



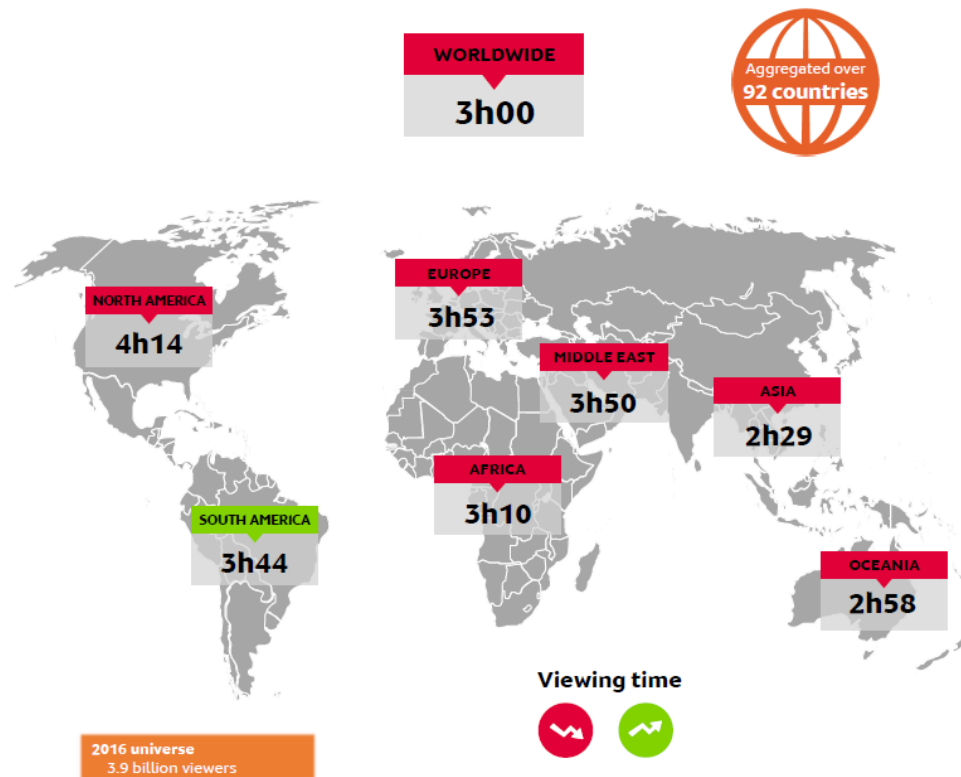
nielsen

2° FORUM SPORT & BUSINESS

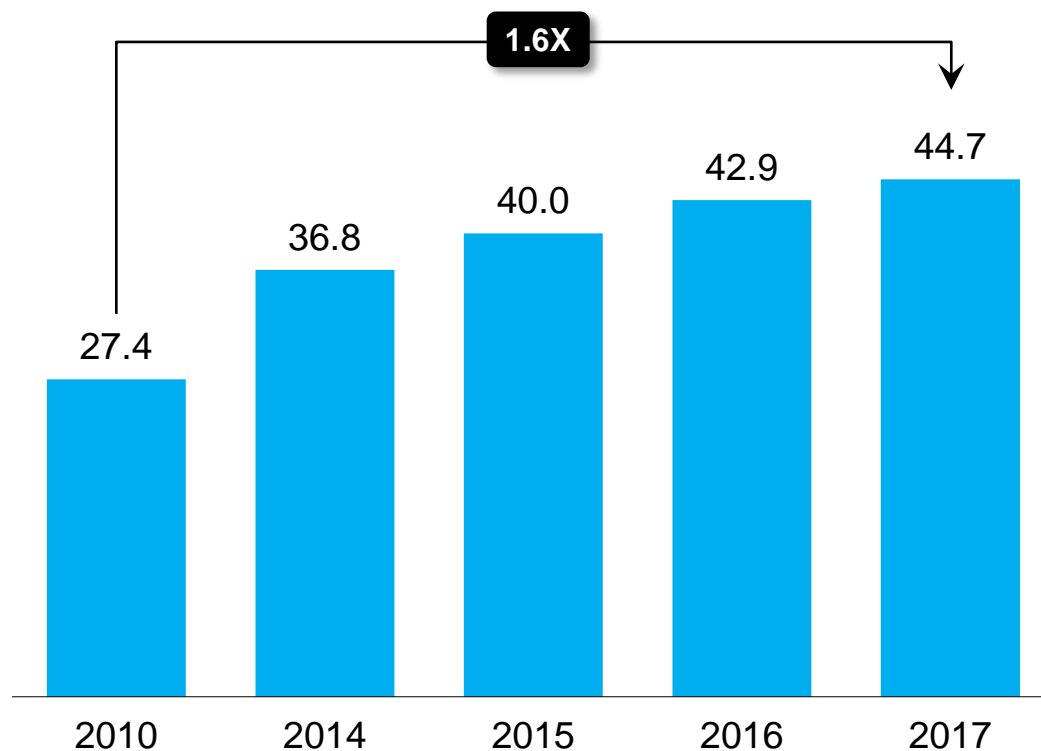
Trend internazionali e sviluppi nei prossimi anni

Glenn Lovett - Marco Nazzari
16/10/2017

DECLINING VIEWING TIME AND...



... INCREASING MEDIA RIGHTS SPEND



MEDIA RIGHTS

FACTORS FOR FUTURE GROWTH INCLUDE ...

- Continued economic development in Asia, Latin America and Africa.
- Increased pay TV and broadband penetration in key developing markets.
- Technological advances and changing viewer consumption habits.
- Aggressive new players entering the media rights landscape.

DIVERGING EVIDENCES

DECLINING VIEWERSHIP...

...INCREASING RIGHTS FEES

-8%

Average viewership per match



+3%

TV Ad revenues

-11%

Average viewership per match



Premier League

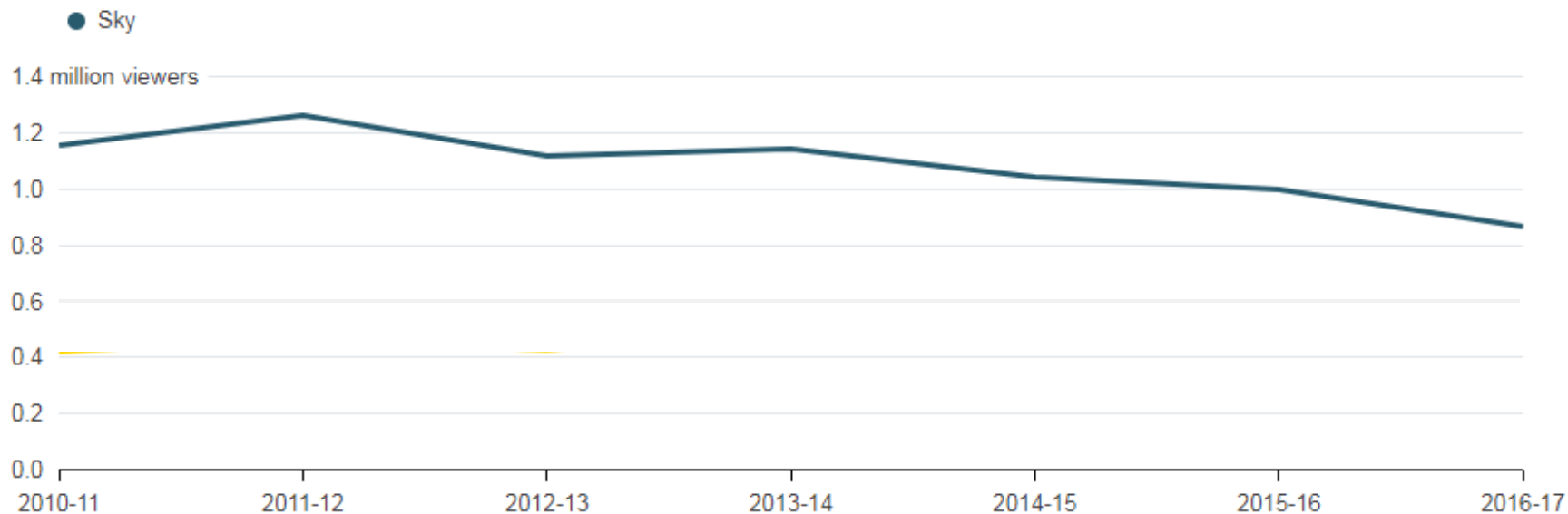
+70%

TV rights revenues



EPL CASE

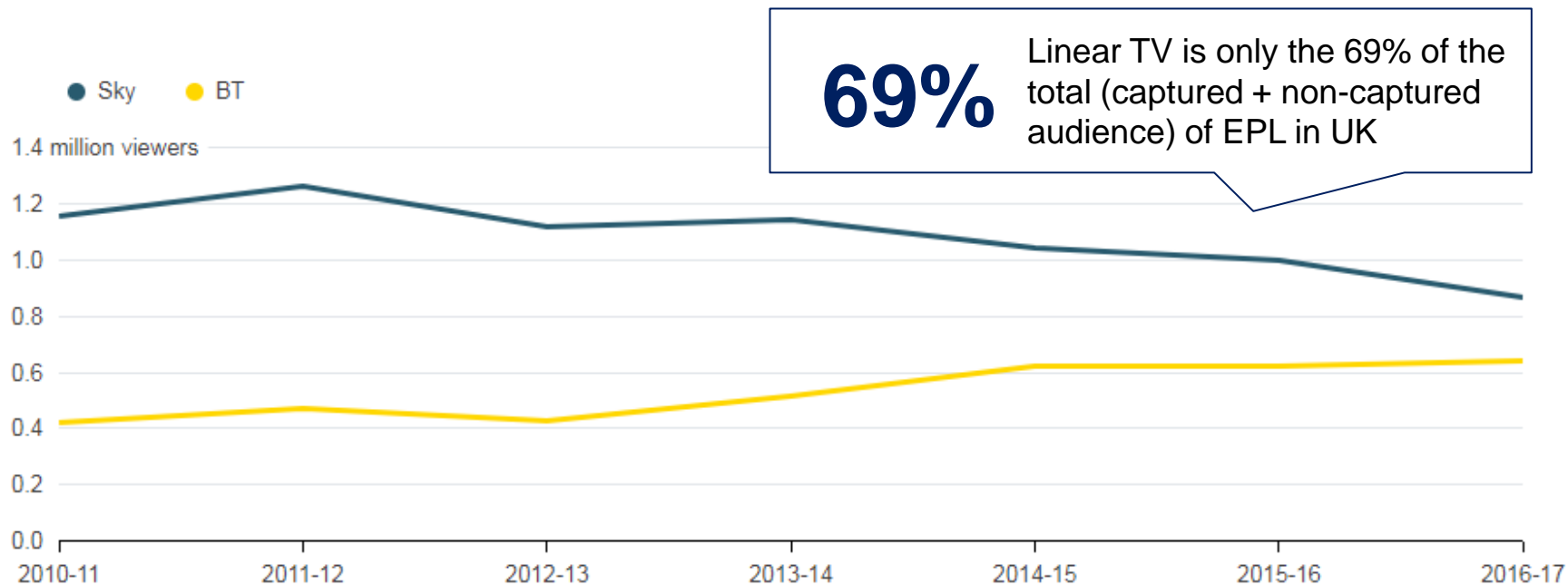
Average viewership trend – linear TV



Source: Broadcasters' Audience Research Board

EPL CASE

Average viewership trend – linear and online TV



Source: Broadcasters' Audience Research Board

TRENDS IN METRICS

New indicators are taking over



On-field

FROM

ATTENDANCE

TO

ENGAGEMENT



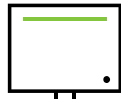
Digital & Social

FROM

IMPRESSIONS

TO

INTERACTIONS



TV

FROM

VIEWERSHIP

TO

SUBSCRIPTIONS



Target Group

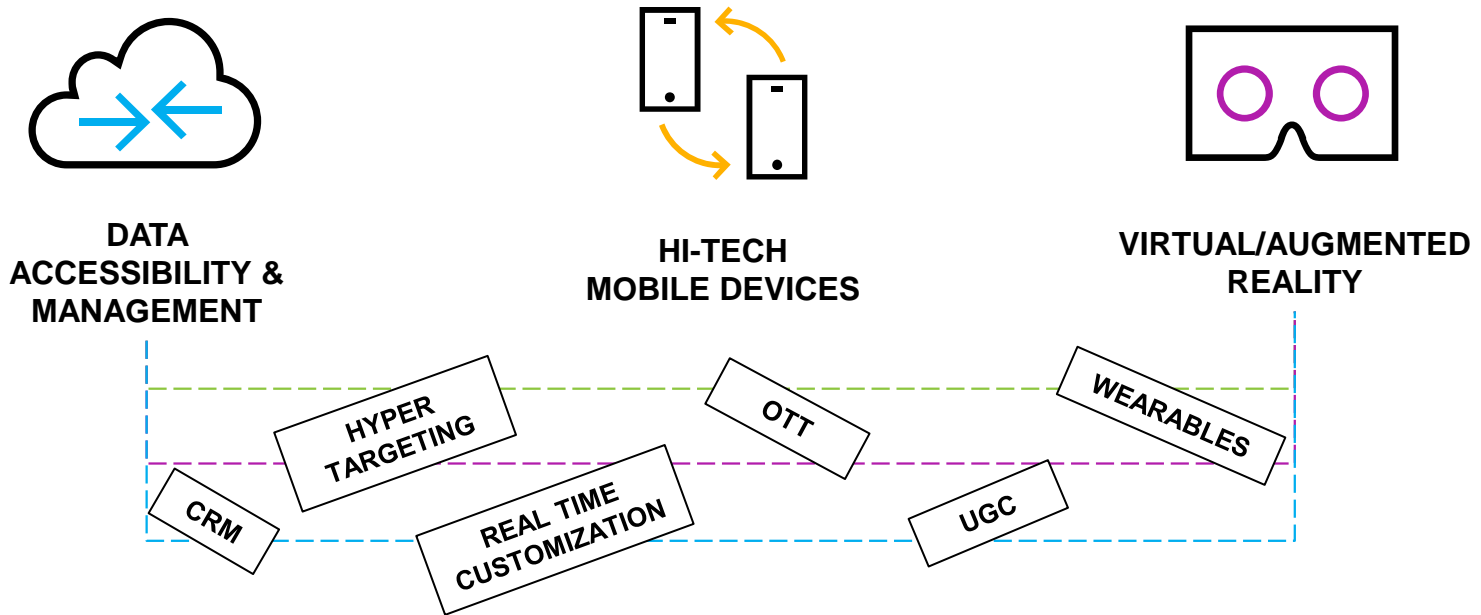
FROM

AUDIENCE

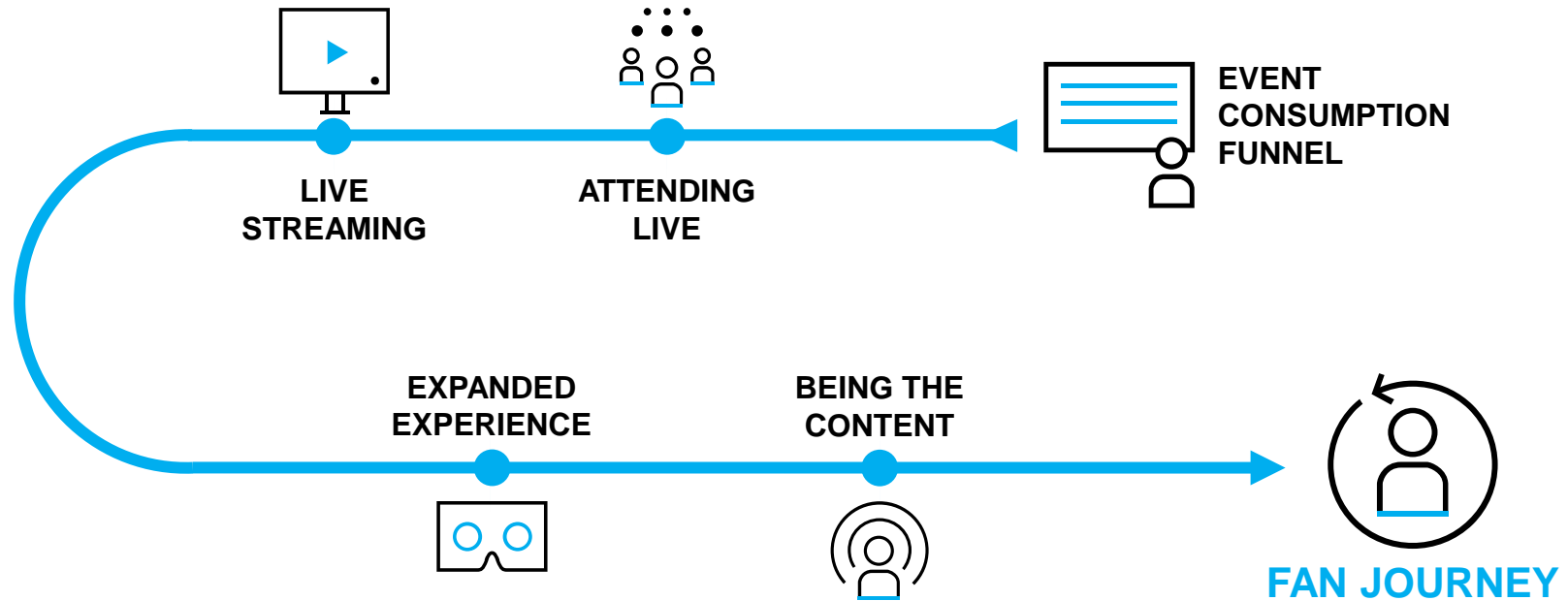
TO

ATTENTION

KEY TECH TRIGGERS



TECH IMPACT ON FAN JOURNEY





CONNECTED VENUES

CONNECTED VENUES

SECURITY

Hi-tech to effectively prevent and manage physical & digital threats



3 KEY AREAS OF IMPACT



FAN EXPERIENCE

Interacting live with the event, fans, venue offering, local services & amenities



AUTOMATION & INTEGRATION

IoT to collect fans analytics, implement integrated services platform, and enable everything

TODAY IN USA > LEVI'S STADIUM

Levi's stadium app: *"knowing everything about fan experience, so to remove all frictions and make live experience to beat home experience"*

KPIs 1-YEAR AFTER OPENING:

- 30%** ▶ *App adoption (vs 5% industry standard)*
- 200k** ▶ *# of fans with data collected (x12 before the new tech)*
- 65%** ▶ *of season tickets linked to the app functions*
- \$2M** ▶ *Revenues generated through the app in F&B, merchandising, parking, in-app sponsorships*

KEY ACTIVITIES ENABLED:

- Mobile ticketing** > fast access to events, amenities, parking
- Seats upgrade** > option available once at the stadium
- Unused season tickets monetization** > trough secondary market or as upgrade/other services
- Food & Beverage** > pre-order & pick-up during events
- Content on demand** > personalized video as multi-angle playback 5-7 seconds after the action
- Venue navigation** > guests can virtually explore the stadium to find what they need
- Customized notification** > e.g. now wait lines at a specific stands
- Predictive analytics** > give VIP treatment to a season ticket holders who probably is not going to renew

TOMORROW IN EU > ENGLISH CLUBS

MEDIA STREAMING

- Different camera angles
- Athlete tracking
- Replays
- Statistics & Live voting

PARKING ACCESS

- In-stadium directional guidance
- Payment through app
- Real time slot availability
- Availability and slot pre-booking

SOCIAL MEDIA

- Facebook shares
- Twitter connect
- Chat rooms
- Club & fan sites



Source: Wipro Digital

SHOPPING

- Merchandise purchase
- Food & beverage
- Service-to-seat

MY TEAM

- Franchise services
- VIP offers
- Schedule

EVENT SALES

- Seat upgrades
- Promotions
- Future bookings



LIVE STREAMING & OTT

LIVE STREAMING & OTT

FACEBOOK

Facebook posted the second-highest bid (\$610M) in order to win exclusive IPL (Indian cricket league) streaming rights



Summary - @starindia wins @Vivo_India #IPLMediaRights Invitation to Tender for INR 16,347.50 Crore (US \$2.55 billion)

Traduci dalla lingua originale: inglese

IPL MEDIA RIGHTS - 2018 TO 2021 - BIDS SUMMARY													AMT IN CR		
BIDDERS / BID	BIDN	SUPERPOST	FOLLOWON	VUMP	TV	CON	FACEBOOK	APPLE	STAR	SMARTFICH	SONY	ECONET	PERFORMA	3D	THIRDEST BID
SHREEK SHYAM / INTERNATIONAL BIDS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11,000.00
Indian Sub Continent Tv	0.00	0.00	0.00	0.00	1,74,00,00,00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,00,00,00,00
Indian Sub Continent Digital	0.00	0.00	0.00	0.00	1,74,00,00,00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1,00,00,00,00
NOW - A	0.00	0.00	0.00	0.00	13,50,00,00,00	0.00	0.00	0.00	11,00,00,00,00	0.00	0.00	0.00	0.00	0.00	70,00,00,00,00
NOW - B	0.00	0.00	0.00	0.00	13,50,00,00,00	0.00	0.00	0.00	11,00,00,00,00	0.00	0.00	0.00	0.00	0.00	70,00,00,00,00
NOW - C	0.00	0.00	0.00	0.00	13,50,00,00,00	0.00	0.00	0.00	11,00,00,00,00	0.00	0.00	0.00	0.00	0.00	70,00,00,00,00
NOW - D	0.00	0.00	0.00	0.00	13,50,00,00,00	0.00	0.00	0.00	11,00,00,00,00	0.00	0.00	0.00	0.00	0.00	70,00,00,00,00
NOW - E	0.00	0.00	0.00	0.00	13,50,00,00,00	0.00	0.00	0.00	11,00,00,00,00	0.00	0.00	0.00	0.00	0.00	70,00,00,00,00
NOW - F	0.00	0.00	0.00	0.00	13,50,00,00,00	0.00	0.00	0.00	11,00,00,00,00	0.00	0.00	0.00	0.00	0.00	70,00,00,00,00
TOTAL MEDIA RIGHTS / INTERNATIONAL BIDS	0.00	0.00	0.00	0.00	1,74,00,00,00,00	0.00	0.00	0.00	11,00,00,00,00	0.00	0.00	0.00	0.00	0.00	1,00,00,00,00,00

TWITTER

2016 → \$10M

2017 → \$50M

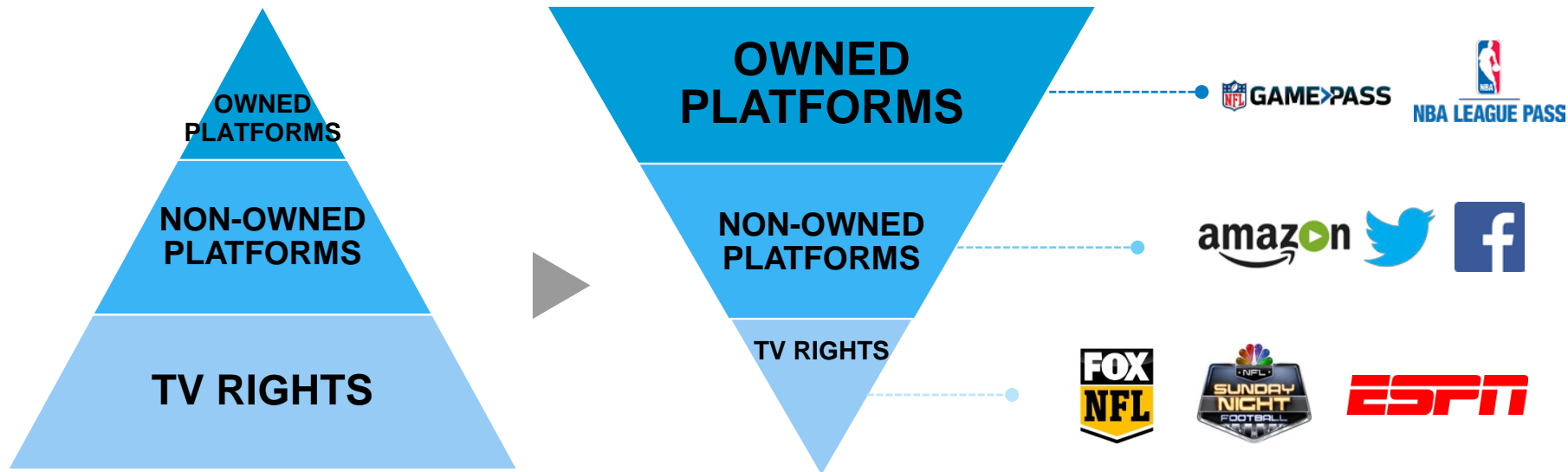
Starting since Aug 29th, however, the NFL debuted its new, 30-minute live show, called #NFLBlitz, on Twitter

AMAZON

Amazon recently acquired the main e-sports streaming platform, and won last NFL exclusive Thursday Night match streaming rights for \$50M.



FUTURE IS NOW



▶ Live television audiences are decreasing when it comes to today's sports games. ◀
 Increasingly, audiences are going digital, consuming sports via social media and online streaming.

LIVE STREAMING CASE > BT & UEFA CL

UK broadcaster BT Sport decided that streaming a big match live on social media could create a step-change in engagement with (and sales to) hard-to-reach prospects. Finally, one of the less visible, but equally important, breakthroughs was establishing live streaming internally as a viable and successful strategy for engaging with prospects and delivering real business results.

KPIs IN THE CAMPAIGN:

+11%



BT Sport familiarity increase after the campaign.

140k



BT new YouTube subscribers

+12%

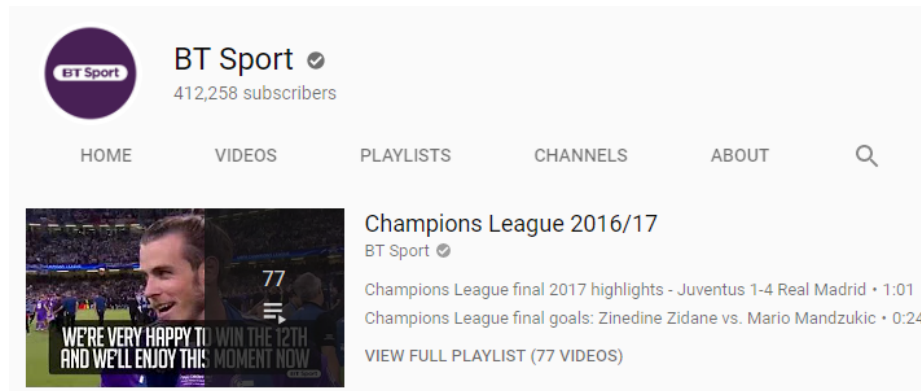


BT Sport consideration increase after the campaign.

4.3 M



Cookie pool width in terms of viewers



LIVE STREAMING CASE > REAL MADRID

More than one year ago, Real Madrid partnered with Grabyo, a cloud-based video platform, as it sought to move Real Madrid TV, the club's own channel, beyond the confines of linear TV. Only the first six months, the club's broadcast channel has gone live on Facebook 128 times, generating millions video views and having its content appear in social feeds more than one billion times. This activity highlighted once again the potential of OTT content.

KPIs IN THE CAMPAIGN:

110M

▶ *Real Madrid's streaming video views in six months*

+1 billion

▶ *Times Real Madrid contents appeared in social feeds during those six months*





EXPANDED REALITY

VIRTUAL & AUGMENTED REALITY

ENGAGEMENT

Bringing fans closer to action with groundbreaking VR technology



3 KEY AREAS OF IMPACT



TICKETING

Right-holders are able to sell “tickets” even when venues go sold-out



SPONSORSHIPS

Sponsor brands visibility results amplified, with future possibilities of “tracking” fans views. Virtual sponsorship takes this even further, with the ability to show different ads to different VR users during the same game

AR CASE > SENNA: THE HEART OF BRAZIL

Ayrton Senna Institute, a Brazilian NGO, drove an augmented reality campaign to gather support for Brazilian athletes during the Rio 2016 Olympic Games. Even 20 years after his death, Senna was alive in that moment, bringing emotion, motivation and sending a personal message to each athlete. Imagine how it could work if applied on brands and their audiences.

KPIs IN THE CAMPAIGN:

+8h

- ▶ *Time Ayrton Senna's bracelets appeared during official broadcast*

900k

- ▶ *R\$ earned selling NGO's wristbands*

2k

- ▶ *The original amount of bracelets (designed for athletes)*

60k

- ▶ *Bracelets sold at the end of the campaign*



VR CASE > NBA LEAGUE PASS VR

The NBA is partnering with NextVR, a leading broadcaster of live events in virtual reality, to bring NBA LEAGUE PASS subscribers select games of the 2016-17 regular NBA season live, and on-demand, in virtual reality. This amplifies sponsorships and ticketing opportunities both for league and teams.

ACTIVITY KPIs:

\$200

- ▶ *NBA League Pass account annual cost (per subscriber)*

\$7

- ▶ *À-la-carte option cost per game*

2015

- ▶ *Year when the first game of the season has been streamed in 360° video*





BEING THE CONTENT

BEING THE CONTENT > CELEBRITIES



SPORT STATS

ENDORSEMENT

CHARITY

GAMING



CONTENT PLATFORM

BEING THE CONTENT > PARTICIPANTS



PURCHASE
FUNNEL

PRODUCT USAGE

BRAND ADVOCATE

EXPERIENCE &
VIRALIZATION



INSIGHTS
PLATFORM

SPORTSWEAR CASE > UNDER ARMOUR

Sports apparel and connected fitness companies are increasingly figuring out how to collect and use data on users' workouts, calories burned and more in order to act as a "virtual coach" to help them meet their health and fitness goals. One great case study is the 2015 acquisition by **Under Armour** of 2 apps, MyFitnessPal and Endomondo, for a combined investment of **USD 560 mln**

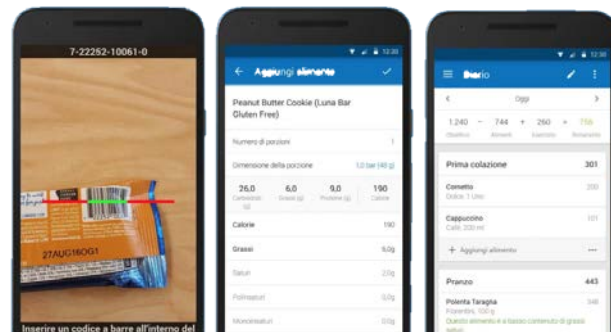
WHAT THEY DID AND THE BENEFITS



myfitnesspal



- MyFitnessPal is a social fitness app providing nutritional information for over five million foods and that allows to log calories, record exercise, and compete with friends to lose weight.
- Endomondo is also a social fitness network tracking workouts, analyzing performance, and connecting with friends while acting as a personal trainer.
- When acquired the 2 apps together had more than 100 mln users vs the almost 30 of Nike+
- The apps offer direct connection to Under Armour online store



BANKING CASE > EMIRATES NBD

Starting from UAE problems with obesity and consumer debt, Emirates NBD, one of the leading national banks, created a fitness-related app ("Fitness Account") using gamification to enable the interest rate on people's savings to change, on a day-to-day basis according with their fitness activity (steps taken)

KPIs IN 5-MONTH ACTIVITY:

- 2,559** ▶ *New accounts opened*
- +\$20M** ▶ *Incremental savings*
- x2,86** ▶ *Media ROI (\$430k earned media vs \$150k marcomm spend)*
- 287M** ▶ *Steps taken (with a 40% increase month on month)*





THANK YOU!