

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.

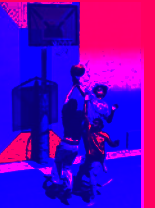
In this report, we look at how sports media creators are adapting their social video content to resonate with younger audiences and close the gender gap in sports.

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.

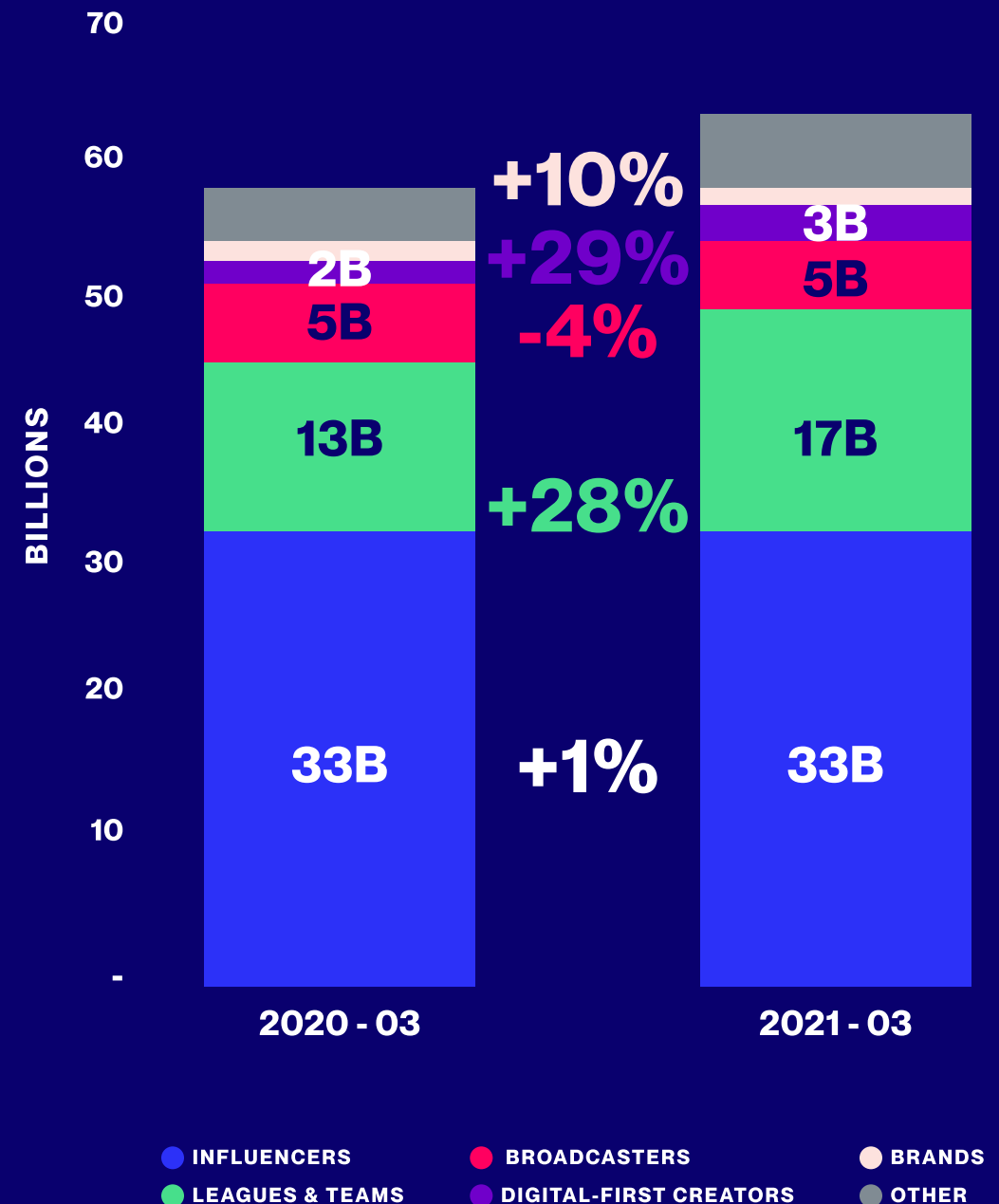


While sports overall saw watchtime growth on social video over the last year, not all creator types benefited equally.

Without live sports available, 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.

SPORTS - TOP 1000 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

Leagues & teams, as well as traditional broadcasters, reach the most US sports fans on social video, but digital-first creators are also entering the leaderboard — without holding the rights to sports games.



TOP US SPORTS MEDIA CREATORS BY US UNIQUE VIEWERS

RANK	TUBULAR CREATORS	APR UNIQUE VIEWERS
1	WWE	31.3M
2	ESPN	29.2M
3	SportsCenter	21.5M
4	WWE Network	19.1M
5	UFC	18.7M
6	PGA TOUR	14.8M
7	NBA	14.2M
8	MLB	14.1M
9	Barstool Sports	14.1M
10	Overtime	13.7M
11	GLORY Kickboxing	13.4M
12	House of Bounce	13.3M
13	UFC Fight Pass	12.7M
14	theScore	12.1M
15	Bleacher Report	11.6M

■ LEAGUES & TEAMS ■ BROADCASTERS ■ DIGITAL-FIRST

Source: Tubular Labs | Audience Ratings | Unique Viewers (Based On 30 Second Views) | Cross-Platform (YouTube+Facebook) | US Sports Media Creators Exc; Leagues & Teams | US Audience | April 2021



On

Younger Audiences' Viewing Preferences Are Changing

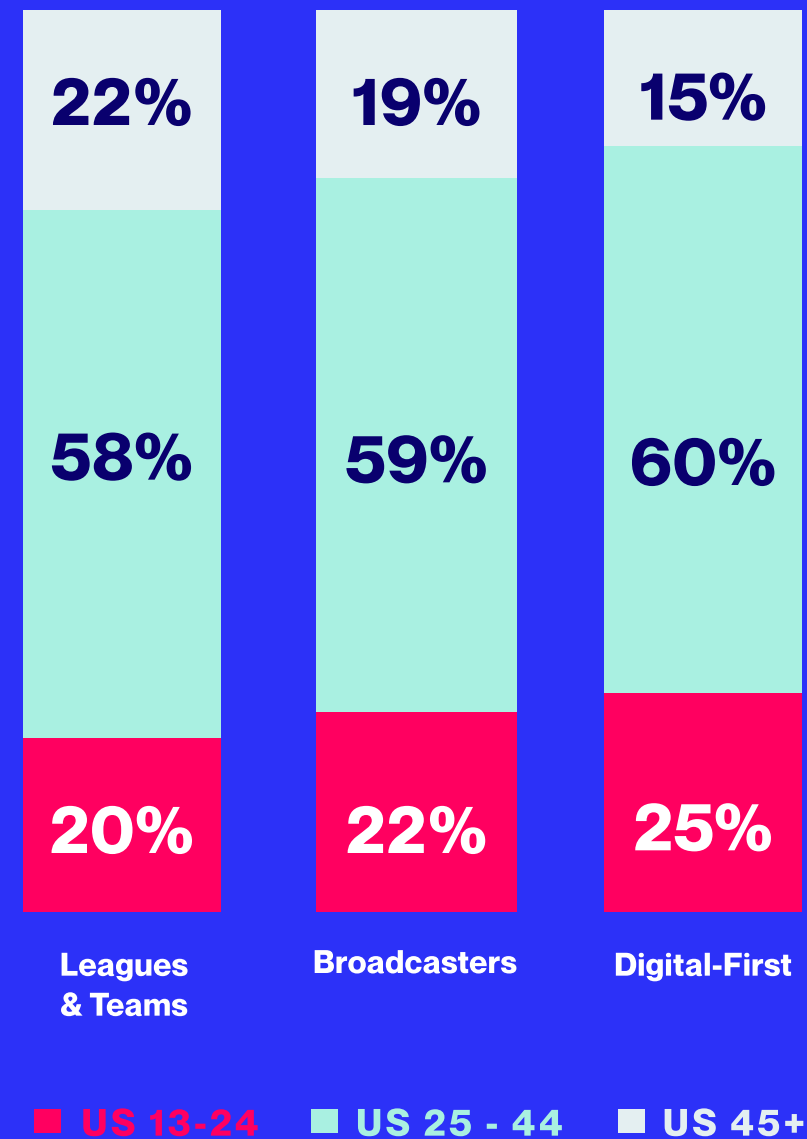


Digital-first sports media creators reach the largest share of younger US audiences, while the top leagues & teams cater to slightly older sports fans.

While leagues & teams, along with broadcasters, reach the most US sports fans on social video overall, digital-first creators manage to reach a higher share of younger audiences — 25% of their audiences are 13-24 year olds.

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 audiences through social video.

AUDIENCE COMPOSITION FOR THE TOP 10 US 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 US Leagues & Teams, Sports Broadcaster Channels, Sports Digital First Channels And Influencers | US Audience | April 2021

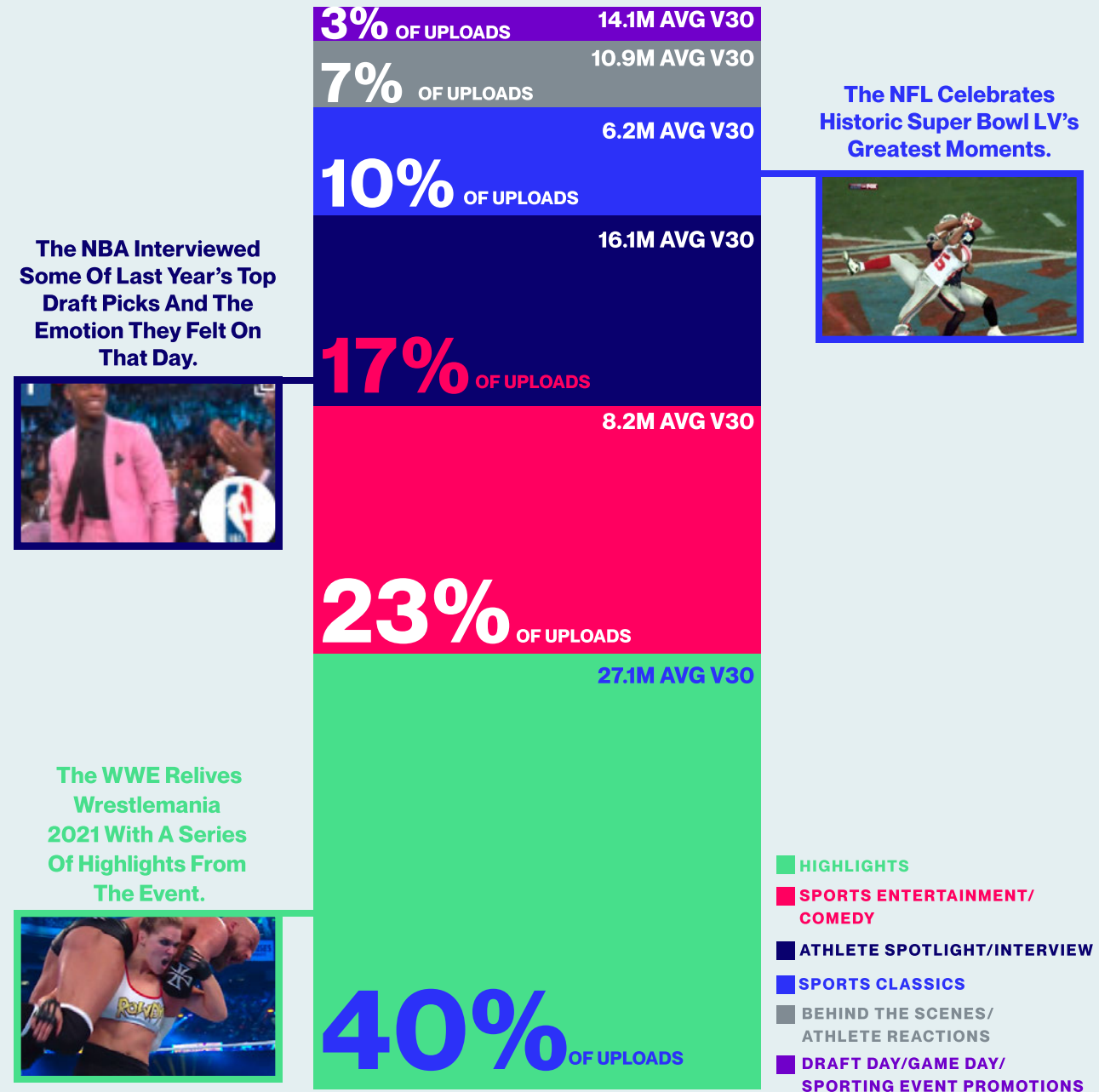
Leagues & teams leverage sports highlights from games/events, but also create nostalgic moments with sports classics that resonate with long-time sports fans.

Leagues & teams are catering to today's viewing habits where fans are less interested in watching the whole game and are often satisfied with game highlights. Leagues & teams are successful with this format, reaching an average of 27.1M views within the first 30 days after upload. They also bring back classic sports moments which long-time sports fans are excited to rewatch.

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 5 SPORTS LEAGUES & TEAMS



Source Tubular Labs | Intelligence | Facebook | Selected Top US Sports Broadcasters, Digital First, And Teams & Leagues | Based On Top 30 Videos By V30 Views | Videos Uploaded Last 365 Days | Data As Of June 3rd, 2021

Sports broadcasters show a high amount of non-game content, despite holding the rights to popular content that fans often demand.

While sports content like game highlights and interview content is in big demand from fans, the top US broadcasters uploaded a surprisingly high amount of non-game content like entertainment or non-professional sports.

However, athlete interviews and highlight videos showed the best performance per video (on average 36M views within the first 30 days after upload), suggesting this type of content is a key reason fans come to broadcasters' social video channels.

Content with athlete spotlights is clearly under-utilized, so it's a solid way for broadcasters to complement their TV offering and create a connection with fans they don't get on television, as well as to distinguish themselves from other sports creators who don't have access to this content.

TOP 5 SPORTS BROADCASTERS

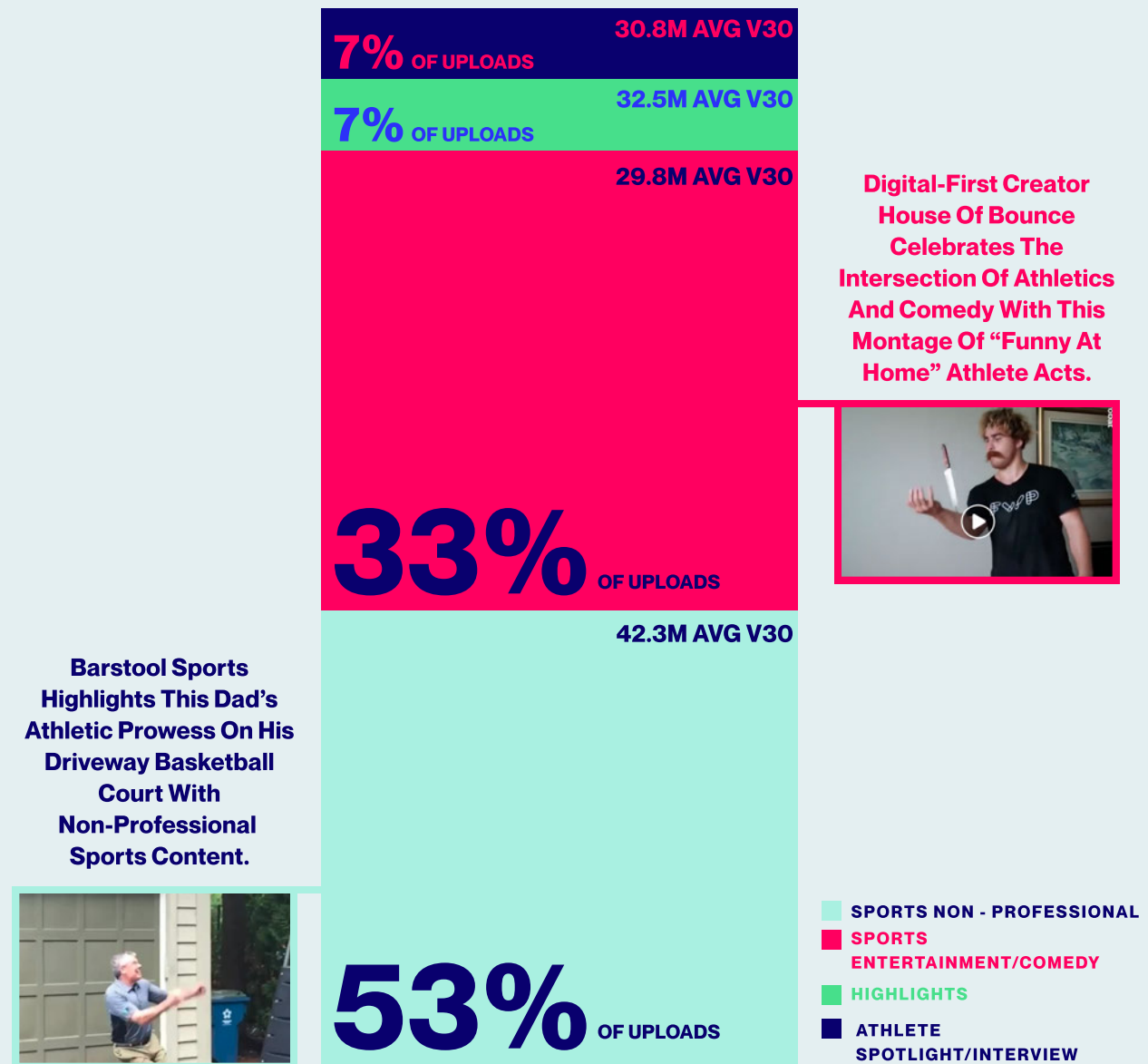



Source Tubular Labs | Intelligence | Facebook | Selected Top US Sports Broadcasters, Digital First, And Teams & Leagues | Based On Top 30 Videos By V30 Views | Videos Uploaded Last 365 Days | Data As Of June 3rd, 2021

Digital-firsts rely heavily on non-professional sports and entertainment content, and reach audiences beyond hardcore sports fans with that strategy.

Not holding the rights to major sporting events, digital-firsts are successful with non-professional sports content and entertainment - they show a high demand from fans with an average of 42.3M views within the first 30 days. Often going beyond sports-related topics, these creators are branching out to reach audiences beyond the hardcore sports fan.

TOP 5 DIGITAL-FIRST CREATORS





02

Female Fans Are Key for Audience Growth

Female audiences are into sports, but 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.



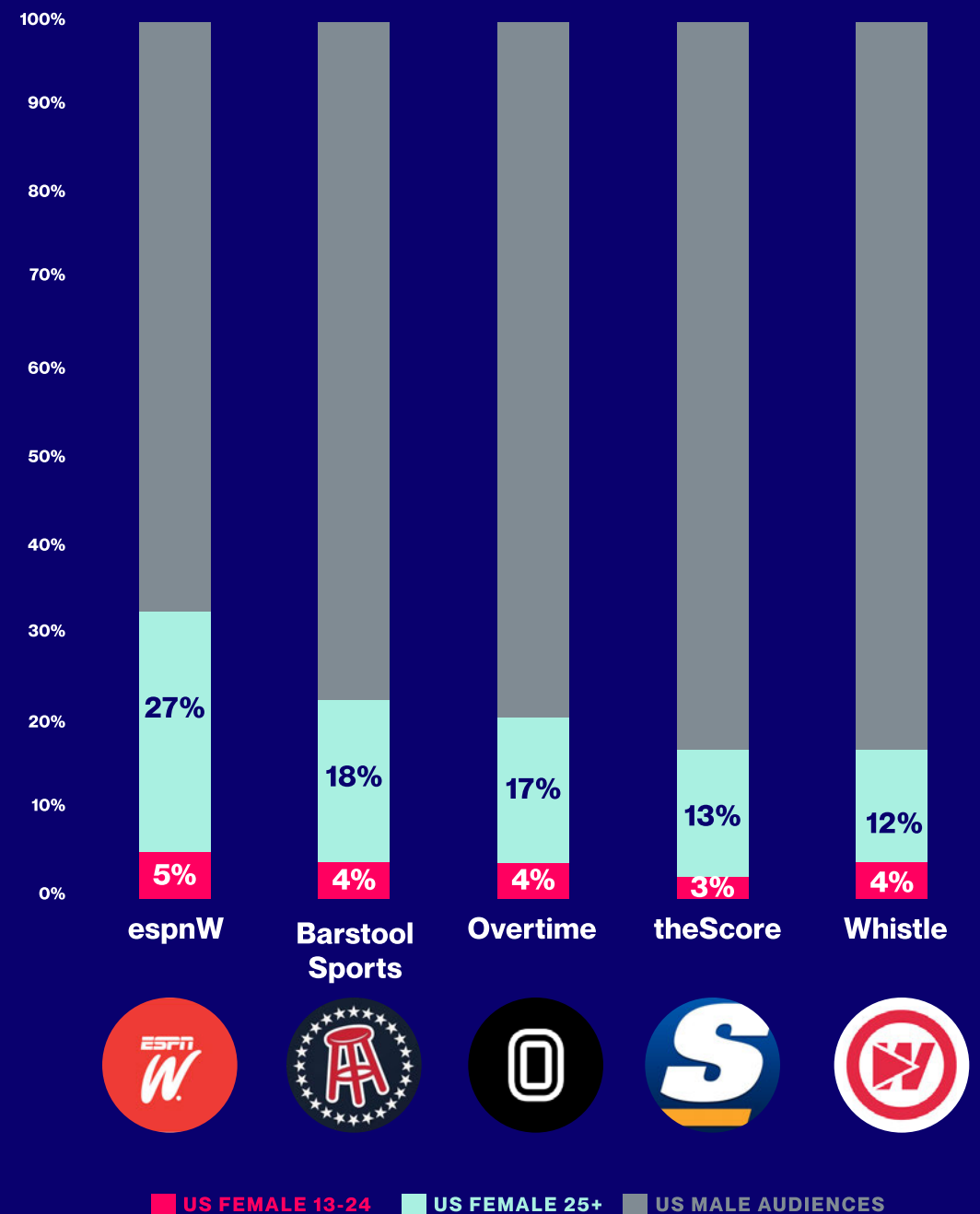
Channels entirely targeted towards females, as well as digital-first creators, are reaching a high female audience composition.

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

While a channel targeted specifically towards women works for ESPN, digital-firsts like Barstool Sports or Overtime also found the right tone and content to branch out to female viewers.

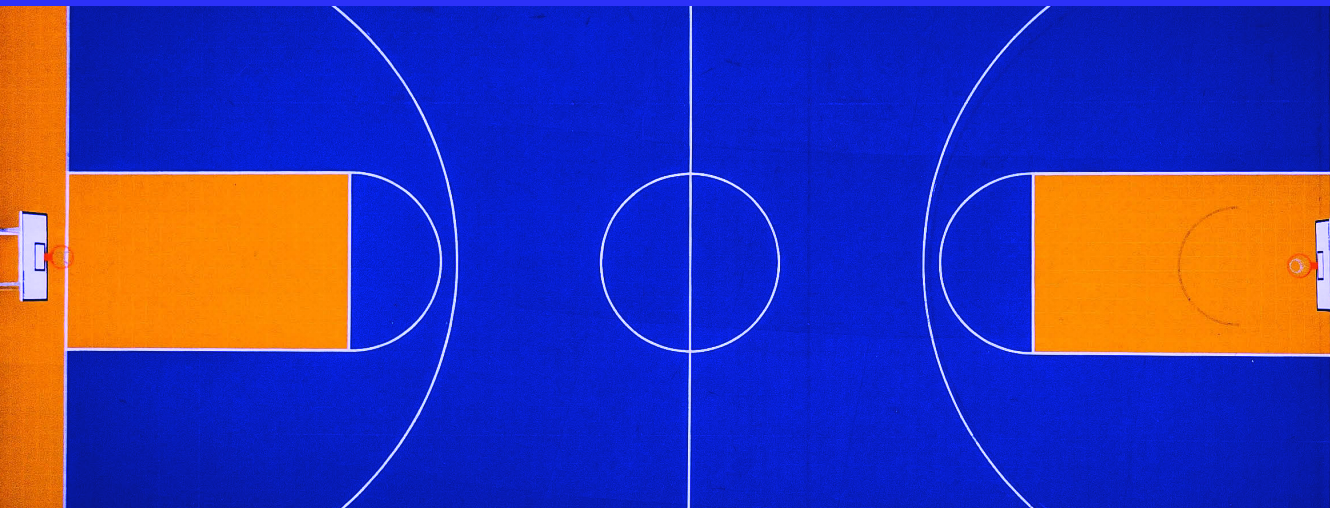
Let's look more closely at what these creators are offering female audiences.

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



Source: Tubular Labs | Audience Ratings | Audience Composition For Unique Viewers (Based On 30 Second Views) | Cross-Platform (YouTube+Facebook) | Sports Media Creators W/O Teams & Leagues, 1M Unique US Female Viewers Threshold | US Audience | April 2021

Formats like kids' sports videos and non-sports entertainment hit home with female audiences.



While sports like gymnastics work to reach a high share of female audiences, it's also about the formats and topics these companies are choosing. Kids' sports videos and non-sports entertainment were part of espnW and Barstool Sports' top content which resonated with female audiences.



espnW
32% Female Audience
1.1M Female US Viewers In April

Top videos include highlights from sports like gymnastics, sports teaching moments, or young girls' sports achievements.



FACEBOOK
 This landing is perfect
 Uploaded 13 Mar 2021
 29,904 Views
 ABOUT THE CREATOR
 espnW
 Apr Views 24.5M | V30 1.3M | 100% F.A. |
 Today Posts 100 @ 8AM

"This Landing Is Perfect"
 #1 espnW Video YTD
 (18M V30 Views)



FACEBOOK
 Backflip lessons
 Uploaded 08 Mar 2021
 15,914 Views
 ABOUT THE CREATOR
 espnW
 Apr Views 24.5M | V30 1.3M | 100% F.A. |
 Today Posts 100 @ 8AM

"Backflip Lessons"
 #2 espnW Video YTD
 (15.1M V30 Views)



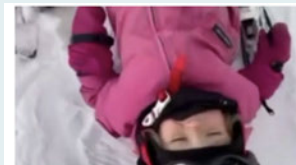
FACEBOOK
 She's incredible
 Uploaded 11 Mar 2021
 14,854 Views
 ABOUT THE CREATOR
 espnW
 Apr Views 24.5M | V30 1.3M | 100% F.A. |
 Today Posts 100 @ 8AM

"She's Incredible"
 #3 espnW Video YTD
 (12.6M V30 Views)



Barstool Sports
22% Female Audience
3.2M Female US Viewers In April

Sports home videos involving kids and entertaining non-sports content about women are among the top videos for Barstool Sports.



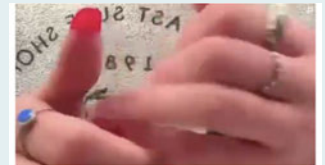
FACEBOOK
 This two-year-old SHREDS (via IC:Thotmountainlife)
 Uploaded 14 Mar 2021
 6,544 Views
 ABOUT THE CREATOR
 Barstool Sports
 Apr Views 14.0M | V30 20K | 100% F.A. |
 Today Posts 100 @ 8AM

"This Two-Year Old SHREDS"
 #5 Barstool Sports Video YTD
 (6.4M V30 Views)



FACEBOOK
 She is the manager now
 Uploaded 18 Mar 2021
 7,054 Views
 ABOUT THE CREATOR
 Barstool Sports
 Apr Views 14.0M | V30 20K | 100% F.A. |
 Today Posts 100 @ 8AM

"She's The Manager Now"
 #3 Barstool Sports Video YTD
 (7.8M V30 Views)

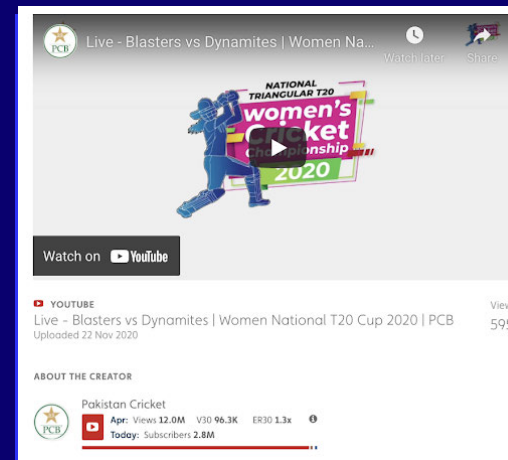


FACEBOOK
 This girl is 95% glowstick (via IC:serrodore)
 Uploaded 13 Mar 2021
 3,844 Views
 ABOUT THE CREATOR
 Barstool Sports
 Apr Views 14.0M | V30 20K | 100% F.A. |
 Today Posts 100 @ 8AM

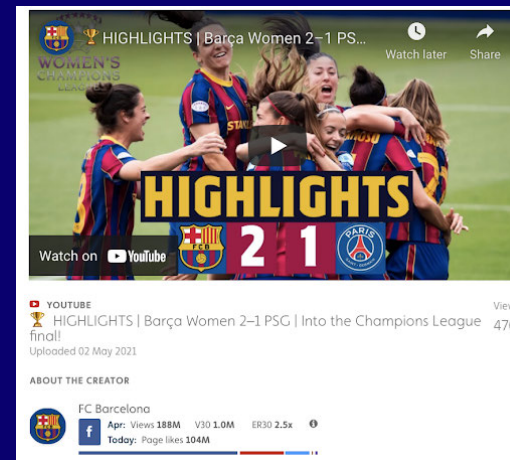
"This Girl Is 95% Glowstick"
 In Top 10 Barstool Sports
 Videos YTD
 (3.4M V30 Views)

Source: Tubular Labs | Audience Ratings | Audience Composition For Unique Viewers (Based On 30 Second Views) | Cross-Platform (YouTube+Facebook) | Sports Media Creators | US Audience | April 2021

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



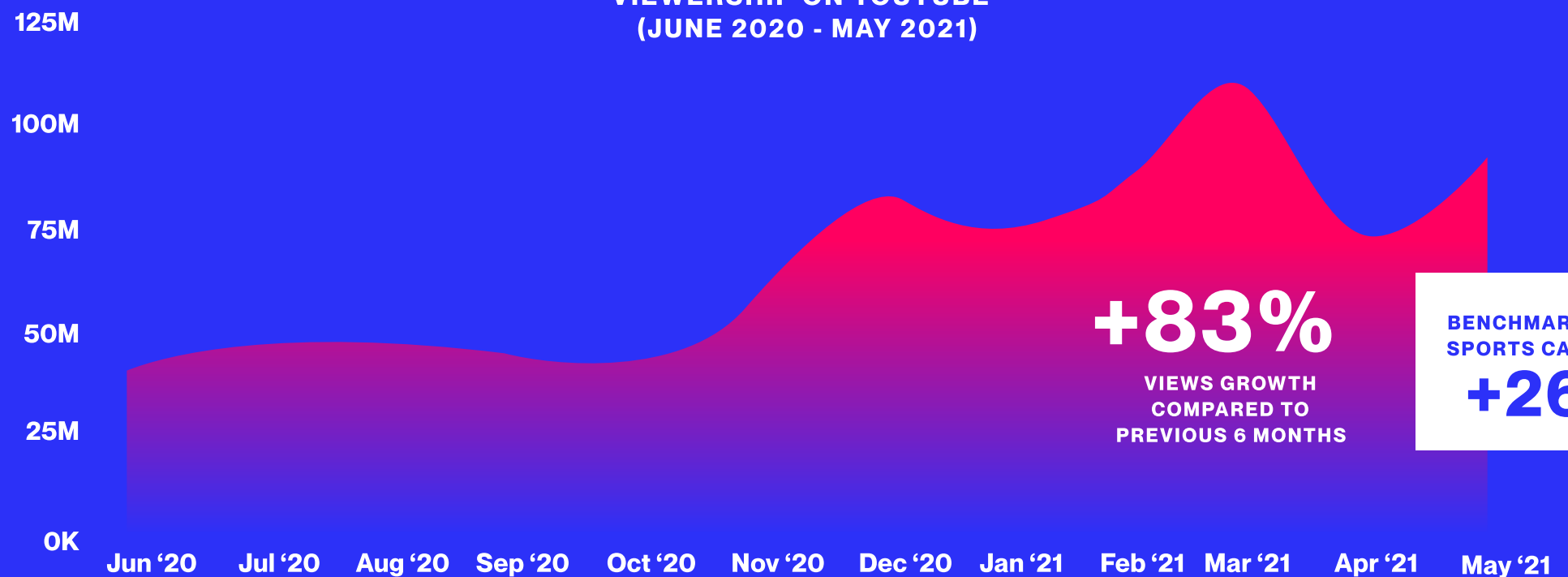
Women's Cricket
 #2 Women's Sports Media
 Video By V30 Views
 In The Last 365 Days



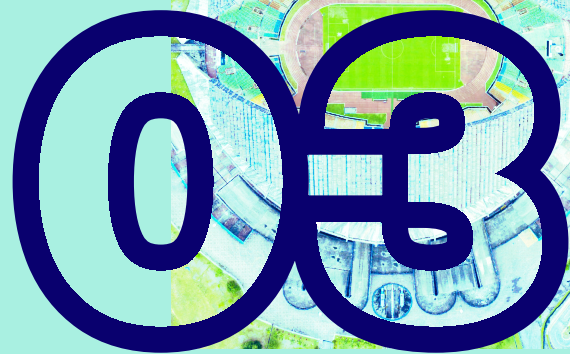
Women's Champions League Finale
 #3 Women's Sports Media
 Video By V30 Views In
 The Last 365 Days

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.

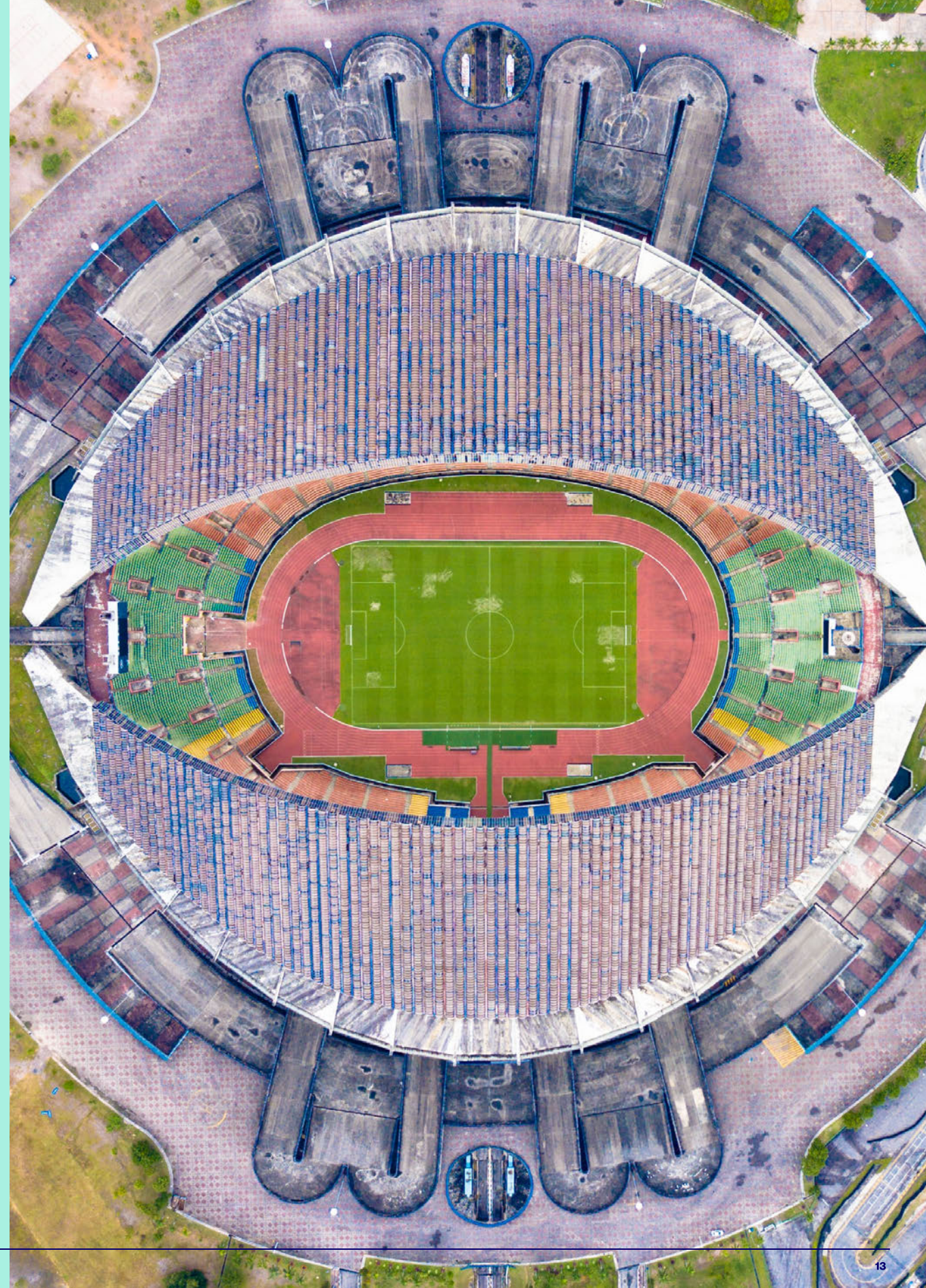


Source: Tubular Labs | Intelligence | Boolean Search Women Or Female Or Feminin Or Feminine | YouTube | Video Category: Sport | Videos Uploaded All Time | Views Measured From June 1st 2020 - May 31st 2021



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.

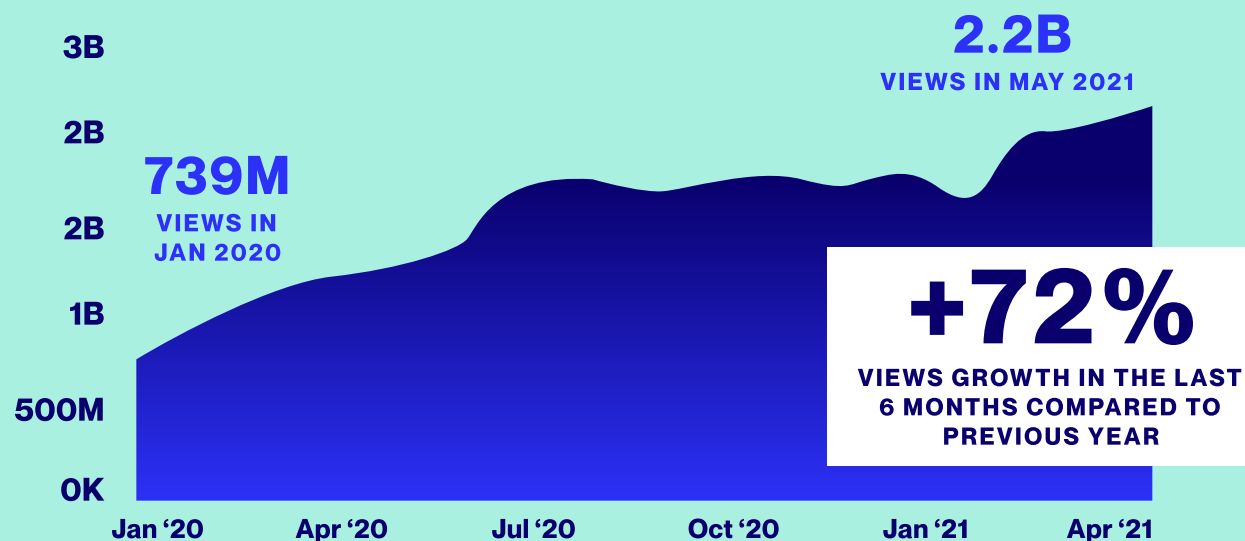


Esports coverage on social video is growing rapidly and reaching younger audiences.

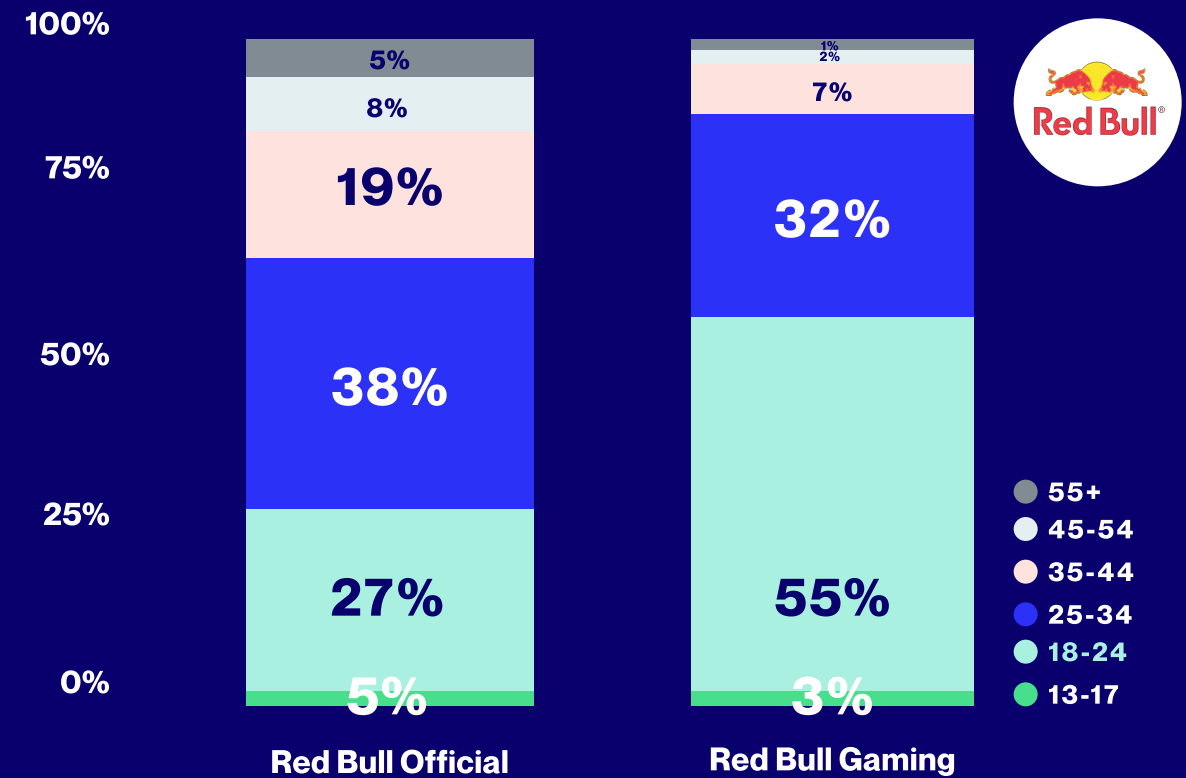
Some media companies and brands already successfully capitalize on this emerging trend by integrating esports content into their programming strategies to reach and retain younger audiences, with Red Bull being a great example of that.

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 1 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.

