



Module 2. Fan insights, market research, and audience measurement



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Unit 2.1 Fan-centric approach

Today, any company that aims to excel must place its customers at the center of all its actions. This idea is referred to as customer-centricity in English (Ramich, 2022, <https://shorturl.at/jopy9>), and it's achieved when everyone in the organization understands the situations, perceptions, and expectations of their customers.

In simpler terms, customer-centricity means that customers should be at the core of every decision involving the delivery of products, services, and experiences, leading to satisfaction, loyalty, and advocacy. If a company successfully applies this approach, it can create meaningful experiences and long-lasting relationships with customers, while one wrong move could result in losing many of them.

Here are some of today's best practices for customer-centricity:

- **Foster a customer-centered culture:** ensure everyone in the company, from the CEO to frontline workers, embraces the customer-first mindset.

- **Enhance data analysis:** data is often underutilized or misinterpreted. If the value of data isn't clear, people within the company won't know how to analyze and use it effectively. For example, using AI (artificial intelligence), data can be automatically integrated to resolve identities and uncover insights that enhance personalization and initiatives like next-best-offer.
- **Collect customer feedback:** it's crucial to genuinely listen to what customers want and need by gathering their feedback and using it to shape the business. While individual customers may not always be right, it's worth paying attention when many provide similar feedback, whether verbally or through their behavior.
- **Focus on long-term relationships:** building long-term connections with customers is more valuable than chasing a one-time sale. Customers should feel valued beyond just being a number, with personalized contact, offers, and an understanding of their preferences, leading to loyalty and retention.

In the sports industry, this customer-centric approach is even more vital. Why? Because in sports, customers are **fans**, and being a fan of a club, team, or franchise involves much more than a transactional relationship with a brand. Being a fan creates a deeper emotional connection, so in sports, it's more fitting to talk about a **fan-centric approach** instead of customer-centricity.

For global sports organizations like FC Barcelona, engaging with fans worldwide, not just locally, and making them feel close to the club is the foundation of the brand and digital strategy. This strategy is built around the idea that fans should be at the center (fan-centric approach), starting with club members, continuing with visitors to the Club's facilities, and extending to fans across the globe. The goal is to focus on them, offer what appeals to them, and ultimately monetize this relationship. This is the core mission of the brand and digital teams.

As we'll see in the next section, FC Barcelona has hundreds of millions of fans around the world, including over 440 million followers on social media, a massive global television audience, and more than 62 million yearly visits to its website.

According to Guillem Graell, FC Barcelona's Brand Director from 2018 to 2021, the club's global brand strength was built on "the alignment of sporting success with the rise of digital expansion. The evolution began with traditional channels and networks filling the gaps between matches with fan-centric content that also added value for sponsors. However, it reached a point where intermediaries, with the exception of YouTube (which shares revenue), required payment to showcase content. This led the Club to reconsider its strategy: continue using these platforms to reach fans, but also connect with them directly through unique content and services only the Club could provide" (FC Barcelona, 2020, <https://shorturl.at/cdjsS>).

This shift led to new products like CULERS Premium Membership and Barça TV+, catering to a core group of fans eager for exclusive content.

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Unit 2.2 The Fan Funnel

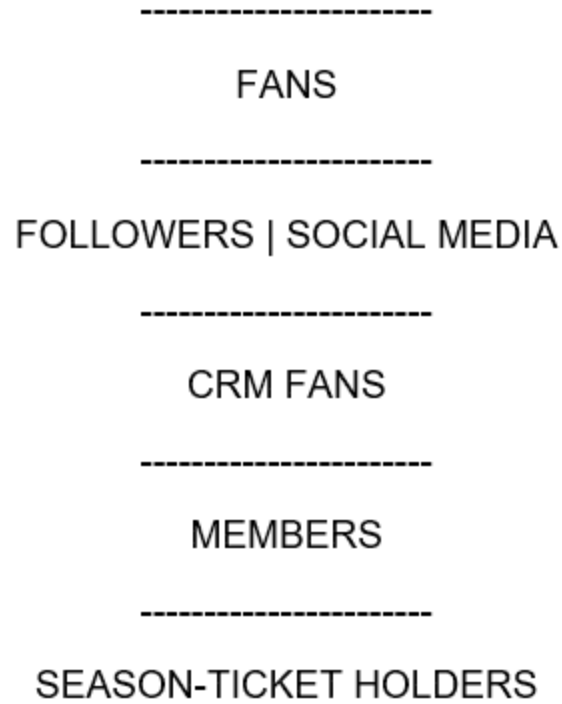
As mentioned earlier, there are different layers when it comes to a club's followers — from casual fans who declare their support for the club or follow it on social media to the most loyal core, such as members and season-ticket holders. These different levels form what is known as the "fan funnel," and the goal is to collect as much information as possible about each group to offer tailored value propositions.

Figure 1. *The Fan Funnel*

FAN FUNNEL



FAN FUNNEL



- ENGAGEMENT LEVEL: + (texto vertical a la izquierda)

Source: Original work

Let's break down each level to better define each segment, identify data sources, and outline the key information we're looking for.

2.2.1. Fans

Fans - Definition

A football club's fans are those who identify as followers of the club, either as their primary team or as a secondary one. Why include secondary followers? Because in football-centric countries like Argentina or Brazil, many people primarily support their local teams, but also follow European clubs with great enthusiasm. Take this example: a Boca Juniors fan in Argentina might primarily support their local team, but also follow FC Barcelona, either because they've always liked the Club, because Messi was part of the club, or for other personal reasons.

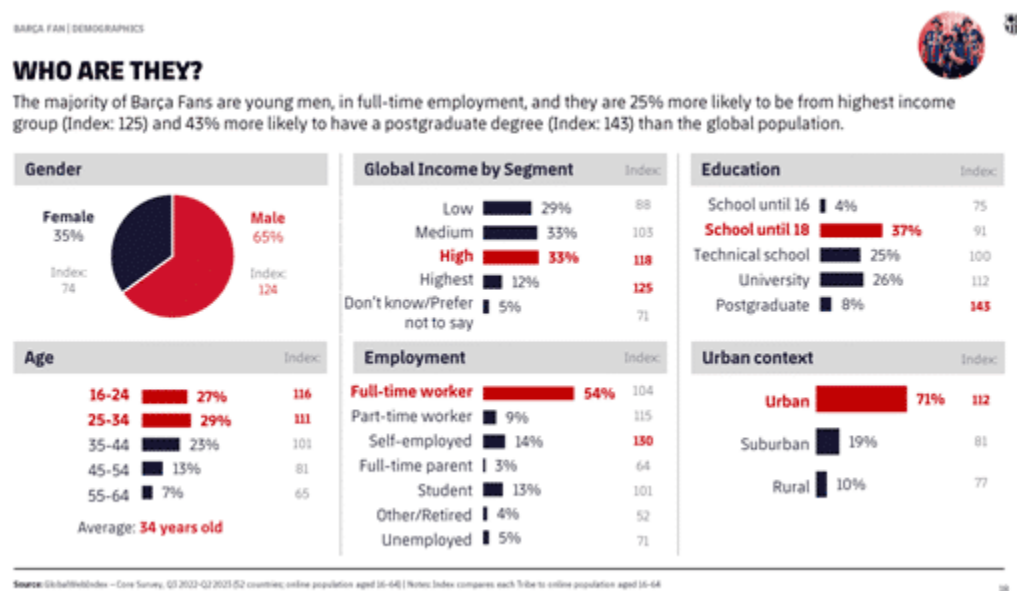
Fans - Sources

Several platforms estimate the number of fans for major sports organizations, including Nielsen, YouGov, and GlobalWebIndex. At FC Barcelona, the business intelligence team uses GlobalWebIndex (GWI), which they believe provides the most accurate and reliable data. GWI is a market research company that collects vast amounts of data from internet users aged 16 to 64 across more than 50 countries worldwide. Among its data sets, GWI tracks which teams' individuals support, along with demographic information, interests, consumer habits, digital behaviors, and more.

Fans - Key Information

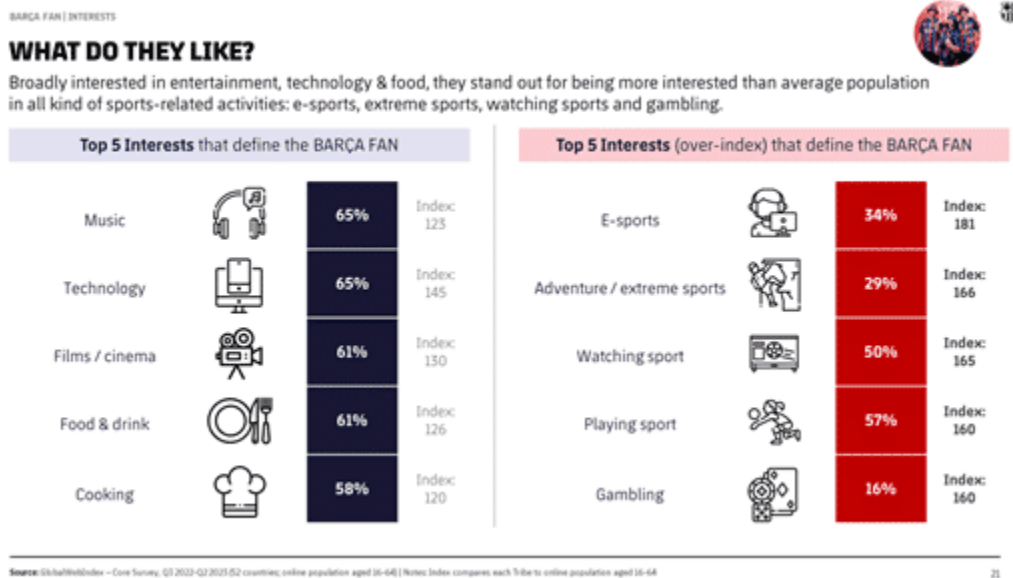
Aside from tracking the number of fans — with a split by region — and comparing it with our main competitors, we also look at the following of the competitions the Club plays in (LaLiga, Champions League, Copa del Rey, etc.). It's also valuable to identify which other teams and sports our fans follow, allowing us to plan cross-selling campaigns with the most relevant interests. Finally, extracting demographic data from GWI about our fans' attitudes, interests, consumer habits, favorite brands, and digital behaviors is crucial. Let's look at a few examples.

Figure 2. GWI: Who are they?



Source: screenshot from GlobalWebIndex – Core Q3 2022-Q2 2023 ([GWI.com](https://www.gwi.com)).

Figure 3. GWI: What do they like?



Source: screenshot from GlobalWebIndex – Core Q3 2022-Q2 2023 ([GWI.com](https://www.gwi.com)).

2.2.2. Social media followers

Social media followers – Definition

In this case, the definition does not allow for any nuance or interpretation, unlike with fans, where measurement and quantification can be more complex. A club's community of followers consists of all individuals who follow any of the club's social media profiles. The major platforms currently include Instagram, Facebook, X

(formerly Twitter), TikTok, YouTube, Twitch, and Chinese social media (Douyin and Sina Weibo).

Social media followers - Sources

Beyond monitoring our own followers, we also need to compare ourselves with competitors. External platforms are essential for this benchmarking process. Today, the most popular tools in this area are Blinkfire and Hookit. For FC Barcelona, we work with both, and the first company has an agreement with LaLiga to provide services to all Spanish clubs.

Social media followers – Key Information

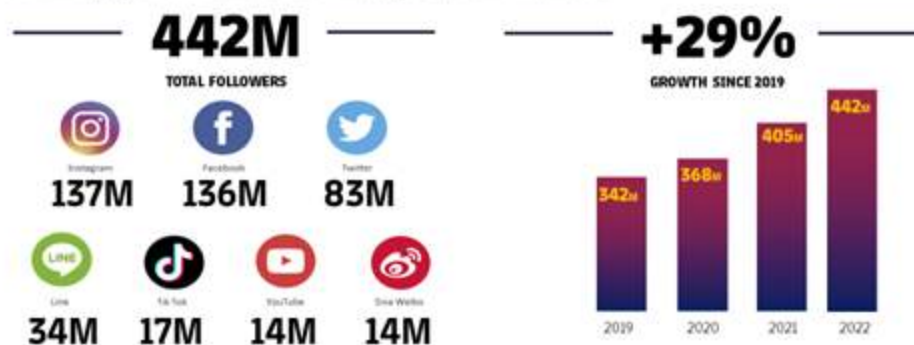
Apart from knowing the number of social media followers for both our club and our competitors, there are other essential metrics we need to monitor. Metrics such as engagement —total and per post—, video views, and media value are crucial, as they directly affect our sponsors.

Moreover, in terms of our followers, both Blinkfire and Hookit offer insights into key demographic information, such as gender, age, and location, across the major social platforms.

Figure 4. Social media presence

BARÇA HAS A STAGGERING SOCIAL MEDIA PRESENCE

In total, Barça currently has almost 442 million followers across all social media platforms, counting all the Club's accounts in different languages and for its different teams – the largest digital community in sports.



Source: FC Barcelona (data from the club's official social networks).

Figure 5. Followers

INSTAGRAM GATHERS A GEOGRAPHICALLY WIDESPREAD AUDIENCE

Barça connects with an extraordinary intercontinental community of millions of fans through Instagram, making it the leading social network for the club.



Source: Screenshot from Blinkfire Analytics (blinkfire.com/landing).

2.2.3. CRM fans

CRM fans – Definition

CRM fans are individuals whose basic information, such as name, surname, and email, is recorded by the club. In other words, they are the leads generated from various touchpoints the club interacts with, such as the online store for merchandising, ticket website, museum, or OTT content service. CRM fans fall into the second level of the fan funnel, as they allow the club to reach them through newsletters.

CRM fans – Sources

The number of CRM fans is gathered internally by the club, which stores the leads in its CRM system. Thus, having the right CRM software is vital, as it helps manage, organize, and segment these leads for targeted campaigns.

CRM fans – Key Information

The primary data collected for CRM fans includes demographics like age, gender, and country of origin. It's also helpful to categorize fans based on the touchpoint through which they connected with the club. Last, there are three levels of consent that fans can opt into for receiving communications from the club:

1. General club newsletter.
2. Surveys, event invitations, and product campaigns.
3. Foundation and partner-related content.

Fans are free to select one, two, or all three levels. The third option is especially valuable for sponsors, as it enables them to directly engage with the club's fan base.

2.2-4. Members and season ticket holders

Members and season ticket holders – Definition

Members are undoubtedly the most devoted and central supporters of any club. They are the most loyal and passionate, maintaining a deep connection with the organization. Members pay an annual fee in exchange for various rights, services, advantages, and benefits from the club. Moreover, at clubs like FC Barcelona or Real Madrid, with their unique ownership model, members are the actual owners of the club. They participate in the most important club decisions, such as voting in member assemblies and electing the club's president and board of directors.

Members who are also season ticket holders are the most dedicated, as they hold the right to a seat in the stadium for all home games. Season tickets are a right they retain unless they misuse or forfeit them in an improper way. At FC Barcelona, there are currently tens of thousands of members on the waiting list for season tickets.

Members and season ticket holders – Sources

The club itself is the source for the data on members and season ticket holders. The database for members and season ticket holders is far more comprehensive than that for CRM fans, as it contains additional information. Beyond basic information like names, email addresses, and demographics (age, gender, detailed location), it also includes details like contact numbers, membership IDs, seniority, and seat location (for season ticket holders).

Members and season ticket holders – Key Information

Members and season ticket holders are essential to the club's operations. It is crucial to understand their preferences, concerns, and needs, as they play a central role in the club's decision-making. Therefore, the club conducts regular market studies to gather more insights beyond the basic information in the database. While market research is also performed on CRM fans, it is less frequent compared to that done for members and season ticket holders. The following

section will explore market research in more detail, but here's a brief overview of some of the information collected from these studies:

- Member satisfaction with the club's operations and board leadership.
- Perceptions of the advantages and benefits of membership.
- Evaluation of club services and communication channels.
- Member behavior, including stadium travel, store purchases, match attendance, and season ticket usage.
- Opinions on current issues relevant to the club.

Another significant audience we focus on is the **TV viewership** for the club's matches. This audience is critical because it helps gauge the club's overall reach and the exposure our sponsors will achieve. While not included in the fan funnel, TV audiences are still important, as they may include neutral football fans or even rival supporters watching the game.

We'll dive deeper into TV audiences in a later chapter, but for now, it's worth noting that our main source for this data is Nielsen, the global leader in audience measurement. In addition to raw audience numbers, here are a few other key metrics to monitor:

- Match audiences by competition: domestic league, European tournaments, other cups like the Copa del Rey or Super Cup for FC Barcelona, friendlies, and summer tours.
- Match audiences by region: tracking viewership numbers by territory (Europe, MEA, Americas, APAC).

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Unit 2.3 Market Research

To meet the club's various needs for information, we rely heavily on market research, or market studies. Market research allows us to assess our brand's health, position ourselves commercially against competitors, understand the impact of our partnerships, and gain critical insights into key fan segments, such as members. In this regard, the FC Barcelona business intelligence team has classified the market research we manage within the club into two categories: more strategic market research and another type of more tactical studies.

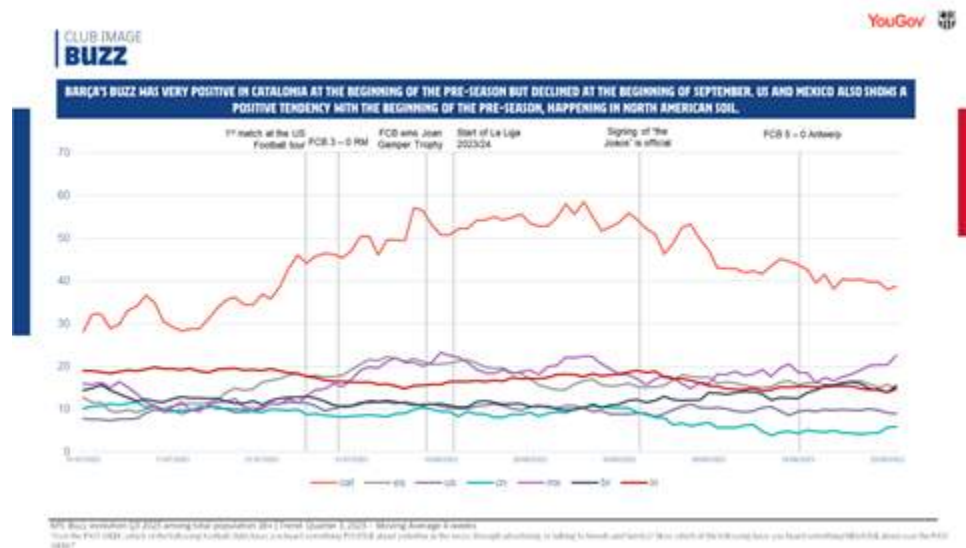
2.3.1. Strategic Market Research

This section covers ongoing tracking studies managed by the club, using several platforms we'll discuss below. The primary tracking studies currently in use include the following:

Brand Health

For FC Barcelona, it's crucial to monitor key brand KPIs consistently across important markets. These KPIs include awareness, following, likeability, and conversion. Other significant factors measured include buzz and image attributes like perceptions of the club's management, its players and coaches, fan culture, tradition, style of play, and sporting success.

Figure 6. Buzz



We use YouGov, an international market research and online data analysis firm, for our tracking studies. Their FootballIndex tool gathers daily global data on the leading football clubs and other sports entities.

Partner Awareness Tracking

Another key strategic study within the business intelligence team focuses on measuring the impact of our club's partners on our fans. Conducted biannually, this study surveys fans with key questions about the club's sponsors, such as:

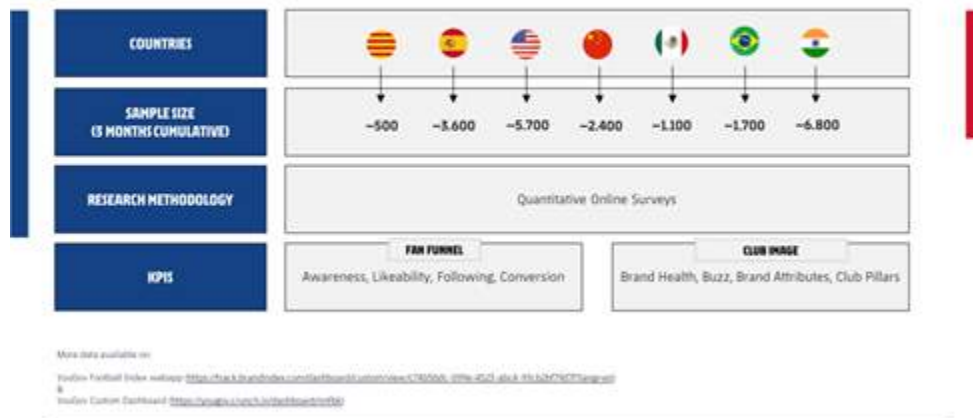
- Levels of spontaneous and aided awareness of club partners.
- Changes in brand awareness before and after partnering with the club.
- Direct effects on sales or purchase intentions of partner products and services.
- General fan sentiment about sponsorship agreements: Is the partnership viewed positively by fans? Does it benefit the club? Is the partner aligned with the club's values?
- New fan-suggested activations that could enhance the club-partner relationship.

This data is invaluable, especially for the business development (sponsorship sales) and activation teams, as it strengthens sales pitches to prospects and helps renew existing partnerships.

Figure 7. Brand Health Monitor

BRAND HEALTH MONITOR METHODOLOGY

YouGov



Source: Screenshot from YouGov (<https://shorturl.at/yPTV9>).

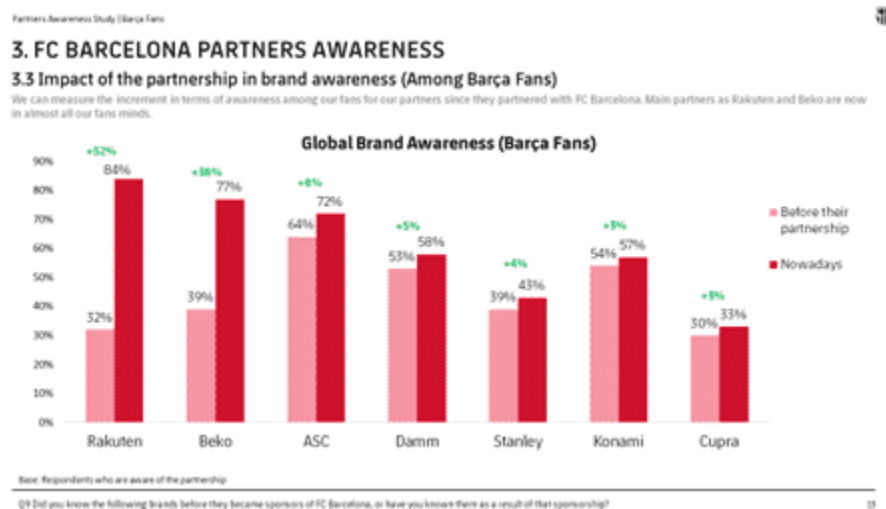
Member Observatory

As we mentioned earlier, members and season ticket holders are a vital part of the club, and their opinions on key issues must be regularly collected, updated, and monitored. Most of this data is gathered through the "Member Observatory," an extensive annual study that covers the following sections:

- Evaluation of club operations and board leadership.
- Perceptions of the advantages and benefits of membership.
- Evaluation of club services and communication channels.

- Member behavior, including stadium travel, store purchases, match attendance, and season ticket usage.
- Current issues, meaning members' opinions on specific relevant topics.
- Member profiling, including demographics, sports played, favorite brands, hobbies, and media consumption.

Figure 8. Partners awareness

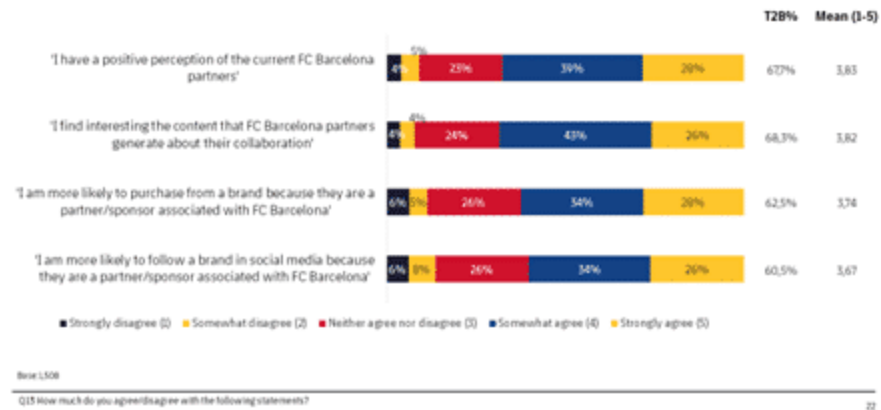


Source: screenshot from the internal CRM records survey “Partners Awareness” (FC Barcelona-Qualtrics).

Figure 9. Fan opinions about partners

10. BARÇA FANS OPINIONS ABOUT PARTNERS

Although there are some haters, most of our fans have a positive perception about our partners, find interesting their content and are more likely to follow and to purchase products of the FC Barcelona partners



Source: screenshot from the internal CRM records survey "Partners Awareness" (FC Barcelona-Qualtrics).

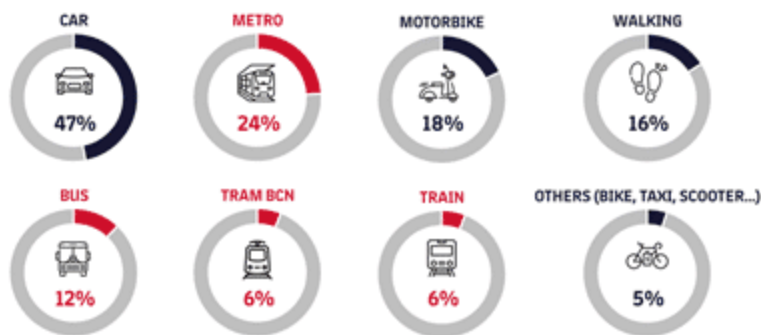
Figure 10. How they get to the stadium

BARÇA MEMBERS | METHOD OF TRANSPORTATION TO GET TO BARÇA FACILITIES



HOW DO THEY GET TO THE CLUB'S STADIUM AND FACILITIES?

The car is the most common means of transport used by Barça members to get to the club's facilities (47%), although if we group together the public transport options (those in red), these also reach 48%. Other quite widespread options are the motorcycle, the most common method for 18%, or walking (16%).



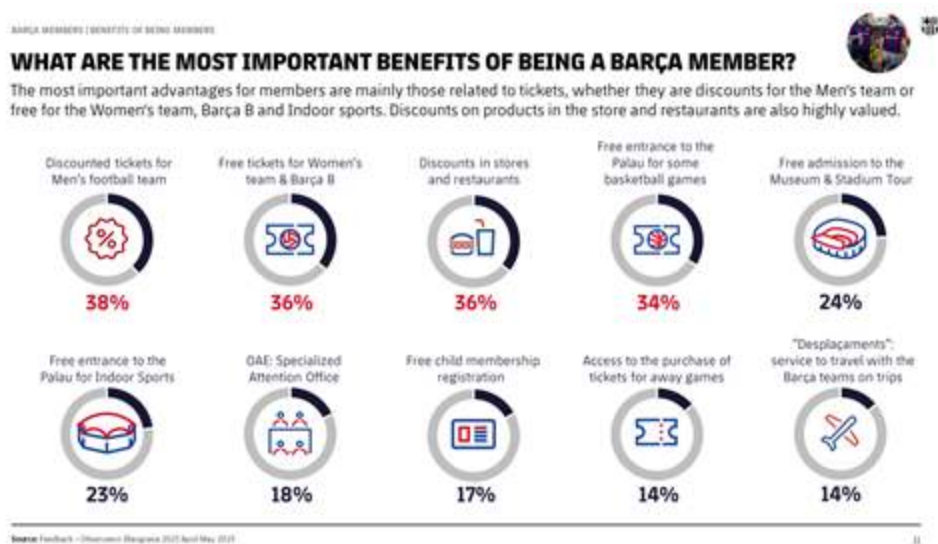
Source: Feedback - Observatori Blaugrana 2023 April-May 2023

Source: screenshot from the study "Blaugrana Observatory 2023" (FC Barcelona-Feedback).

2.3-2. Tactical market research.

Tactical market research refers to studies launched in response to specific demands or needs from various departments of the club. Typically, these studies are more localized or national in scope, require prompt results presentation, and aim to provide key information for immediate decision-making.

Figure 11. Benefits of being a member



Source: screenshot from the study "Blaugrana Observatory 2023" (FC Barcelona-Feedback).

Within this type of tactical market research, there are different levels. For instance, conducting a study to identify drivers and barriers in your facilities is different from launching a simple survey to gather

feedback on a specific campaign, a members' assembly, or even employee satisfaction.

The former includes tactical studies with a high level of complexity that may require third-party involvement (specialized market research institutes) and a significant volume of data to analyze. Below, we provide a couple of examples in this context.

Figure 12. First type of study.

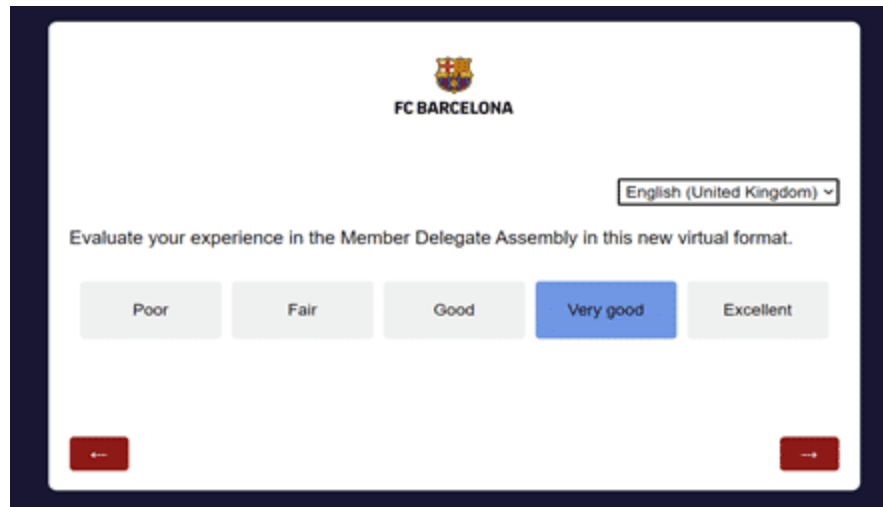


Source: screenshot from the study "Attendance at the Olympic Stadium of Montjuïc" (FC Barcelona-GAPS).

The second type of studies generally consists of short surveys (max 5 minutes) sent exclusively to the club's internal databases, managed by the business intelligence team. These simple questionnaires are launched via fully online platforms such as Qualtrics or Microsoft

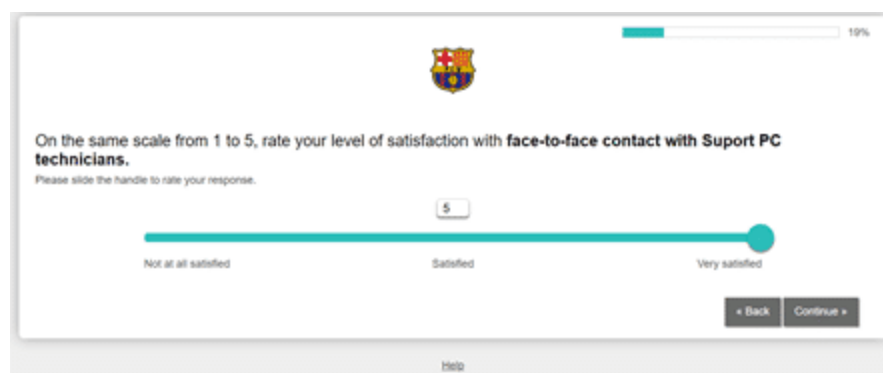
Forms, which allow for real-time result visualization and rapid sharing of auto-generated reports.

Figure 13. Second type of study.



Source: screenshot from the internal survey of members "2023 Ordinary Assembly" (FC Barcelona-Qualtrics).

Figure 14. Survey



Source: screenshot from the internal employee survey "PC Support Satisfaction" (FC Barcelona-Qualtrics).

These surveys, as mentioned, can only be launched to the club's internal databases, such as CRM fans, members, employees, product customers, or event attendees. As a result, they are very useful for evaluating the performance of a specific area of the club, examining new products, assessing satisfaction with events, campaigns, and activities, and asking members quick questions.

Figure 15. Stadium study



Source: screenshot from the study "Johan Cruyff Stadium" (FC Barcelona-Salvetti).

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Unit 2.4 Audience measurement

What are audiences?

The best way to introduce this section of the course is to define audiences as "the number of individuals who receive messages through a communication medium and sometimes interact with them. Audiences are typically divided based on variables such as age or gender" (Marketing Directo, n.d., <https://shorturl.at/ejkAQ>).

In this section, we will focus more specifically on television audiences and how they impact FC Barcelona.

Types of audiences

After defining audiences, we can focus on their different types. Not all types are mutually exclusive; they can be complementary.

- **Potential audience:** this includes the total number of individuals who could potentially be reached at a given moment. Therefore,

they are individuals likely to watch a television broadcast at that time.

- **Actual audience:** these are the unique individuals who are viewing a television program during its broadcast.

After reviewing these two definitions, we will provide an example to illustrate the distinction between the two audience types. The Copa del Rey semifinal between Real Madrid and FC Barcelona on March 3, 2023, was viewed by 6 million spectators in Spain, generating a 36.3% share of the television audience (Real Madrid vs. FC Barcelona) on TVE (Spain's public broadcaster). According to the INE, as of January 1st, 2023, Spain has a population of 48 million people. Given this data, and assuming all these individuals have access to a television, we can define the potential audience as 48 million and the actual audience as 6 million.

Another way to differentiate audience types is as follows.

- **Primary audience:** this includes all audiences captured from the primary broadcast of FC Barcelona matches. Within this type, we gather total viewing data from various broadcasters with rights in different regions around the world. For example, in Spain, this would encompass the entire audience captured by Movistar during the match broadcast.

- **Secondary audience:** this type captures all audiences from broadcasts that occur before and after the matches. For instance, the audience generated by highlight shows following the match falls under this category.

The last aspect, focused on primary audiences, allows for further sub-differentiation among several audiences, as follows.

- **Captured audience:** this refers to all individuals watching FC Barcelona matches from their homes. To determine the number of viewers, a meter is used, where individuals in the household indicate how many people are watching, categorized by age and gender.
- **Uncaptured audience:** this type consists of audiences that must be estimated, as specific data cannot be obtained. This category includes the following.
 - **Out-of-home audiences:** these are captured through HORECA channels (hotels, restaurants, and cafes).
 - **Streaming:** OTTs that do not audit or provide audience data.
 - **Piracy:** individuals using unofficial means to watch match broadcasts.

Audience measurement

The audience data that FC Barcelona obtains is provided by Nielsen Sports. Therefore, this section will focus on the methodology Nielsen Sports uses to establish audience values.

Figure 16. Audience calculation



Source: screenshot from Nielsen Sports (<https://shorturl.at/MPU49>).

Nielsen Sports' methodology involves obtaining audience data in all countries with an official auditor. They also employ an estimation model for countries without auditing.

Figure 17. Global coverage

Nielsen Sports is the largest subscriber to sports ratings and provides the best global coverage to support the FCBarcelona global audience requirements.



Source: screenshot from Nielsen Sports (<https://shorturl.at/MPU49>).

As mentioned previously, only certain countries have an official audience auditor. Globally, there are a total of 50 countries in this category. In Spain, the audience auditor is Kantar Media. This is the list of countries.

Figure 18. List of countries

Nielsen Sports have extensive access to audiences globally, with 50 markets available through in-house subscriptions.

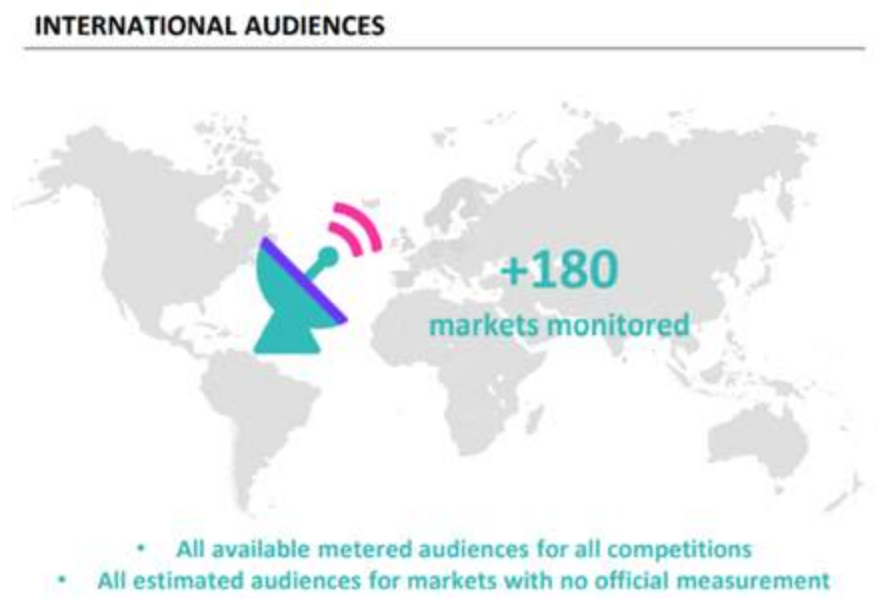
Markets				
Argentina	Cyprus	Indonesia	Philippines	Spain
Australia	Czech Republic	Ireland	Poland	Sweden
Austria	Denmark	Italy	Portugal	Switzerland
Belgium	Dominican Republic	Japan	Puerto Rico	Taiwan
Brazil	Finland	Malaysia	Romania	Thailand
Bulgaria	France	Mexico	Russia	Turkey
Canada	Germany	Netherlands	Serbia	UK
Chile	Greece	New Zealand	Slovenia	Ukraine
Columbia	Hungary	Norway	South Africa	USA
Croatia	India	Peru	South Korea	Vietnam



Source: screenshot from Nielsen Sports (<https://shorturl.at/MPU49>).

There are essential variables for audience measurement, such as match time, teams competing, and the competition itself, which are important for interpreting the final data. The following image provides additional key examples to understand these points.

Figure 19. International audiences



Source: screenshot from Nielsen Sports (<https://shorturl.at/MPU49>).

All these factors considered by Nielsen Sports contribute to obtaining final audience data across all countries that hold broadcasting rights for the various competitions in which FC Barcelona participates.

Once the analysis is completed and all data is gathered, we can access the audience figures for all matches played by FC Barcelona throughout the season. These figures can be detailed to the extent of knowing the audience numbers for each match in every country and for each broadcaster.

[CONTINUE](#)

activities

Customer-centricity means placing the customer at the center of all decisions related to...

the delivery of products, services, and experiences.

Identify the components of the fan funnel:

- Fans and social media followers
- CRM fans
- Members and season ticket holders
- Fans of other teams

SUBMIT

When we refer to studies carried out in response to specific demands or needs from various areas of the club, we are discussing:

- Tactical market research
- Strategic business research.

SUBMIT

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