

FALL SPORTS, GAME ON:

DRIVING BRAND ENGAGEMENT AND CO-VIEWING ON LINEAR TV WITH OUT-OF-HOME AUDIENCES

As the weather cools, one would imagine that people would opt to stay indoors, wrapped in blankets and sipping pumpkin-spiced lattes. But that's where the fun begins. Come September, some of America's most-watched sporting events hit the airwaves, and people drop what they're doing to watch fall sports on TV out of their homes.

From watching a young NFL quarterback becoming the first player to throw for over 3,000 yards in his first 10 games, to tuning into the Alabama Crimson Tide as they pursue their fifth NCAA football title in eight years, to witnessing King James taking his talents to Tinseltown, many exciting fall sports events drew viewers to the TV set this fall. And wait...let's not forget the Boston Red Sox winning the MLB World Series for the fourth time since breaking "The Curse of the Bambino." The fall season offers sports fans many reasons to grab their sweaters and head out the door to meet-up with friends and family to watch a game on the big screen.

Recently Nielsen fielded fall surveys (one for the general population and one for the Hispanic population) of out-of-home (OOH) sports viewing among adults 18-plus to MLB World Series, MLS, NBA, NCAA Football and NFL programming. The surveys examined the OOH viewing preferences of these fall sports fans and offer actionable insights into brand engagement, co-viewing, location viewing and the overall profiles of these viewers.



SOCIAL AND AWARE:

MILLENNIALS DO PAY ATTENTION TO ADS AND SHARE THEM

Linear TV advertising away from the home is effective among fall sports viewers, especially Millennials. Examining responses for each sport, at least 92% of all respondents, adults 18-plus, (general population, Hispanic English dominant, and Hispanic Spanish dominant or those who speak both languages equally) from both surveys said they paid attention to at least some of the advertising.

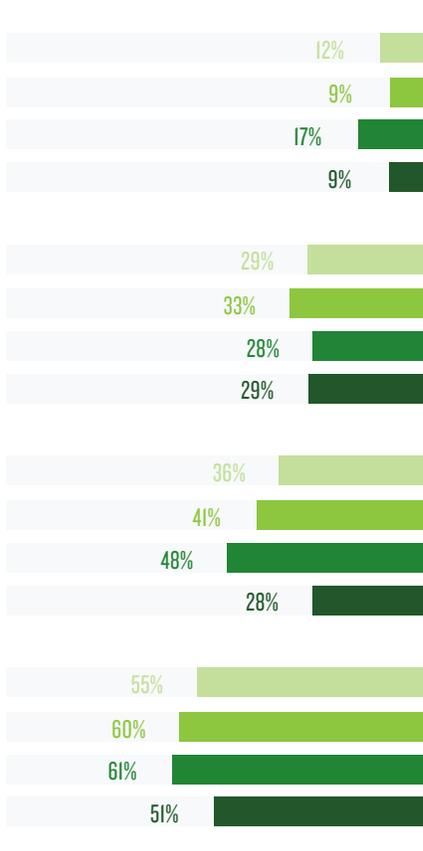
Furthermore, when viewing fall sports OOH, consumers do pay attention to specific brands and products they see on the TV glass. Across both surveys, we found that more than 75% of adults 18-plus said they were somewhat-to-very likely to notice the brand or product advertised. At 82%, Hispanics reported an even higher percentage than the general population (76%), stating that they were somewhat likely to very likely to notice an ad OOH during fall sport OOH viewing.

Interestingly, among younger adults age 18-24, OOH fall sports viewing on linear TV was also an effective way to connect with them. One-third of respondents aged 18-24 recognized a product, purchased and/or talked about a product as a result of the ad they viewed on linear TV OOH. Social engagement was highest across adults aged 25-34, with at least 17% of them sharing about the brand or product on social media after viewing the ad on TV, further emphasizing the social nature of Millennials' purchase behavior. Moreover, among both groups surveyed, roughly 60% of adults 25-34 talked about the advertised product or brand.

CAUSE AND EFFECT: OOH VIEWING LEADS TO DIRECT ACTION

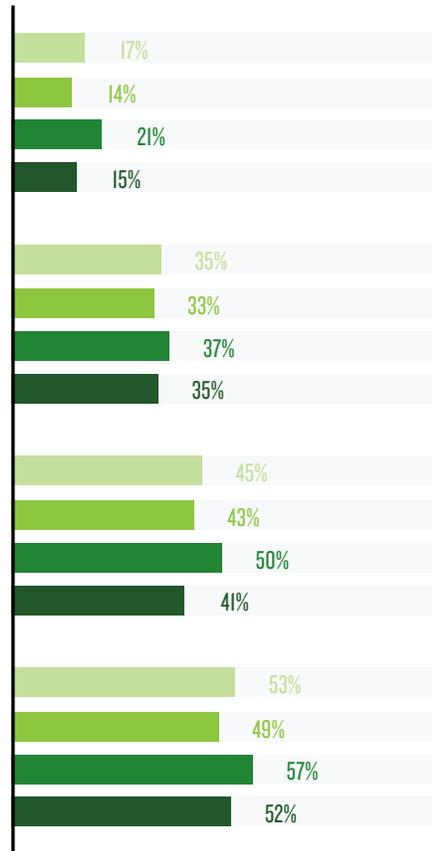
GENERAL POPULATION SURVEY ¹

Respondents can choose multiple



HISPANIC SURVEY ²

Respondents can choose multiple



18+
 18-24
 25-34
 35+

Sources: ¹Nielsen's Out-of-Home Fall Sports Location Survey, General Population 10/29-10/31, Base: Respondents who are likely to notice advertised brands while watching OOH. ²Nielsen's Out-of-Home fall Sports Location Survey, Hispanic 11/19-11/27, Base: Respondents who are likely to notice advertised brands while watching OOH.

IT'S PARTY TIME:

TUNING IN WITH FRIENDS AND FAMILY IN LARGE GROUPS

Being around friends and family is always cause for a celebration and watching sports together always makes the experience even more fun. Both surveys found that adults 18-plus like to spend more time watching fall sports with others and in groups of different sizes. According to the results from the general population survey, 31% of adults watched with two people, 23% viewed with three people and 54% tuned in with more than four people¹ when viewing sports OOH. Males were more likely than females to view fall sports OOH with groups of more than 10 people (15% males vs. 11% females).

Comparing the numbers above to the Hispanic survey, fewer reported to have watched with two people (24%), about the same reported to view with three people (24%) and more Hispanics tuned with more than four people (58%)² when viewing fall sports OOH. These same percentages applied to both Spanish Dominant and those viewers that speak both English and Spanish equally at home and English Dominant speakers. However, among Hispanics regardless if they are Spanish Dominant, speak both languages equally at home or are English Dominant, both male and female viewers like to watch fall sports OOH with groups of more than 10 people (13% Hispanic males and 12% females, respectively).

A deeper look at the results also uncovered that those who viewed fall sports with others stated they were most likely to do so with friends (roughly 70%) and family (roughly 60%) across both surveys. A smaller percentage said they viewed with coworkers or colleagues: 15% for the general population and 24% for Hispanic surveys. Among Hispanics, Spanish dominant and/or those that speak both languages equally at home, reported viewing more with friends (75%) while English dominant speakers reported viewing more with family (63%).

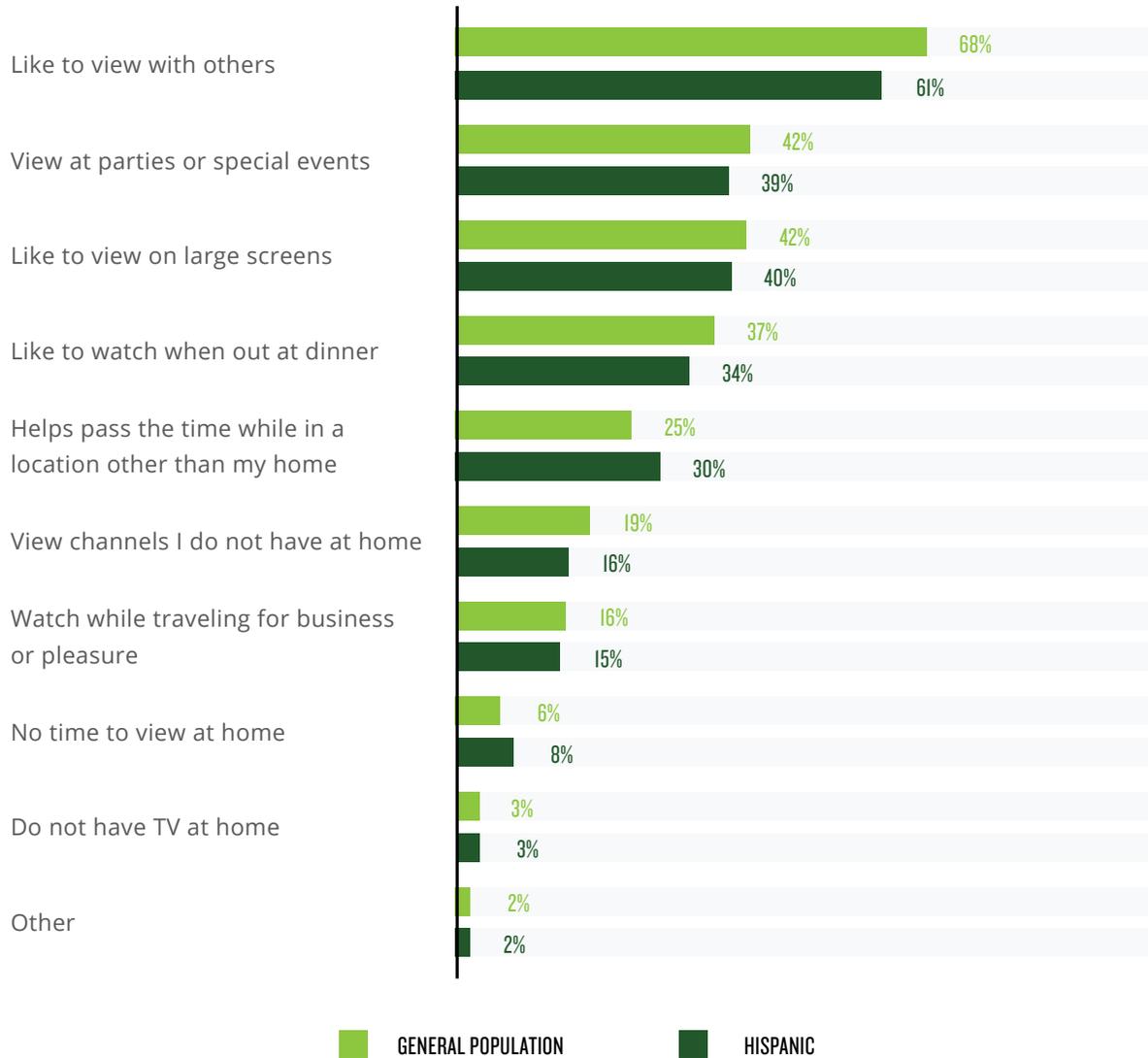
In fact, enjoying watching with others or at parties/special events were among the main reasons viewers 18-plus left the comfort of their own couch to watch fall sports. These insights are especially valuable, as they assert that a significant portion of OOH viewing is inherently social and effective across consumer groups and create a “viewing party” like phenomenon.

¹ General population survey participants were able to select responses for each viewing event, leading to a distribution over 100%

² Hispanic survey participants were able to select responses for each viewing event, leading to a distribution over 100%

REASON FOR VIEWING FALL SPORTS OOH, ADULTS 18+

Respondents can choose multiple



Source: Nielsen's Out-of-Home Fall Sports Location Survey, General Population, 10/29-10/31 and Hispanic, 11/19-11/27, Base: Watch regularly OOH

MILLENNIALS AND GEN X-ERS WATCHED THE MOST FALL SPORTS OOH ACROSS MOST LOCATIONS

There is an abundance of locations to view OOH sports (just think about the last time you and your friends couldn't agree on a locale for your soiree). Restaurants/bars and someone else's home in particular are hotbeds of social engagement with sports, with more than half of adults 18-plus viewing in these locations.

Differences in other OOH viewing locations are clear when looking by demographic age break in the general population survey. For example, adults 18-24, those healthy multitaskers, view more in gyms/fitness centers than adults 25-plus. On the other hand, adults 25-34 may be traveling more, as they report more viewing while in transit (i.e. taxi), in a hotel room and in an airport than their younger and older counterparts.

Even more interestingly, Hispanics are heavy viewers of OOH content across more locations. Among 18-plus respondents, the survey found that they viewed in a restaurant/bar or at someone else's home as much as general population respondents. On the other hand, when it came to viewing in other places, such as the gym, work, and in transit, Hispanics watched more OOH content compared to the general population. In a similar vein, Hispanics 35-plus had the highest percentage of viewing in hotel rooms and airports, indicating that this group still consumes content on-the-go despite leading busy lives.

WHERE DID RESPONDENTS VIEW FALL SPORTS OOH?

Respondents can select multiple locations

Adult	General Population Survey 18+	18-24	25-34	35+	Hispanic Survey 18+	18-24	25-34	35+
In a restaurant or a bar	66%	70%	71%	63%	66%	67%	65%	65%
In someone else's home	53%	51%	57%	51%	53%	51%	54%	53%
At a gym or a fitness center	18%	31%	24%	13%	27%	29%	30%	21%
At work	14%	20%	19%	11%	24%	25%	25%	23%
In transit or on the go (i.e. Taxi)	10%	13%	18%	6%	14%	14%	15%	12%
In a hotel room	10%	11%	14%	8%	14%	10%	13%	18%
In an airport	4%	2%	6%	4%	8%	8%	7%	10%

Source: Nielsen's Out-of-Home Fall Sports Location Survey, General Population, 10/29-10/31 and Hispanic, 11/19-11/27, Base: All respondents 18+

While the chart above looks at the percentage viewing in each location, the data can also be analyzed by looking at the percent viewing OOH fall sports in only one location. For example, while both surveys showed that while 66% of adults 18-plus are watching in a restaurant or bar, only 20%-30% (27% for general population and 21% of Hispanics) are exclusively watching in a restaurant and bar.

WHO ARE THE FALL SPORTS OOH VIEWERS?

While no two ‘players’ are the same, there are some key insights on the overall makeup of the fall sports OOH viewer. While it’s known that OOH is popular with younger audiences, older Millennials and Gen Xers are also attracted to viewing fall sports away from the home. Among the general population survey, the average age of respondents was 42, the respondents had an average household income of \$68,000 and half said they have a college or graduate degree. In contrast, the Hispanic results show that viewers were significantly younger, with an average age of 31, but had a lower average household income \$58,000, and 38% said they have a college or graduate degree. Among Hispanics, English dominant reported a higher income than Spanish dominant or those that speak both languages equally at home (\$65,000 vs. \$52,000), with 38% having a college or graduate degree across both languages.

Additionally, the results offered compelling insights into the gender breakdown of the fall sports OOH viewer. General population viewership skewed 55% male and 45% female, while Hispanic viewership skewed more female at 52%, and 48% male. Viewership among Spanish dominant or those that speak both languages equally at home, and English dominant, also skewed more female. Nevertheless, in the general population survey, females leaned 7% higher than in our [Summer Sports](#) survey, further showcasing the importance of OOH for accessing harder-to-reach demographics.



Survey	Average Age	Average Income	% with College or Graduate Degree
General Population	42	\$68,000	50%
Hispanic	31	\$58,000	38%

Footnote: The average age, income and education level is derived from those that participated in the survey.

Source: Nielsen’s Out-of-Home Fall Sports Location Survey, General Population, 10/29-10/31 and Hispanic, 11/19-11/27, Education based on College Graduate or Graduate Degree only
 Base: All respondents 18+

Come the fall season, consumers have a plethora of viewing options. Yet, when it comes to viewing content outside of the home, sports is in a league of its own. The general population and Hispanic surveys showcase the strength of fall sports to draw viewers away from home to watch their favorite team and bond with their family and friends. Fall sports provides a great opportunity for co-viewing. It also offers brands a new opportunity to interact with consumers, as the study found that OOH viewing drives engagement. And while restaurants/bars and other people's homes are the most common places where OOH linear TV sports viewing is taking place, there are other locations that also draw high tuning, including the gym, the workplace, airport and hotels.

These insights support what media companies have said about OOH viewing on linear TV—it brings in additional viewers from diverse locations and drives brand conversation. For marketers and brands the biggest takeaway is that OOH viewing of fall sports delivers new audiences who like to watch with large socially active groups, who are open to a brand's message and are willing to take action.

NIELSEN'S OUT-OF-HOME FALL SPORTS LOCATION SURVEY

Nielsen conducted an online survey to provide an independent measure of out-of-home linear TV viewing by location for fall sports events. Viewing sports outside of the home has seen significant increases in audience among television genres, this study was conducted to understand the profile, composition and makeup of these OOH viewers.

ONLINE SURVEY METHODOLOGY

The online survey collected only out-of-home linear TV viewing from the previous week. This report showcases data among adults 18-plus who viewed measured sports events OOH in locations including: offices, gyms, restaurants/bars, airports, someone else's home, and hotels. Survey respondents must have watched live TV as it aired, watched on a TV screen outside of the home and have been able to hear at least some of the audio. The survey results do not include samples that are representative of the total United States, but rather only those who watched the specific sport, outside of their home, on TV and in a location where they could hear the audio.

Viewing to other than the specified programs, all in-home viewing, viewing other than on a TV screen, pre-recorded programming and video on demand programming was not measured.

ABOUT THE GENERAL POPULATION OUT-OF-HOME FALL SPORTS LOCATION SURVEY, OCT 29-31, 2018

The fall sports survey was fielded to a national sample from October 29-October 31, 2018. A minimum of 300 individuals were surveyed for each of the following sports: MLB World Series, NBA Basketball, NCAA Football, and NFL Football (total of 767 respondents).

ABOUT THE HISPANIC OUT-OF-HOME FALL SPORTS LOCATION SURVEY, NOV 19-27, 2018

The fall sports survey was fielded to a Hispanic sample from November 19-November 27, 2018. A minimum of 300 individuals were surveyed for each of the following sports: NCAA Football, NBA Basketball, Professional Soccer and NFL Football (total of 880 respondents). Respondents of the Hispanic survey were given the choice to complete the survey in English or Hispanic. The survey was fielded and available in both languages. The language spoken in the home of the respondents of this survey were as follows: 19% Spanish Dominant, 31% Spanish and English equally, and 49% English Dominant.

ABOUT NIELSEN

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