

THE
**VIRTUAL
SPORTS FAN**
REPORT 2024

www.virtualsportsfan.com

THE VIRTUAL SPORTS FAN REPORT 2024

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cheer

WU Research
Institute
Sports and
Management

**CRYPTO
OASIS**

BOG X

sport1

ESB
MARKETING NETWORK

LAOLA1

FOXYFITNESS

MUUVR

TENNIS ESPORTS

LIBLACK BOX

LIGAPORTAL
BEINKLICKEN IST WIE MITKICKEN

02MOBILE

ASB GlassFloor

SKI CHALLENGE

KIA

TCL



G4U

socios.com

ZATAP

HUDDLE
- sport -



sportradar

**EHF
MARKETING**

Foreword

The **Virtual Sports Fan Report** is a pioneering **global analysis of current and future sports fan behaviours**. Rooted in performance, admiration and loyalty, the sports industry provides a dynamic yet standardised ecosystem for transparent comparison of realities and future hypothesis design.

With their established business models, sport and digitalisation are, each in their own right, global billion-dollar industries. As digital revenues and user interactions continue to grow, decision-makers in **sporting organisations are increasingly recognising the need to bring their existing and, more importantly, new offerings to digital platforms.**

Virtualisation, particularly within the metaverse, is gaining prominence, offering new opportunities for sports engagement. **With venture capital investments reaching over \$10 billion in 2021 and daily users projected to reach 2.6 billion by 2030, the metaverse presents vast potential for the sports business.¹²**

As technology evolves, with advancements like AI (Artificial Intelligence), blockchain, VR (Virtual Reality), and AR (Augmented Reality), there are new opportunities for interaction, communication, and commercialisation. This report aims **to highlight future-oriented use cases for the sports industry and facilitate embracing these new technologies, focusing on metaverse integrations.**

Through discussions with leaders across business, technology, media, and sports, this report seeks to contribute to further market development. **If we can make this imminent development more acceptable and highlight its value to all stakeholders, the report has accomplished its mission.**



Pascal Haider

Pascal Haider
CEO of Cheeer



Tom Berger

Tom Berger
Head of LAOLA1



¹ Kastrenakes, J. (2021, October 25). Facebook is spending at least \$10 billion this year on its metaverse division. The Verge. <https://www.theverge.com/2021/10/25/22745381/facebook-reality-labs-10-billion-metaverse>

² Metaverse - Worldwide | Statista Market Forecast. (n.d.). Statista. <https://www.statista.com/outlook/amo/metaverse/worldwide#:~:text=By%202030%2C%20the%20number%20of>

Introduction

Global fan interests, expectations, and opportunities are evolving.

In today's fast-paced digital landscape, global sports fans' interests, expectations, and opportunities are undergoing a transformative shift. With a plethora of sports content available across various platforms, capturing and retaining fans' attention has become increasingly challenging. Fans have transitioned from mere spectators to active participants, immersing themselves in the narratives of their favourite athletes and entertainers. Social media and streaming services have revolutionised fan interaction dynamics, making community building more direct and impactful.¹

At the same time, traditional website engagement metrics are waning, leading to missed revenue opportunities as fans flock to social media. Notably, Forbes highlighted that 82% of websites have shown inactivity out of the 1.13 billion that were indexed in 2023.² Moreover, the majority of Gen Z fans turn to social media to consume sports-related content, signalling a pivotal shift in fan engagement preferences.³

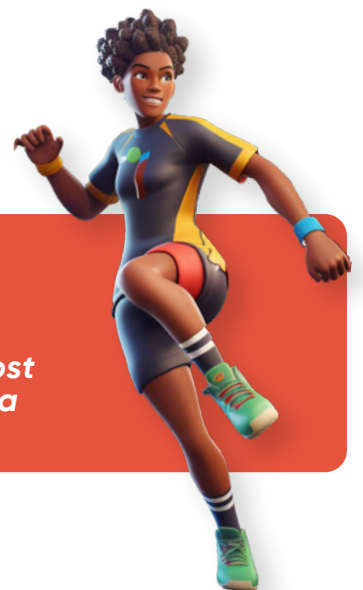
This report delves into the current state of sports fandom and explores how fans navigate the digital landscape. Additionally, it investigates how the latest technological advancements, particularly in virtual reality, can reenergize fan experiences.

Our exploration begins with a "Benchmark Analysis", examining the digital footprints of 200 sports clubs across their official websites and social media platforms to gain insights into prevailing fan behaviours and engagement levels. Additionally, we spotlight innovative clubs and brands worldwide, showcasing their pioneering strategies to connect with and captivate sports fans. As we dive deeper into virtualisation, we integrate Cheeer virtual plug-ins on our partners' websites, documenting findings on fan engagement.

▶
**Low
website
engagement**

▶
**Demand for
personalised
digital experiences**

▶
**Revenue
opportunities lost
to Social Media**



¹ Phillips, R. J. (2023, June 16). Council Post: Building Genuine Connections: The Role Of Technology In Cultivating Fan Engagement. Forbes.

<https://www.forbes.com/sites/forbestechcouncil/2023/06/16/building-genuine-connections-the-role-of-technology-in-cultivating-fan-engagement/?sh=12d9f3a61612>

² Bottorff, C. (2024, February 23). Website-Statistiken und -Trends 2023/2024. Forbes Advisor Deutschland.

<https://www.forbes.com/advisor/de/business/website-statistiken/0the%20number%20of>

³ 2023 sports fan insights: The beginning of the immersive sports era. (n.d.). Deloitte Insights. Retrieved March 9, 2024, from <https://www2.deloitte.com/uk/en/insights/industry/media-and-entertainment/immersive-sports-fandom.html/#fandom>

“

It is notoriously difficult to explain a 3D phenomenon using 2D media like slides. Get headsets, open up a wallet, ... and dive into it. Only when you expose yourself to these technologies will you find relevant use cases.



Tibor Mérey

Managing Director and Partner
at BCGx

Sports Fan Engagement Trends

The Fan Engagement market size is expected to reach over USD 27.3 billion by the year 2033.¹

Developing strategies to engage fans effectively is critical as the competition among sports and entertainment groups grows. Understanding the complex and changing fan behaviour is challenging but offers excellent opportunities for impactful engagement. Using data analytics and technology can provide insights into fan preferences, enabling customised content. Companies that create appealing and tailored fan engagement solutions can distinguish, generate new revenue, and grow a worldwide fanbase.²

Deloitte's survey of over 3,000 US sports fans aged 14 and above reveals that younger audiences now engage

with a wider variety of sports across **multiple platforms**, with a growing preference for streaming services that offer **enhanced viewing features**. This trend indicates a shift towards **more personalised and interactive sports experiences**, incorporating elements like virtual reality and digital collectibles. Particularly for Gen Z, **social interaction** plays a crucial role in sports viewing, both online and offline. Another growing trend in fan engagement involves **incorporating gamification tactics**, such as loyalty programs, engaging challenges, and interactive competitions as a means to motivate participation and sustain fan interest.³



¹ Fan Engagement Market. (n.d.). [Www.futuremarketinsights.com](https://www.futuremarketinsights.com/reports/fan-engagement-market). <https://www.futuremarketinsights.com/reports/fan-engagement-market>

² Ibid.

³ 2023 sports fan insights: The beginning of the immersive sports era. (n.d.). Deloitte Insights. Retrieved March 9, 2024, from <https://www2.deloitte.com/uk/en/insights/industry/media-and-entertainment/immersive-sports-fandom.html/#fandom>

Key Findings



1.2 billion people worldwide are aged between **15 and 24**, with **25%** of the global population under **15**.¹



Younger fans follow an average of **6 sports**, with football remaining the most popular.²



Fans spend less than **8 minutes** on sports club websites on average.



Over **50%** of visitors leave sports club websites after viewing just one page.



82% of the 1.13 billion websites indexed in 2023 showed inactivity.³



One-third of Gen Z individuals spend over **4 hours** daily on social media.⁴



¹ Thematic Factsheet | Youth and Empowerment. (2022). Unesco.org. <https://www.unesco.org/en/youth-and-empowerment>

² Sports fandom is increasing, powered by new digital platforms, global report finds. (2022, June). Nielsen. <https://www.nielsen.com/news-center/2022/sports-fandom-is-increasing-powered-by-new-digital-platforms-global-report-finds/>

³ Bottorff, C. (2024, February 23). Website-Statistiken und -Trends 2023/2024. Forbes Advisor Deutschland. <https://www.forbes.com/advisor/de/business/website-statistiken/0the%20number%20of>

⁴ Thomas, M. (2024, February 2). Where Does Gen Z Spend Most of Their Time Online? Later. <https://later.com/blog/gen-z-social-media-usage/>

CHAPTER 1

Welcome to Your Virtual Fanzone

CHAPTER 1

Welcome to Your Virtual Fanzone

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Introduction

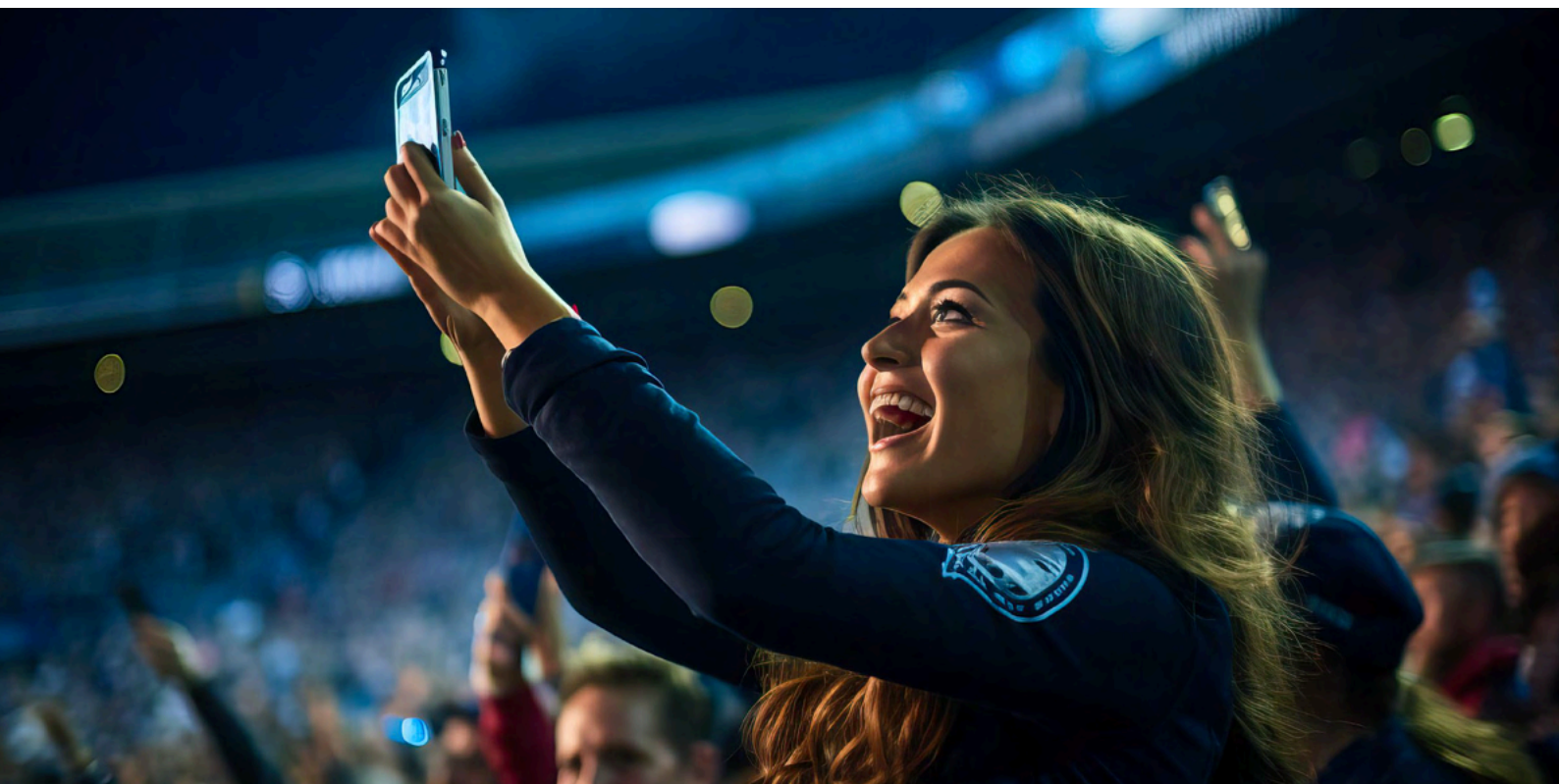
Fans at the heart of digital transformation.

Sport fans today are scattered across multiple platforms, often searching for a centralised space to connect and share their passion for sports. **This fragmented engagement highlights the growing need for a unified, community-centric approach where fans can come together to celebrate their teams, share experiences, and express their unique identities.**

At the heart of this transformation lies the importance of user-generated content, authenticity, and transparency. Fans don't want to be passive consumers. They seek an active role, contributing their voices through social media and engaging in exclusive entertaining environments. This approach strengthens fans' sense of identity, loyalty, and belonging.

In this report, we are listening to sports fans, clubs, and brands to better understand the shifting dynamics of modern sports fandom. As changes in fan engagement must come from the bottom up – starting with the fans themselves – we highlight how clubs can respond authentically to these evolving expectations. We emphasise how to place supporters at the centre of strategies by leveraging the power of data, new technologies, and emerging trends.

Additionally, we share the path towards building a website-integrated virtual hub for fans, Virtual Fanzone, which emerges as a natural solution within the digital context. We highlight how this report's insights influence and shape the project.



“

"Virtualisation in the sports industry redefines the way fans and data interact, ensuring that the experiences and insights shared are not only engaging but also grounded in the highest standards of data quality and integrity. With advancements in virtuality, we're able to bring fans closer to the game and stars with reliable, real-time data and secure platforms, enhancing the authenticity and trust that are essential to the sports community."



Dr. Anja Martin

Founder and CEO of PlayAI,
Former EVP Innovation at Sportradar

1. Community Centric Innovation

Make Fans Connected and Visible

Communities are at the foundation of sports fandom, with fans seeking a place to be visible, meet with other supporters and foster a sense of belonging, shared identity, and personal connections with like-minded individuals. Whether in stadiums, online forums, or on social media, fans gather to support their teams, experience and share emotions from the victories or losses. Digital communities, in particular, give supporters a powerful platform for connecting in real time with fans from diverse backgrounds and geographies. These digital fan networks foster long-term engagement, fan-generated content, shared experiences, and loyalty, especially among digital-native fans.

Benefits for Clubs & Brands:

- ✓ New markets expansion
- ✓ Increased organic engagement
- ✓ Enhanced fan retention
- ✓ Word of mouth and fanbase growth

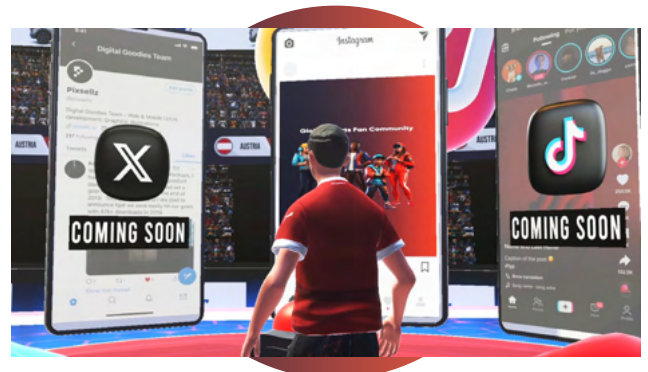


Insight in Action

Sports clubs are actively investing in building their social media presence and communities across platforms. As of June 2024, Real Madrid is the most followed football club globally, with over 410 million followers on social media pages, while Barcelona has attracted more than 360 million followers, and Manchester United has a community of over 216 million followers. Clubs attract fans to their social media channels by sharing exclusive content from players, collaborating with influencers and brands, and engaging with fans through broadcast channels and comments.

How Does it Work in the Virtual Fanzone?

A virtual Fanzone strives to become a community hub directly on the club's or brand's website, uniting all fans. Fans can express themselves, join discussions, share their passion with others, and participate in interactive events. Notably, Fanzones include social media integrations.



Sources: Statista. (2024). Most followed soccer clubs on social media. Statista.
<https://www.statista.com/statistics/1480806/soccer-clubs-social-media-following/>

2. Digital Identity & Merchandising

Empower Digital Personality

For younger fans, fandom is deeply connected to self-expression. Custom avatars and virtual merchandise enable digital-native fans to showcase their unique identities online. Teenagers, in particular, find character customisation a low-risk way to explore their identities and express themselves. This personalisation helps fans feel connected to their clubs even in virtual spaces. Exclusive digital items foster a sense of belonging and drive deeper engagement within the fan community.

Gen Z consumers are showing a growing interest in digital fashion, with 52% willing to spend up to \$10 monthly, 19% comfortable spending up to \$20, and another 18% open to allocating \$50-\$100 each month for digital items.

Benefits for Clubs & Brands:

- ✓ Deeper fan loyalty
- ✓ Exclusive offerings
- ✓ New revenue streams
- ✓ Empowered fan identity



Insight in Action

Fortnite and Roblox illustrate how digital identity and customisation are central to Gen Z's self-expression. In these immersive worlds, players create avatars with personalised skins, outfits, and accessories that often mirror or even inspire their real-life fashion choices. Roblox has seen a surge in avatar updates and digital clothing purchases, with nearly 1.6 billion items bought in 2023 alone. Styling avatars is often more significant to users than offline fashion, making these platforms a vital space for exploring identity, creativity, and individuality within a connected social environment.

How Does it Work in the Virtual Fanzone?

In the digital Fanzone, fans can create personalised avatars for their digital representation in the online world, which connect them to their favourite clubs, and to stand out within the fan community.



Sources:
Edpsy. (2024). Why young people with SEND love Fortnite. Edpsy.
<https://edpsy.org.uk/blog/2024/why-young-people-with-send-love-fortnite/#:-:text=Fortnite%20allows%20young%20people%20to,predictable%20and%20repetitive%20gameplay%20mechanic.>

Lampoon Magazine. (2024, January 27). Gamification and fashion: Self-representation in games like Roblox and Fortnite. Lampoon Magazine.
<https://lampoonmagazine.com/article/2024/01/27/gamification-fashion-self-representation-games-roblox-fortnite/>

3. Gamification

Keep Fans Engaged through the Power of Play

While fans are initially drawn to clubs' online platforms by their love and passion for the team, it's gamification that keeps them engaged and motivated to stay longer. Challenges, point systems, and rewards transform passive fans into active participants. By interacting with club activities, unlocking rewards, and completing challenges, fans experience a sense of achievement and are encouraged to return regularly. In this way, clubs can foster deeper loyalty and sustained engagement, staying aligned with new fans' desires for dynamic experiences and their passion for gaming.

Benefits for Clubs & Brands:

- ✓ Increased fan engagement & retention
- ✓ Innovative offerings & competitions
- ✓ Boosted brand loyalty
- ✓ New revenue streams



Insight in Action

Fantasy sports are one of the most powerful applications of gamification in sports, engaging millions of fans worldwide. By creating and managing fantasy teams, fans feel more invested in each player and game, as their standings depend on real-world outcomes. Fantasy leagues encourage fans to follow games more closely, interact with fellow fans, and participate in competitions that foster community and excitement. The connection to real games, friends, and rewards creates a blend of community engagement and gamification, motivating fans to track player performances and engage in lively discussions.

How Does it Work in the Virtual Fanzone?

Fans meet in the virtual Fanzone to complete specific challenges or engage with club content. They might participate in daily quizzes, predict match outcomes, or complete loyalty challenges to earn points and exclusive rewards or digital collectibles.



Sources: Lee, S. (2023, May 11). Why are fantasy sports so popular? STACK.
<https://www.stack.com/a/why-are-fantasy-sports-so-popular/>

4. Artificial Intelligence

Unlock the Next Level of Personalised Experiences

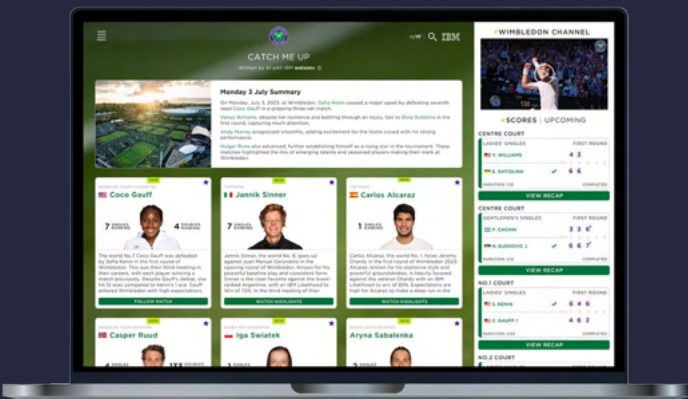
Artificial Intelligence (AI) is a technology that is becoming deeply integrated into our daily lives, from students using it to edit homework assignments to large corporations streamlining their processes. Sports are not an exception, especially when it comes to fan engagement. Clubs and brands can elevate the fan experience to a more personalised level, appealing to everyone's preferences. Thanks to AI analytics, clubs can gain insights into fan behaviours and interests, informing engagement strategies. In addition, they can ease content production, such as generating game highlights and delivering timely updates, while monitoring fan reactions in real time. Overall, AI offers clubs powerful tools for creating dynamic, data-driven experiences that resonate with fans' preferences.

Benefits for Clubs & Brands:

- ✓ High level of personalisation
- ✓ Data-driven decision making
- ✓ Innovative and streamlined experiences
- ✓ Increased revenue opportunities

Insight in Action

During Wimbledon, IBM's AI-powered "Catch Me Up" feature provided fans with personalised summaries of players' recent matches and upcoming challenges on the Wimbledon app and website. This allowed fans to receive updates quickly, while also saving the time of the Wimbledon editorial team by automating routine content creation. Similarly, NBC used an AI-generated clone of legendary broadcaster Al Michaels' voice to narrate daily recaps on Peacock during the Olympic Games in Paris. Trained on Michaels' past NBC appearances and developed with his consent, this AI voice provided viewers with a familiar and engaging experience.



How Does it Work in the Virtual Fanzone?

Within the digital Fanzone, one of the AI implications can be represented by a personal AI-powered host which could guide fans within the space, answer important questions, and provide personalised updates. For instance, an AI assistant might notify a fan about an upcoming match featuring their favourite player, recommend digital assets, or share a customised recap of recent games, making fans feel informed and valued.



Sources:

IBM. (2024). How IBM helps Wimbledon use generative AI to drive personalised fan engagement. IBM. <https://www.ibm.com/blog/how-ibm-helps-wimbledon-use-generative-ai-to-drive-personalised-fan-engagement/>

NBC News. (2024). NBC to use AI-generated version of Al Michaels' voice for Summer Olympics. NBC News. <https://www.nbcnews.com/news/nbc-use-ai-generated-version-al-michaels-voice-summer-olympics-rcna159108>

AI Business. (2024). Unlocking fan engagement: How AI is changing the game. AI Business. <https://aibusiness.com/data/unlocking-fan-engagement-how-ai-is-changing-the-game>

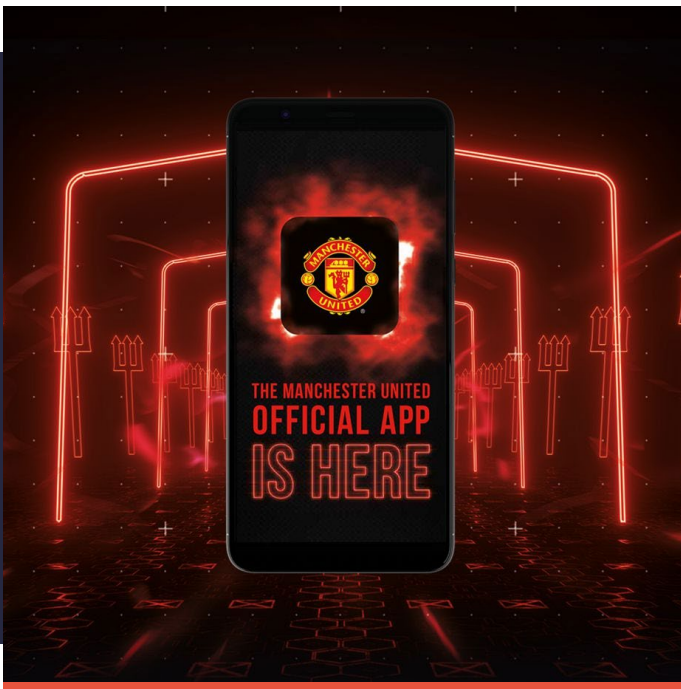
5. Live Content: Streaming & Engagement

Simultaneous Experiences, Community, and Real-Time Interaction

In today's digital, multi-platform world, sports fans crave immersive experiences that go beyond traditional broadcasts. They want interactive, real-time engagement that lets them connect with the game, their favourite players, and fellow supporters all at once. This need drives fans to use multiple platforms or seek multi-functional spaces where they can interact with friends, share emotions, and feel part of a community while watching the game. Live streaming with integrated social features enables fans to comment, react, and actively participate in events anytime, anywhere. This approach transforms passive viewing into active engagement, fostering a vibrant fan community even in digital spaces.

Benefits for Clubs & Brands:

- ✓ Deeper fan involvement
- ✓ Global community building
- ✓ Fan-generated content opportunities
- ✓ Increased sponsorship value



Insight in Action

Manchester United has developed a multi-functional app to strengthen its global fan community in the digital space. This platform offers fans access to live match broadcasts, real-time commentary, and interactive and exclusive features. Fans can access manager press conferences, explore the full Premier League collection on MUTV, and enjoy interviews and behind-the-scenes insights. The app also includes prediction games with opportunities to win prizes. Fans can also boost their "My United" level by engaging with daily streaks, match appearances, and more, improving fan satisfaction, engagement, and retention.

How Does it Work in the Virtual Fanzone?

Fans can meet in the digital Fanzone to watch games and participate in live chats with other supporters simultaneously. This integration of exclusive content, live experiences, and a shared sense of community makes fandom more engaging, inclusive, and accessible to everyone.



Sources:
Manchester United. Official app. <https://www.manutd.com/en/official-app>

6. Beyond the Clubs

Partner Integration & Sponsorships

Younger fans often value their favourite clubs and teams so much that they become part of their identities. For this reason, sponsorship activations of brands in collaboration with sports clubs can bring innovative opportunities to improve brand visibility and, at the same time, make fans feel more engaged and connected. Sponsorship activations help brands to interact with their target audience through sports-related events or partnerships with athletes and teams. Partnership integrations create room for new memorable experiences that align with fans' passion while also bringing new revenue streams. However, clubs and brands must ensure their collaborations are authentic and valuable rather than solely oriented to additional revenue generation.

Benefits for Clubs & Brands:

- ✓ New monetisation opportunities
- ✓ Exclusive offers for fans
- ✓ Brand visibility & innovation leadership
- ✓ Deeper fan engagement



Insight in Action

Collaborations with sponsors during events can boost engagement and create memorable experiences. The NBA's "Fan of the Game" initiative, sponsored by Toyota, rewards most enthusiastic fans in the crowd with prizes, strengthening connections with fans and building positive brand associations. Similarly, digital activations highlight club initiatives and partnering brands. Coinbase ran a creative Super Bowl ad featuring a bouncing QR code, encouraging attendees and viewers to scan it and claim a limited-time offer. The campaign generated immense traffic, temporarily crashing the platform.

How Does it Work in the Virtual Fanzone?

Fanzone can provide a digital space for sponsors to innovate and connect with fans. There, they can host branded exclusive promotions and collaborations connected to fans' sports passion while at the same time giving them a glimpse into what the brand is offering. Thus, clubs offer sponsors new opportunities to stand out in a competitive landscape.



Sources:
 LeverEdge. (202). Strategic partnerships in sports and entertainment: A game-changer. LeverEdge.
<https://www.leveredge.pro/insights/strategic-partnerships-in-sports-and-entertainment%3A-a-game-changer>

Event Goods Delivered. (2024). Boosting engagement: 10 creative examples of sponsor activations at sports events. Event Goods Delivered.
<https://www.eventgoodsdelivered.co.uk/post/boosting-engagement-10-creative-examples-of-sponsor-activations-at-sports-events>

7. Transparency & Data Analytics

Boost Fan Engagement Through Informed Insights

Data analytics is an integrated part of business processes in the sports industry. Clubs that embed analytics into their operations gain access to valuable insights into constantly evolving fan behaviour, preferences, and engagement patterns. The power of analytics lies in its ability to transform raw data into transparent and actionable information that drive engagement and revenue. Whether optimising marketing strategies or measuring campaign results, clubs relying on data can make informed and impactful decisions. Sports clubs with direct access to data benefit from faster and more efficient decision-making.

Benefits for Clubs & Brands:

- ✓ Data-driven decision-making
- ✓ Integrated processes & transparency
- ✓ Personalised marketing
- ✓ Rapid problem identification & resolution



Insight in Action

Sports team management increasingly integrates data to boost athletic performance, improve injury prevention, and develop personalised training programmes. Additionally, many clubs collaborate with analytical services to gain quantitative insights about their fanbase. For example, FC Bayern München has partnered with Adobe to strengthen its connection with fans. By implementing Adobe Experience Cloud and Adobe's Real-Time Customer Data Platform, the club has adopted a data-driven approach to elevate the fan experience for its millions of supporters worldwide.

How Does it Work in the Virtual Fanzone?

In the Virtual Fanzone, clubs and brands have access to personal dashboards, which offer a centralised view of fan engagement, campaign performances, and other metrics inside of the digital space. This system enables clubs to monitor and analyse fan activity in real time, improving the overall fan engagement processes.



Sources:
 Adobe. (2022). Fan engagement: The new holy grail for sports brands. Adobe Blog.
<https://blog.adobe.com/en/publish/2022/08/25/fan-engagement-new-holy-grail-for-sports-brands>

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"EHF Marketing's partnership with Cheeer enables us to captivate digital-native fans through exclusive virtual experiences, creating unique, 'can't-miss' moments. Together, we're shaping fan engagement by developing virtual products and gamified content, exploring new opportunities for our partners, and elevating the fan experience."



EHF Marketing

Digital Fanzone Use Case

Ethics and Inclusivity in Virtual Spaces



How can sports contribute to building a society founded on solidarity? How does this translate into today's digital settings? Can we make virtual environments for sports fans more inclusive?

To address these questions, Tom Berger, Head of LAOLA1, joined forces with the Austrian National Team (ÖFB), the Vienna University of Economics and Business (Institute for International Business & RISM), and Cheeer to launch an experiment within the ÖFB's Official Virtual Fanzone.

What is an ÖFB Virtual Fanzone?

In collaboration with the ÖFB and LAOLA1, Austria's largest sports media platform, Cheeer developed an **innovative Virtual Fanzone** to build excitement ahead of the EURO 2024 in Germany. This immersive space offers a variety of **engaging experiences for fans**.

- ✓ **Community & Gamification:** Fans can meet inside and enjoy a Minecraft-inspired **puzzle game** where they recreate the ÖFB logo and a penalty shootout game to test their striking skills. They can also complete an **interactive quiz** that challenges even the most dedicated ÖFB supporters on their knowledge of the team.
- ✓ **Digital Identity & Merchandising:** Fans can create **personal digital avatars** and customise them with official ÖFB jerseys.
- ✓ **Artificial Intelligence:** **AI-host** can provide navigation **assistance** and answer other questions within the Fanzone.
- ✓ **Beyond the Clubs:** Fanzone additionally features **dedicated areas for sponsor activations**, seamlessly integrating commercial opportunities into the fan experience.



- ✓ **Transparency & Data Analytics:** Fan behaviour insights are accessible via the personal ÖFB dashboard.
- ✓ **Live Content. Streaming & Engagement:** Fans can gather virtually to watch games and interviews, share emotions, and discuss matches in real time.

Scientific Background & Relevance

Racial bias is highly prevalent in consumer behaviour and yields negative consequences such as decreased uptake or satisfaction with respect to goods provided by a seller who is of a different race. Web3 and metaverse technologies provide a unique opportunity to combat this issue by allowing service providers to design interventions/features that can reduce racial bias in consumers. Moreover, considering such consumer behaviours in the context of sports provides yet another unique opportunity because sports fans often have a strong social identity with respect to their team, which could be leveraged to design effective interventions.

More About the Experiment

The study examines the impact of virtual environment design features on user behaviour, specifically focusing on racial bias within a virtual Fanzone. In the experiment, participants navigate a virtual Fanzone where they engage with various tasks, including sharing personal information with virtual representatives of different races. Two primary interventions are tested: group identity cues (i.e., wearing a football jersey) and anti-racist nudges. The study hypothesises that these elements will reduce bias in interactions with representatives of another race.

Study's Implications

This research presents an example of virtual spaces' applications in academic contexts to explore social issues. Its findings aim to benefit academic research and provide insights into designing more inclusive virtual environments, especially relevant to sports and digital interactions.

Fans participating in the study also received the chance to win exciting prizes, such as tickets to ÖFB matches and official team merchandise.

Conclusion

Embracing innovation in fan engagement.

As the sports industry continues to evolve, the way fans engage with their favourite teams is undergoing a profound transformation. It reflects a broad shift towards digital-first, data-driven strategies that meet the expectations of modern, tech-savvy audiences.

The Virtual Fanzone concept merge in this context as a natural progression in the evolution of fan experience and the digitalisation of sports. This solution offers more than a digital gathering space with emerging trends and technologies. It represents how a unified platform can connect clubs with supporters, blending entertainment, interaction, and innovation.

Features such as personalised avatars, virtual merchandise, and gamified challenges enable fans to express their loyalty in creative and immersive ways, adding a new dimension to digital identity. Transparency through data-driven insights and real-time dashboards ensures

clubs remain responsive and accountable while delivering measurable value to their fanbase. Simultaneously, live streaming and interactive tools create dynamic, shared experiences that keep fans engaged no matter where they are.

The Virtual Fanzone also unlocks new opportunities for brand collaborations and sponsor activations. It presents an innovative platform for co-branded content with exclusive offers and interactive campaigns that improve fan value while driving revenue for clubs and partners.

This innovative concept sets a new standard for supporting a team in the digital era. A unified, tech-driven platform combines gamification, interactivity, and innovation, ensuring fans remain at the heart of sports culture while clubs continue to thrive in an ever-changing landscape.



CHAPTER 2

Global Sports Fan Community

Introduction

It's all about the fans.

In today's sports landscape, fans are more than just spectators – they are the heartbeat of the industry, and their expectations are evolving at an incredible pace. With younger generations stepping into the spotlight, sports fandom is being reshaped in exciting and innovative ways. This new wave of sports enthusiasts craves personalised, immersive experiences delivered through digital platforms and social media. Their engagement is more dynamic, fast-paced, and ever-changing. Adapting to these shifts and focusing on interactive experiences is essential for businesses.

In the third edition of the Virtual Sports Fan Report, we explore the profound impact of generational changes on sports fandom, focusing on how younger fans are trans-

forming traditional engagement. By examining the unique traits of Gen X, Gen Z, Millennials, Gen Y, and Baby Boomers, we uncover how generational trends are influencing the present and future of fandom. Through detailed research and in-depth interviews, we have developed seven fan personas – five representing younger audiences and two for older ones – each illustrating their distinguishing characteristics.

This edition helps sports brands and clubs understand and visualise their fans' evolving preferences. As the future of fandom continues to unfold, staying attuned to these trends will be essential to remain competitive in an increasingly digital and fan-driven world.



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Global Sports Fandom Trends

Sports fandom is expanding and evolving, driven by digital developments and technology.

Globally, sports fans are diverse due to regional preferences, cultural contexts, and technological advancements. A recent study by Nielsen & LaLiga Tech, involving over 20,000 respondents from 15 countries, highlights the following **key trends in global sports fandom**:

Rising Interest in Sports

Fans today are following and consuming a broader range of sports compared to previous generations, likely due to the increased availability of competitions. Younger fans, particularly those under 34, follow an average of around six sports. Football remains the most popular sport, followed by tennis, basketball, track and field, motorsport, and mixed martial arts. Overall, a varied selection of 65 sports, from popular to niche, emerges as of significant interest, highlighting the wide-ranging and committed enthusiasm of fans.

Diverse Global Following

Emerging markets like Nigeria, Indonesia, Colombia, Turkey, India, and the UAE show the highest interest in sports, emphasising the need for sports organisations to engage international audiences. These regions offer significant untapped potential, and digital platforms provide new ways to connect with global fans.

Digital and Data-Driven Consumption

Younger fans are more interested in streaming and mobile experiences, including fantasy games. Nearly half of these fans prefer watching sports on smartphones or tablets. This demographic is also highly engaged with live statistics during games, reflecting their desire for interactive, data-rich experiences. This group, primarily aged 16-35, uses digital platforms extensively, showing a shift in consumption habits.



High Trust in Sports Brands

Fans' activity, demonstrated by the time spent engaging with content and their positive responses to sponsored programmes and activities, indicates high levels of trust in sports brands and their sponsorships at major events. Their loyalty seems closely linked to the brands' ability to build and maintain strong communities and deliver unique, high-quality experiences.

Active Fan Engagement

Younger fans are choosing active engagement over passive content consumption. They seek more in-depth content, such as behind-the-scenes coverage, and participate actively in forums and social media discussions. They look for ways to interact dynamically with their favourite sports and teams by engaging with games and competitions.

Multi-Screen and Multi-Platform Preferences

OTT (Over-the-Top) streaming is becoming the preferred method for sports consumption. Sports are now competing with a variety of content for viewers' attention. While watching sports, fans frequently send emails, play online games, join message boards, chat on social media, and engage in fantasy games. They also place bets and respond to in-game prompts, like in-game purchases in popular games like Fortnite. Younger fans particularly engage in multi-screen activities, involving fantasy leagues, gaming, and social media community interaction.

Digital natives actively consume global sports content across digital platforms, seeking a more interactive and engaging experience.



Source: Sports fandom is increasing, powered by new digital platforms, global report finds. (2022, June). Nielsen.
<https://www.nielsen.com/news-center/2022/sports-fandom-is-increasing-powered-by-new-digital-platforms-global-report-finds/>

Deloitte's key insights on younger fans: ¹

61%

**watch live sports
with others.**

Nearly half of Gen Z viewers engage with social media to share or view comments during live events at home.

77%

**multitask during
sports viewing.**

Younger viewers engage in at least one additional activity related to the event: checking stats, social media, watching other games, betting, or playing fantasy sports.

70%

**express interest in
VR sports activities.**

Gen Z and Millennial fans are intrigued by VR sports activities, including playing VR games, virtually attending live events, and sharing experiences.

¹2023 sports fan insights: The beginning of the immersive sports era. (n.d.). Deloitte Insights. Retrieved March 9, 2024, from <https://www2.deloitte.com/uk/en/insights/industry/media-and-entertainment/immersive-sports-fandom.html/#fandom>

Global Demographics

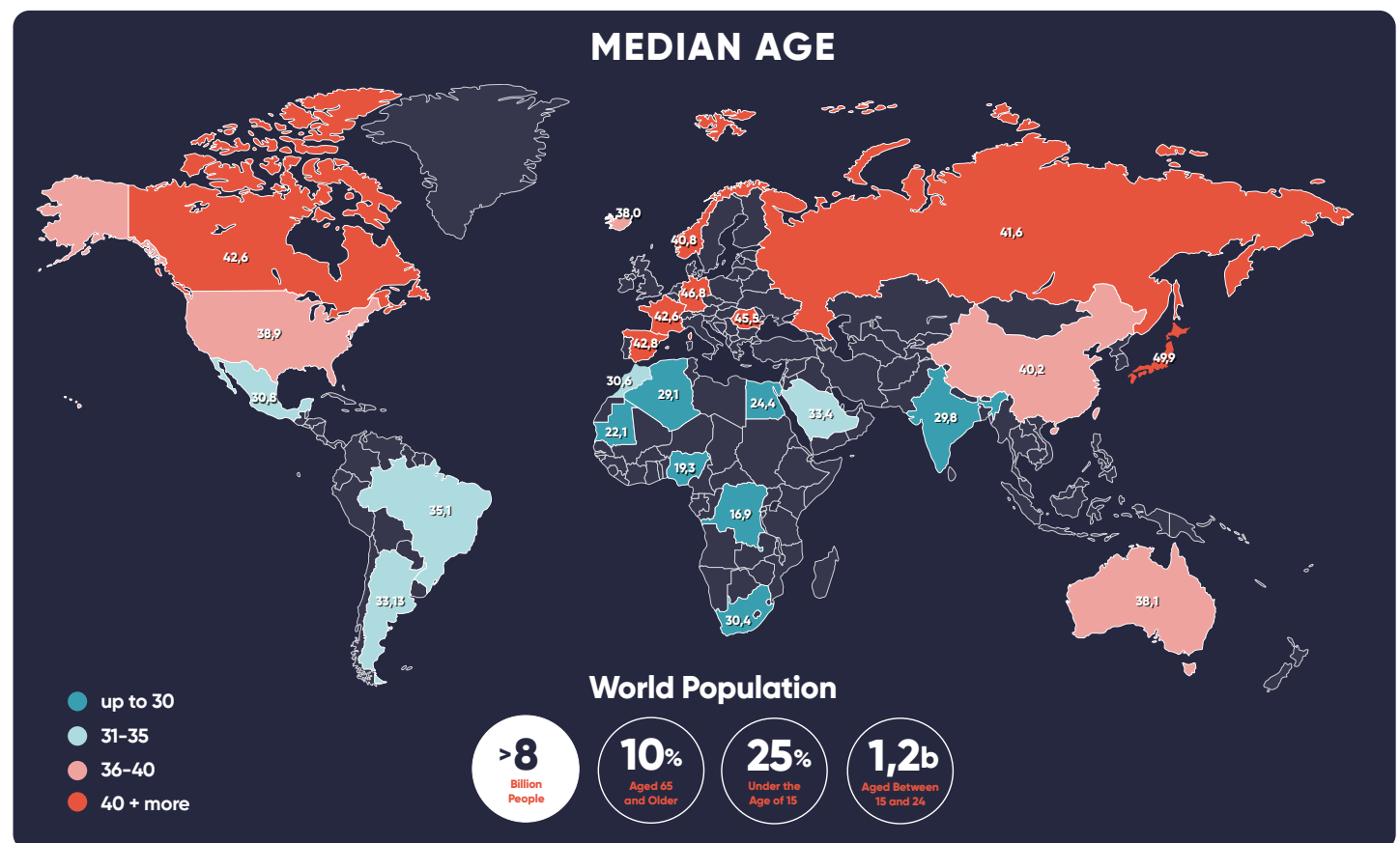
The world population is predominantly youthful, especially in emerging markets, contrasting with the ageing populations in developed countries.

According to the 2023 World Population Data Sheet, the total global population exceeds 8 billion people, with India contributing 1.43 billion to this figure. By the end of 2022, 10% of the world's population was aged 65 and older, while 25% were under the age of 15.¹

The global population shows significant variations in age distribution across different regions. **UNESCO data from 2023 indicates that the world is home to the largest generation of young people in history, with 1.2 billion individuals aged between 15 and 24.** A significant majority of this youth population, close to 90%, resides in

developing countries, where they constitute a large proportion of the population.² For instance, sub-Saharan Africa is the youngest region globally, with 42% of its population under the age of 15. In contrast, the oldest populations are typically found in Europe, with 21% of Southern Europe's population aged 65 and older, a trend similarly observed in Western Europe.¹

According to UNICEF, **there are 1.3 billion adolescents globally, comprising 16% of the world's population.** The United Nations defines adolescents as individuals aged between 10 and 19 years.³



¹ PRB's 2023 World Population Data Sheet. (2023). Population Reference Bureau. <https://2023-wpds.prb.org/>

² Thematic Factsheet | Youth and Empowerment. (2022). Unesco.org. <https://www.unesco.org/en/youth-and-empowerment>

³ UNICEF. (2022, April). Adolescents. UNICEF DATA. <https://data.unicef.org/topic/adolescents/overview/>

Median Age

Rank	Country	Years
1	Monaco	56.9
2	Saint Pierre and Miquelon	51.2
3	Japan	49.9
4	Andorra	48.8
5	Italy	48.4
6	Saint Barthelemy	47.4
7	Hong Kong	47.2
8	Spain	46.8
9	Germany	46.8
10	Greece	46.5
11	Portugal	46.4
12	Slovenia	46.3
13	Puerto Rico	46.1
14	San Marino	46.1
15	Korea, South	45.5
16	Romania	45.5
17	Latvia	45.5
18	Lithuania	45.1
19	Bulgaria	45.1
20	Croatia	45.1
21	Saint Helena, Ascension, and Tristan da Cunha	45.1
22	Estonia	45
23	Guernsey	45
24	Austria	44.9
25	Ukraine	44.9
26	Isle of Man	44.9
27	Hungary	44.8
28	Bosnia and Herzegovina	44.8
29	Taiwan	44.6
30	Liechtenstein	44.2
31	Czechia	44.2
32	Switzerland	44.2
33	Serbia	43.9
34	Bermuda	43.8
35	Malta	43.5
36	Finland	43.3
37	Virgin Islands	43
38	Poland	42.9
39	Slovakia	42.8
40	Canada	42.6
41	France	42.6
42	Cuba	42.6
43	Macau	42.5
44	Netherlands	42.2
45	Denmark	42.2
46	Belarus	42.1
47	Belgium	42
48	Russia	41.9
49	Thailand	41.5
50	Barbados	41.4
51	Cayman Islands	41.2
52	Sweden	41.1
53	Cook Islands	41.1
54	Montenegro	41.1
55	Sint Maarten	41
56	Aruba	40.9
57	Norway	40.8

Rank	Country	Years
58	United Kingdom	40.8
59	North Macedonia	40.5
60	Ireland	40.2
61	China	40.2
62	Cocos (Keeling) Islands	40
63	Moldova	39.9
64	Luxembourg	39.9
65	Saint Lucia	39.7
66	Mauritius	39.6
67	Cyprus	39.5
68	Singapore	39.4
69	United States	38.9
70	Armenia	38.9
71	Seychelles	38.7
72	Saint Kitts and Nevis	38.6
73	Trinidad and Tobago	38.5
74	British Virgin Islands	38.5
75	Georgia	38.3
76	Jersey	38.2
77	Australia	38.1
78	Christmas Island	38
79	Iceland	38
80	New Zealand	37.9
81	Curacao	37.8
82	Saint Vincent and the Grenadines	37.6
83	Anguilla	37.1
84	Dominica	37
85	Chile	36.9
86	Faroe Islands	36.8
87	Montserrat	36.8
88	Gibraltar	36.8
89	Uruguay	36.5
90	Lebanon	36.3
91	Albania	36.3
92	Wallis and Futuna	36.3
93	Turks and Caicos Islands	36.3
94	Korea, North	35.9
95	United Arab Emirates	35.8
96	Costa Rica	35.5
97	Grenada	35.4
98	French Polynesia	35.3
99	Palau	35.3
100	Greenland	35.3
101	Brazil	35.1
102	Tunisia	34.4
103	New Caledonia	34.3
104	Azerbaijan	34.3
105	Qatar	34.3
106	Saint Martin	34.2
107	Sri Lanka	34.1
108	Turkey (Turkiye)	34
109	Antigua and Barbuda	33.9
110	Iran	33.8
111	Bahrain	33.4
112	Argentina	33.3
113	Vietnam	33.1
114	Colombia	32.7

Rank	Country	Years
115	Saudi Arabia	32.4
116	Northern Mariana Islands	32.4
117	Brunei	32.3
118	Suriname	32
119	Kosovo	32
120	Maldives	31.9
121	Kazakhstan	31.9
122	Malaysia	31.8
123	Paraguay	31.8
124	Fiji	31.6
125	Indonesia	31.5
126	Mongolia	31.5
127	Panama	31.5
128	Turkmenistan	31.2
129	Venezuela	31
130	Jamaica	30.9
131	Burma	30.8
132	Mexico	30.8
133	Bahamas, The	30.7
134	Bhutan	30.7
135	Morocco	30.6
136	South Africa	30.4
137	Guam	30.3
138	Kuwait	30.3
139	Peru	30.2
140	Israel	30.1
141	American Samoa	30
142	India	29.8
143	El Salvador	29.7
144	Bangladesh	29.6
145	Dominican Republic	29.2
146	Algeria	29.1
147	Nicaragua	29
148	Uzbekistan	28.9
149	Cabo Verde	28.8
150	Guyana	28.3
151	Kyrgyzstan	28.3
152	Micronesia, Federated States of	28.2
153	Ecuador	28
154	Cambodia	27.9
155	Tuvalu	27.8
156	Nauru	27.8
157	Nepal	27.6
158	Samoa	27.4
159	Oman	27.3
160	Kiribati	27.3
161	Botswana	27.1
162	Belize	26.8
163	Bolivia	26.6
164	Djibouti	26.3
165	Libya	26.2
166	Tonga	25.9
167	Philippines	25.7
168	Honduras	25.7
169	Marshall Islands	25.5
170	Laos	25.4
171	Solomon Islands	25.2

Rank	Country	Years
172	Jordan	25
173	Haiti	25
174	Guatemala	24.8
175	Eswatini	24.6
176	Vanuatu	24.6
177	Egypt	24.4
178	Syria	24.1
179	Lesotho	23.9
180	Pakistan	22.9
181	Tajikistan	22.8
182	Namibia	22.8
183	Comoros	22.7
184	Iraq	22.4
185	Mauritania	22.1
186	Equatorial Guinea	22.1
187	Gabon	22
188	Yemen	22
189	West Bank	21.9
190	Papua New Guinea	21.7
191	Ghana	21.4
192	Eritrea	21.3
193	Madagascar	21.3
194	Zimbabwe	21.2
195	Cote d'Ivoire	21.2
196	Kenya	21.2
197	Sao Tome and Principe	20.8
198	Rwanda	20.8
199	Togo	20.7
200	Congo, Republic of the	20.7
201	Timor-Leste	20.6
202	Central African Republic	20.4
203	Ethiopia	20.4
204	Malawi	20.3
205	Gambia, The	20.2
206	Afghanistan	20
207	Liberia	19.9
208	Gaza Strip	19.5
209	Guinea	19.4
210	Sierra Leone	19.4
211	Nigeria	19.3
212	Sudan	19.3
213	Senegal	19.2
214	Tanzania	19.1
215	Somalia	19.1
216	Cameroon	18.9
217	South Sudan	18.7
218	Burkina Faso	18.7
219	Zambia	18.4
220	Burundi	18.4
221	Guinea-Bissau	18.4
222	Mozambique	17.3
223	Benin	17.2
224	Congo, Democratic Republic of the	16.9
225	Chad	16.7
226	Mali	16.4
227	Angola	16.3
228	Uganda	16.2
229	Niger	15.2

**New
Sports Fans**



**Traditional
Sports Fans**

New Sports Fans

Description

- **AGE:** Primarily Generation Z (12 – 27) and Millennials (28 – 43).¹
- **Geographical Distribution:** High concentration in emerging markets.
- **Digital Natives:** Grew up with the internet and are mostly native with digital tech.

Sports Fan Behaviour:

- ▶ **Digital Engagement:** Consume sports through mobile devices, laptops, and tablets, often multitasking with multiple screens.
- ▶ **Active Participation:** Actively participate in fantasy sports, betting, and live game statistics.
- ▶ **Social Media Presence:** Follow favourite teams and athletes, share content, participate in online communities, and engage in discussions.
- ▶ **Social Connection:** Prioritise watching sports with friends, value community and connection, and consider fandom as part of their identity.
- ▶ **Brand Preference:** Favour brands that sponsor sports-related social content over traditional TV ads during live games.
- ▶ **Future Enthusiasm:** Excited about VR sports experiences, particularly VR sports related games, and keen on purchasing fan tokens with benefits.



¹Beresford Research. (2024). Age Range by Generation. <https://www.beresfordresearch.com/age-range-by-generation/>

Traditional Sports Fans

Description

- **AGE:** Primarily Generation X (44 – 59) and Boomers (ages 60 – 78).¹
- **Geographical Distribution:** Higher concentrations in developed regions.
- **Digital Natives:** More familiar with traditional media and slower to adopt digital trends.

Sports Fan Behaviour:

- ▶ **Traditional Viewing:** Consume sports content predominantly through television broadcasts, usually on a single screen, with minimal interaction on other devices.
- ▶ **Passive Interaction:** Fan engagement is more passive, focusing on watching games on TV and reading detailed media reports with sports statistics.
- ▶ **Limited Social Media Use:** Use social media not frequently, mainly to keep up with family and friends, rather than engaging deeply with sports content.
- ▶ **Preference for In-Depth Coverage:** Prefer comprehensive coverage and in-depth analysis from traditional sports media over fragmented, short-form content.
- ▶ **Live Event Attendance:** More likely to attend live sports events, valuing the excitement of being in the stadium.
- ▶ **Brand Loyalty:** Exhibit stronger loyalty to brands and sponsors associated with their favourite sports and teams, with a greater trust in traditional advertisements.



¹Beresford Research. (2024). Age Range by Generation. <https://www.beresfordresearch.com/age-range-by-generation/>

Traditional Generation of Fans

2 Personas



Kenji

The Classic Sports Enthusiast



Linda

The Devoted Stadium Attendee

Meet Kenji

The Classic Sports Enthusiast

• **AGE:** 45 years old

• **Location:** Japan

Kenji, a 45-year-old mid-level manager from Japan, is a dedicated sports fan who prefers established routines. Raised on cable TV and printed media, he prefers the consistency and depth of coverage offered by traditional platforms.

Key Characteristics:

- ▶ **Traditional Media:** Kenji continues to rely on TV broadcasts, only occasionally checking websites for scores.
- ▶ **Nostalgia-driven:** His connection to sports is deeply rooted in childhood memories of watching games with family or friends and his loyalty to his favourite club.
- ▶ **Expectations:** Kenji values detailed, expert commentary and in-depth post-game analysis. He looks for broadcasters who provide deep insights rather than quick highlights or shallow coverage.
- ▶ **No-Goes:** He avoids fast-paced, overly digital experiences like short clips or social media updates.

Sports Fan Behaviour:

- ▶ Kenji remains loyal to his favourite sports leagues, which he has followed for decades. He prefers the comfort of watching games at home on TV, sometimes joining friends who attend live events. He doesn't follow sports news on social media, preferring to read post-game articles from trusted sports publications.



Traditional Sports Viewing

Baby Boomers and Gen X prioritise live events and TV, valuing loyalty and community over digital engagement.

For decades, traditional sports viewing revolved around fans gathering in stadiums or arenas to support their favourite teams, benefiting from communal experiences. Watching games on television or listening via radio was also a popular pastime. **Older generations of sports fans, as evidenced by their preferences and behaviours, remain more inclined towards these traditional experiences compared to younger fans.**¹

Research shows that older sports fans tend to favour conservative viewing experiences. **Nearly half of individuals aged 55 to 64 prefer TV over online platforms and never engage with online content.** A significant portion of this demographic watches sports online less than once a month, if at all. In contrast, over 70% of these fans tune into sports on TV daily or weekly.

Furthermore, older fans are generally less inclined to pay for access to sports content compared to younger generations. This reluctance is evident in subscription

rates: while over half of fans aged 16-24 and 25-34 are willing to pay for sports content, only about a third of fans aged 55-64 and 45-54 share this willingness.²

The Baby Boomer generation prefers consuming sports through live attendance and television, with communication methods such as phone calls and emails being their favourite means of interaction. These habits are often linked to a strong sense of team loyalty and community among fellow supporters. Baby Boomers tend to remain loyal to a particular club and are resistant to adopting new sports or teams. Consequently, they are more likely to purchase full-season tickets rather than single-entry ones.

Similar conservative viewing and communication patterns are seen among Generation X. Among social media platforms, Facebook is the most effective tool for engaging this generation, while short video content tends to have less appeal. Parents from Generation X value fami-



ly-friendly sports experiences when buying tickets. As fans, they appreciate nostalgic appeals, such as retro jerseys or historic game series, and enjoy receiving pre-match and post-event communications, which strengthens their connection to their club.³

When considering the purchasing behaviour of older fans, it is worth noting that Baby Boomers allocate the largest portion of their spending to local sporting events, with Generation X following closely. Baby Boomers also lead in per-person spending at these events. While Millennials dedicate the highest share of their overall spending to food and drink at local restaurants, Baby Boomers outspend them on a per-person basis.⁴

The appeal of attending live sports remains particularly strong among older fans due to the tradition and emotional connection they associate with live events. According to a Statista survey, 38% of Generation X and 37% of Baby Boomers regularly visit stadiums, compared to just 17% of younger fans.⁵

In conclusion, Baby Boomers and Generation X sports fans prefer traditional sports viewing, favouring live attendance and TV due to their strong sense of loyalty and community. This is also reflected in their spending habits and engagement, with a clear preference for in-person experiences over digital content.



¹ Integrating Virtual Reality for Immersive Sports Viewing Experiences. (2024, May 10). Moldstud.com. <https://moldstud.com/articles/p-integrating-virtual-reality-for-immersive-sports-viewing-experiences>

² Sports Industry: On track for growth? PwC's Global Sports Survey (8th Edition). (2024). PwC.

³ How to Engage Fans of Different Generations? (2022, September 2). TISA. <https://www.tisagroup.ch/how-to-engage-fans-of-different-generations/>

⁴ Baby Boomers Devote the Largest Percentage of Their Spending to Local Sporting Events. (2018, March 9). SalesFuel. <https://salesfuel.com/baby-boomers-devote-largest-percentage-spending-local-sporting-events/>

⁵ Share of sports fans who regularly visit the stadium worldwide by age 2019. (n.d.). Statista. <https://www.statista.com/statistics/1100555/sports-fans-stadium-visits/>

Meet Linda

The Devoted Stadium Attendee

• **AGE:** 65 years old

• **Location:** UK

Linda, a 65-year-old retired teacher from the UK, is a community and tradition-oriented sports fan. Unlike younger generations, Linda remains largely disconnected from digital sports platforms, preferring live events and more traditional forms of media like newspapers and TV.

Key Characteristics:

- ▶ **Live Attendance:** Linda is an avid attendee of live sports events. She has a long history of following her favourite teams in person and considers attending games an integral part of being a fan.
- ▶ **Community Focused:** Linda's sports engagement is deeply intertwined with her community. She participates in local sports clubs and enjoys the social interactions of being a fan.
- ▶ **Expectations:** Linda prefers straightforward sports coverage, emphasising the personal and nostalgic connections she has to her favourite teams. She enjoys pre- and post-match coverage that includes interviews with long-time players or discussions of historical games.
- ▶ **No-Goes:** She dislikes digital-only experiences, finding them impersonal and disconnected from the traditions she cherishes.

Sports Fan Behaviour:

- ▶ Linda's sports consumption revolves around live events and traditional media. She regularly attends local matches, favouring the atmosphere of the stadium and the connection it brings to her community. On non-match days, she reads the sports section of her local newspaper. Linda isn't tech-savvy, preferring personal interactions with fellow fans.



New Generation of Fans

5 Personas



Sophia

The Social Media
Maven

Carlos

The Fitness Buff

Usman

The Social Justice
Champion

Leo

Esports
Aficionado

Mia

VR Explorer

Gaming Communities & Sports Fandom

Gaming is deeply integrated into the daily lives of digital-native fans.

Gamers Today

According to the Newzoo Global Gamer Study 2024, which surveyed over 73,000 consumers worldwide, a significant 80% play video games, 64% view gaming content, and 35% engage in other activities such as listening to gaming podcasts, following esports, discussing games in online communities, and creating content.

Digital-native generations, including Millennials, Gen Z and Gen Alpha, interact with games in more diverse ways than older generations. **For these younger consumers, gaming is deeply integrated into their daily lives.** Gen Alpha and Gen Z players are particularly inclined towards **adventure, fighting, racing and shooting games.**

Gen Z enjoys the games with personalisation opportunities and community aspects. **Among the most popular game franchises are Minecraft, Call of Duty, Grand Theft Auto, Fortnite, EA Sports FC, Candy Crush Sag, Roblox**

and Mario, highlighting the importance of social elements and expansive narratives. Vast open worlds and engaging stories are the main motivators for PC and console players, drawing large audiences.

Gen Alpha enthusiasts spend more time engaging with games than any other activity, averaging 5.2 hours per week on gaming-related activities.¹

Communities

Young video game fans increasingly consider their gaming passion a key part of their identity. These fans are more engaged than casual gamers, often subscribing to paid gaming services and dedicating more hours to playing each week. For them, **gaming extends beyond a hobby. It provides community, socialisation, and a sense of belonging.²**

Several large gaming communities significantly impact



Several large gaming communities significantly impact the industry. **"League of Legends" boasts over 100 million monthly active players, "Minecraft" has more than 130 million, and "Fortnite" has over 350 million registered players.** These communities actively participate in competitions, content creation, and discussions.³ "Roblox", with over 200 million monthly active users, is another notable example. It is a unique platform that allows users to create and share their own games and experiences. The Roblox community is highly creative and diverse, with players of all ages engaging in game development, social interactions, and virtual commerce.⁴

Sports

Statista reports that sports games are among the most popular video gaming genres worldwide, with an annual market size of 21.32 billion US dollars. In 2023, sports

games generated about 10.59 billion US dollars in revenues in the Asia-Pacific region, with North America ranked second at 6.17 billion US dollars. One of the most popular sports gaming series is EA Sports FC, formerly known as the FIFA series, which releases a new version every autumn.⁵

Fantasy sports have also become integral parts of the sports fan experience. Such platforms allow fans to create and manage their teams. This participatory nature of fantasy sports fosters deeper involvement and loyalty among fans. Sports betting is another gamified experience that boosts fan engagement by offering financial rewards, social interaction, and heightened sports entertainment. It encourages fans to leverage their knowledge to predict outcomes and build community around it on social media.⁶



¹ Brune, M. (2024, July 2). Our new gamer research shows that 80% of consumers play video games. Newzoo.com. <https://newzoo.com/resources/blog/our-new-gamer-research-shows-that-80-of-consumers-play-video-games>

² Westcott, K. et al., (2024, March 20). Beyond mass appeal: The untapped potential of fandom. Deloitte Insights. <https://www2.deloitte.com/us/en/insights/industry/technology/digital-media-trends-consumption-habits-survey/2024/fan-loyalty-media-and-entertainment-companies.html>

³ The Rise and Impact of Gaming Communities on the World of Video Games. (2023, August 16). Medium. <https://bvgames.medium.com/gaming-communities-the-rise-and-impact-of-gaming-communities-on-the-world-of-video-games-1fec152f649f>

⁴ Elad, B. (2023, August 2). Roblox Statistics 2024 - By Number of Visits, Platform, Age, Country, Ethnicity and Revenue. Enterprise Apps Today. https://www.enterpriseappstoday.com/stats/roblox-statistics.html#google_vignette

⁵ Global Sports Video Games Revenue by Region 2032 | Statista. (2024). Statista; Statista. <https://www.statista.com/statistics/1450979/sports-video-games-revenue-worldwide-region/>

⁶ Sports Betting: Driver of Fan Engagement for Sports Brands. (2023, September 6). Euromonitor. <https://www.euromonitor.com/article/sports-betting-driver-of-fan-engagement-for-sports-brands>

Meet Leo

Esports Aficionado

• **AGE:** 16 years old

• **Location:** UAE

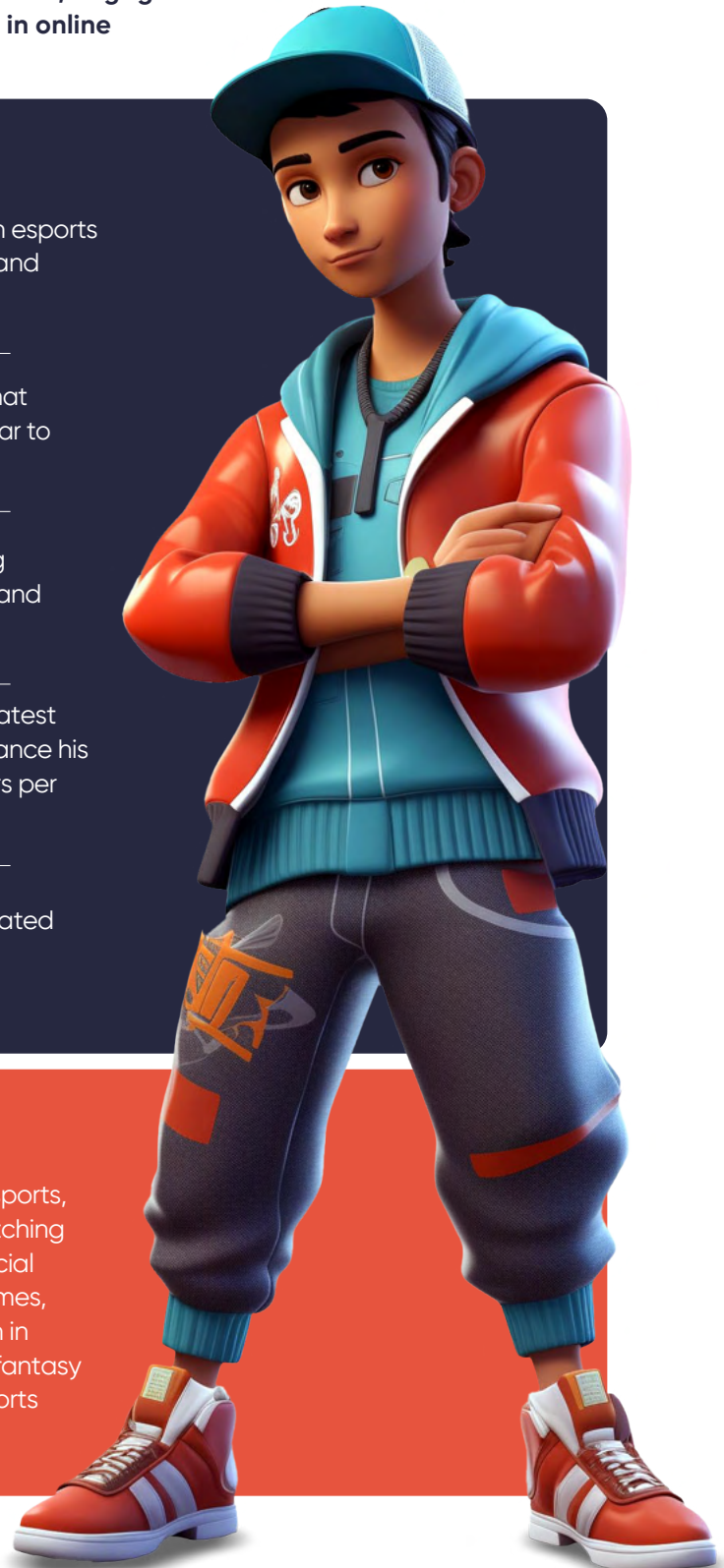
Leo, a 16-year-old gaming enthusiast living in the UAE, is deeply involved in esports. He regularly plays esports with friends, engages with sports-related video games, and participates in online gaming communities.

Key Characteristics:

- ▶ **Esports Engagement:** Follows and participates in esports competitions, keeping up with the latest events and updates in the esports world.
- ▶ **Gaming Experience:** Seeks immersive gameplay that includes social interactions and rich storylines, similar to "Roblox," and enjoys personalising avatars.
- ▶ **Community Involvement:** Active in online gaming communities, sharing tips, discussing strategies, and collaborating with others.
- ▶ **Tech-Savvy and Digital Native:** Leo follows the latest gaming hardware and software updates to enhance his gaming experience. He spends more than 5 hours per week on gaming-related activities.
- ▶ **No-Goes:** Avoids static games and poorly integrated gaming experiences. Prefers games with regular updates, new features and challenges.

Sports Fan Behaviour:

- ▶ In addition to esports, Leo is a fan of traditional sports, often playing football with friends. He enjoys watching live matches and follows sports fan pages on social media. His interest in sports extends to video games, particularly enjoying the realism and competition in titles like "EA Sports FC." Leo also participates in fantasy sports leagues and stays connected with the sports community.



Behind the Passion: Interview with a Sports Fan

Gaming Devotion Meets Sports Fandom



Max*

14-Year-Old Gaming Enthusiast and Football Fan



EA SPORTS FC 25 (Photo: Business Wire)

What games are you playing right now? What are your favourites, and why?

I'm really into Fortnite and FIFA at the moment. Fortnite is my favourite because it's super competitive, and I love that. They also release new updates often, which keeps the game fresh. For example, they're collaborating with Marvel right now, and it brings a lot of new stuff, making it fun to play with friends. FIFA is another one I really like because I'm a big fan of football.

How did you get into these games?

I started playing Fortnite because a lot of my friends at school were into it. They recommended it, so I decided to give it a try, and I've been playing ever since. It's great because we can play together, which makes it even more enjoyable.

How often do you play these games, and what keeps you coming back?

It depends on whether I'm in school or on holiday. During the school term, I usually play about three times a week, but when I'm on holiday, I tend to play every day. Each session typically lasts about one to two hours. As for what keeps me coming back, it is the sense of

achievement. I can always accomplish something in the game each day, whether it's levelling up, completing a challenge, or just having fun with friends. The competitive nature of Fortnite, in particular, really drives me to keep playing.

You mentioned you like competitive games. Are there other types of games that interest you?

Yes, besides competitive games, I'm also into strategy games. They offer a different kind of challenge that I find really engaging. With strategy games, you can plan ahead and think about your moves, which is a different kind of thrill. I also sometimes enjoy single-player games like The Legend of Zelda: Breath of the Wild, but I prefer games where I can share the experience with others. I prefer multiplayer games because you can play with other people.

Do you follow any YouTube channels or streamers about gaming?

Yes, I watch vloggers who stream Fortnite gameplay pretty often. I want to learn from the best and see different strategies to complete challenges.

*Name was changed due to privacy reasons.



Fortnite: Chapter 5

Where do you usually chat with your friends while playing games?

We usually meet inside the game. There are in-game chats where we talk, or we sometimes use WhatsApp.

Turning now towards sports, what role does it play in your life? Do you watch live sports, and how often?

In the summer, I do a lot of sports, like hiking, swimming, and playing football. I also watch live sports, especially football. I'm going to watch the Champions League, and I follow other leagues as well. The frequency depends on whether big tournaments are happening. During the EURO, I was watching every game. I love watching it because I'm a big fan of football, and it's really interesting to see how my favourite teams are performing.

How do you keep up with the stats and scores of your favourite teams? Do you use social media or specific apps for this?

I usually start by checking the highlights, like the best goals from the matches. I have an app that shows me all the stats, like which games were played and the scores. I

don't really use Instagram or other social media platforms for following sports. I prefer to use specific apps and websites for that. And yes, I definitely discuss the results with my friends. We talk a lot about the games, share our opinions, and sometimes debate about different players and teams.

What do you find most exciting when discussing sports with your friends or watching games?

It's the competition that makes it exciting. It's fun because not all of us cheer for the same club, so there's always a bit of friendly competition in our conversations. It's interesting to see different perspectives and learn from each other.

Do you participate in fantasy sports? How does that impact your connection to the players and the games?

Yes, I do. It's fun and really strategic. It's cool to pick the right players and see how they perform. I feel a bit stronger connection to the players I choose in fantasy sports. It makes me follow their progress more closely, and I get excited when they do well.

“

I absolutely love the vibe of sports communities where everyone feels included. It's so refreshing to connect with others who share the same passion, and that really makes the experience special for me.



Marc

31-Year-Old Basketball Supporter
from Algeria

Meet Sophia

The Social Media Maven

- **AGE:** 19 years old
- **Location:** Germany

Sophia is a 19-year-old social media enthusiast from Germany with a particular passion for sports. She runs a small but growing blog on Instagram, where she shares content related to sports events and actively engages in discussions.

Key Characteristics:

- ▶ **Social Media Guru:** Stays online at least 4 hours a day, using platforms like Instagram, TikTok, and Snapchat, often experimenting with new features. She keeps up with the latest online trends and experiment with creating new ones.
- ▶ **Community Focus:** Actively participates in sports-related online communities, using social media to connect with other fans globally. She values the sense of belonging these communities give her.
- ▶ **Interactive Approach:** Sophia understands that social media is not just a tool for passive consumption but a space for active interaction and community building. She enjoys creating content and always reply to comments.
- ▶ **No-Goes:** Dislikes any experiences that feel disconnected or lack community involvement. Sophia prefers platforms and content that promote a sense of unity among fans, ignoring anything that feels too corporate or impersonal.

Sports Fan Behaviour:

- ▶ Sophia is a passionate sports fan, especially when it comes to tennis. She regularly watches live matches and never misses the major tournaments. On social media, she closely follows her favourite players and teams, with a keen interest in the behind-the-scenes aspects of athletes' lives, their recommendations and insights. Sophia is always active in the comment sections and creates videos highlighting key moments from games, often collaborating with other micro-influencers.



Fan Engagement in the Social Media Age

Social media shifts fan culture from passive consumption to active interaction, blurring the line between producers and consumers.

A survey by Morning Consult involving 1,002 Gen Z individuals, aged 13 to 26, reveals that **around a third of young users spend over four hours a day on social media**. YouTube is the leading social media platform, with over 80% of respondents using it. Instagram, TikTok, and Snapchat also rank highly in popularity.

Notably, more male respondents favour platforms such as YouTube, X, Discord, Reddit, and Twitch. Conversely, female users prefer spending time on Instagram, TikTok, Snapchat, and Facebook. Despite its lesser usage, BeReal still gets some attention from Gen Z.¹

Youth primarily consider internet a source of entertainment and social connection, with a particular preference for video content. This differs from Millennials,

Gen X, and Boomers, who mainly use the internet for information access. Additionally, Gen Z users view online entertainment as interactive and are adept content creators themselves. **They feel comfortable being creators and actively work on building their personal digital brands by sharing content online.**²

For young sports enthusiasts, online communities play a crucial role in their fandom. These platforms enable fans to connect with others worldwide, especially during major sports events like the FIFA World Cup. **Whether they are watching from home or attending live, Gen Z sports fans seek interaction as an integral part of their experience.** Typically, when watching live sports from home, they prefer to do so with others.³ **Being digital natives, younger generations express their**



emotions online and engage with fellow fans before, during, and after sports events. Gen Z is leveraging technology to broaden their communities and deepen their sports fandom. Approximately half of Gen Z fans report using social media to either read or share opinions while watching live events from home. Recently, X revealed impressive statistics from the weekend of July 13-14, 2024, highlighting how fans, brands, commentators, and athletes interacted on the platform during the conclusion of several major international sports tournaments. This engagement led to significant interaction,

with 10.5 billion impressions, 27.4 million posts, and 7.1 million unique authors.⁴ **Being part of a community is vital for sports fans, as they receive a sense of belonging, confidence, and well-being.** When building a community on social media, brands and sports clubs must acknowledge and interact with fans, share personal stories, and provide exclusive content that fans can relate to. Through personalising experiences and online communities, brands, creators, celebrities, and fans deepen connections because every fan feels seen, valued, and engaged in a relationship with other like-minded enthusiasts.⁵



¹Thomas, M. (2024, February 2). Where Does Gen Z Spend Most of Their Time Online? Later.
<https://later.com/blog/gen-z-social-media-usage/>

²Generation Influence: Reaching Gen Z in the New Digital Paradigm. (2024, January 5). WP Engine.
https://wpengine.com/resources/gen-z-2020-full-report/#A_cohort_of_creators_tainment-companies.html

³Giorgio, P., Jarvis, D., Auxier, B., Bobich, H., & Harwood, K. (2023b). 2023 sports fan insights: The beginning of the immersive sports era. Deloitte Insights.
<https://www2.deloitte.com/us/en/insights/industry/media-and-entertainment/immersive-sports-fandom.html>

⁴Piovesan, B. (2024). A Massive Sports Weekend For The X Books. X.com.
<https://business.x.com/en/blog/summer-of-sports-2024-massive-weekend-on-x.html>

⁵Phillips, R. J. (2023, June 16). Council Post: Building Genuine Connections: The Role Of Technology In Cultivating Fan Engagement. Forbes.
<https://www.forbes.com/sites/forbestechcouncil/2023/06/16/building-genuine-connections-the-role-of-technology-in-cultivating-fan-engagement/>

“

I see sports as a powerful way to drive change. I'm inspired by athletes and teams that aren't afraid to speak up. It shows they genuinely care about more than just the game.



Tanya

20-Year-Old Tennis Player
from Australia

Meet Usman

The Social Justice Champion

• **AGE:** 24 years old

• **Location:** Nigeria

Usman is a 24-year-old activist from Nigeria who supports social justice and environmental sustainability. As a student, he actively participates in campus and online campaigns that support these causes. He follows athletes and teams that advocate for such issues, aligning his fandom with his strong moral values.

Key Characteristics:

- ▶ **Values-Driven:** Usman prioritises athletes and teams vocal about inclusivity and sustainability, supporting those who use their influence on champion causes like climate change and equality.
- ▶ **Active Engagement :** He regularly participates in discussions, protests, and digital activism. He uses social media to spread awareness and collaborate with like-minded individuals, ensuring his voice contributes to the larger movement for change.
- ▶ **Community Involvement:** Usman collaborates with others to organise events and volunteer for projects that align with his values. He also regularly consumes news and literature and attends events that deepen his understanding.
- ▶ **Informed and Selective:** He is well-informed about global issues and supports brands and teams that genuinely commit to social causes, denying those he perceives as inauthentic.

Sports Fan Behaviour:

- ▶ Usman expects sports organisations and athletes to promote social responsibility and inclusivity. He supports teams and athletes who take action in these areas. Usman prefers brands that align with his values and is more likely to engage with sponsors committed to these causes. He stays connected with his favourite teams through social media, where he follows their social and environmental initiatives.



Social Responsibility & Fandom

Awareness of climate change, sustainability, and social justice issues is growing among global sports fans.

According to YouGov Global Profiles data, over half of sports fans globally identify as environmentalists. Additionally, nearly half are willing to pay more for sustainable energy, indicating a strong commitment to environmental causes. **Sports fans generally show a greater concern for these issues compared to the global population, particularly when it comes to supporting companies with a social conscience.** When examining British sports fans, younger generations, particularly Gen Z, are significantly more likely to prioritise climate change and green energy than older age groups. For example, 18–24-year-olds are twice as likely as those aged 55 and older to consider these issues as top concerns.

Diversity and inclusion are also key issues for sports fans worldwide. About 65% of sports fans believe that diversity and inclusion should be prioritised when organising events, and 68% agree that sports need to become more inclusive. This sentiment is consistent across age groups, although female sports fans are more likely than males to support these values. The strongest support for diversity and inclusion comes from sports fans in Italy, Argentina, Indonesia, and Germany.

Equal pay for athletes is another significant concern among global sports fans. Over two-thirds agree that athletes' salaries should be based on skill rather than gender, and more than half believe that the FIFA Women's World Cup winner should earn the same as the men's.

Additionally, 56% agree that prize money should be equal for male and female tennis tournaments. These views are slightly more prevalent among female fans.

Socially conscious sports fans, who represent two-thirds of the global fan base, desire more than just entertainment from sports and the brands they support. **They prefer brands that align with their values, particularly in areas like social responsibility.** These fans are more likely to notice and engage with sponsors who demonstrate a commitment to social causes.¹

A 2020 Altman Solon survey involving over 5,000 U.S. participants found that **nearly half of people think professional athletes should use their fame to raise awareness about social and racial issues.** The survey also highlighted a strong public desire for athletes and sports organisations to play a more significant role in conversations about racial justice. Younger people, mainly those aged 18–34, are especially supportive, with 53% agreeing that **athletes should speak out on these issues.** This strong support among younger generations suggests that athlete activism is likely to grow in popularity.²

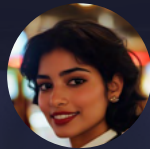
Global sports fans, particularly younger supporters, expect sports organisations and athletes to lead by example in social responsibility and inclusivity. They favour brands that share their values and growing concerns about sustainability and justice globally and in sports.

¹Global sports 2022: Uncovering the socially responsible sports fan. (2022). YouGov.

²Solon, A. (2020, September 9). U.S. Public Supports Pro Athletes' Activism. AltmanSolon.com. <https://www.altmansolon.com/insights/nba-social-justice-sports-survey>

“

I've got a bunch of fitness apps on my phone, and they really make my workouts a lot more fun. I always check the leaderboards and seeing how my friends are doing. Each training session feels like a new challenge, and I really enjoy that!



Amina

21-Year-Old Fitness Lover
from Turkey

Meet Carlos

The Fitness Buff

- **AGE:** 17 years old
- **Location:** Brazil

Carlos is a 17-year-old high school student from Brazil who is passionate about fitness and maintaining an active lifestyle. Beyond his involvement in school sports teams, he uses technology to monitor and improve his performance, frequently comparing his fitness stats with others in the sports community.

Key Characteristics:

- ▶ **Active Participant:** Carlos is deeply involved in his school's sports teams, often taking on leadership roles like team captain. He incorporates various exercises into his routine, aiming to excel in sports while maintaining overall physical health.
- ▶ **Fitness Apps and Wearables:** He regularly uses fitness apps and wearable devices to track workouts, monitor heart rate, and analyse performance. Apps like Strava and Nike Training Club help him set and achieve his fitness goals.
- ▶ **Data-Driven Training:** Carlos optimises his training regimen using data from his wearables, adjusting his diet and workouts to enhance performance.
- ▶ **Social Integration:** He actively participates in online fitness communities, sharing progress and competing with peers globally, which keeps him motivated and engaged.
- ▶ **Interactive Tools and Gamification:** Carlos prefers fitness tools that offer real-time feedback and gamified elements, such as earning badges and competing on leaderboards, making his workouts engaging and competitive.
- ▶ **No-Goes:** Carlos quickly loses interest in any fitness platform or wearable without interactive and engaging features. Devices that don't adapt to his progress or offer a sense of accomplishment do not hold his attention for long.

Sports Fan Behaviour:

- ▶ While Carlos is deeply involved in his athletic pursuits, he is also an avid fan of professional sports, particularly Formula 1. He closely follows his favourite teams, players, and racers, using sports apps to stay updated on scores, stats, and news, further fuelling his passion for sports.



Sports Engagement with Wearable Tech

Wearable technology transforms sports, enhancing athlete performance, and deepening fan engagement through interactive experiences.

Wearable computing devices have grown substantially in recent years, primarily driven by increased consumer health awareness. The 2024 ACSM annual survey, which gathered insights from nearly 2,000 fitness professionals, highlighted wearable technology as the top trend, reflecting a strong consumer interest in personal health data and fitness tracking.¹ **Thus, approximately 30% of Generation Z and 27% of Millennials own a wearable device, such as a smartwatch or fitness tracker.** These adoption rates are higher compared to older generations, indicating Gen Z's comfort and familiarity with digital technology.²

Wearable Tech in Sports

Wearable technology, ranging from wristwatches to Mixed Reality headsets, significantly impacts how young people engage in sports as participants and spectators. These devices monitor health metrics like sleep patterns, exercise, and heart rate. They enhance athletic perfor-

mance and transform sports fandom among younger audiences.³

Advanced sensors in these devices provide athletes and coaches with detailed data on key performance metrics, such as heart rate, acceleration, and movement. This data helps optimise training, identify weaknesses, and track progress. For instance, heart rate monitors track breathing and pulse, while gyroscopes and accelerometers measure location and speed, crucial for sports like football. GPS systems track distance for cyclists and runners, and sleep monitors aid recovery.

Beyond data collection, wearable technology enhances performance by allowing athletes to adjust their training over time. These devices also often connect users via software, enabling athletes to find training partners, compare metrics, and compete. Advanced applications like VR training sessions refine skills by simulating real-life scenarios.⁴



Influence on Sports Fandom

Wearable technology also significantly influences how young people engage with sports as fans. Initially used by athletes to boost performance, smart wearables are now embraced by fans to deepen their connection with the sports they love. **These devices provide real-time updates, live scores, and notifications directly on the wrist, making it easier for young fans to stay connected with their favourite teams and athletes.** For example, a device like Footrax can sync with players on the field, allowing fans to compare their own activity with that of

their favourite athletes, enhancing their involvement.

This technology blurs the lines between spectator and participant, enabling fans to track player movements, analyse performance, and engage in virtual challenges. The integration of sports analytics into wearables offers fans detailed insights into the game, enriching their understanding and enjoyment. Many wearables also feature social sharing options, allowing young fans to share their fitness achievements or game-day experiences with friends and online communities. This social aspect fosters a sense of community among young sports enthusiasts, deepening their connection to the sports they love.⁵



¹ Wearable fitness technology: A top trend in 2024. (2023, December 28). IFA Berlin 2024. <https://www.ifa-berlin.com/news/wearable-fitness-technology-top-trend-2024>

² PYMNTS. (2023, April 17). Gen Z Leading the Health-Related Wearable Revolution. [www.pymnts.com](https://www.pymnts.com/news/wearables/2023/gen-z-leading-the-health-related-wearable-revolution/). <https://www.pymnts.com/news/wearables/2023/gen-z-leading-the-health-related-wearable-revolution/>

³ Technavio. (2024). Wearable Computing Devices Market Analysis - Size and Forecast 2024-2028. [Technavio.com](https://www.technavio.com/report/wearable-computing-devices-market-industry-analysis). <https://www.technavio.com/report/wearable-computing-devices-market-industry-analysis>

⁴ CogniteQ. (2023, March 3). How Wearable Technology Is Changing the Sports Industry. [Www.cogniteq.com](https://www.cogniteq.com/blog/how-wearable-technology-changing-sports-industry). <https://www.cogniteq.com/blog/how-wearable-technology-changing-sports-industry>

⁵ Doshi, S. (2023, September 26). Beyond fitness: How are smart wearables enhancing the fan experience in sports events? Medium. https://medium.com/@sneh_24893/beyond-fitness-how-are-smart-wearables-enhancing-the-fan-experience-in-sports-events-743499563e16

Virtuality & Youth Involvement

VR has strong potential with Gen Z, who are likely to drive its mainstream adoption for entertainment and socialising.

The rapid progression of technology, including advancements in graphics, Artificial Intelligence, and Virtual Reality, has enabled developers to create highly realistic and immersive experiences.¹ However, while Gen Z often leads in adopting new technology, their actual use of VR is still low. High costs, a preference for more accessible technologies like smartphones and gaming consoles, and insufficient variety or ease of use in available content remain barriers to VR technology adoption.²

Despite these challenges, there is optimism about the future of the VR market. Tech giants like Meta and Apple are developing advancements that could overcome these barriers, potentially making VR more appealing and practical. If VR technology aligns with Gen Z's preferences for seamless and engaging experiences, it could become a mainstream tool for entertainment and social interaction.³

Gen Z representatives are characterised as experience-driven, digitally native, entrepreneurial-minded, and oriented to meaningful connections. They continuously seek the latest innovations, favouring businesses that adapt to market technological trends.⁴ **About 40% of Gen Z have tried VR, showing interest in gaming, virtual**

events, and education. Their engagement includes immersive gaming, attending virtual concerts or events, and using VR for educational purposes. **Gen Z shows curiosity about this because, for many of them, it provides a new level of interaction and entertainment that traditional media cannot achieve.**⁵ Deloitte's research proves clear interest among younger fans in various VR sports experiences. **Around 70% of Gen Z and Millennial fans interviewed expressed interest in at least one of six proposed VR sports activities.** These include playing VR sports games, experiencing live events from an athlete's perspective, virtually attending live events, and sharing the experience with friends and family.⁶

Young fans' significant online presence on platforms like Instagram, TikTok, and Discord indicates the potential for VR as a social tool. Enhanced VR experiences could offer immersive environments for real-time connections, making virtual hangouts, events, and gaming sessions more engaging and dynamic.⁷ According to the Social Identity Theory (SIT), fans derive a sense of belonging from their association with their sports team, which influences their behaviour and attitudes. Virtual Reality presents new opportunities that can offer exclusive virtual experiences that strengthen fans' identity and community ties.⁸

¹Virtual Sports Market Size, Share & Growth Report, 2030. www.grandviewresearch.com/industry-analysis/virtual-sports-market-report

^{2,3,5,7}VR and Gen Z: The Gap Between Curiosity and Usage | Tech. (2024). Wokewaves.com. <https://www.wokewaves.com/posts/gen-z-vr-potential-challenges>

⁴Francis, T., & Hoefel, F. (2018, November 12). "True Gen": Generation Z and Its Implications for Companies. McKinsey & Company. <https://www.mckinsey.com/industries/consumer-packaged-goods/our-insights/true-gen-generation-z-and-its-implications-for-companies>

⁶Giorgio, P. et al., (2023). 2023 sports fan insights: The beginning of the immersive sports era. Deloitte Insights. <https://www2.deloitte.com/us/en/insights/industry/media-and-entertainment/immersive-sports-fandom.html>

⁸Chohan, R., & Schmidt-Devlin, E. (2023). Sports fandom in the metaverse: marketing implications and research agenda. Marketing Letters. <https://doi.org/10.1007/s11002-023-09702-6>

Meet Mia

VR Explorer

• **AGE:** 22 years old

• **Location:** USA

Mia, a forward-thinking 22-year-old student, is passionate about technology and sports. She explores AR and VR features integrated by brands during live events and has recently acquired her first VR headset. She is thrilled about participating in immersive experiences.

Key Characteristics:

- ▶ **VR/AR Usage:** Mia would like to use VR headsets to watch live sports events and engage with interactive features and games that enhance the viewing experience. She is enthusiastic about the future of mixed-reality devices and features, anticipating advancements in VR technology.
- ▶ **Content and Engagement Preferences:** Demands high-quality, interactive content that surpasses traditional viewing methods. She expects to feel part of the action and to have access to features like multi-angle viewing, behind the scenes and immersive interactions.
- ▶ **Community:** Actively participates in virtual events, competing and interacting with fans globally from her room. She seeks to connect with other fans and stay updated with the latest trends, fostering a sense of community.
- ▶ **No-Goes:** She prefers dynamic and engaging experiences that make her feel involved in the event, denying traditional, passive, and non-interactive forms of engagement.

Sports Fan Behaviour:

- ▶ Mia is deeply engaged with her favourite teams and players. VR technology allows her to experience sports from multiple perspectives, enhancing her emotional connection and loyalty to her teams. She supports the idea of using VR to make sports more accessible for fans globally.



Behind the Passion: Interview with a Sports Fan

Immersive Sports Experiences and Fandom



Lila*
23-Year-Old Passionate about VR and Sports



What role do sports play in your daily life? How much are you involved?

Sports play a significant role in my life. I'm either doing sports daily or watching them. I watch between 10 to 15 football matches a week, including the Champions League and various national divisions from Austria, Germany, England, and Spain. I also have football training twice a week and do CrossFit four times a week. Additionally, my job involves many sports-related activities. It's hard to imagine a week without sports in some form or another, as it has become such an integral part of my daily routine.

How often do you watch live sports tournaments, and what do you enjoy most about them?

I watch live sports quite often. What I enjoy most is the sense of honest competition and the unpredictable outcomes. There's always a chance for an underdog to win, and those moments are exhilarating. The narrative and emotional stories behind each game, the athletes' strategies, and the narrative and emotional stories behind each game make it all the more enjoyable. With social media, following sports

has become more interactive, and I feel more connected to the players and tactics.

Have you ever tried Virtual or Extended Reality glasses before? What was your experience like?

I've tried several VR and XR experiences, mostly related to sports. One of the most memorable experiences was watching NBA basketball using the Apple Vision Pro. The ability to switch between multiple viewing angles and fully immerse myself in the game was fantastic. I've also played VR tennis and handball, which gave me realistic experiences without having to book a court or find an opponent. It's a great way to stay engaged with the sports I love.

How do you think the experience of watching sports in VR compares to watching it on TV or in real life?

Watching sports in VR provides a much more immersive experience compared to TV, because you can make the screen larger and explore different camera angles. The feeling of being immersed in the action is much stronger. However, the downside of VR is that it

*Name was changed due to privacy reasons.



can feel a bit isolating since you're watching alone. In real life, you get the emotional energy of the crowd, which is something VR can't yet replicate, though it's getting better at creating a more intimate experience.

Which sport would you like to try using VR glasses?

I've tried VR tennis, which was a lot of fun, but I'd love to see other sports in VR as well, such as basketball or even Olympic events like swimming. Football might be trickier to adapt to VR due to the reliance on feet rather than hands, but I think sports that involve throwing or shooting, like baseball or basketball, would be well-suited to the VR environment. The range of possibilities with VR is exciting.

Apart from watching sports, what other activities in VR would you find interesting?

Virtual meet-and-greets with players and coaches would be an interesting concept. It would be amazing to tour famous stadiums like Camp Nou or Santiago Bernabeu from a first-person perspective, or even experience a pitch-side view during a game. Outside of sports, VR gaming would be great, with games like Fortnite or Far Cry providing a unique first-person experience that could be highly engaging.

How do you currently follow your favourite teams, and do you think VR could help you feel more connected to them?

I follow my favourite team, Barcelona, mainly through social media and streaming services. Unfortunately, I've never had the chance to watch them live in person. VR could absolutely help bridge that gap for fans like myself who live far away from their favourite teams. It would allow me to feel closer and more connected to the action on the field. For those who may never get the chance to visit a stadium in person, VR could offer a way to feel like they are part of the atmosphere.

How do you connect with other fans online, and could VR potentially influence that?

Currently, I connect with fans through specific social media groups where we discuss formations, players, and coaching strategies. It's mostly about exchanging knowledge, not necessarily building friendships. VR could add a personal touch to these interactions, making them feel more real and less anonymous, which might help curb some of the harsher online behaviour we often see. It could also foster more meaningful discussions by making it feel like you're talking face-to-face.

CHAPTER 3

Insights & Innovation Cases

Introduction

Innovative efforts and successful campaigns by forward-thinking entities are transforming the sports industry.

Technological advancements and innovations are reshaping all industries, including sports. AI, Machine Learning, Augmented Reality, Virtual Reality, Blockchain, and more are becoming widely used, with many successful implementations by forward-thinking companies. Clubs, leagues and sports-related brands use these technologies to enhance their competitive edge, deliver additional value to fans and users, and create deeper connections. Fans are evolving from spectators into active participants, engaging with their favourite teams in unprecedented ways. This transformation brings fans closer to their heroes, creating a more immersive experience and opening new avenues for interaction.

In this part of the report, we highlight the pioneering efforts of companies, brands, and sports clubs that have boldly innovated within the sports entertainment and

fandom arenas. We showcase their creative applications, share the results of their innovative campaigns, and provide insights on how these advancements elevate fan engagement to new heights.

Additionally, we bring expert perspectives from the fields of sports, innovation, networking, consulting, marketing, and modern social media. These thought leaders offer their experiences, advice, and visions for the future of sports at the nexus of technology and fan engagement.

Through captivating discussions with experts and case studies, we aim to discover how technology can help transform the traditional approach to fan interaction and stay ahead of the curve in the dynamic world of sports entertainment.



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Trends & Future Outlook

Digital Transformation in Sports

Disruptive technologies and data science methods open new markets for sports science and the industry.¹

As data becomes the new currency in sports, clubs that invest in smart venue concepts, digital fan engagement and B2B platforms stand to gain a competitive edge.²

Deloitte points out that innovative technologies and new ways of engaging with entertainment are opening up fresh avenues for the sports sector. This includes options like making instant bets on mobile, experiencing games in VR from a player's perspective, purchasing exclusive event merchandise directly through streaming platforms, or sharing tailored stats on social media.³ IMG forecasts several technological trends poised to redefine the sports industry in 2024, calling it the onset of the internet's "third age." Among the key ones are:⁴

Generative AI's Rise

Generative AI's swift adoption revolutionises how sports organisations engage with fans and explore new revenue paths. AI tools, known for their user-friendly interfaces, are becoming indispensable for creating innovative content and analyzing extensive data sets.

Redefining 'Social Media'

The term 'social media' is becoming obsolete in sports

engagement, making way for more personalised, interest-based digital interactions. This shift towards private and tailored content delivery is redefining fan engagement strategies.

Smart Stadium Experiences

Smart stadiums and digital engagements are setting new standards for live sports experiences, leveraging IoT to enhance fan satisfaction and boost the club's revenues. The key to unlocking these benefits lies in strategic tech investments.

The Time for Personalisation

Personalisation is transitioning from an additional benefit to a critical necessity in sports, driven by the demand for tailored fan experiences. This trend responds to the diverse preferences of modern audiences, ensuring sports remain appealing across all demographics, especially for Gen Z and their successors, Gen Alpha.



¹Schmidt, S. L. (2020). 21st Century Sports : How Technologies Will Change Sports In The Digital Age. Springer.

²Ratten, V., & Springerlink (Online Service). (2019). Sports Technology and Innovation : Assessing Cultural and Social Factors. Springer International Publishing.

³2023 sports fan insights: The beginning of the immersive sports era. (n.d.). Deloitte Insights. Retrieved March 9, 2024, from <https://www2.deloitte.com/uk/en/insights/industry/media-and-entertainment/immersive-sports-fandom.html/#fandom>

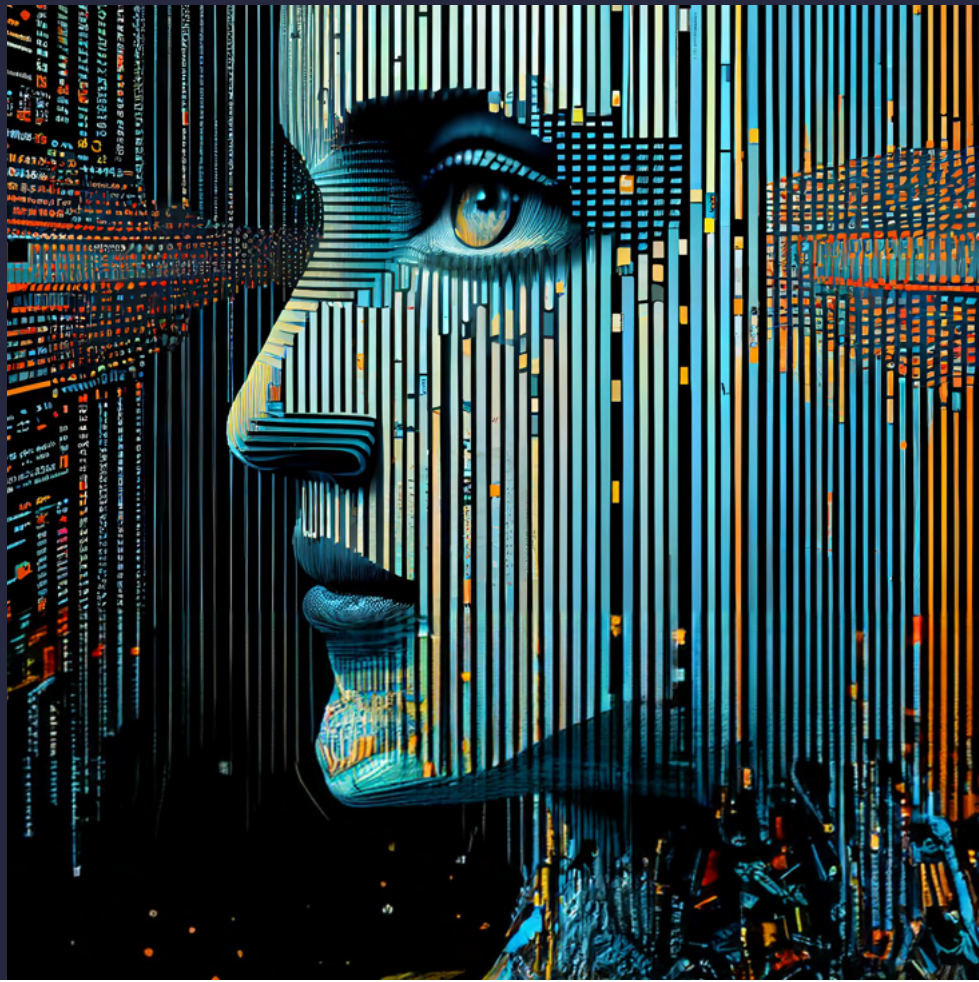
⁴Digital Trends 2024. (n.d.). IMG. Retrieved February 26, 2024, from <https://www.img.com/sports/services/digital/digital-trends-report>

Pioneering Perspectives

A chat with AI: a glimpse into the trends



ChatGPT-4
OpenAI



What technological advancements present the biggest potential in sports, why?

Wearable technology is playing a crucial role in sports by providing devices that track athlete performance, health metrics, and biomechanics, offering coaches and trainers real-time data to optimise training and reduce injury risks. This technology not only enhances athlete performance but also engages fans by offering deeper insights into their favourite athletes' performance. Additionally, **augmented and virtual reality (AR/VR)** are transforming fan experiences by providing immersive viewing options, allowing fans to experience games from perspectives previously inaccessible, such as from a player's viewpoint or exclusive stadium vantage points. **Artificial intelligence** and **machine learning** are also being used to enhance game strategies, player scouting, and injury prevention, personalising content delivery for fans and improving interactions with sports brands through chatbots and recommendation systems. **Blockchain technology** is increasingly used for ticketing to combat fraud and for creating unique fan experiences through NFTs, which allow fans to own digital memorabilia and foster a new form of engagement. This synergy of technology and sports is not only driving innovation within the industry but also contributing to a more connected and interactive global sports community.

What are the current leading trends that are shaping the sports fan engagement?

What are the current leading trends that are shaping the sports fan engagement? The top trends in sports fan engagement include **personalisation through big data**, utilising data analytics to offer tailored fan experiences such as customised content feeds, targeted advertising, and personalised game day experiences. The rise of **esports and interactive competitions** has introduced a new dimension to fan engagement, involving fans not only in watching but also in participating. **Enhanced mobile experiences** through sophisticated sports apps offer everything from live streaming and VR experiences to in-game betting and social features that allow fans to interact during live events. Moreover, **inclusive and community-focused initiatives** engage diverse fan bases with initiatives catering to different demographics, promoting inclusivity and community building through sports. **Social media platforms** also play a critical role, enabling real-time engagement and content sharing, which helps build a sense of community and connection among fans. Furthermore, **sustainability and social responsibility** are becoming increasingly important, with sports organisations implementing eco-friendly practices and supporting social causes, which resonates with socially conscious fans. In conclusion, the evolution of



sports fan engagement is marked by a dynamic interplay between technological innovation, community-building initiatives, and a growing emphasis on sustainability and social responsibility, shaping a more immersive, inclusive, and socially conscious landscape for sports enthusiasts worldwide.

What specific approaches are effective in engaging younger sports fans who are digital natives?

Effective approaches for engaging younger sports fans who are digital natives include several innovative strategies. One key approach is **gamification**, which incorporates game elements into the fan experience. This can include fantasy sports, predictive gaming, and rewards systems, all of which appeal to the gaming inclinations of younger audiences. **Social media integration** is also crucial. Utilising platforms where young fans are active, such as TikTok and Instagram, with content that is quick, entertaining, and interactive is essential. This can include challenges, behind-the-scenes content, and collaborations with influencers.

Offering **interactive VR experiences** related to sports events is another effective method. These technologies attract younger fans who seek immersive content.

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The rise of esports and interactive competitions has introduced a new dimension to fan engagement, involving fans not only in watching but also in participating.

Additionally, **content snackability** is important. Younger audiences prefer concise, engaging content like highlights, memes, and short videos over traditional long-form content. **Community platforms** that allow young fans to express their identity are particularly resonant. These can include fan-created content, forums for interaction, merchandise customisation, and interactive elements such as live polls and Q&A sessions during games. Creating **exclusive digital content**, such as behind-the-scenes footage or player interviews, can also foster a deeper connection between young fans and their favourite sports personalities.

Innovation Spotlight: ChatGPT-4 Picks

VR, AR, AI and Blockchain stories redefining sports

Technologies like platforms for immersive viewing, AI for performance analytics, and blockchain for secure ticketing enhance sports experiences.

Virtual Stadium Experiences

NextVR and LiveLike VR: These platforms offer fans the opportunity to experience live games in VR, providing various virtual vantage points from which they can watch the action, almost as if they are present in the stadium. For instance, during the NBA games or NFL matches, fans can choose different camera angles and even sit "courtside" from the comfort of their homes.

AR-enhanced Viewing and Merchandising

NBA AR App: The NBA has developed an AR application that allows fans to view player statistics and live animations overlaid onto the game when viewed through their device. This kind of real-time data overlay enhances understanding and engagement during live games.

Philadelphia Eagles AR Tickets: The Philadelphia Eagles implemented AR features on their game tickets, allowing fans to scan their ticket with their smartphones to watch exclusive content, like highlight reels or messages from players.

Performance Analytics and Fan Engagement

IBM Watson in Tennis: At Wimbledon, IBM Watson is used to analyse game footage to quickly generate highlights, gauge crowd noise levels to determine point excitement, and provide predictive analytics on game outcomes. This AI-driven insight provides a richer, more engaging broadcast and media presence.

AI Chatbots for Customer Service

Many sports teams use AI-driven chatbots on their websites and social media platforms to handle ticket sales, provide information, and engage with fans 24/7, enhancing the overall customer experience and relieving human staff for more complex interactions.

Ticketing, Merchandising, and Fan Loyalty Programs with Blockchain

Socios.com and Fan Tokens: Utilising blockchain technology, platforms like Socios.com allow fans to buy fan tokens that provide voting rights in club decisions, exclusive promotions, and unique engagement opportunities. This use of blockchain fosters a new level of fan interaction and loyalty.

Blockchain-based Ticketing

Teams like FC Barcelona and Juventus have explored blockchain for ticketing to combat fraud and scalping, ensuring that tickets are authentic and transparently sold. This technology also allows for easy resale and transfer of ownership in a secure manner.



“

Fan engagement is crucial for the growth of any sport, and technology is the bridge that connects us to our supporters in new and exciting ways.

Whether it's through social media, virtual experiences, or interactive platforms, technology allows us to share our journey, celebrate our successes, and build a stronger, more connected community with our fans.



Carina Wenninger

Austrian Professional Football Player



Extended Reality: Redefining the sports business landscape



Tibor Mérey
Managing Director & Partner,
Vienna
(Global Leader Web3,
IoT and Extended Reality)



Filip Sokolowski
Lead Knowledge Analyst,
Frankfurt
(TMT – Media)



Brandon Johnson
Senior Knowledge Analyst,
New York City
(TMT – Media)



Marcus Pinnau
Senior Research Analyst,
Madrid
(TDA – Tech Innovation)

How will new technologies, like virtual reality (VR) and augmented reality (AR), redefine the fan/user experience over the next few years?

New technologies like AR and VR are set to revolutionise the fan and user experience in several impactful ways. AR enhances engagement by overlaying digital information onto physical environments, creating richer, more interactive experiences. For instance, the FIFA+ app allowed fans at the 2022 World Cup to see live player stats by scanning the pitch with their smartphones. Additionally, AR can improve efficiency; Telstra, Google, and Accenture's 5G-powered AR wayfinding at Marvel Stadium streamlined fan navigation. AR also opens new revenue streams through novel monetisation and advertising opportunities. Finally, VR allows fans to become athletes – apps like Reakt or Player 22 provide players with training routines and real-time feedback to perfect their technique.

In summary, AR and VR offer a new immersive channel for brands to engage with fans and provide exciting new ways to enjoy their favourite sport.*

How can brands, clubs and sports teams keep things real and relatable for fans as they move

more into virtual spaces? How can we make it easier for them to start using these new technologies?

Filip Sokolowski: It is crucial for brands, clubs, and teams to maintain their identity while expanding into AR, VR, and virtual worlds. This requires cooperation between all stakeholders to ensure brand safety when creating rich virtual experiences, especially as AR, VR, and 3D are new territories for many brand and marketing teams. From a consumer perspective, these technologies open entirely new worlds and experiences (e.g., owning NFT moments of players, loyalty programmes with earn and burn mechanisms, community building, ticketing, or 360VR streaming from the sidelines of the pitch, or AR stadium navigation).

To facilitate this transition, AR, VR, and Spatial Computing can be seen as the new "responsive" design paradigm, similar to when mobile internet first became popular. Initially, publishers needed to adapt their desktop experiences to mobile devices. In the future, AR, VR, and Spatial Computing will be the premier experiences on headsets, which will then be simplified for desktop and mobile devices. In Web3, it is critical to onboard non-Web3 natives by providing easy and



secure experiences and payment gateways (e.g., converting fiat currency to cryptocurrency).

What's your take on the balance between traditional sports viewing and these new virtual experiences?

Brandon Johnson: AR and VR experiences won't replace the stadium experience any time soon – just think of the smell of fresh grass and the fans cheering. However, AR and VR hardware and software are becoming more widespread, better, and more affordable for brands, clubs, and fans by the day. AR and VR can expand the stadium experience beyond its physical boundaries, **offering more seats to those who can't attend and enriching the experience both in-stadium and at home.** In sports, AR and VR are like the rear driving camera in a car: super cool and helpful for some situations, but not replacing the full driving experience for now.

How do you see brands, clubs and sports teams monetising their new digital and virtual offerings?

Brands, clubs, and sports teams have numerous opportunities to monetise their digital and virtual offerings through both **Extended Reality**, and **Web3**.

In the realm of Extended Reality (XR), brands can **boost awareness and lead generation**, using virtual worlds to engage digital natives and younger audiences. For example, Fortnite and Roblox alone have about 30 and 58 million active daily users respectively, each averaging around 2-3 hours per day on the platform.

Furthermore, brands can **enhance the e-commerce experience**, using Extended Reality for improved product visualisation and trial. Back in 2017, Bayern Munich rolled out an augmented reality "real-life jersey configurator" to spur kit sales. A study by Nielsen Sports highlights that fans who engage with AR content are 56% more likely to attend games and 67% more likely to purchase team merchandise.

XR enables new business models, as it allows brands to

experiment with selling virtual and hybrid-reality products. Nike's NFT collections have reached a secondary resale transaction volume of 370,000 ETH (equivalent to hundreds of millions of dollars). Brands like Fiat have embraced the metaverse as an additional channel, allowing customers to interact with scale models and purchase vehicles in a virtual showroom – similar could be imaginable for sports equipment and events.

Web3 similarly includes several unique features that can expand a brand's digital ecosystem. **Tokenisation and Smart Contracts** allow brands to use tokens to gamify interactions, track engagement, and reward loyalty. Starbucks "Odyssey" token loyalty programme, for example has gained 35,000 members and generated over a million dollars in revenue – all while still being in beta.

The 2023 F1 Grand Prix in Monaco was the first major sporting event to feature **utility NFTs**, as racing fans with NFT tickets not only gained access to the race, but also to exclusive benefits including hospitality perks and future race discounts.

Finally, **Open Ecosystems, Token Gating, and Decentralised Autonomous Organisations (DAOs)** like Blockchain Sports or Aera by OneFootball allow brands to convert customers to stakeholders, providing an enormous boost to brand engagement.

In summary, there are ample emerging but effective ways in which XR and Web3 offer innovative ways to engage and monetise, transforming e-commerce and brand interaction.**

*BCG Sources: Finding the Business Value in AR. Other Sources: Fans at the World Cup Can Use AR App; Telstra, Google, and Accenture develop 5G powered AR experience; Los Angeles Rams, Snapchat & Princess Cruises launch augmented reality experience at SoFi Stadium.

**BCG Sources: Rethinking E-Commerce for the Era of the Metaverse; Web3 Opens New Paths to Customer Loyalty.

Innovation Spotlight: BCGx Team's Pick

AR in sports marketing, advertising, and activations

Perth Heat partnered with XRii to enhance fan engagement and revenue through a custom app, achieving high user sign-ups and voucher redemption rates.



Perth Heat, one of the most accomplished teams in the Australian Baseball League, engaged XRii to revolutionise fan experiences through a blended digital engagement campaign to gather audience data and incentivise fans at games.

Using XRii's technology, Perth Heat launched a custom-branded app to promote a \$50k cash giveaway to collect attendee data and engage users with in-app rewards. The integration of XRii technology not only fostered greater engagement with fans and sponsors on

game day but also opened new avenues for revenue generation for both the club and its partners.

The seamless integration of XRii's AR technology with digital campaigns and in-venue experiences led to impressive results, including:

- **60% of app downloads converted to user sign-ups**
- **75% of app users entered into the AU\$50,000 promotion**
- **76% of vouchers collected**
- **95% of vouchers redeemed**

Innovation Spotlight: BCGx Team's Pick

New technologies in sports training

The NFL uses VR to improve trainings, resulting in fewer concussions, improved performance, better player preparedness, and enhanced coaching benefits.



The NFL has been leveraging VR technology to enhance training for players and coaches. Teams like the Dallas Cowboys, New England Patriots, New York Jets, and Arizona Cardinals have integrated VR into their practice routines. VR provides highly realistic training environments that mimic real-life game situations, allowing athletes to fine-tune their skills without physical contact. It also offers a safe practice environment, reducing the risk of injuries that typically occur during traditional training sessions.

Reduction in Concussions: The Dallas Cowboys reported a 25% reduction in concussions during practices by using VR.

Improved Performance: A monitored study involving student football athletes showed a 30% overall improvement in assessment scores with VR training compared to traditional methods.

Enhanced Player Preparedness: Players can put in more hours of practice, fine-tuning their skills in a controlled, risk-free environment.

Coaching Benefits: Coaches can test new tactics and analyse player decision-making without risking injuries.

Health Benefits: A systematic review indicated that VR exercise can improve physiological, psychological, and rehabilitative outcomes.

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Innovation Spotlight: BCGx Team's Pick

AR in live sports broadcasting & fan engagement

The NFL and Sony used AR technology for a themed broadcast to engage younger fans and boost views.



The NFL and Sony utilised Sony tracking/AR technology to run an alternate broadcast of the Week 4 2023 matchup between the Jacksonville Jaguars and the Atlanta Falcons on Disney+, ESPN+, and the NFL's owned streaming app (NFL+). The broadcast featured players made to look like toys to mimic the popular children's movie franchise Toy Story, with the playing field set in the series character Andy's childhood bedroom, with the toy characters watching as spectators. This broadcast was the most recent attempt by the NFL to reach children through alternate broadcasts. In previous years, a Nickelodeon-themed simulcast had been used similarly,

but never with the players fully tracked and rendered as ESPN and Sony did this past October.

According to Nielsen, **Nickelodeon broadcasts have seen viewership increases of around 5% during these alternate broadcasts among the 2-11 and 12-17 age groups – the exact demographic the NFL is looking to appeal to, as its core fanbase is approximately 50 years old.** Capturing younger fans is imperative to sustaining the league's popularity for generations into the future, and these alternate broadcasts have been one of the ways the NFL has invested in growing fandom among younger individuals.

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User Activation



Pioneering Perspectives

Connecting sports fans through social media



Ruben van Eijk

Head of Creative Shop for Central & Eastern Europe at Meta



Over the years, how have platforms like Facebook and Instagram evolved to enhance fan engagement, particularly in sports?

Facebook and Instagram have undergone significant changes to improve fan interaction in sports with numerous new features and updates. The introduction of Groups on Facebook created a space for fans to connect, share, and discuss their favourite teams. At the same time, Live Streaming enabled real-time interaction with athletes and events, and Video provided a video-on-demand service for sports content. On the other hand, Instagram leveraged Stories and Reels for behind-the-scenes content and quick highlights, IGTV for long-form sports content, and Live Streaming for real-time engagement with athletes and teams.

How can brands and creators effectively capture and sustain fan attention online where digital distractions are abundant? What strategies have proven most effective for Meta?

To capture and sustain fan attention online, it's important to share authentic, exclusive content that really resonates with your audience. Consistency is key, so regularly posting engaging content helps maintain interest. Encouraging fan participation through polls, Q&A sessions, and

contests makes them feel involved and can make a big difference. Using analytics to understand and cater to fan preferences is also crucial.

As a leader in the digital space, Meta has found success with the below for sports fans:

- 1. Facebook Groups:** Fostering community building and fan engagement.
- 2. Instagram Reels:** Sharing bite-sized, engaging content.
- 3. Meta Quest:** Offering immersive sports experiences through VR technology.
- 4. Influencer Partnerships:** Collaborating with athletes and creators to promote sports content.
- 5. Live Events:** Streaming exclusive sports events and behind-the-scenes content.

As Meta continues to develop virtual realms, what unique opportunities will arise for sports fans?

As Meta develops the metaverse, sports fans will gain unique opportunities to experience sports in immersive and interactive ways. They can attend **live events in virtual stadiums** with real-time stats and social sharing, meet athletes in virtual Q&A sessions and autograph signings,



and participate in **fantasy sports 2.0** with real-time updates and rewards. Fans can also access **virtual training from top athletes**, collect **digital memorabilia**, and engage in **social impact initiatives**. Additionally, the metaverse will offer **competitive gaming** and **virtual sports tourism**, revolutionising sports entertainment and fan engagement.

How are fans collaborating and co-creating content with their clubs within Meta's platforms?

Fans and clubs have been getting creative with:

- 1. Facebook Groups:** Many sports teams have official Facebook Groups where fans can discuss, share content, and engage directly with the team.
- 2. Instagram Fan Accounts:** Fans create and manage Instagram accounts dedicated to their favourite teams, posting fan art, highlights, and news updates.
- 3. Facebook Video:** Teams and leagues use Facebook Video to share exclusive content, behind-the-scenes footage, and live matches, encouraging fan interaction and discussion.
- 4. Instagram Reels:** Fans create and share short videos showcasing their team spirit, skills, and creativity, often participating in branded hashtags and challenges.

“

To capture and sustain fan attention online, it's important to share authentic, exclusive and personalised content that really resonates with your audience.

jersey co-creation campaign, inviting fans to design and submit their own jersey concepts. The club could then mint NFTs of the top designs, allowing fans to purchase and own a unique digital collectible. The proceeds could support a charity or fan-led initiative, fostering a sense of community and shared ownership.

By leveraging technologies, Meta aims to empower fans to improve their sports experiences, creating a more immersive, interactive, and community-driven environment.

Innovation Spotlight

Transforming user engagement

Foxy Fitness motivates people to develop a consistent healthy lifestyle through challenges, engagement, and gamification.

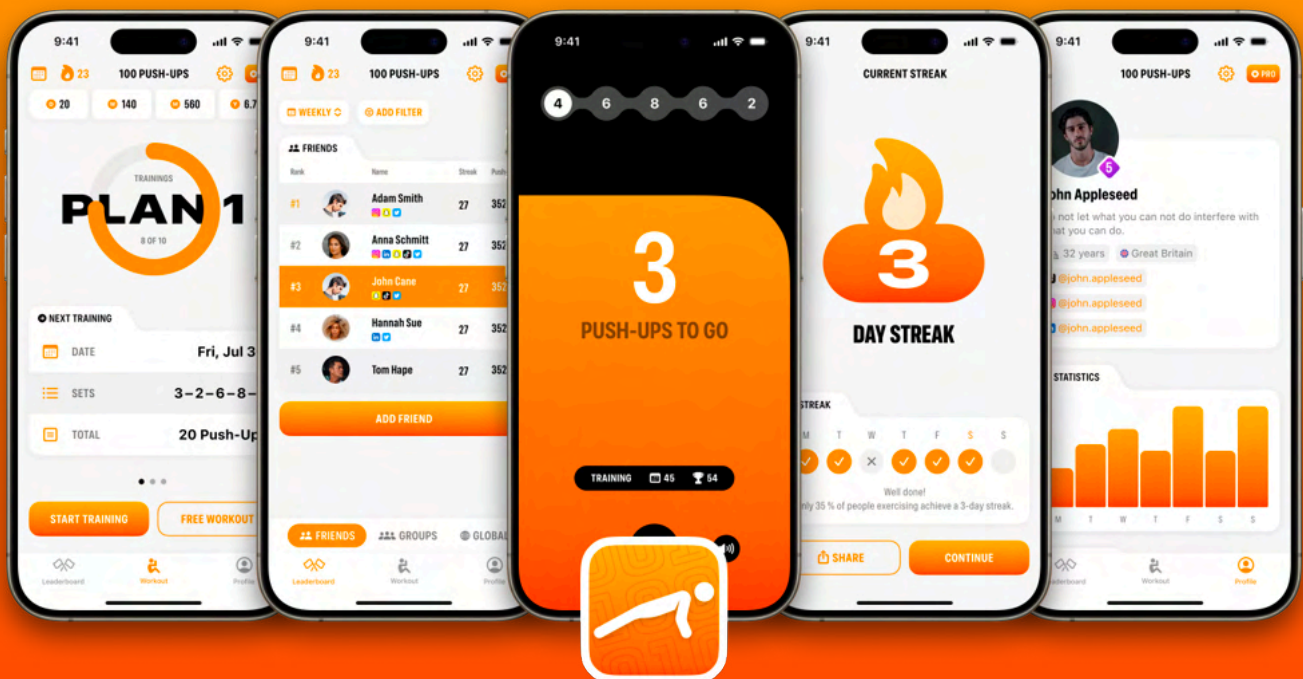
Foxy Fitness has developed a 100 Push-Ups Counter & Trainer app with gamified digital strategies that help creating fitness habits. The app transforms an iPhone or iPad into a personal trainer, offering a professional training plan that helps users progress from zero to 100 push-ups. Each push-up is automatically detected using the built-in proximity sensor and camera, ensuring an accurate count of repetitions.

Connected directly to Apple Health, the app offers a wide range of features. For example, a leaderboard improves motivation by comparing users' progress with friends and other app users worldwide. To make the rankings even more exciting, users can link their Instagram, TikTok, or LinkedIn accounts.

With thousands of downloads and 30,000 active users, the app boasts an impressive 4.73 out of 5-star rating.



>100,000 The Number of downloads in the first 12 months.



100 Push-Ups Counter & Trainer app

Innovation Spotlight

Connecting, motivating and rewarding

Muuvr is pioneering the first genuine sports loyalty program with an innovative app. By leveraging the power of community, we reward individuals for their effort.



Join the Muuvment

Muuvr believes in the transformative power of community and rewards to inspire a healthier, more active world.

Muuvr is designed to motivate individuals through a unique rewards system that values effort and consistency over performance. Users earn experience points (EXP) based on their heart rate and duration of activity, regardless of the type of exercise. This innovative approach ensures that everyone, from beginners to seasoned athletes, can accumulate Muuvs,

our in-app digital currency, which can be redeemed for a variety of rewards.

In essence, Muuvr is more than just a fitness app; **it's a dynamic ecosystem that brings people together, fuels their motivation, and celebrates their achievements.** By turning physical activity into a rewarding and enjoyable experience, we're making strides towards a healthier, more active world.

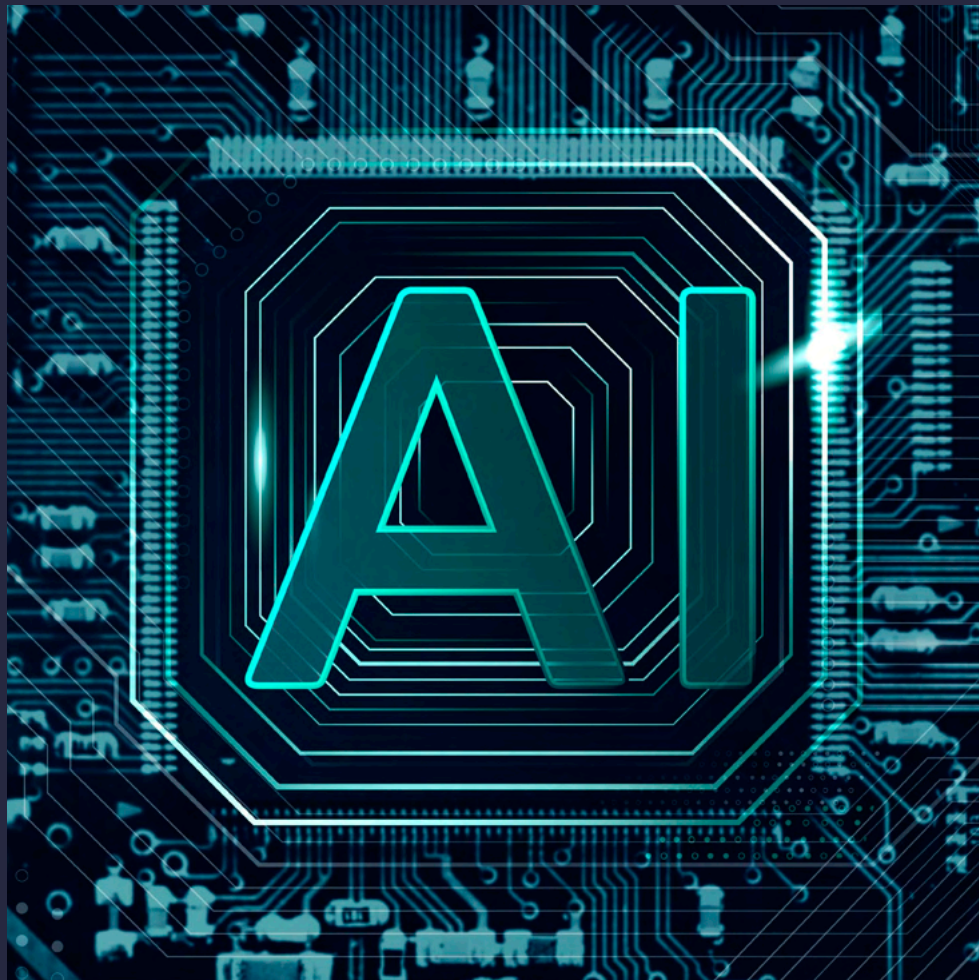
Pioneering Perspectives

Reflecting on innovation: paths and obstacles



Jean-Philippe Hagmann

Author, Keynote Speaker and Consultant for Radical Innovation



How do you define innovation in today's rapidly changing world?

First, I would like to define innovation. In my view, it is independent of the rapidly changing world. **Innovation can be seen in different ways: result, process, path, or discipline.** When discussing the result, innovation refers to a product, service or business model successfully launched in the market and possesses a high degree of novelty, adding value regardless of its label. However, viewing innovation as a discipline, skill, competence, path, or process is more exciting. I define innovation as seeing new paths and breaking new ground. **Distinguishing between incremental and radical innovation is also important.** Incremental innovation improves existing solutions, making them better, faster, smaller, etc. Radical innovation, on the other hand, solves problems and needs in a new, alternative way. Personally, I focus more on radical innovation and innovation as a path and discipline.

What current innovation will have the biggest impact on our future?

If we define innovation as before, this question should focus on which technological developments will most impact the future. **Technology and innovation should be considered separately.** In terms of technology, the current hot topic is AI, particularly large language models

and generative AI. I believe these will significantly impact civilisation, influencing how we think, learn, and communicate.

How will developments in the sports industry change how we play, watch and understand sports in the next decade?

First, I am, or at least was, very passionate about participating in sports, but I've never really been an avid sports spectator or follower. Nevertheless, I think we have some exciting directions here. Broadly, sports can be divided into two types: those where competitors play against each other with rules and those where performance is measured objectively, like athletics. In the latter, breaking records becomes harder due to diminishing returns. Introducing new disciplines, tools, materials, and technologies could make these sports more exciting.

In team sports digitalisation, analysis, and AI have made game strategies more predictable, potentially making the games boring. I would like to see the possibility of introducing new rules here. Take soccer, for example: what if you developed a tournament where the spectators could decide on certain rules at the beginning, but these only apply to this tournament, making the games more exciting and unpredictable?



In your opinion, what are the biggest obstacles to innovation?

The biggest barriers to innovation, seen as a discipline, a skill, or a competence, include **a lack of "real will" from decision-makers**. Innovations often struggle if decision-makers do not fully commit to the necessary changes and sacrifices. Another challenge is **prioritising feasibility over desirability and profitability**, which can cause problems later. **Lack of experimentation and betting too big on single projects** are also issues. A better approach is to initiate many small bets, allowing for failures and adjustments.

Tackling these obstacles requires education, teaching innovative thinking early in schools, encouraging questioning, and exploring alternative paths. This should be part of education to promote this kind of thinking.

Can you tell us a personal story in which you had to overcome the boundaries of traditional thinking to be successful?

There are questions involved: When are you successful? And am I successful? But perhaps a story from my first startup fits here. I aimed to develop a new school desk. Noticing that traditional classrooms weren't designed for modern, project-based teaching, I wanted to create a flexible desk for old school buildings. I overcame the limits

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Viewing innovation as a discipline, skill, competence, path, or process is more exciting. I define innovation as seeing new paths and breaking new ground.

of traditional thinking when I realised that most school furniture manufacturers tried to produce desks with castors so that they could be moved flexibly around the classroom. But at the same time, they made the desks very solid and heavy so they wouldn't be destroyed. I questioned the basic assumptions: Why are desks being "destroyed"? Is it really because of the rowdy children? Are castors the only way to make tables flexible and mobile? To cut a long story short: I finally came up with the idea of creating a cardboard table that weighed just five kilograms, could be put together by the children themselves and was much cheaper than conventional tables, which is why the table could be given to the children as a gift. The table then effectively belonged to the children and was treated better.

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Global dynamics in the media and content landscape push us to continuously innovate. Through active collaborations with sports tech-startups and passionate innovators we successfully ride the wave of relentless improvement and stay ahead of the innovation curve.



Matthias Reichert
CCO of SPORT1

Innovation Spotlight

Making tennis accessible for everyone with VR

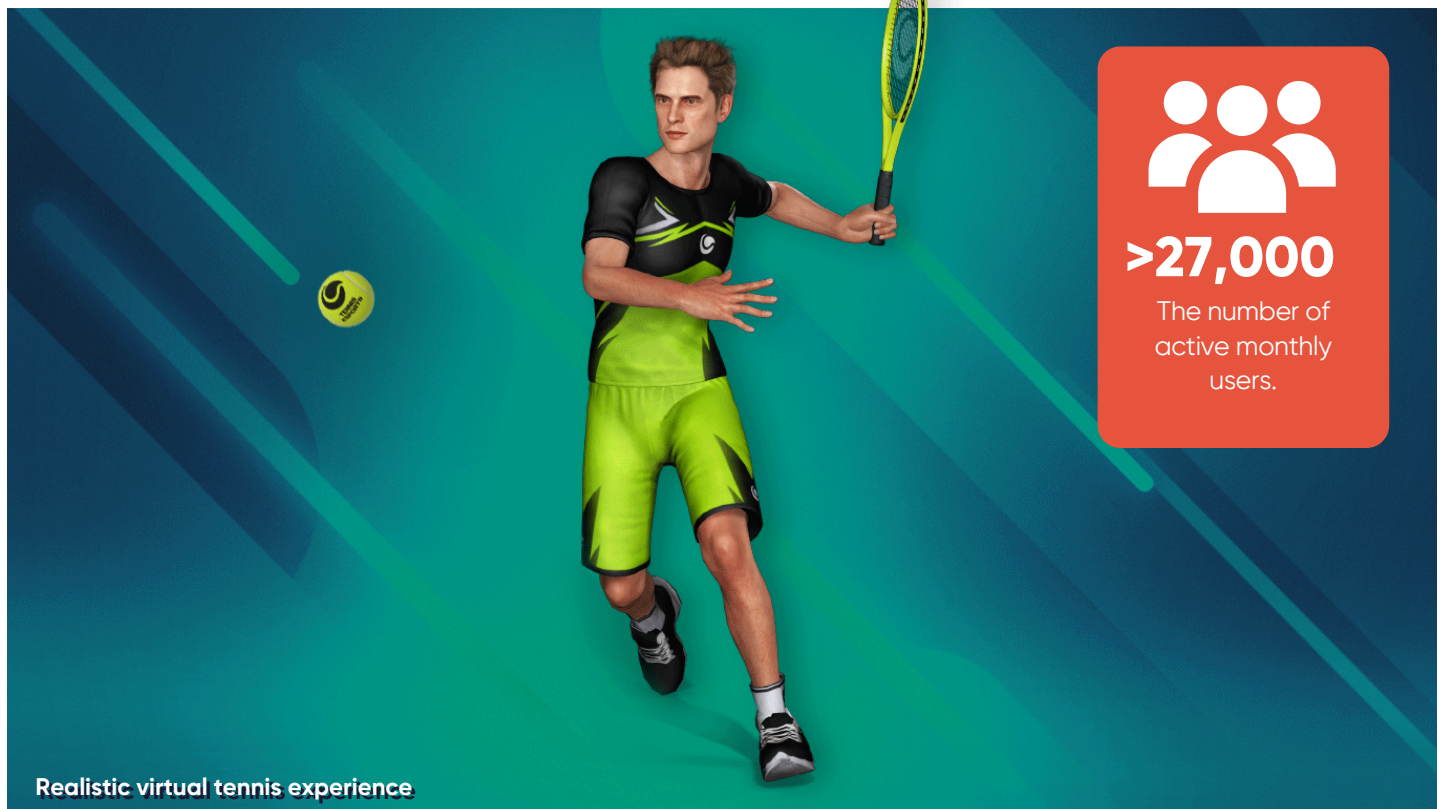
Tennis Esports creates the most realistic VR tennis experience for gamers and tennis fans of all ages and levels.

Tennis Esports is pioneering the intersection of tennis and Virtual Reality, providing an immersive and realistic VR tennis experience for players of all ages and skill levels. Available on Meta Quest 2, 3, and Pro, the company offers a unique platform where users can play in virtual stadiums, engage in arcade games, compete globally through the Tennis Esports Tour, and play against over 10 AI opponents suitable for beginners to avid players.

Tennis Esports caters to a wide audience including gamers, tennis players, and sports fans. It offers an engaging way to practice and enjoy tennis without the need for a physical court, making it accessible from anywhere. **The app is highly rated, with an average rating of 4.5 stars and boasts more than 27,000 monthly active users. Our campaigns have generated millions of views worldwide with over 250,000 matches played.**



The project was featured at major tennis events such as the US Open and Roland Garros, with significant brand activations and sponsor engagements.



>27,000

The number of
active monthly
users.

Realistic virtual tennis experience

Innovation Spotlight

Transforming fitness with VR gym experiences

Black Box VR is revolutionising traditional gym experiences by fusing fitness, gaming, Artificial Intelligence and virtuality.

The Black Box VR Gym offers immersive workout trainings: in each session, members enter a private booth and are transported to a virtual stadium to compete in different gamified exercises. They engage in 30-minute VR sessions featuring resistance exercises like punches, squats, and presses, personalised by AI to individual fitness levels.

A 2022 peer-reviewed UCLA study highlighted several advantages of Black Box VR over traditional gym exercises. Participants experienced greater muscle gains, more significant fat loss, and improved cardiovascular

fitness. The shorter, 30-minute workouts were more effective and enjoyable. Members also report improved sleep and overall life satisfaction.

With over 1.6 billion collective Lbs. lifted, Black Box VR Gym represents a successful solution combining gaming with innovative fitness.



>100,000

The number of workouts completed in VR by our community.



Media & Marketing

Pioneering Perspectives

Innovating sports media: SPORT1's journey to 2030



Matthias Reichert
CCO of SPORT1



As a media house, SPORT1 has strongly focused on innovations in recent years. Can you explain why this is so important?

Our journey began about four years ago when we realised that we needed to create a structure for innovations within our organisation. Initially, it was individuals who wanted to drive new topics forward, but often these ideas failed due to the existing structure. So, we needed to create an environment that provides space for innovations.

What are the main pillars of this innovation structure?

Our structure is based on three pillars. **The first pillar is agency services**, where we develop new products and offer them to the market as B2B solutions, such as our live shopping service. We conceptualise and orchestrate new products, which we then offer to our partners. For example, in the live shopping area, we have developed a highly scalable solution and won partners like Media Markt and Saturn. **The second pillar is investment in startups** because many innovations rarely come from within the company itself. Over the last one and a half years, we have invested in eight startups to foster innovations

coming from outside. We focus on sports publishing, innovation, and technology. **The third pillar is brand extensions**, where we further develop and monetise well-known formats like "Doppelpass," for example, by organising events across the country.

Innovations are often shaped by changing trends. How do you deal with this?

Since we started focusing on innovations in 2021, we have learned to respond flexibly to new trends. Whether fan tokens, blockchain, NFTs, or Artificial Intelligence – we experiment and continuously learn. For example, we quickly realised that it makes more sense to position ourselves as enablers for technology rather than just aiming for maximum reach. We attend many conferences and events to build networks and stay up to date. **The important thing is not to structure everything perfectly but to learn from the market and remain flexible.**

Can you give an example of a successful innovation from recent years?

A good example is our engagement in virtualisation. We quickly reacted during the 2022 Darts World Championship and conducted tests to learn and strengthen our



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Artificial Intelligence will play an important role, particularly in improving fan engagement and personalising content. It's about creating new and better experiences for our fans by using technology intelligently and being solution-oriented.

positioning as a technology enabler. We found that a clear separation between operational business and innovation areas is necessary to be sustainably successful. Additionally, we learned that it is important to create a structure that supports and promotes innovations without stifling them in daily business.

What role will Artificial Intelligence play in your future vision?

Artificial Intelligence will play an important role, particularly in improving fan engagement and personalising content. It's about creating new and better experiences for our fans by using technology intelligently and being solution-oriented. It's about engaging with fans and integrating new technologies meaningfully.

Talking about fans, how do you manage the various channels and platforms to reach the fans?

It's always a challenge to find the right balance between new and traditional channels. Platforms like TikTok and Twitch offer enormous potential for reach and engagement, but we also need to ensure that we can use this reach effectively. We experiment a lot and try to figure

out how best to integrate these platforms into our strategy. We see ourselves as pioneers opening new ways in sports consumption and engagement, that's why we constantly learn and adjust our approaches to achieve the best results for our fans and partners.

Finally, how do you see SPORT1 in 2030?

I believe that SPORT1 will be more verticalised in 2030, with its own virtual worlds for different sports. These worlds will offer fans a comprehensive experience, from news acquisition to ticket purchases, supported by blockchain technology. **Our goal is to create an ecosystem where fans can actively participate and benefit.** By 2030, sports consumption and fan engagement will be completely redefined, and I look forward to shaping this development with SPORT1.

Innovation Spotlight

Blending Darts World Championship and virtuality

SPORT1, a leading German sports media network, brought the Darts World Championship to Decentraland, offering an immersive experience to fans.

SPORT1 has launched an innovative project, integrating the Darts World Championship into the Decentraland metaverse in collaboration with 42Meta. This initiative combined the emotional appeal of sports with metaverse capabilities, creating an engaging experience for darts supporters. We built a virtual "Ally Pally" featuring a fan shop, hall of fame, video walls, and insights from stars and experts, allowing fans to participate and interact seamlessly.

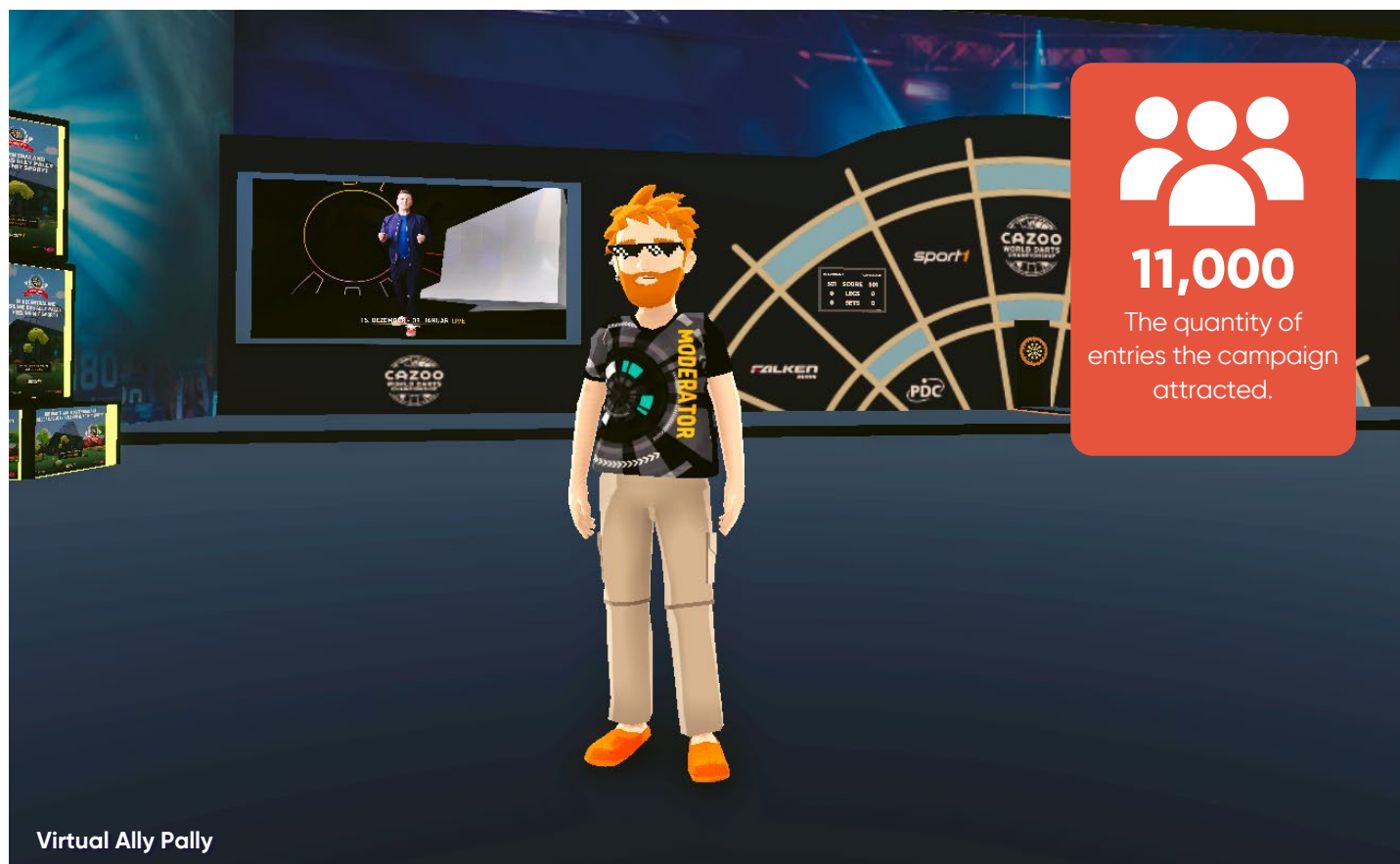
With this project, we aimed to reach digitally savvy younger audiences, gain insights into brand presenta-

tions in the metaverse, and explore new business models. The campaign saw significant engagement, with participants receiving NFTs and prizes, including tickets to the Championship final. Advertisers, such as Falken Tyre Europe, were successfully integrated into the metaverse event, demonstrating the potential for brand engagement in this new environment.



18,000

The number of darts thrown in the space.



Virtual Ally Pally

Innovation Spotlight

Riding the virtual wave with LAOLA1 Sports Island

LAOLA1, Austria's premier sports content provider, is effectively navigating the evolving digital landscape with a virtual world of sports and entertainment.

Teaming up with Cheeer, LAOLA1 launched Austria's first virtual Sports Island, featuring twelve customisable sports and entertainment zones. This innovative approach empowers advertisers to engage with their audience in new and exciting ways.

We integrated branded elements offering:

- **Virtual stadiums for various sports**
- **Live sports experiences**
- **Meet and greets with sports celebrities**
- **Games and competitions with exciting prizes**

such as the Erste Bank Open (ATP 500), Boss Vienna Padel Open, and brands like Kia or Sporthilfe take their first steps into the virtual realm and expand their digital presence and engagement with existing and new audiences.

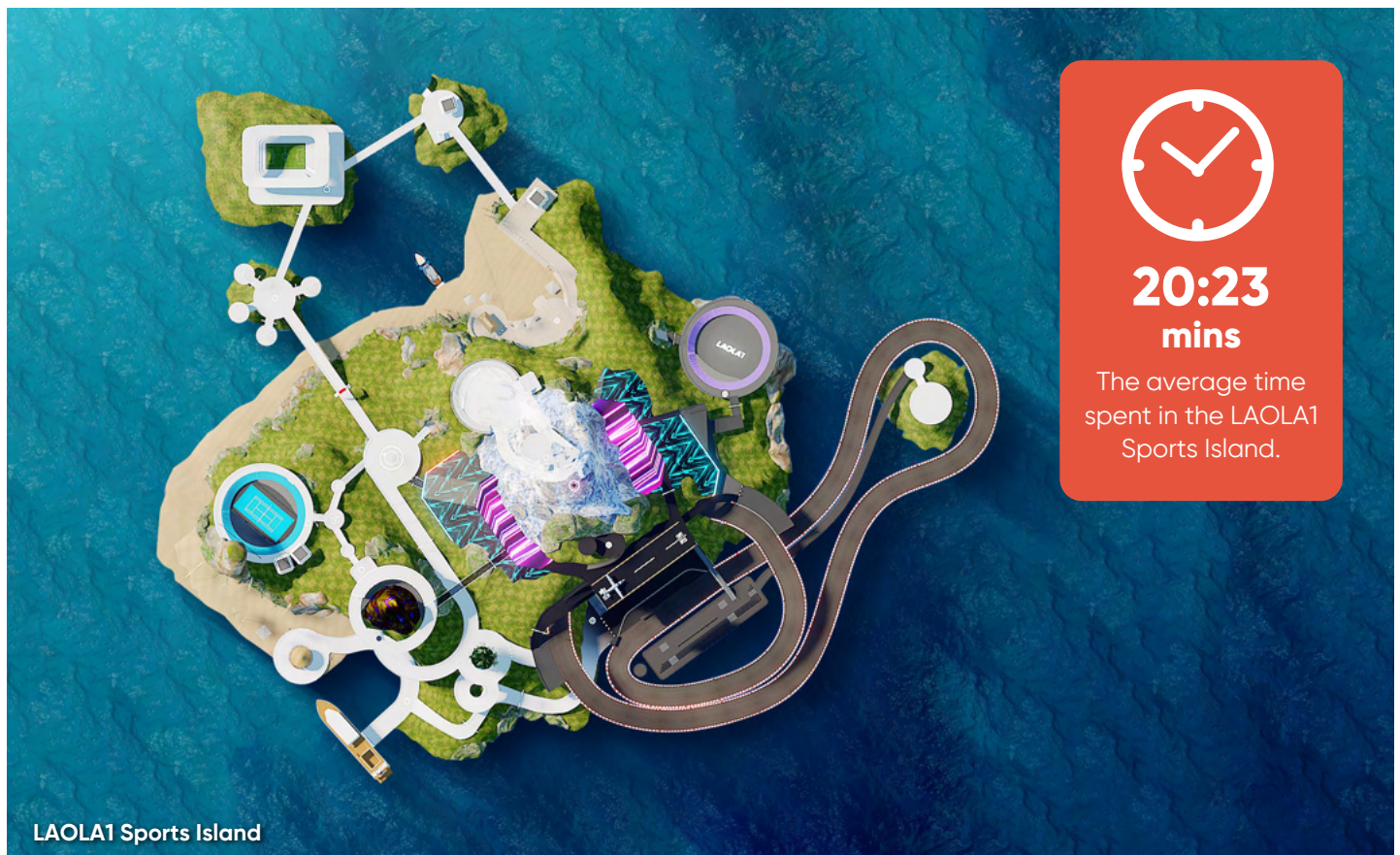


#VICTOR2023

Sports Innovation of the Year Award

Sport Business Magazin, Austria

Through this initiative, we helped top sporting events



Pioneering Perspectives

Innovating sports marketing and networking



Hans-Willy Brockes
CEO of ESB Marketing
Netzwerk



Copyright © Gabriele Griessenböck

What are some of the most exciting innovation trends in the sports industry?

The sports industry, like many others, is driven by numerous tech and data innovations. It's crucial to distinguish between different perspectives. In actual sports, eSports and gaming hold significance, but not as much as anticipated a few years ago. Similarly, the applications of web3/metaverse have not triggered significant developments in sports. However, **the technical possibilities of streaming and all types of community-building are shaking up the sports world and allowing new sports formats to establish themselves quickly.** Examples include the Baller League and the Icon League. These innovative football formats quickly gain relevance thanks to testimonials and digital communication channels. **It is suspected that tech applications and AI models are already heavily influencing the optimisation of athletic performance.** I believe this is not yet made public to maintain a competitive edge.

How do emerging new technologies transform sports marketing and fan engagement?

Artificial Intelligence is a fundamental technology in marketing in 2024, revolutionising the interaction between sponsors, sports rights holders, and their target groups. **Hyperpersonalisation, enabled by AI and machine learning, allows for extremely targeted sports consumption.**

This results in entirely new marketing strategies. In the future, algorithms will determine fan experience 365 days a year and 24 hours a day. The information and interaction points will be significantly less with traditional media and more with the sports providers themselves, particularly the athletes, i.e., the "sportfluencers." The second important trend is **the shift from eCommerce to social commerce.** This gives sportfluencers and sports providers direct sales channels, making them retailers or affiliate marketers. Social media platforms like TikTok and Instagram are gearing up for this, and it remains to be seen how Amazon and other retailers will respond. Their interest in sports rights is already known, but sustainable business models are still lacking.

How important is fan engagement to the overall success of sports marketing efforts?

Before answering the question of fan engagement, it is crucial to define what constitutes a fan or the different categories of fans. However, technology and the resulting business models will take care of this in the future. Essentially, fans are those who want to experience the sport live, expressing their engagement through club memberships or active followership on the sports provider's numerous channels. These fans are further activated through hyperpersonalisation and increased interaction,

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Hyperpersonalisation, enabled by AI and machine learning, allows for extremely targeted sports consumption, resulting in entirely new marketing strategies.

Copyright © Gabriele Griessenböck

with the marketing goal being to optimise commercial success. **A key marketing question is how to expand the target group to include "fans in the broadest sense."** How do you turn interested individuals into members, and how do you create access to a sport, a club, or an athlete for people? Data-driven analysis enables sports organisations to create personalised marketing messages and address stakeholders with personalised content.

Looking ahead, how do you envision the role of networking platforms like ESB evolving in the sports industry?

The ESB Marketing Netzwerk initiated professional networking in the sports business over 30 years ago. Founded as the European Sponsorship Exchange, ESB has initiated all leading sports business congresses and works closely with key players like the ISPO sports trade fair. Our central task is to anticipate developments early and to bring these topics to our stages and newsletters. This keeps brands, rights holders, and stakeholders in the sports business up to date. **In an increasingly technologised world, physical network platforms play a crucial role in fostering personal contacts and exchanges.** This occurs 365 days a year in the ESB Marketing Network, where members can access know-how, contacts, and communication platforms.

How does ESB facilitate meaningful connections between decision-makers in sports, entertainment, and marketing?

Matchmaking is a very important and successful service within the network. This always happens at ESB through personal contact and exchange. The more we hide behind screens, the more important high-quality personal conversations become.

Can you provide examples of innovative collaborations that have emerged from your platform?

We connect partners with each other daily. Thanks to ESB, Borussia Dortmund works with the brand management tool Frontify, the European Handball Federation (EHF), and several other ESB partners have created their sound logo with WeSound. Additionally, with our help, numerous Foal Football Camps of Borussia Mönchengladbach in Switzerland have come about. **In sponsorship, the matching successes are countless and thus remain an important aspect of our daily work as a former sponsorship exchange.**

Innovation Spotlight

Innovating in-stadium fan experiences

ASB GlassFloor a sports flooring solution that enhances performance, reduces joint strain, and redefines fan experiences.



Basketball Champions League

ASB GlassFloor fosters an interactive experience for fans, fundamentally altering how we witness and celebrate the spirit of athleticism. It enriches games with immersive experiences, engaging both athletes and spectators alike.

Imagine the court itself becoming an active participant in the spectacle: **dynamic floor animations erupting in response to dunks and free throws illuminated with player statistics, further amplifying the electrifying energy.** Half-time shows and opening ceremonies will be revolutionised with **captivating elements displayed**

directly on the court, creating an immersive experience unlike any other. Consider the possibilities of interactive in-game elements on the court, such as air hockey or obstacle courses – the only limit is your imagination. ASB GlassFloor promises to transform the way we experience sports, fostering a deeper connection and providing a truly unforgettable experience for everyone involved.



Recognised as 1 of the most innovative companies in sports by Fast Company.

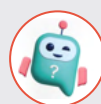
Innovation Spotlight

Revolutionising the sports fan experience with AI

AI chatbots transform stadium visits, enhancing fan engagement and convenience.

In recent years, the integration of Artificial Intelligence (AI) in sports has expanded beyond performance analysis and player scouting to enhance the overall fan experience within stadiums. AI-powered chatbots developed by 2Mobile, a leading company specialising in AI-driven conversational solutions, have made a significant impact. Imagine watching a football match live in the stadium, enjoying a burger, and purchasing a jersey—all without leaving your seat.

What seemed like a futuristic dream two decades ago is now a reality, thanks to the increasing utilisation of AI in sports. AI is now being employed in various facets of sports, including ticketing, online shopping, fan activations, and VIP experiences, as well as enhancing the in-stadium experience.



#AlinAction

AI-Powered Chatbots
Enhance Fan Experience

A composite image showing two smartphone screens displaying the 'Sports chatbot' interface. The left screen shows a welcome message from the 'Virtual Assistant' and a list of service categories: Food & Drink, Matches & Tickets, Fun, News, and Retail & Merch. The right screen shows a 'Sports Chatbot' menu with options for Parking, Lounge, and Food & Drink, followed by a personalized message about a reserved parking space and a map of the stadium. To the right of the screens is a red box with a group of people icon and the text '86% of fans more likely to engage with a club that has an AI chatbot.' Below this is a large, friendly-looking blue chatbot character with a question mark on its chest, surrounded by various sports balls (soccer, basketball, baseball, tennis) and a flag.

Sports chatbot overview

Innovation Spotlight

Leveraging AI for faster sport content delivery

Ligaportal.at, an Austrian sports media company featuring football news and analysis, introduced an AI-powered game reporting tool, offering faster value to fans.

Ligaportal.at has launched an artificial intelligence (AI) game reporting tool that seamlessly integrates into the existing ticker input of the Ligaportal app and the creation of a user-friendly system, providing faster and more reliable content. Initial applications on the platform have shown that the new feature delivers high-quality reports with maximum reliability. On the first weekend that the new feature was used, almost 100 additional match reports (iOS only) were published. In addition, a rating and reporting function will be introduced soon to further increase the quality of the content.

The AI tool allows Ligaportal's team to focus more on creating in-depth content like analysis, interviews, and features due to the increased efficiency in generating match reports. With this initiative, our team shows its commitment to improving and expanding sports reporting using advanced technology.



30-60 seconds

The time of game report creation (reduced from 45 minutes).



“

We are constantly working on improvements that will not only increase the quality and speed of reporting but also enable new forms of engagement for our users.

Ligaportal.at integrates AI into sport reporting

Virtual Fan Engagement



Pioneering Perspectives

Changing the future of sports: new tech and challenges



Nenad Miljkovic
Founder of Venture
Studio Later Labs



What are some of the most significant new technologies in sports now? What do you think is coming up next?

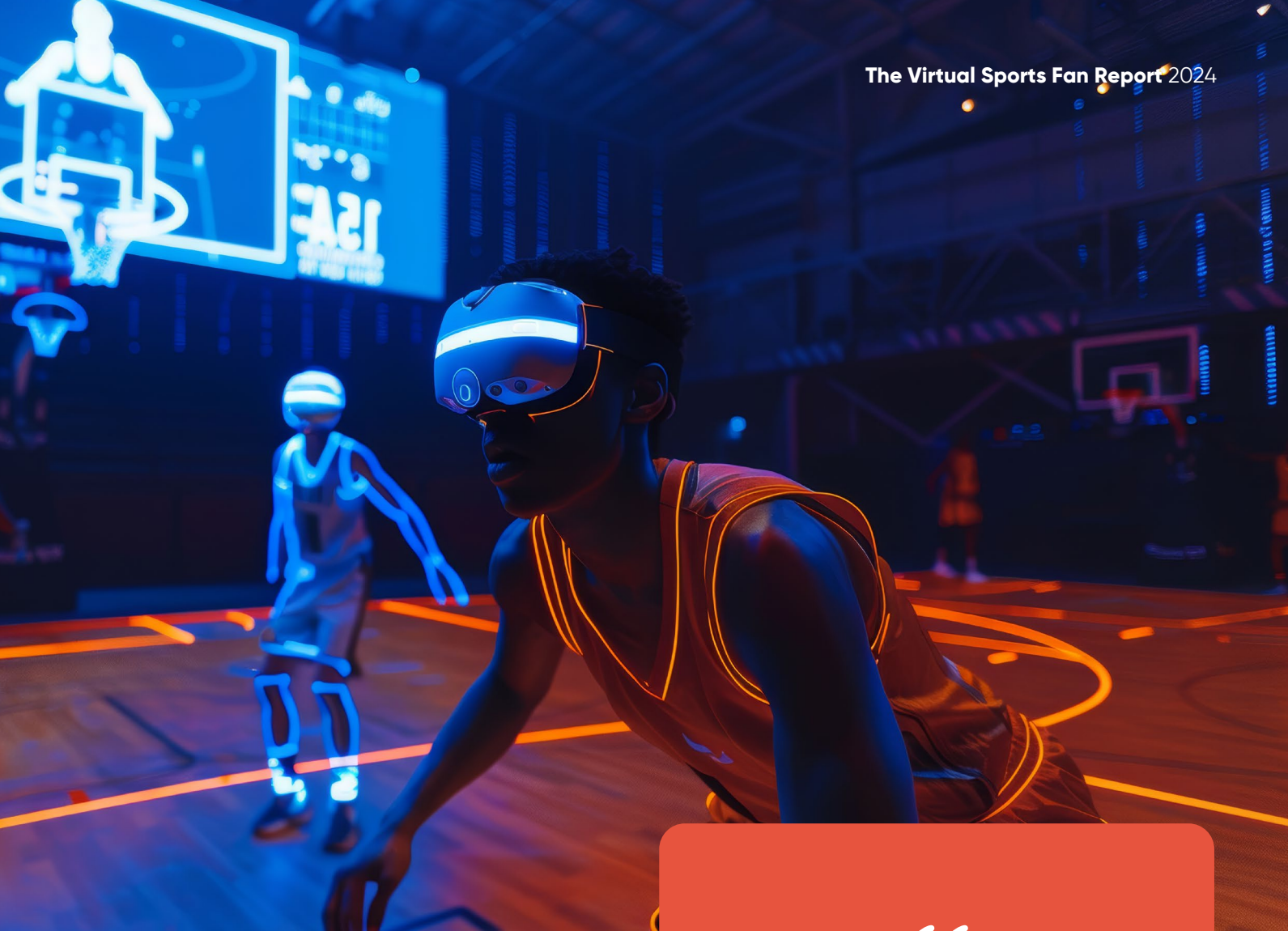
In the current sports landscape, AI-powered live streaming stands out as a transformative technology. It has simplified the broadcasting process by utilising AI camera systems that require minimal setup and no expensive equipment. This allows for instant live streaming and content creation. The next step involves enhancing these systems with AI-driven content management. Imagine a platform that not only films the game but also compiles highlights in seconds, complete with appropriate graphics and AI voice-over, writes match reports, captures photos, and offers various camera angles to viewers. Moreover, integrating fan-generated content could further personalise the experience, creating an AI-customised fan journey that deepens engagement. Beyond live streaming, AI's potential to revolutionise sports is vast. **We can expect AI and mixed reality technologies to merge, offering immersive experiences that were previously unimaginable.** Robotics presents a significant frontier in developing advanced training equipment and mental and physical fitness tools. While the notion of artificial body parts might seem far-fetched, it symbolises the extent of innovation we could witness in enhancing athlete performance.

How is digitalisation enhancing sports analytics, specifically with regard to your projects? And how is it changing the game for fans and the teams themselves?

Digitalisation has long been pivotal in sports, gradually transforming various aspects of the industry. From digital tickets to streamlined business processes, its impact is evident. In my experience, mainly through collaborations with SAP at Rapid Peaks and projects with DFB or FC Bayern, **we've seen how digital advancements can profoundly influence sports analytics.**

A prime example is SAP's commitment to leveraging its technological prowess to help sports organisations better capture and interpret data. By developing specialised software through co-innovation with top clubs and associations, SAP has unlocked new potential for teams and players to understand and utilise their data more effectively. The future holds even greater promise as AI continues to enhance these capabilities.

In B2C, sports analytics' potential to entertain and engage fans is immense. As we advance, fans can look forward to innovative 3D data presentations, immersive



experiences in the metaverse, and Augmented or Virtual Reality interfaces. These advancements will significantly alter the fan experience and team dynamics, making the game more interactive and data-driven.

What are the key challenges you've faced in integrating advanced technologies into sports fan engagement strategies? How can these challenges be addressed effectively?

The primary challenges revolve around **resistance to change, complex implementation processes, budget constraints, or a lack of investment enthusiasm**. Fear of change is understandable, as many organisations hesitate to experiment with new digital fan engagement strategies. Questions about whether such innovations align with their traditions and core fan base often lead to inaction.

Addressing this requires a mindset shift within organisations. Embracing change means recognising the evolving nature of fandom and the need to adapt. Simplifying the implementation of new technologies can also help. **Explaining the benefits of a Web3 fan engagement and loyalty programme in clear, non-technical terms can make these initiatives more appealing.** Budget constraints are another significant barrier. The common

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Embracing change means recognising the evolving nature of fandom and the need to adapt.

approach is to find a partner willing to implement these technologies while paying substantial licensing fees. While economically viable, this strategy might not always prioritise the fan experience. The alternative is to invest internally, which demands a clear understanding of ROI and a long-term vision.

Ultimately, deeply understanding and valuing the fans is the key to overcoming these challenges. **Organisations can create meaningful, non-monetary value that enhances the fan experience by genuinely engaging with them and addressing their needs and preferences.** This approach not only fosters loyalty but also ensures sustainable success.

Innovation Spotlight

Real-time betting through virtual sports simulations

Sportradar utilises advanced technology for immersive virtual betting, filling gaps during periods with fewer live events.



Sportradar offers Betradar's Gaming Solutions, the top choice among bookmakers worldwide for virtual betting. **Our virtual sports, emphasise realism, featuring events, tournaments and gameplays based on real sports and data.** This multi-channel product encompasses a wide range of matches in a realistic league format, complemented by popular betting markets.

Built for betting – built for real

Featuring all 30 Major League Baseball (MLB) teams and utilising real-world data from the MLB, Virtual Baseball In-Play provides unparalleled detail and realism.

High-quality video with broadcast-style transitions keeps viewers engaged, while cutting-edge motion capture from professional athletes ensures the virtual avatars move and react authentically. Due to our exclusive MLB partnership, each game features real team names, official uniforms, and MLB branding, directly appealing to fans seeking accurate team strength stats.



A hyper-realistic betting experience thanks to lifelike simulations and visualisations of team and player performances.

Innovation Spotlight

Ski Challenge – sports with gamification

An engaging game that captivates winter sports fans and gaming enthusiasts, with a direct link to the competitive ski world.

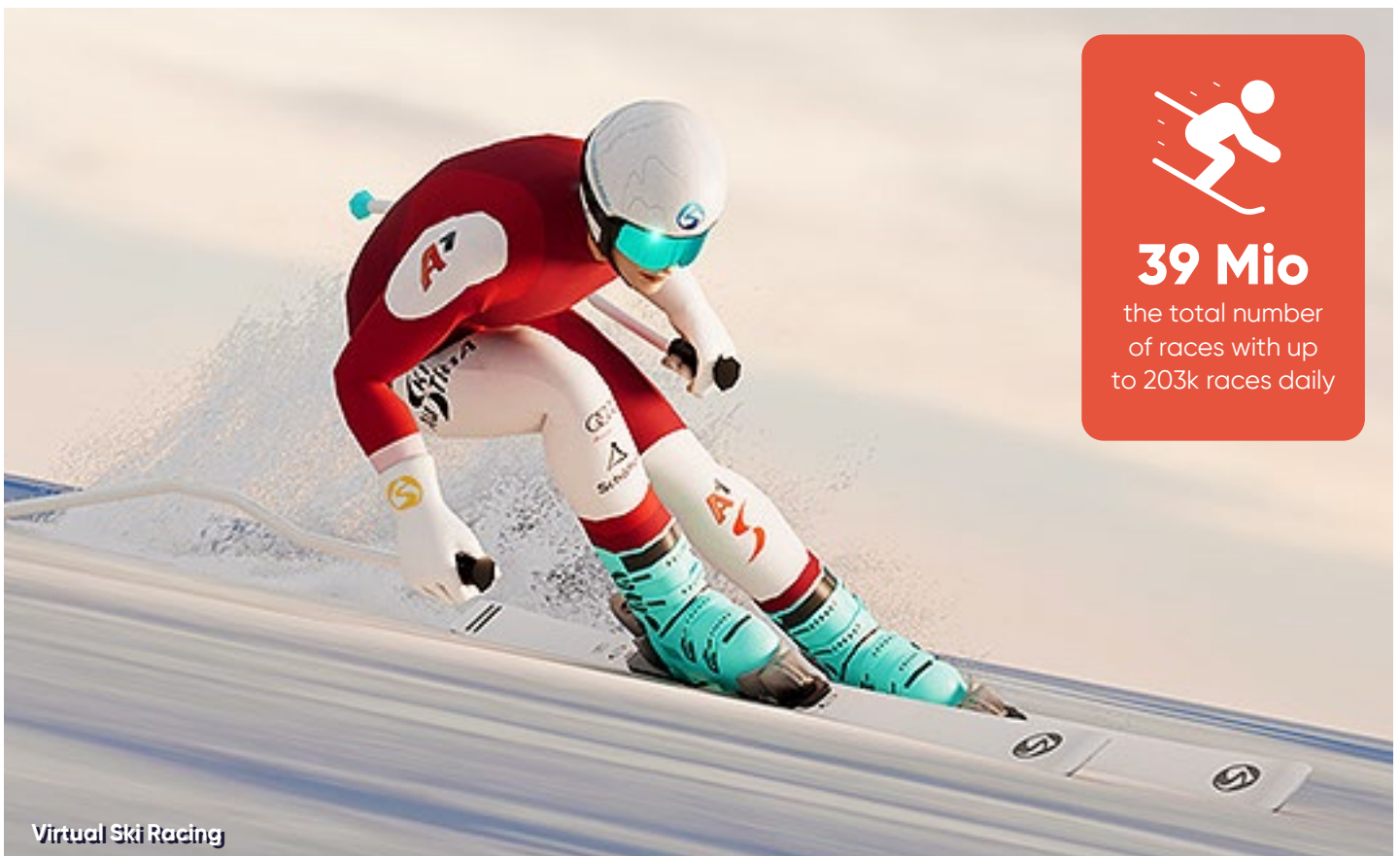
Ski Challenge is a mobile ski racing game where players compete for the best race times on real-world-inspired tracks. Available for download on both the App Store and Google Play Store, it delivers the ultimate virtual skiing experience and has already surpassed 1 million downloads. The game combines competition with fun, connecting with the real sports world and paving the way for a future where virtual and real universes converge, creating a new breed of athletes.

The first step toward this future is increasing the relevance of winter Esports through the Ski Challenge Nations Cup. This international tournament, supported

by the Ski Federations of Austria, Switzerland, and Germany, allows players to compete representing their countries, ensuring maximum exposure and recognition. Ski Challenge bridges the gap between players, the skiing community, and brands, solidifying its position as a leader in virtual ski racing.



Ski Challenge is a global community for gaming and ski fans, with **more than 1 million downloads**.



39 Mio

the total number of races with up to 203k races daily

Virtual Ski Racing

“

We firmly believe that the future of tennis lies at the intersection of technology and fan engagement. By leveraging innovative technologies and creating immersive experiences for fans at the ATP 500 Erste Bank Open, we have the opportunity to shape the revolution of tennis, enriching the player experience and captivating audiences worldwide like never before.



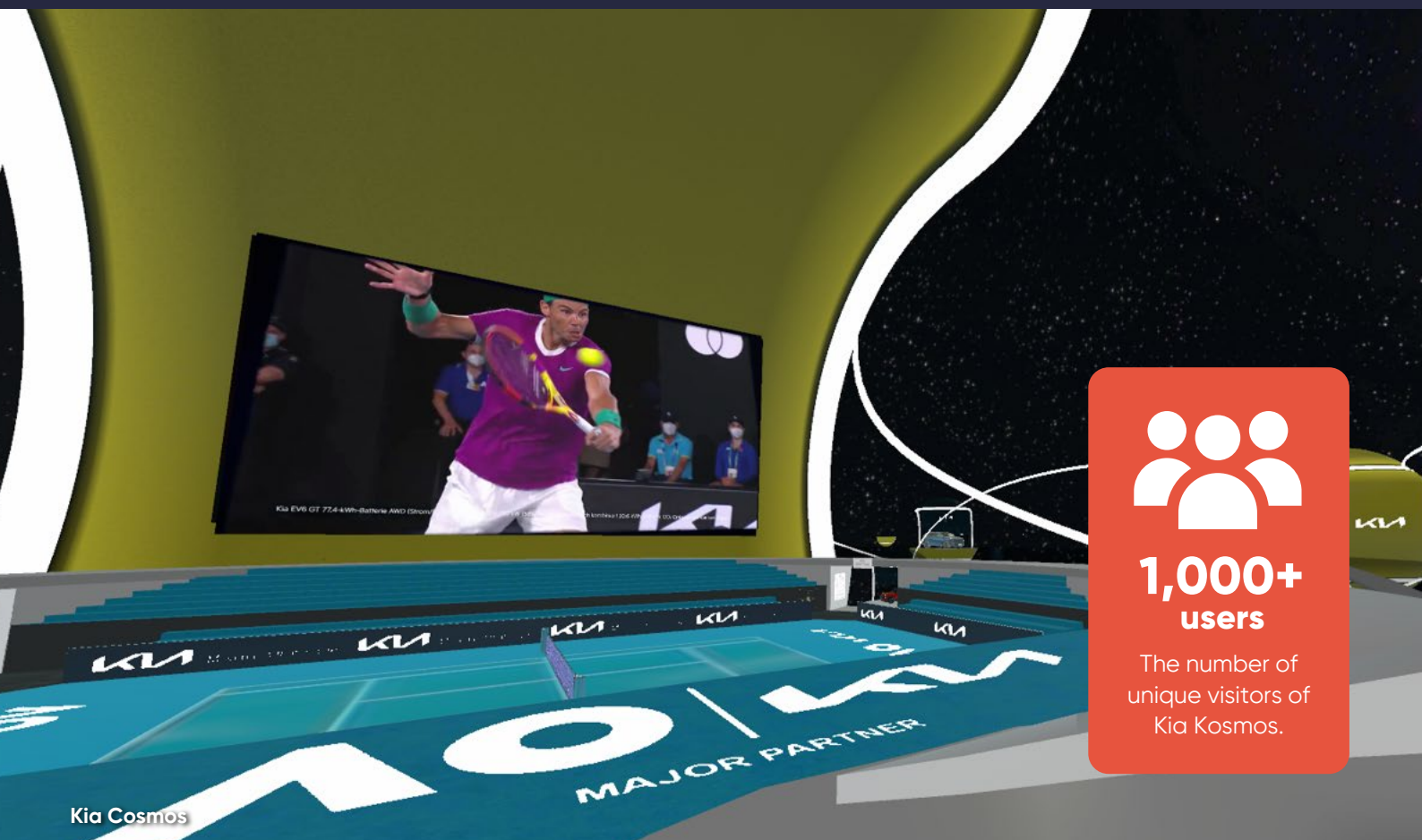
Dominik Beier

Managing Director of Emotion Group

Innovation Spotlight

Driving innovation in the Kia Kosmos

Kia Austria aced fan engagement in 2023 by connecting with young Austrian tennis fans in exciting new ways.



Kia has been the longest-running major partner of the Australian Open, a relationship that showcases the brand's commitment to supporting premier sporting events. For the 2023 edition of the Australian Open, we aimed to achieve two key objectives – elevating fan engagement in new ways and reaching the younger Austrian tennis fanbase.

In collaboration with Cheeer, Kia Austria unveiled the Kia Kosmos, a virtual world in the metaverse. From a digital tennis court to game areas with prizes, live-triggered NFTs of the tournament moments, and even a showroom

displaying our latest models, we captivated audiences with innovation. Our efforts didn't go unnoticed, as industry accolades poured in, driving us to victory.

Thousands of fans joined the space and actively participated in the games and challenges resulting in:

- **18,430 minutes spent by fans exploring the space**
- **Over 1,000 unique users immersed in the experience**
- **350+ likes for the memorable tournament NFTs**
- **Media buzz amplifying our success story**

Innovation Spotlight

Crafting immersive experiences at Super Bowl LVII

As the NFL's Official TV Partner, TCL Mexico offered a new immersive experience during the 2023 Playoffs and Super Bowl LVII.

TCL Mexico collaborated with Cheer to create a virtual TCL Arena, providing NFL enthusiasts with a platform to relive the thrill of the NFL Playoffs and Super Bowl. The world featured diverse spaces, accommodating over 1,000 visitors, including a stadium and a press box.

Fans could create avatars, engage in games and contests and attend interviews with local influencers. Live-triggered NFTs were minted for every touchdown so fans could win, collect or use them as entry tickets for prize draws.

By facilitating user interactions in a simulated environment mirroring real-world settings, TCL offered users a glimpse into virtual-world lounging. This initiative demonstrated how businesses can harness the digital realm to craft distinctive customer experiences.



1,000+ fans

The number of visitors of the TCL Arena.



10,100 visits

The number of unique visitors to the campaign landing page.

Virtual TCL Arena

Pioneering Perspectives

Engaging fanbase digitally: FK Austria Wien's approach



Johannes Dobretsberger
Head of Marketing & Sales
at FK Austria Wien



Football is evolving rapidly with the advent of new technologies. How is FK Austria Wien embracing innovation to stay competitive?

First and foremost, it's crucial to have an overarching data strategy. This strategy needs to be integrated into our roadmap, incorporating various technical innovation proof points. Currently, we are in the process of evaluating our entire ERP and CRM systems, moving towards data migration and transformation. **The aim is to break away from silo thinking to establish a comprehensive data warehouse. This allows us to maximise our understanding of customer and fan behaviour by using innovative tools to gather and analyse data.** By consolidating our data, we can make more informed decisions and tailor our strategies to better serve our supporters and stakeholders. It's an ongoing process that requires constant evaluation and adaptation to new technologies and methods.

With digital platforms booming, how does FK Austria Wien connect with fans in Austria and globally?

Initially, our primary focus is on our regional area, leveraging the potential within Vienna, a city of nearly two million people, and neighbouring regions. However, we are also

looking to expand our global reach. **Our approach involves shifting our social media strategy towards more storytelling, targeting different groups on each platform.** For instance, we're heavily investing in the growing women's football community locally and internationally. By customising our content and engaging with this audience, we see increased interaction, more impressions, and greater reach. This enhanced engagement is crucial for our business model as it ultimately supports monetisation efforts. We've also seen success with our interactive campaigns and fan engagement initiatives, which have brought a more personal connection between the club and its supporters.

How do you attract and retain younger fans' attention online?

It's all about storytelling and delivering the right message to each segment. Platforms like Instagram, Facebook, and especially TikTok play a significant role. TikTok, in particular, allows us to connect with younger audiences through short, engaging content that resonates with them. Instagram serves as our primary channel for broader club stories and includes side stories and interaction through activation programmes. These programmes often involve **gamification and promotions designed to**



engage younger fans. By partnering with various industries, we create compelling content that keeps younger audiences engaged both inside and outside the stadium. We're constantly exploring new trends and tools to keep our digital presence fresh and appealing to the younger demographic.

How can sports clubs combine traditional in-stadium experiences with the growing digital engagement demand?

It's about creating a balance between traditional and digital experiences. Traditional matchday entertainment is essential, but we must also enhance how we interact with our audience digitally. **We approach this through a phased model: pre-match, matchday, and post-match. Each phase involves a mix of storytelling and activation programmes to keep fans engaged.** For instance, during the off-season, we focus on maintaining engagement through creative digital content and interactive campaigns. Matchday activation is relatively straightforward since the audience is already present, but off-season engagement requires more innovative strategies to keep the fans connected to the club throughout the year. It's about creating a seamless experience that merges the physical and digital worlds.

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By consolidating our data, we can make more informed decisions and tailor our strategies to better serve our supporters and stakeholders.

Do you see any risks or challenges with the shift from traditional to virtual fan engagements?

If you have a clear data strategy, the risks are minimised. Without a plan, there's a risk of data overload, which can cause a loss of focus on our primary product — the content produced by players on the pitch. It's vital to understand how to use data effectively to tell compelling stories and engage fans.

have a clear vision, the shift to virtual engagements be managed successfully

we maintain the integrity of the in-stadium experience while leveraging digital platforms to enhance fan engagement globally. We are always vigilant about potential challenges but view them as opportunities for growth and innovation.

Innovation Spotlight

Uniting fans at the Game4Ukraine Fanzone

Game4Ukraine charity match leveraged immersive tech to engage fans worldwide in supporting the United24 initiative.



In a historic display of solidarity, football legends gathered at Stamford Bridge for Game4Ukraine, championing the United24 initiative to rebuild a school in Ukraine. Partnering with Cheeer, we aimed to amplify engagement and introduce innovative fundraising methods.

We launched the Game4Ukraine Virtual Fanzone, a digital replica of Stamford Bridge. This interactive space featured daily games, prizes and a unique donation method: fans could customise and purchase digital jerseys, with proceeds supporting the cause.

This initiative resulted in the creation of over 100 digital assets and attracted thousands of fans to the virtual space. Campaign-related content received more than 800,000 impressions on Instagram.

This collaboration demonstrated how innovation can blend with philanthropy, opening new pathways for supporting meaningful causes while bringing fans closer to the game and the ideals of unity and positive change.



100+

The number of digital assets created.

Web3



Pioneering Perspectives

Transforming sports fan engagement with Fan Tokens



Alexandre Dreyfus
Founder and CEO
of Chiliz and Socios.com



What role do Web3 technologies play in enhancing sports fan experiences and building fan communities?

Web3 is an incredibly powerful technology for building and empowering communities, and that's what sports fandom is all about. This is one of the main reasons why fan engagement solutions such as Fan Tokens have been so rapidly and widely adopted: they've provided an efficient solution to a pressing need. **Sports fans want recognition and a sense of belonging**, especially those millions of fans who don't get access to the stadium each week and have to show their support from hundreds or thousands of miles away. **Through the ownership of digital assets, clubs, and brands can strengthen that sense of belonging in an easy and scalable way.** Additionally, they can reward those fans in a way that is truly meaningful for them. And, very importantly, they can do all this directly, without relying on third-party platforms, meaning they are in full control of the relationship with their fans and their data.

How do blockchain-based solutions like Fan Tokens contribute to revenue generation for sports teams and clubs? How do Chiliz's Fan Tokens impact fan engagement and loyalty?

Fan Tokens work like a key that unlocks a new generation of membership schemes focused primarily on meeting the demands of two crucial communities: the younger, digital-native, and global fans. **Owning Fan Tokens allows fans to participate in club decisions like designing team kits, choosing merchandise, stadium songs, squad numbers, etc.** This is especially significant for global fans who typically lack such opportunities. **Holding Fan Tokens also grants access to VIP experiences like playing at the stadium, joining official photoshoots, or announcing at matches.** This is very appealing to the younger generations demanding innovative ways of experiencing their passion.

These experiences are accessed through a gamified EngageToEarn model. Fans earn Reward Points each time they interact with the multiple club-themed features of the Socios.com app, and they use these Reward Points to redeem experiences easily, directly on the app.

Fan Tokens generate direct revenue for the teams since they make roughly 50 percent of each Fan Token sold. However, they can generate additional revenue since the clubs can use their Fan Tokens to activate other partner-

“

Fan Tokens work like a key that unlocks a new generation of membership schemes focused primarily on meeting the demands of two crucial communities: the younger, digital-native, and global fans.

ships and sponsorships through the Socios.com platform. **The app has over 2,2 million users across more than 160 countries, making it an extremely powerful marketing platform for any brand looking to connect with the sports fan community.**

What advice would you give to sports organisations looking to integrate blockchain technology into their fan engagement strategies?

My first advice would be to move quickly because technology evolves very rapidly, and what is innovative today may be outdated tomorrow. But moving quickly doesn't mean integrating new technologies just for the sake of it, jumping on whatever product or solution is trending, or trying to replicate whatever has worked for other brands. You need to do internal research and consultation and learn about your communities, what they like, and what they demand from your brand. Then, determine what challenges your internal teams face in meeting those demands. Once you gather all this information, do some external research to see which tools and solutions in the market can best help you address those challenges and create a long-term and sustainable strategy to ensure that integrating blockchain will bring value across the entire organisation. I would also suggest brands looking to incorporate blockchain to educate all

their internal stakeholders so they understand the nature and the value of the technology and can leverage it to its full potential.

How do you envision the future of sporting experiences and entertainment?

Visiting the locker room hours before a match, watching the players warm up from the sidelines... These experiences were unthinkable a few years ago and our Fan Token holders enjoy them on a weekly basis. Venues are overcoming huge transformations to embrace technology and make the stadium experience even more attractive for the fans. I think **the biggest changes will come in how fans at home experience sports since these fans make up more than 99 percent of the fanbase of the big clubs and properties, and it's crucial to keep them engaged and enhance their experience.** As VR, AR, and other immersive tools evolve and become more affordable and widely adopted, we'll see a complete transformation in how we experience sports at home. Our vision is for Fan Tokens to play a key part in unlocking access to these immersive realities.

Innovation Spotlight

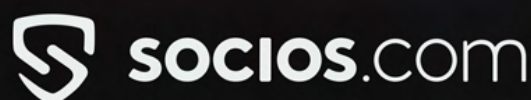
Engaging & rewarding fans with Fan Tokens

More than 80 organisations across the global sports industry use these innovative digital utility assets to engage, empower and reward their fanbases.



80+
partners

Including Man City,
PSG, FC Barcelona
and Juventus.



Socios.com Fan Tokens

Created by Chiliz, the leading blockchain provider for sports and entertainment, Fan Tokens are digital utility assets minted on the Chiliz Chain that unlock a new generation of loyalty schemes tailored to the needs of two key communities: the younger generations, who are the future of the sports industry, and the global fans, who make up more than 99% of the fanbase of the top organisations.

Holding Fan Tokens allows fans to engage in unprecedented ways with their teams. Fan Token holders can participate in club decisions by voting on polls, access-

ing unique promotions, and earning exclusive rewards, from signed jerseys to once-in-a-lifetime experiences, just for doing what they always do: engage with their team.

Manchester City, Paris Saint-Germain, FC Barcelona, Inter Milan, Flamengo, the UFC, and the Davis Cup are among the 80+ brands that have launched their Fan Token on the Socios.com platform, which has more than 2.2 million users.

Innovation Spotlight

Elevating fan engagement in Formula 1

The BWT Alpine F1 Team, Kappa France, and ZATAP partnered up to present a limited-edition jersey equipped with ZATAP technology, offering fans exclusive opportunities.



Elevating fan engagement in Formula 1

CHALLENGE

Enhance fan experience and introduce Alpine Fan Token from Binance.

The BWT Alpine F1 team wanted to offer greater value to their partner, Binance, and to amplify the number of tokens claimed through innovative technology, thereby enhancing overall engagement and interaction.



48.65% tapping rate

Almost half of the buyers interacted with the product.

SOLUTION

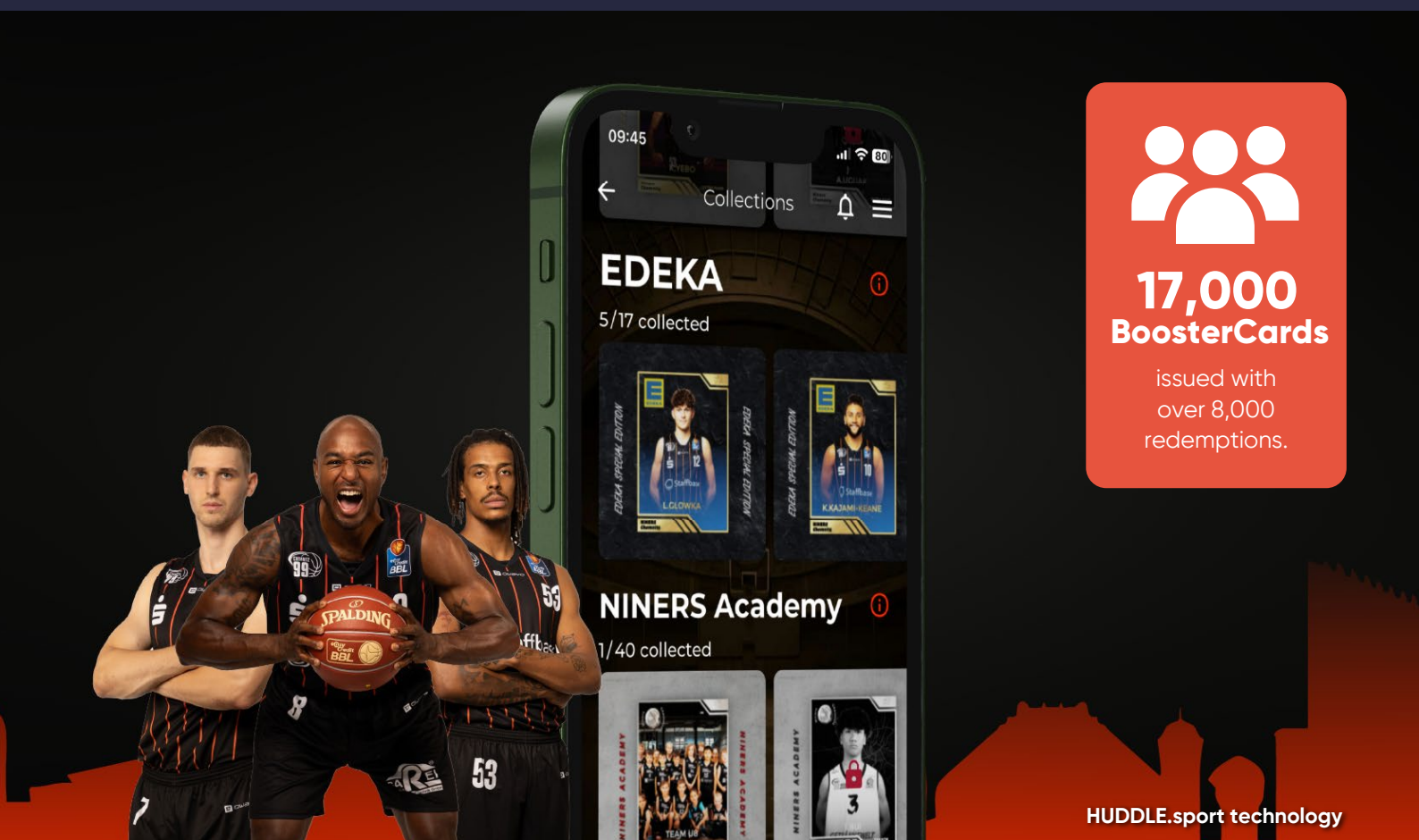
Phygital jersey with easy and effortless claim of Alpine Fan Token.

Alpine released a phygital jersey powered by ZATAP, incorporating an encrypted NFC tag that gave each jersey a unique ID. Fans who registered ownership of their jersey got access to exclusive content and opportunities around the Mexico GP, including the chance to meet the drivers in Mexico and get insights from the team's engineers. Additionally, fans could easily claim their Alpine Fan Token from Binance, Alpine's blockchain sponsor.

Innovation Spotlight

Fans to customers: digital sponsorship revolution

NINERS Chemnitz and Edeka – a unique partnership demonstrating how fan loyalty can be transferred to sponsors through the virtual Panini effect.



Digital sports sponsorship eliminates the boundaries of traditional advertising boards, as evidenced by the partnership between NINERS Chemnitz and Edeka.

The goal?

To transform NINERS fans into passionate supporters of Edeka, thereby boosting sales.

The process?

A virtual Panini effect made possible by the power of HUDDLE.sport technology: Customers secured a NINERS BoosterCard with an iQR code with a purchase of 30€.

By scanning the code, they accessed the digital NINERS world and received an NFT player card. Here, fans could collect, trade, and complete collections of different player cards – pure collecting fever!

The result?

With impressive results, including a **40% conversion rate**, **30% new customers**, and a **fivefold scaling effect through influencers**, this demonstrates how digital strategies can effectively transfer fan loyalty to sponsors and boost sales.

HUDDLE.sport technology

Innovation Spotlight

Engaging football fans with digital memorabilia

FC Twente enriches fan experience using unique digital assets in the Dutch Premier League.



FC Twente live-triggered NFTs

“

By investing in this project, we see the opportunity to deepen connections with our younger fans and better understand their needs and preferences.

FC Twente embarked on a journey to forge an immersive connection with fans and boost engagement, particularly among younger supporters. In partnership with Cheer and Sportradar, we created lasting digital memories by minting live-triggered NFTs for goals and wins during the 2022/2023 season. These NFTs allowed fans to capture the excitement of each goal and own a piece of it as unique memorabilia. Additionally, these NFTs could be redeemed for exclusive offline prizes.

By integrating digital assets with real-world rewards, we enhanced the interactive experience for our supporters and built a dedicated fan base actively participating in

the club's future innovations.

The campaign resulted in:

- **Over 60 unique digital assets minted and collected**
- **12 winners of exclusive real-life merchandise**
- **Meet and greet events with core fans to drive innovation**
- **Recognition from the Eredivisie for this innovative initiatives**

“

At Drone Champions League, we craft virtual environments and digital replicas of iconic locations to stage our drone races. Naturally, we are keen to use virtual spaces also for pilots to interact with each other and with their fans. While these digital interactions can't substitute for in-person experiences, they offer a unique platform for our globally dispersed pilots, who are already well-acquainted with virtual reality, to connect and collaborate.



Manuel Urban
Director of DCL

Pioneering Perspectives

Football's evolution: balancing tradition and technology



Georg Pangl

Founder of Pangl Football Group,
Former UEFA Executive



With your extensive involvement in football over the years, how have you observed the transformation of fan experiences over time?

I started in football back in 1986, when everything was quite analog. We wrote letters, and even fax machines were rare. Despite the huge technological changes, the core emotion for fans remains the same. The advent of technology has made reaching young fans easier through various platforms, which is essential for creating unforgettable experiences. Regardless of the money involved, **the passion and emotion of fans are still the most important aspects.**

Speaking of experiences, how do you see the role of technology in enhancing fan engagement today compared to 30 years ago?

Technology has transformed fan engagement significantly. For instance, when I managed events at Old Trafford, we didn't even have smartphones. People needed cameras to capture moments with stars or trophies. Now, digital platforms are crucial. **Social media, mobile apps, and AI are becoming integral to the fan experience,** allowing fans to interact with the game and each other in real-time. Despite these changes, the emotional connection to the game remains. For instance, I believe sustainability can become a game changer in football,

with apps like Ummadum helping fans travel sustainably, thus reducing CO2 emissions. AI also plays a big role in player analysis and could further enhance fan engagement.

Do you see a change in youth interest levels?

While the ways of consuming football have changed, the essence remains the same. **Younger fans use multiple channels simultaneously,** which was unheard of 30 years ago. They might have apps for live commentary, sports betting, social media interactions, and more, all while watching the game. However, the core experience of watching a game and the emotions involved haven't changed. I personally prefer to watch games without many distractions, focusing solely on the match. It's fascinating to see how technology shapes their experience, but **the love for the game itself is timeless.**

Innovative formats like the King's League are gaining popularity. Do you think they will replace traditional football?

Innovations in sports are natural and welcomed, but they won't overshadow traditional football. These new formats are great for keeping people active and engaged. They add variety and excitement but can't replicate the essence of a traditional football match. **The new formats**



“

Football's simplicity and raw emotion are its biggest strengths. While innovation is inevitable and often beneficial, it should enhance rather than overshadow these core elements.

can coexist, offering different kinds of excitement.

There's a lot of discussion about changes in football rules and the increasing use of tech like VAR. What's your take on this?

I'm not a fan of VAR (Video Assistant Referee). I believe it complicates the game unnecessarily. Football should remain simple and true to its roots. Decisions should be quick and clear, not prolonged by technology. With its imperfections, the human element is part of what makes football exciting.

How do you see the balance between tradition and innovation in football?

Maintaining the balance is crucial. Football's simplicity and raw emotion are its biggest strengths. While innovation is inevitable and often beneficial, it should enhance rather than overshadow these core elements. For example, data analytics can offer deeper insights into the game but shouldn't replace the fundamental experience. **Innovations should be used to support and improve the game, not transform it entirely.** The essence of football, with its simple rules and emotional appeal, should always remain intact.

With the rise of digital entertainment, do you see a shift in how sports are consumed?

Absolutely. E-sports and digital platforms offer new ways to engage and can attract different audiences. However,

traditional sports like football have a physical and emotional aspect that digital entertainment can't fully replicate. The excitement of being in a stadium and the collective experience of the game are irreplaceable. E-sports and digital innovations are complementary, offering new dimensions without replacing the traditional experience.

So, football should retain its simplicity, but the way we experience it can evolve with tech?

Exactly. The purity of the game should remain intact, but leveraging technology to enhance the overall experience is beneficial. **Data, gamification, and new ways to interact with the game can add to the excitement without changing the essence of football.** It's about finding the right balance. Football should stay true to its roots while **embracing innovations that enhance the fan experience** and make the game more accessible and engaging.

CHAPTER 4

Benchmark Analysis

“

Given that the Mina Cup is a youth tournament attracting audiences aged 16 and under, exploring innovative strategies to engage young athletes and their fans is crucial. As they are familiar with virtual worlds through gaming and similar digital adventures, we want to enrich the tournament with immersive experiences resonating with their interests.



Chris Brown
Founder of the Mina Cup

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CHAPTER 4

Benchmark analysis

- 119 Methodology
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- 130 Website Traffic Results
- 134 Instagram Engagement Results

Methodology

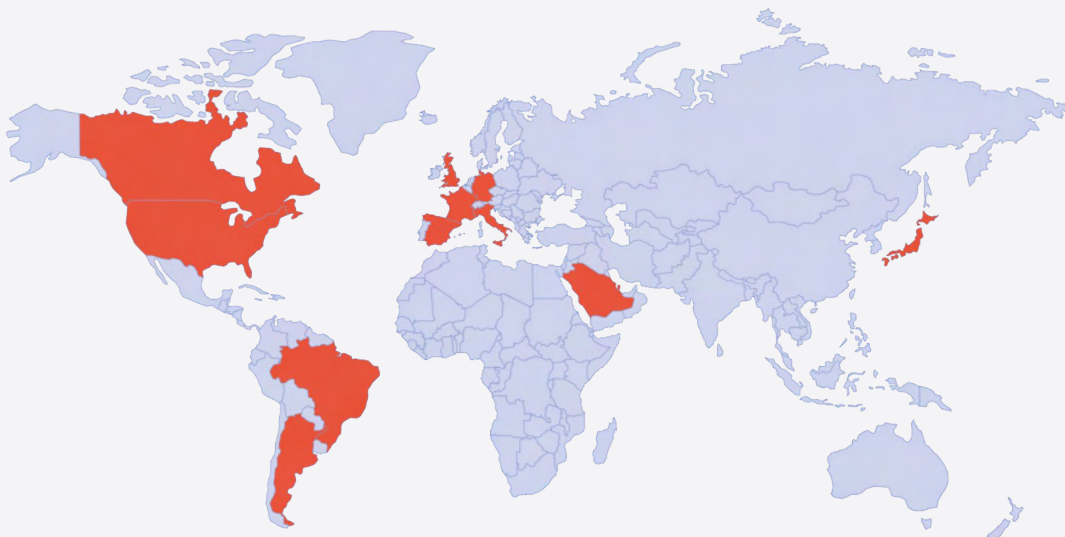
Website performance, user demographics, and Instagram engagement.

To create the benchmark overview, we have examined the digital presence of top football and other sports clubs by analysing data from the Semrush database for the year 2023. This entails analysis of teams' official website domains and pages, as well as their Instagram pages. Specifically, we examined these metrics: **user demographics, device usage, visits, unique visitors, bounce rate, average session duration, pages per visit, and Instagram total engagement.**

In order to have a clear comparison between football and other sports, we have prepared and analysed two samples of 100 clubs, called "Football Clubs" and "Other Sports Clubs." In the upcoming sections, all results will be presented separately for these two categories.

For the **Football Clubs**, we have compiled a list of the **100 biggest clubs** using financial reports. Ninety-four of these clubs were from the European "Big Five" leagues with the highest revenues: the Premier League (England), Serie A (Italy), La Liga (Spain), Bundesliga (Germany) and Ligue 1 (France). Additionally, six clubs from the United States, Argentina, Brazil, Saudi Arabia, Japan, and Qatar were selected based on their valuation in local leagues.¹

Conversely, for the Other Sports Clubs category, we have curated a list of **100 clubs** from Forbes' rankings of the world's most valuable teams in 2023.^{2,3} This list includes teams from the NFL, NBA, MLB, Formula 1, and NHL.



Important note !

The findings presented in this report are based on data obtained from the Semrush platform, though it is important to note that there may be instances of inaccuracies. Occasionally, adjustments to calculations may be made due to missing data that was not accessible via the platform. Additionally, we are unable to fully scrutinise the methodologies or data retrieval processes employed by Semrush due to their internal procedures. When referencing changes over time, the figures provided utilize the data available at the time of report production and may not account for future adjustments.

The data received from Semrush can be categorised into two types: absolute and relative.

The first category includes data for Visits, Unique Visitors, and Instagram Engagement, while the second category presents data for Bounce Rate, Average Session Duration, and Pages per Visit. In the first category, the following approach was taken to compute the mean: dividing the absolute values from Semrush by the number of months and by the number of clubs. By doing so, we received the monthly mean for a singular club. For the second category of data, another approach was taken because of the relative nature of data (percentages, fractions, etc.). Therefore, the mean was calculated based on all the values presented by Semrush.

¹ Liste der Sportligen nach Umsatz, 2023 & transfermarkt.at

² Wabwile, A. (2023, August 23). 100+ most valuable sports franchises in the world (2024). Briefly. <https://briefly.co.za/facts-lifehacks/top/166020-valuable-sports-franchises-world/>

³ Ozanian, M., & Teitelbaum, J. (2023, December 14). The Most Valuable NHL Teams 2023. Forbes. <https://www.forbes.com/sites/mikeozanian/2023/12/14/the-most-valuable-nhl-teams-2023/>

— 200 —

Sports Clubs Analysed



Visits

Unique Visitors

Bounce Rate

Average Session Duration

Pages per Visit

Instagram Total Engagement



User Demographics



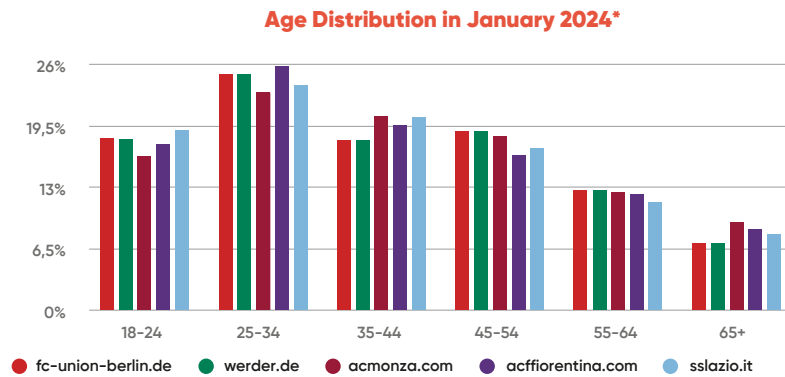
Device Usage



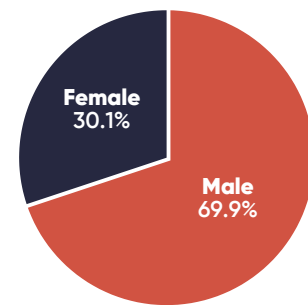
Benchmark

User Demographics

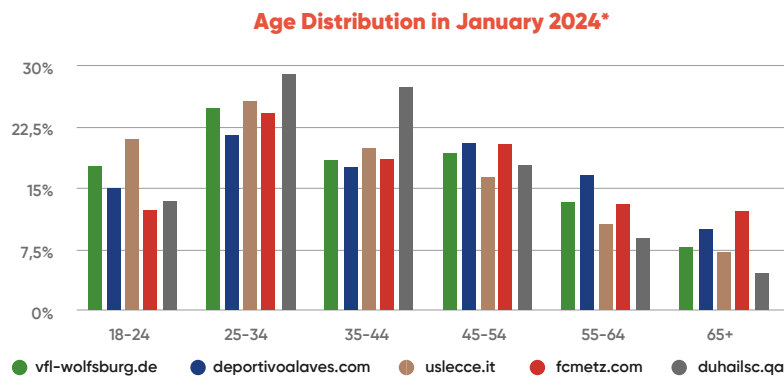
High performing **Football Clubs'** domains (based on the Average Session Duration):



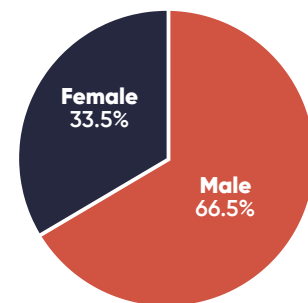
Average Gender Distribution in 2023**



Low performing **Football Clubs'** domains (based on the Average Session Duration):



Average Gender Distribution in 2023**



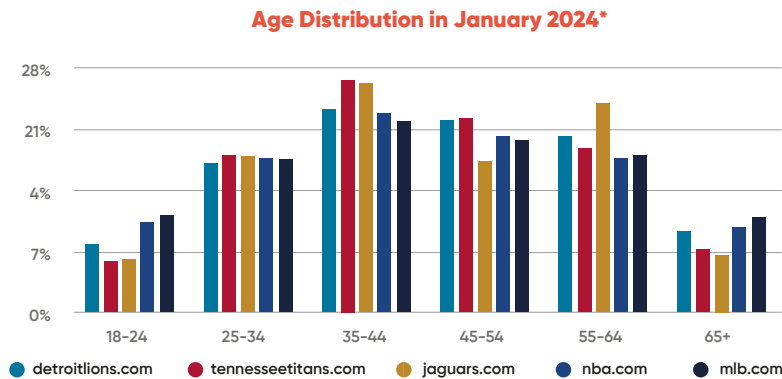
*Age distribution data in January 2024 is extracted from Semrush.

**Gender distribution is calculated as an average from the Semrush data on each month of 2023.

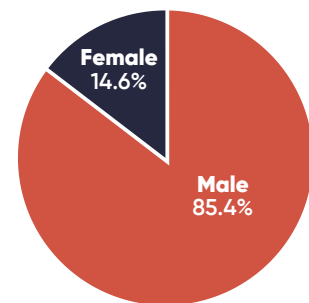
Benchmark

User Demographics

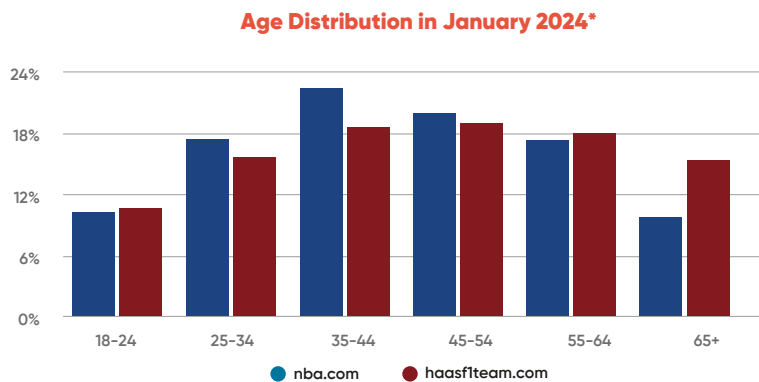
High performing Other Sports Clubs' domains (based on the Average Session Duration):



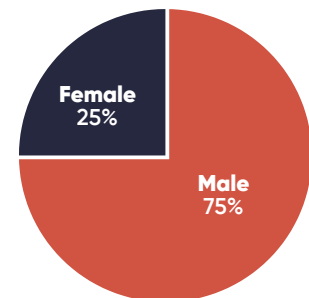
Average Gender Distribution in 2023**



Low performing Other Sports Clubs' domains (based on the Average Session Duration):



Average Gender Distribution in 2023**



*Age distribution data in January 2024 is extracted from Semrush.

**Gender distribution is calculated as an average from the Semrush data on each month of 2023.

“

Live sports data epitomizes the nexus of innovation, where real-time insights fuel the evolution of the sporting experience. In leveraging disruptive technologies, we not only enhance the excitement of the game but also redefine how fans, athletes, and stakeholders engage with the dynamic landscape of sports.



Rainer Geier
Sportradar

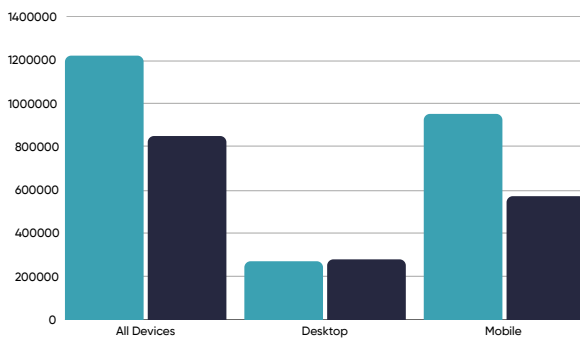
Benchmark

Football Other Sports Clubs

Visits

Visits represent the estimated total visits to the website during the period under consideration.¹

Average Monthly Visits of a club's official domain/page by Device Type in 2023*



manutd.com
13,217,722



average
1,220,264

duhailsc.qa
2,504

packers.com
4,527,803



average
848,543

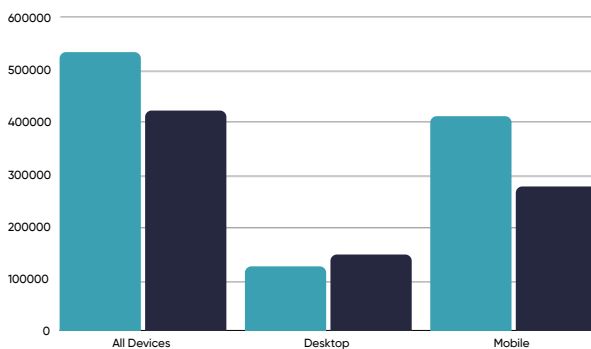
nba.com/hawks/
103,326

**Based on the average monthly visits from all devices in 2023.

Unique Visitors

Unique Visitors represent the estimated total unique visitors to the website during the period under consideration.²

Average Monthly Unique Visitors of a club's official domain/page by Device Type in 2023*



realmadrid.com
6,085,698



average
533,954

duhailsc.qa
2,191

dallascowboys.com
1,202,797



average
421,817

nba.com/thunder/
88,746

¹ Semrush Traffic Analytics 101: Analyzing Competitors' Traffic. (n.d.). Semrush. <https://www.semrush.com/kb/895-traffic-analytics-overview-report>

² Ibid.

*The absolute numbers from Semrush for 2023 were divided by 12 (months in a year) to have a monthly average and then divided by 100 (number of clubs) to have a monthly mean value for a club.

**Based on the average monthly unique visitors from all devices in 2023.

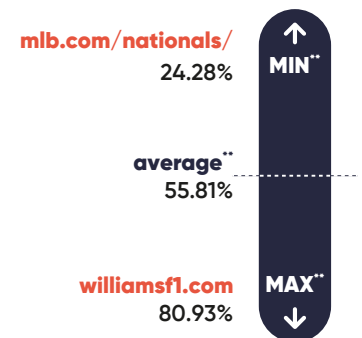
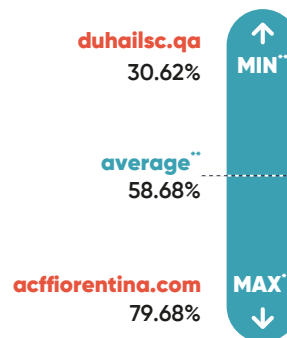
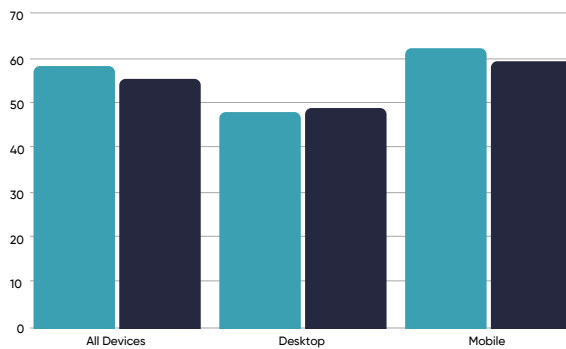
Benchmark

● Football ● Other Sports Clubs

Bounce Rate (%)

Bounce Rate represents the percentage of visitors who leave the website after seeing just one page.¹

Average Bounce Rate percentage of a club's official domain/page by Device Type in 2023*

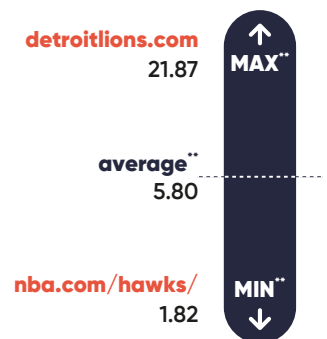
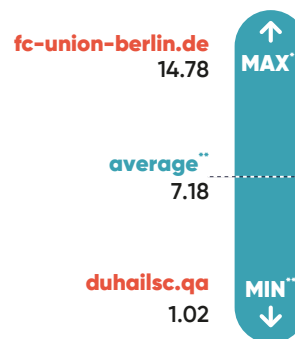
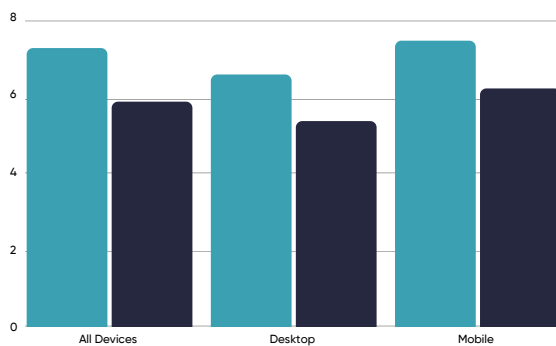


*Based on the average bounce rate percentage in 2023, all devices.

Average Session Duration

Average Session Duration represents the average amount of time visitors spend on the website.²

Average Session Duration (minutes) for a club's official domain/page by Device Type in 2023*



¹ Semrush Traffic Analytics 101: Analyzing Competitors' Traffic. (n.d.). Semrush. <https://www.semrush.com/kb/895-traffic-analytics-overview-report>

² Ibid

*The absolute numbers from Semrush for 2023 were divided by 12 (months in a year) to have a monthly average and then divided by 100 (number of clubs) to have a monthly mean value for a club.

**Based on the average session duration in 2023, all devices.

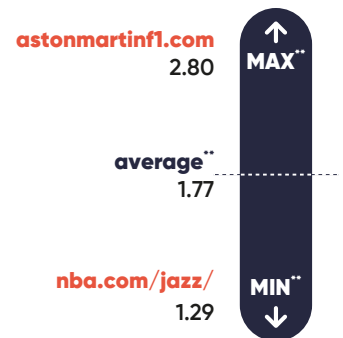
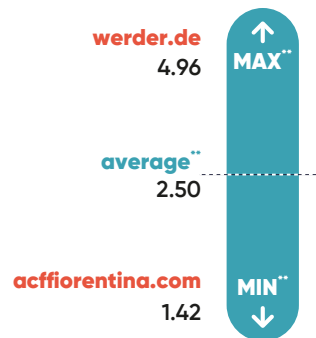
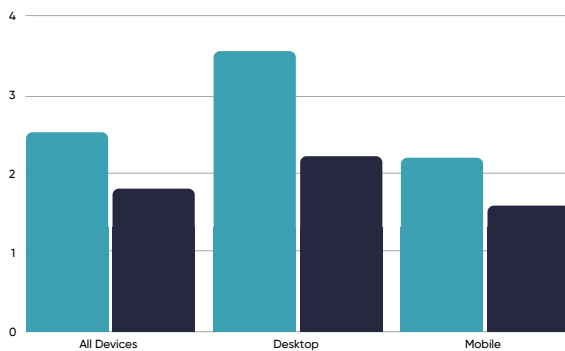
Benchmark

Football Other Sports Clubs

Pages per Visit

Pages per Visit represents the average number of pages a person visits in one session on the website.¹

Average number of pages viewed during one visit of a club's official domain/page by Device Type in 2023*



¹ Semrush Traffic Analytics 101: Analyzing Competitors' Traffic. (n.d.). Semrush. <https://www.semrush.com/kb/895-traffic-analytics-overview-report>

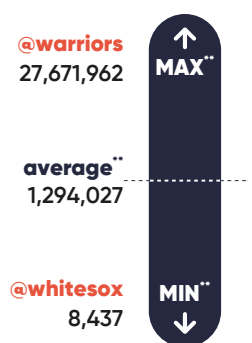
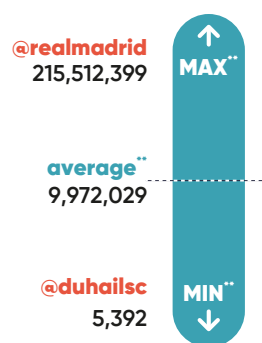
*The average number of pages viewed during one visit of a club's official domain/page was calculated based on the yearly data from Semrush for 2023.

**Based on the average pages per visit in 2023, all devices.

Instagram Total Engagement

Total Engagement on Instagram represents the sum of all the likes and comments on posts.²

Average monthly club's Instagram total engagement in 2023*



² Engagement Rate in the Social Tracker. (n.d.). Semrush. <https://www.semrush.com/kb/630-how-do-you-measure-engagement-rate-in-the-social-media-tool#total>

*The absolute numbers from Semrush for 2023 were divided by 12 (months in a year) to have a monthly average and then divided by 100 (number of clubs) to have a monthly mean value for a club.

**Based on the average monthly Instagram engagement in 2023.

“

I believe that in sports, as in life, innovation is the key to staying ahead of the game. Whether it's adopting new training techniques, harnessing cutting-edge technology, or implementing strategic innovations in gameplay, those who embrace change are the ones who will excel. As leaders, it's our responsibility to foster a culture of innovation, empowering our teams to push boundaries and constantly strive for improvement. In the end, it's not just about winning on the scoreboard – it's about innovating, adapting, and ultimately, achieving greatness.



Dieter Kalt
Austrian Ice Hockey
Professional

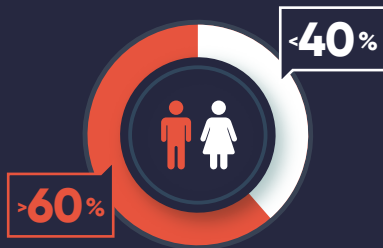
Learnings Overview

Key Findings

● Football ● Other Sports Clubs

User Demographics

The results for the clubs with the highest time spent on their websites.



The predominant fan base across all clubs is male.



The predominant age groups.

Website Traffic



Football Clubs demonstrate better performance in terms of average monthly visits and unique visitor counts.

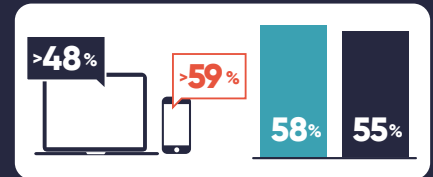


The traffic results indicate a significant mobile user base.



6,085,698
monthly unique visitors in 2023

Real Madrid sets a benchmark in digital engagement.



On average, more than half of visitors leave the websites after viewing just one page (all devices).

User Engagement



On average, fans spend less than 10 minutes on clubs' websites.



The average number of pages viewed per visit is below 3.

Social Media



9,972,029
1,294,027

On average, Football Clubs achieve about 8 times the total monthly engagement on Instagram compared to Other Sports Clubs. Despite these differences, both samples demonstrate Instagram's outstanding performance as a channel for sports fan engagement.

Learnings Overview

Strategic Implications

In the first segment of the Virtual Sports Fan Report, we analysed virtual sports fan engagement, focusing on the website traffic, engagement metrics, and social media performance of 200 sports clubs.

This benchmark highlights the necessity of crafting tailored strategies to enhance digital presence and bolster virtual sports fan engagement. We assume that different innovative strategies can be implemented in order to improve performance, which we delve into in the upcoming segments of our report.

Strategic implications include:

- ▶ Developing content strategies aimed at increasing time spent and pages visited on websites, potentially through more engaging, interactive content or enhanced user experience.
- ▶ Tailoring content and engagement strategies to the younger demographic profiles to accommodate demographic shifts and cater to the growing attention of younger audiences.
- ▶ Adapting to emerging technologies and integrating these advancements into fan engagement strategies to ensure competitiveness in the evolving digital landscape.



Website Traffic Results

Football Clubs

1/2

Domain	Avg. Monthly Visits	Avg. Monthly Unique Visitors	Avg. Visit Duration (min.)	Pages/Visit	Bounce Rate (%)
acfflorentina.com	240,695	145,242	12:35	1.42	79.68
acmilan.com	2,779,080	1,137,418	06:28	3.01	55.02
acmonza.com	170,924	75,419	14:06	2.29	59.95
alhilal.com	113,581	79,283	06:52	2.01	66.84
arsenal.com	8,906,280	3,418,261	07:56	2.16	60.21
asmonaco.com	201,777	123,127	05:43	2.65	61.77
asroma.com	1,644,167	686,612	06:50	2.98	50.62
atalanta.it	160,814	88,306	03:55	3.33	56.03
athletic-club.eus	749,800	351,205	07:51	1.71	70.83
atleticodemadrid.com	957,019	489,675	06:25	3.36	48.94
avfc.co.uk	1,924,567	667,314	07:59	2.78	65.49
bayer04.de	494,864	181,793	09:21	3.12	46.56
bolognafc.it	314,772	86,360	06:59	2.79	54.07
borussia.de	504,279	206,112	06:38	3.03	53.99
brentfordfc.com	470,490	250,385	06:40	2.37	61.46
brightonandhovealbion.com	880,309	479,262	06:18	2.73	59.85
burnleyfootballclub.com	359,619	173,162	07:49	2.24	62.01
bvb.de	2,267,957	829,177	06:07	2.67	50.43
cadizcf.com	188,815	102,056	06:35	2.28	61.58
cagliaricalcio.com	163,098	82,870	05:21	2.45	52.35
cariverplate.com.ar	959,529	457,006	08:00	1.63	70.97
chelseafc.com	4,838,523	2,327,822	09:22	2.43	62.98
clermontfoot.com	87,811	43,127	04:38	2.89	51.5
cpfc.co.uk	571,033	335,910	07:46	1.99	73.35
deportivoalaves.com	65,882	36,913	03:28	1.87	61.37
duhailesc.qa	2,504	2,191	01:01	1.91	30.62
eintracht.de	1,228,130	461,140	11:36	3.2	49.77
empolifc.com	48,877	27,343	09:26	2.14	53.47
evertonfc.com	1,158,619	578,045	06:29	2.43	65.97
fc-heidenheim.de	95,341	52,399	05:12	1.98	56.29
fc-union-berlin.de	858,100	277,396	14:47	1.93	63.21
fc.de	635,853	232,407	05:26	2.46	51.39
fcaugsburg.de	159,243	72,071	06:04	2.54	56.38
fcbarcelona.com	4,809,980	2,568,712	06:20	2.53	59.16
fcbayern.com	3,821,018	1,886,731	08:37	2.95	61.42
fcorient.bzh	74,938	36,400	09:06	2.57	54.77
fcmetz.com	135,066	77,303	02:39	2.2	55.96
fcnantes.com	850,522	207,242	12:28	4.08	42.18
frosinonecalcio.com	45,593	30,960	04:25	1.95	67.23
genoafc.it	192,568	70,254	04:49	2.72	41.3
getafecf.com	81,259	42,362	08:13	1.77	71.18
gironafc.cat	251,318	97,662	04:22	2.46	50.63
granadacf.es	164,571	96,996	09:22	1.85	69.65
hac-foot.com	167,657	62,862	07:47	4.12	40.88
hellasverona.it	72,379	41,201	04:45	2.07	58.38
inter.it	2,491,357	1,069,344	08:20	3.08	59.7
intermiamicf.com	1,070,021	640,034	03:59	1.97	54.87
juventus.com	2,055,497	934,939	07:33	2.88	51.35
liverpoolfc.com	8,502,871	3,425,940	09:28	2.57	66.09
losc.fr	214,494	107,672	05:32	2.75	55.25

Website Traffic Results

Football Clubs

2/2

Domain	Avg. Monthly Visits	Avg. Monthly Unique Visitors	Avg. Visit Duration (min.)	Pages/Visit	Bounce Rate (%)
lutontown.co.uk	361,245	217,164	04:44	1.91	65.26
mainz05.de	174,458	87,918	07:40	1.92	57.96
mancity.com	7,067,489	2,671,462	06:54	2.86	53.19
manutd.com	13,217,722	5,466,254	07:07	2.4	62.1
mhscfoot.com	73,972	45,157	04:16	2.16	58.71
nottinghamforest.co.uk	652,909	355,000	07:10	1.96	70.59
nufc.co.uk	1,778,640	820,033	06:40	2.5	60.45
ogcnice.com	317,543	131,471	03:33	3.65	54.71
ol.fr	1,073,979	376,666	09:23	2.97	52.59
om.fr	1,534,541	644,376	06:12	3.04	55.25
osasuna.es	395,639	210,567	05:39	1.88	69.07
palmeiras.com.br	1,189,626	685,756	06:42	1.59	72.41
psg.fr	3,701,484	1,753,244	06:43	3.27	53
rayovallecano.es	53,327	39,932	04:11	1.62	77.54
rbleipzig.com	642,155	226,304	10:09	3.69	56.56
rccelta.es	195,067	116,907	09:15	2.79	57.75
rcdmallorca.es	158,889	56,247	07:59	1.99	49.39
rc Lens.fr	576,790	174,091	08:58	3.92	45.32
rcstrasbourgsace.fr	282,388	108,188	05:20	2.45	51.22
realbetisbalompie.es	771,993	342,236	10:21	2.69	64.6
realmadrid.com	12,911,765	6,085,698	06:56	2.11	65.9
realsociedad.eus	380,021	184,833	09:09	2.49	51.09
salernitana.it	89,151	38,766	11:21	2.03	63.5
sassuolocalcio.it	81,506	47,731	05:45	2.8	56.49
sb29.bzh	58,041	27,780	06:48	4.2	43.7
scfreiburg.com	324,457	144,781	04:49	2.09	53.24
sevillaafc.es	1,246,887	525,694	08:11	2.35	61.2
sscnapoli.it	855,752	455,922	05:32	2.64	57.08
sslazio.it	559,786	234,210	12:30	1.54	72.17
stade-de-reims.com	91,492	59,567	04:56	2.7	55.1
staderennais.com	331,357	144,257	05:34	3.08	52.19
sufc.co.uk	221,449	114,119	08:04	1.73	77.62
sv98.de	179,105	79,487	06:06	2.55	56.81
torinofc.it	241,107	125,539	07:44	1.74	67.96
tottenhamhotspur.com	3,459,634	1,578,823	06:26	2.04	61.71
toulousefc.com	356,412	132,347	08:13	3.59	51.21
tsg-hoffenheim.de	247,706	128,468	05:07	2.36	69.15
udalmeriasad.com	69,002	38,459	10:13	1.81	61.52
udinese.it	126,179	60,180	05:44	2.04	54.51
udlaspalmas.es	157,284	87,915	09:14	2.47	62.42
urawa-reds.co.jp	1,767,744	451,543	07:53	2.19	61.43
uslecce.it	157,554	72,034	03:28	1.6	68.14
valenciacf.com	476,454	286,479	11:02	1.68	75.67
vfb.de	864,226	283,523	09:08	3.11	51.79
vfl-bochum.de	104,237	52,921	05:21	1.67	65.38
vfl-wolfsburg.de	182,165	93,799	03:30	3.03	49.13
villarrealcf.es	207,043	124,736	04:59	2.16	56.56
werder.de	901,461	269,337	14:28	4.96	39.98
whufc.com	1,132,136	589,668	04:58	2.06	63.66
wolves.co.uk	822,013	394,386	06:26	2.21	69.05

Website Traffic Results

Other Sports Clubs

1/2

Domain/Page	Avg. Monthly Visits	Avg. Monthly Unique Visitors	Avg. Visit Duration (min.)	Pages/Visit	Bounce Rate (%)
49ers.com	1,774,051	1,036,063	05:15	1.58	68.67
astonmartinfl.com	326,923	225,740	06:37	2.8	65.12
atlantafalcons.com	882,034	312,777	07:47	2.17	45.15
azcardinals.com	574,482	329,583	06:04	1.9	68.53
baltimoreravens.com	1,582,653	812,612	08:02	1.92	64.75
bengals.com	1,127,727	573,267	04:38	1.96	59.39
buccaneers.com	765,165	473,590	05:14	1.9	65.7
buffalobills.com	1,527,070	945,557	06:41	1.84	68.44
chargers.com	592,769	374,477	08:51	2.07	64.53
chicagobears.com	1,530,972	796,753	06:54	1.95	68.31
chiefs.com	1,718,832	983,981	06:13	2.22	60.39
clevelandbrowns.com	1,040,718	534,295	05:55	1.93	62.72
colts.com	1,278,031	505,919	06:36	2.44	54.31
commanders.com	597,360	394,131	06:53	1.89	65.85
dallascowboys.com	3,250,807	1,202,797	08:47	2.46	53.12
denverbroncos.com	870,737	498,327	05:54	1.91	68.73
detroitlions.com	2,136,646	762,993	21:52	2.72	63.22
giants.com	1,056,064	654,932	08:02	1.98	62.35
haasflteam.com	127,911	103,899	02:07	1.58	76.04
houstontexans.com	593,285	368,680	09:08	2.19	65.35
jaguars.com	1,713,245	417,192	09:37	2.36	46.7
mavs.com	335,958	214,543	04:44	1.54	70.11
mercedesamgfl.com	712,507	476,047	07:01	2.17	66.64
miamidolphins.com	697,888	484,981	04:08	2.1	64.23
mlb.com/angels/	906,209	511,192	04:43	1.83	43.43
mlb.com/astros/	1,171,030	449,083	07:30	2.75	44.99
mlb.com/bluejays/	897,019	539,306	04:03	1.69	51.32
mlb.com/braves/	2,363,434	545,195	06:58	1.59	45.46
mlb.com/brewers/	1,132,125	398,629	07:01	1.86	37.65
mlb.com/cardinals/	955,964	473,448	06:31	1.94	45.98
mlb.com/cubs/	1,457,647	616,929	04:38	1.71	44.56
mlb.com/dbacks/	398,235	334,942	03:49	1.88	42.1
mlb.com/dodgers/	1,801,600	613,730	07:03	2	38.51
mlb.com/giants/	969,704	449,716	05:28	1.91	51.59
mlb.com/guardians/	666,894	274,582	09:21	1.78	48.77
mlb.com/mariners/	723,434	527,230	03:09	1.68	41.88
mlb.com/mets/	1,293,498	519,564	05:44	1.67	51.39
mlb.com/nationals/	897,070	315,005	05:13	1.74	24.28
mlb.com/orioles/	593,873	375,489	05:36	1.87	41.11
mlb.com/padres/	1,010,565	442,675	04:44	1.74	33.89
mlb.com/phillies/	1,466,276	600,607	07:44	1.89	43.21
mlb.com/pirates/	859,834	337,574	06:57	1.62	48.52
mlb.com/rangers/	987,222	447,590	05:19	1.87	28.2
mlb.com/rays/	762,335	409,890	05:14	1.81	47.75
mlb.com/reds/	1,004,741	427,363	06:55	1.7	52.17
mlb.com/redsox/	1,349,603	682,540	05:06	1.73	53.3
mlb.com/rockies/	517,257	297,780	05:49	1.72	48.9
mlb.com/royals/	1,314,897	248,907	07:33	1.68	42.59
mlb.com/tigers/	493,669	280,031	04:48	1.79	37.38
mlb.com/twins/	640,910	363,382	04:51	1.8	49.72

Website Traffic Results

Other Sports Clubs

2/2

Domain/Page	Avg. Monthly Visits	Avg. Monthly Unique Visitors	Avg. Visit Duration (min.)	Pages/Visit	Bounce Rate (%)
mlb.com/whitesox/	635,959	284,508	05:34	1.62	44.79
mlb.com/yankees/	3,002,039	897,736	05:04	1.58	51.34
nba.com/blazers/	314,801	199,938	03:07	1.41	64.27
nba.com/bucks/	295,085	214,897	05:45	1.59	48.73
nba.com/bulls/	373,318	273,012	04:47	1.33	59.83
nba.com/cavaliers/	249,244	120,720	03:51	1.53	53.38
nba.com/celtics/	518,897	364,227	04:38	1.46	62.01
nba.com/clippers/	172,908	171,784	02:36	1.47	56.15
nba.com/grizzlies/	122,817	128,836	02:52	1.34	55.94
nba.com/hawks/	103,326	113,262	01:49	1.31	56.2
nba.com/heat/	264,975	225,263	05:02	1.45	66.11
nba.com/hornets/	138,966	110,776	02:12	1.69	55.06
nba.com/jazz/	255,444	166,534	03:54	1.29	69.37
nba.com/kings/	360,107	234,085	05:29	1.37	59.27
nba.com/knicks/	223,573	190,655	03:59	1.46	60.1
nba.com/lakers/	690,470	540,606	06:10	1.71	54.07
nba.com/magic/	289,271	226,544	03:58	1.37	65.83
nba.com/nets/	141,806	153,926	03:47	1.31	49.55
nba.com/nuggets/	294,557	242,347	03:32	1.39	63.57
nba.com/pacers/	180,819	137,238	03:06	1.71	40.33
nba.com/pelicans/	163,271	131,709	03:39	1.38	64.18
nba.com/pistons/	120,031	109,740	05:41	1.5	43.95
nba.com/raptors/	254,098	138,676	09:15	1.6	62.31
nba.com/rockets/	147,033	128,360	04:55	1.44	54.95
nba.com/sixers/	240,888	201,917	06:13	1.39	59.7
nba.com/spurs/	163,513	145,294	04:31	1.43	53.97
nba.com/suns/	190,038	176,716	05:26	1.35	61.86
nba.com/thunder/	120,356	88,746	09:31	1.76	44.33
nba.com/timberwolves/	219,292	190,110	04:16	1.32	66.26
nba.com/warriors/	558,366	432,971	04:16	1.37	63.93
nba.com/wizards/	109,467	116,308	04:22	1.48	54.99
neworleanssaints.com	578,448	392,163	04:51	1.64	69.13
newyorkjets.com	713,556	502,011	06:27	1.78	67.58
nhl.com/bruins/	469,376	376,750	02:53	1.48	49.73
nhl.com/canadiens/	603,590	333,371	04:40	2.44	49.06
nhl.com/kings/	295,080	196,484	03:25	1.53	48.68
nhl.com/mapleleafs/	682,601	331,979	04:50	1.46	52.95
nhl.com/rangers/	291,418	259,646	04:31	1.78	41.97
packers.com	4,527,803	1,121,779	08:56	2.11	45.05
panthers.com	988,785	569,251	05:28	1.77	69.73
patriots.com	1,649,868	788,409	07:06	1.81	64.34
philadelphiaeagles.com	1,845,165	1,116,818	07:28	2.15	66.14
raiders.com	1,052,018	668,689	06:50	1.72	69.96
redbullracing.com	551,508	323,559	04:51	2.13	64.23
seahawks.com	1,120,310	716,298	07:29	2.27	62.51
steelers.com	1,462,741	760,783	06:04	2.14	60.8
tennesseetitans.com	606,134	343,815	10:30	1.86	66.74
therams.com	809,069	372,515	03:32	1.61	61.94
vikings.com	1,681,695	849,691	06:38	1.85	66.44
williamsfl.com	561,483	334,766	05:15	1.47	80.93

Instagram Engagement Results

Football Clubs

Instagram Page	Avg. Monthly Engagement
1.fcunion	273,362
1fsvmainz05	36,539
acfflorentina	2,075,580
acmilan	23,635,877
acmonza	522,448
alhilal	n/a
arsenal	31,432,057
asmonaco	91,395
atalantabc	918,045
athleticclub	328,089
atleticodemadrid	1,060,122
avfcofficial	1,119,112
bayer04fussball	552,186
bolognafc1909	658,172
borussia	387,038
brentfordfc	155,964
burnleyofficial	30,400
bvb09	7,019,723
cadizclubdefutbol	45,461
cagliaricalcio	97,480
caosasuna	63,514
chelseafc	4,925,359
clermontfoot	14,750
cpfc	1,577,147
deportivoalaves	41,514
duhailsc	5,392
eintrachtfrankfurt	685,929
empoli_fc_official	127,583
everton	309,402
fcaugsburg1907	35,188
fcbarcelona	184,718,949
fcbayern	36,571,487
fch_1846	16,622
fckoeln	151,868
fclorient	34,843
fcmetz	n/a
fcnantes	118,566
frosinonecalcio	115,787
genoafc	132,477
getafecf	137,266
gironafc	164,319
granadacf	69,977
hac_foot	11,672
hellasveronafc	219,049
inter	22,037,333
intermiamicf	31,068,648
juventus	22,466,933
liverpoolfc	62,359,857
losclive	107,102
lutontown	191,344

Instagram Page	Avg. Monthly Engagement
manchesterunited	104,365,684
mancity	91,136,667
mhscofficiel	12,141
nufc	837,113
official_sslazio	2,143,474
officialasroma	12,517,373
officialbhafc	720,320
officialnffc	235,006
officialssnapoli	8,540,392
ogcnice	61,533
ol	617,746
olympiquedemarseille	2,196,152
palmeiras	27933,694
psg	62,854,865
rayovallecano	21,938
RBLeipzig	132,019
rccelta	102,706
rcdmallorcaoficial	42,652
rclens	53,171
rcsa	59,276
realbetisbalompie	430,406
realmadrid	215,512,399
realsociedad	239,027
riverplate	2,531,257
sassuocalcio	111,792
scfreiburg	206,119
sevillaafc	702,643
sheffieldunited	95,881
spursofficial	19,665,334
stadebrestois29	37,350
stadedereims	22,760
staderennaisfc	52,031
svdarmstadt1898	12,957
torinofc1906	557,543
toulousefc	178,155
tsghoffenheim	26,143
udalmeria	41,832
udinesecalcio	65,162
udlaspalmasoficial	n/a
urawaredsofficial	100,675
uslecce	346,335
ussalernitana1919official	345,977
valenciacf	98,726
vfb	204,988
vfl.wolfsburg	23,242
vflbochum1848.official	41,554
villarrealcf	81,338
werderbremen	840,646
westham	913,548
wolves	214,221

Instagram Engagement Results

Other Sports Clubs

Instagram Page	Avg. Monthly Engagement
49ers	7,079,201
angels	158,988
astonmartinfl	2,224,583
astros	491,629
atlantafalcons	183,137
athawks	216,534
azcardinals	n/a
bengals	654,508
bluejays	266,850
braves	1,648,459
brewers	28,407
broncos	428,720
brooklynnets	388,663
buccaneers	236,759
bucks	480,865
buffalobills	609,494
canadiensmtl	175,549
cardinals	43,297
cavs	1,923,934
celtics	10,015,666
chargers	257,662
chicagobears	360,251
chicagobulls	505,940
chiefs	4,355,281
cleguardians	16,189
clevelandbrowns	484,092
colts	141,699
commanders	104,197
cubs	148,496
dallascowboys	1,210,415
dallasmavs	1,537,678
dbacks	71,935
detroitlionsnfl	569,513
detroitpistons	137,859
dodgers	889,014
haasf1team	991,799
hornets	131,361
houstonrockets	2,050,417
houstontexans	422,996
jaguars	116,177
kcroyals	21,492
laclippers	653,633
lakers	8,580,562
lakings	117,237
mapleleafs	1,703,790
mariners	102,854
memgrizz	447,276
mercedesamgfl	8,134,532
mets	193,899
miamidolphins	550,905

Instagram Page	Avg. Monthly Engagement
miamiheat	6,210,906
nationals	28,301
nhlbruins	n/a
nuggets	507,248
nygiants	496,612
nyjets	369,694
nyknicks	301,913
nyrangers	2,272,576
okcthunder	1,574,704
orioles	71,213
orlandomagic	203,128
pacers	349,347
packers	320,802
padres	78,322
panthers	99,933
patriots	374,573
pelicansnba	129,949
philadelphiaeagles	1,240,737
phillies	2,144,028
pittsburghpirates	100,500
raiders	901,029
rams	720,217
rangers	n/a
raptors	192,837
ravens	931,062
raysbaseball	34,187
redbullracing	9,579,614
reds	179,854
redsox	91,806
rockies	20,638
sacramentokings	251,368
saints	252,896
seahawks	n/a
sfgiants	142,394
sixers	325,457
spurs	201,165
steelers	5,144,776
suns	603,263
tigers	557,221
timberwolves	336,786
titans	97,801
trailblazers	257,454
twins	37,557
utahjazz	152,860
vikings	229,139
warriors	27,671,962
washwizards	72,159
whitesox	8,437
williamsracing	717,608
yankees	552,283

Next Steps

As we approach 2025, we continue our research journey by analysing innovations and emerging trends in the sports fan engagement market. We also implement and test these advancements within the Virtual Fanzone project.



Get involved and contribute to the research.

Join top industry pioneers from sports, media and the academics to discover the opportunity of a new digital era.

1



Be part of the **Virtual Sports Fan Report**.

2



Test the impact of new technologies with a **virtual Fanzone plug-in**.

3



Get access to **user behaviour data**. Track, test, and learn.

For more information, please contact:



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Luca Scalenghe, Data Scientist

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Participating and Featured Partners



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