

# TNS Syndicated Sports

An Overview on the Currency  
of Sports Fan Measurement



# Companies have used TNS syndicated sports surveys to save millions of dollars

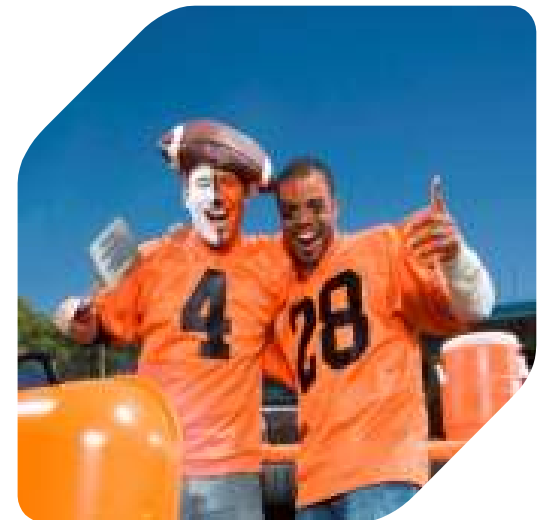
**ESPN Sports Poll:** Our flagship syndicated study: a continuous daily tracker of comprehensive coverage of sports attitudes and behaviors from a nationally representative sample.



**ESPN Sports Poll Europe:** Brand new in 2010, the Sports Poll model crosses the Atlantic to cover France, Germany, Italy, Spain, and the UK.

**ESPN Deportes Poll:** TNS Sports and Multicultural groups join forces to accurately reflect the US Hispanic population's sports interests and behaviors across all levels of acculturation.

**ESPN Children's Sports Poll:** Interviews with US children age 7-11 to understand their sports interest and behaviors.



# Business Questions Answered by TNS Syndicated Sports Programs

- Which sports offer the best opportunities to reach our target markets?
- At what level do fans of different sports consume our products and services vis-à-vis our competition?
- How is the popularity of a sport we are considering trending among our target markets?
- What opportunities in sports are we missing?
- Are there redundancies in our sports programs that we can eliminate?
- To what extent does an emerging sport have potential to grow? Should we be early adapters?
- How can I maximize the reach of my sports and entertainment programs?
- How much are we spending “per fan” for our sport? How does that match our expectations? Can we improve on the baseline level over time?

**More than data.** TNS provides you with the information you need to guide important decisions. Because sometimes it's not what you think, it is what you can prove. **Call it, “Gut Instinct Insurance”**



# Sports is a **multi-dimensional** activity that cannot be captured by TV ratings alone

The valid measure needed accounts for the following:

- **All the sports** that are available for properties to consider.
- **All the fans** so that sports can be compared across a common audience that represents the US population.
- **All the ways** that fans access sports.
- **All the time** to remove seasonality, and the ability to sustain the business to show trends and produce normative data.
- **Over time** 15 years of trending and normative data.
- And have industry-wide credibility.



**A common currency  
was needed**



# Comprehensive Coverage for **In-Depth Understanding**

## Favorite Sport

Fan levels in all sports

## Interest in major sporting events

Non-sports activities (movies, museums, restaurants, bars / nightclubs, etc.)

## Game and Event Viewing

Game and Event Attendance

## Favorite Teams and Players

Sponsorship Awareness

Media (Print, radio, television, online activity)

## Fantasy Sports

Home Entertainment (e.g. Video Games)

## Sports Participation

Consumer Product Categories (e.g. telecom, auto, QSRs, beer, soft drinks, banking, insurance, etc.)

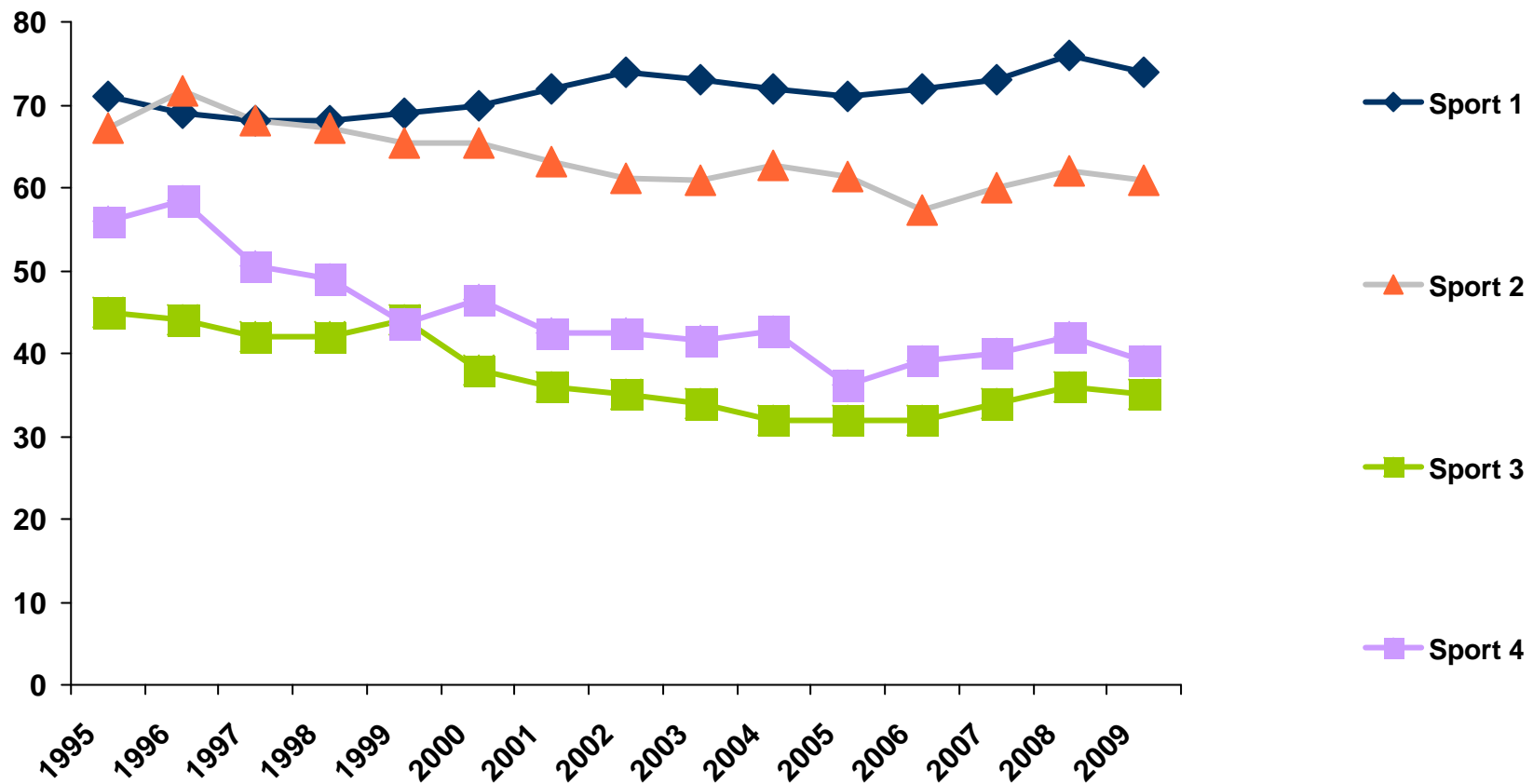
## Demographics

- The power of this study is that it is a *conversation* about sports in the context of sports.
- Sports first, then product questions.
- Syndicated data collection would cost \$1million annually for an individual buyer.



# Inform Negotiations by Assessing Today in the Context of Time

Each year validated by 12 individual monthly waves.



NOTE: Fictional data for example purposes

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# Identify Opportunities and Efficiencies Across Target Markets

	Total Percent of Market Area	12-17%	12-17 Index	Males % 12-24	Males 12-24	Females 25+ %	Females 25+ Index	Loyalists %	Loyalists Index	Prefers Brand %	Prefers Brand	Purch on the Spot %	Purch on the Spot
NFL	28.4%	30.7%	108	25.8%	91	30.4%	107	29.6%	104	31.0%	109	28.4%	100
Col Foot	28.2%	33.5%	119	26.0%	92	29.4%	104	25.7%	91	26.8%	95	25.2%	89
NASCAR	19.9%	22.1%	111	18.9%	95	22.0%	111	19.7%	99	22.9%	115	22.3%	112
MLB	19.6%	23.9%	122	18.3%	93	22.1%	113	18.6%	95	18.1%	92	18.5%	94
Col Bask	19.1%	18.6%	97	16.3%	85	17.5%	92	15.0%	79	18.3%	96	15.2%	80
MMA	17.4%	17.8%	102	17.3%	99	19.2%	110	18.0%	103	17.0%	98	17.8%	102
NBA	16.2%	11.9%	73	13.5%	83	15.3%	94	15.1%	93	13.1%	81	13.6%	84
FIGURE SKATING	14.8%	8.8%	59	15.4%	104	16.2%	109	15.7%	106	11.0%	74	8.7%	59
PRO WRESTLING	13.3%	7.6%	57	12.5%	94	9.2%	69	12.9%	97	14.0%	105	15.7%	118
BOXING	12.2%	13.3%	109	13.9%	114	13.4%	110	13.5%	111	16.8%	138	15.0%	123
NHRA	9.0%	7.0%	78	8.5%	94	9.4%	104	8.4%	93	11.0%	122	6.9%	77
PGA TOUR	8.8%	12.5%	142	9.3%	106	10.1%	115	8.0%	91	11.5%	131	10.7%	122
HORSE RACING	6.5%	6.4%	98	8.9%	137	6.9%	106	5.4%	83	7.4%	114	5.1%	78
INDYCAR	6.4%	3.4%	53	7.5%	117	6.9%	108	6.4%	100	8.7%	136	6.6%	103
ATP TENNIS	5.8%	3.8%	66	6.0%	103	4.8%	83	5.0%	86	4.4%	76	2.9%	50
NHL	5.5%	4.2%	76	5.1%	93	5.1%	93	5.4%	98	5.5%	100	3.6%	65
WTA TENNIS	4.6%	4.9%	107	5.9%	128	4.3%	93	4.2%	91	4.8%	104	4.6%	100
MLS	4.3%	3.8%	88	4.6%	107	4.0%	93	4.6%	107	5.4%	126	5.4%	126

Gold shading indicates target group is at least 25% more than the overall market to be an avid fan of that sport. Green shading index is 5% to 15% more likely. Red shows that the target market is significantly less likely than the overall population to be an avid fan. All data are FICTIONAL for example purposes only.



# How Clients Access ESPN Sports Poll Information

Not all users require a subscription.

- Sports Poll sets the stage for your sports marketing program with a market landscape profile from the syndicate data
  - TNS creates custom market structure studies that reflect your target market to set the foundation or answer specific business questions.
- Select topline reports available through Turnkey Activator (beginning August 2010).
- Standard Sports Poll reports can be purchased through TNS website (beginning September 2010).



For those who need a continuous flow of information...

- **Online access** through a user friendly data query system.
- **Custom reporting** available.
- **Trial subscriptions** are available starting at \$15,000.



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# ESPN Sports Poll Europe

## Methodology & Deliverable

- Countries covered:  
France, Germany, Italy, Spain, UK
- 500 adults 18+ per country per month or 6000 per year
- Data collected via online panel. 20 minute interview
- Monthly data collection in 2010
- Results delivered four times in tab form and online via Info Explorer.
- Investment: \$30,000 USD for Q1 and Q2.

### Topics include:

- Interest level in sports including major global events, sports well-known in their home country and emerging sports best known in the US.
- Television viewing, attendance, participation in athletic activities.
- Traditional and new media activity.
- Usage metrics on select consumer products and service.



# ESPN Deportes Poll

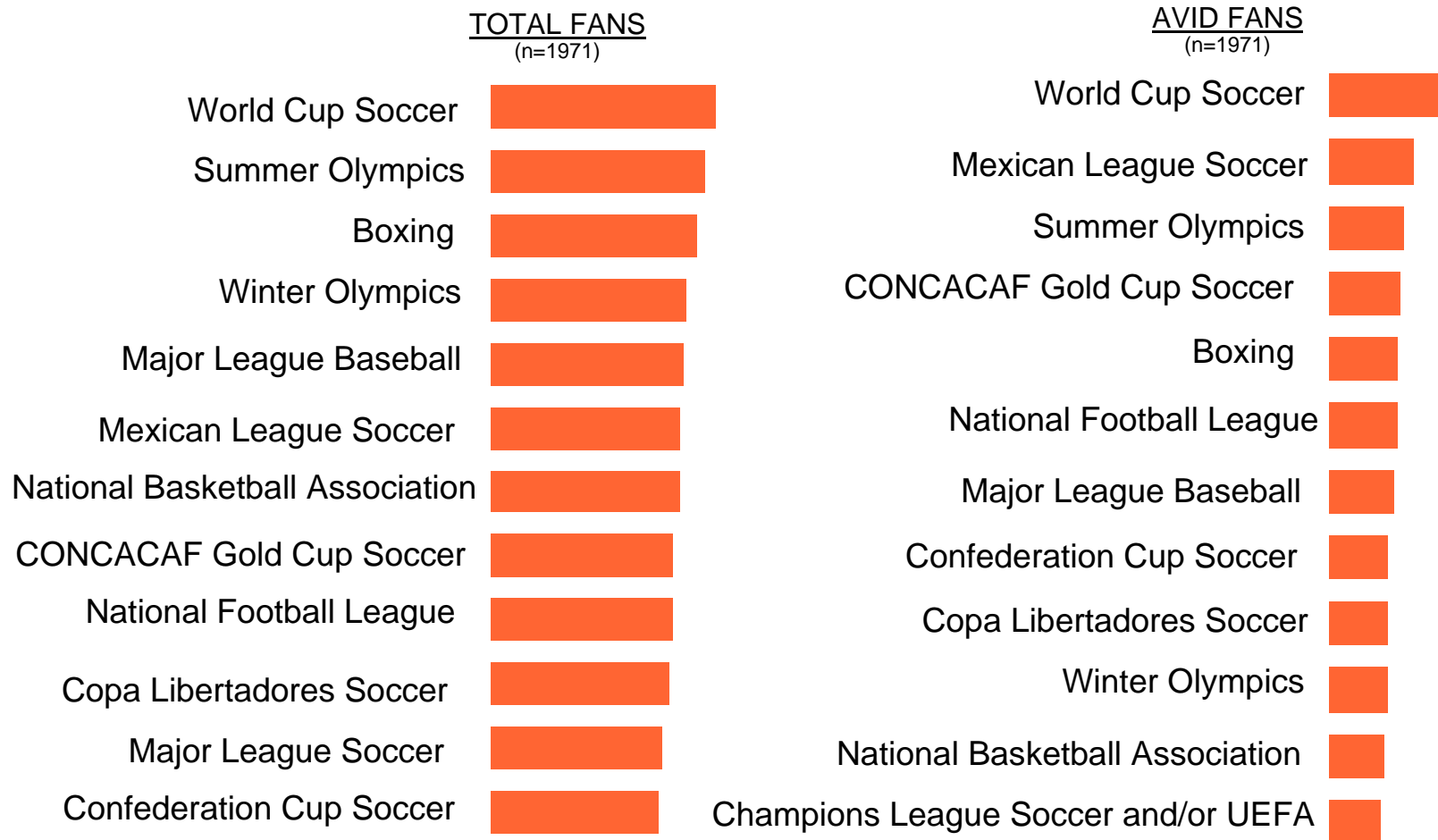
## Sports Poll Was Not Fully Accounting for US Hispanics

- The ESPN Sports Poll reaches mostly English-speaking Hispanics.
- The ESPN Deportes Poll reflects this community across all levels of acculturation to measure fan interest, media habits, favorite teams and consumer preferences.
- 4 waves a year
- Hybrid Sampling – mixture of RDD and Hispanic Surname.
- Sample size is n=2,000 Hispanics in the U.S. population ages 18+.
- Survey offered in both Spanish (85% of interviews) and English languages (15% of interviews).
- Investment: \$15,000 per year.



# Fan Interest Among US Hispanics

Based on 2009 ESPN Deportes Poll.



# ESPN Children's Sports Poll

## Background

The ESPN Children's Sports Poll began in 1998. Its goal was to assess the sports interests and behaviors of America's youngest fans. Designed by three major sports leagues and the Sports Poll team, the study demonstrated how and when sports allegiances form. By understanding the mindset of these fans, and how they differ from their parents, leagues could better assess how to engage the children on their terms, helping to ensure fan avidity by the time they reached their teens.

## Methodology & Deliverable

- 1001 telephone interviews fielded over two waves a year with children in the US age seven to eleven.
- Topline delivered after Wave One. Full report after both waves.
- Investment: \$15,000 per year.



# Some of the best-known brands in sports have referenced Sports Poll data



Random selection of companies that have used our data.



To discuss the applications of  
TNS Syndicated Sports programs for your  
business, please contact Robert Fox or visit:

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# Thank you!

