rugby sevens at the Olympic Games to those that did follow the tournament. **Japan saw the highest increase, at 15%.**

Source: Nielsen Sports World Rugby study

39% of 18–24 year olds in the UK and 36% of the same age group in France watched rugby sevens at the Olympic Games. In **Japan**, there was a **16% increase among 18–24 year olds** who said rugby sevens was an exciting addition to the Games.

Interest in the Rugby World Cup post-Rio grew in all markets, with the largest growth coming in the **USA (6%)** and **Japan (5%)**, suggesting that the inclusion of rugby sevens in the Olympics has had a positive impact on the more established format of the sport.

The research also showed an increase in those who **see the sport as 'exciting' and 'entertaining'** and significant uplift in those who agreed with statements such as rugby sevens **'was a good fit with the Olympics'**. Asked about the appropriateness of rugby sevens' inclusion, the **biggest increase (16%) came in Australia.**

THE UK PERSPECTIVE

One year on from hosting a successful Rugby World Cup, rights holders, brands and agencies are looking to capitalise on the momentum the tournament generated in the UK at both an international and club level.

% of UK rugby fans who would choose a sponsor's product rather than a rival brand if price and quality were the same:

44%

CLUB RUGBY FANS

37%


INTERNATIONAL RUGBY FANS



GOLF

2016

— Golf's Olympic return after 112 years in August saw Briton Justin Rose take gold, following a titanic duel with Open champion Henrik Stenson. The women's gold medal went to South Korea's Inbee Park. All four men's Majors were won by first-timers: Britain's Danny Willett was the surprise winner of the Masters, after defending champion Jordan Spieth fell away dramatically in the final round. Dustin Johnson took the US Open before Stenson saw off Phil Mickleson at Royal Troon. American Jimmy Walker won the PGA Championship. Rory McIlroy took the PGA Tour's FedEx Cup, but the USA proved too strong for Europe to regain the Ryder Cup in a year when Italy was named as host of the 2022 edition. In the women's game Lydia Ko won the ANA Inspiration, Brooke Henderson took the KPMG Women's PGA Championship, Brittany Lang won a play-off to secure the US Women's Open title, Ariya Jutanugarn won the Women's British Open and Chun In-gee claimed her second career Major at September's Evian Championship.



Team USA's Jordan Spieth hits out of a bunker during October's Ryder Cup at Hazeltine, Minnesota.

REAL-TIME RYDER CUP

September's Ryder Cup, played at Hazeltine National Golf Club in Minnesota, saw the United States beat Europe for the first time since 2008, but it also saw Nielsen assisting the PGA of America, the organisers of the 2016 event, in determining the most effective position for sponsor signage around the course.

While producing a 'home field' atmosphere at Hazeltine – the PGA of America takes charge of US-based Ryder Cups with Ryder Cup Europe doing the same when Europe hosts – the PGA of America, with the aim of maximising the value generated by sponsors and maintaining a level of parity between the five primary sponsors, strategically placed signage based on known camera angles during live play.

Nielsen was commissioned to conduct live monitoring of branded assets during US television broadcasts – GOLF Channel and NBC provided over 25 hours of live television coverage in the US, while Sky Sports dedicated a whole channel to coverage in the UK. Utilising best practices and prior coverage information provided by Nielsen, the PGA of America developed an initial rotation schedule of placements for the five sponsors. Nielsen also tracked all sponsor signage on the first two days, monitoring the duration and share of voice each sponsor was receiving.

After each day's play, Nielsen provided insights regarding signage adjustments in order to increase visibility and parity for the sponsors. The PGA of America made adjustments ranging from alternating logos on signage to physically moving pieces of signage – for example the tee fence at the stadium-like first hole – to achieve better on-camera exposure.

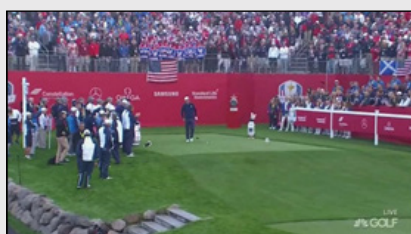
“HAVING NIELSEN ON-SITE AS THE EVENT UNFOLDED ALLOWED US TO MAKE REAL-TIME ADJUSTMENTS TO MAXIMIZE IMPACT FOR OUR SPONSORS.”

2016 Ryder Cup sponsors received both a significant increase in television screen time and greater levels of parity when compared to the event in 2014. “Given the intricacies of live television coverage, Nielsen was able to present data that exposed some situations that were not able to be previously anticipated,” said Jeff Price, Chief Commercial Officer of the PGA of America. “Having Nielsen on-site as the event unfolded allowed us to make real-time adjustments to maximize impact for our sponsors.”

RYDER CUP 2016 LIVE SPONSORSHIP MONITORING

HOLE 1 TEE FENCE

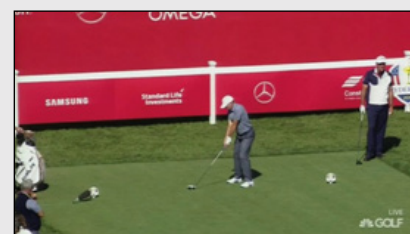
DAY 1 —————▶ DAY 2 —————▶ DAY 3



The tee fence is out to the side, limiting the view of brands from this camera angle.



The tee fence moved behind the tee box, offering a better visual for the brands from this camera angle.



The tee fence kept behind the tee box; however, the order of the sponsors has changed to create exposure parity.

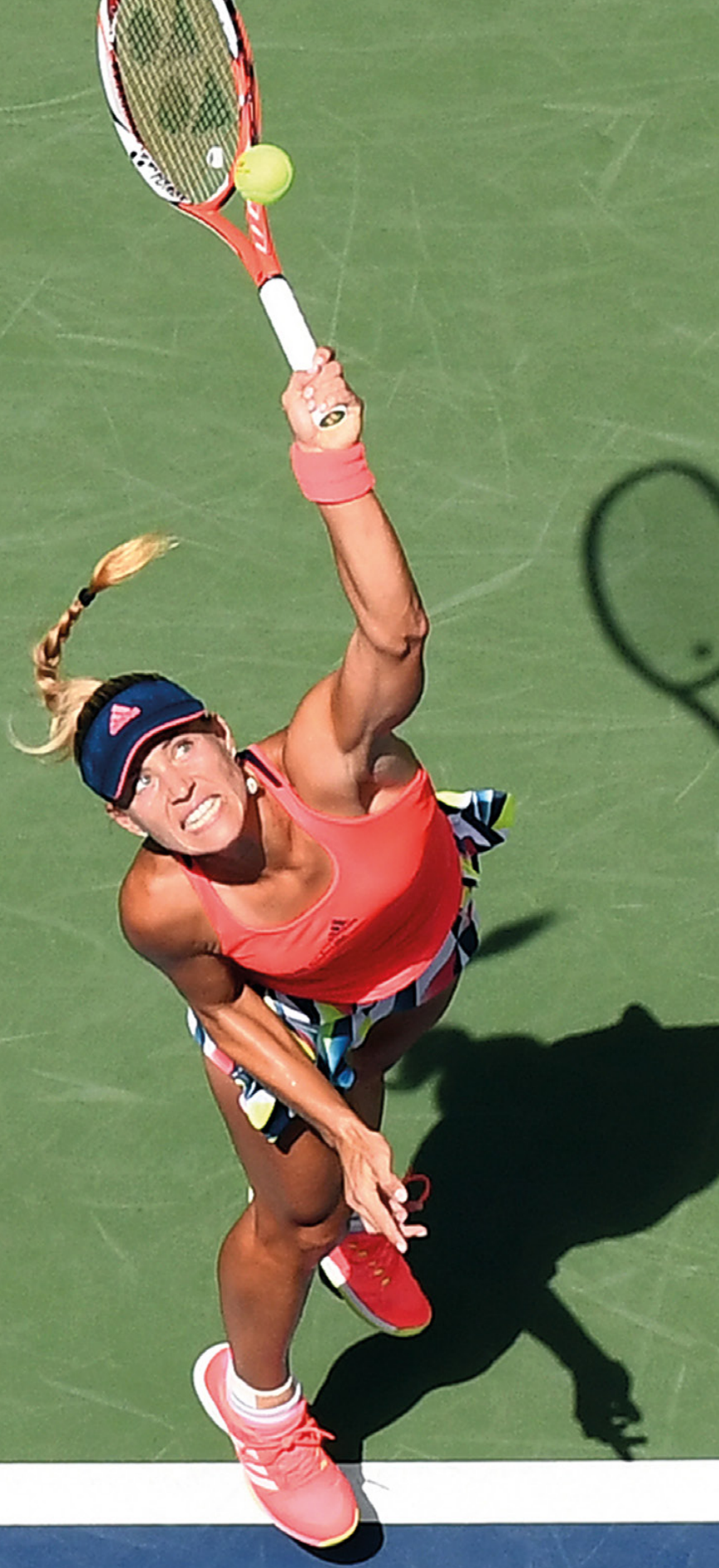
Source: Nielsen Sports



TENNIS

2016

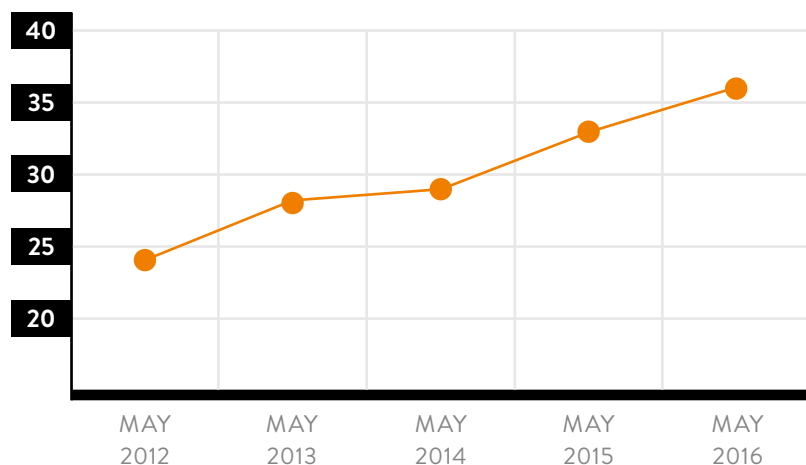
2016 started with victories for Novak Djokovic and Germany's Angelique Kerber at the Australian Open in Melbourne, the first Major of the year. On the clay in Paris, Djokovic was victorious again to complete his career Grand Slam. The women's tournament belonged to Spanish starlet Garbine Muguruza. Wimbledon, though, saw Djokovic's dream of a calendar Grand Slam end, defeated by American Sam Querrey in the third round. Andy Murray capitalised to win his second Wimbledon; Serena Williams, meanwhile, won the 22nd Grand Slam of her astounding career in London, beating Kerber. Kerber's second Grand Slam followed in New York, while Stanislav Wawrinka took the men's title. Murray, who successfully defended his Olympic title in 2016, ended the year chasing down Djokovic's number one ranking as Roger Federer and Rafael Nadal ended their seasons prematurely through injury. Maria Sharapova's ban for doping made for dramatic headlines during the season and the WTA Tour Finals in Singapore saw Slovakia's Dominika Cibulkova take the end-of-year title. Argentina won the Davis Cup, while the Czech Republic lifted the Fed Cup.



Germany's Angelique Kerber, pictured here at the US Open, won her first two Grand Slams in 2016, at the Australian Open and in New York.

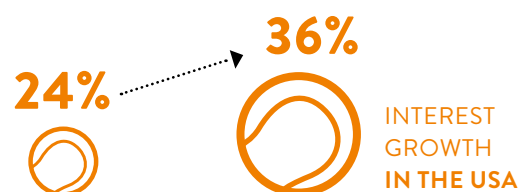
TENNIS IN THE USA: OFF THE BASELINE

TENNIS INTEREST IN USA 2012–16 (%)



Source: Nielsen Sports SDNA

Serena Williams' seventh Wimbledon title, achieved in July 2016, was the 22nd Grand Slam title of the American's glittering career. Despite a lack of Americans at the top of men's tennis – John Isner was the highest-ranked American in the world rankings in 2016, in 19th – the past five years, in which Williams has underlined her status as one of the greatest tennis players of all-time, has seen **interest in tennis in the United States rise from 24% to 36%.**



INSIGHT

ON TOP OF THE WORLD: ANDY MURRAY AND STANDARD LIFE

LAURA LAIDLAW, Senior Manager Brand and Sponsorship, Standard Life:

► In 2016 we used a content led approach to activate our sponsorship of Andy Murray. We created four films which told Andy's story of his journey to master his dreams through themes of resilience, sacrifice and expectation. Alongside these brand films, we also had a more light hearted series called 'When Andy Met' which featured Andy meeting two of his favourite sportsmen: Luol Deng, the Miami Heat Basketball player and fellow Team GB Olympian, and Robert Pires, one of Andy's favourite Arsenal football players. Tennis interest is sustained throughout the year, with peaks around Grand Slams so we have used

this information to influence when we post. All of the films were shared on social media and had a cumulative reach of 48,489,209.

We have found that awareness of our partnership with Andy from social media channels has increased, as has consideration of Standard Life as a result of the partnership. Tennis is the second most popular sport in the UK with a big ABC1 fan base. This fits well with our customer base, and the highest awareness of the partnership has been identified in this group which is very positive for us. Andy's success in 2016 has meant that the QI value from TV has increased this year, which has in turn increased visibility of our brand and our association with Andy. ◀



MOTORSPORT

2016

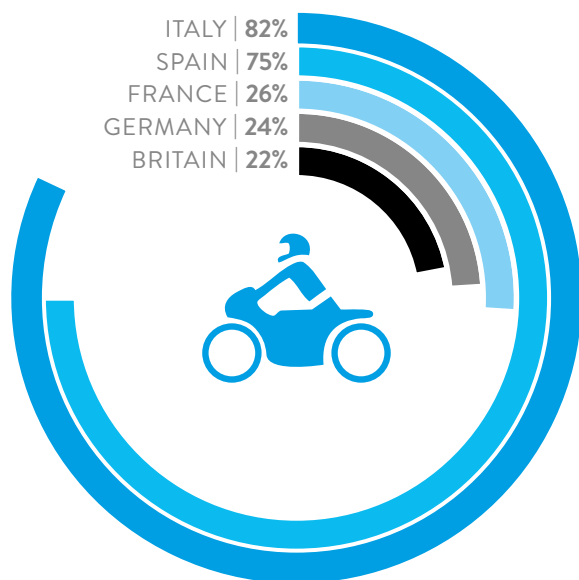
For a third successive year the Formula One world championship quickly distilled into an all-Mercedes battle for the title, with Nico Rosberg emerging victorious over Lewis Hamilton at the final race of the year in Abu Dhabi after a season full of ups and downs – a year in which the Haas team made an impressive debut and Baku staged its first Grand Prix. The Le Mans 24 Hours had the most dramatic of conclusions. Sebastien Buemi, meanwhile, became the FIA Formula E series' second champion, while Frenchman Sebastian Ogier won his fourth World Rally Championship ahead of his Volkswagen team's withdrawal from the series. In the United States, Simon Pagenaud won the IndyCar Championship, Alexander Rossi was the winner of a dramatic Indianapolis 500 and Jimmie Johnson took his seventh NASCAR Sprint Cup title. On two wheels, Honda's Marc Marquez won the MotoGP world title in a year when Jorge Lorenzo confirmed he will switch from Yamaha to Ducati for 2017. Briton Jonathan Rea successfully defended his Superbike World Championship.

Nico Rosberg beat Lewis Hamilton to the Formula One world championship in 2016 before making a shock announcement he was to retire with immediate effect.



ON TWO WHEELS: MOTORCYCLING ACROSS EUROPE

SPORTS FAN INTEREST IN MOTOGP



ON TWO WHEELS

Interest levels in MotoGP in Spain, home of world champion Marc Marquez and former champion Jorge Lorenzo, and Italy, home of the legendary Valentino Rossi, continued to dwarf other markets in 2016, among those fans with an interest in sport. Indeed in Italy, MotoGP is nearly as popular as Formula One. Of the big five European nations, meanwhile, **Italian sports fans are also the most interested in the World Superbike Championship (32%), ahead of the UK where 14% of sports fans said they followed the series in 2016.**

Source: Nielsen Sports Motorsport Survey 2016 (UK, France, Spain, Italy, Germany)



50% IS THE ADDITIONAL SPONSOR EXPOSURE VALUE A FRONT-RUNNING F1 TEAM CAN EXPECT TO ACHIEVE THROUGH BROADCASTER GENERATED COVERAGE.

INSIGHT

FORMULA ONE'S LOCAL HERO IMPACT

The impact a local driver can have on a market's Formula One popularity was underlined in 2016 by Dutchman Max Verstappen, who became the sport's youngest winner at May's Spanish Grand Prix, his first race for Red Bull Racing, and Indonesia's first Formula One driver Rio Haryanto, who competed in the first 12 Grands Prix of the year. The first half of the 2016 season saw audiences in Indonesia rise by **156% year-on-year**, fuelled by Haryanto's presence on the grid and the resulting expansion in local free-to-air television coverage.

In the Netherlands, home of 19-year old Verstappen, free-to-air broadcaster Ziggo Sport carries the bulk of Formula One coverage. The channel has seen year-on-year audience growth of over **13 million viewers**, a rise driven in part by the increase in magazine programming around the live qualifying and race coverage. Verstappen's starring role in the 2016 season, including his promotion from midfield Toro Rosso to frontrunning Red Bull Racing and his now-trademark daring overtaking moves.



CYCLING

2016

Chris Froome won his third Tour de France in July for Team Sky. Astana's Vincenzo Nibali took the honours at the Giro d'Italia, which began in the Dutch city of Apeldoorn, while Colombia's Nairo Quintana, riding for Movistar, won his first Grand Tour, ahead of Froome, at the Vuelta a España. The early-season European classics saw Australia's Matthew Hayman win Paris-Roubaix, while at the end of the year Peter Sagan successfully defended his men's world road race title in Doha. Denmark's Amalie Dideriksen won the women's road race in Qatar. Belgian Greg van Avermaet became Olympic champion, winning the men's road race in Rio de Janeiro; the women's event was marred by several crashes and eventually won by Dutch rider Anna van der Breggen. The Olympic time trial titles were taken by Fabian Cancellara of Switzerland and America's Kristin Armstrong. On the track, Great Britain dominated in Rio with six golds. In October, cycling's global governing body, the UCI, announced that Yorkshire will host the 2019 World Road Championships.

The 2016 Tour de France, the 103rd edition of the race, hits the Alps. Briton Chris Froome took his third victory in July.



INSIGHT

CYCLING'S COMMERCIAL TRENDS

JEROME BOUCHAT, Managing Director, Nielsen Sports Belgium:

► There are various challenges in the marketplace but cycling remains a great marketing platform. It offers a lot to the brand, not least the chance to name a team – it's one of the few sports where the name of the team is the name of the sponsor and everyone uses that name.

We are seeing a lot of investment from watch and timing brands: Tissot has come in to cycling and provide official timing for all the ASO races and Tag Heuer has signed up as a co-sponsor of the BMC team. We have also seen a team like Astana which has been part of a government tourism strategy and next year we will have the Bahrain Merida team which is investing a lot.

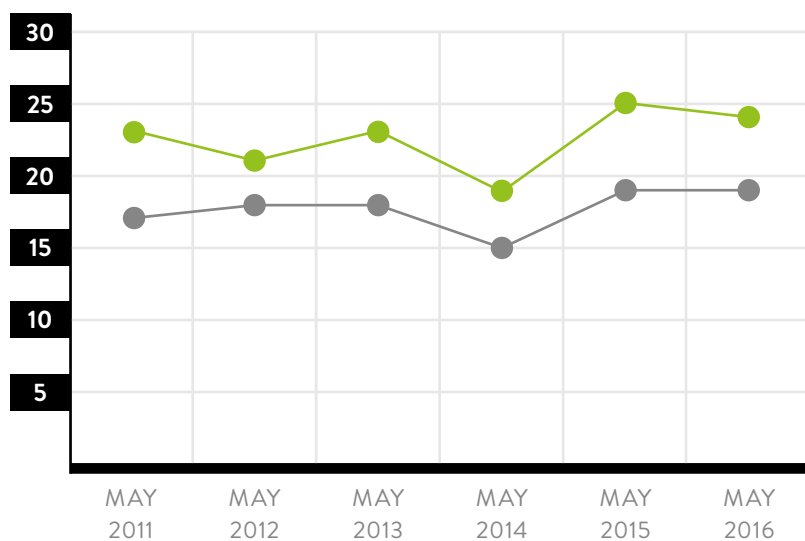
One of the major trends is that the sport is really beginning to understand the technologies available and how that can

change the cycling offer to fans and viewers. We've seen innovations with GoPro at the Tour de France, which shows all the key moments. There are new technology companies arriving in cycling, such as Dimension Data who now have their own team and also sponsor the key events. Their goal is not just to have exposure and awareness, but also to be able to use the sport to demonstrate their expertise.

The great thing for cycling sponsors is you can start the season in Australia, then go to the Middle East, then Belgium and France, Netherlands, Spain, Italy, then to the UK and the US, Canada. When you are in those markets, cycling can hit multiple cities and regions. It's an opportunity to reach and target a lot of people, but a team needs to create those opportunities. With digital, cycling teams can own and control their own media – and then monetise it, with the help of sponsors. ◀

GERMANY'S INTEREST IN CYCLING 2012–2016 (%)

● CYCLING ● TOUR DE FRANCE



GERMANY RISES AGAIN

BOUCHAT: ► Germany is the biggest market in Europe, so it is crucial. The Tour de France starts in Dusseldorf next year and the Tour of Germany, which disappeared several years ago, back again. There are also a lot of good German riders which has led to German brands re-appearing, for example Bora-Hansgrohe, a German team with German sponsors that have invested a lot of money. Outside of the commercial scene, the credibility and image is vital. Germany effectively boycotted cycling – no events, no TV coverage – due to concerns about doping. Now, Germany having events, riders, team and TV rights coming back is a barometer for the credibility of cycling; it's a very good and important sign. ◀

Source: Nielsen Sports SDNA (Top 2 box)



CRICKET

2016

— The year's showpiece international cricket event was the ICC World Twenty20 in March, staged in India and won, for the second time, by the West Indies who defeated England by four wickets in the final. The rise of T20 around the world was underlined by news from England in September when the England & Wales Cricket Board (ECB) announced that counties teams have given the go-ahead for an eight team tournament. Elsewhere in the world, the Sunrisers Hyderabad won the Indian Premier League for the first time; the 2015–16 Big Bash League was won by Sydney Thunder; Titans won South Africa's Ram Slam; and Jamaica Tallawahs took the honours in the fourth edition of the Caribbean Premier League. In Test cricket, India led the rankings after a successful tour of the West Indies in June and July. England and Pakistan drew their Test series 2–2, England beat Sri Lanka 2–0 and Australia lost 3–0 in Sri Lanka to lose their place at the head of the rankings.



Denesh Ramdin of the West Indies
in action during a one-dayer against
Australia in Bridgetown, in June.

INSIGHT

PAKISTAN SUPER LEAGUE

The rise of Twenty20 leagues around the world has been a trend in cricket for the best part of a decade. In February 2016, the Pakistan Cricket Board joined the party, successfully launching the Pakistan Super League, a five-team franchise-based tournament. Islamabad United won the first tournament, which was played in the United Arab Emirates. Nielsen Sports was engaged as the PCB's consultant on the tournament and as **NAILA BHATTI**, the PSL's Marketing Director explains, PSL organisers are using the experience of the inaugural edition to optimise the 2017 tournament.

Could you outline the success from a commercial point of view of the inaugural PSL?

NAILA BHATTI ► From a commercial point of view, the revenues we have received from the sale of the franchises were better than what we expected. We had a conservative view on franchise sales as it was the first ever professional sporting league in Pakistan, but we were very happy with the result. We received high demand from people wanting to buy franchises so if we hadn't restricted it to five, we would have been able to sell another one or two. We are still receiving enquiries frequently about our sixth expansion franchise. An international broadcasting deal was also a good commercial highlight for us. Unfortunately, the local Pakistan broadcasting deal was not what we had hoped for. Commercially breaking into the United Arab Emirates brand market was an unexpected but very good result for us in season one of the league. We play our national team matches in the UAE but we had been unsuccessful in the past in getting any UAE brands to sponsor those matches. For the PSL 1, we had two Middle East-based brands – Qatar Airways and Du. We finally broke into the market in terms of sponsorship so that was a great achievement for us.



**MEDIA VALUE
OF PSL 1 SPIKED BY
288%
DURING THE TOURNAMENT
PERIOD COMPARED TO ONE
MONTH PRE-TOURNAMENT.**



**PSL FACEBOOK FOLLOWERS
NUMBER GREW OVER
230%
DURING THE TOURNAMENT**

What's been the biggest commercial challenge along the way?

BHATTI ► Having our own national league in another country. It is always challenging to engage our core Pakistani fans when we have a tournament in the UAE. It's more challenging to get fan engagement and excitement when everything is happening outside Pakistan. This also impacts our sponsorship sales because local brands want strong activation and engagement locally. We are trying to have the PSL 2 final in Lahore this time so hopefully that will make it better for us.

How do you plan to make the tournament bigger and better from a commercial point of view?

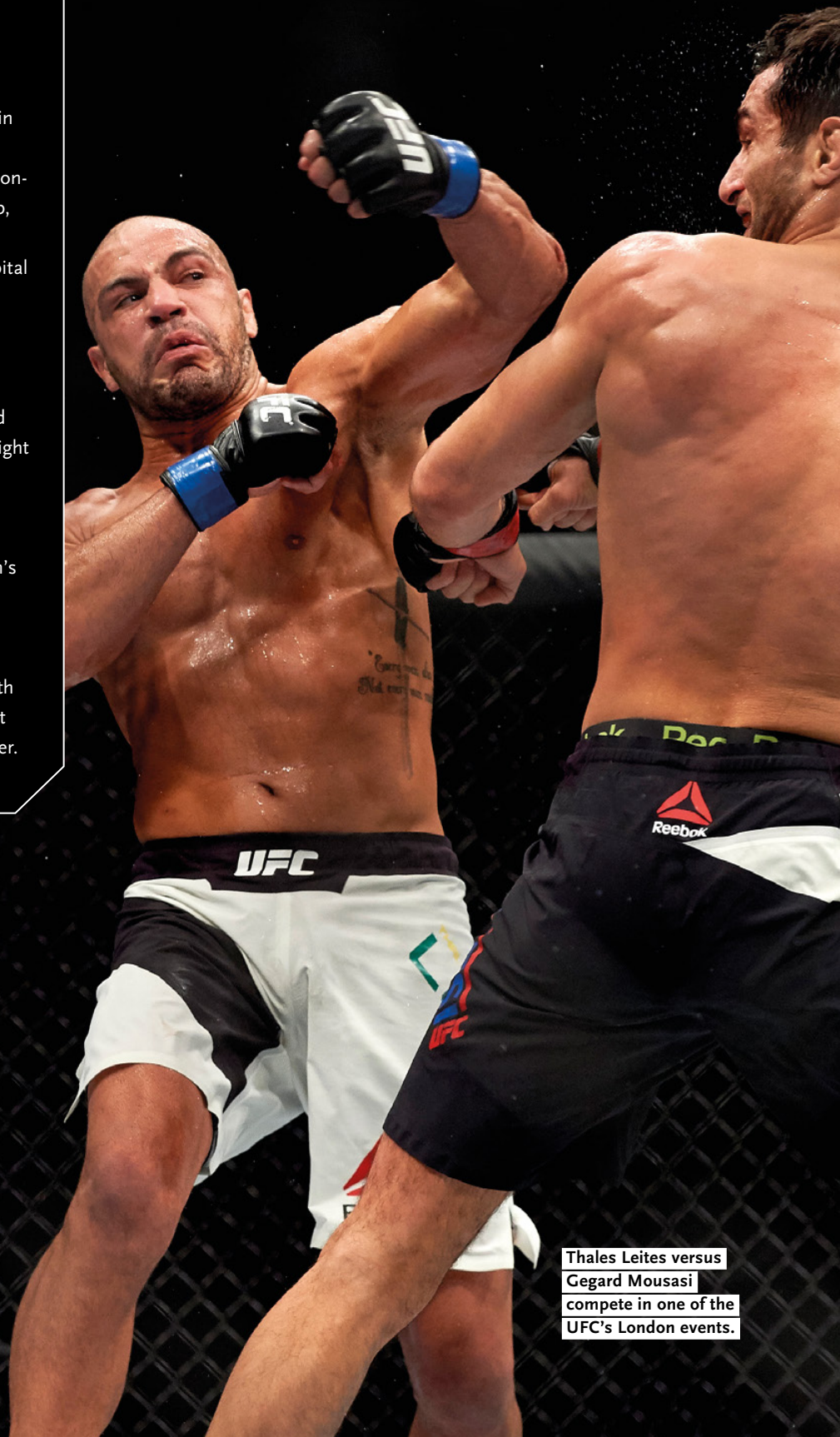
BHATTI ► We always think about how to make a tournament better and bigger! One of the reasons we work with Nielsen Sports is to help us make that happen. We are doing various different things this time: one is the launch of an official fan club, where we are working with one partner to provide an affordable travel package for our fans to go to Dubai for PSL 2. On top of that, we want to bring an international feel to our event by introducing more foreign players and celebrities for the opening and closing ceremony. It is somewhat challenging for us because there are other cricket events happening when we are playing the matches but hopefully we can get more foreign players as time goes by to continue to strengthen the PSL league and the value for our franchise partners. ◀



MIXED MARTIAL ARTS

2016

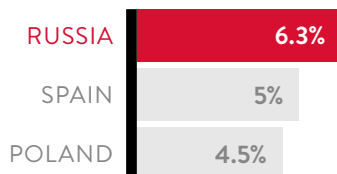
The growing mainstream appeal of mixed martial arts (MMA) was underlined in 2016 when WME-IMG acquired the sport's premier category, Ultimate Fighting Championship (UFC) in June and ONE Championship, Asia's leading promotion, received an eight-figure investment from Heliconia Capital Management shortly afterwards. Brash, outspoken and unashamedly controversial, Irishman Conor McGregor has established himself as the standout star of UFC. In November, he became the first man to hold two belts simultaneously by beating lightweight Eddie Alvarez at Madison Square Garden – the show was UFC's first in New York. Following Ronda Rousey's shock defeat in November 2015 by Holly Holm, the Women's Bantamweight Championship passed into new hands again when Holm lost to fellow American Miesha Tate. 126 days later Tate herself lost to Brazilian Amanda Nunes, with Rousey scheduled to fight her in an attempt to win the title back at UFC 207 in December.



Thales Leites versus
Gegard Mousasi
compete in one of the
UFC's London events.

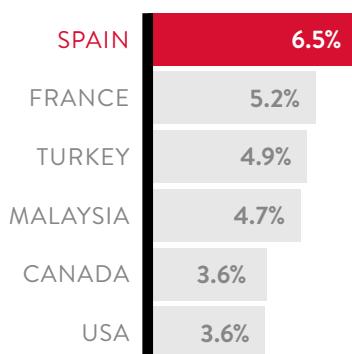
UFC: BIGGEST GROWTH MARKETS

INCREASE IN TOTAL POPULATION INTEREST 2014–2016



MMA: BIGGEST GROWTH MARKETS






INCREASE IN TOTAL POPULATION INTEREST 2014–2016



Source: Nielsen Sports SDNA

COUNTRIES MOST INTERESTED IN MMA



- 1 THAILAND 
- 2 MALAYSIA 
- 3 TURKEY 
- 4 SINGAPORE 
- 5 BRAZIL 

INSIGHT

THE UFC'S CONTENT STRATEGY

The UFC has developed and optimized a sophisticated content strategy, which is seeing the organisation flourish in many markets around the world – with the major markets of Brazil, Mexico and Russia recording the largest increases in interest since 2014 (indeed, Mexico is the market most interested in both mixed martial arts generally and UFC specifically).

In the United States, UFC has adopted a tiered-approach to the broadcasting of its major events. For events such as UFC 200, held in Las Vegas in July, which saw champion Miesha Tate take on Amanda Nunes, the evening's early fights are made available over its own OTT subscription

platform, UFC Fight Pass. The middle card fights, scheduled in prime time, are sold to traditional linear broadcasters – in the United States, Fox currently holds the broadcast rights to UFC. The headline fights, later in the evening, are then sold on a pay-per-view basis.

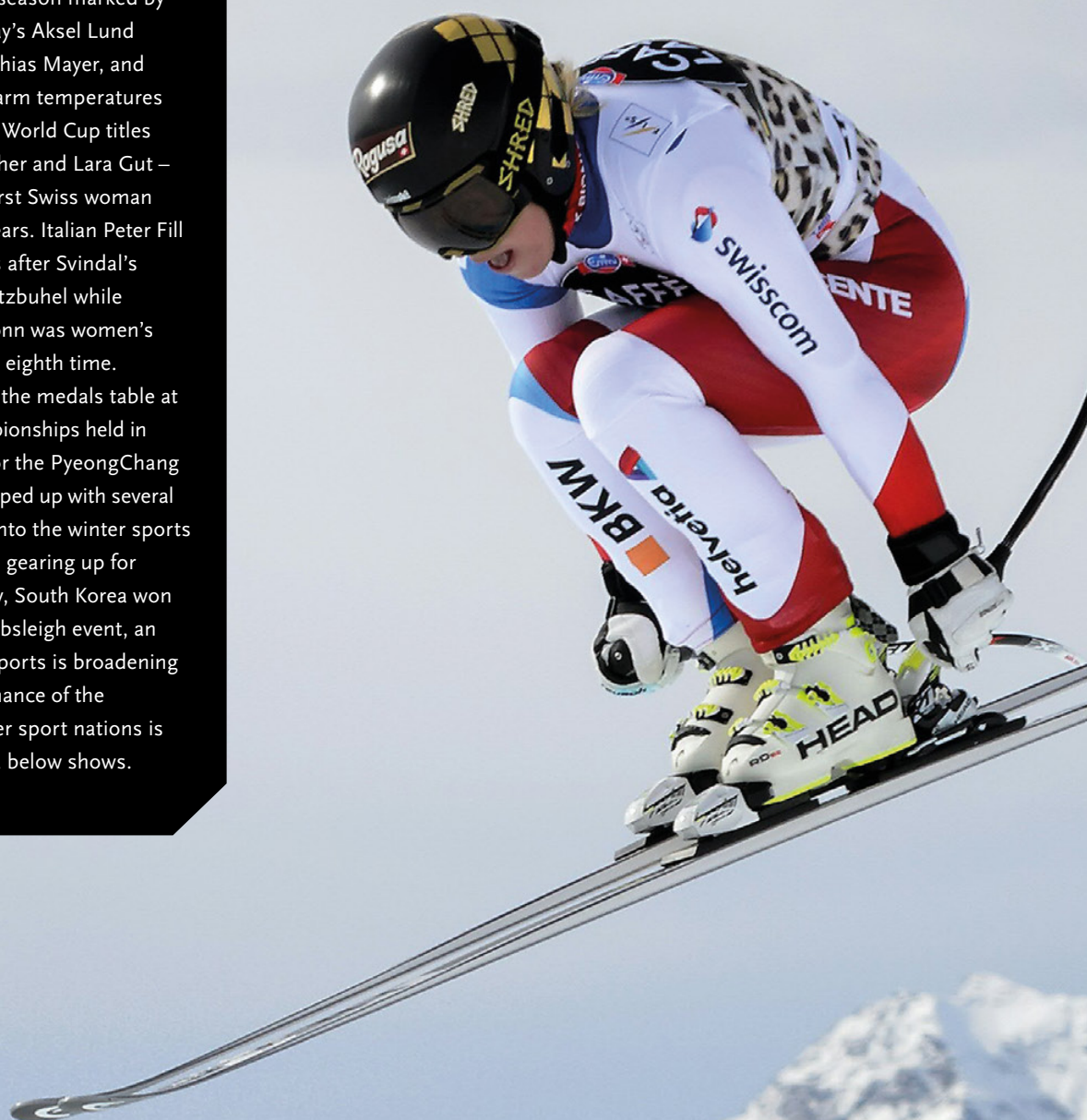
UFC supplements its event coverage with a range of shoulder programming, notably the Ultimate Fighter reality series which airs on Fox Sports 1 and UFC Fight Pass. The series follows a group of MMA fighters through a training and development competition, with the prize for the winner a UFC contract.



WINTER SPORTS

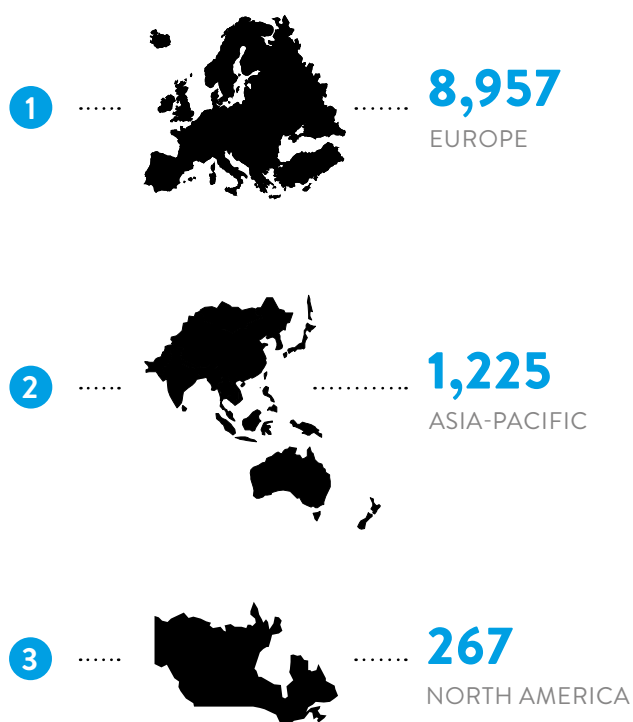
2016

— In an alpine skiing season marked by injuries, not least to Norway's Aksel Lund Svindal and Austrian Matthias Mayer, and postponements due to warm temperatures across Europe, the overall World Cup titles were won by Marcel Hirscher and Lara Gut – the latter becoming the first Swiss woman to take the crown for 20 years. Italian Peter Fill took the downhill honours after Svindal's season-ending crash at Kitzbuhel while the remarkable Lindsey Vonn was women's downhill champion for the eighth time. Elsewhere, France topped the medals table at the World Biathlon Championships held in Oslo, while preparation for the PyeongChang 2018 winter Olympics ramped up with several test events incorporated into the winter sports season. The home team is gearing up for the Games, too: in January, South Korea won its first ever World Cup bobsleigh event, an indication of how winter sports is broadening geographically. The dominance of the traditional European winter sport nations is clear, however, as the data below shows.



Lara Gut, in action here at St. Moritz, became the first Swiss woman in 20 years to win an overall World Cup title.

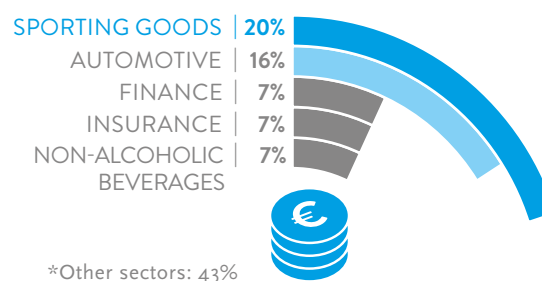
BROADCAST HOURS 2015/16 SEASON



Nielsen Sports Media Evaluation; global overview

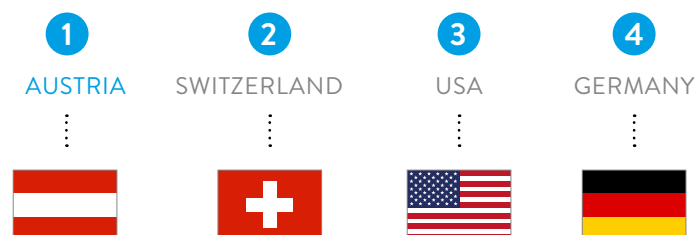
WINTER SPORTS SPONSORSHIP

SPONSORSHIP VOLUME BY INDUSTRY



SPONSORSHIP INVESTMENT

LEVELS OF SPONSORSHIP INVESTMENT BY MARKET



INSIGHT

THE WINTER SPORTS COMMERCIAL PLATFORM

STEPHAN SCHRÖDER, Co-Managing Director,
Nielsen Sports DACH:

► I think winter sports is very special in comparison to other sports because they are so focused on a limited amount of time during a year. Overall, there's nothing, other than football, as popular in a lot of mainly European countries during the winter season. It's a sport focused on TV – I think that will change but it's a big challenge for the winter sports business, because the sponsors are so focused on visibility on TV. Sponsors like Audi, the biggest winter sports sponsor right now, uses a lot of different events or sports to show its logos. Most sponsors are not engaged only in one event, they are normally engaged in several. The international fed-

erations are trying to improve the coverage in Asia. They are trying to push not only in Japan, where ski jumping is really popular, but in South Korea and China. They are trying also to be more popular in North America. You can see the International Ski Federation (FIS) trying to make the sport more global because they see that sponsors are looking for really international coverage.

The shift to digital is the biggest challenge winter sports has, but I think streaming and highlight clips could be very good because winter sports has a lot of nice, easily-packaged moments. The people responsible know that and I think sponsors will help push it – Audi, Viessmann and others are already going digital. ◀



BASKETBALL

2016

In a year when the NBA approved the sale of jersey sponsorships from the 2017–18 season, LeBron James led his Cleveland Cavaliers to the title in a dramatic Finals series against Golden State Warriors. The Warriors, led by Steph Curry, were the year's outstanding team in the regular season and 3–1 up in the best-of-seven finale, only for James, voted MVP for the third time in his career, to lead a remarkable recovery. A dramatic game five of the Women's NBA finals, meanwhile, saw Los Angeles Sparks crowned champions, beating Minnesota Lynx 3–2 in the series. Across the Atlantic, the Turkish Airlines Euroleague ended with CSKA Moscow defeating Fenerbahçe in Berlin to lift the trophy for a seventh time. In China, Sichuan Blue Whales were victorious in the Chinese Basketball Association (CBA), beating Liaoning Flying Leopards in the finals. At an international level, the Olympic titles were predictably taken by Team USA in Rio de Janeiro – the women beat Spain 101–72 in the final, while the men defeated Serbia 96–66.



LeBron James in action during game seven of the NBA Finals in June: Cleveland Cavaliers came from 3–1 down to beat Golden State Warriors.

INSIGHT

BLAZING A TRAIL: THE NBA IN CHINA

The National Basketball Association has led the way in terms of international sports leagues operating in China. In 2008, the NBA announced the formation of NBA China, a new entity to conduct all of the league's business in Greater China with five strategic partners: Disney/ ESPN, Bank of China Group Investment, Legend Holdings, China Merchant Group, and Li Ka Shing Foundation. At the time, **then-NBA Commissioner DAVID STERN** said: "The opportunity for basketball and the NBA in China is simply extraordinary." He added: "The expertise, resources and shared vision of these immensely successful companies will help us to achieve the potential we see in the region."

The strategic investment from these companies will allow us to continue working with the General Administration of Sports and the Chinese Basketball Association to grow our sport and emphasize, in both rural and urban Chinese communities, its contributions to fitness, healthy lifestyle and an appreciation of teamwork."



**NBA HAS
MORE THAN 110
MILLION FOLLOWERS
ON SOCIAL MEDIA
IN CHINA**

Today, the NBA is the most popular sports league in China with more than 110 million followers on social media. **More than 760 million fans watched the NBA in China during the 2015–16 season.** Media partners, including a partnership of 30 years with CCTV provide fans with unprecedented access to NBA games and content. **Tencent, the league's largest international partner, streams 600 live games and content to hundreds of millions users on Tencent platforms each year.**

**"THE OPPORTUNITY FOR
BASKETBALL AND
THE NBA IN CHINA IS SIMPLY
EXTRAORDINARY."**

As well as regular promotional visits by league stars such as LeBron James and Stephen Curry, the league has made China the centre of its annual pre-season Global Games series. In 2016, games in Shanghai and Beijing, involving the New Orleans Pelicans and Houston Rockets, marked the tenth edition of the NBA Global Games in China.

The festivities around the NBA Global Games China 2016 included the fifth NBA Fan Appreciation Day, plus NBA Cares and Jr. NBA community events. These double up as activation opportunities for league partners, while the NBA Global Games China series was presented this year by Master Kong; the NBA Fan Appreciation Day presenting sponsor was Dongfeng Nissan.

COMMERCIAL TRENDS IN SPORTS 2017

WHAT WE'RE SEEING...

1

THE EMERGENCE
OF NEW MARKETS,
LED BY CHINA

2

RICHER, DEEPER
PARTNERSHIPS BUILT
AROUND CONTENT

3

NEW AUDIENCES, NEW
HABITS AS THE
CATALYST FOR CHANGE

4

THE GREATER FUSION
OF SPORTS AND
ENTERTAINMENT

5

OTT AND SOCIAL
MEDIA ARE CREATING
NEW WAYS TO
CONSUME SPORTS

6

FULLY CONNECTED
FANS, ENABLED
BY TECHNOLOGY

7

THE NEXT STEPS IN THE
MONETIZATION OF
ESPORTS DIFFER ACROSS
THE VALUE CHAIN

8

SOCIAL
RESPONSIBILITY
DRIVING DECISION-
MAKING

9

DATA PLAYING THE
CENTRAL ROLE
IN OPTIMIZING FAN
RELATIONSHIPS

10

CRACKING THE
ROI CODE WILL
REMAIN THE BIGGEST
CHALLENGE



More insights will follow in our
Commercial Trends in Sport report,
early in 2017.

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