



# What fans want:

## **The 2022 world football report**

*How brands, broadcasters and platforms can capitalize on the FIFA World Cup 2022™ and its billion-plus views*





# Introduction

The FIFA World Cup 2022™ is a football fan's paradise. Over 28 days of play, they'll watch 32 national football teams compete in 64 matches, culminating in a final game that hundreds of millions of people will watch.

For an event as momentous and emotionally charged as the World Cup, many fans will even reconfigure their sleep patterns so that they can watch the games in real-time. Even with the rise of streaming and on-demand content, live TV is viewers' preference.<sup>1</sup>

The experience extends far beyond the matches—spilling out into the streets and taking over fans' screens and feeds. But with so much happening, the competition for eyeballs is almost as intense as the battle for possession on the field.

The entire media ecosystem—from the broadcasters, streamers and platforms to the brands and rights holders—needs a precise understanding of who's watching, how they're watching and what they care about across all regions and demographics.

This report delivers that, helping media players create the ultimate World Cup experience and helping marketers capitalize on the extraordinary content and sponsorship opportunities.

<sup>1</sup> Nielsen Fan Insights, February 2022, 13 markets: Australia, Brazil (urban population), China (urban), France, Germany, India (urban), Italy, Japan, Russia (urban), South Korea (urban), Spain, U.K., U.S.





# From Spain to South Korea: The world's most popular sport

Football remains the world's most popular sport, generating powerful interest in 40% of the global population.<sup>2</sup> It was one of the three most popular sports in 10 of the 13 countries<sup>3</sup> we analyzed, which include the world's top 10 economies.<sup>4</sup> And of the countries where football did not rank in the top three—Canada, Australia and the U.S.—it did rank in the top 10.

## Data moment

### Football is one of the three most popular sports in 10 of 13 countries surveyed

#### Top 3 sports in each country | Interested population

<b>Australia</b>	Australian rules football - 36%	Tennis - 34%	Cricket - 32%
<b>Brazil</b>	<b>Football - 65%</b>	Volleyball - 50%	Extreme sports - 42%
<b>Canada</b>	Ice Hockey - 43%	Figure skating - 31%	Snowboarding - 29%
<b>China</b>	Basketball - 44%	Badminton - 41%	<b>Football - 40%</b>
<b>France</b>	<b>Football - 43%</b>	Tennis - 34%	Rugby - 33%
<b>Germany</b>	<b>Football - 51%</b>	Ski jumping - 40%	Biathlon - 37%
<b>India</b>	Cricket - 73%	<b>Football - 56%</b>	Badminton - 55%
<b>Italy</b>	<b>Football - 57%</b>	Motorsports (+F1) - 43%	Athletics (e.g. Track & Field) - 42%
<b>Japan</b>	Figure skating - 35%	Baseball - 35%	<b>Football - 28%</b>
<b>South Korea</b>	Short track speed skating - 51%	<b>Football - 50%</b>	Figure skating - 47%
<b>Spain</b>	<b>Football - 57%</b>	Tennis - 44%	Basketball - 43%
<b>U.K.</b>	<b>Football - 52%</b>	Boxing - 31%	Motorsports (+F1) - 30%
<b>U.S.</b>	American football - 51%	Basketball - 40%	Baseball - 39%

<sup>2</sup> Nielsen Fan Insights, February 2022, 13 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.

<sup>3</sup> Nielsen Fan Insights, February 2022

<sup>4</sup> International Monetary Fund, World Economic Outlook 2022

Data source: Nielsen Fan Insights, January-April 2022

Football audiences cross demographic lines, including income, education and profession. Fans are of all ages, although they're more likely to be under 50 and over-index on income versus the average person. And while, overall, more men watch football than women, women's interest in the World Cup dwarfs all other major international football competitions. The UEFA European Championship ranks second in popularity, but female interest in that drops by 13 percentage points when compared to the World Cup.<sup>5</sup>

Currently, 37%<sup>6</sup> of global football fans are women. Given their keen interest in the World Cup, it could be the right moment to prioritize speaking directly to this cohort and turn potentially casual fans into loyal ones through more thoughtful content and sponsorship integrations that surround the matches.

For instance, this year is the first time the World Cup will overlap with the festive holiday season for much of the world, and women are often key holiday season spenders. So, there's a natural bridge for brands, broadcasters and platforms to deliver holiday-related messages, content, services and merchandise directly to this audience while capitalizing on the halo of World Cup excitement.

<sup>5</sup> Nielsen Fan Insights, January-April 2022 12 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, South Korea (urban population), Spain, U.K., U.S. UEFA European Championship - Australia, Brazil, France, Germany, India, Italy, Spain, U.K.; AFC Champions League - Australia, China, India, Japan, South Korea; AFC Asian Cup - Australia, China, India, Japan, South Korea; MLS - Brazil, China, France, Italy, U.S.; J. League - Australia, China, Japan, South Korea

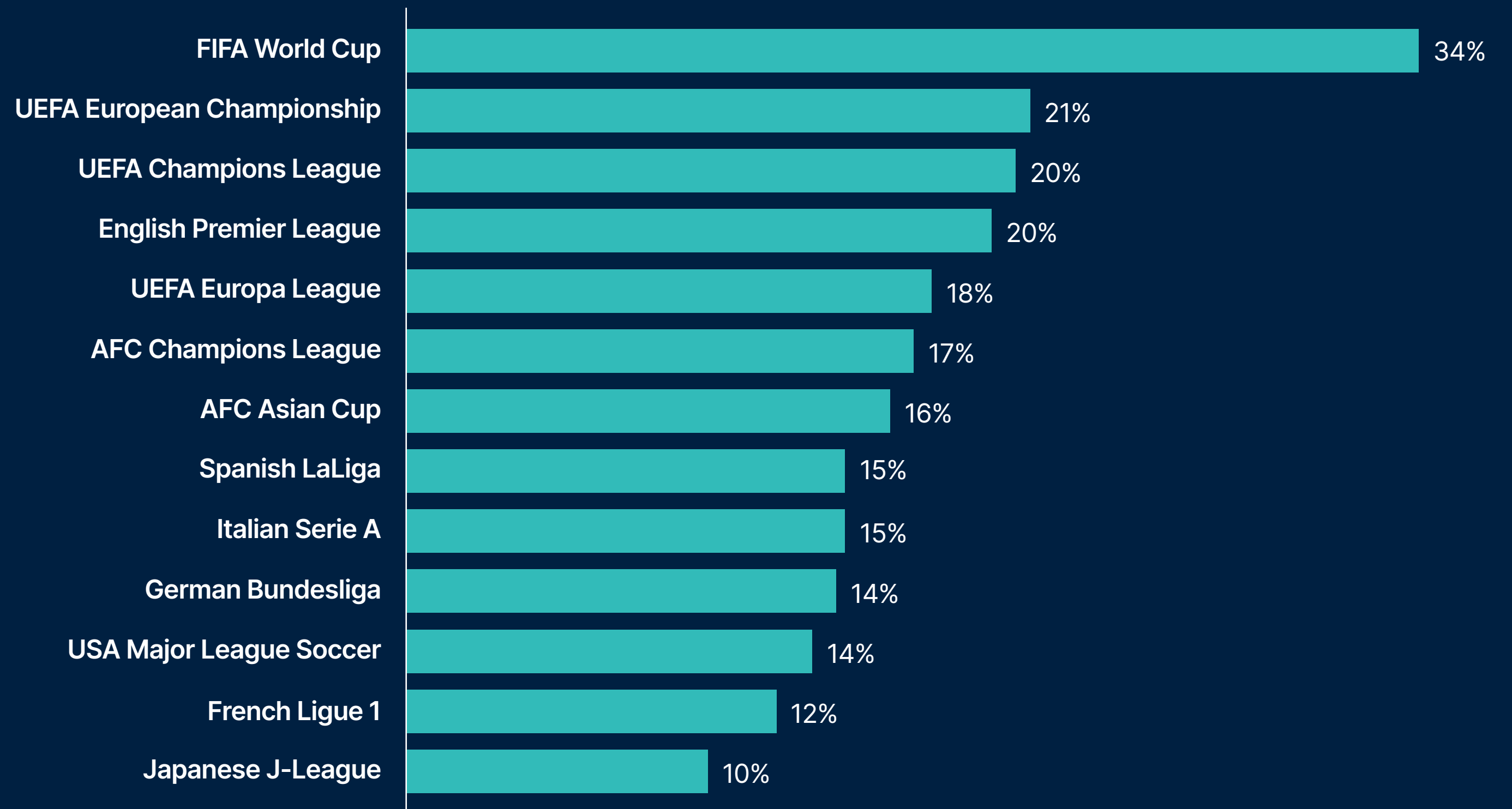
<sup>6</sup> Nielsen Fan Insights, February 2022, 13 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.

Data source for chart: Nielsen Fan Insights, January-April 2022, 12 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, South Korea (urban population), Spain, U.K., U.S. UEFA European Championship - Australia, Brazil, France, Germany, India, Italy, Spain, U.K.; AFC Champions League - Australia, China, India, Japan, South Korea; AFC Asian Cup - Australia, China, India, Japan, South Korea; MLS - Brazil, China, France, Italy, U.S.; J. League - Australia, China, Japan, South Korea

**Data moment**

## Women are more interested in the World Cup than any other major football competition

Percent of women interested in various football competitions



% displayed are rounded



Given the sport's growing appeal, rights holders and content providers are increasing access to it, amplifying the World Cup buzz.

For football fans who watch sports, free-to-air TV<sup>7</sup> is the most popular option, while 62% pay to watch<sup>8</sup>, 72%<sup>9</sup> tune in via social media and 68%<sup>10</sup> view on over-the-top (OTT) streaming devices. This means brands, publishers and platforms can get creative with how they engage audiences across multiple devices.

For example, in May of 2022, **TikTok announced** it would be the official partner of the UEFA Women's EURO 2022. The partnership lets TikTok users access exclusive behind-the-scenes footage from the tournament, amplify their own video content with dynamic effects, and reinforces the platform as a go-to space for all things football fandom.

## Football fans who watch sports:

Free-to-air TV<sup>7</sup>

81% 

Pay to watch<sup>8</sup>

62% 

Social media<sup>9</sup>

72% 

Over-the-top (OTT) streaming devices<sup>10</sup>

68% 

<sup>7,8,9</sup> Nielsen Fan Insights, February 2022, 13 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.

<sup>10</sup> Nielsen Fan Insights, February 2022, 12 markets: Australia, Brazil (urban population), France, Germany, India (urban population), Italy, Japan, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.



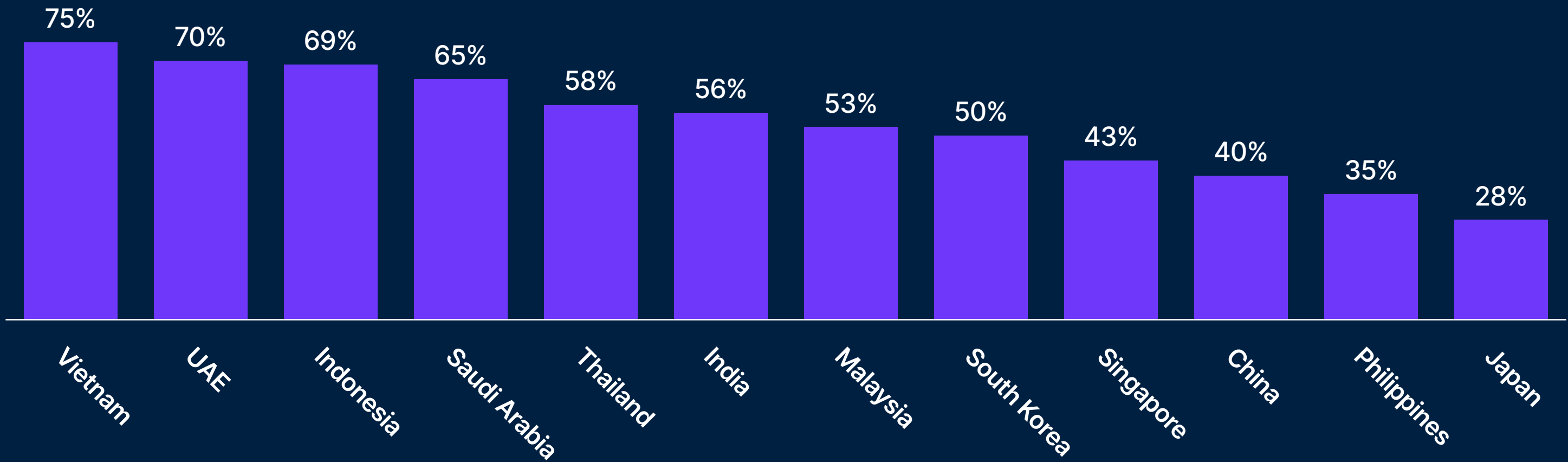
Looking to the major markets in Asia, at least 50% of people in both India and South Korea are interested in football. This level of interest is matched only in Brazil, Germany, Italy, Spain and the U.K. among the nations we survey monthly.<sup>11</sup>

This tells only part of the story in Asia, however. The level of interest in football in Southeast Asia is massive despite the fact that none of the countries in this region have traditionally qualified for the World Cup finals. In three of the four most populated Southeast Asian countries—Indonesia, Vietnam and Thailand—well over 50% of the population in each is interested in football. The sport is also popular with over 50% of the population of the sixth most populated Southeast Asian nation, Malaysia.

Globally, the World Cup has the highest awareness of any sporting event—95%<sup>12</sup> of sports fans, on par with the summer and winter Olympics. Perhaps unsurprisingly then, half of sports fans are willing to pay for live/on-demand coverage of the World Cup, more than any other sports broadcast.<sup>13</sup>

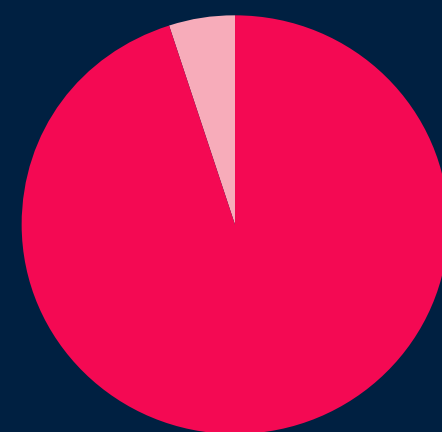
**Data moment**

**Percent of people interested in football - Asian countries surveyed**

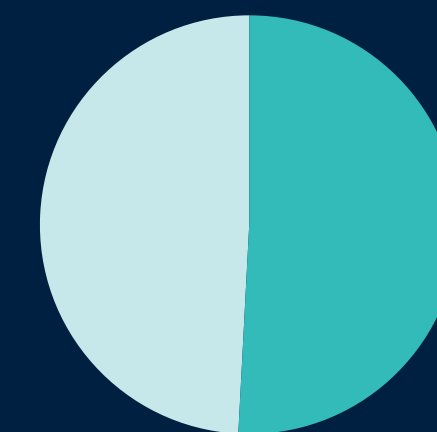


Source: Nielsen Fan Insights, Jan - Apr 2022: China, India, Japan, South Korea; Feb 2022: Indonesia, Thailand, United Arab Emirates; May 2021: Malaysia, Philippines, Saudi Arabia, Singapore; Nov 2021: Vietnam

**The World Cup has the highest awareness of any sporting event**



**95%**  
of sports fans are aware of the World Cup<sup>12</sup>



**51%**  
of sports fans are willing to pay for live/on-demand coverage<sup>13</sup>

<sup>11</sup> Nielsen Fan Insights, 2019-2022 January-April 2022, 12 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan South Korea (urban population), Spain, U.K., U.S.

<sup>12</sup> FIFA commissioned study 2019-2022

<sup>13</sup> FIFA commissioned study 2019-2022



# A numbers game: How data is central to fan engagement

When it comes to watching the World Cup, or any game for that matter, fans want to know everything as fast as possible—the highs, the lows and the surprise players who suddenly have greatness thrust upon them.

U.S. fans will always remember Landon Donovan's 91st minute goal against Algeria in the final game of the group stage of the 2010 World Cup. It sent the U.S. through as group winner, upended the teams advancing to the round of 16 and shifted opponents for the knockout rounds.

With one team's position often depending on the outcome of other games being played on the same day, fans want to know what's happening across the entire competition in real time—whether they're in the stands or on the couch.

By offering instant access to scores and standings in the tournament and historical data for additional context, broadcasters, platforms and streaming platforms can create a timely and dynamic World Cup interface that will attract and hold fans' attention across any device or channel. Gracenote Sports provides the services to do so.





## Micro case study

### Upping your data game

The key is tapping solutions that can capture vast amounts of data points and funnel them into structured schemas that broadcasters, streamers and platforms can then use to enhance their platform's World Cup experience and ensure new viewers discover it. Full schedules, live match results, play-by-play data, historical data, analysis from a team of experts—viewers need it all, updated live and around the clock.

One of the most exciting components of World Cup coverage is tournament predictions. Media organizations that can lead data-driven discussions and deliver focused analyses on the teams and players that are expected to win (or lose) big will be best-placed to captivate audiences and keep them coming back for more. The key is to work with partners who have access to granular data and can help convert that data into insights that fuel compelling stories and commentary.

When stakes (and emotions) are running high, it's critical to source accurate and comprehensive data to deliver a responsive viewing experience that immerses fans in the drama of the game and never leaves them guessing where to find the information or entertainment they want.



### Beijing 2022 Olympic Winter Games

**109**  
medals



**15**  
sports



**7.26 billion**  
data requests

*For the Beijing 2022 Olympic Winter Games, there were **109 medals** awarded across **15 sports** over the course of two weeks.<sup>14</sup> In that stretch of time, customers—including seven national broadcasters—tapped the Gracenote Sports API to field an astounding **7.26 billion data requests**. These data requests powered their results, schedules and standings content over the course of the games.*

<sup>14</sup> NBC Sports, February 2022



# Good as gold: Sports sponsorships perform

Brand sponsorships are critical for clubs' financial success. FC Barcelona recently signed a deal with Spotify that included naming rights at Camp Nou and shirt placement for the next three years. The price? US\$64 million per season.<sup>15</sup>

Brands are also an important part of the viewing experience. Even in an era of endless distractions, viewers are paying attention to sponsorships. Fifty-six percent of football fans actively inform themselves about brands engaged as a sports sponsor, and 67% agree that companies involved in sports sponsorships gain in appeal with the audience.<sup>16</sup>



## Data moment

**67%** of football fans think brands are more appealing when they participate in sports sponsorships.<sup>17</sup>

*compared to 52% of the general population*

**56%** of football fans are likely to inform themselves about brands that sponsor sporting events<sup>18</sup>

*compared to 39% of the general population*

**59%** of football fans would pick a sponsor's product over a rival's if price and quality were the same<sup>19</sup>

*compared to 45% of the general population*

<sup>15</sup> Sports Business Journal

<sup>16, 17, 18, 19</sup> Nielsen Fan Insights, February 2022, 13 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.



Data moment

## The non-alcoholic beverage industry continues to lead all brand categories in sponsorship expenditure

Percent of sponsorship expenditure by category

Industry	2019-2022 Qatar	2015-2018 Russia	2011-2014 Brazil
Non-alcoholic beverages	15.8%	17.3%	15.3%
Tourism	13.0%	8.4%	6.3%
Athletic apparel & equipment	11.8%	13.0%	14.2%
Automotive	9.5%	11.1%	11.5%
Construction & real estate	9.5%	7.8%	8.1%
Finance & banking	8.9%	9.8%	9.6%
Telecommunications	6.2%	3.1%	4.6%
Restaurants	5.9%	6.5%	1.1%
Personal consumer goods	5.1%	4.3%	1.8%
Consumer packaged food	3.6%	3.3%	6.9%
Beer	2.7%	2.9%	0.9%
Energy, fuel & oil	1.8%	10.4%	3.9%
Other	6.2%	2.1%	15.8%

It's not just brand affinity either; these sponsorships drive sales. Nielsen found that 59% of football fans would favor a sponsor's product over a rival's brand if price and quality were the same.<sup>20</sup> These behaviors are far more common in football enthusiasts than in the general population, indicating that sports sponsorships win big among fans.

The World Cup is one of the few global, mass-reach live events, so the pressure is on for both brands and the governing body to have increasingly sophisticated insights into which sponsorships resonate, and why.

According to Nielsen Sports' Sponsorglobe, the non-alcoholic drinks category continues to spend the most in sponsorship (by percentage), but tourism has made a big jump since the last World Cup in 2018. And speaking of jumps, Asia has accounted for 6% more in percent of sponsorship spend compared to the last World Cup Cycle. This speaks to a continued trend of rising sponsorship investments coming from Asia.

\*Includes official global FIFA Partners, FIFA World Cup Sponsors, National Supporters, and Regional Supporters

Source: Nielsen Sports SponsorGlobe (status as of 5/1/2022)

<sup>20</sup> Nielsen Fan Insights, February 2022, 13 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.



# Beyond the pitch: Meeting fans where they are to create an immersive experience

How fans interact with a global event like the World Cup is going to be as diverse as they are. There are behavioral differences between countries and between fans and non-fans, meaning brands and marketers need extensive data to make sure they're actually reaching the right audience.

In many places around the world, there's already a deep tradition of large-scale, close-down-the-street-type events. These are highly coveted spaces for brand activations. For example, in Berlin, the watch parties include collaborations with radio hosts and sponsors giving out free branded merch. Perhaps unsurprisingly, Germany had the lowest percentage of fans who said they'd watch the 2018 World Cup on their phones—just 4%.<sup>21</sup> These live events are likely to catch on more in North America, which will be hosting the 2026 World Cup across 16 host cities.

While the die-hards may be glued to the game on their TV or smart device, others are busy multitasking. Of football fans who watch sports, 69% are likely to order food while watching, 67% may be checking their email, and 60% might play an online game.<sup>22</sup> Globally, 42% of fans are interested in live-betting on football while watching, and in countries like Australia, France, and the U.S., the number is closer to 50%.<sup>23</sup>

<sup>21</sup> 2018 World Football Report

<sup>22, 24</sup> Nielsen Fan Insights, February 2022, 13 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.

<sup>23</sup> Nielsen Fan Insights, February 2022, 10 markets: Australia, Brazil (urban population), France, Germany, Italy, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.

## Data moment

### Fans that watch football like to multitask

	Football fans*	General population*
 <b>Ordering food delivery</b> <sup>24</sup>	69%	61%
 <b>Checking email</b> <sup>24</sup>	67%	60%
 <b>Playing online games</b> <sup>24</sup>	60%	54%
 <b>Live-betting</b> <sup>23</sup>	42%	31%

\*That watch sports on TV or other device



For brands, broadcasters and platforms, this attention-splitting presents potential opportunities. With roughly 80%<sup>25</sup> of fans browsing social media or using an app during a game, there are even more possibilities to integrate sponsors or timely match data on multiple platforms—even directly monetizing what’s happening on-field. It’s important to have a firm grasp of fans’ interest and media behaviors during the game to inform how brands show up, which messages resonate and how broadcasters and platforms should deliver insights.














However, every country’s fans are different. Take a look at social media use. Among football fans that watch sports globally, 81% check their social media while watching a match. However, there’s a wide range between countries.<sup>26</sup>



**Data moment**

**Most football fans check social media while watching a match, but it’s more common in some countries than others**

*Among fans that watch sports*

	<b>China</b>	90%
	<b>Brazil</b>	88%
	<b>India</b>	82%
	<b>U.S.</b>	82%
	<b>Australia</b>	78%
	<b>Russia</b>	77%
	<b>Spain</b>	77%
	<b>France</b>	72%
	<b>Italy</b>	71%
	<b>U.K.</b>	71%
	<b>Germany</b>	66%
	<b>South Korea</b>	62%
	<b>Japan</b>	43%

Source: Nielsen Fan Insights, February 2022

In Japan, just 43% of football fans who watch sports are scrolling through social media while the game is on. But in China, nearly everyone—a whopping 90%—is doing it. Knowing these nuances is an important consideration for brands deciding how they are going to reach and engage their target audience while the game is underway.<sup>27</sup>

Ultimately, what all of these behavioral stats suggest is that, at its core, the World Cup isn’t just a televised event. It’s the opportunity for a fully immersive experience, and the savviest broadcasters, brands and platforms will capitalize by providing content in all the places fans want to consume it.

According to FIFA, more than 5 billion people will watch at least some small part of the World Cup. With an audience as diverse as the countries represented on the field, it can be difficult to understand who you’re reaching and what they’re looking for. You need to go deep: behavioral habits and media engagement, all cut across cultural, economic and generational nuances. These are the critical ingredients for a complete viewership profile.

<sup>25, 26, 27</sup> Nielsen Fan Insights, February 2022, 13 markets: Australia, Brazil (urban population), China (urban population), France, Germany, India (urban population), Italy, Japan, Russia (urban population), South Korea (urban population), Spain, U.K., U.S.



# What fans want:

## 4 takeaways for the 2022 World Cup

# 1

### The world's sport still has room to grow

- Female football fans are more interested in the World Cup than any other major football competition. There's an opportunity through World Cup coverage, content and sponsorships to help turn casual female fans into loyal ones.
- Asian populations and brands continue to emerge on the World's stage. Football popularity is strong across Southeast Asia in countries with massive populations, which means that brands that capitalize on the opportunity will be well placed to reach and convert new fans in the region.

# 2

### Data drives modern sports viewing

- Fans expect reliable, real-time data that contextualize and enhance whatever match they're watching. This is particularly true in events like the World Cup, where one game's outcome can impact the position of several other teams.
- When properly structured, data integrations within the viewing experience can help fans find more of the World Cup content they want, when they want it. Of the football fans that watch sports, 80% are on their device while watching a match—and they're likely to want a lot of content.

# 3

### Sports sponsorships win big among fans

- Football fans are more likely than the general population to be influenced by sponsorship, affecting how they perceive a brand and what they're likely to buy.
- The non-alcoholic drinks category continues to spend the most on sponsorship (by percentage), but tourism sponsorships have made a big jump since 2018.

# 4

### Divided fan attention means opportunities for immersion

- The overwhelming majority of fans are multitasking on their devices while watching a match. This means there are even more possibilities to integrate sponsors and engage with fans during the World Cup.
- The World Cup isn't just a televised event. It's the opportunity for a fully immersive experience, and the savviest broadcasters, brands and platforms will capitalize by providing content in all the places fans want to consume it.



## Get in the game

*The data you need for a winning strategy*

Nielsen Sports delivers sponsorship analytics and fan data, helping brands and rights holders identify and connect with the audiences that matter most.

Gracenote offers comprehensive, up-to-date and highest-quality coverage of the tournament—plus a team of analysts delivering live context and clarity—enabling entertainment providers to create a better experience for audiences. Gracenote Sports also leverages its data expertise to generate tournament predictions—which provides media organizations with intel that helps put the competition into context and focus analysis by objectively assessing what is a shocking result and what isn't.

Combined, offerings from these two players can help you squeeze every ounce of enthusiasm from one of the world's biggest sporting events.





## About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics.

Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.

An S&P 500 company, Nielsen (NYSE: NLSN) operates around the world in more than 55 countries. Learn more at [www.nielsen.com](http://www.nielsen.com) or [www.nielsen.com/investors](http://www.nielsen.com/investors) and connect with us on social media.

## About Gracenote

Gracenote is the content solutions pillar of Nielsen providing entertainment metadata, content IDs and related offerings to the world's leading creators, distributors and platforms. Gracenote technology enables advanced content navigation and discovery capabilities ensuring consumers can easily connect to the TV shows, movies, music and sports they love while delivering powerful content analytics making complex business decisions simpler. Learn more at [www.gracenote.com](http://www.gracenote.com)

# Audience Is Everything™





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