TV AUDIENCE DYNAMICS FOR THE UEFA EURO FINALS: AN EMPIRICAL ANALYSIS OF 2020 AND 2024 PEOPLE-METRIC DATA

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ABSTRACT
Over the last decade, we have witnessed significant changes in TV content consumption, particularly during major sporting events such as the European Football Championships. EURO 2020 and EURO 2024 represent two distinct media and social realities, shaped by the global pandemic and accelerated digitalization. TV audiences provide valuable insights into the dynamics of viewing behavior and media consumption. In Bulgaria, Channel 1 (BNT 1), as the official rights holder for the EURO 2020 and EURO 2024 broadcasts, provides a representative basis for people-metric analysis. This study aimed to conduct a comparative analysis of the television viewing figures for UEFA EURO 2020 and UEFA EURO 2024, identifying common trends and significant differences in viewing behavior.
The primary metrics analyzed are Rtg% (the percentage of a given target audience reached), Rtg'000 (the absolute number of people, expressed in thousands), and share% (the relative consumption of a given TV program among all those currently watching TV).
The comparative People-Metric analysis by show (programming grid) of the leading TV content providers for EURO 2020 and EURO 2024, based on individuals in the target groups age 4+ and age 25-54, reveals differences in TV viewership between the finals of the two tournaments. The results are relevant to the media strategies of broadcasters, advertisers, and sports event organizers in a changing communication environment.

Keywords: *football, European Championship, spectators' interest*

INTRODUCTION

Over the past decade, we have witnessed significant changes in television content consumption, especially during major sporting events such as the European Football Championships. EURO 2020 and EURO 2024 represent two different media and social realities, influenced by the global pandemic and accelerated digitalization.

EURO 2020, initially scheduled for the summer of 2020, was postponed by a year and held between June and July 2021 amid the ongoing COVID-19 pandemic. It was the first European Football Championship to take place across 11 countries, presenting significant challenges for public health, logistics, and risk management. Moreover, it was the most digitally engaged European Championship in history, with 7.5 billion interactions and views on social media. A single social media post generated 59 million video views on the official sponsor platform TikTok (UEFA, 2021).

Hosting a large-scale sporting event during a global health crisis required implementing a complex risk assessment. The WHO recommends an approach based on risk management and assessment (Figure 1).

Figure 1. *Risk assessment during EURO2020 (Schmidt et al, 2024, adapted from the World Health Organization's mass gathering coronavirus disease 2019 (COVID-19) risk assessment tool for sports events)*

EURO 2020 proved that through strategic planning, inter-institutional cooperation, and the implementation of a risk-based approach, it is possible to successfully organize a mass sporting event even in the context of a global health crisis (Schmidt et al., 2024).

EURO 2024 has become a marketing product that generated millions of stadium attendees, a billion-strong viewing audience, colossal sponsorship and advertising deals, unprecedented digital presence on social platforms, and significant direct media coverage.

EURO 2024 showcased inter-institutional cooperation in line with shared values and a shared vision for the future. The partnership between the World Tourism Organization (UNWTO) and the Union of European Football Associations (UEFA) is an example of joint promotion of the benefits of football and sports tourism. In the forecast report on the development of the tourism industry up to 2028, Germany's hosting of the tournament appears in the SWOT analysis as a strategic opportunity for growth. UEFA EURO 2024 is expected to stimulate inbound tourism and raise awareness of the market brand.

UEFA's policy was to turn the tournament into a model of sustainability, and the report on environmental, social, and governance dimensions proved that this is entirely achievable. The results achieved in the area of public policy include the introduction of a sustainable public procurement procedure, the maintenance and protection of human rights, the organization of discussion forums, and engagement with sponsors in sustainability-related activities.

Constantinescu (2024) analyzes the economic, social, and cultural impact of EURO 2024. The study focuses on revenues from the European Football Championships (Figure 2).

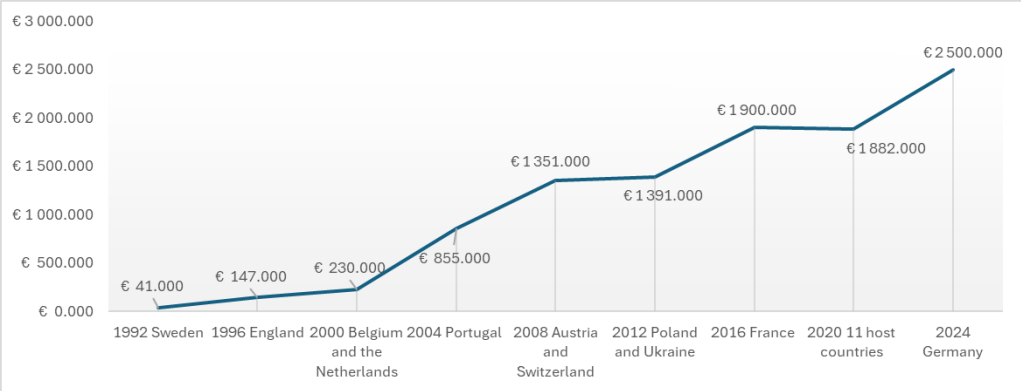

Figure 2. *Revenues from European Football Championships (Constantinescu, 2024)*

Over the years, the European Football Championships have become a powerful multimedia and marketing product. We can see that revenues have increased by more than 60 times over the past three decades. The data clearly indicate a significant rise in interest in the tournament, expanded media coverage and global broadcasting, growing television broadcasting rights, and increased revenues from sponsors, ticket sales, and commercial activities. Television rights represent the most significant share of revenue sources for the tournaments.

Aim And Objectives

The aim of this study was to conduct a comparative analysis of people metrics for TV viewership of UEFA EURO 2020 and UEFA EURO across media that acquired the broadcasting rights.

To fulfill the aim, we solved the following scientific research tasks:

1. Research and analysis of specialized sources about media coverage of mega sporting events and the economic value of the European Football Championships.
2. Research and analysis of people metric data related to programs (program guide) of major TV content providers for the EURO 2020 and EURO 2024.
3. Research on the trends in viewers' behavior of the two sporting events.

The research focused on people metrics for the two football tournaments.

METHODOLOGY

To carry out the overall research, a toolkit was used that included the following scientific research methods:

1. *Content Analysis* – exploration and theoretical analysis of specialized literary sources, including:

Scientific literature related to the accelerated digital invasion and new communication models in the football industry.

2. *Case Study* – this method covers media corporations that acquired broadcasting rights for the championships, such as the Bulgarian National Television and Nova Broadcasting Group.

The primary metrics analyzed were: Rtg% (the percentage of a given target audience that was reached), Rtg'000 (the absolute number of people reached, expressed in thousands), and Share% (the relative consumption of a given television program compared to the total number of viewers watching TV at that moment).

RESULTS

The European Championship is the most prestigious competition for the national teams of the European continent, held every four years. The analysis of EURO 2024 shows a significant economic, media, and social impact (Figure 3).

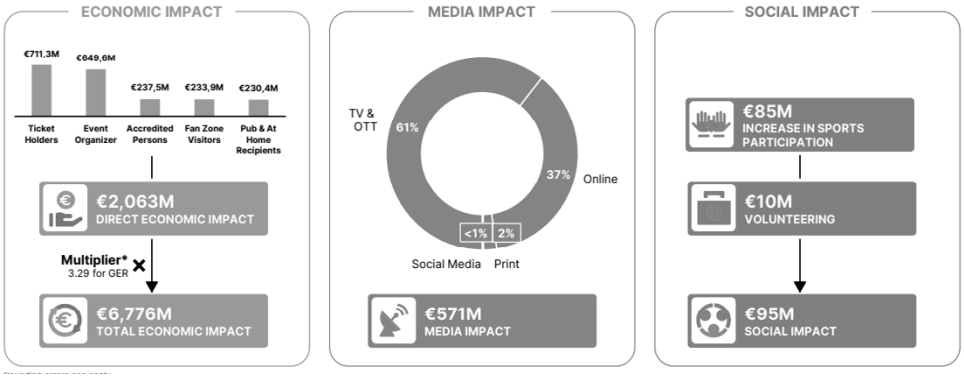

Figure 3. *Economic, media, and social impact of UEFA 2024 (Nielsen Report, 2024)*

Regarding the influence of media, TV viewers had the largest share (61%), followed by fans consuming online content (37%). The ten host cities of the tournament were visible for over 1,150 hours in the global live broadcast. The revenue generated from commercials, combined through the live broadcasting of the events, was 571 million euros.

Cumulatively, the TV viewership for EURO 2024 is 5,429,000. The data analysis reveals that Germany, China, and the UK are the countries that dominate in this regard (Figure 4). The second position – China – shows the global influence of UEFA EURO and the popularity of European football in Asia. The Asian markets (China, Indonesia, and the Near East) have extreme importance for UEFA's global strategy.

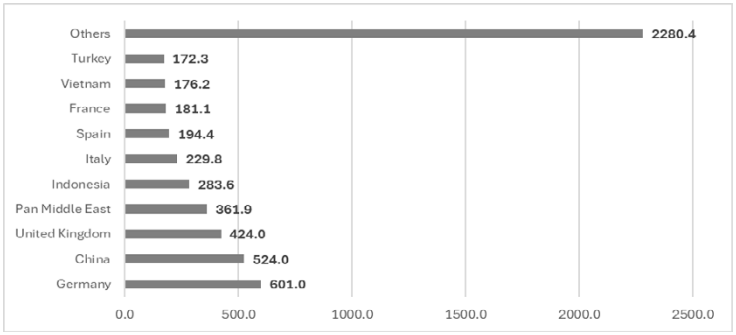

Figure 4. *TV viewers of the EURO 2024 by country*

During the investigation, it was established that on January 15, 2018, a tender was announced for the acquisition of media rights for broadcasting UEFA EURO 2020 matches, the national football team's matches, and the Nations League on the territory of Bulgaria. The tender was organized by CAA11, UEFA's marketing agency, which manages the television rights for national football teams and related UEFA competitions. BNT acquired the exclusive media rights for all three tournaments. For EURO 2024, the broadcasting rights are jointly held by BNT and Nova Broadcasting Group.

The present study provides a comparative analysis of the people-metrics data on television viewership in Bulgaria during the final matches of UEFA EURO 2020 and UEFA EURO 2024. The analysis

employs indicators such as rating (Rating %), audience share (Share %), and absolute audience size (Audience), which enable tracing the dynamics of media consumption in the context of two key sporting events (Tables 1, 2, and 3; Figure 5).

Table 1. *EURO 2020 final (people metrics)*

Television	Rating (%)	Share (%)	Audience
BNT 1	8.09%	28.37%	538 910
BNT 3	6.38%	22.49%	425 070
NBG	0.79%	2.76%	52 450

Table 2. *EURO 2024 final (people metrics)*

All 4+							
Date	Chanell	Program	Start	Final	Rtg%	Rtg'000	**Share %**
14.07.2024	BNT 1	UEFA EURO 2024 /live/ Spain - England	21:51:37	23:57:43	11.54	713.75	36.98
14.07.2024	BNT 3	UEFA EURO 2024 /live/ Spain - England	21:51:38	23:57:45	0.82	50.60	2.62
14.07.2024	DIEMA SPORT 3	UEFA EURO 2024 /live/ Spain - England	21:42:28	23:57:15	0.53	32.85	1.70
14.07.2024	NOVA TV	UEFA EURO 2024 /live/ Spain - England	21:55:56	23:57:28	7.23	446.97	23.15

Table 3. *EURO 2024 (people's metrics)*

25-54 years							
Date	Chanell	Program	Start	Final	Rtg%	Rtg'000	Share %
14.07.2024	BNT 1	UEFA EURO 2024 /live/ Spain - England	21:51:37	23:57:43	10.56	270.20	36.24
14.07.2024	BNT 3	UEFA EURO 2024 /live/ Spain - England	21:51:38	23:57:45	0.89	22.89	3.07
14.07.2024	DIEMA SPORT 3	UEFA EURO 2024 /live/ Spain - England	21:42:28	23:57:15	0.97	24.94	3.35
14.07.2024	NOVA TV	UEFA EURO 2024 /live/ Spain - England	21:55:56	23:57:28	6.77	173.20	23.21

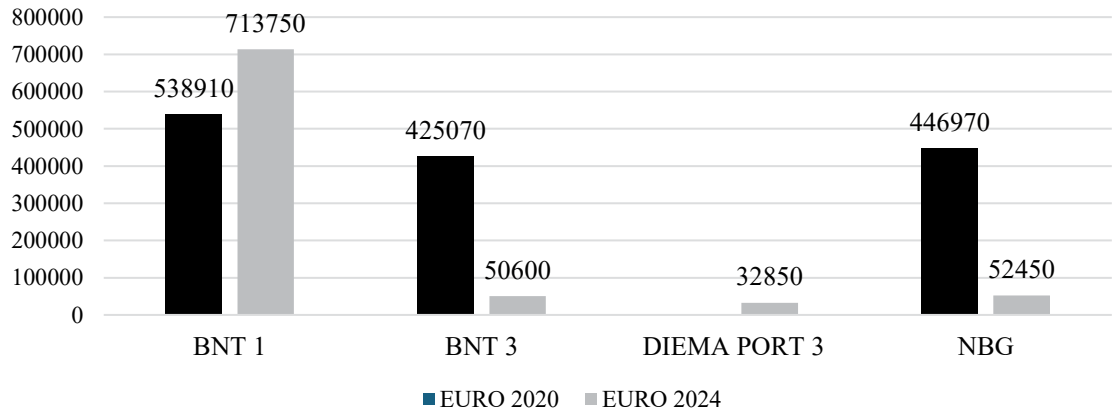

Figure 5. *Viewer comparison – final EURO 2020 / EURO 2024*

The figures clearly show BNT's dominant position, with its two channels. The total rating is 14.47%, which means that almost every seventh Bulgarian watched the match on the public broadcaster. The total share of the television audience is 50.86%. This indicates that more than half of all people watching TV during that time slot were tuned in to BNT channels. BNT's total audience was 963,980 viewers. This is nearly 1 million viewers, an exceptionally high result for a sporting event.

The data for the other broadcaster show a rating of 0.79% and a reach of 2.76%, indicating an almost

negligible impact on viewership for this event. In this context, an audience of only 52,450 viewers is insignificant.

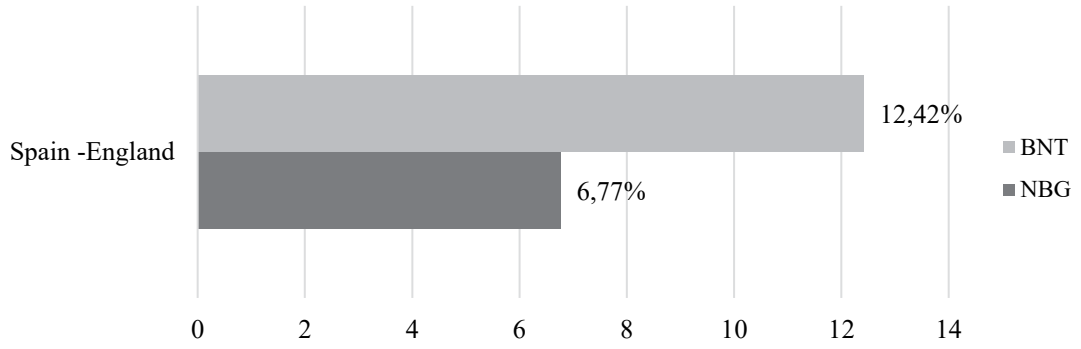

Figure 6. *UEFA EURO 2024 Rating% All 4+ FINAL*

DISCUSSION

The results of this study highlight key areas for discussion in the context of contemporary media practices and market dynamics.

In light of the interconnected and challenging dynamics in the geography, politics, and economics of sport (Chadwick, 2022), sponsors achieve global exposure for their sponsorship activations, which aim at corporate branding and the promotion of their products or services (Cornwell & Kwon, 2020). The UEFA European Football Championship provides a significant platform for sponsors due to its global reach. UEFA EURO 2020 reached a cumulative live audience of 5.23 billion viewers across 229 territories, recorded via 137 media operators (UEFA, 2021a). The data for UEFA EURO 2024 maintain these trends.

Given the changing media environment and the evolving engagement of football fans (Filo et al., 2015), it is particularly noteworthy that more Chinese viewers followed the matches through streaming platforms than via traditional television (UEFA, 2021a).

In the context of Bulgaria, in terms of reach and audience for both tournaments, BNT dominates across all key people metrics indicators. A stable audience of nearly 1 million viewers was recorded in 2020. The analysis of people metrics for the EURO 2024 final clearly shows that BNT had a higher people metrics rating compared to NBG, with a difference of approximately four percentage points, which is a significant advantage. The reasons for this may include: better broadcast or commentary quality on BNT, broader national coverage, greater trust in the public broadcaster, marketing efforts, or historical viewer preferences.

Regarding another indicator – audience behavior among the 25–54 age group in 2024 - BNT continues to be the key active demographic, which represents a strategic success. The behavior of this group is indicative of the marketing potential and advertising value for the broadcaster.

Media content also plays an important role and influences TV rating results. For instance, finals involving teams with traditionally large fan bases (such as England) naturally generate high interest. The quality of the media product is further enhanced by the commentary, studio production organization, and BNT's prior coverage of UEFA tournament matches.

The comparative analysis of audience share (%) highlights several important processes: the consolidation of viewers around BNT 1, whose share increased by more than 8 percentage points; the emergence of strong competition from NOVA TV, which managed to attract nearly one quarter of the audience; and the marginalization of BNT 3, whose significance in the media mix of UEFA EURO 2024 proved to be minimal.

The link between viewership data from the two tournaments is also evident in the media's advertising rate policies. Undoubtedly, high ratings justify higher advertising tariffs during such time slots.

The limitations of this study concern digitization and the future of people metrics. Traditional methods remain the foundation of analysis, but they do not account for online viewership and mobile consumption. There is a need to develop integrated measurement across streaming platforms and social media.

The data demonstrate a significant increase in television viewership in Bulgaria during the UEFA EURO

2024 final compared to UEFA EURO 2020. The role of the public broadcaster (BNT 1) remains dominant and is even further reinforced, while at the same time, private operators have entered the field, managing to capture a substantial share of the audience. This trend indicates an ongoing process of diversification within the television landscape and a shift in the consumption model, as audience interest is now distributed between public and private media.

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