

The Future of the Sports Fan



Foreword



Charlie Raincock, director at
Performance Communications

As technology continues to make the world smaller, our lives are getting busier and our wants and needs are multiplying. The speed with which society is changing has never been faster. Generational gaps are growing wider and societies are fragmenting.

Throughout this upheaval, one clear beneficiary is the world of sport. As competition for attention grows, and time-shifting consumption erodes the number of communal moments we share, sport, and the passion it evokes, continues almost uniquely to provide a stream of live and widely-shared moments. Sport is emerging as the most potent unifying force at the core of mankind.

In recognition of this shift, brands are increasing their investment in sport, but without fans what power does sport have? With fanbases becoming ever more diverse and spreading across more channels, leveraging sport's power is becoming more complex.

This evolution presents challenges and opportunities in equal measure. Since its inception, the team at Performance Communications has been single-minded in its goal of developing campaigns that captivate sports fans, working with brands to harness the triggers of fan excitement and enhance the fan experience.

Fundamental to this goal has been a deep understanding of fan behaviour. The impending shifts driving the evolution of sports fans has prompted our collaboration with behavioural insights agency Canvas8 to develop The Future of the Sports Fan.

Looking firmly towards the sporting horizon, this study boldly seeks to provide a toolkit for sports stakeholders to confidently navigate the evolution of fandom. We want to help organisations understand the specific make-up of their sport's fan base – their motivations, the behaviours associated with different levels of connection, and the trends affecting them all.

Both the process and the results have been fascinating. We are confident the report will prove instrumental in helping you prepare for change.

We hope you enjoy reading it.

Introduction

Since the early paleolithic period, sports have been part of human culture. And this has never been truer than today. For billions of people around the world, sport is part of the fabric of their daily life – a unifying force in global culture that lives through the conversations they have, the media they consume and the identities they project.

Few areas of popular culture have the power to affect people as intensely as sport. Over the course of their lives, an estimated 5% of people will switch religions. How many British football fans will switch from one team to another? Closer to 2%.

It's the powerful emotional connection fans have with teams and players that explains why, as a market, sports are worth an estimated \$600-\$700 billion, and growing faster than global GDP. Sport is big business, but it would be nothing without the fans supporting it. We know this because we've spent the last four months working to understand sports fans, mapping out their future to ensure their changing needs are being served.

Working with academics, sports experts, sponsors and fans, we've explored how the world of sports fans is changing. As the impacts of new technologies, a rapidly evolving media landscape, globalisation and demographic changes are being felt around the world, we reveal answers to the pressing questions about their future.

Will virtual reality kill the live experience? What will the rise of female sports fans mean? What happens if China becomes the dominant footballing power? Are e-sports really sports? Will science lead us to new leagues of cyborg athletes?

Fans, and the brands hoping to engage them, are about to enter a new world of sport, which over the next decade may change faster than the previous century. This project aims to provide a definitive vision on the future sports fan, and how to best align with their needs.

The Experts



Dr. Daniel Wann – Sports fan psychologist at Murray State University



Phil Barker – Head of commercial acquisition for the FA



Fran Millar – Director of business communications at Team Sky



Luca Colajanni – Media delegate for Formula E



Roel de Vries – Global head of marketing and brand strategy at Nissan



Daniel Glantz – Global head of sponsorship at AIG

With contributions from:

Jon Wertheim, Executive editor, *Sports Illustrated*
Matt Walters, Media specialist, Decipher Media
Matthew Ball, Media expert, Redef Group
David Collet, Senior director, CNN Commercial
Dr. Charles Yesalis, Author, *The Steroids Game*
Lesla Ukman, Futures director, ESP Properties
Matthew Glendinning, Editor, SportBusiness Group
Paul Gleeson, Creative producer, Sky Betting & Gaming
Leo MacLehose, CEO, MatchPint

Methodology

Stage One: Academic Framework

Working with leading sports fan psychologist Dr. Wann, and researching the scientific literature on sports fandom, we built a model to define and understand sport fans.

Stage Two: Environmental Scanning

We then mapped out areas of change around the sports fan, employing futurology techniques and conducting a review of 300-plus innovations which were then grouped into themes.

Stage Three: Expert Braintrust

In-depth interviews with 14 experts across sports, sponsorship and various specialist areas (e.g. sports media) helped us clarify trends and their likely impact.

Stage Four: Quantifying Trends

We then designed a survey to explore how some of the key themes identified were impacting a representative sample of fans (n = 500, UK) across a range of sports.

Future Fan: The Framework

Who is a sports fan?

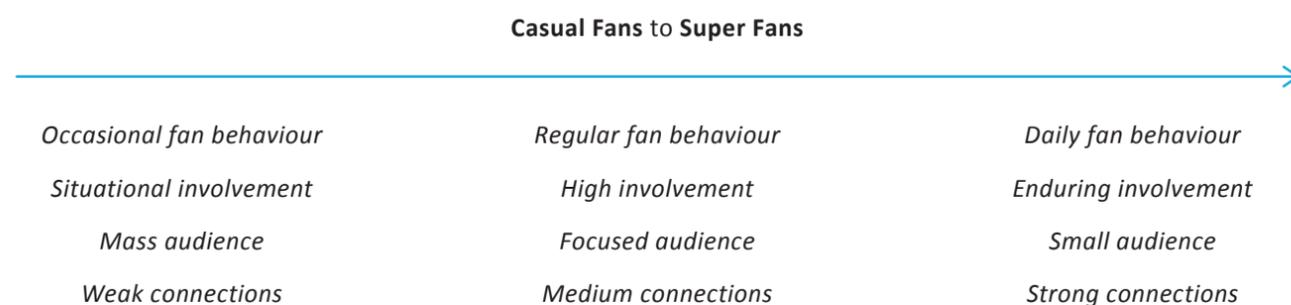
As researchers of human behaviour, we don't forecast the future by letting our minds wander through all the glittering possibilities. Before we start peering into the future, we need to clarify what a fan is. Without understanding this, any attempt to imagine their future will be misguided.

A fan is easy to spot, but it's almost impossible to describe the archetypal fan, because there are many factors at play – different sports, different demographics, different occasions. According to leading sports fan psychologist Dr. Daniel Wann, the most meaningful way to differentiate them is by how much of a fan they are.

For example, 3.2 billion people tuned into the last World Cup, but that doesn't mean 3.2 billion people are football fans. Not all fans are equally passionate; fandom sits on a spectrum from weakly identified to strongly identified. Some are fans every day, others just once a year.

A key difference is that strongly identified fans treat sports as part of their identity – it's who they are. These fans believe they are a part of the team and exhibit a very strong emotional connection, reacting to events that happen to a player or team as if they happened to themselves. They feel good when they win, bad when they lose.

Fig. 1 The fan intensity spectrum



“If you're a sports team or an athlete, you want fans to identify with you because that's where the money is.”

Dr. Daniel Wann, sports fan psychologist

What drives sports fans?

When thinking about the future fan, we need to consider how these shifts impact the ways people identify with sports, teams and athletes. We also need to consider why they engage in fandom.

These underlying drivers of fan behaviour, gleaned from psychology, are stable concepts. As they don't change much over time, we can extrapolate the fan's future with more clarity. So whatever sports fans will be doing in the future, their behaviour will be driven by these deeper motivations.

We analysed several empirical models and, after consultation with Dr. Wann, our research pinpointed eight universal motives present across sports, cultures and demographics: Entertainment, Escape, Eustress, Aesthetic, Learning, Achievement, Connecting and Bonding.

Fig. 2 The eight fan motivations

MOTIVE	EXPLANATION
ENTERTAINMENT	<i>The enjoyment that comes from watching sports as a leisure activity.</i>
ESCAPE	<i>The use of sports as a diversion from everyday stress or boredom.</i>
EUSTRESS	<i>The highs (and lows) fans experience as teams are winning (and losing).</i>
AESTHETIC	<i>The beauty of watching a highly skilled athlete perform.</i>
LEARNING	<i>The fan watching to learn from and be inspired by the participants.</i>
ACHIEVEMENT	<i>The feelings of vicarious achievement fans share when their team wins.</i>
CONNECTING	<i>The sense of belonging fans feel by being connected to a larger group.</i>
BONDING	<i>The use of sports to bond and spend quality time with family.</i>

These motives describe the full range of reasons behind fandom. With boxing, for example, the 'eustress' motive is evident in fans. With gymnastics, the 'aesthetic' motive is more pronounced. With team sports, the 'connecting' motive is greater.

Why do these motivations matter? Consider when 3D televisions launched; tech journalists painted them as the future, pubs installed them, and broadcasters began showing games in 3D. Then what happened? The technology flopped. The point is simple – the future holds many possibilities, but it's how fans respond that matters.

Strongly connected fans are important because they are:

- More likely to attend games, participate, and consume sports media
- Willing to pay more for tickets and spend more on merchandise
- More likely to remain loyal over time

Weakly connected fans are important because they are:

- Potentially larger in terms of audience size
- Most likely there for the social or entertainment factor
- Likely to skim between sporting experiences

Future Fan: The Trends

Eight trends will shape the future of sports fans

Identifying the motivations of sports fans gives us the grounding we need to explore their future. The next step was to understand what's changing around the fans themselves – the context.

To do this, we employed a method well-established in futures research known as environmental scanning – the process of identifying signals of change and grouping them together under themes related to the motivations.

We conducted an extensive review of more than 300 innovations and then ran a series of in-depth interviews with 14 experts across sports, sponsorship and a number of specialist areas (from media to stadia). We then cross-referenced these underlying shifts with our core motivations and grouped them into trends. Following this, we designed a survey to explore how these trends were impacting a representative sample of fans across a range of different sports.

Our research identified eight core trends impacting the future of fans. These are all conceived not from the view of the sponsor or sport, but the fan. This is not about future gazing, but future mapping – providing a framework for those hoping to align with fans in the coming years.

Fig. 3 The eight motivations of sports fans

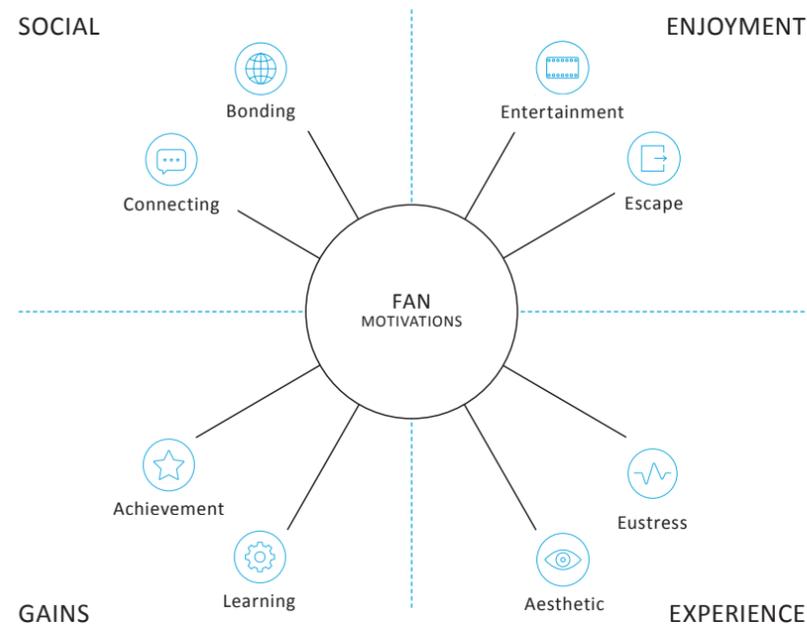


Fig. 4 The eight trends impacting the future of sports fans



1. Everybody's Game

Fanbases will become more diverse and inclusive



2. Post-Passive

Fans will become more active and influential



3. The 24/7 Fan

Fans will enjoy sport anywhere and everywhere



4. Augmented Viewing

Fan media will become personalised and immersive



5. Extra Live

Fans will demand unique venue experiences



6. Priced Out

Being a fan will become a luxury



7. Game Changers

Underserved fans will pioneer new sports



8. Playing With Purpose

Sport will become the biggest platform for positive change



Everybody's Game

Fanbases are diversifying. As sports look beyond traditional demographics, they're becoming more accessible, inclusive and appealing for international fans, women and families.

Now

Sport is one of the most powerful forces in global culture. The last World Cup attracted three billion viewers worldwide, while nearly four billion tuned in throughout the London 2012 Olympic Games. No other cultural property can move across languages and societies.

Yet today's fans are no longer limited to local sports – they can tune into any game around the world. As a result, fanbases are growing globally – from the Premier League in Asia to NFL in Europe. Manchester United boasts 659 million social followers worldwide – one tenth of the world's population. How many of those fans come from Manchester? Fewer than 1%.

Fanbases are not just welcoming international fans, but overlooked fans. Since ancient Greece, sports have been part of the 'masculine domain'. Now, as traditional gender roles are being questioned, and sports organisations realise the economic opportunity of female fans, a change is underway. Women make up 50% of the global population, but only a small minority of fans.

While the main driver behind expanding fanbases is profit, for fans it triggers a shift in the way they identify with sports, teams and athletes. And it raises questions about authenticity and ownership; how far should sports go to attract new fans? And how will existing fans react to a more diverse fanbase?



FIFA 2016 marked the first time women's teams were featured in the game's history (© EA Sports, 2016)

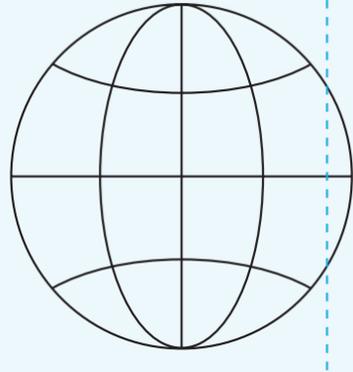


Barcelona fans protested a deal with Qatar for 'incompatible' values (© FC Barcelona, 2015)

Key fan motivations

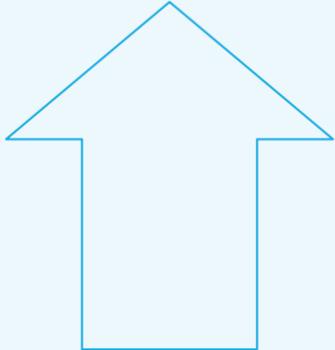


Everybody's Game



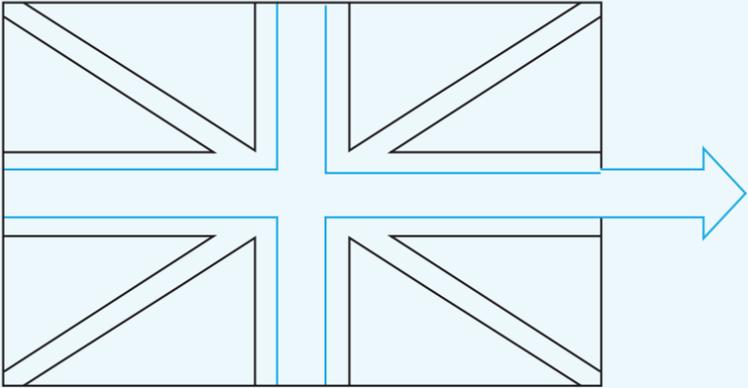
90%

Believe anyone can be a sports fan



85%

Say it's important for sports to grow fanbases



2 in 5

Follow sports outside the UK, with NFL being the most popular



3%
Make sports worse

7%
Weaken communities

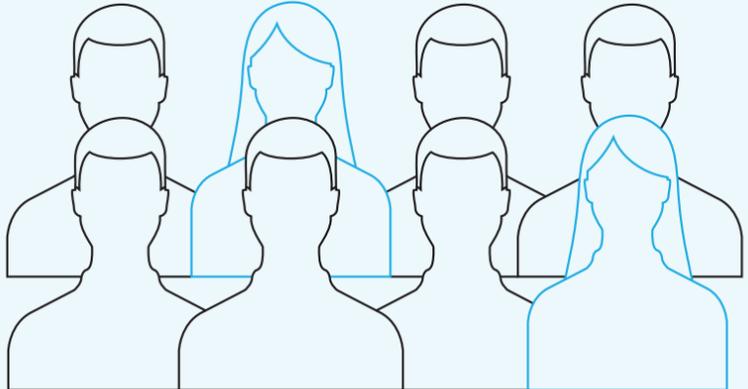


41%
Make sports better

49%
Strengthen communities

90%

Feel positive about diversifying fanbases

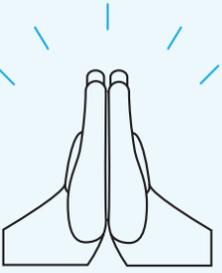


46%

Have noticed female attendance increasing



30%
Religion defines me



57%
Sport defines me

Sport

Defines fans more than their religion

Everybody's Game

Fanbases will become more diverse and inclusive

Future

Female fans become equal to male fans. Female sports have arrived. More Americans watched the Women's World Cup final than the NBA Finals last year, while the UK Government expects media brands to "significantly increase their output of women's sport" beyond the current 7%. The same can be expected for sponsors; 80% of sponsorships deals are for male-only sports. This shift is reflected in wider trends – from the hiring of women in official positions to the introduction of female teams in *FIFA 2016*. Eventually, some sports may see gender integration.

Fans drive demand for more inclusive venues. With fanbases becoming more diverse, sports and stadia will focus on inclusivity. Most stadia have family stands to accommodate children, and they will become increasingly important. At Cardiff City, turnstiles can automatically recognise a child's birthday and give them a reward. Opportunities for sponsors will expand too. P&G claims its Olympics partnership based around motherhood was its most successful campaign ever.

Sports invest more in 'newcomer media' to grow fanbases. To grow fanbases, sports will invest in new ways to build connections. Entertainment – built around star athletes and storytelling – will become the focus.

For example, reality show *The Ultimate Fighter* was largely credited with the turnaround of the UFC. This is about making sport accessible to casual fans. At the 2015 Rugby World Cup, spectators could buy a £10 headset with 'novice commentary' to explain the rules, while song-sheets have been handed to travelling football fans so they can sing along.

Travel based around sport grows. The NFL International Series plans to establish a London-based franchise by 2021, having attracted attendances of over one million. Fans are not geographically bound. Sports tourism is the fastest growing sector in global travel according to the World Travel Organisation, with football alone bringing 800,000 visitors to Britain every year, soon to hit the million milestone. As travel speeds increase and costs decrease, fans will take more weekend breaks and holidays to see sports and deepen the 'escape' motive.

The location of live sport becomes a source of tension. The Premier League's proposal of a '39th game' overseas was rejected in 2008, but has since resurfaced. Regardless of that particular proposal, the timezones and locations of the largest global fanbases are increasingly influencing when and where sports are scheduled. Many fans will find themselves time-shifting their

life to keep up with games, watching at work or staying up until 2am. If a European Super League happens, where will it be played?

Fans unable to travel will create domestic fan zones. FIFA's Fan Fests are already a huge part of the World Cup offering, allowing people to recreate a stadium-like atmosphere in city centres. These fan zones will become more sophisticated and expensive. Meanwhile, online streaming and virtual reality will present big opportunities to expand audiences globally. In 2015, Yahoo streamed the first online-only NFL game to 15 million viewers, a third of whom were non-American.

Fans of the same team or athlete will clash. Our research shows that most fans think diversified fanbases will strengthen communities, but this won't be without tension. A deal with the National Bank of Abu Dhabi, for example, saw Real Madrid remove the Christian cross from its badge in the region, while Barcelona saw fan protests over its deal with Qatar for what some considered were 'incompatible' values. How far will clubs compromise their identity to resonate with new fans?

“From the very beginning, we insisted on supporting the women's teams as well. We can't ignore women and families when it comes to sponsorship.”

Daniel Glantz, global head of sponsorship for AIG

Considerations

What are you doing to help grow the sport, increase understanding and build fanbases?

With fans spread across time zones, how can you adapt your offering according to geography?

Have you considered the impact of the growth of female sports?

What can you do to make your sport more accessible to a wider demographic?



Post-Passive

Fans are no longer passive spectators. They're active, vocal, creative and expressive – sharing content, protesting and having a greater influence on sporting outcomes.

Now

Without fans there would be no professional sport. Yet for too long, the role of the fan has been relegated to passive spectator – they're supposed to watch and do little else. But with more tools to express themselves and get involved in the action, they're now entering an era of active fandom.

Fans have always had an impact on sports. Their presence alone has been proven by psychologists to influence athlete performance. Cheering has a positive effect, while jeering has a negative effect. That's why professional athletes undergo rigorous mental training. Fans are anything but passive; if you need proof, just look at the earthquake caused by supporters of Leicester City at the King Power Stadium in March 2016 after the team won with a last-minute goal.

0.3
MAGNITUDE

Size of the earthquake caused by Leicester City fans

Fans want to extend their influence in different ways – there are ongoing protests over ticket prices, ownership or broadcasting decisions. And the rise of social media means they're becoming far more integrated in the action. They're creating media, sharing opinions, voting on decisions, posting selfies on the jumbotron, and leveraging their collective power to demonstrate and express their passion in new ways.

Key fan motivations

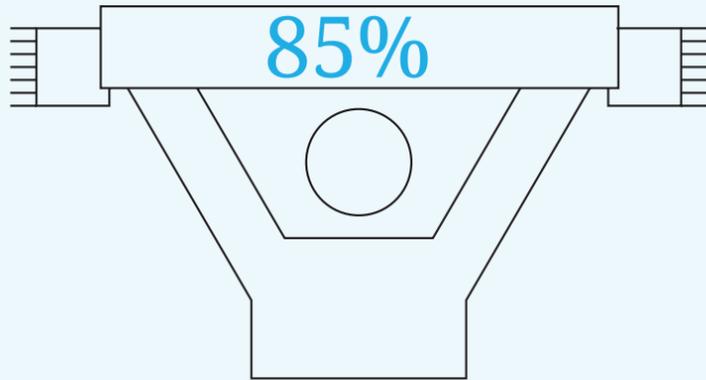


Strava creates new connections between professional athletes and fans (© Strava, 2016)



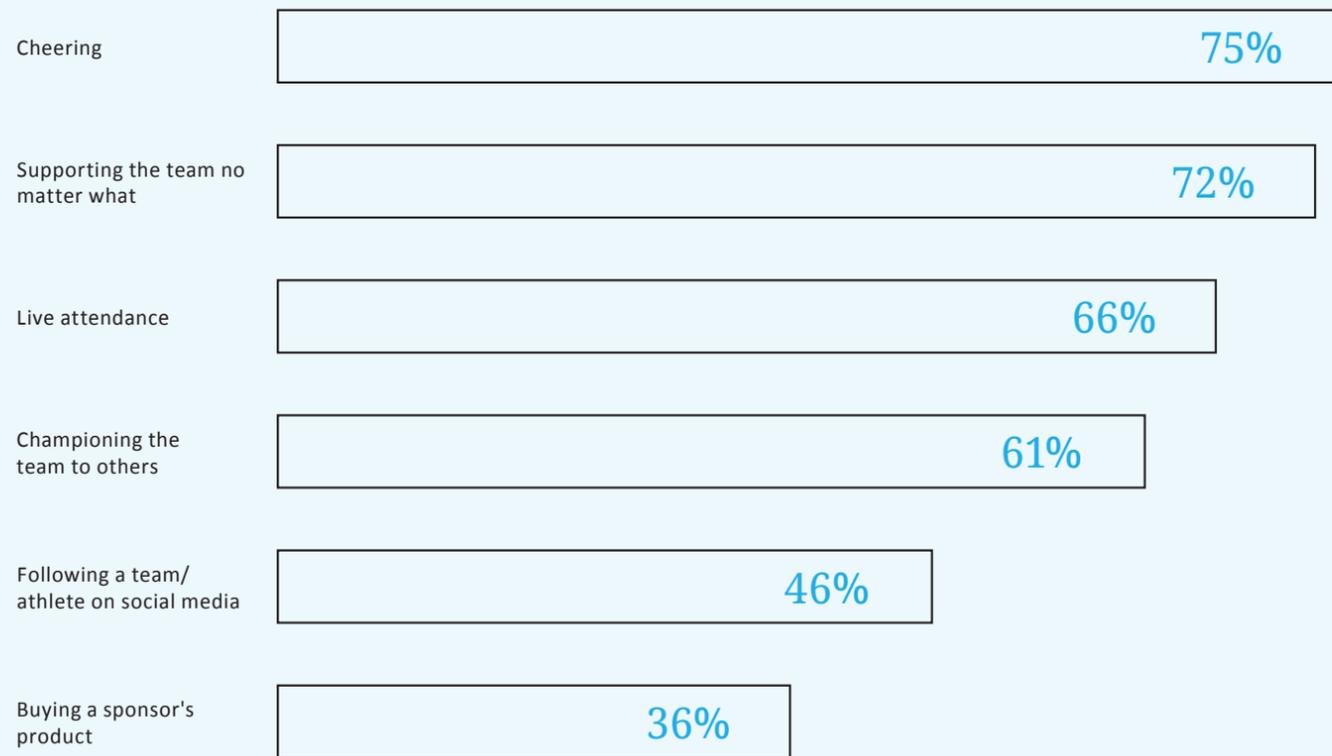
With FanBoost, Formula E puts fans at the centre of the action (© Michelin, 2015)

Post-Passive



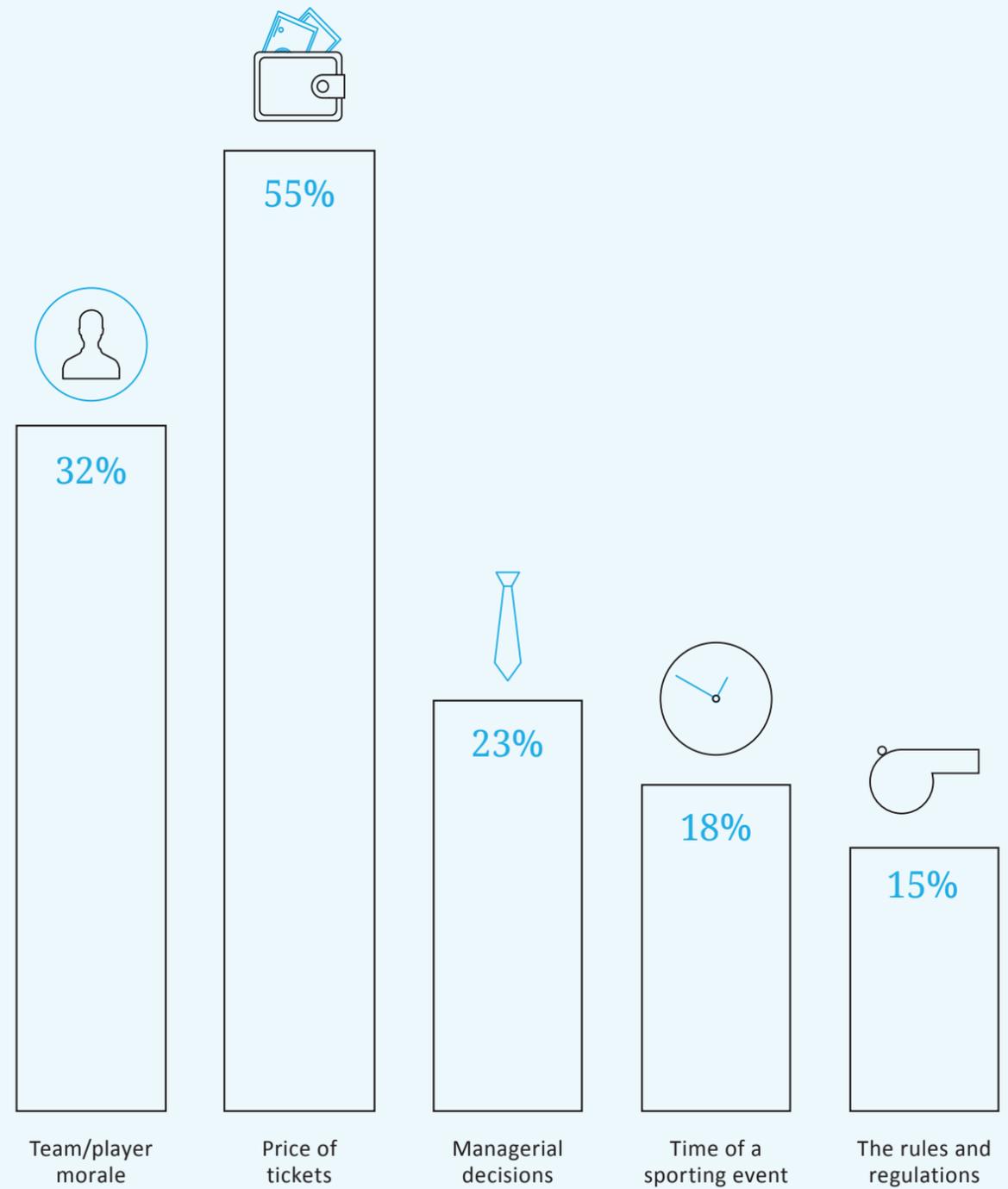
Say sport would be nothing without fans

Being a fan means



% say important to do as a fan

What would fans most like to influence?



Post-Passive

Fans will become more active and influential

Future

Fan media becomes part of the event narrative. Fans continue to share and produce media in huge volumes. The last World Cup was the biggest ever event for Twitter, with 672 million tweets sent. The platform is even creating event-specific emojis. The sheer amount of fan content is driving social media channels to explore ways to filter and surface powerful fan content and make it part of the narrative – exemplified by Twitter Moments and Snapchat Stories.

Fans will be in charge of key decisions. Stockport County famously used Twitter to consult fans about a signing decision. This is just the start; 2017 will see the launch of FANchise, the world's first fan-run professional sports team. Fans can decide on everything from the players to the branding. They can even call the action in real-time. Across sports, loyalty programmes will be re-invented to let fans vote on key decisions; the NHL already collects 35 million fan votes every year. And as fans become more empowered, they will demand greater control. Demonstrations will become more organised, from ousting club owners to protesting misaligned sponsors.

Fans will make their mark on success. Formula E's FanBoost technology, which allows fans to literally boost a driver from their phone, is the cornerstone of the sport's vision for turning fans

into protagonists. And they won't just boost athletes, they'll back them with their hard-earned money. Platforms like MAKEACHAMP are bringing crowdfunding to sports, and have already helped fans and sponsors invest \$2 million in promising athletes in just a few years.

Athletes find themselves competing with fans. Many cycling fans also cycle, and social networks like Strava let them 'compete' with professionals, retracing their routes and seeing how their times compare – 100,000 new members are joining the platform every week. Driven by the 'achievement' motive, fans of participatory sports – sports where fans also play – will find new ways to learn from (and compete with) pro athletes. Motorsport game simulations are becoming so real that drivers are being recruited from video games.

Fantasy sports evolve into real sports. Millions already play fantasy leagues, but the arrival of daily fantasy sports like DraftKings and FanDuel will give fans a new way to express their passion, while earning handsome rewards for getting it right. Real-time, in-play action has revolutionised betting. As these simulations become more sophisticated, they may become a platform to train and recruit future managers.

Stadia will design fans into the action. Fans don't just want to see

their selfies on the big screen or hashtags on a ticker, they want to be part of the action. Digital campaigns like #ownthearch are allowing fans to compete with each other to 'own the stadium'. The newly unveiled Palau Blaugrana basketball arena is designed to intimidate visiting teams with an 'intense' spectator experience, amplifying crowd noise in a way that improves the team's performance. We know cheering positively influences success, but how else will fans influence the outcome?

“In a sport that's participation-led, we can educate fans about how to be better at the sport, or about the equipment.”

Fran Miller, director of business communications at Team Sky



Social networks like Twitter and LINE are helping fans be more expressive through emojis (© LINE, 2016)

Considerations

Could you do more to satisfy fans' desires to become actively involved in your sport?

Are there any ways you might work with rights holders to involve fans in decision-making?

Do fantasy sports offer an opportunity to broaden your dialogue with fan communities?

If fans are participants, how can you help bridge the gap between amateurs and professionals?



The 24/7 Fan

Being a fan used to be part-time behaviour with limited media. Nowadays, smartphones, tablets and 4G mean that being a fan is a 24/7 experience.

Now

Life as a fan used to mean limited opportunities to dig into your passion – a few magazines and the occasional broadcast. But the rapid rise of smartphones means that being a fan is now a 24/7 behaviour.

At the same time, live sports have become almost 'unmissable'. In the world of on-demand viewing and catch-up television, everything can be time-shifted but sport. In genres like drama, around 30% of content is now time-shifted. With sports, it's less than 7%. It's almost entirely watched live. Fans aren't time-shifting, they're place-shifting.

2/3

of ESPN's audience is exclusively mobile

The result is that modern fans are mobile. In 2010, around 18% of searches around big sporting events were from smartphones. In 2014, this figure hit 63%. ESPN is already seeing two-thirds of its audience visit exclusively through mobile. Globally, a third of internet use is now mobile. So it's unsurprising that telcos and internet giants are investing in sports content and delivery.

Being a 24/7 fan is also about extending the experience outside of the live sport when the game, and the season, finishes. How can sports create new opportunities for fans to shift from part-time to full-time – not just throughout the day, but throughout the entire year?

Key fan motivations



A 24/7 newsroom helped adidas connect with fans in real-time (© Adidas, 2015)



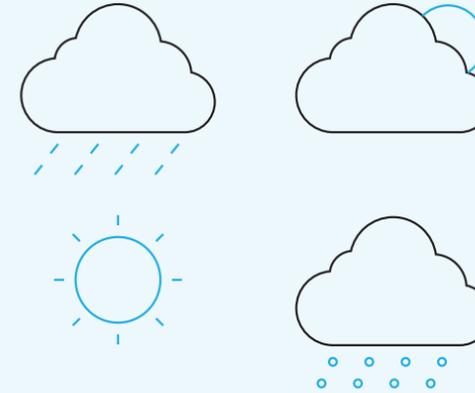
Real-time sports content is becoming available everywhere and anywhere (© Lamar Advertising, 2015)

The 24/7 Fan



73%

Say it's important to access sporting content 'whenever I want'

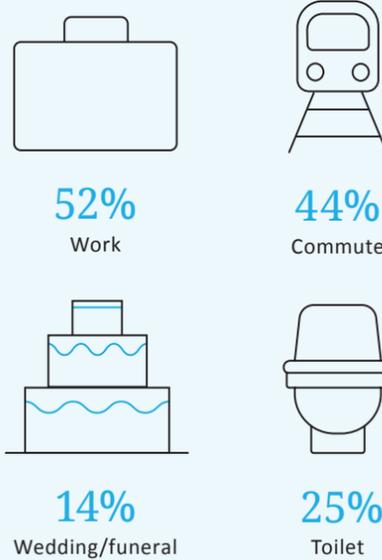


83%

Are interested in out-of-season sporting content

Frequency with which fans are accessing sports content across different platforms

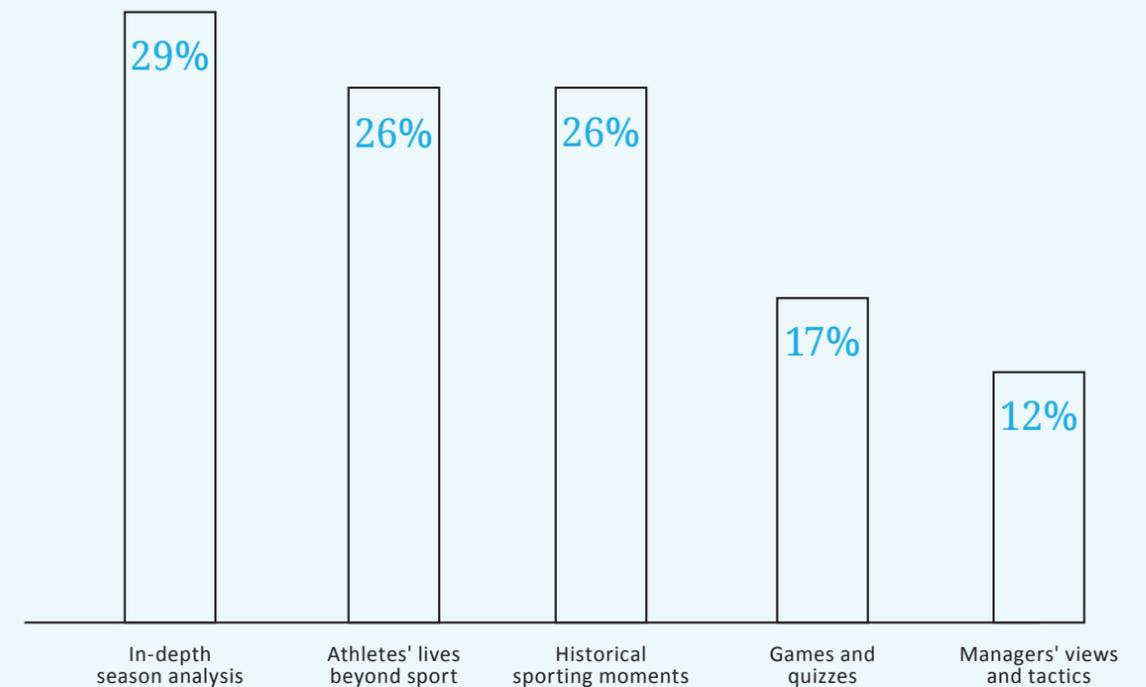
	Daily	Generally
Television	42%	98%
Websites	42%	95%
Social media	34%	81%
Smartphone apps	32%	80%
Newspapers	29%	85%
Radio	24%	83%



Where

fans have accessed sporting content

What fans want to see out-of-season



The 24/7 Fan

Fans will enjoy sport anywhere and everywhere

Future

Live action is central to the fan experience – but it is limited. The 24/7 fan is looking for ways to get their fix during down-time and to follow sports throughout the year, even off-season. Now that social media has established itself in the arsenal of athletes and teams, there is a new need to fill – meaningful content out of season.

“In the future, every club or league could have their own offering that fans subscribe to.”

Matthew Ball, media expert at Redef Group

New events and media extend the life of live sports. The pre- and post-game coverage at sports events will become an increasingly important part of the offering, amping up the ‘eustress’ and ‘entertainment’ elements. For example, the British Olympic Association is considering borrowing from the US model by holding multi-sport trials prior to the 2020 Games to build excitement. Sports like cycling, which are very focused on a few peaks, will consider how they may adapt to create a ‘season-long narrative’. The day before a live event, fan consumption of sport-related videos increases 75%. With this in mind, content to build pre-game anticipation will proliferate.

Mobile media helps fans ‘escape’ any time. ESPN’s research suggests that the rise of cross-media usage among sports fans is not zero sum. In other words, they do not substitute one medium for another, instead adding it together to meet an ‘urgent need to stay connected with sports all day’. Our research backs this up, and reveals how websites and social media are now accessed more frequently than daily newspapers. Innovations in mobile-focused sports content will grow, utilising emojis, live-streaming, short-form videos, highlights, notifications and more. Fans will be consuming sports everywhere – on their commute, at work, even on the toilet – and out-of-home media will provide content like live scores, news and replays.

Internet giants start investing heavily in sports. With the rise in mobile sports consumption, is it any surprise that the Premier League’s rebrand is based around a mobile app icon? In the search for new revenue streams, large internet and telco players will invest more heavily in rights. Vodafone has 4GSport and BT has BT Sport, while Yahoo, Amazon, Snapchat and Facebook are all exploring sports rights. Facebook is expected to eventually live-stream sports through its Live and Stadium services, while Twitter has already won a \$10 million deal to live-stream NFL’s Thursday Night Games.

Some sports, leagues and teams will go direct to fans. While broadcasting rights frameworks are complex, experiments are already underway. In the US, the WWE Network provides unlimited content to a million paying subscribers for \$9.99 per month, while UFC.tv and F1 Access are exploring similar models. This was pioneered by Major League Baseball with MLB.tv, which has been remarkably successful – the app is among the highest grossing in sport. Eventually, athletes, leagues and teams may offer virtual season tickets, and these models will drive investment in more original programming and content.

“Sports fans can consume content on a multitude of devices, inside and outside the home.”

Matt Waters, digital media consultant at Decipher Media



Sport has become ubiquitous with fans watching on their commute and at work (© Leap, 2016)

Considerations

What are you doing to feed fans' incessant appetite for content between live games?

What content can you offer that no one else can?

Are you able to offer behind-the-scenes insights into the team and its players?

Are you able to embrace the quest for ‘live highs’ by adding new live moments between games? (E.g. player interviews, live screening of training, press conferences, etc.)



Augmented Viewing

Fans will be presented with a huge range of ways to consume sports, from multiple camera angles to virtual reality.

Now

Since the advent of television, watching sport at home hasn't evolved much beyond the BBC Red Button. However, with new innovations in media and technology – from bigger screens to virtual reality – fans are finding new opportunities to personalise the experience and reach deeper immersion.

Consider the cycling fan watching the Tour de France. Some 200 riders across nine teams are racing, and the limitations of broadcast mean that every fan has the same view. The most exciting action may be the interplay between the peloton and the breakaway, but what if you only want to follow one rider?

This has never before been possible, but innovations in camera technology and broadcasting mean it's increasingly feasible. This is the new viewing experience fans are exploring. It's a trend driven by two main advancements; firstly, developments in capturing live action (e.g. new camera types or wearables that record player data), and secondly, developments in viewing technologies (e.g. connected televisions, virtual reality and second-screens). The resulting combination is an explosion of new ways for fans to watch the same action.



Drone cameras bring never-before-seen ways of capturing live action to sports (© Lily, 2016)

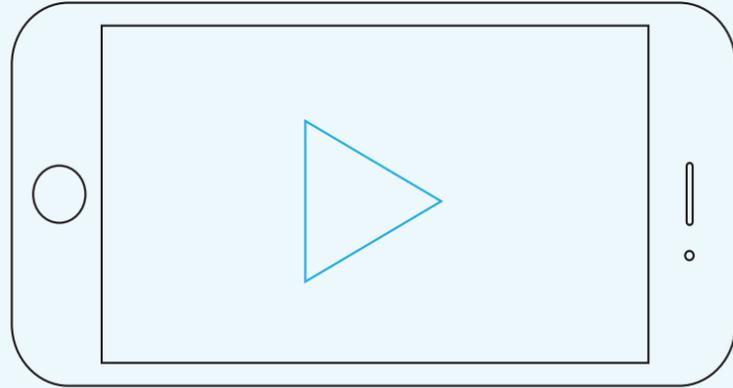


Wearable cameras and VR headsets let fans be an athlete, ref, coach or just part of the crowd (© NextVR, 2016)

Key fan motivations

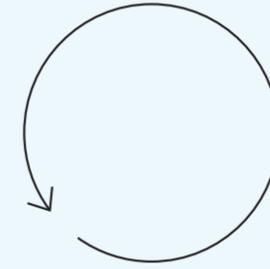


Augmented Viewing



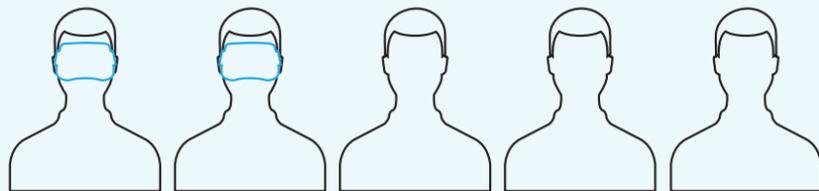
4 in 5

Fans have accessed sports content on their smartphone while watching the TV



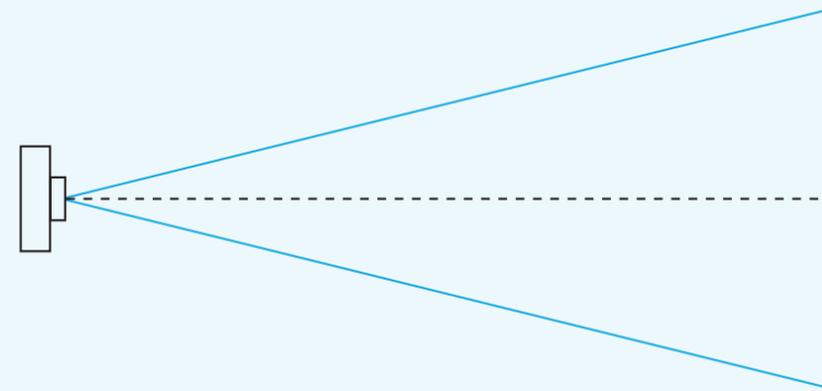
50%

Say interactive slow-motion replays would improve the fan experience



2 in 5

Think virtual reality headsets would improve their viewing experience



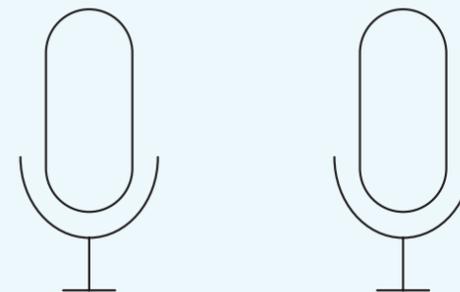
3 in 5

Want to have the ability to choose different camera angles for sports



63%

Say Ultra HD TV screens would improve the fan experience



55%

Think the ability to choose commentary would improve viewing

Augmented Viewing

Fan media will become personalised and immersive

Future

Connected televisions will spur new ways to watch. Samsung's recently piloted Sports Live feature, which lets fans choose which stats they see, and Apple TV's March Madness App, which allows fans to watch two sports on a split screen, both allow people to augment their viewing. Want to see an athlete's heart rate in real-time? Want a replay from a different angle in super slow-mo? Want to watch multiple feeds at once? Televisions will also get larger and sharper. Over half of UK homes now have at least a 33" screen, up 14% from 2008. Within a few years, 65" OLED screens will be commonplace, with Super 8K (16x sharper than HD) set to arrive by 2020. It won't just be visuals though – immersive surround sound will bring stadium noise into the home.

Fans will personalise how they watch sport. This will bring a whole new meaning to the phrase 'are we watching the same game?' My view will be different to your view, causing friendly rivalries to amplify. Fans will be able to choose who they watch with, even if friends and family aren't in the room. Innovations in media meshing will see channels like Facebook (through Stadium) and Snapchat (with its Live Stories) become key parts of the viewing experience.

Media will adapt seamlessly to fans. As emotional and mood recognition technologies – like IMSRV and gesture

interfaces – become part of the television experience, people will unlock new ways to interact with content; wave your hand to check out a replay, shout to show anger, pinch to zoom. Imagine a future where the television can recognise a fan's boredom through facial recognition and inject a sudden change into the game to enliven fans. Imagine ads that lift you after your team loses and pump you up when they're winning.

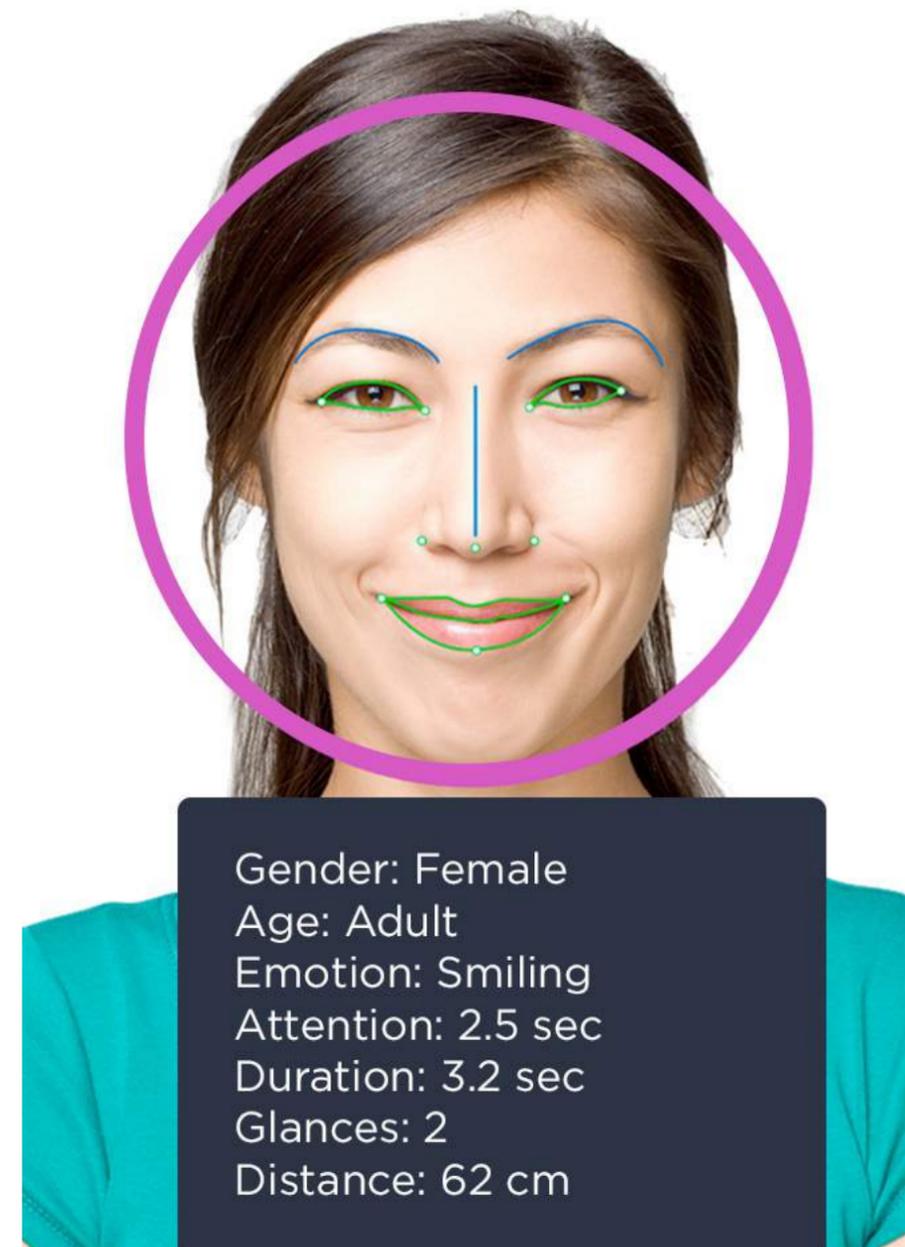
New innovations in how live action is captured proliferate. This starts with camera innovations; cycling is exploring on-bike cameras, rugby has cameras and mics for referees, and drone cameras are being introduced. One drone maker, Lily, uses GPS and visual tracking to follow an athlete, meaning sports like cycling or sailing can gain new audiences. Replays will become interactive – Intel bought a 360-degree replay system to scale what it calls the 'immersive sports' category.

Data tracking will help fans deepen their understanding and connection. Sports like rugby and cycling are already experimenting with microchips in athlete gear to monitor movement, heart rate and fatigue. They're using that data to make the fan experience more entertaining ('datainment') and accessible to newcomers. This data can also be harnessed in exciting new types of media; wearable technology

company Wearable Experiments has developed 'Alert Shirts' which allow fans to experience what athletes feel through their clothing.

Virtual reality will allow people to switch between athlete, referee and fan. With Facebook, Sony, HTC, Samsung, Google and Microsoft all investing heavily in the technology, VR is promising to revolutionise viewing at home; Goldman Sachs expects the VR market to be worth \$80 billion by 2025. Fox Sports is using it for boxing, and the ATP World Tour is revolutionising tennis with LiveLike VR to live stream court-side action to headsets. Meanwhile, Google-backed AltspaceVR is using the tech to help people from different sides of the world watch in synchronicity by creating virtual rooms of up to 75 fans. Fans will be in the director's seat.

Athlete-created media will add a new dimension. Ronaldo has 158 million followers across Facebook, Twitter and Instagram, making him bigger than most brands. And he's always on, allowing fans to check in any time. Adidas is experimenting with WhatsApp Squads, allowing pockets of fans to connect more intimately with athletes, while the launch of The Player's Tribune, a media platform focused on the voices of pro athletes, formalises their power.



In the future, televisions may be able to tweak the content according to your emotions (@ IMRSV, 2016)

Considerations

Are you ready to embrace the potential of new viewing technologies?

How much do you know about how fans watch your sport?

What is the level of fan appetite for innovation within your sport?

Can you work with rights holders and broadcasters to embrace innovation? (E.g. camera tech or virtual reality)



Extra Live

Venues have long struggled to entice fans away from their living rooms. As a result, the fan will demand increasingly unique and memorable experiences to get them off the sofa.

Now

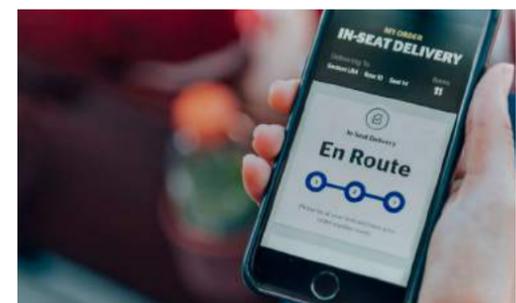
When all the factors are considered, fans prefer to watch the game from the comfort of their home. Studies have shown how, in rugby, a match broadcast on television contributes to a 25% reduction in attendance. And as the at-home viewing experience evolves, it will change fans' expectations about the live venue, raising a simple question: if watching at home is less expensive and getting better all the time, why bother?

There are big investments going into new stadium technologies with a view to driving greater fan revenues. UK arenas are starting to pay attention to the US, where 70% of big teams now have in-stadium Wi-Fi. This new digital infrastructure is facilitating a better experience, from live replays to ordering food to your seat – although fans can still do these things from their couch at home.

Venues will be expected to offer something truly unique. The energy and atmosphere of the crowd is a crucial part of the live experience, and many fans see attendance as an important part of fandom – but how can it all be enhanced?



New stadia are built to be open, with public areas accessible all year round (© HOK, 2016)



Innovations in stadium apps will remove pain points for fans while boosting fan-commerce (© Levi's Stadium, 2016)

Key fan motivations

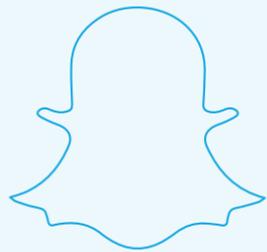


Extra Live

Why do fans attend live sports?

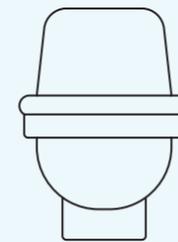
To experience the live game	80%
To show support for the team	75%
To see athletes perform	74%
To socialise	54%
For the pre/post-game entertainment	46%

What proportion of fans are satisfied with the viewing experience?

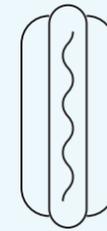


3 in 4

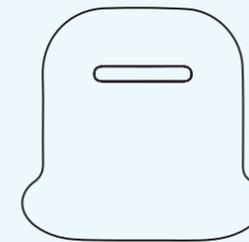
Fans have posted to social media while watching live sports



48%
Stadium facilities

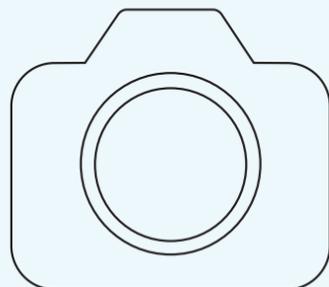


34%
Food & drink



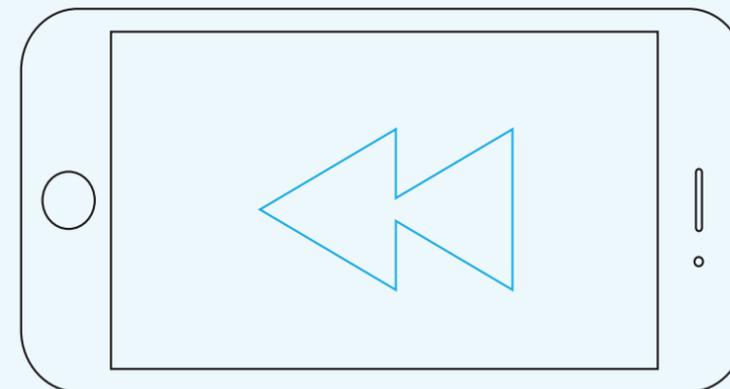
29%
Better seats

How fans think stadia should prioritise investment



2X

Fans are twice as likely to share photos from the stadium than at home



75%

Have watched a replay on their phone at a live venue

Extra Live

Fans will demand unique venue experiences

Future

Focus will shift to contextually-aware apps with special features for attending fans. At the world's most connected arena, the Levi's Stadium in San Francisco, part of the \$1.3 billion investment saw 400 miles of cables laid just for Wi-Fi. During the 2016 Super Bowl, 10 terabytes of data were transferred over the stadium's connection – the equivalent of 6,000 hours of HD video. Most importantly, half of that data was used through the official app as attendees watched replays, ordered food and searched for the shortest bathroom queue.

In-stadium e-commerce will heighten the experience. At the Levi's Stadium, each fan spent an average of \$88 on food and drink through the app during Super Bowl 50. Fan data will help improve and tailor the experience, providing insights to inform planning of stadia, food offerings and pain points for fans. Importantly, these digital services will continually improve and become part of a bigger 'smart city'. Stadia in Tokyo have already proposed driverless taxis to chauffeur fans to and from games.

Stadia will be part of a wider package that fuses sport with entertainment, retail, food service, leisure and tourism. Fans will compete for opportunities to pose questions at press conferences or have lunch with athletes. Stadia will have bars and

suites that allow fans to see a portion of the locker room or player tunnel. One of the most enduring memories of the 2012 Olympic Games was the opening ceremony; when David Cameron saw the plans, he quickly doubled the budget. Fusions between sport and other areas of culture (like the Feast of Rugby) will be increasingly experimental.

Stadia will focus on awe-inspiring experiences. Screens, lights, sounds and tastes – all will be part of a multi-sensory fan experience. Traditionally closed perimeters will expand and open out to engage passersby. At Barcelona's new stadium, a large projection on the underside of the arena's roof will broadcast the event to fans outside, while the concourse will have concessions open to the public 365 days a year. Atletico Madrid has also recently announced plans to install a massive fan zone around its stadium.

Venues will focus on amplifying mass social experiences. Atmosphere and energy are crucial parts of the live experience. Social psychologists have proven that live attendance at a sporting event can boost wellbeing just by being in the company of a crowd who share a common interest. It's why the Tour de Yorkshire – which attracted 1.5 million attendees and was described as 'uniting the county' – was so successful. Some sports are taking this further;

MSL partnered with Tinder on a Swipe Right Night, allowing single fans to meet and potentially find love. Sophisticated fan choreography routines (imagine a 21st century Mexican wave) will become the norm, and live sports, as mass social events, will become increasingly important as ways to break free from our digital lives.

The live experience will be about memory-making. Fans take more photos when they're in the stadium than at home because 'being there' has social currency – especially when history is being written. Consequently, stadia are building staging areas for selfies. Technologies like Fancam are capturing super-high resolution 360-degree pictures so the entire crowd can tag themselves. Snapchat's geo-filters can imprint visuals (like the live score) on to photos, with selfies replacing autographs as mementos. Memorabilia will evolve, harnessing technologies like 3D printing and mass customisation.

“You need to be a lot more entertaining to get the impact.”

Roel de Vries, global head of marketing and brand strategy at Nissan



Sports facilitate connections, that's why MLS's D.C. United partnered with Tinder (@ D.C United, 2015)

Considerations

Do you know fans' level of satisfaction with the live experience?

What exclusives can you offer that will make the journey worthwhile?

Are you tapping into fans' increased use of second screens during live events?

What are you doing to facilitate fans' desires to generate shareable content on the day?



Priced Out

Professional sports are becoming more expensive and elitist. As a result, everyday fans will have to spend more money just to stay connected.

Now

Wealth inequality in Britain has risen for the first time in almost a decade according to the ONS, and this societal imbalance is becoming more apparent in the world of sport. As professional sports become more elitist, money is becoming an unfair advantage. All the while, people are struggling to afford fandom as ticket prices soar.

The global sports industry is estimated to be worth \$700 billion and the market for sporting events in countries such as France, the US and the UK is growing faster than GDP. The Sochi Winter Olympics cost Russia a record \$50 billion, and it's been estimated that Qatar will spend over four times that amount on the 2022 World Cup.

This upward trend, paralleled by increasingly costly sponsorship and rights deals – most notably the record-breaking £120 million per season deal between Barcelona and Nike, or the rise of Premier League broadcasting rights from £3 billion to £5 billion – is causing conflict between fans, organisations and sponsors. Where will the industry draw the line?



Fans are bypassing expensive ticket prices by live-streaming sports directly on Periscope (© Hernán Piñera, 2016)

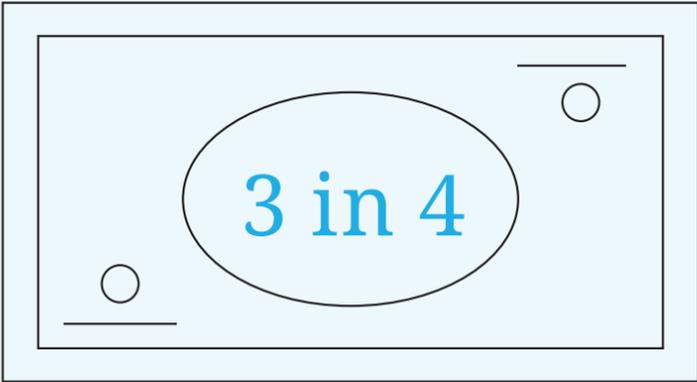


Sports will find ways to reward loyal fans who feel priced out (© City Football Group, 2016)

Key fan motivations

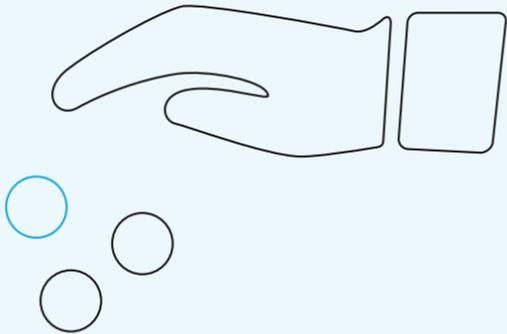
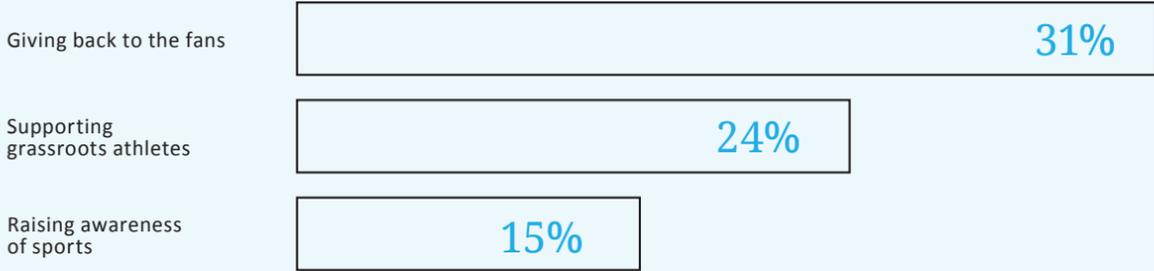


Priced Out

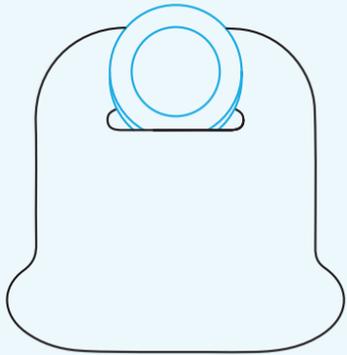


Say they are held back from watching live sports because of ticket prices

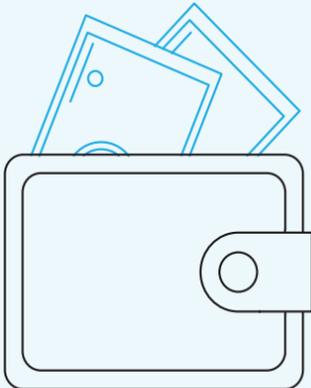
Where can money be better used in sports?



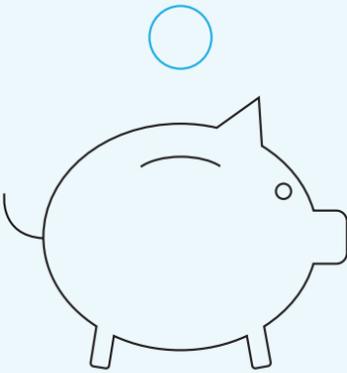
1 in 3
Spend a significant part of their income on being a fan



76%
Say they would attend more live sports if tickets were cheaper



79%
Say tickets to live sports are overpriced



1/2
Think the money for sports should come from sponsors, while just a fifth think it should come from fans

Priced Out

Being a fan will become a luxury

Future

Serious fans will pay more to support teams and athletes. One fan reportedly paid \$65,000 to see Andy Murray at the 2013 Wimbledon final. Rising ticket prices are driving some to boycott games – as with Liverpool FC – prompting David Cameron to urge the Premier League to be fairer. For fans, who see supporting as part of their identity, the only option will be to spend more.

Sports will find new ways to subsidise highly engaged fans. Our research reveals that people want the money in sport to be used to support fans ahead of grassroots athletes. It's unsurprising given that the cheapest tickets for live sporting events have risen at twice the rate of the cost of living since 2011. With normal fans feeling priced out, one emerging idea is to gamify the fan experience, rewarding engagement with anything from free tickets to special experiences.

Ticket prices will become dynamic. The secondary ticket market is expanding – Stubhub now sells 1.2 tickets a second. *Which?* alleges that these sites allow touts to operate 'on an industrial scale' through advanced software, though StubHub responded by saying event organisers need to more closely monitor buyers. The likely consequence will be a shift to dynamic and flexible ticketing systems that differ according to changing variables.

Pay inequality becomes a bigger issue. Floyd Mayweather Jr, the highest earning male athlete of 2015, was paid ten times more than the highest earning female athlete, Maria Sharapova. Clear disparities exist between male and female prize pools, salaries and sponsorship deals. Clubs, teams and athletes will not only become more transparent about their finances, but will also work towards narrowing gender inequalities.

Sport piracy will become the new frontier. Piracy will continue to help fans side-step costs. With the vast majority of sports value coming through live transmissions, protecting broadcasts is becoming a game of cat and mouse. In 2015, 45,000 illegal streams were blocked, but whether watermarks will continue to be effective remains to be seen. An estimated 10,000 fans saw the Mayweather-Pacquiao fight via Periscope for free, dodging the charge to watch it on TV. Fans expect sports consumption to be increasingly flexible; why pay for cable when you only want to watch one sport?

Grassroot athletes look to non-traditional funding. Financially backing sports can be difficult, yet the growth of crowdfunding – now a £24 billion industry – will plug gaps using sites like PledgeSports.org or CrowdCube. In 2014, a Jamaican bobsled team

raised £100,000 in two days to help get to the Sochi Olympics, while the Caterham F1 team raised £2.35 million after going into administration. Brands will also play an important role in supporting grassroots athletes through initiatives like HSBC Hour, which aims to encourage people to get down to their local golf club for a free hour of tuition.

Luxury fans will become more prominent. Luxury fans – those who spend the game in skyboxes and hang out with athletes afterwards – remain an attractive market. Luxury designers Stella McCartney and Pedro Lourenço are already collaborating with Adidas and Nike respectively. How deluxe can the fan experience become?

“People are finding ways to adjust their budgets so that they can go. If the fanbase is highly identified, they'll keep paying whatever it takes.”

Dr. Daniel Wann, sports fan psychologist

“In terms of sponsors influencing the price of sports, we flipped it and identified ways we can add value to the experience.”

Daniel Glantz, global head of sponsorship at AIG

Considerations

Are rising costs affecting the fan experience for your sport? How many are priced out?

Is there room for negotiation with rights holders on where the proceeds of your sponsorship go? (I.e. towards making attending the game more affordable)

Would you consider subsidising the fan experience – through match tickets or merchandise – as a reward for highly engaged fans?

How can you make the sport more accessible to all? Can you improve the quality of the remote experience? (E.g. at home, in pubs or in fan parks)



Game Changers

E-sports? Extreme frisbee? Space diving? Niche sports are popping up faster than ever, with their own specific cultures and rules, often facilitated by online connectivity.

Now

The average Olympic spectator is over 50 and getting older, which is why 2016 will see the IOC pitch the Games to a new generation of fans. Sports are changing to appeal to younger audiences – more fun, more compact, more excitement – whether that's through the Big Bash League in cricket, Power Snooker or Powerplay Golf. Even the X-Games – now in its 25th year – might be considered 'old'.

But the next generation is being exposed to new sporting cultures, attitudes and lifestyles. They're watching Felix Baumgartner free-fall, marvelling at motorcycle surfing, or are glued to Twitch catching the latest e-sports tournament. They're bending the rules and ignoring tradition. For those born in the digital age, the internet has broadened their opportunity to explore niche sports. Today, any kid with a camera can popularise a new hobby – just look at the rise of e-sports, ultimate frisbee and real-life Quidditch.

And as tech becomes a dominant part of the fabric of modern fandom, big questions will be raised about how far the rules of sport can be twisted to keep up with the changing world. What happens when athletes become cyborgs? Or if gene-doping becomes widespread? Formula E has placed innovation at the heart of its proposition, but how will other sports adapt in the face of these game-changers?



Roborace is the world's first driverless race – but are sports still sports without people? (© Roborace, 2016)

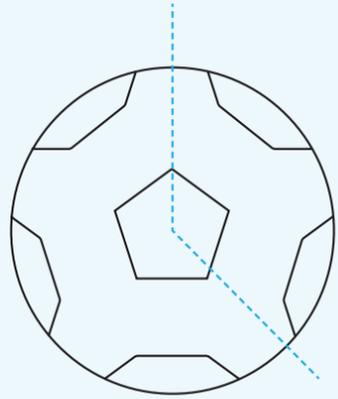


At Cybathlon, augmented athletes are pushing the boundaries (© Cybathlon, 2016)

Key fan motivations

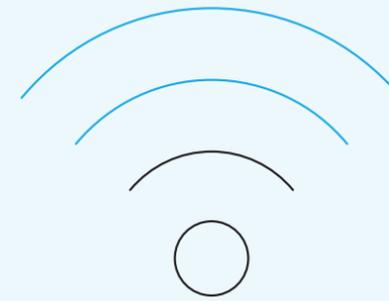


Game Changers



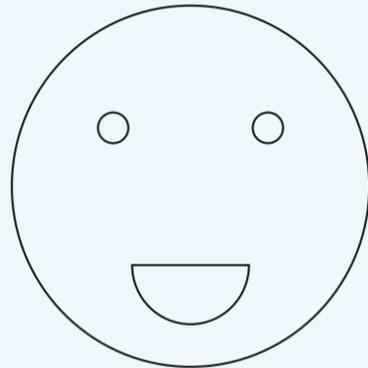
1/3

Think football will no longer be the dominant sport in ten years' time



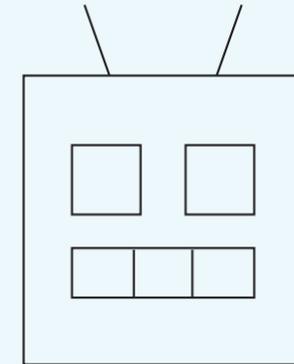
2/3

Say sports should change the rules to keep up with changes in society (e.g. new technology)



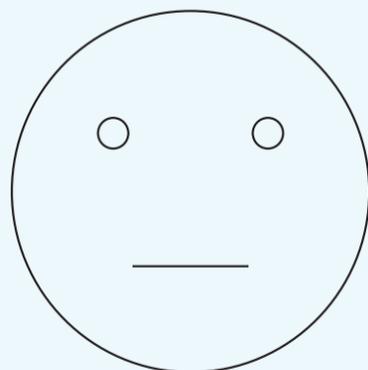
46%

Are excited about new sports and 1/3 follow non-mainstream sports



2x

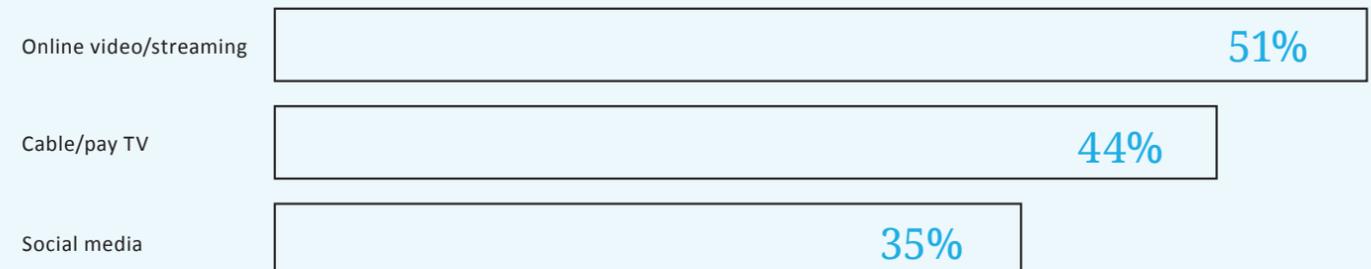
As many fans say technology will make athletes more equal (not less equal)



22%

Say they're bored with traditional sports

How do fans follow non-mainstream sports?



Game Changers

Underserved fans will pioneer new sports

Future

New sporting cultures flourish online, amassing billions of views. At the centre of this trend is the media brand Whistle Sports. In just a few years, it's grown an audience of 170 million, mainly driven by a new class of 'sports creators' on YouTube with their own rule-bending attitudes. Eventually, these influencers will become the new mainstream, fuelling a shift towards less formalised, more youth-driven sports coverage. At the same time, digital connectivity will allow niche sports and sporting sub-cultures to flourish. Around 100,000 people are already playing Quidditch. Sports mash-ups will splice and modify existing ones, creating new and exciting offshoots.

E-sports could become the biggest sport in the world. In 2013, there were 74 million e-sports fans around the world – a figure which had grown 65% by 2015. In the same year, people spent 1.5 billion hours watching Activision games being played, compared to the NFL's seven billion. Sky Sports has already broadcast the FIFA Interactive World Cup, Amazon paid \$1 billion for games streaming site Twitch, and Rio will be hosting the eGames. If we accept that participation is an important driver of fandom – an estimated 260 million people play football, while 1.2 billion play computer games – some futurists believe e-sports could become the world's most popular pastime.

Traditional sports will get shorter and more entertaining to stay relevant. Facing declining youth attendance, traditional sports will be forced to adapt. No event will last longer than three hours and, in a bid to boost the entertainment value, sports will adapt the rules. This will cause tension with the old guard. Football only recently embraced goal-line technology, and won't decide whether referees will be allowed to watch replays in-game until 2018. By contrast, new sports like Formula E have no heritage, allowing them to freely explore new concepts like autonomous racing.

Match and athlete analytics won't replace managers. The use of stats and predictive modelling to make decisions is continuing to grow, giving big teams a competitive advantage. Athlete tracking technologies are helping to fine-tune performance, while smart drugs, like the thermometer pill which tracks core temperatures, bring this data into the body. This will cause issues to arise over privacy and control, though counter-arguments will revolve around how these powerful systems produce valuable new insights from the collated athlete data. For fans, this data will become a central part of the sport, giving them deeper access to players and teams.

Doping becomes more sophisticated and fans become disillusioned. Doping

has always been an issue in sports, but it's been getting more media attention. Scientists are stressing that gene-doping tech is developing rapidly and could present a significant threat to legitimacy. And it's not just athletes that are cheating; a new category of cognitive drugs called nootropics are also being used by managers. Yet the inability of sporting bodies to stem the tide of doping (even with biological passports), coupled with the blurring lines between recovery and enhancement, may eventually see bans lifted and new leagues emerge for enhanced athletes.

Enhanced athletes forge the new frontier of competition. Nearly every Olympic sport has seen the rate of records broken slow down, raising questions about human performance peaking. 2016 will see the first ever Cybathlon in Switzerland, a sporting event that permits bionics, prostheses, brain-computer interfaces and exoskeletons – a kind of Olympics for cyborgs. A runner with artificial limbs can already outrun an able-bodied athlete, and wearables are blurring the line between athlete and cyborg. As the floodgates of augmentation open, this will eventually be a new frontier of competition.



Sports mash-ups will appeal to a new generation of fans (© DC Shoes, 2016)

Considerations

How can you make sure your sport and sponsorship continues to meet the changing needs and behaviour of fans?

As a sponsor, is there an opportunity to work with rights holders to pioneer innovation in a 'traditional' sport?

Could a niche or non-traditional sport help you promote a specific part of your business?

Does the evolution of a new sport provide a suitable sponsorship opportunity for your brand?



Playing With Purpose

After clearing up their image, sports will become powerful platforms for change, providing global stages for positive inspiration for fans and the rest of society.

Now

With such huge reach, sports provide some of the most powerful platforms to inspire positive change in the world. Research shows that fans not only see athletes as role models in sport, but in life generally, and they consider personality to be more important than skill.

But with news stories revealing some uncomfortable truths about the industry, the sporting world will need to clean up its act first. Athletes and teams are always in the public eye, and with scandals emerging daily – from FIFA’s corruption to Maria Sharapova’s drug ban – the industry is falling short on portraying positive role models for fans. Athlete safety in sports like boxing remain an ongoing area of concern.

Sports are making a stand against discrimination, but racism remains an issue. And though NHL teams have used Pride Tape to support the LGBT community, and fans have welcomed sports stars who've come out, these positive events are still few and far between.

Sports have made headway in harnessing their positive power. The One World Play project aims to connect kids through sport to rebuild communities, and while the Olympics has roots in promoting peace and hope, it now wants to assume a leading role in environmental protection. Will sports provide the positive inspiration the world needs?



Purpose-driven brand stories are treating athletes as role models (© Under Armour, 2015)



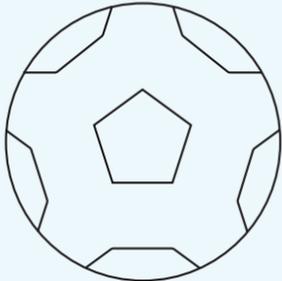
Athlete safety concerns will see sports evolve to be 'guilt-free' (© Reebok, 2015)

Key fan motivations



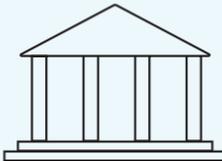
Playing With Purpose

How likely are the following to inspire positive change?



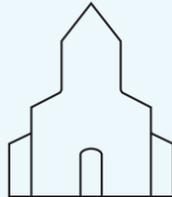
64%

Sports



39%

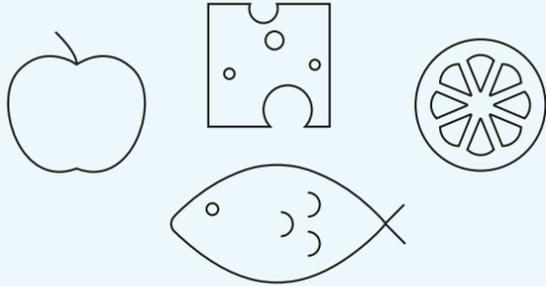
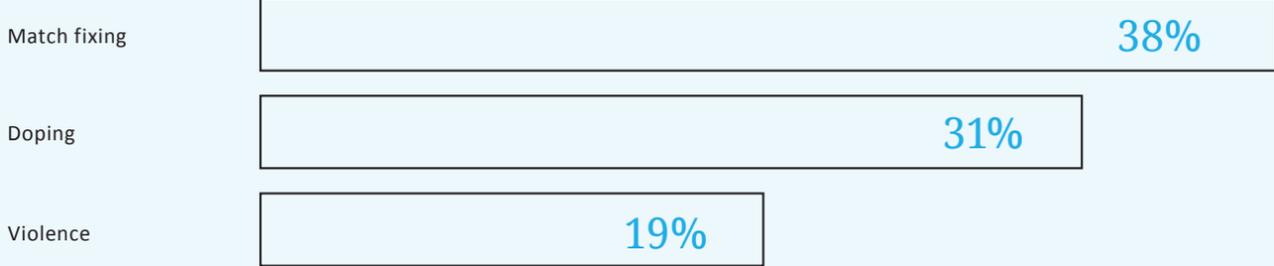
Politics



28%

Religion

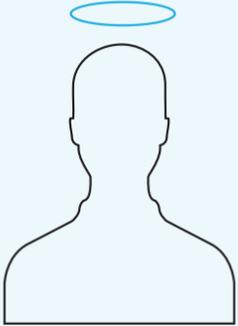
What's the biggest threat to the legitimacy of sports?



33%

Say it's important for sports to encourage a healthy lifestyle

What's important for sports teams to do?



66%

Think athletes are role models in society

Playing With Purpose

Sports provide the biggest platform for positive change

Future

Sponsors and sports increasingly align values. As social responsibility becomes increasingly important for businesses, there will be greater emphasis on shared values. For example, sponsors like McDonald's and Budweiser called for Sepp Blatter to resign during FIFA's corruption scandal.

“We try to look for the activations where we can make our environmental statement. I think this is only going to get bigger.”

Roel de Vries, global head of marketing and brand strategy at Nissan

Athletes rise above politics to inspire fans from all walks of life. It's been nearly 25 years since basketball player Charles Barkley famously said: “I am not a role model.” We know this isn't the case; research has shown how young people treat sports stars as role models, and this has never been truer than in the age of social media. Campaigns like Guinness' #madeofmore illustrate the personal struggles of athletes like Gareth Thomas and Ashwin Willemse, positioning them as icons to look up to.

Concern for athlete health grows. For fans, this will become a growing area of concern, causing them to question their role as supporters. We know eustress is a major part of the sporting experience and this typically heightens in contact sports. But as long-term health effects become apparent, safeguarding athletes will become paramount. This may contribute to a declining talent pool in aggressive sports as parents avoid exposing their children to any risk.

Sports will tackle burgeoning health crises. With a third of Brits expected to be obese by 2030, movements like EuroFIT and SkyRide will harness people's enjoyment of sport to help them follow a healthier lifestyle. Unhealthy foods will be complemented by more wholesome, fresher alternatives. Sponsors will follow similar trends; Coca-Cola's ParkLives initiative, which provides free outdoor activities, plans to get one million people active.

Sports will take leadership on discrimination. Sports provide some of the most important platforms for tackling racism, ageism or sexism. Nelson Mandela famously said that sport “has the power to unite people in a way that little else does”. The Paralympics has been striving to change perceptions of people living with disabilities, and Nike released the #BETRUE collection to celebrate LGBT values. In the future, sports and

sponsors will strive together in the pursuit of inclusion.

Venues and stadia become more focused on sustainability. With global temperatures rising, the future of the Winter Olympics looks bleak. But a response is well underway – whether that's Rio's nine-point environmental action plan for the Olympics, NHL Green's saving water campaign, or Formula E's agenda of promoting renewable energy.

“An important part of Formula E is helping the adoption of electric cars.”

Luca Colajanni, media delegate for Formula E



Nissan made history at Le Mans by completing the first ever all-electric lap (© Nissan, 2014)

Considerations

Can you use your sponsorship to tackle societal issues like discrimination or health?

Are there ways you can leverage the power of the athletes to tackle issues?

Are there opportunities for sponsors and rights holders to work together on specific areas?

Can you integrate your sponsorship into your CSR plans?

The Future Of Motorsport



Luca Colajanni, media delegate for Formula E

With previous generations of sports fans, if you were watching you were watching. Full stop. There were no distractions from tablets, smartphones or social media. Today, young people's attention is stretched. They have more choice, and they are more easily bored. They don't want to spend time watching a show that lasts more than two hours. That's a matter of fact.

This is something Formula One will have to address; the format is too long, the fanbase is ageing, and it's become prohibitively expensive for a new generation. If you want to attend an event, you need to buy a three-day ticket and spend over €200. We need to focus on entertaining fans, to put on a great show without any dead moments. This is what we are doing with Formula E – it's shorter and more entertaining.

The future will be about making sports fans part of the show, in the venue and at home. Even if a fan is sitting on the sofa, they still want to feel they can have an impact, to become part of the process. This is where FanBoost came from. The idea is controversial and difficult to accept, but we need to learn from the success of the reality talent shows and make fans the protagonists.

As a new sport, Formula E has a great opportunity to build its own future, because we have no history. Usually this is not a great advantage, but in our case, it is. Tradition is not built into our DNA, meaning we can imagine new things. A concept like FanBoost could never have existed in a championship with even a ten year history. Formula E could do it because there was nothing stopping it – we have no roots to hold us down.

What else can we do around making the fan the protagonist? In Mexico City, for example, we had high-level simulators. We held a competition for fans attending the event, and the winner was able to compete against the real drivers in the simulation. What's better than racing with your favourite driver? Another exciting innovation we are exploring is Roborace, an experiment with autonomous racing. This is the first time anyone will have seen an autonomous race.

“The future will be about making sports fans part of the show.”

The Future Of Football



Phil Barker, head of commercial acquisition for the FA

Football is on this amazing upward trend. We're seeing massive growth of women's football, while brands and clubs are setting up academies to grow fanbases all around the world. One of the major things we're exploring is fans globally.

There are only so many people you can fit in a stadium, so you want to give those fans on the other side of the world a similar experience and make it as rich and compelling as possible outside of the typical TV screen. Clubs are exploring technology partnerships with the likes of SAP to engage international fans and bring the experience from, say the Etihad Stadium, to a fan 6,000 miles away. That's where virtual reality could become important – to be able to feel part of that experience wherever you are – although it depends on how broadcast rights evolve. It might be that you'll pay for a sporting subscription via VR, for instance.

In the longer term, we're starting to see a shift of power towards China, and that shift could be very quick. We've already seen the likes of LeEco buying up rights. We could see new tournaments that play on a global scale; teams are already doing tours, franchises are being discussed. Could clubs put a second team in the Super League? Could more clubs reflect the City Football Group's model?

A big question is how can we schedule games for the whole world? Live sports are unlike anything else because you can't fast-forward or play catch-up. The Champions League has an issue with this – its games are on in the evening, when Asia is asleep. That's why a lot of Premier League games are on around lunchtime. The whole world can tune in. And in markets like Asia, fans are more likely to switch allegiances when teams lose, so clubs have to find ways to maintain their support through the highs and lows.

Fans want to know a player and team inside out so that when they're down the pub after work, they can back up their opinion. Gone are the days you could just have a conversation about a player. Now, you need to back it up with facts and data. And with social media, if a player makes a mistake, it comes alive and becomes the most talked-about issue. Every fan now has this ability to become a content developer – that's something brands are starting to tune into. Sponsorships will continue to become more sophisticated; it's not just about being the brand on the backdrop or shirt anymore.

“We’re starting to see a shift of power towards China, and that shift could be very quick.”

The Future Of Cycling



Fran Miller, director of business communications at Team Sky

Cycling has become massively popular. Ten years ago, people wouldn't have known the names of cyclists who were competing in the Tour de France, but now the audience has grown exponentially and they're far more educated.

The sport itself is unlike any other. You can't really go and pay homage to a team because there's no stadium unless you're a track cycling fan, but even then there's limited opportunity. From an at-home viewing experience point of view, I can imagine a future that incorporates better use of real-time data and different camera angles so you'll be able to jump between what route or rider you want to follow.

As we don't spend a lot of money on content creation, we hope that by winning bike races we can keep our fans engaged. Success attracts interest and Olympic success can really inspire the nation. With Chris Hoy, Victoria Pendleton and Bradley Wiggins consistently performing for over a decade, people can really get behind them. That's how we can attract new fans.

The massive benefit of being in a sport that's participation-led is that you have a completely credible and unique way to speak to fans. We can educate fans about how to get better at the sport, or about the equipment. For us, the opportunity for future growth lies around a digital platform that enables fans to improve their cycling through their relationship with a professional team. I'd like to think that Team Sky will be able to lead something like that.

There's a lot of work to be done to make the sport more accessible to standard fans. People believe there's cheating going on. We need to prove how we don't compromise on competitive advantage and help fans understand the performances they're seeing are believable. We've only really scratched the surface in the UK and although we've demonstrated how to build a phenomenal fanbase, we can broaden outside of Europe.

“The future will be a digital platform that lets fans improve their cycling through a relationship with a professional.”

View From Nissan



Roel de Vries, global head of marketing and brand strategy at Nissan

"From the beginning of our sponsorship strategy, we established that we wanted to make the fan experience better. We don't want to use the properties for generic advertising.

Then, of course, we looked at how we link it to our brand. With the Champions League, our focus was on 'engineering excitement'. That's what a footballer does on the field and that's what we do with cars. In Europe, you will see we always create a dynamic with famous football players together with our cars. If we're testing vehicles for braking, we'll link it to footballers stopping the ball, for example.

The shift towards greater inclusivity – more families, more women, more children – is absolutely true. Activations around big sponsorships have increased dramatically, and this is partly because more families, women and children are coming, but also because the expectation of the event is getting bigger.

With the live experience, fan parks at the World Cup or the Olympics are also getting bigger. In the past, we would have done a vehicle display – a big screen, two cars and a couple of promoters – and that was it. Now, we have something interactive and fun for fans to do. At the Olympics, we'll have fans doing challenges against our vehicle. You need to be a lot more entertaining to get the impact.

We'll also try to look for those activations where we can make our environmental statement. So we had the first zero emission lap on Le Mans and last year we had an electric car taking the Champions League trophy to the stadium – and because it was electric, it could drive inside.

One thing we are looking at is creating an ongoing link with sponsorships in the digital world. A big part of our investment has been getting things like Player of the Day and Goal of the Week activated online to engage fans on an ongoing basis. With racing, for example, a lot of our activation has not been on the track, but online with the GT Academy. You can get 100,000 people racing your car on Sony PlayStation for a few hours a day. This has far greater reach.

My general view on fan engagement is that we're still in the early days and it's only going to get harder to engage people meaningfully. One reason I'm a big fan of sports sponsorships is because it's an area where people engage in the moment, and as a brand you need to add something to that live experience. Don't go in and just bring your logo. One of the richest things you can do is to make the experience better."

“One thing we are looking at is creating an ongoing link with sponsorships in the digital world.”

View from AIG



Daniel Glantz, global head of sponsorship at AIG

“As a global organisation, sponsorship is an incredible platform to build communications externally and internally. Given our stakeholders – close to 90 million – employees, brokers, customers, clients, and the investor community, sponsorship helps us engage with all of them.”

We like to be recognised as innovative, so being ‘first’ is something we look at when assessing properties. We don’t just want to copy and paste. With the New Zealand rugby sponsorship, for example, it was critical from the start that we didn’t just sponsor the All Blacks. We insisted on supporting the women’s teams as well. With the Dublin GAA, we were the first sponsor to ever use female players in the TV commercials in Ireland.

Being inclusive and supporting women is important for internal purposes too. We were extremely attracted to this element when we assessed rugby. While female spectatorship is moving up with the NFL, rugby is much closer to 50/50.

We were an early adopter of VR and fortunate to be able to work with a broadcast partner. However, as trends start to pick up and rights holders and broadcast partners take notice, rights may start getting locked in, potentially making VR more challenging.

Fans being priced out is a big issue in the US, especially as there’s more competition in terms of how people spend their income. For sponsors influencing the issue, I would flip it. We’ve identified ways to add value to the experience. We’ve paid for the streaming of rugby games globally without restrictions, and offered discounts to tickets for employees.

As a sponsor, we want to see attendance numbers go up because we benefit. We’ve seen huge growth of broadcast penetration for New Zealand rugby – the US just launched its first rugby digital channel. We’ve been recognised as B2B sponsor of the year and a lot of that had to do with the fact that we’ve been supporting the game at grassroots.

The trend towards fans influencing outcomes could be a game changer for sponsorship. Areas like fan voting can enable them to have a closer connection with your brand. We’ve done competitions on social channels and it gives people a different perception about what AIG is about and humanises a difficult-to-explain organisation.

With some of these new smaller properties, I see an opportunity for perhaps more product-based sponsorship. E-sports, for instance, could perhaps be a great platform for AIG to promote cyber insurance.”

“The trend towards fans influencing outcomes could be a game changer for sponsorship.”

Key Considerations

Everybody's Game

Fanbases become more diverse and inclusive

- *What are you doing to help grow the sport, increase understanding and build fanbases?*
- *With fans spread across time zones, how can you adapt your offering according to geography?*
- *Have you fully considered the impact of the growth of female sports?*
- *What can you do to make your sport more accessible?*

Post-Passive

Fans become more active and influential

- *Could you do more to satisfy fans' desires to become actively involved in your sport?*
- *Are there any ways you might work with rights holders to involve fans in decision-making?*
- *Do fantasy sports offer an opportunity to broaden your dialogue with fan communities?*
- *If fans are participants, how can you help bridge the gap between amateurs and professionals?*

The 24/7 Fan

Fans will enjoy sport anywhere and everywhere

- *What are you doing to feed fans' incessant appetite for content between live games?*
- *What content can you offer that no one else can?*
- *Are you able to offer behind-the-scenes insights into the team and its players?*

- *Are you able to embrace the quest for 'live highs' by adding new live moments between games?*

Augmented Viewing

Fan media will become personalised and immersive

- *Are you ready to embrace the potential of new viewing technologies?*
- *How much do you know about how fans currently watch your sport?*
- *What is the level of fan appetite for innovation within your sport?*
- *Can you work with rights holders and broadcasters to embrace innovation? (E.g. camera tech or virtual reality)*

Extra Live

Fans will demand unique venue experiences

- *Do you know fans' level of satisfaction with the live experience?*
- *What exclusives can you offer that will make the journey worthwhile?*
- *Are you tapping into fans' increased use of second screens during live events?*
- *What are you doing to facilitate fans' desires to generate shareable content on the day?*

Priced Out

Being a fan will become a luxury

- *Are rising costs affecting the fan experience for your sport?*
- *Is there room for negotiation with rights holders on where the proceeds of your sponsorship go?*
- *Would you consider subsidising*

the fan experience as a reward for highly engaged fans?

- *How can you make the sport more accessible to all? Can you improve the remote experience?*

Game Changers

Underserved fans will pioneer new sports

- *How can you make sure your sport and sponsorship continues to meet the changing needs and behaviours of fans?*
- *Does the evolution of new sports provide a suitable sponsorship opportunity for your brand?*
- *Could a niche or non-traditional sport help you promote a specific part of your business?*
- *As a sponsor, is there an opportunity to work with rights holders to pioneer innovation in a 'traditional' sport?*

Playing With Purpose

Sports provide the biggest platform for positive change

- *Can you use your sponsorship to tackle societal issues like discrimination or health?*
- *Are there ways you can leverage the power of the athletes to tackle issues?*
- *Are there opportunities for sponsors and rights holders to work together on specific areas?*
- *Can you integrate your sponsorship into your CSR plans?*

“Don't go in as a brand and just bring your logo. One of the richest things you can do is to make the experience better.”

Roel de Vries, global head of marketing and brand strategy at Nissan

What's Next?

We hope you have enjoyed this report and that it has helped you to better understand the evolution of fandom.

For more information on sport-specific trends or for ideas on how to prepare your business for the future fan, please contact:

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About Performance Communications

Launched in 2002, Performance Communications is a specialist sports and automotive communications agency. We believe in the power of the fan and are dedicated to the development of fan-focused campaigns that deliver real business impact for brands.

We service clients from offices in Kingston-upon-Thames and Dubai.

www.performancecomms.com

About Canvas8

Canvas8 is the UK's leading behavioural insights practice. We help organisations grow through a better understanding of people. Primarily focused on communications, media and product development, our award-winning insights inspire clients like Channel 4, Mindshare, MTV, Nike, Ogilvy and Samsung. Supported by our network of experts, from TED speakers to MIT fellows, and underpinned by innovative methods, we work at the intersection of market research, trend forecasting and strategic consultancy.

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