

HANDBALL IN SPORTMARKETING RESEARCH

The change in fan behavior and
how we can benefit by using digital

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FOR INTERNAL USE ONLY

01

Fundamental changes in communication through digitalization

02

Identifying fans

03

Addressing fans

04

Practical examples

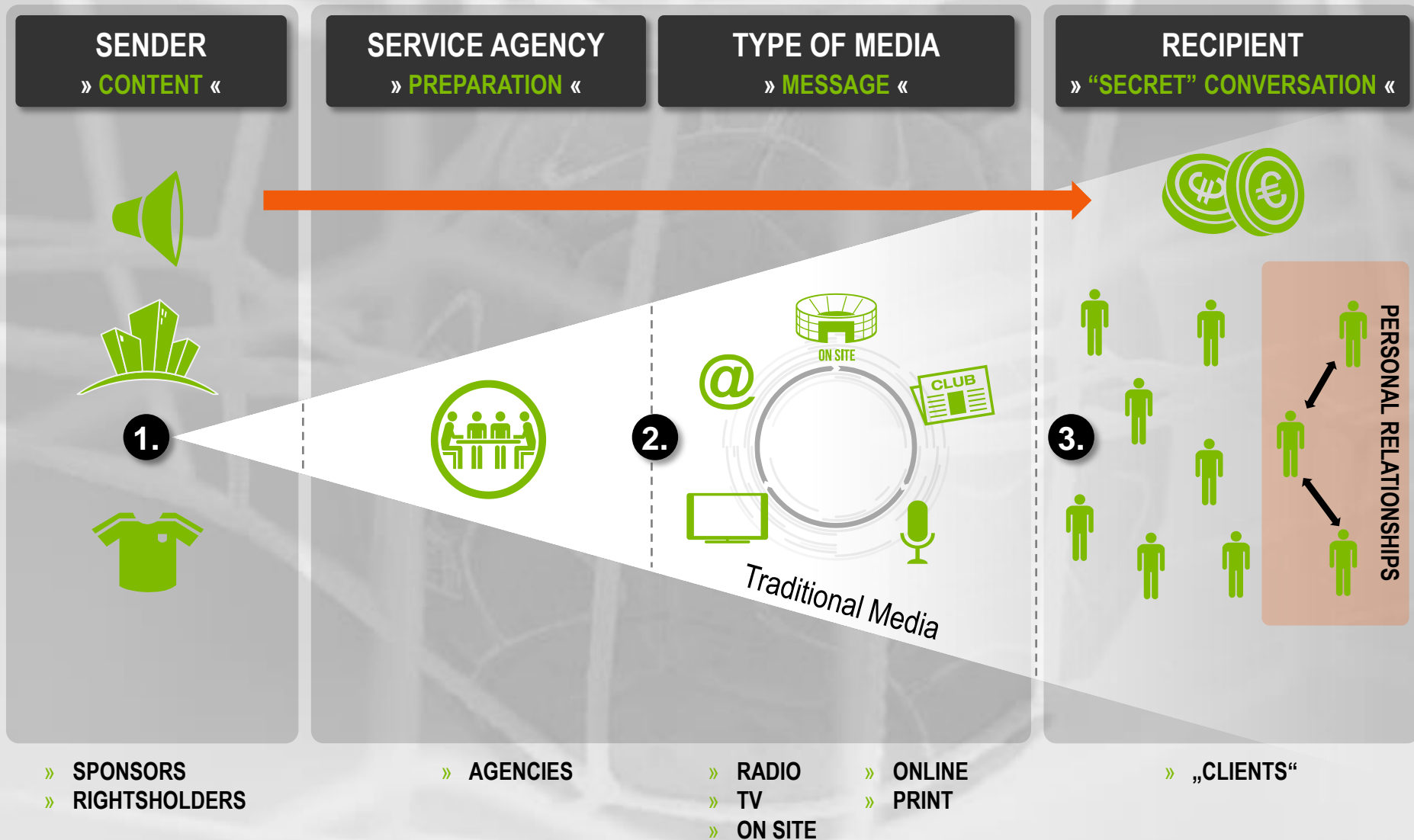
01

FUNDAMENTAL CHANGES IN COMMUNICATION THROUGH DIGITALIZATION



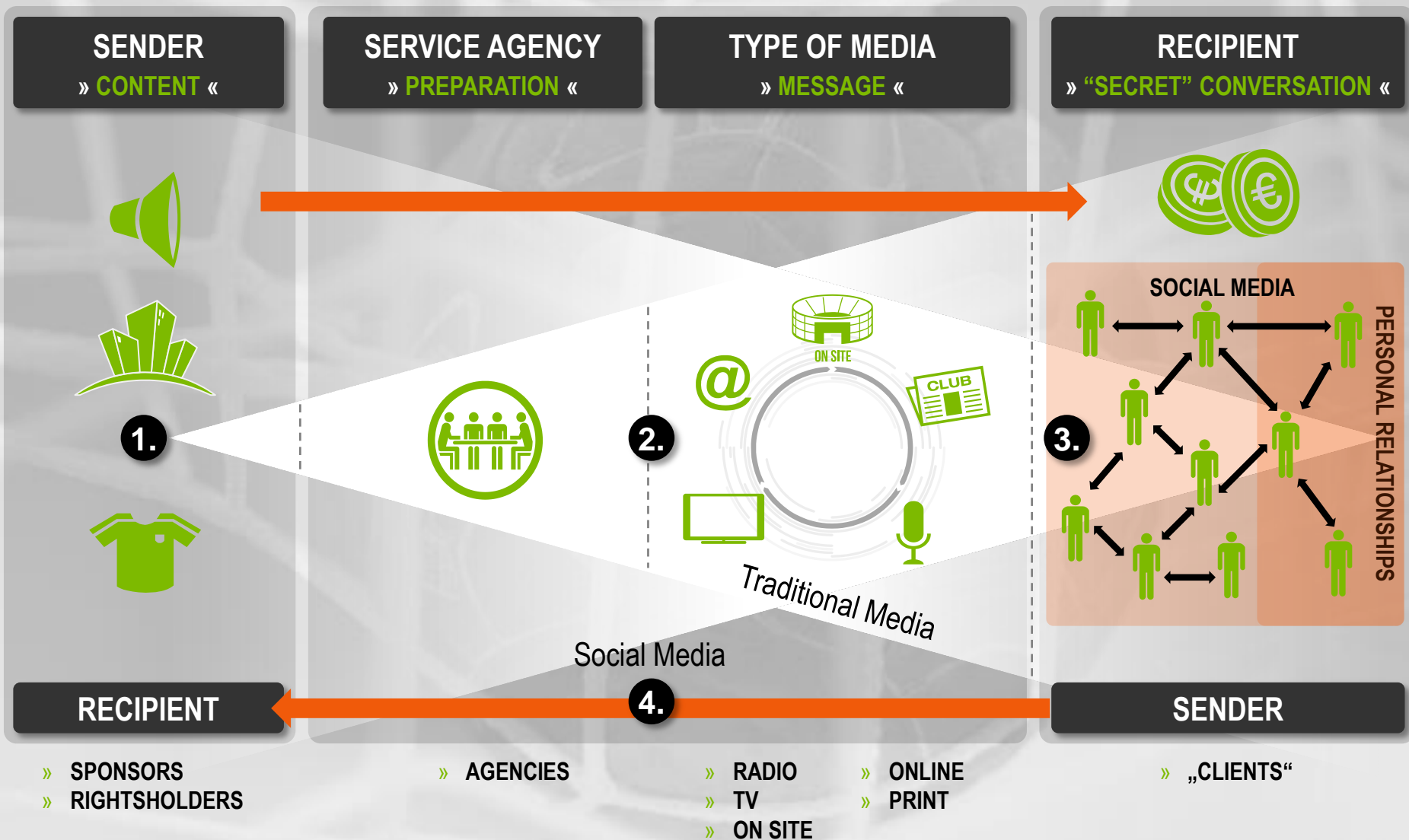
OLD COMMUNICATION MODEL: PUSH-COMMUNICATION BY COMPANIES

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NEW COMMUNICATION MODEL: SOCIAL MEDIA ENABLES EXCHANGE IN REAL TIME

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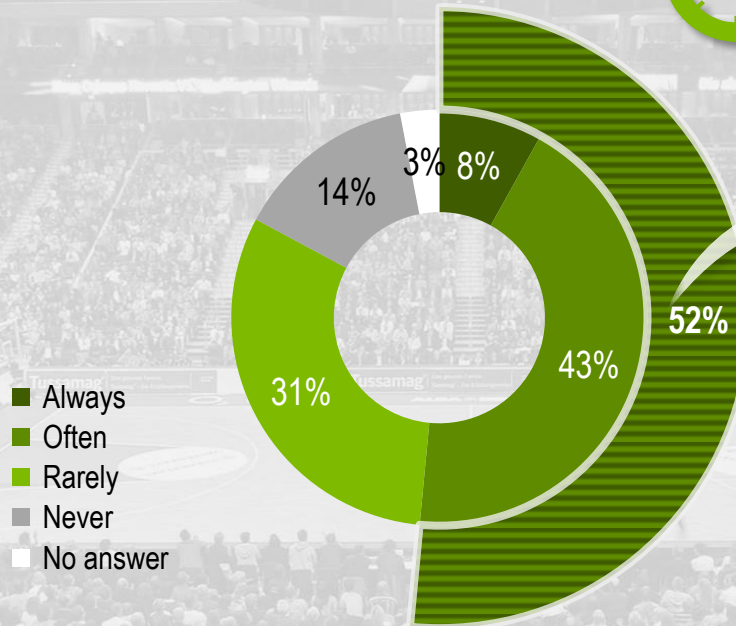


THE RISE OF SECOND SCREENING & THE IMPORTANCE OF MILLENIALS

SECOND SCREENING DURING TV BROADCASTS

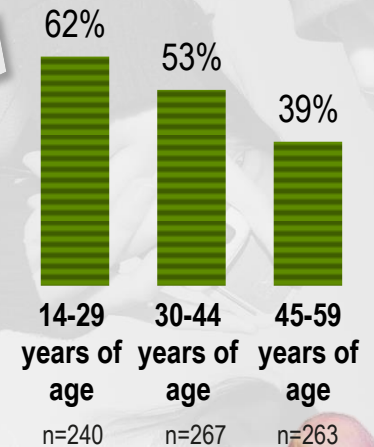


On average **39%** of the Multi-Screeners are also online during the broadcast time

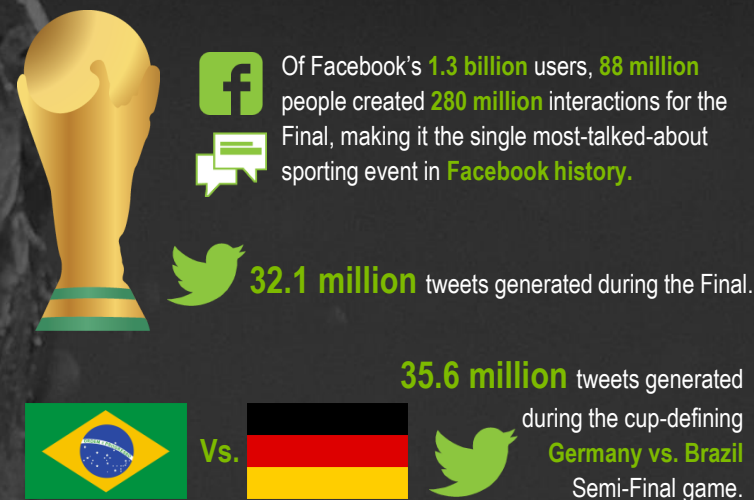


- Always
- Often
- Rarely
- Never
- No answer

TOP-2-BOX
"Always" + "Often"



Basis: 770 representative respondents between the ages 14 and 59 years, who use Free-TV or Pay-TV to gather information about sport



Approximately **14%** increase in Fans on Facebook Page from the Beginning Of the World Cup until the End.

Over **600k** Fans still make him by far the most popular Player in Handball, but also shows huge Gap compared to Football Players.



NIKOLA KARABATIC



94.401 social posts generated on Final Day.



>31.500 tweets were generated during the Final.



Vs.



342.269

Tweets during the Tournament

Top Countries

1. France (77k)
2. Argentina (28k)
3. Germany (14k)

Top Hashtags

1. #handball (97k)
2. #qatar2015 (45k)
3. #handballwm (15k)
4. #fraqat (14k)
5. #finale (6,7k)

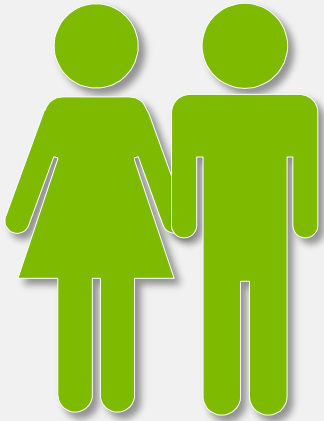
Top @Mentions

1. @gladiadoreshb
2. @2015handball
3. @ffhandball
4. @nkarabatic
5. @handballvine

02

IDENTIFYING FANS





1 QUALITATIVE PRESTAGE – Social Media Analysis

- » Who?
- » What?
- » Where?
- » How?



2 QUANTITATIVE STAGE - Online Market Research

SportsDNA – FAN DNA

B-2-C

INTERESTED IN
HANDBALL

SYMPATHISERS OF
HANDBALL

FANS OF HANDBALL



1 QUALITATIVE PRESTAGE – Social Media Analysis

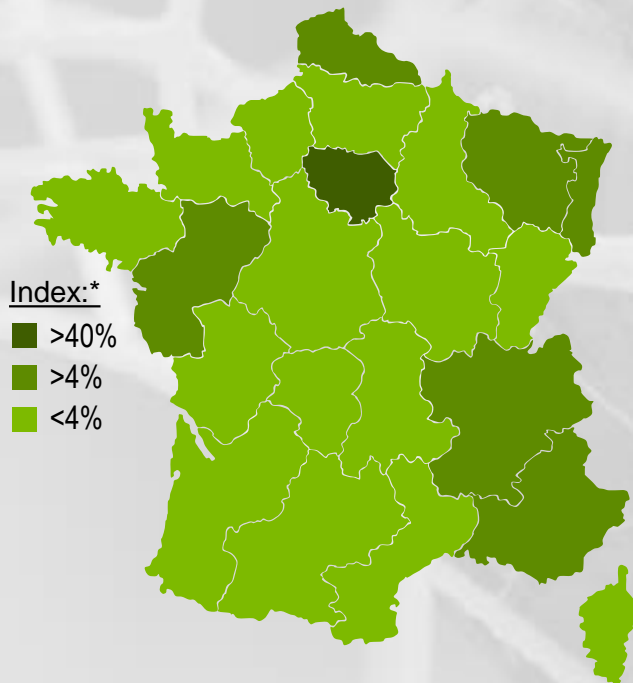
Total amount of conversations about keyword handball worldwide first quarter of 2015:



1 QUALITATIVE PRESTAGE – Social Media Analysis



Total Buzz for 3 month: ~125.000



General demographics

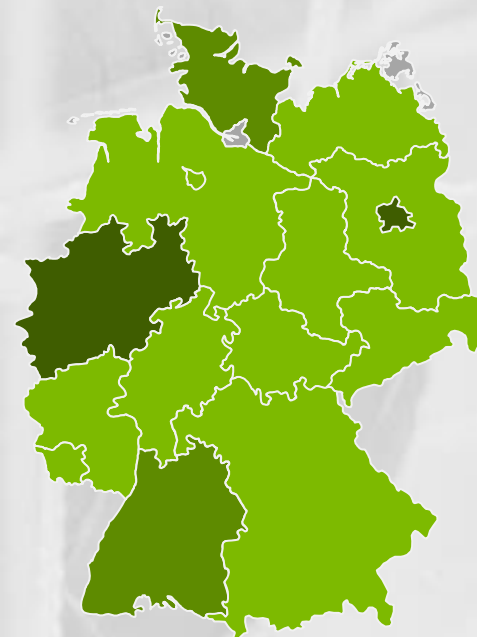


~30 years

Tonality	Percentage
Positive	23%
Neutral	60%
Negative	17%



Total Buzz for 3 month: ~27.500



1 QUALITATIVE PRESTAGE – Social Media Analysis

- » Who?
- » What?
- » Where?
- » How?



2 QUANTITATIVE STAGE - Online Market Research

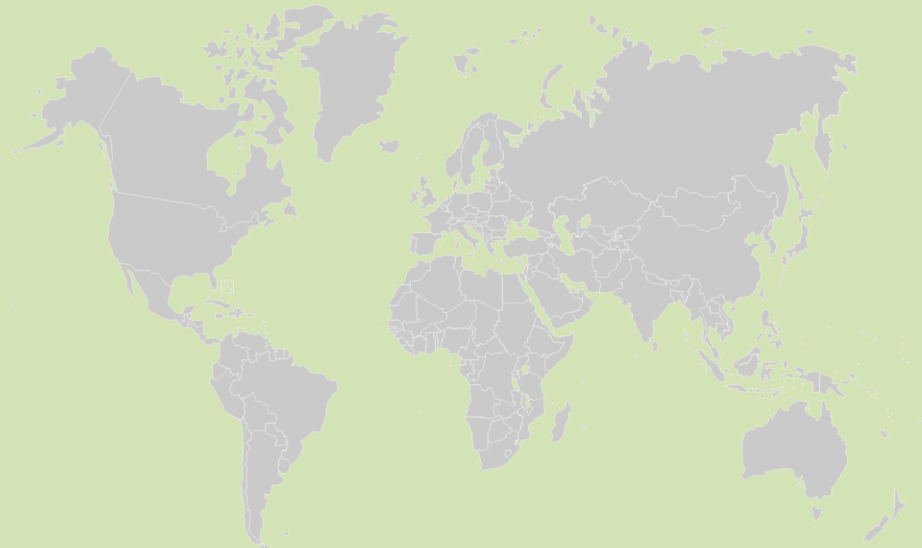
SportsDNA – FAN DNA

B-2-C

INTERESTED IN
HANDBALL

SYMPATHISERS OF
HANDBALL

FANS OF HANDBALL



BEHAVIOURAL FAN SEGMENTS

CONNECTION



TREND POSITIVE



GAME EXPERT



ARMCHAIR



BUSY



CYNIC



DISENGAGED

Global Average %



TREND POSITIVE



Love my sport. Love what it says about me.



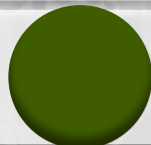
GAME EXPERT



All about the sport, everything else is a distraction.



CONNECTION FAN



It's about participating, it brings people together.



ARMCHAIR FAN



Something to watch on my own.



BUSY



If only I had time!



DISENGAGED



What's all the fuss about?

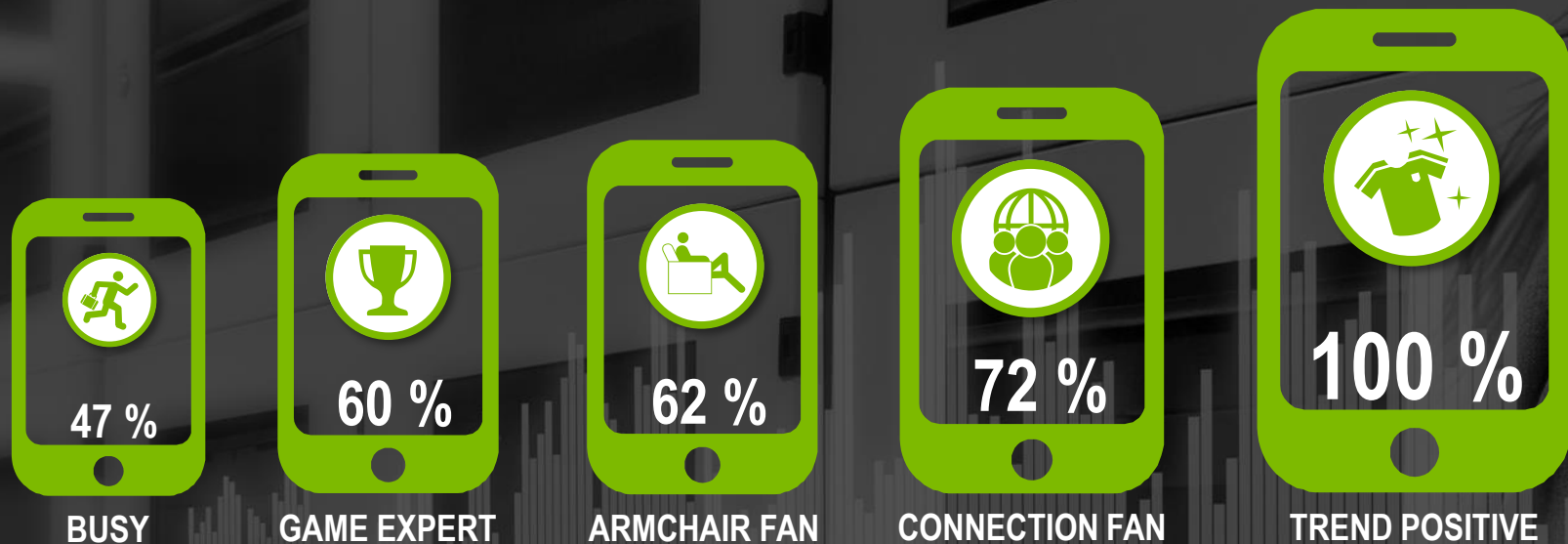


CYNIC



It's all a con!

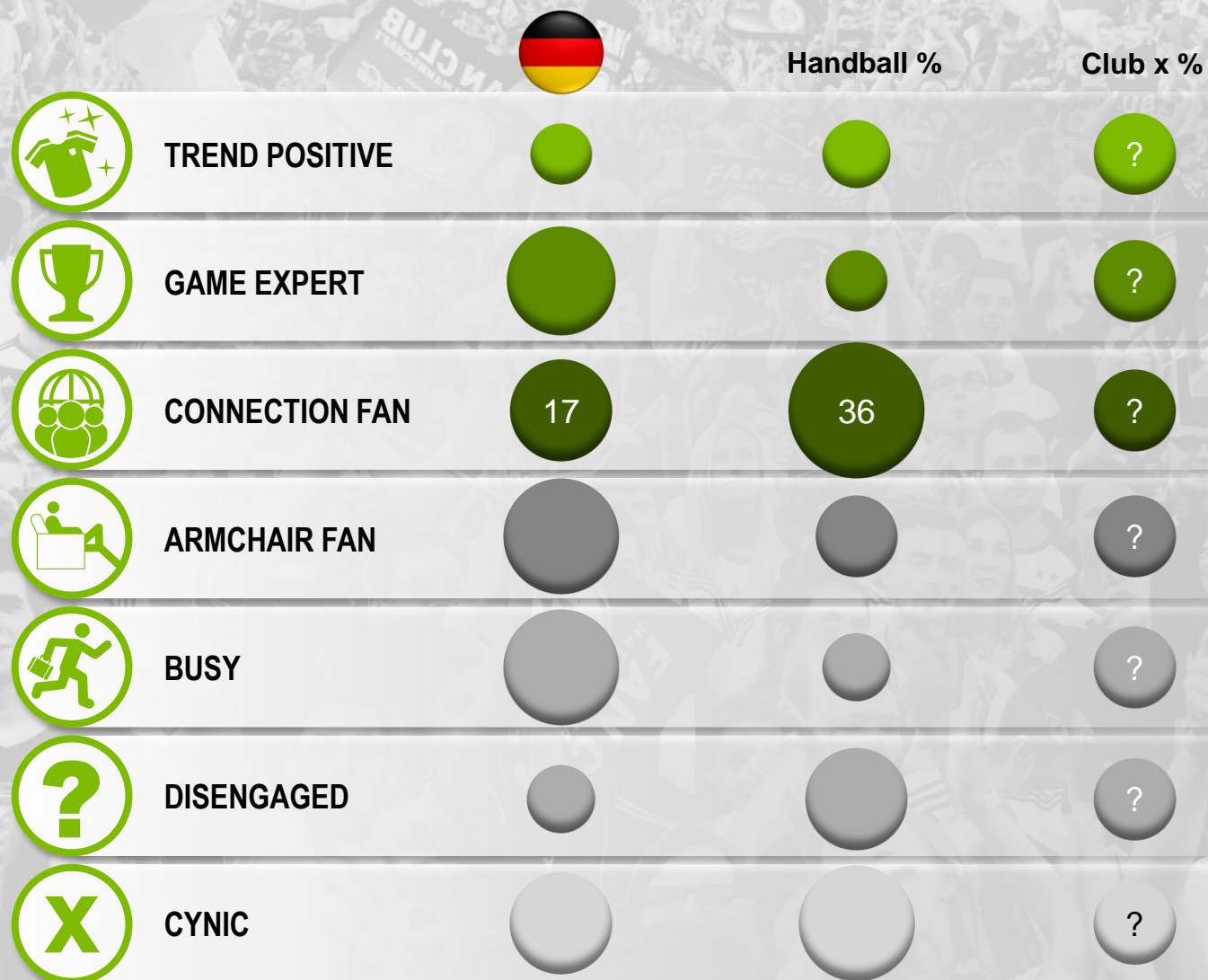
REACHING THE MAJORITY OF THE FANS VIA DIGITAL CHANNELS



Note: Score derived from degree of agreement concerning different statements of using technology.

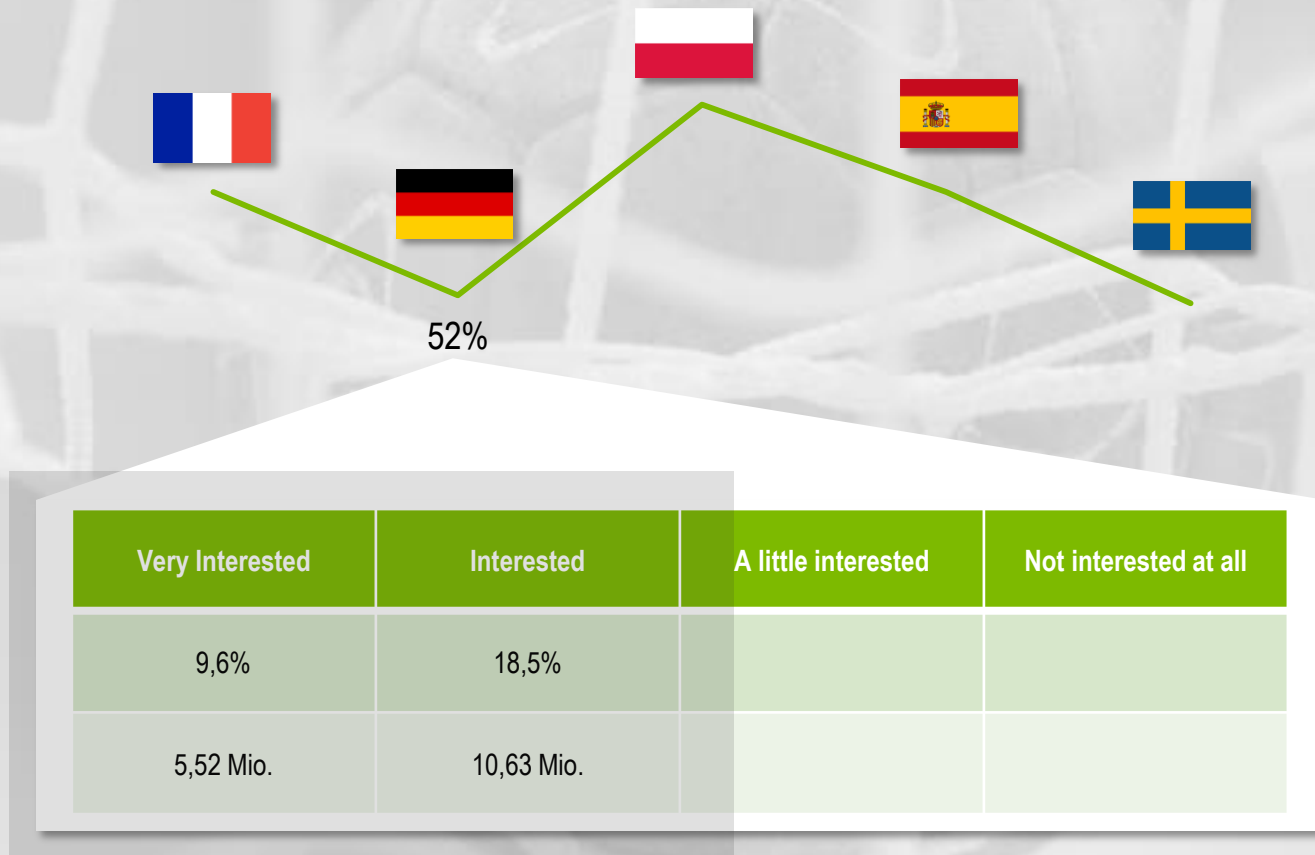
THE 7 BEHAVIOURAL SEGMENTS IN GERMANY

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2 QUANTITATIVE STAGE - Online Market Research

Question: How would you describe the level of interest for the following sports? [Figures in %]



2 QUANTITATIVE STAGE - Online Market Research



People interested in
Handball (Top-2 Box):
16.15 Mio.



Very interested

Interested

Top-2 Box

In Total of population (Mio.)

TREND POSITIVE	GAME EXPERT	CONNEC- TION FAN	ARMCHAIR FAN	BUSY	DIS- ENGAGED	CYNIC
67,6%	39,1%	43,7%	43,7%	8,1%	6,3%	4,1%
2,67	1,04	8,93	2,43	0,34	0,58	0,47

HIGH POTENTIAL TO BE WON AS FANS

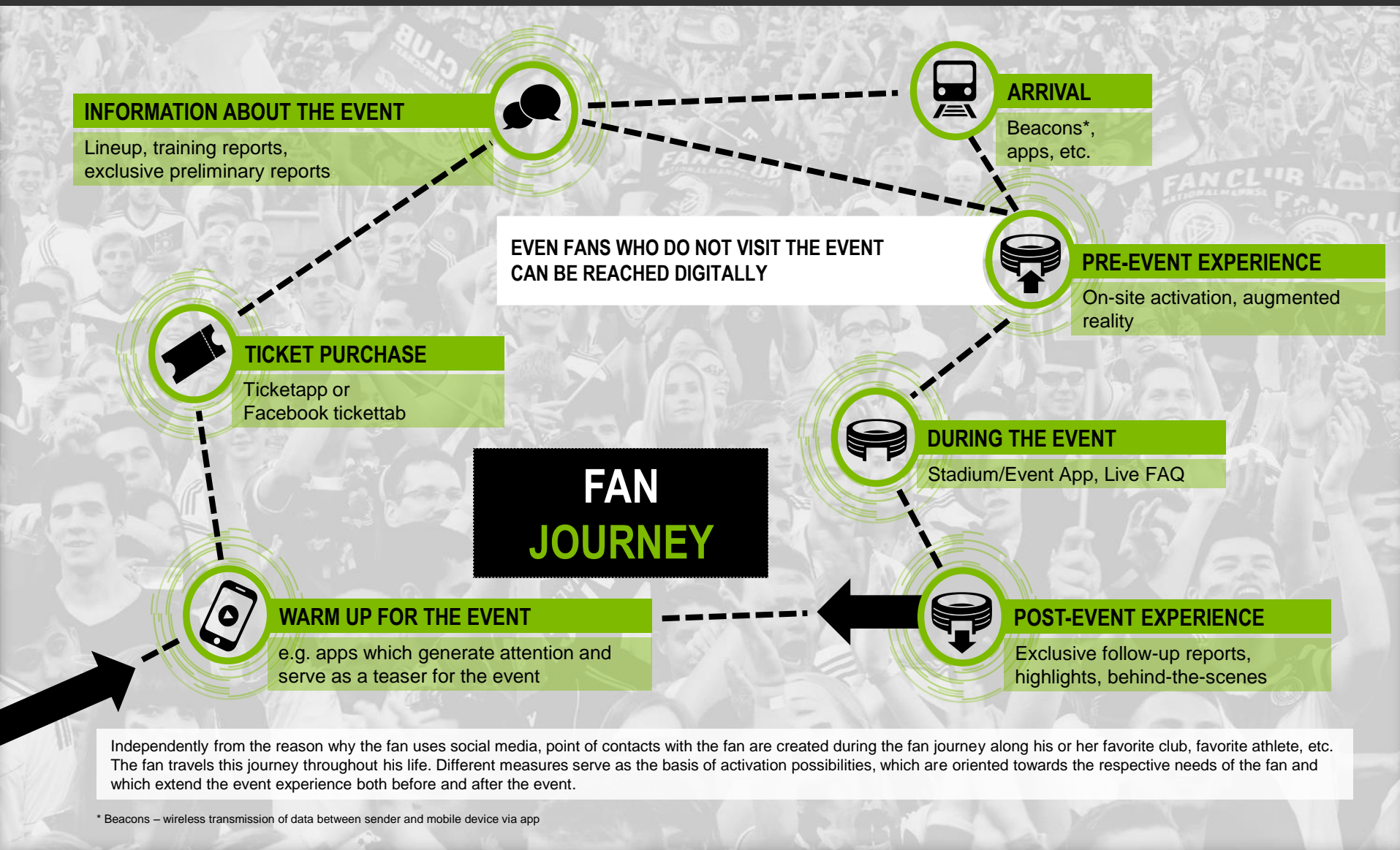
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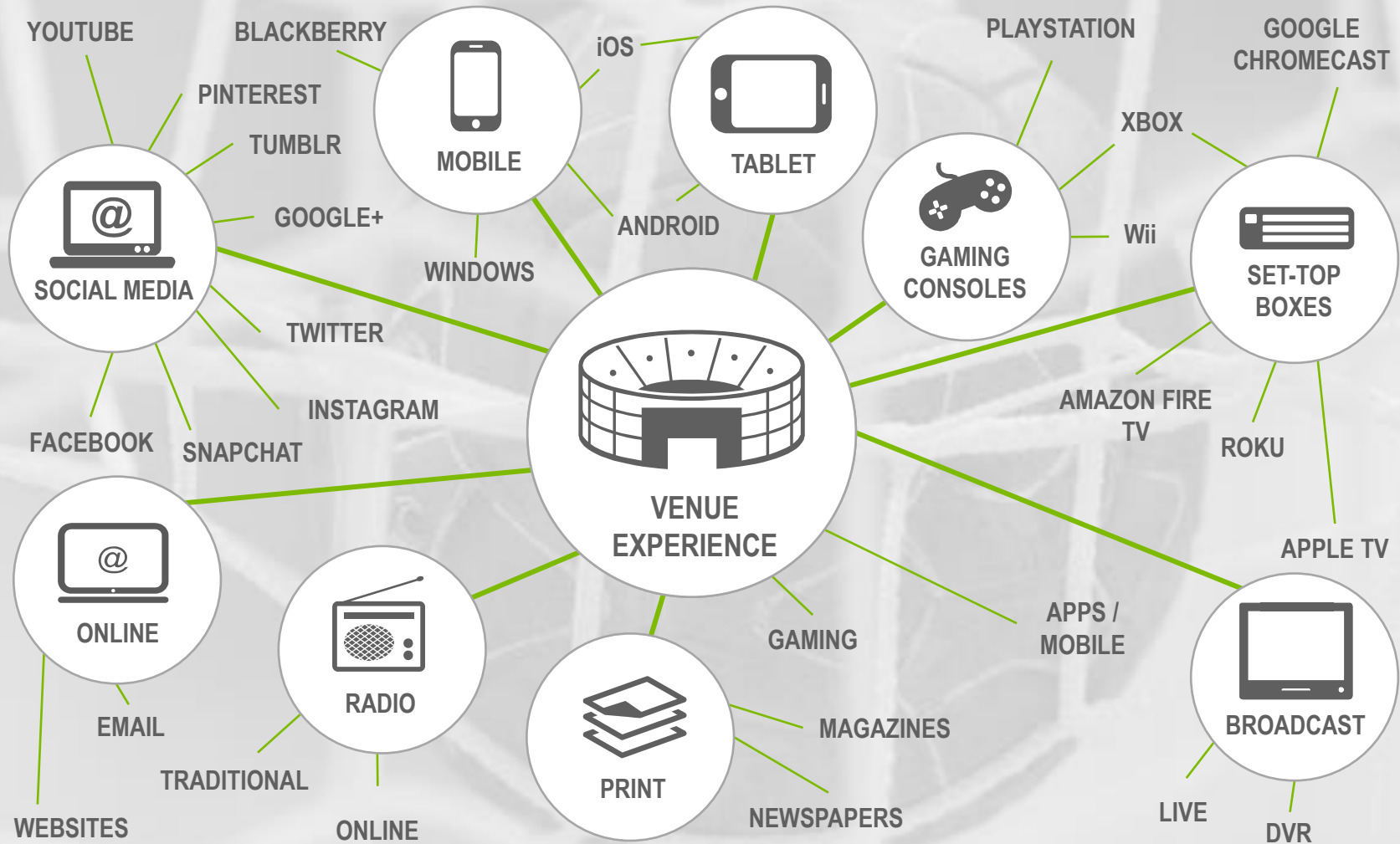
ADDRESSING FANS



FANS LIVE WITH THERE CLUB 24/7 AND ALONG DIFFERENT TOUCHPOINTS – THEY CAN BE ADDRESSED ALMOST EVERYWHERE

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THE RIGHT CONTENT IS DELIVERED BY RIGHTS HOLDERS – CREATING
FAN STORIES WITH SPONSORS IS THE KEY TO SUCCESS

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01 CONTENT

Exclusive and interactive content as well as personal benefits are important success factors.

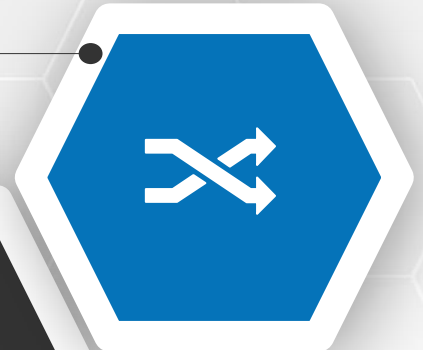
02 HUMAN MOTIVES

Social and individual motives influence success of digital activities and activations

03

CHANNEL COMMUNICATION

Digital activities will be most successful when played specifically for each channel and when linked over all different channels with channel specific mechanisms





SOCIAL MEDIA USED TO GENERATE INFORMATION ABOUT SPORTS



Facebook



YouTube



WhatsApp



Google+



Twitter

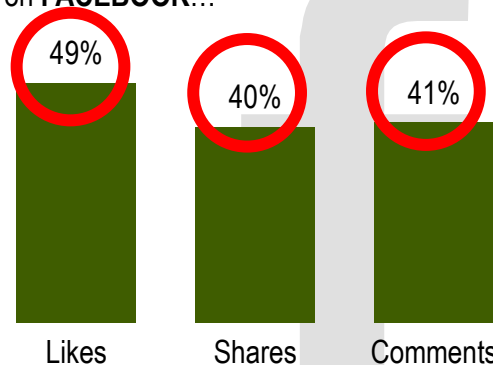


Instagram



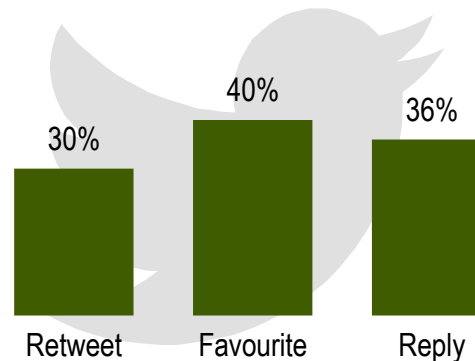
Vimeo

Sports teams or organisationen minimum once per week on **FACEBOOK**...



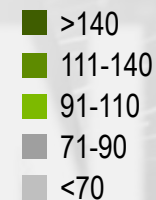
Basis: User on Facebook for sports information

Sports teams or organisationen minimum once per week on **TWITTER**...



Basis: User on Twitter for sports information

Index:*



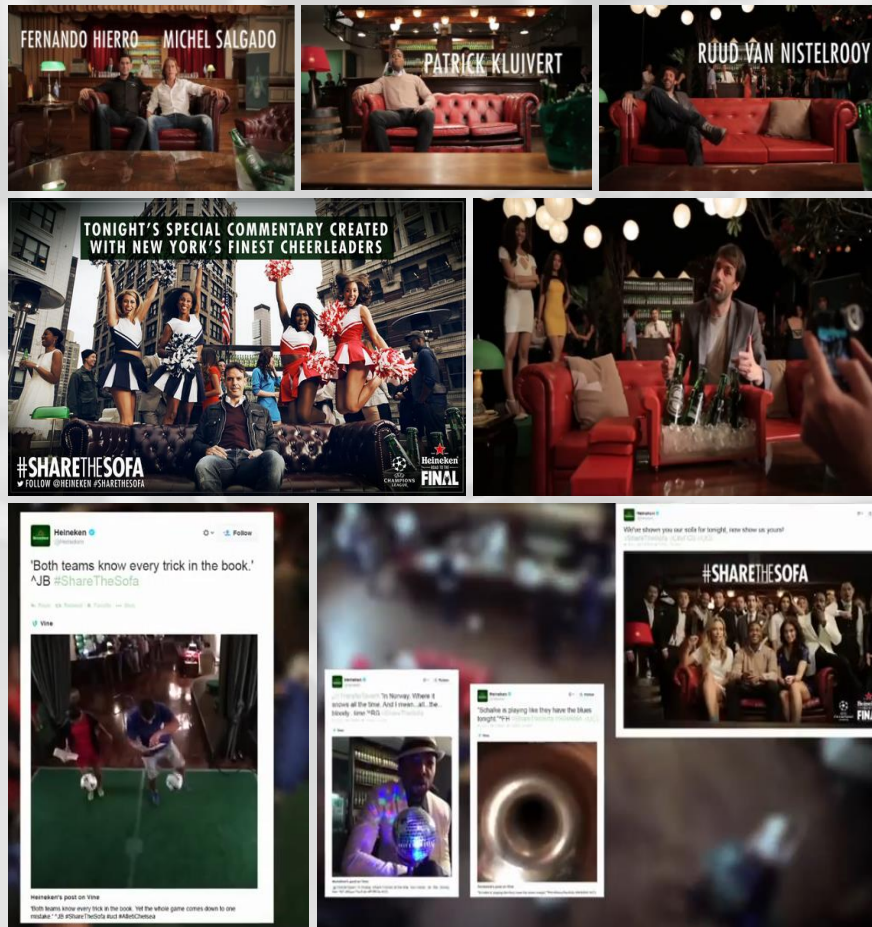
*Index value 100 = average

Base: Representative respondents who use the Internet at least once a month for information about sports

04

PRACTICAL EXAMPLES





HEINEKEN – #SHARETHESOFA

- » 2013/14 UEFA Champions League as an official sponsor of the competition, activated with the second screen campaign #ShareTheSofa.
- » During matches well-known former football stars such as Hernán Crespo, Fernando Morientes and Ruud van Nistelrooy answered questions from fans live via Twitter
- » Campaign was implemented in several locations and cities – even outside of Europe.
- » Pictures and videos were additionally used to give impressions of the game to all virtual spectators, without having the permission to show live images.
- » During half-time Heineken broadcast a live stream directly from the couch in which the stars answered more Twitter questions.
- » This campaign made the fans feel like following the game on their couch directly next to their idol.

SUCCESS FACTORS

1. The integration of testimonials puts the brand more into the background and gives fans the opportunity to get in direct contact with their football idols.

- Exclusive, interactive contents
- Direct contact with testimonials addresses several social and personal motives (attention, excitement, to express opinions publicly)

2. Use of hashtags and multipliers

- High reach and searchability
- Cross-channel virality

3. Use of multi-screen

- Addressing the changed media consumption with previous market research on the subject of multi-screen usage
- Increasing the added value for customers by using a strategic approach and planning each influence factor.

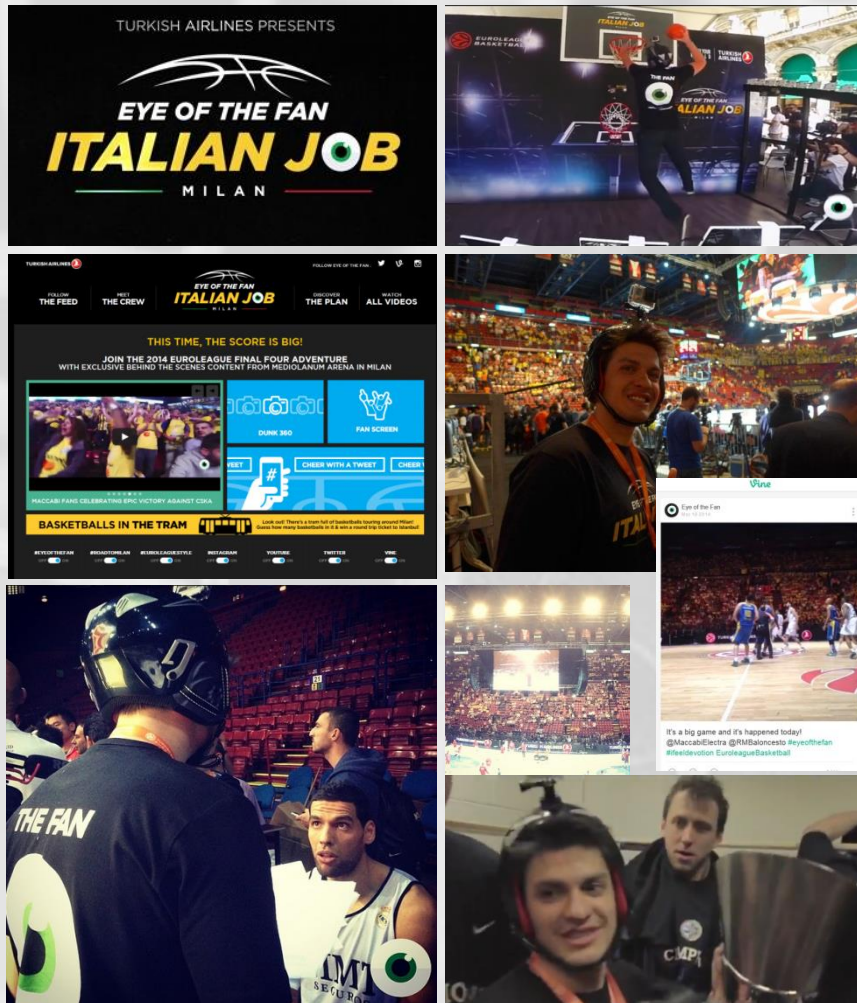
In total #ShareTheSofa achieved approx. 1.2 billion impressions

Reach of 13.4 million Twitter users per game

79% of all discussions in Social Media about the Champions League contained the hashtag #ShareTheSofa, and even 98% in Central America.

The purchase intention increased by 7%

Earned media in more than 94 countries



TURKISH AIRLINES – EYE OF THE FAN

- » Transport of fan experience on-site via digital channels
- » Connection of online and offline activities of fans
- » Selection of 4 fan reporters per finals team, which were equipped with helmet cameras and had exclusive insights to the teams, locker rooms, etc.
- » Videos were uploaded directly to Social-Media-profiles of Turkish Airlines on Twitter, Facebook, YouTube, Vine and Instagram,
- » Connecting all contents on theeyeofthefan.com
- » Further activations through #eyeofthefan with selected fan tweets during final 4 games to support teams on LED perimeter board and screens

SUCCESS FACTORS

1. Fan as central factor for digital activities and activations

- Exclusive behind the scenes content – made come alive by fan reporter through “eyes”
- Direct contact with athletes and teams addresses several social and personal motives (attention, excitement)
- Dunk 360 activation – fan experience with contest against other fans and pros and real-time sharing

Over 40.000 user generated content
2.200 Basketball fans took part in Dunk
360° - reach via social media about
900.000 people
Total social media reach of campaign:
7.303.989

2. Use of hashtags and athletes

- High reach and searchability
- Cross-channel virality

3. Use of hub based on ugc

- One central place for fans with all relevant info, multimedia, etc.
- Fans are inspired by other fans, get exclusive insights and can win at the same time



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**LET'S GET
CONNECTED**

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