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The 100m Club

THE GLOBAL REACH OF SPORTS LEAGUES ON SOCIAL'S BIG 4

The growth of global sports communities

Sport has always had the power to create communities and unite people through their passion and shared sense of identity.

Where these communities were once centred around the geographic location of the team, now, in the modern globalised world, sports properties command huge global interest which they can serve and engage with directly via social media.

Although there is a growing number of social media channels fighting for fans attention, the traditional "big 4" of Facebook, Twitter, Instagram, and YouTube are still very much the main players in sport and serve as the best gauge of a rights holder's digital reach and commercial potential.

In this report we look at the elite sports leagues that have broken the 100m mark in terms of their reach across these four key social channels and analyse both where the strength lies within these leagues and what it might mean for their future development.

Our report shows that the social audiences for properties in football, cricket, motorsport and the big US Sports have all gone beyond 100m, but have done so in different ways, with some dominated by a small number of elite franchises that, in their own right, are close to or above 100m in reach whereas others have a more equal spread of social power.

What does this balance of social strength mean for the commercial success of leagues and the teams that compete in them? How much are the current imbalances a natural product of globalisation and what could be the outcome if they continue to grow?

The 100m Club looks at these questions and more, providing a data driven overview of the growing strength of sports leagues on social's big 4.

The 100m Club

There are 11 sports leagues / federations that have a combined audience of more than 100M people on social media's big 4 - Facebook, Instagram, Twitter and YouTube - including the top five European Football Leagues, Top American Leagues, Brazilian Football, Formula 1 and IPL Cricket.

THE 100M CLUB		COMBINED BIG 4 AUDIENCE*
1	Premier League	683m
2	LaLiga	653m
3	NFL	268m
4	Serie A	205m
5	NBA	178m
6	Indian Premier League	173m
7	Bundesliga	156m
8	Brazilian Serie A	152m
9	MLB	149m
10	Ligue 1	134m
11	Formula 1	117m

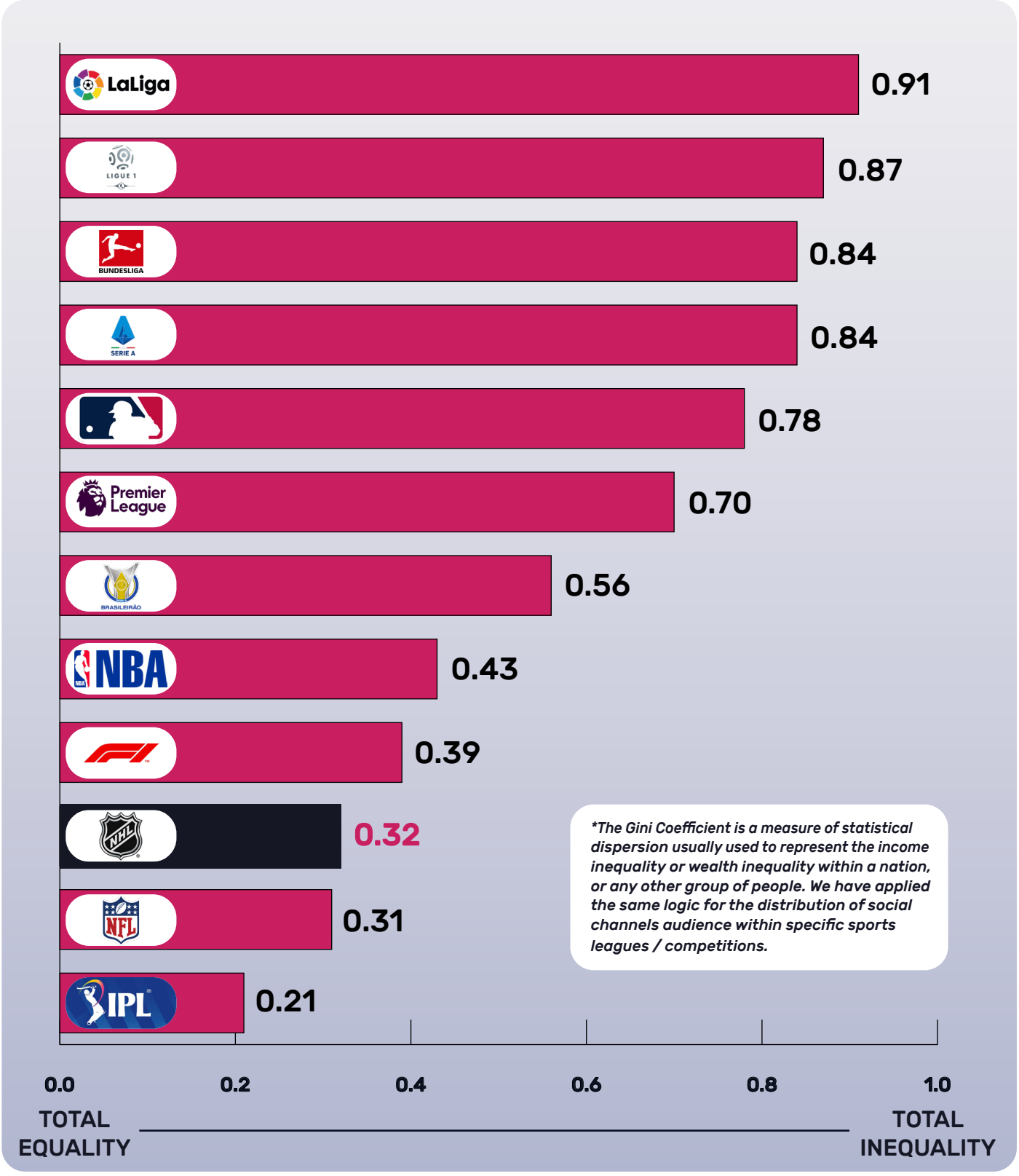
Data as of January 2021

...AND NEARLY THERE

12	NHL	93m

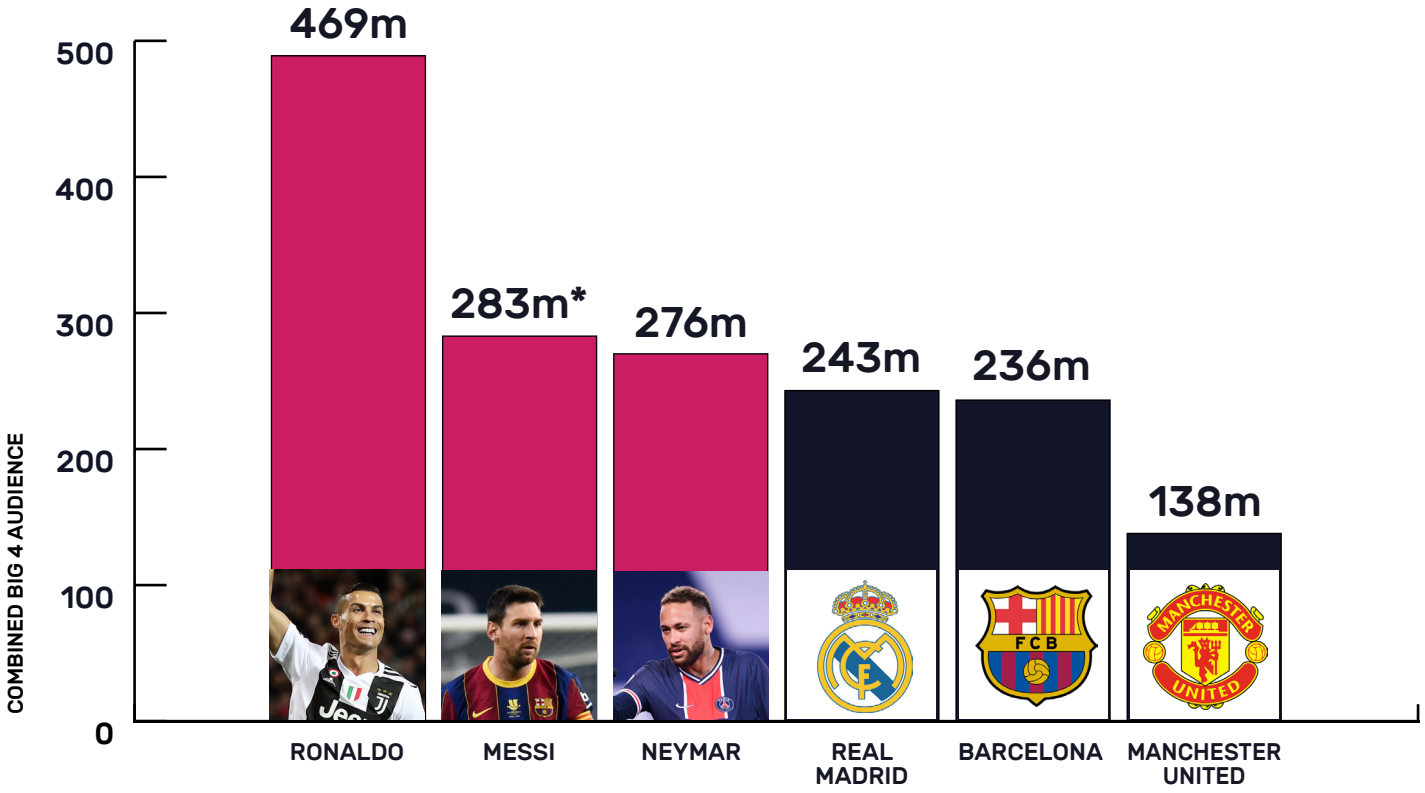
The distribution of social power

Using the Gini Coefficient*, we can see where the social power lies in each league. For the big European football leagues, inequality is the name of the game where a handful of teams in each league wield the bulk of the power. This is contrary to the American Leagues, The IPL and Formula 1 where the league and sport itself is as, or more important than, the individual franchises.

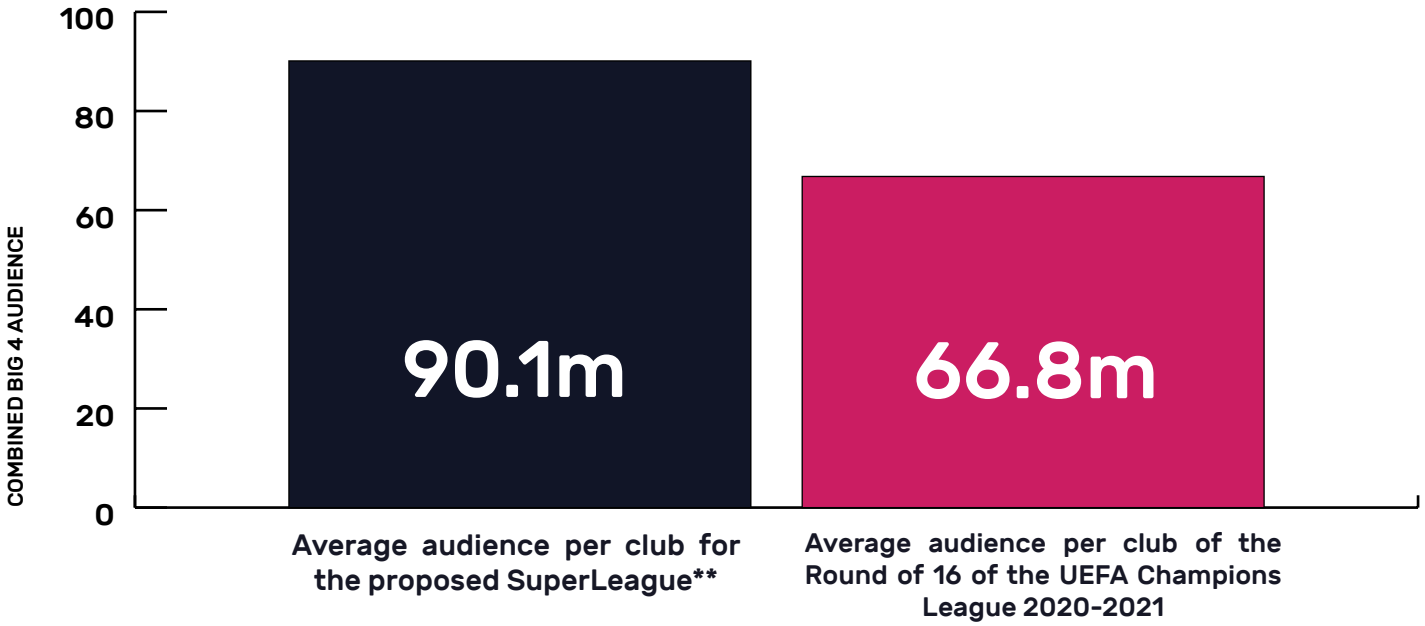


The strength of a selected few

Further proof of this inequality in the European football is the fact that there are properties and players in the leagues that, by themselves, have an audience of over 100m. This inequality may be behind the idea of creating an exclusive group for this selected few as has been suggested with calls for a European SuperLeague.



**Messi is not on Twitter*



***Assumes a 15 club SuperLeague with Manchester United, Manchester City, Arsenal, Liverpool, Chelsea, Tottenham, Barcelona, Real Madrid, Atletico Madrid, Inter, Juventus, AC Milan, Bayern Munich, Borussia Dortmund and PSG*

Globalisation driving imbalance and division

The 100m Club shows that there are 11 leagues / competitions that have a combined audience of 100M, with NHL just below on 93m.

To understand the levels of audience equality within each league, we used the Gini Co-efficient, a measure of statistical dispersion intended to represent the income inequality or wealth inequality within a nation or any other group of people.

This revealed that the internal balance in these leagues is fundamentally different. European football leagues' audiences are driven by a few massive properties and players; with more parity in the American leagues and other sports where the sport is more important than individual teams (e.g. Formula One).

Similar to economic inequality in the world, this type of inequality has been widening with globalization and the rise of social and digital channels.

Fueled by the reach that social media enables, big heritage properties like Real Madrid have increasingly become, global phenomena that go beyond national borders, widening the audience and commercial gap with other national counterparts.

This imbalance in European football leagues impacts the different commercial models where, in these leagues, smaller teams are very dependent on these key properties to drive their commercial revenues. For instance, in the Premier League a game with the top six can be worth 20x any other game on these social channels for these teams. However, in the US, it is a much more centralized commercial model where the collective power of the league drives more than the individuality of some franchises, despite the strength and dimension of a Los Angeles Lakers, Chicago Bulls, Dallas Cowboys or New York Yankees.

Unsurprisingly, it is also in the unbalanced landscape of European football, where the traditional commercial and sporting status quos are being more closely scrutinized. For instance, the increased collective audience that the reported group of elite European football teams would deliver - our analysis showed the increase could be as much as 20m - is one of the contributing factors driving discussions around the formation of a SuperLeague.

As this inequality continues to widen, it will be interesting to know which dynamic will prevail. The traditional, and perhaps more romantic view, where the selected few will help their own domestic league and continue to centralize rights, revenue share and contribute to the growth of the other teams. Or perhaps this new and more economically compelling one, where these elite clubs seek to maximize their own revenues and continue their own international expansion, which in turn will erode the relative importance of their domestic league.

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