

INSIGHTS REPORT - EMEA

# Reaching new sports audiences on social video



# Sports is one of the last types of live entertainment that people are still watching on TV. So why should sports leagues & teams, as well as broadcasters, care about social video?

If these creators continue following traditional ways of sports marketing, they risk missing out on opportunities to engage younger viewers and fans, grow female audiences, and satisfy a growing demand for digital-first experiences.

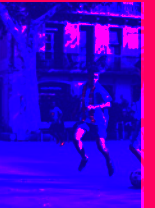
In this report, we look at how sports media creators are adapting their social video content to resonate with younger audiences and close the gender gap in sports.

## 01.

### YOUNGER AUDIENCES' VIEWING PREFERENCES ARE CHANGING

Young audiences want to be immersed in sports events through an always-on social media approach. They want to engage with authentic, meaningful stories which cover more than the actual game or event itself.

In this new environment, creating emotional connections and transcending sports through people's lives is critical for broadcasters, as well as leagues & teams.



## 02.

### FEMALE FANS ARE KEY FOR AUDIENCE GROWTH

Female fans aren't unicorns, but they've long been ignored. This provides a pivotal opportunity for sports creators to grow their audiences and show a more diverse, inclusive spirit.



## 03.

### ONLINE EXPERIENCES LIKE ESPORTS ARE POTENTIAL COMPETITION

Sports audiences are interested in digital experiences that create fandom — like esports — and may steal watchtime from traditional sports events.

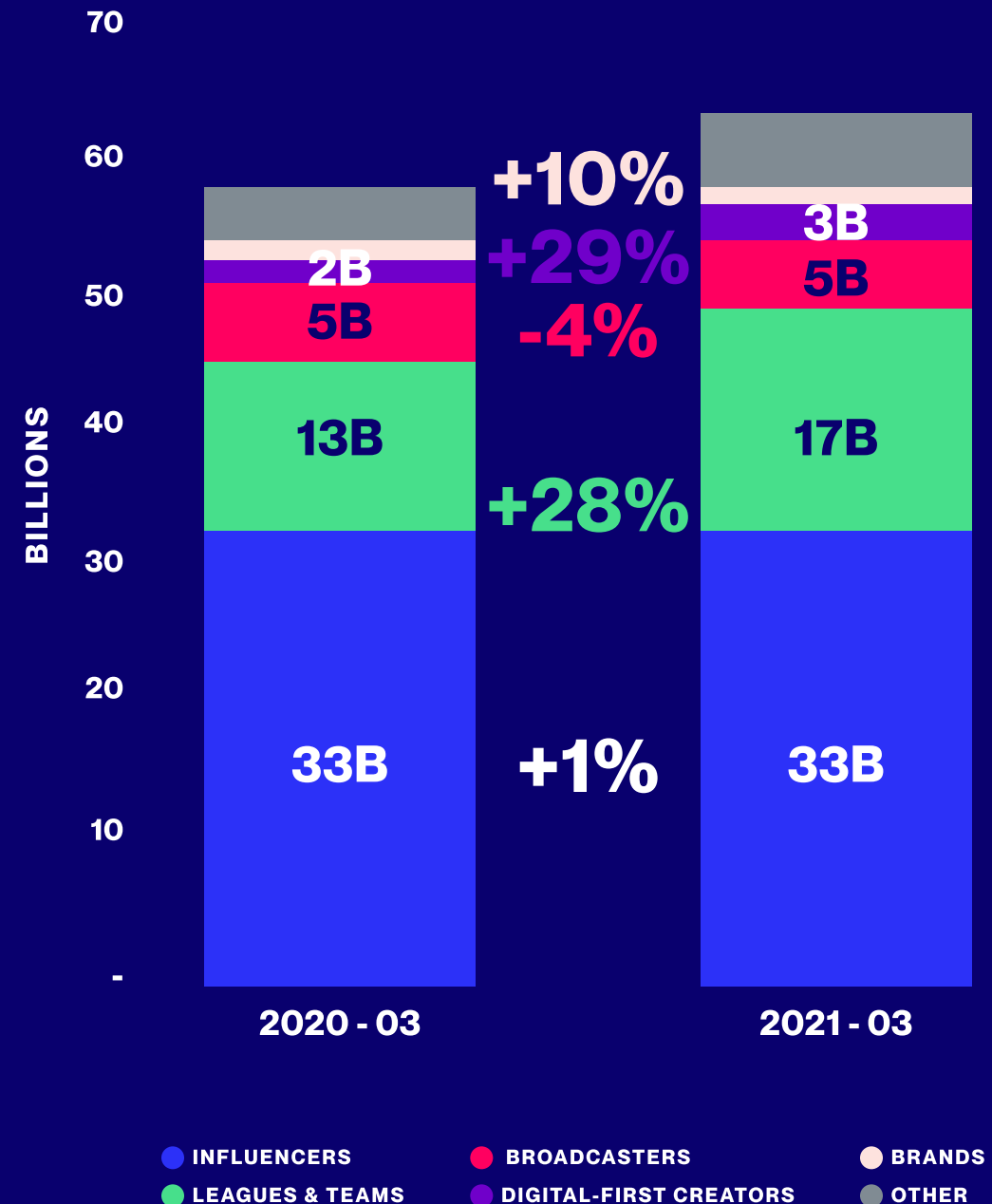


# While sports overall saw watchtime growth on social video over the last year, not all creator types benefited equally.

Without live sports, the pandemic made it hard for sports creators to provide their fans with content. Some creator types, like leagues & teams or digital-first sports influencers, found a way to grow watchtime with their audiences despite the challenges.

Even though live sports are now back, broadcasters have struggled to satisfy the growing demand for sports content on social video.

## TOP 1000 SPORTS CREATORS BY TYPE MINUTES WATCHED



Source: Tubular Labs | Audience Ratings | Minutes Watched (Based On 30-Second Views) | Cross-Platform (YouTube+Facebook) | Top 1000 Sports Creators By Type | March 2021

**Traditional broadcasters like ESPN and BT Sport are among EMEA's top creators, reaching the largest audience on social video.**

**However leagues & teams and digital-first creators dominate the top sports creators.**



**TOP EMEA SPORTS MEDIA CREATORS BY GLOBAL UNIQUE VIEWERS**

RANK	TUBULAR CREATORS	APR UNIQUE VIEWERS
1	<b>ESPN UK</b>	<b>87.2M</b>
2	<b>ICC - International Cricket Council</b>	<b>45.7M</b>
3	<b>UFC</b>	<b>42.1M</b>
4	<b>FC Barcelona</b>	<b>40.3M</b>
5	<b>Goal en Espanol</b>	<b>30M</b>
6	<b>SPORTbible</b>	<b>29.9M</b>
7	<b>UEFA Champions League</b>	<b>27.4M</b>
8	<b>Oh My Goal - France</b>	<b>24.8M</b>
9	<b>LaLiga</b>	<b>24.3M</b>
10	<b>BT Sport</b>	<b>24M</b>
11	<b>Premier League</b>	<b>19.1M</b>
12	<b>Olympics</b>	<b>18.5M</b>
13	<b>Real Madrid C.F</b>	<b>16.8M</b>
14	<b>GiveMeSport</b>	<b>16.1M</b>
15	<b>Chelsea Football Club</b>	<b>14.8M</b>

■ LEAGUES & TEAMS ■ BROADCASTERS ■ DIGITAL-FIRST

Source: Tubular Labs | Audience Ratings | Unique Viewers (Based On 30-Second Views) | Cross-Platform (YouTube+Facebook) | UK, France, Germany, Spain, Italy, And Portugal Sports Creators | Global Audience | April 2021



# 01

## Younger Audiences' Viewing Preferences Are Changing

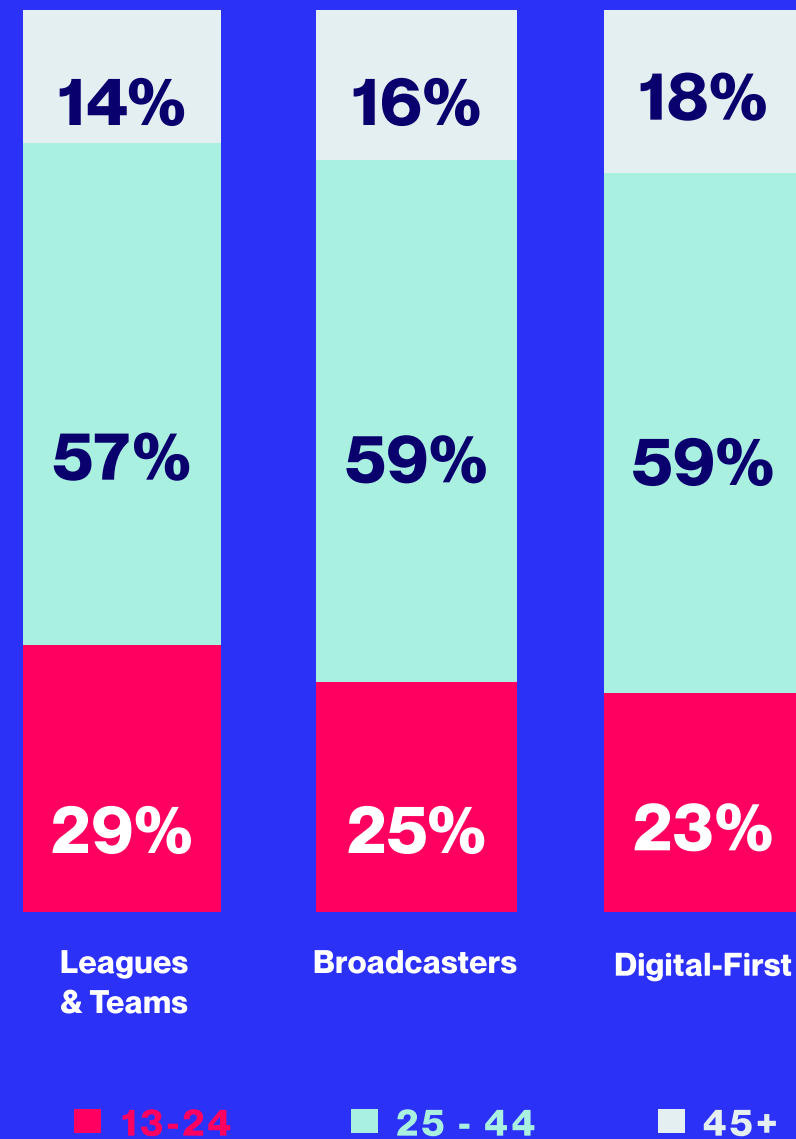


# Leagues & teams in EMEA reached more younger audiences than traditional broadcasters and digital-first media.

Leagues & teams in EMEA are not only dominating the top 10 leaderboard, but they are also managing to reach a higher share of **younger** audiences with their social video offering.

In the following analysis, we look at the content strategies of the top-performing leagues & teams, broadcasters, and digital-first creators to understand how they package sports content to reach and engage these audiences through social video.

AUDIENCE COMPOSITION FOR THE TOP 10 EMEA SPORTS BROADCASTERS, LEAGUES & TEAMS, AND DIGITAL-FIRST SPORTS CREATORS (AVG)



Source: Tubular Labs | Audience Ratings | Audience Composition For Unique Viewers (Based On 30-Second Views) | Cross-Platform (YouTube+Facebook) | Averages Based On Top 10 EMEA (UK, France, Germany, Spain, Italy, Switzerland, Portugal) Leagues & Teams, Sports Broadcaster Channels, Sports Digital-First Channels, And Influencers | Global Audience | April 2021

# Leagues & teams in Europe leverage classic sports moments and put their top athletes at the core of their content strategy.

Leagues & teams in EMEA let fans relive memorable sports moments of the past, and help younger audience newly discover such moments. These sports classics videos deliver comparatively higher viewership (21.7M views in the first 30 days on average).

Leagues & teams in EMEA also successfully incorporate their talent and athletes into video content, highlighting both their stars' skills and personalities.

At the same time, younger generations are often losing the deep connection with a sport that older generations have developed through learning and playing the sport themselves.

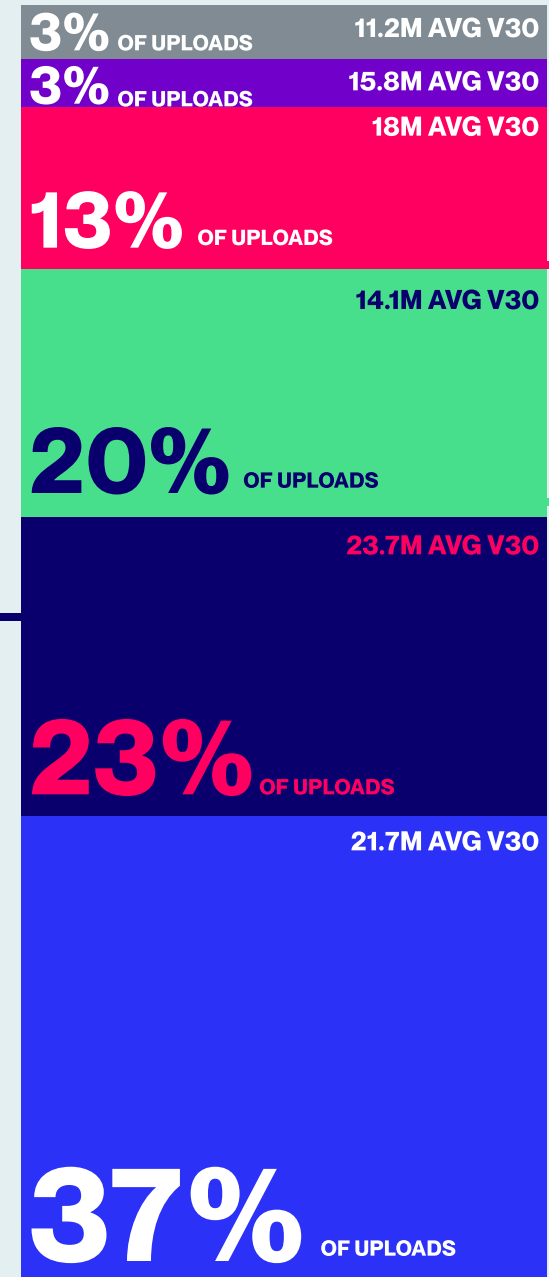
Leagues & teams can move beyond highlight-focused content and leverage their position as governing bodies of their respective sports to nurture a deeper connection between new fans and the sport itself on social video.

## TOP SPORTS LEAGUES & TEAMS BY FORMAT

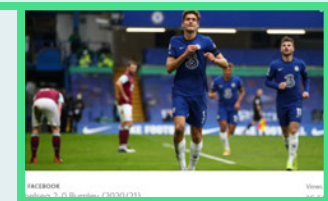
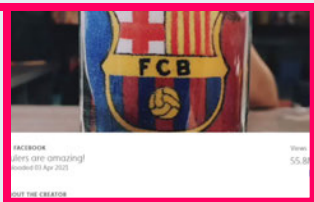
The ICC not only puts top athletes in the spotlight, but makes an entertaining “funniest moments” video that shows the human, funny side of its top players.



- SPORTS CLASSICS
- ATHLETE SPOTLIGHT
- HIGHLIGHTS
- SPORTS ENTERTAINMENT/ SIDE CONTENT
- PROMOTIONS OF UPCOMING EVENT
- BEHIND THE SCENES



Sports is not only about the games and trophies, but it's also about the passion, the fans, and the community. This side content shared by FC Barcelona shows an artist recreating the famous club's coat of arm with colored sand.



A highlight video, like this one from Chelsea Football Club, is always a good idea and a guaranteed success after a game, especially when your team wins!

Source Tubular Labs | Intelligence | Facebook | Selected Top 10 Sports Broadcasters, Digital-First, And Teams & Leagues (UK, France, Germany, Italy, Spain, Switzerland) | Based On Top 30 Videos By V30 Views | Videos Uploaded Last 365 Days | Data As Of June 3rd, 2021

**Broadcasters tend to favor game highlights. However, they also recognize a demand for content that emphasizes how the sport, athletes, and off-the-field engagements resonate with fans and sports communities.**

Game highlights are at the center of EMEA sports broadcasters' strategy, distinguishing them from digital-first creators and influencers who don't have the rights to this type of content.

However, other formats like sports entertainment/side content, athlete spotlights, and sports classics show a strong V30 performance and are a good way for broadcasters to complement their TV offering and create a connection with fans they don't necessarily reach on television.

## TOP SPORTS BROADCASTERS BY FORMAT



Source Tubular Labs | Intelligence | Facebook | Selected Top 10 Sports Broadcasters, Digital-First, And Teams & Leagues (UK, France, Germany, Italy, Spain, Switzerland) | Based On Top 30 Videos By V30 Views | Videos Uploaded Last 365 Days | Data As Of June 3rd, 2021

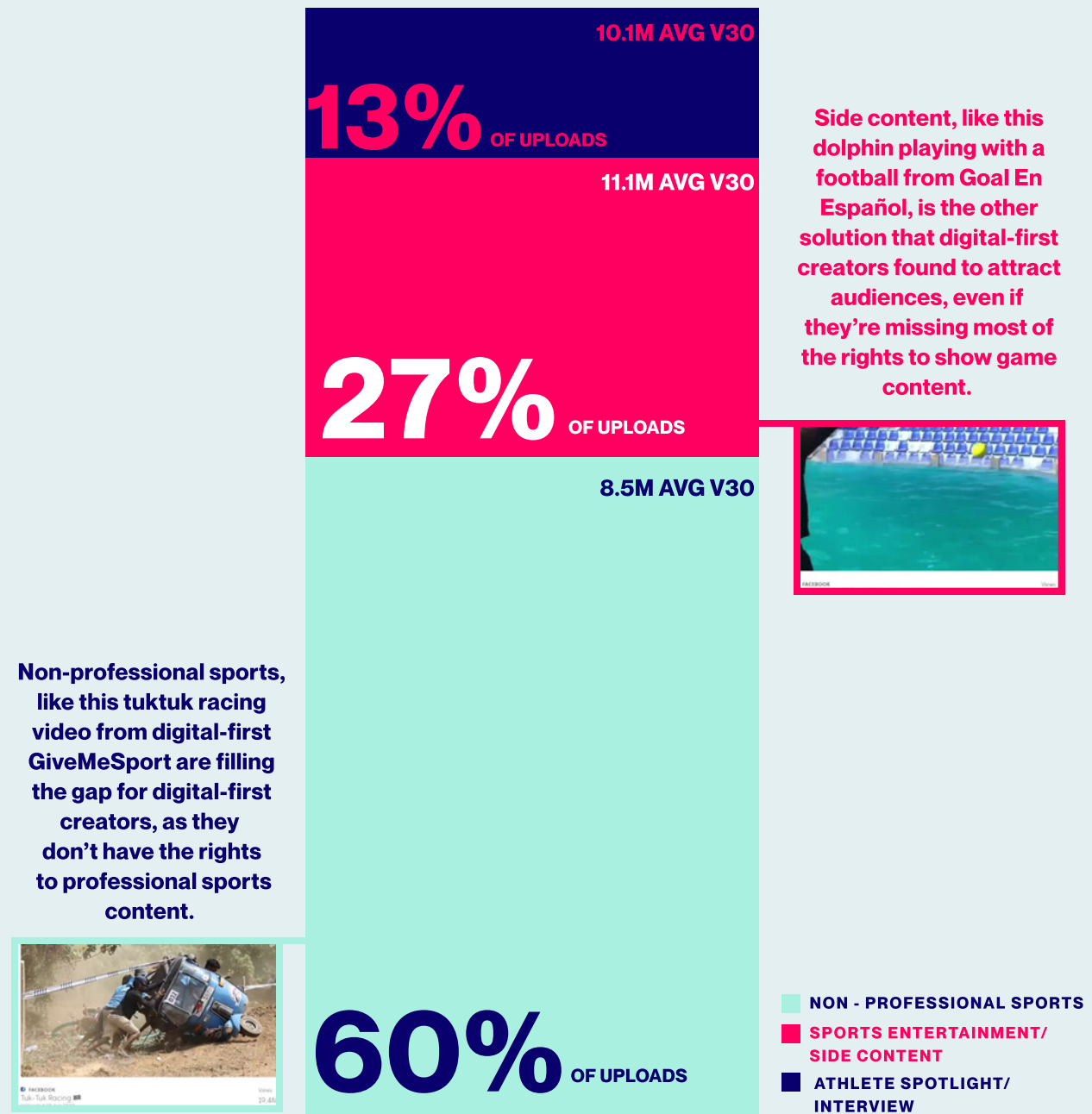


# Digital-first creators in EMEA often turn to non-professional sports and sports entertainment in order to reach their audiences.

Since digital-first creators don't own the rights to professional content, non-professional sports and sports entertainment videos are fundamental to their content strategy.

Non-professional sports or sports entertainment, involving funny or heartwarming moments not directly related to a game, perform really well for digital-first creators (average V30 of 11.1M views).

## TOP DIGITAL-FIRST CREATORS BY FORMAT



Source Tubular Labs | Intelligence | Facebook | Selected Top 10 Sports Broadcasters, Digital-First, And Teams & Leagues (UK, France, Germany, Italy, Spain, Switzerland) | Based On Top 30 Videos By V30 Views | Videos Uploaded Last 365 Days | Data As Of June 3rd, 2021

# 02



## Female Fans Are Key for Audience Growth

**Women are sports fans too but they have often been ignored. Sports creators need to adapt to women's viewing preferences if they want to grow.**

**In the following section, we dive into the content strategy of the top creators reaching the most female fans, and the power of women's sports for growing both male and female audiences.**



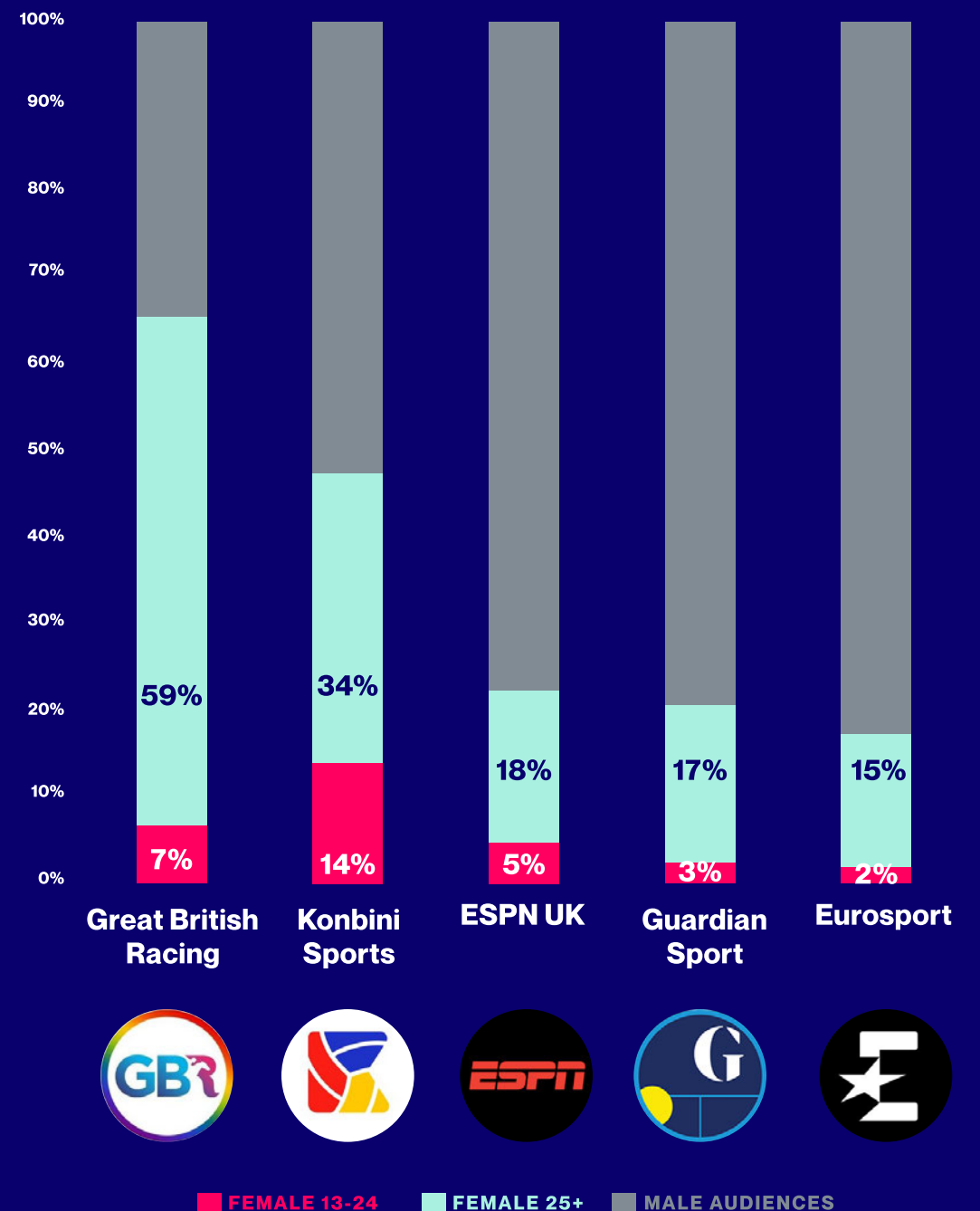
# Great British Racing and digital-first creator Konbini showed by far the highest female audience composition in EMEA.

These sports media channels are doing a great job reaching a high share of female audiences. While most of them are still far from reaching a share that's representative of the total female sports fan base, their content strategies resonated with female sports viewers — more than other sports channels did.

While Great British Racing has a massive share of female viewers over 25 (59%), Konbini Sports manages to reach particularly younger female audiences (14% female audiences 13-24).

Let's look more closely at what content these creators offer female audiences.

EMEA SPORTS CHANNELS (W/O LEAGUES & TEAMS)  
RANKED BY HIGHEST FEMALE AUDIENCE COMPOSITION



Source: Tubular Labs | Audience Ratings | Audience Composition For Unique Viewers (Based On 30-Second Views) | Cross-Platform (YouTube+Facebook) | EU 5 Sports Media Creators W/O Teams & Leagues, 0.3M Unique Female Viewers Threshold | Global Audience | April 2021

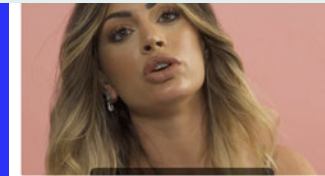
**Konbini and ESPN's content features young girls' athletic achievements, background on athletes' private life, and entertaining non-sports content, all of which resonates with female audiences.**

While sports like horse racing reach a high share of female audiences, it's also about the formats and topics these companies are choosing. Kids' sports videos, background stories, and non-sports entertainment were part of these two creators' top content.



**Konbini Sports**  
**48% Female Audience**  
**1M Female Unique Viewers In April**

**Interview-style videos with athletes, athletes' partners, or coaches helped Konbini reach female viewers.**



**"Je suis Femme De Footballeur"**  
 #1 Konbini Sports Video YTD  
 (2.8M V30 Views)



**"J'ai Sauvé 103 Enfants En Faisant Le Vendée Globe"**  
 #In Top 10 Konbini Sports Videos YTD  
 (60k V30 Views)

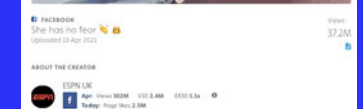


**ESPN UK**  
**23% Female Audience**  
**19.7M Female Unique Viewers In April**

**Content featuring kids and young girls' sports achievements, as well as non-sports-related hero stories and entertainment, characterize the top videos watched by women for ESPN UK.**



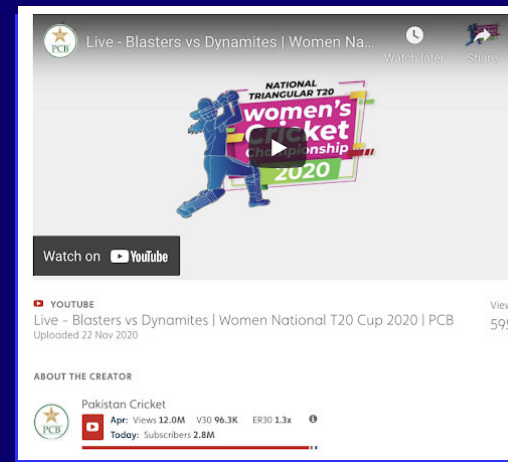
**"What A Hero"**  
 #1 ESPN UK Video YTD  
 (67M V30 Views)



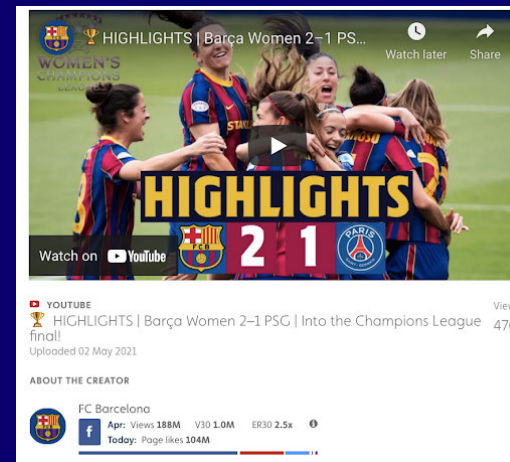
**"She Has No Fear"**  
 #5 ESPN UK Video YTD  
 (36.6M V30 Views)

Source: Tubular Labs | Audience Ratings | Audience Composition For Unique Viewers (Based On 30-Second Views) | Cross-Platform (YouTube+Facebook) | EU5 Sports Media Creators (Excl. Teams & Leagues) | Global Audience | April 2021

# Women's sports are seeing increasing audience interest across all genders.



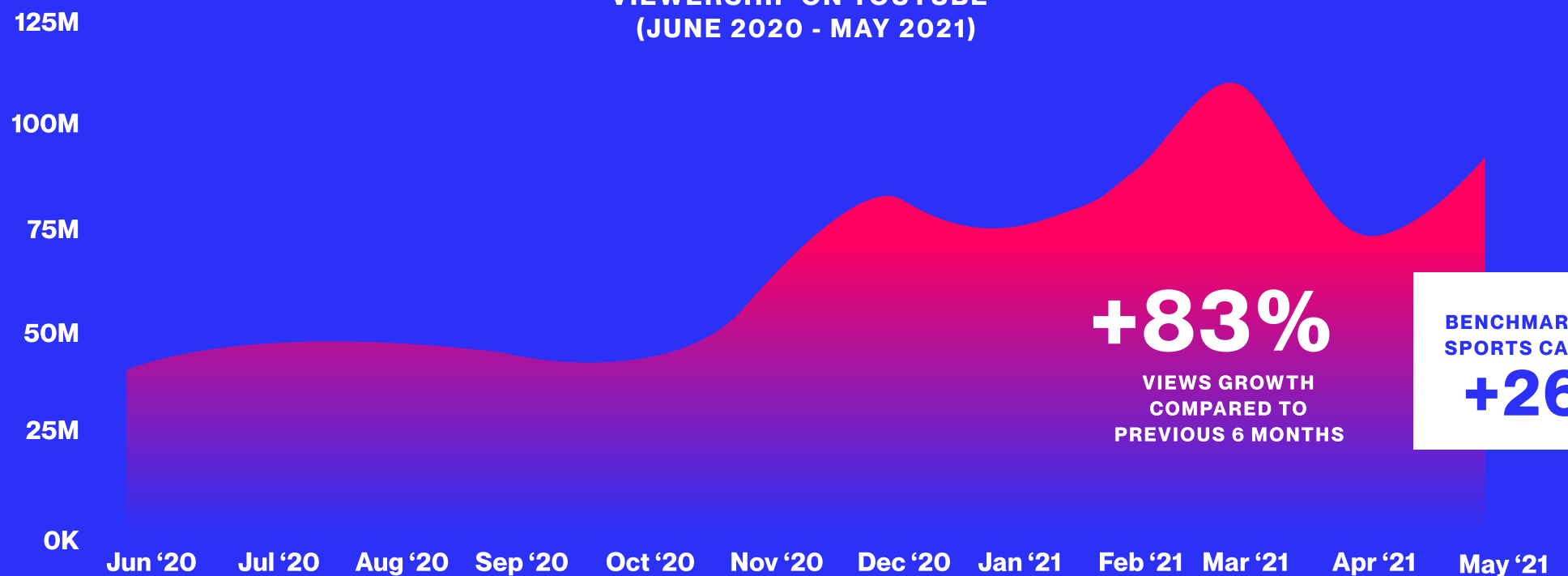
**Women's Cricket**  
#2 Women's Sports Media Video By V30 Views In The Last 365 Days



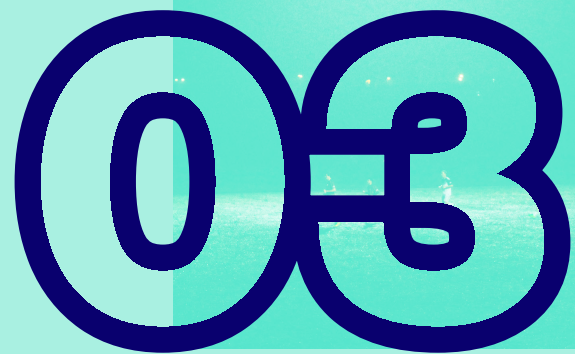
**Women's Champions League Finale**  
#3 Women's Sports Media Video By V30 Views In The Last 365 Days

## GROWTH OF WOMEN'S SPORTS VIEWERSHIP ON YOUTUBE (JUNE 2020 - MAY 2021)

Another way creators attract female audiences is by featuring more professional women's sports. Viewership of women's sports coverage on YouTube grew 3x faster than the average sports content in the last 6 months.



Source: Tubular Labs | Intelligence | Boolean Search Women Or Female Or Feminin Or Feminine | YouTube | Video Category: Sport | Videos Uploaded All Time | Views Measured From June 1st, 2020 - May 31st, 2021



# Online Experiences Like Esports Are Potential Competition

Esports have become an alternative to live sports games for many fans, especially during the pandemic when live sports were on pause. Some top creators already successfully embrace esports events and make them part of their content strategy.

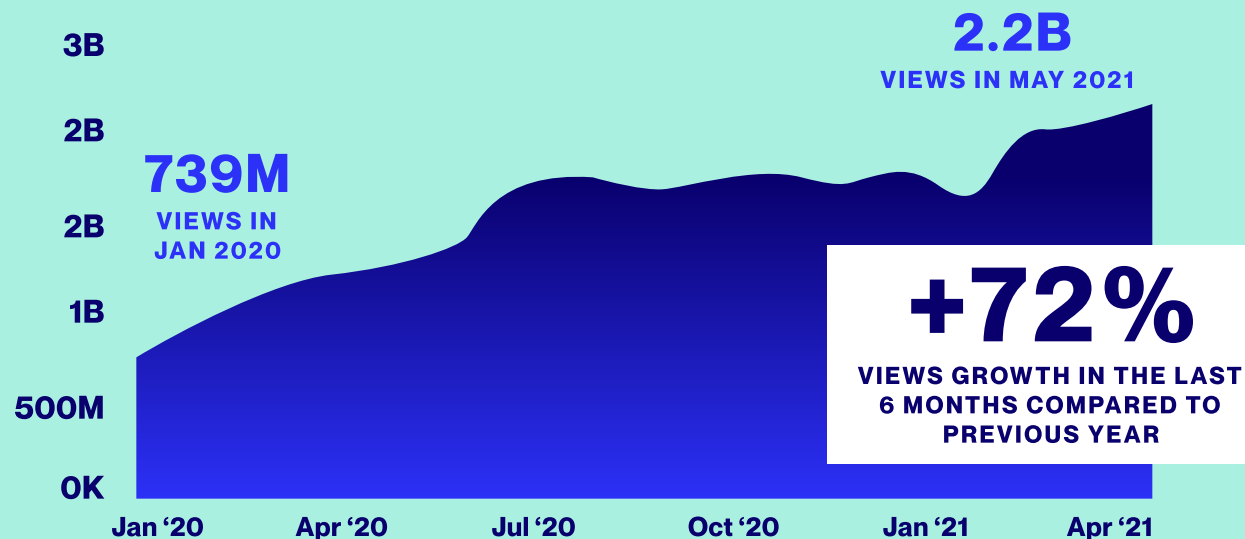


# Esports coverage on social video is growing rapidly and reaching younger audiences.

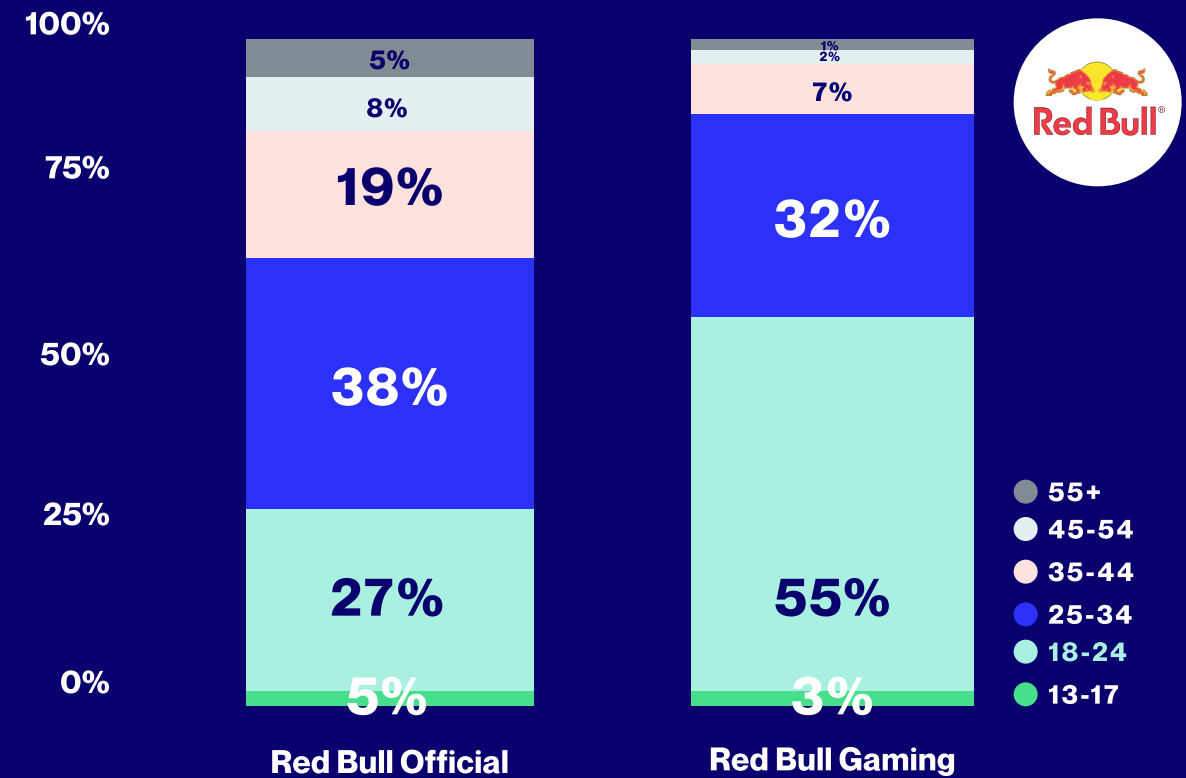
Some media companies and brands already successfully capitalize on this emerging trend by integrating esports content into their programming strategies to reach and retain younger audiences, with Red Bull being a great example of that.

Covering esports on its gaming channel enables Red Bull to reach younger audiences: 90% of Red Bull Gaming's global audience is between the ages of 13-34, while Red Bull's official channel skews slightly older with only 68% of viewers in that same age range.

## GROWTH OF ESPORTS VIEWERSHIP ON YOUTUBE (JAN 2020 - MAY 2021)



## RED BULL VS RED BULL GAMING GLOBAL CROSS-PLATFORM AUDIENCE COMPOSITION



Red Bull Gaming's coverage of esports on social video allows their brand to reach younger audiences across global markets.

Source: Tubular Labs | Audience Ratings | Audience Composition For Unique Viewers (Based On 30-Second Views) | Cross-Platform (YouTube+Facebook) | Vice & Red Bull Gaming | Global Audience P13+ | April 2021

Source: Tubular Labs | Intelligence | Boolean Search "ESports" Or #ESports | YouTube | Global Creators | Videos Uploaded All Time | Views From Jan 1st, 2020 - May 31st, 2021

# Key Takeaways

**01.**

## **HARNESS THE WATCHTIME GROWTH ON SOCIAL VIDEO FOR SPORTS CONTENT**

While some creator types like leagues & teams already benefit from this growth, sports media broadcasters and related brands have a big opportunity to claim their share of the market, too.

**02.**

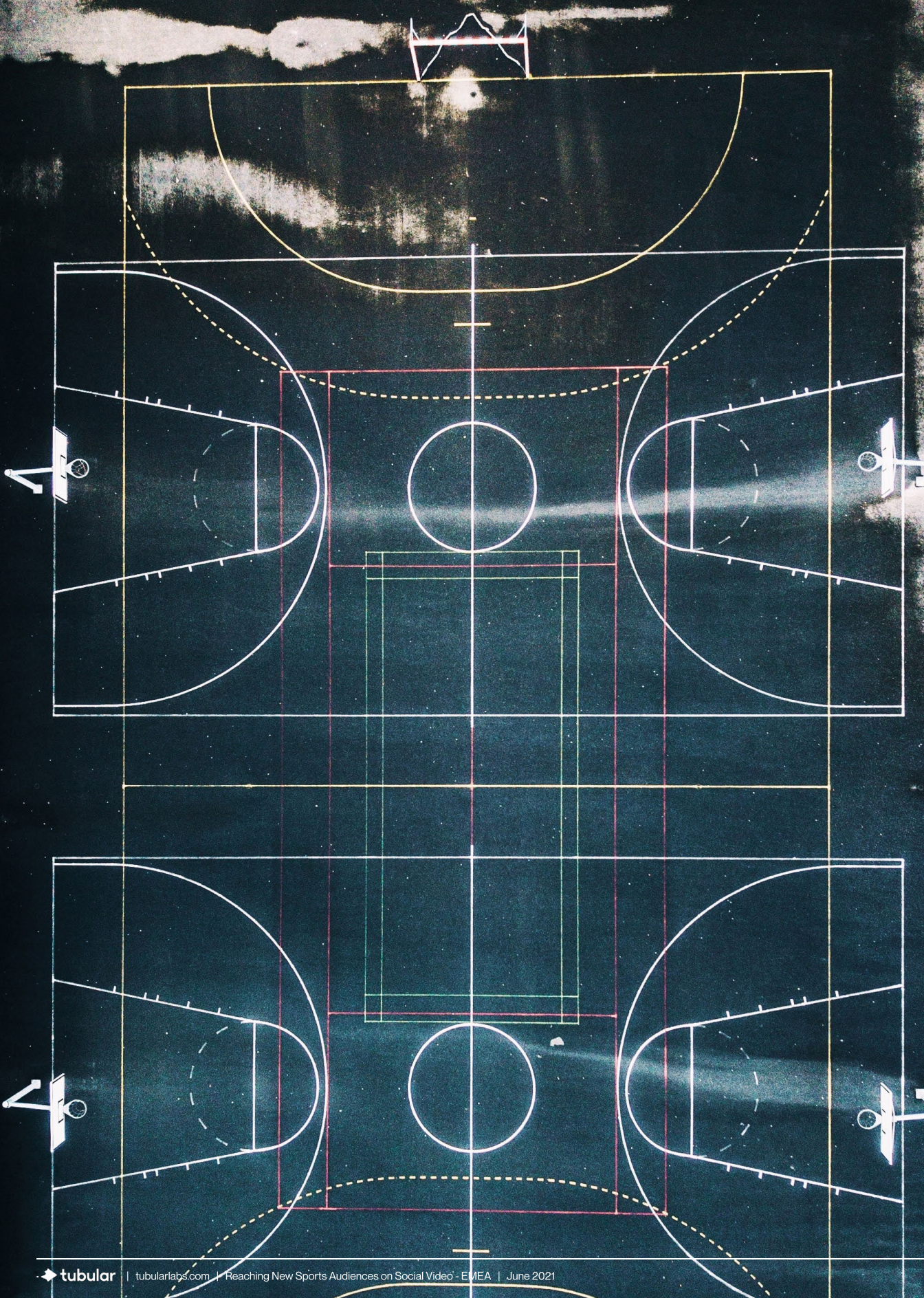
## **GO BEYOND YOUR CURRENT FAN BASE**

Finding younger and female audiences interested in sports and catering to their needs is key to growing beyond your current fan base.

**03.**

## **EMBRACE ONLINE SPORTS EXPERIENCES LIKE ESPORTS**

Digital experiences may seem like competition, but you can turn this potential threat into a boon by integrating popular genres like esports into your content strategy.





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