



# THE POWER OF “OUR TEAM”

## DISSECTING THE CONNECTION BETWEEN HOME TEAM AND A COMMUNITY

SEPTEMBER 2017

# WHAT'S INSIDE

## THE 5TH NETWORK

Quantifying the importance of the home team

## HOME TEAM AUDIENCE SENSIBILITY

Understanding that it isn't just "a show"

## THE UNMATCHED "HALO" EFFECT

Seeing the connection play out





NIELSEN INSIGHTS  
**THE FIFTH NETWORK:**  
REGIONAL SPORTS NETWORK PASSION INDEX

DECEMBER 2016





# BACKGROUND & OBJECTIVE

There is **tremendous value** in being the tangible touchpoint between **fan and team** – i.e. the Regional Sports Network

The **goal** of this study was to **better understand and quantify** the emotional side of this fan/team connection

More specifically, we sought to determine how **"essential"** the RSNs are in an absolute sense, and how that translates into **"passion"** among the RSN audience

“ Any game becomes important when you know the players... ”

- W.P. Kinsella



# OUR APPROACH: THE ESSENTIAL INDEX

## NIELSEN DESIGNED AN "ESSENTIAL INDEX"

Discrete Choices that respondents are **forced** to make in a series of questions

Scores are among **subscribers** who are **sports fans**

## MAX-DIFF PROCESS

Ranks and assigns value to each network selected

A binary "**this or that**" choice rather than measuring **strength of preference** – eliminating scale use bias

Unambiguous results are **easy to interpret**

- ❖ Easy for respondents
- ❖ Culturally invariant
- ❖ No scale bias
- ❖ Implements trade-off
- ❖ Robust mechanism
- ❖ Powerful data for predictions

## IT'S THIS SIMPLE

Of the networks below, which one would you keep and which one would you discard?

Keep (Couldn't live without)		Discard (Don't need this at all)
<input type="radio"/>	CNN	<input type="radio"/>
<input type="radio"/>	FOX SPORTS DETROIT	<input type="radio"/>

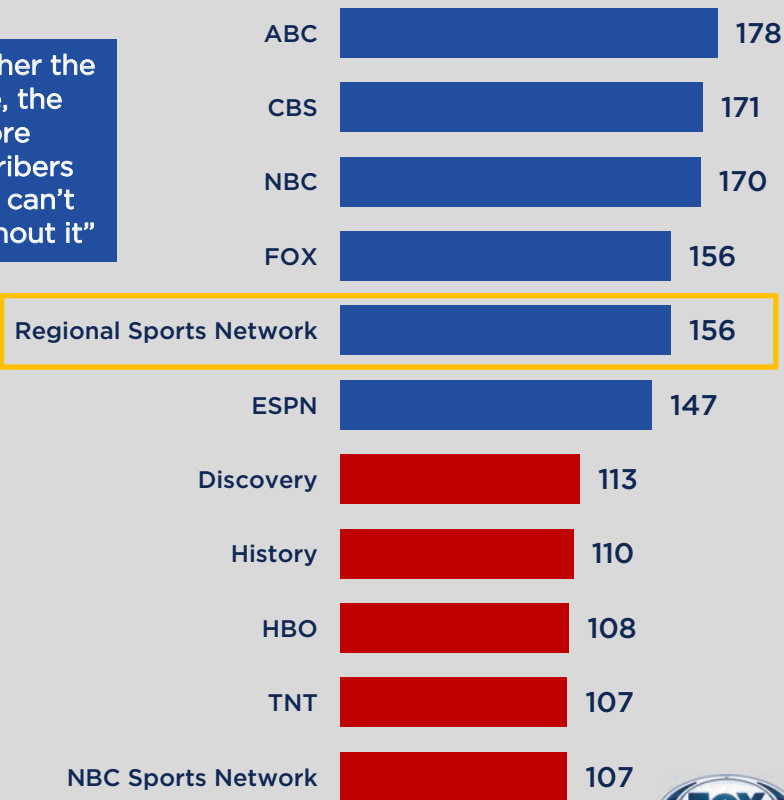
# RSN's ARE THE 5TH NETWORK



The higher the score, the more subscribers said "I can't live without it"

## NIELSEN ESSENTIAL INDEX - RESULTS

All respondents



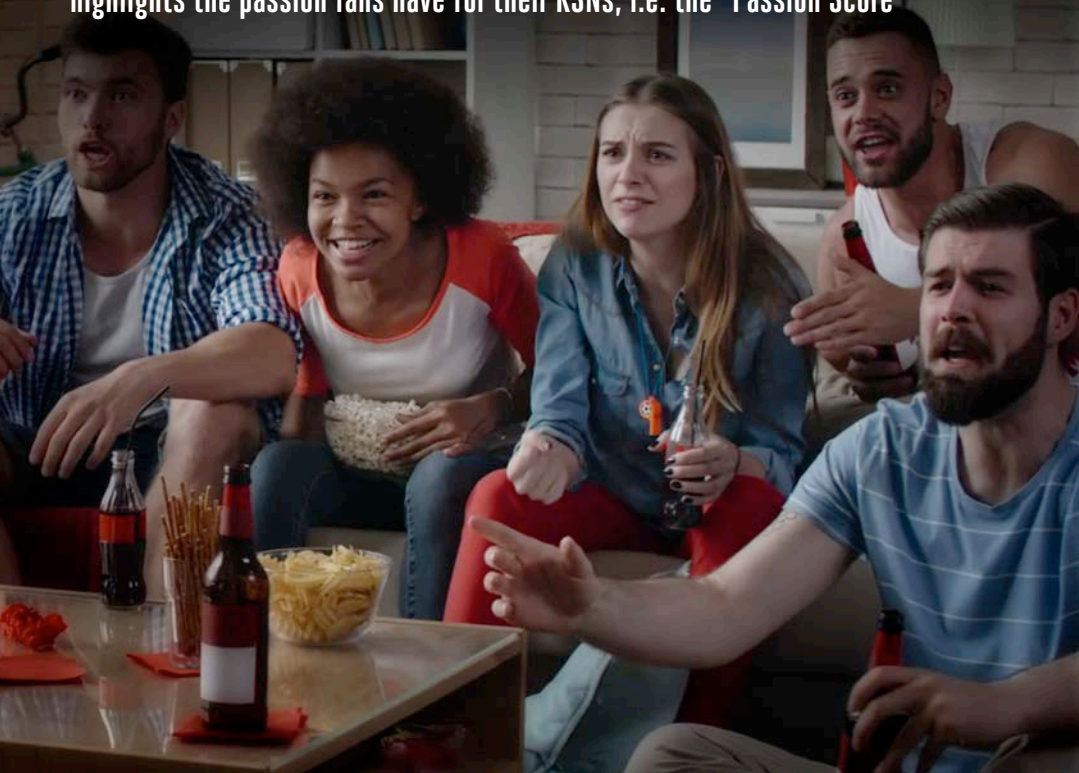
■ Top Tier (145+)

■ Mid Tier (90-144)



# RSN's GENERATE UNMATCHED PASSION

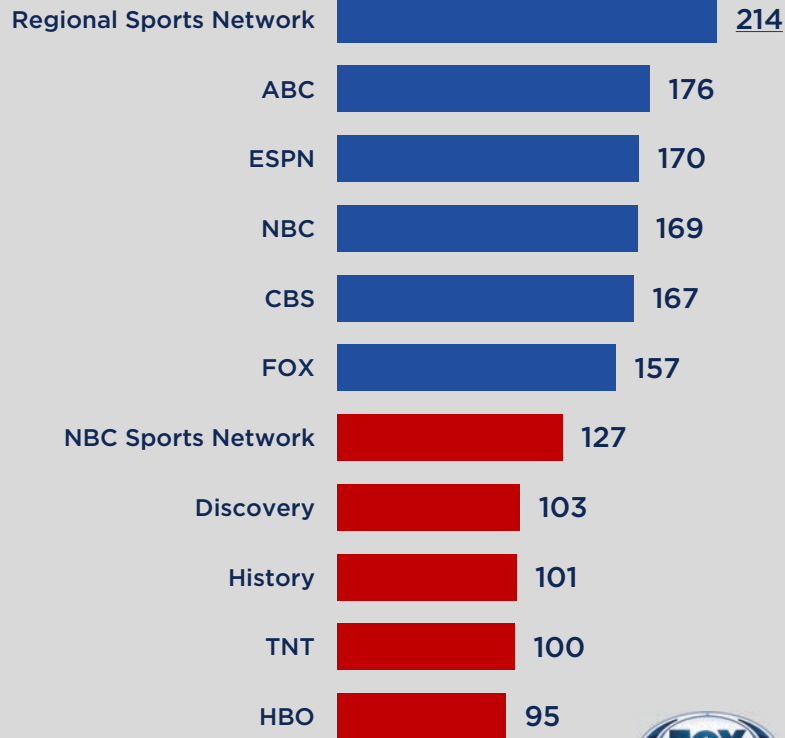
Focusing solely on the RSN viewer responses, Nielsen's "Essential Score" highlights the passion fans have for their RSNs, i.e. the "Passion Score"



## PASSION SCORES – AMONG RSN VIEWERS

Subscriber selects "couldn't live without" = score goes up

Subscriber selects "don't need this at all" = score goes down



■ Top Tier (145+)

■ Mid Tier (90-144)



# RSNs ARE A FORCE IN PRIMETIME

NIELSEN CUSTOM ANALYSIS IN SEPT. 2016 SHOWED FOX RSNs AVERAGED:

1.51 Million Viewers in Prime

439k in Total Day

FOX RSNs WOULD HAVE RANKED #3 IN CABLE PRIME

ESPN	2.84m
FNC	2.49m
FOX RSNs	1.51m
HGTV	1.46m
USA	1.30m





# THE #2 NETWORK IN CABLE SPORTS

Based on Nielsen's September 2016 analysis, we project that FOX RSNs delivered 174 billion minutes of viewing In 2016

This would make our RSNs the 2nd most-watched Network in cable sports

## CABLE SPORTS NETS – 2016 TOTAL MINUTES VIEWED

ESPN	433bn	NBCSN	87bn
FOX RSNs	174bn	NFLN	83bn
ESPN2	128bn	TNT	65bn
FS1	91bn	COMC RSNs	57bn





# HOME TEAM AUDIENCE SENSIBILITY

UNDERSTANDING THAT IT ISN'T JUST "A SHOW"



NETWORKS.



# THE HOME TEAM IS IN THEIR DNA

60%

SAY "MY HOME TEAM HELPS  
DEFINE WHO I AM"



52%

SAY IT MAKES THEIR FAMILY  
RELATIONSHIPS STRONGER



“

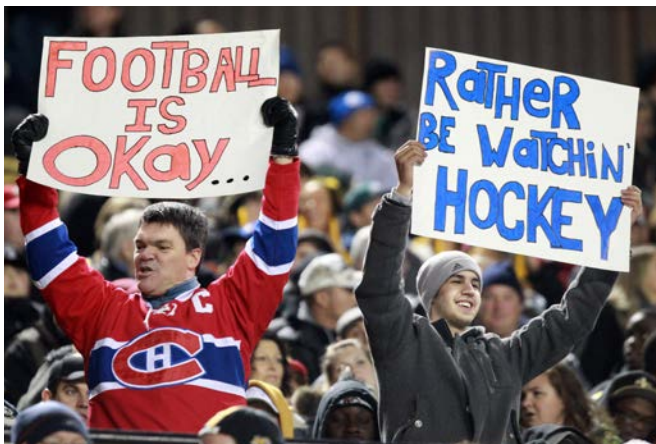
Sports is like water to me. I can't live without it.

”



# COMES FROM YEARS OF LOYALTY

**56%** OF HOME TEAM NBA/NHL  
FANS HAVE BEEN SO FOR OVER  
20 YEARS



**64%** OF NEW PRIME TIME TELEVISIONS  
SHOWS DON'T MAKE IT PAST  
SEASON 2



“

There would be little reason for me to be alive if all sports were taken away for a year.

”

# “WHAT ARE SOME EXAMPLES OF YOUR CONNECTION?”

“ I’m way too addicted to my teams. I mean, if I had put just 20% of that time to something else, I could have been a brain surgeon or something”

“ When you’re going into a relationship, a girl might ask [your favorite team]? And if you answer the wrong way, or she answers the wrong way, that just might not work out.”

“ The change of the season is marked by the change in sports. I would be lost.”

“ I’m getting married, and we had to look at all the schedules to make sure that we don’t get married during a game or something. We’re getting married on March 9. It’s before baseball and March Madness, but after the Super Bowl. It’s kind of a dead spot”



NETWORKS.

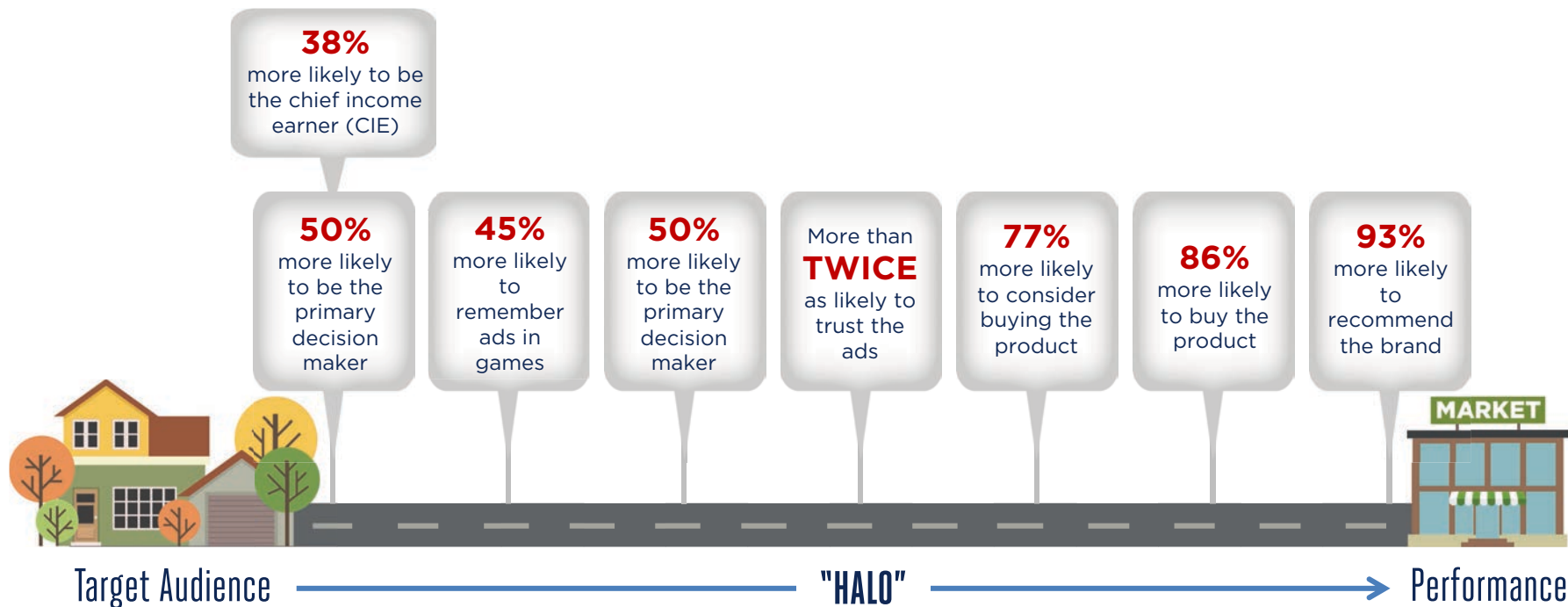


# THE UNMATCHED “HALO” EFFECT

## SEEING THE CONNECTION PLAY OUT



# PATH TO PURCHASE TIMELINE





THANK YOU

