



**ENGAGING
THE
YOUNGER
GENERATION**

OF FOOTBALL FANS

CHARLIE MARSHALL

ECA CEO



For many of us working in the sports industry it is not only our daily business, it is a way of life. It is a passion. This is what makes sport, and football in particular, so special.

Just as the uncertainty of the result helps drive mass media interest and huge TV audiences for live football, so the passion and support of fans for their football club, often handed down from generation to generation, helps drive unconditional loyalty.

But times change. Technology now offers us new ways of consuming popular entertainment and sport, both online and in the flesh, or sometimes a merged virtual reality of the two worlds. Football is no different.

Fans remain at the heart of every football club. Recent attempts at hijacking the sport have shown us that. Fans support their club through thick and thin, encouraging them on the pitch through hard times and celebrating with them their victories. Fans deliver the crucial match atmosphere for television broadcasters, they drive engagement and following in local areas and they support and publicise their clubs through the conversations they have and the shirts that they wear.

Today's football fans are confronted with many challenges for their attention. Clubs can no longer rely on having their unconditional loyalty.

Clubs must work harder than ever to attract the new generation of fans. That is why understanding how and where they consume football is important for all clubs in Europe.

“Fans remain at the heart of every football club. Clubs must work harder than ever to attract new generations of fans. Only by listening can we learn and improve”

We must improve our dialogue with fans across all age-groups. We need to listen to them and learn from them. Only by listening can we learn and improve.

At ECA we have learned to listen to our stakeholders and that includes the fans. An improved dialogue with stakeholders and fans can only benefit each and every one of us.

The research work being done in this area is vital for all of us in the game if we are to make sure that football remains relevant and inclusive for all stakeholders.

We must make it a priority in our daily work as we look towards the future of the game and use it as an opportunity, not a threat, in order to protect and grow the game that we all love and cherish so much. ■



LASSE WOLTER

ECA DIRECTOR COMMERCIAL & BUSINESS DEVELOPMENT

For some time now, there has been a debate about whether younger age groups are less interested in football – and sports in general - or whether they just want and need to be engaged in different ways.

In this edition of our fan research series, we are exploring this issue in more detail, and we will hear directly from fans about what drives them and what they want to get from the sport.

By doing so, we want to uncover the many opportunities that exist for clubs to engage with existing fans in new and different ways, while understanding the opportunities to attract a newer, younger fan base that derives from these changes.

“We found that young people want and expect different things from the sport than other age groups. This will allow clubs to build new relationships and in turn increase their overall fan bases”

We've been exploring the ways in which the very young age groups connect with football: what triggers their interest, how they participate and play, how they watch and follow and what barriers to fandom they experience.

We found that young people want and expect different things from the sport than other age groups, have different motivations for engaging and are put off by different factors; this creates opportunities for clubs to engage with young people in new ways that are meaningful and relevant to these age groups.

This will allow clubs to build new and additional relationships and in turn increase their overall fan bases.

We also found that young people in the US

and China, where fandom itself is a younger phenomenon than in Europe, have different motivations and needs compared to those in Europe. These are potentially huge markets; and it will be important to be proactive about what new fans want if clubs are to maximise their opportunities to develop football as a sport for these growing audiences.

We believe that if clubs can embrace these changes, they will find many new ways to excite and engage young people, building a new generation of fans.

Doing so will require clubs to reassess what they consider fandom to be and derive new ways of measuring success. We hope that this work and its insights will provide helpful guidance and support on this exciting journey. ■

CONTENTS

1

THE CHANGING FACE OF FOOTBALL FANDOM

Building engagement by understanding underlying motives and needs

P6

2

THE BARRIERS TO FOOTBALL FANDOM

Attracting the next generation by countering barriers to younger fandom

P24

3

IDENTIFYING OPPORTUNITIES AMIDST CHANGE

Key take aways and recommendations for clubs

P32

REPORT STRUCTURE

Our first report, published in 2020, focused on building the framework for our research programme, a representative pan-European audience segmentation – a means of better understanding the different types of fans that exist today, and how we can better cater for their individual motives and needs.

The very positive feedback from clubs and other industry stakeholders encouraged us to do more. Starting in the 2021/22 season, we embarked on “always on” research programme, enabling us to release fresh insights on various existing and arising trends as well as identifying and highlighting opportunities for football clubs on a quarterly basis.

The selection of themes of our research series are developed and overseen by the ECA Research

Task Force - made up of representatives from ECA Member Clubs – and the valuable feedback from you the clubs, to ensure we deliver tangible and highly relevant content for club football.

METHODOLOGY

The data was collected through our Future of Fandom tracker, an ‘always on’ online survey of football followers conducted by independent research and strategy consultancy, MTM Sport. We interviewed a representative sample of football followers aged 16+ across nine markets in Q4 of 2021, broken down as follows:

- ▶ **Europe: 2,134 respondents (c.300 per market)**
- ▶ **North America: 906 respondents respondents**
- ▶ **China: 906 respondents**

European markets included in the research were the UK, France, Germany, Spain, Italy, Netherlands and Russia – allowing us to explore differences within the major fan centres, as well as delivering a pan-European view covering a range of different market sizes and cultures.

Quotas were set within markets on age, gender and region to ensure that the sample was reflective of the general football following population. Respondents who said they are not interested in football were not included in the sample.

Throughout the report, references to “statistical significance” can be understood as follows:

In statistical terms, a significant difference between two research results is a difference that is large enough that it is highly likely it didn’t arise by chance. Where there is a significant difference between two groups of respondents, it means that a real difference is likely to exist between these groups.

Given our focus on young people specifically within this report, we have not made use of the Future of Fandom segmentation.

However, this segmentation will feature prominently in future reports within this series, and we encourage you to refer to our initial report to find out more on how this segmentation can provide a better understanding of wider fan engagement. ■



THE CHANGING LANDSCAPE

OF FOOTBALL FANDOM

**BUILDING ENGAGEMENT BY UNDERSTANDING
UNDERLYING MOTIVES AND NEEDS**

IN THE SPOTLIGHT

YOUNGER FANS ARE...

**LESS
LIKELY**

TO 'IDENTIFY'
WITH A CLUB
OR FOLLOW A
TEAM JUST BECAUSE
THEIR FAMILY DOES

**MORE
LIKELY**

TO HAVE THEIR
FANDOM
INFLUENCED BY
SOCIAL MEDIA
CONTENT ON
TIKTOK OR
YOUTUBE

**MORE
LIKELY**

TO BE
MOTIVATED
BY FITNESS
AND
PARTICIPATION
IN THE US
AND CHINA

In order to understand how the football landscape is changing and what the fans of today and tomorrow want, we explored why people became interested in football in the first place, and how this differs by age.

We also looked at what fans get from following the game and the needs it fulfils.

Finally, we looked at key emerging markets – the US and China – where following football is relatively new compared to Europe, to see how followers' motivations and needs differ and what opportunities there are for clubs to promote the support to new fans.

CONTENT AND EVENTS ATTRACT YOUNGER FANS

When we looked at football fans overall, we found a wide variety of factors act as catalysts to get people interested in the sport.

CATALYSTS TO FOOTBALL FANDOM

People get interested in football for a range of reasons

- Family influence ● Social influence ● Activity influence ● Team and club influence
- Location influence ● Players influence ● Content influence ● Events influence



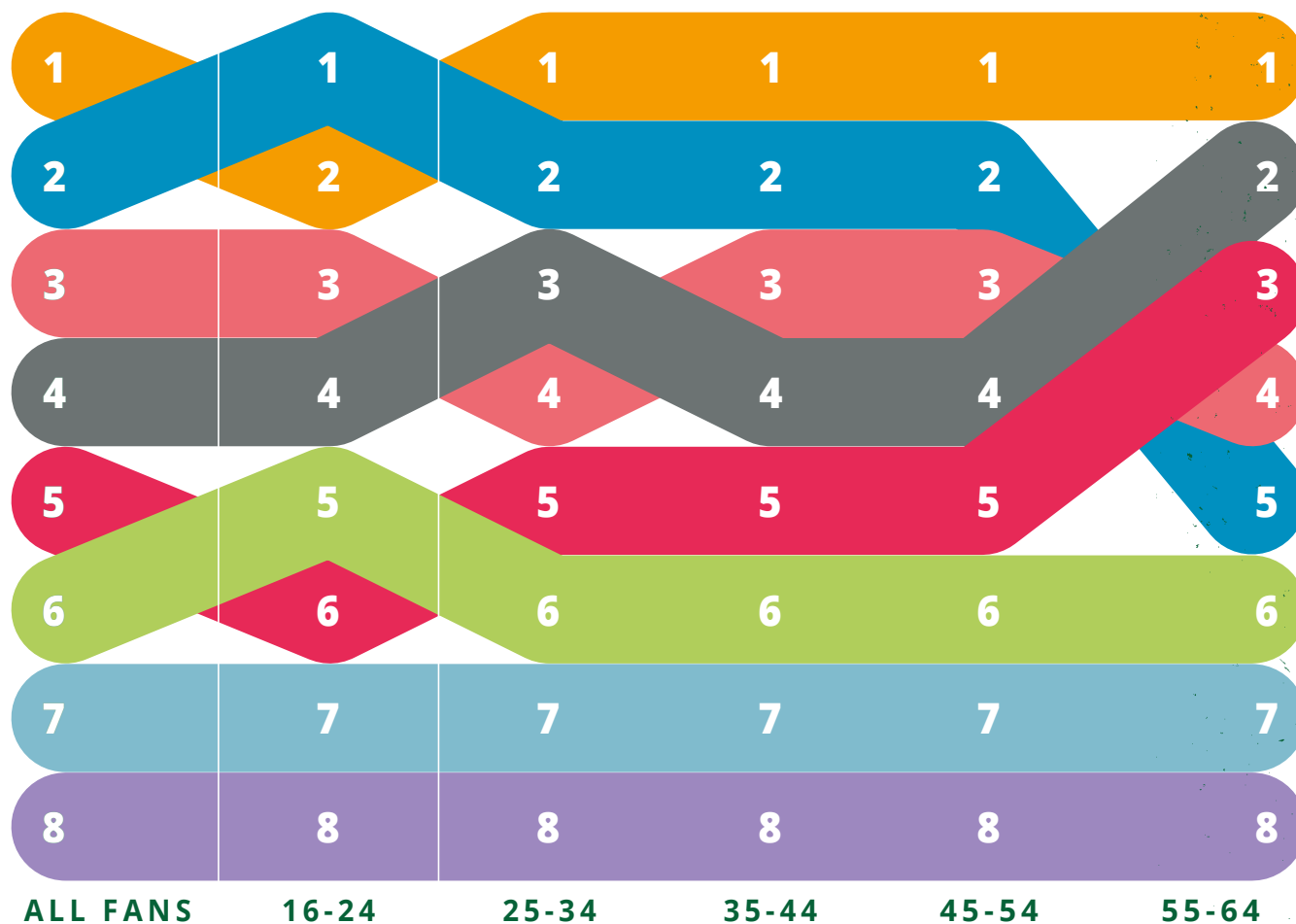
Looking at fans by age group, we can see that although the influence of family is still the most widespread driver, younger fans are more driven by content - including on TV and social media. Events are also more of a driver for the 16-24 age group than for fans as a whole - this may also be down to social media and seeing more major events content shared and posted than other age groups.



MOST WIDE REACHING CATALYSTS TO FOOTBALL FANDOM RANKED BY AGE GROUP

Younger people are more likely to be influenced by content and by events

- Family influence ● Social influence ● Activity influence ● Team and club influence
- Location influence ● Players influence ● Content influence ● Events influence



Source: MTM.ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021): Question B@. Which, if any, of the following reasons contributed to you starting to become interested in football?
Base: All football fans in Europe (the UK, France, Spain, Germany, Italy, Netherlands, Russia) Aged 16-24 (355), 25-34 (519), 45-54 (422) 55-64 (302).

While watching matches between big clubs remains a strong influence for all age groups, we see that younger people are significantly more likely to have been engaged by watching short-form content such as highlights on YouTube or on social media. They are also more likely to cite players on social media and club partnerships with brands as a driver for being interested.

CATALYSTS TO FANDOM FOR AGES 16-24

Young fans are more likely to be driven by social media content


CONTENT
39%

Big clubs on TV	Highlights on YouTube	Highlights on social media	Players on social media	Club/brand partnerships
19%	16% ↑	16% ↑	12% ↑	11% ↑

Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021); Questions B1-B12

Base: all football fans in Europe (the UK, Germany, Italy, Spain, France, Netherlands) aged 16-24 (355)



↑
Significantly higher than average across other age groups



FOOTBALL FULFILLS A RANGE OF NEEDS

We asked fans about a range of needs that football might fulfil. We have grouped these needs into six main “need states” – the underlying, emotional needs that engagement with football fulfils. Of these need states, three are widespread and three are less so, across all age groups, as follows:

- To **socialise** with friends and family
- Because my **partner/ family** are engaged with it
- To be **entertained**
- To see **quality** football matches
- Because of how **interesting** it is
- For the **unpredictability**
- To **follow the bets** I've placed on matches
- To **follow** my team
- Because it is **relatable**
- Because I am **emotionally invested** in it
- For a sense of **community**
- Because I like the **players**
- To give me something to **watch**
- It's good for when I am **bored** and there is nothing else to do
- I **play** football, and therefore I follow football

PRIMARY NEED STATES

SECONDARY NEED STATES



PRIMARY NEED STATES

EXPERIENCE

Football as a form of entertainment – fans follow for the excitement and the unpredictability.

IDENTITY

Football fulfils a deeper emotional need delivering a sense of community, belonging or attachment to a club.

SOCIAL

Football is inherently a social activity that enables fans to connect, delivering a sense of community, belonging or attachment to a club.

SECONDARY NEED STATES

CHARACTER

Some fans connect to football specifically through players, possibly looking for role models and aspirational figures.

UNWIND

For some fans (although this differs by market) football is less about active engagement and more about passive following - an option for something to watch or a way of filling time.

ACTIVITY

For a minority of fans, football offers a way to participate and engage in physical activity.



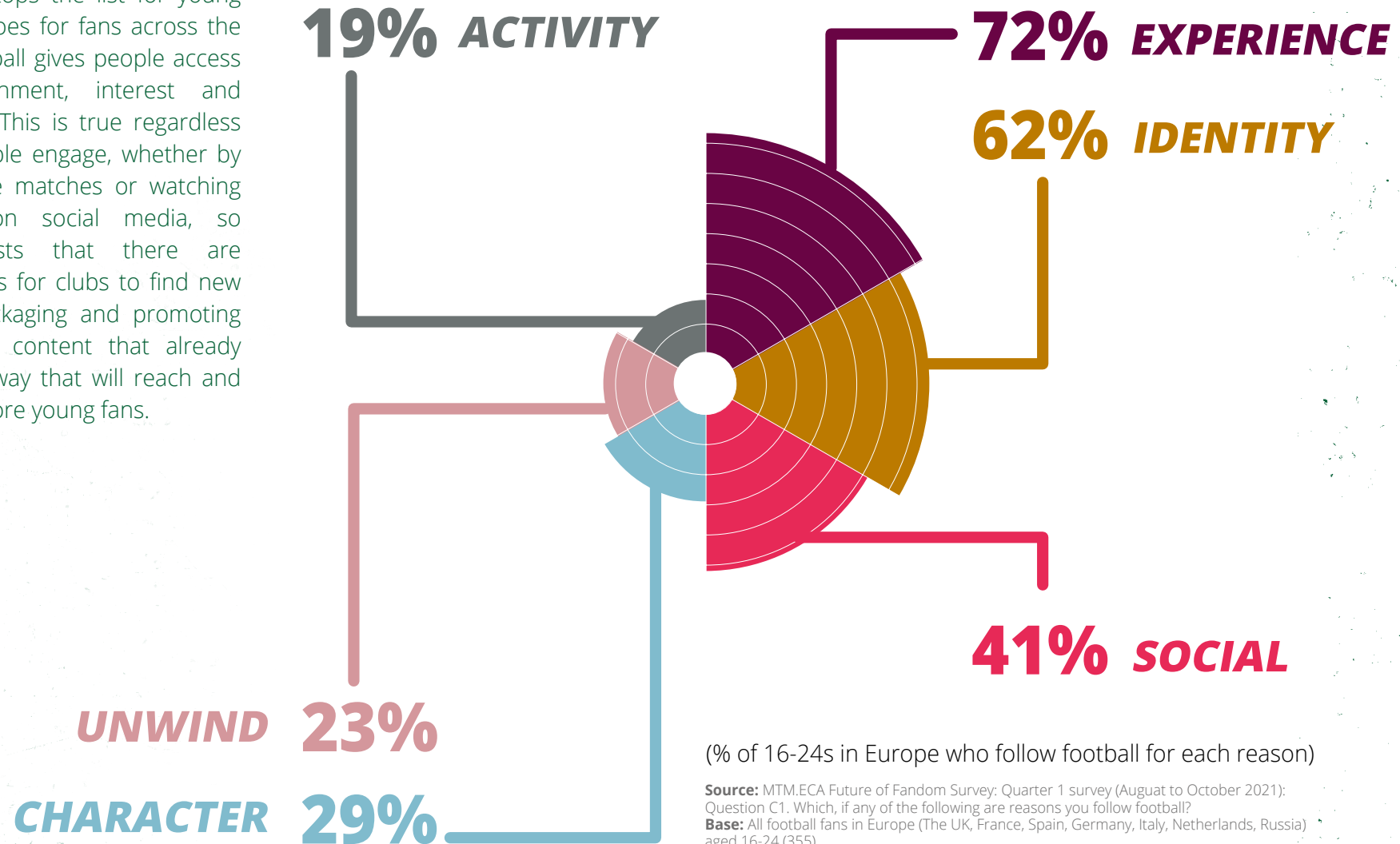
We've explored the top three need states for fans aged 16-24 (experience, identity and social) in more detail.

EXPERIENCE

Experience tops the list for young fans, as it does for fans across the board. Football gives people access to entertainment, interest and excitement. This is true regardless of how people engage, whether by going to live matches or watching highlights on social media, so this suggests that there are opportunities for clubs to find new ways of packaging and promoting the exciting content that already exists, in a way that will reach and appeal to more young fans.

YOUNG FANS CRAVE THE ENTERTAINMENT THAT FOOTBALL OFFERS

Experience is the most widespread need state amongst young fans

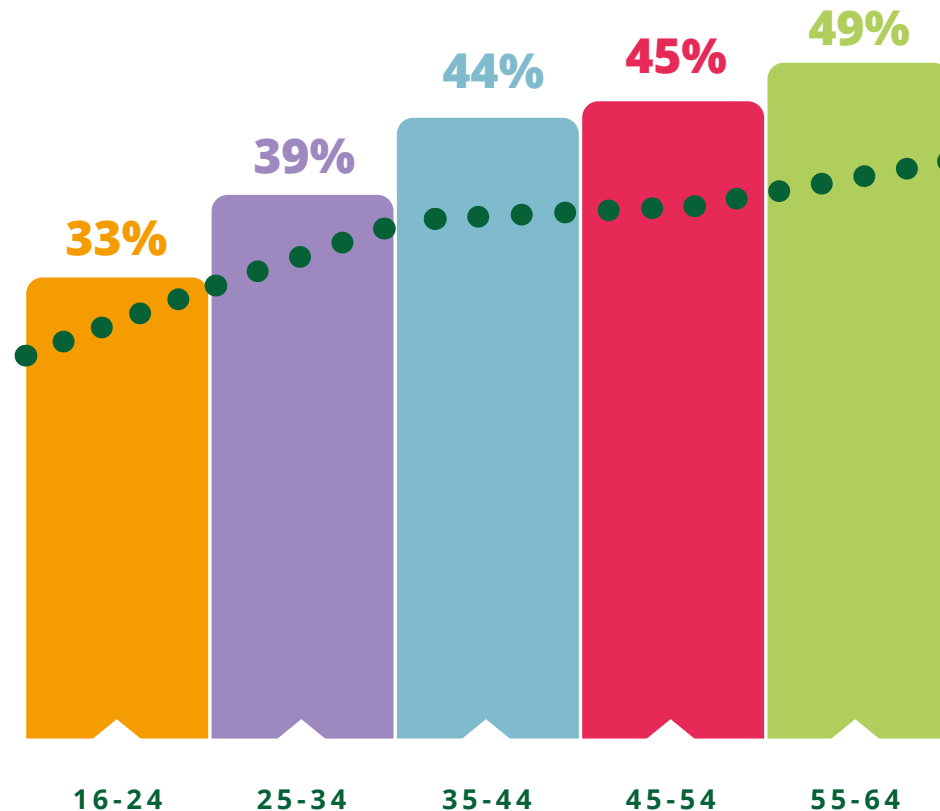


IDENTITY

Identity is second most widespread amongst young people, with 62% citing identity as a need state. However, this is significantly lower than the proportion of older people citing identity. A key part of identity is following a particular club or team. This is also significantly lower in importance for younger people. Put this together with the finding that family is less of a driver for them and it suggests that football may be becoming less tribal and local, and more universal and global: young people are used to engaging with others across the world via digital networks and often carve out online spaces to explore their identities that are unlikely to be used by their parents and older family members. These fans may be more likely to pick their football watching experiences from the multitude of routes available to them online, rather than through the more traditional, narrow route of the team handed down to them by their parents.

IMPORTANCE OF 'FOLLOWING MY TEAM' AS A NEEDSTATE FOR FOLLOWING FOOTBALL

Younger fans are less likely to cite 'following my team' as a need



Source: MTM/ECA Future Fandom Survey: Quarter 1 survey (August to October 2021): Question C1. Which, if any, of the following are reasons you follow football?

Base: All football fans in Europe (The UK, France, Spain, Germany, Italy, Netherlands, Russia) aged: 16-24 (355); 25-34 (536); 35-44 (519); 45-54 (422)- 55-64 (302)

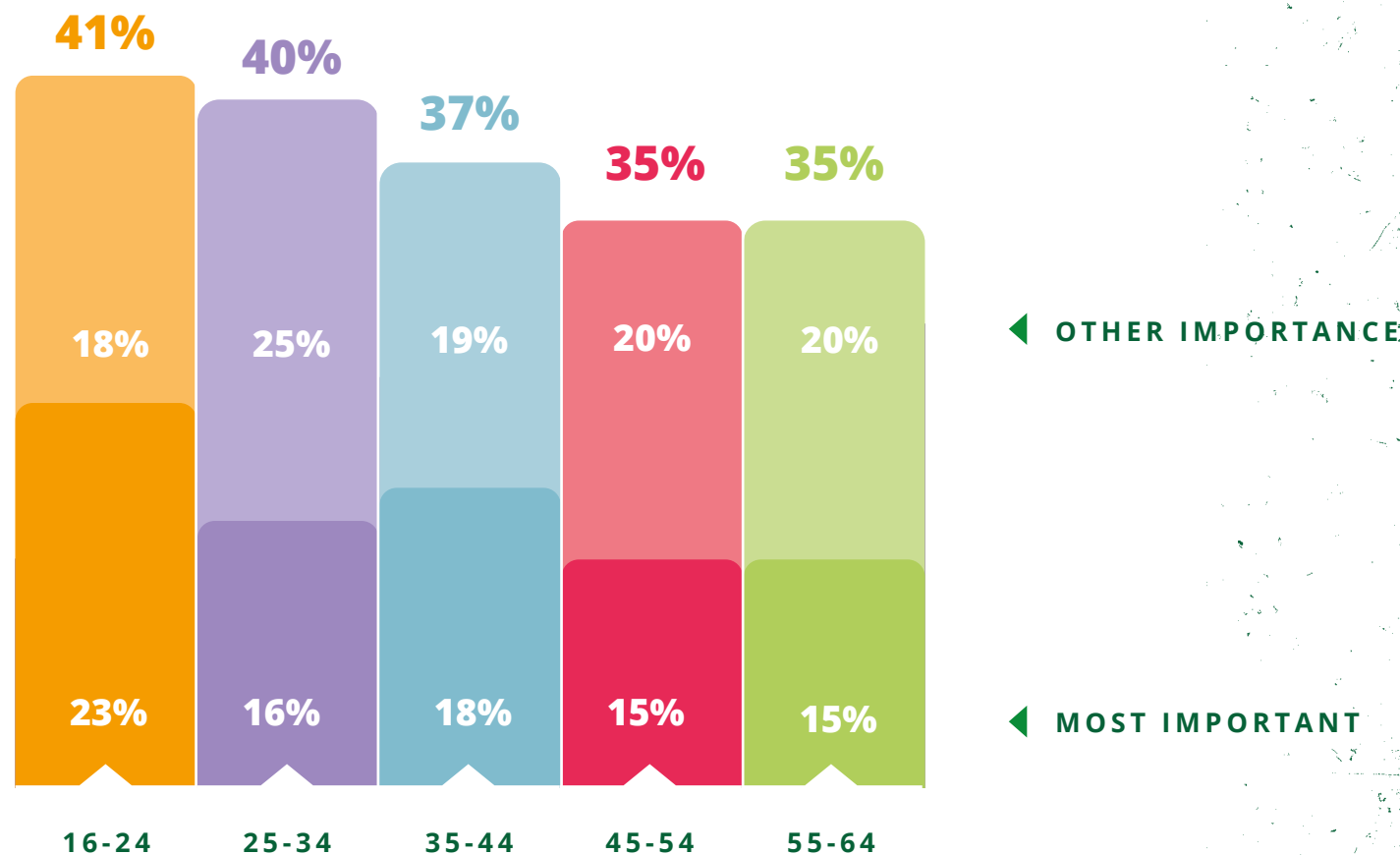
(% selecting 'to follow my team' as a reason to follow football)

SOCIAL

Social aspects are more likely to rank as most important for young people. The definition of 'social' is also different for younger people. Those aged 16-24 are significantly more likely to engage with other fans by watching football in pubs and public places and, critically, by interacting on social media. Again, exciting content has a role to play in fulfilling fans' needs not just for entertainment but also to socialise and engage with others.



SOCIALISING IS A KEY NEEDSTATE FOR FOLLOWING FOOTBALL

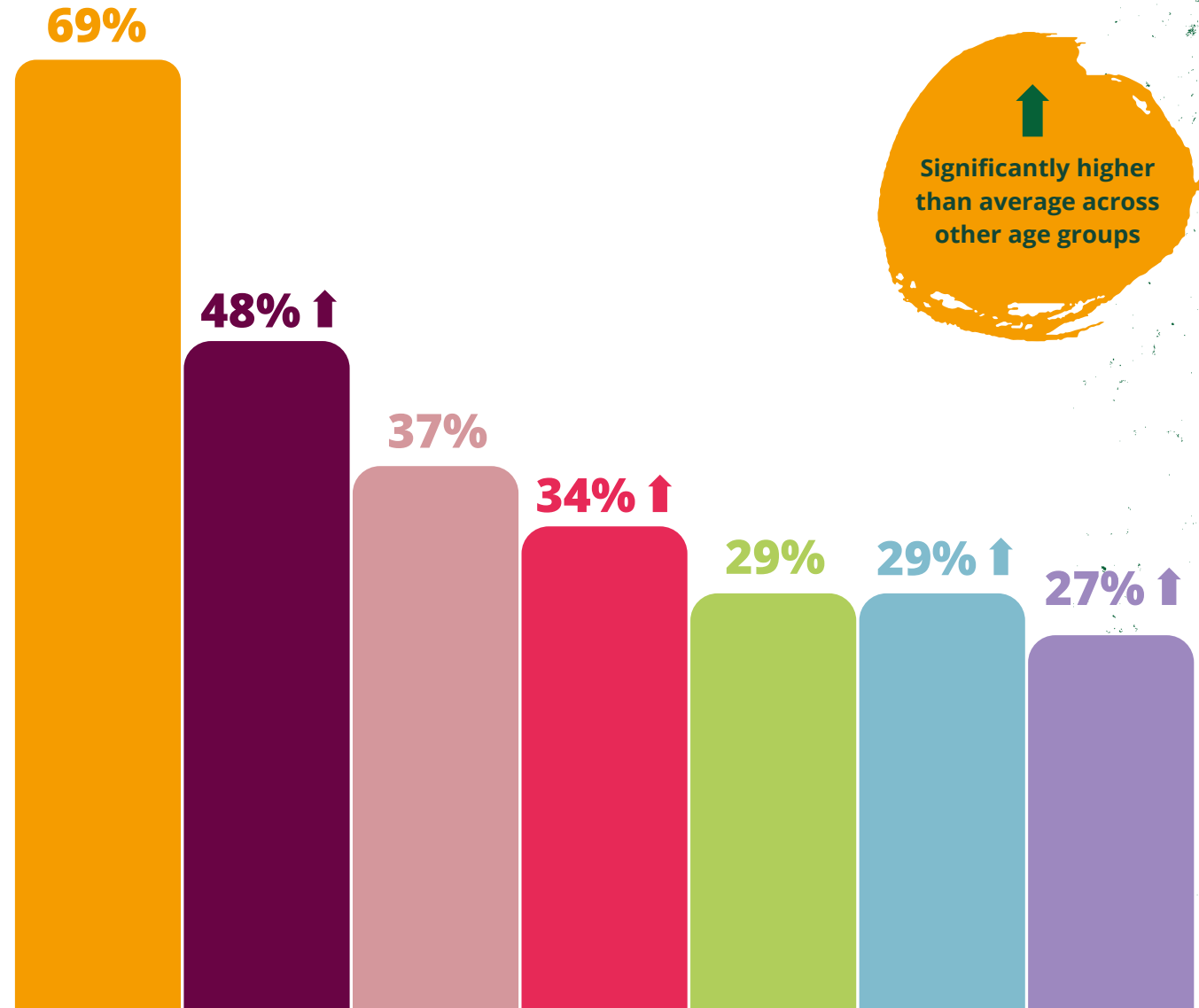


(% amongst age group in Europe for whom 'social' is a needstate/important needstate)

Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021): Question C1. Which, if any, of the following are reasons you follow football?
Base: all football fans in Europe (the UK, France, Spain, Germany, Italy, Netherlands, Russia) aged: 16-24 (355); 25-34 (536); 35-44 (519); 45-54 (422); 55-64 (302)

THE SOCIAL NEED STATE PLAYS OUT DIFFERENTLY FOR YOUNGER PEOPLE

- Watch matches at home
- Watch at bar or pub
- Attend live matches
- Watch at other public places
- WhatsApp group chats
- Interact on social media
- Post content on social media



(% of all 16-24 year old football followers in Europe who engage socially through the following)

Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021): Question C1. Which, if any, of the following are reasons you follow football?
Base: all football fans in Europe (the UK, France, Spain, Germany, Italy, Netherlands, Russia) aged: 16-24 (355); 25-34 (536); 35-44 (519); 45-54 (422); 55-64 (302)

GROWTH OPPORTUNITIES IN THE US AND CHINA

Football is not just changing in Europe. Around the world, new fans are becoming engaged in the sport, and European clubs have a huge role to play in stimulating interest and creating a new global fan base.

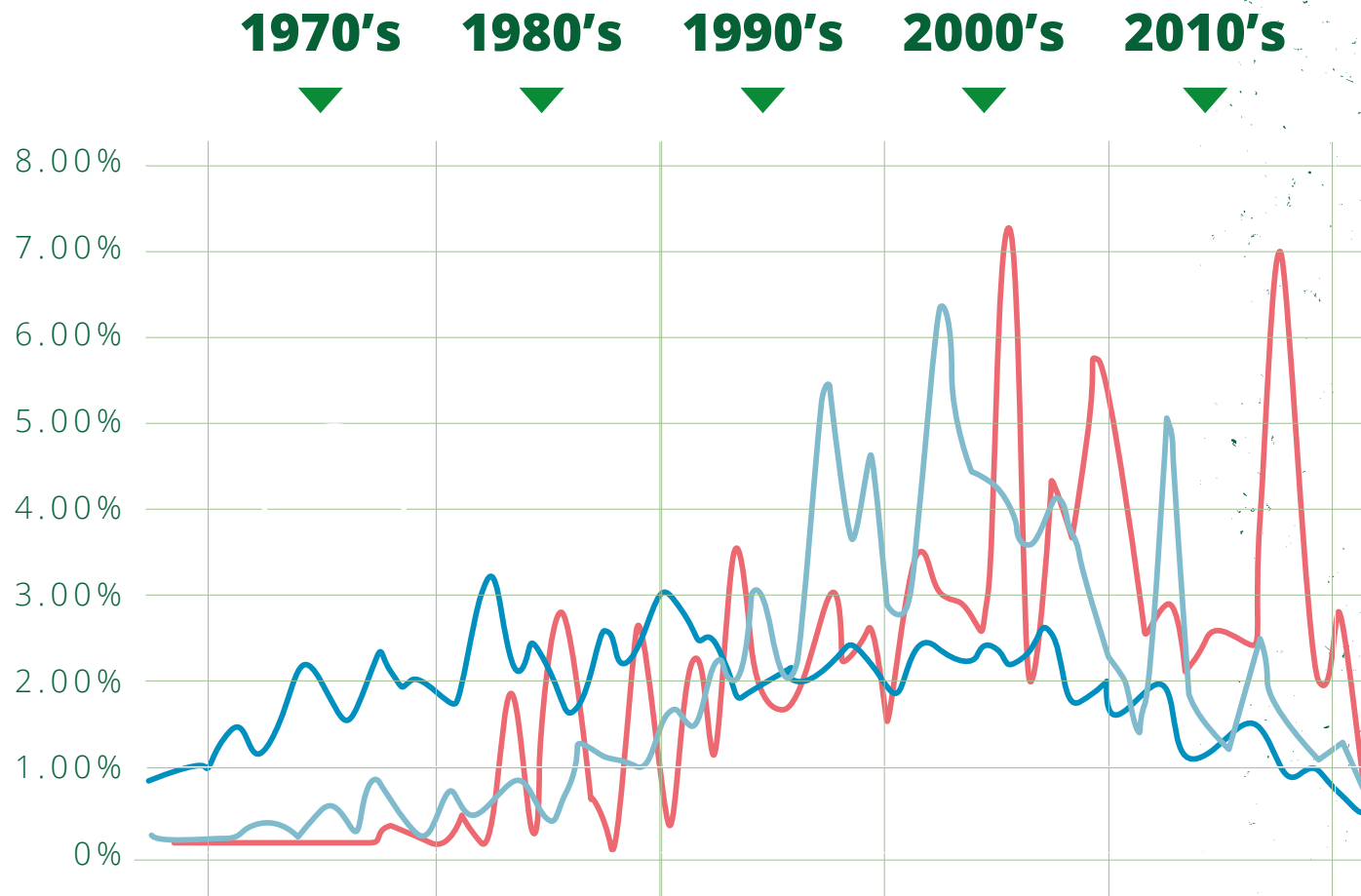
We've conducted research in the US and China because both markets are seeing rapid recent growth in football fandom and both have large and relatively wealthy populations.

As such, there are considerable opportunities for clubs in each market. Popularity increased in the 1990s in US, sparked by hosting the 1994 World Cup, and in the 2000s in China, driven by government investment in the game and by the 2002 FIFA World Cup which took place in South Korea and Japan – the first to be hosted in Asia.

● Europe ● USA ● China

YEAR IN WHICH FOOTBALL FANS FIRST STARTED FOLLOWING BY REGION

Fandom increased sharply in the '90s in the US and in the next decade in China



(% of all football fans in each region who started following in each decade)

Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021); Question B1. How old were you when you started following football? If you don't remember exactly, please provide us with your best estimate

Base: all football fans in Europe (the UK, France, Spain, Germany, Italy, Netherlands, Russia) aged: 16-24 (355); 25-34 (536); 35-44 (519); 45-54 (422); 55-64 (302)

Given the more recent emergence of mass football fan bases in these markets, what motivates these fans is similar to the younger fans in Europe. There are, however, some key differences, primarily in fitness and participation, club influence and events.

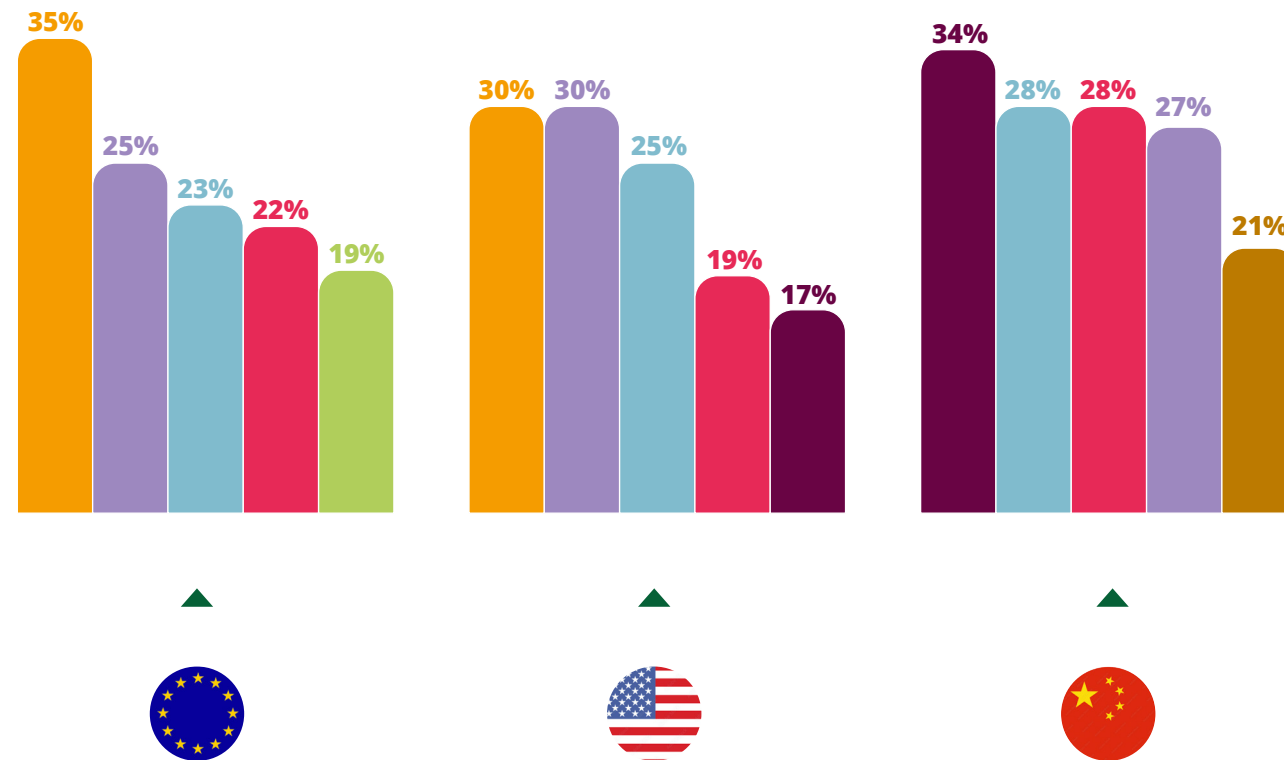
FITNESS & PARTICIPATION

The focus in China is much more on playing the game than in the other markets, both for fitness reasons and as a way of playing with friends. Fitness is also a top-five driver in the US. Family influence is the top driver in the both the US and Europe but if we dig into the 'family' driver, we can see on the graph on the next page that family influence in the US is more about participation than about passive following.

This presents a key opportunity for clubs to increase involvement in participation in both markets by offering schools and academies, training and associated engagement, products and services.

TOP 5 CATALYSTS TO FOOTBALL FOLLOWING BY REGION

- Family were football fans
- My friends were football fans
- It was a way of playing with friends
- Started seeing more football on TV
- Favourite club was successful
- It was a way of keeping fit
- I like a particular player



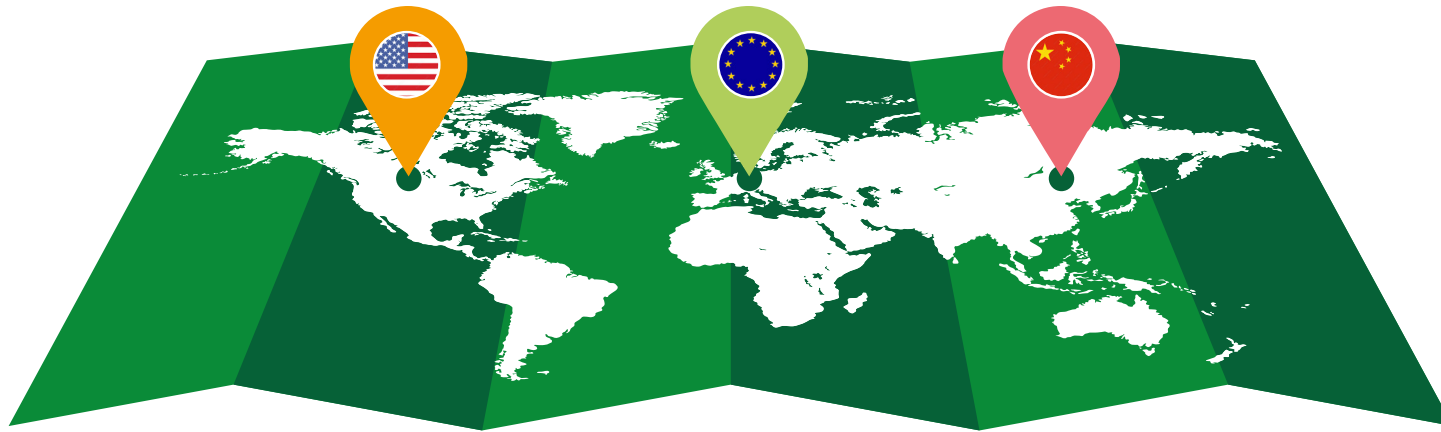
(% of all football fans in each region selecting statement as one of their top 3 most important catalysts)

Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021); Question B9. And which, if any, of the following are reasons that [INSERT PLAYER NAME FROM A8] was interesting to you?
Base: all football fans in Europe (the UK, France, Spain, Germany, Italy, Netherlands, Russia) aged: 16-24 (355); 25-34 (536); 35-44 (519); 45-54 (422); 55-64 (302)

REASONS FOR FAMILY INFLUENCE ON FOOTBALL ENGAGEMENT

Family influence in the US is more about participation than tribalism

● USA ● Europe ● China



	USA	Europe	China
Encouraged me to play	1	5	2
Football was a way to feel closer to them	2	6	7
Football was a way to spend time with them	3	1	1
They encouraged me to watch football	4	3	4
I support the club I do because of my family	5	2	3

(Rank order by market based on % who select each answer option – highlighted number signifies the top influence factor)



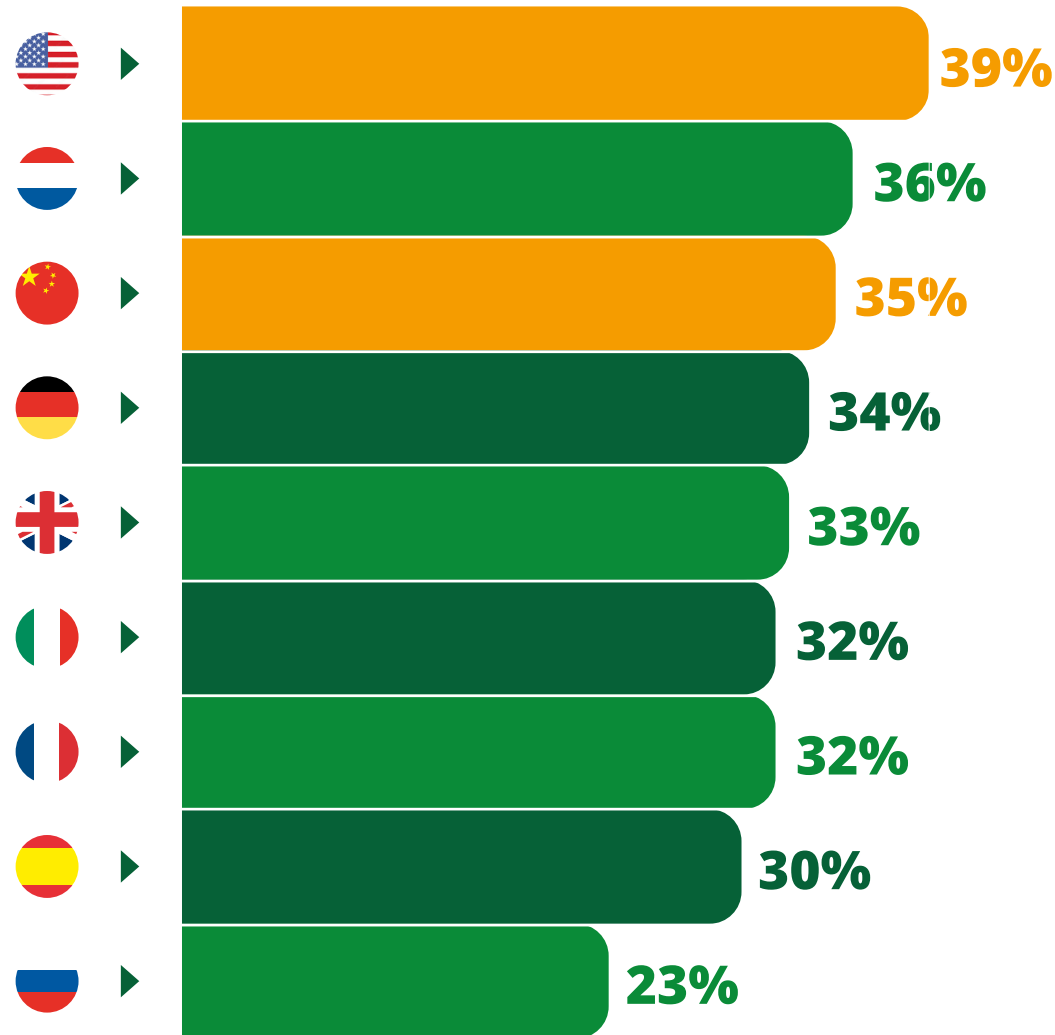
Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021); Question B4 You mentioned that family or specific members of your family played a role in you becoming interested in football. Thinking about the role that your family or members of you family played, which, if any, of the following reasons helped encourage your interest?
Base: 16-24s football fans in Europe (the UK, Germany, Italy, Spain, France, Netherlands) (137), USA (40), China (55)

CLUB INFLUENCE

Clubs have an important role to play. 39% of fans in the US said they were influenced to follow football due to the success of a team. There are opportunities in China too – 35% of fans in China cite team success as a catalyst.

TEAM AS A CATALYST TO FOOTBALL FANDOM

More people in the US and China said they were influenced by a successful team, than in most other markets



Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021); Question B2. Which, if any, of the following reasons contributed to you starting to become interested in football? Question A9. And of the clubs that you support, if you had to pick one that you are the biggest supporter of, which would it be?

Base: All football fans in then United States (900)

(% of all football fans in each region selecting statement as one of their top 3 most important catalysts)

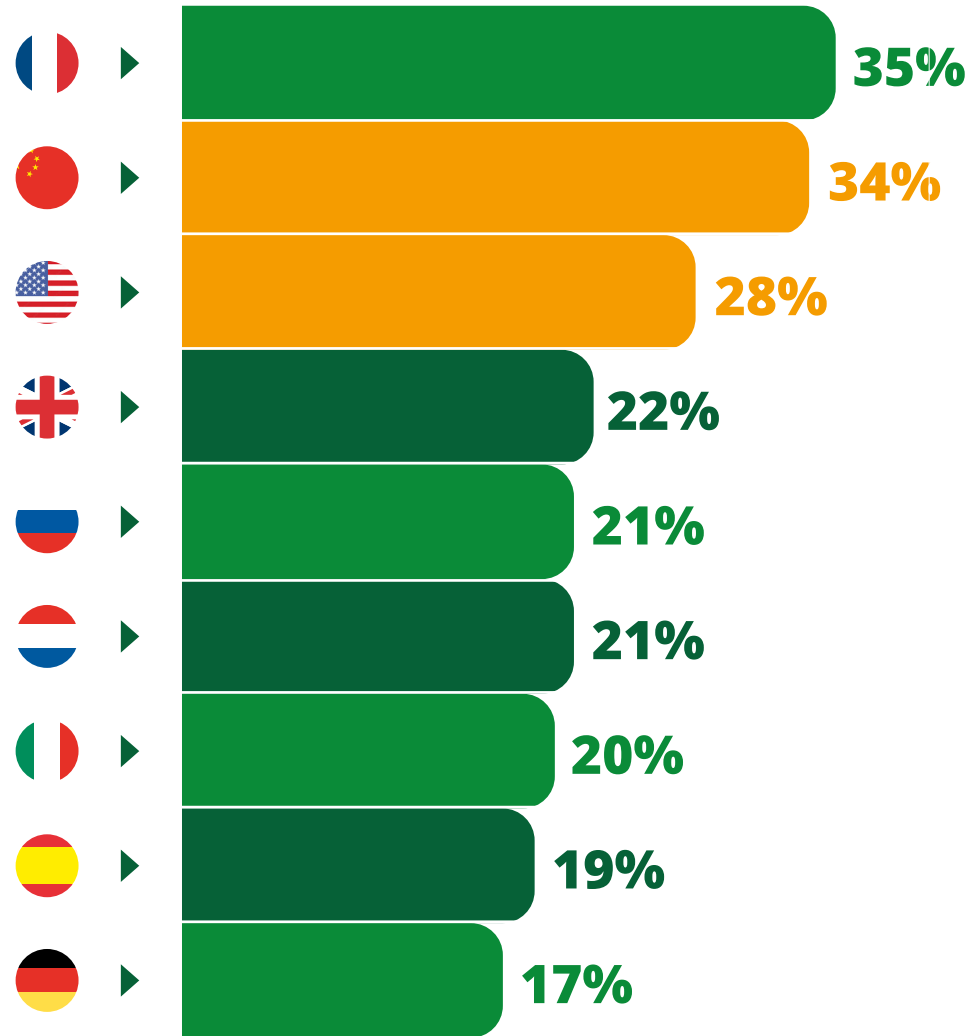
EVENTS

Events are of greater importance in China and the US than in most other markets, and that European events carry significantly more influence.

Again, this highlights that there are opportunities for European clubs and competitions to build on this interest and influence; to increase the availability of European club football to these audiences, and allow exposure to these events to continue building further and deeper interest and engagement.

EVENT AS A CATALYST TO FOOTBALL FANDOM

Events are a widespread catalyst in China and the US



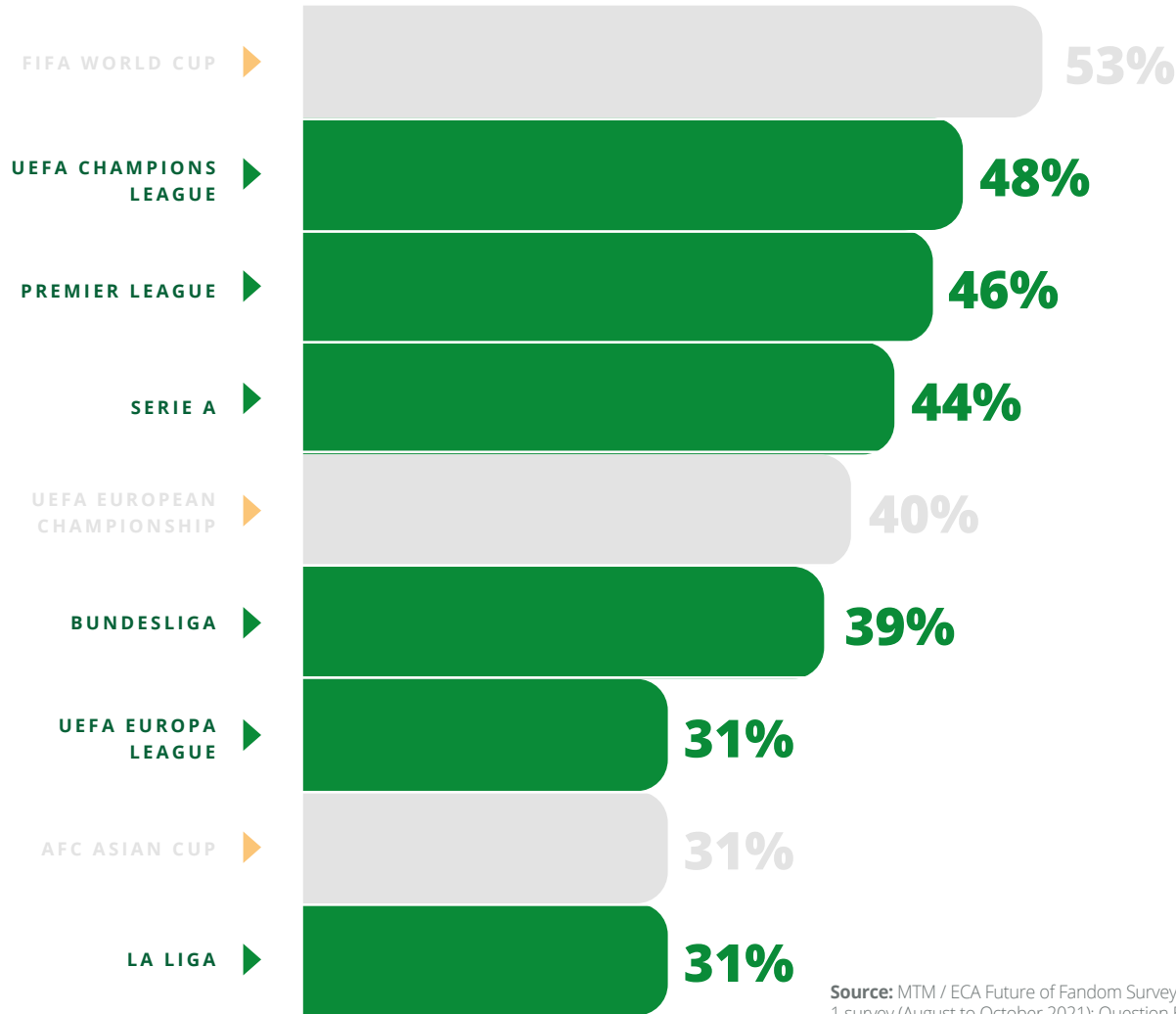
(% of all football fans in each market who were influenced to start following football by a major competition or event)

Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021); Question B2. Which, if any, of the following reasons contributed to you starting to become interested in football? Question A9. And of the clubs that you support, if you had to pick one that you are the biggest supporter of, which would it be?

Base: All football fans in then United States (900)

COMPETITIONS AS A CATALYST TO FANDOM

Events are a widespread catalyst in China



(% for whom each competition promoted football fandom)

Source: MTM / ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021); Question B12. You mentioned that a specific competition or event played a role in you becoming interested in football. Which, if any, of the following helped encourage your interest in football?
Base: All football fans in China (900)



SUMMARY

WITH CHANGE COMES OPPORTUNITY

Football fandom is changing and younger fans are engaging differently than other age groups. They love to consume football content and are, unsurprisingly, much more focused on social media, which lends itself to exciting short-form content.

They are also excited by events and use football as a way to socialise. They still identify with clubs but the more traditional 'tribal' approaches to football are on the wane.

There are opportunities here for clubs to embrace these new ways of engagement and to continue to build a strong fan base amongst younger people.

Fandom in the US and China is comparatively new and as such, is different again from traditional European fandom, with a focus on fitness and participation as well as a healthy interest in European clubs and events.

There are opportunities for clubs to raise their profile and increase their impact on fandom by giving fans in these markets as much access to digital services and video content as possible (live, on demand, highlights), opportunities to attend meaningful local live matches and events, plus schools/education programmes, training and merchandise. ■





2

THE BARRIERS

TO FOOTBALL FANDOM

ATTRACTING THE NEXT GENERATION BY
COUNTERING BARRIERS TO YOUNGER FANDOM



IN THE SPOTLIGHT

YOUNGER FANS ARE...

**MORE
LIKELY**

TO BE
CONCERNED ABOUT
SOCIAL ISSUES AND
HOW THEY PLAY OUT
IN FOOTBALL

**MORE
LIKELY**

TO BE
CONCERNED
ABOUT RACISM
AND MENTAL HEALTH
IN FOOTBALL

**MORE
LIKELY**

THAN OLDER AGE
GROUPS TO SAY
FOOTBALL IN ITS
CURRENT FORM ISN'T
RELEVANT TO THEM

THE BARRIERS TO FOOTBALL FANDOM

Young fans engage differently with football, and this creates opportunities for clubs. Clubs need to understand the barriers that prevent young people from engaging with football.

SOME BARRIERS TO FANDOM ARE COMMON ACROSS ALL AGE-GROUPS...

The top five barriers to football fandom are fan culture, the cost of football, the lack of different types of football covered in the media, fans' lack of time to engage and confusion about where to find football content. These barriers were stated across fans from different age groups and countries.

FAN CULTURE

There is a widespread concern about certain aspects of fan culture and behaviour. Clubs and regulators have a huge role to play here in improving behaviour in and around stadia on match days so that people feel safer and more comfortable to attend.

However, culture goes beyond what happens on match day: clubs can go much further by aspiring to have inclusive and diverse conversations with fans and

to promote positive messaging around football, both online and offline, respectful and welcoming to all.

COST

There is always an opportunity for clubs to think creatively about pricing and access – are there ways of offering reduced cost tickets to live football or other low-cost ways of giving access to football content in service of creating more sustainable long term value for club and fan alike?

TYPES OF FOOTBALL CONTENT

The huge interest in the Women's EURO and ever increasing audiences within the women's club game proves that fans are eager for more than just the traditional men's game.

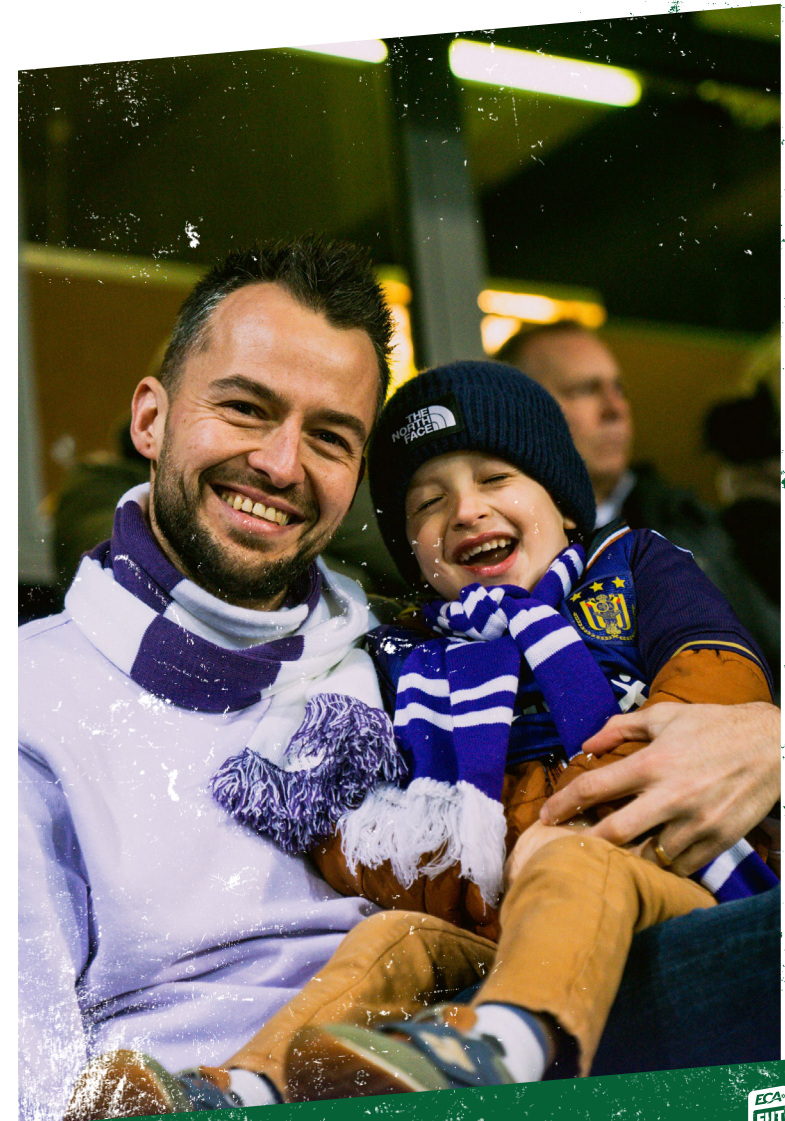
This is a massive opportunity to bring in new fans and to offer exciting and different content to existing audiences.

LACK OF TIME

There is an opportunity here for clubs to create short-form content that fans can fit in around other commitments. The more exciting the content, the more likely fans are to make the time to view it.

This presents an opportunity for clubs to engage fans by signposting when and

where the best content can be found. Clubs need to be targeted in their approach as sometimes fans can feel overwhelmed or confused by the amount of content available. ■



...WHILST OTHERS AGAIN HAVE MORE IMPACT ON YOUNGER AUDIENCES

Younger fans experience the same barriers, but with one key difference. The biggest barrier amongst the 16-24 age group is relevance, with 58% agreeing that 'football today is not particularly relevant to people like me.'

This was significantly higher than in other age groups. The main barrier to football when considering all age groups was the behaviour of football fans and fan culture (47% of fans of all ages).



YOUNGER FANS ARE SIGNIFICANTLY MORE LIKELY TO SAY THAT FOOTBALL ISN'T RELEVANT

● % aged 16-24 ● % all age groups

↑
Significantly higher than average across other age groups

"Football today is not particularly **relevant** to people like me."

58↑ 34

"It **costs** too much to follow football today."

53 44

"Different types of football should be given more **media** coverage."

42 44

"**Confusing** to have so much football on different TV channels/ networks."

38 40

"I **don't have time** to follow football more than I already do."

41 44

So what does ‘not particularly relevant’ mean? One of the key issues we found was that young people can see the concerns they have in wider society reflected in football. This is true not only for the 16-24 age group but also for fans aged 25-34.

This perception is fuelled by controversies and can set the sport at odds with these younger fans’ values.

Two of the most pressing issues for younger people are racial equality and mental health, but we also know that younger people are more likely to see factors such as environmental issues, gender equality and domestic violence as barriers to football, relative to older generations.

RACIAL EQUALITY

Football has been working for many years to tackle racism and discrimination. Racism can affect the game at every level but the most high profile is often the racist abuse of players on the pitch.

These days, much (but not all) of this abuse that players receive has moved from the stands to the online world – FIFPRO, in partnership with the National Basketball Players Association (NBPA), and the Women’s National Basketball Players Association (WNBPA) released *Decoding Online Abuse of Players* in June 2022: the first cross-sport study of online abuse directed at professional athletes.

And this abuse is not limited to racism; homophobic and sexist abuse are also widespread.

Football stakeholders and governing bodies can’t tackle this alone – government and social media platforms are also involved in the fight to tackle this scourge – but it is vital to ensure that the issue is kept at the top of the agenda. “It is deeply concerning that there are so many triggers for this abuse,” said FIFPRO President David Aganzo. “We cannot stand by and allow players to face a barrage of discrimination just because they are in the spotlight.” ■



MENTAL HEALTH

There used to be a stigma around mental health, meaning that many people suffered depression and anxiety in silence. In recent years, the stigma has reduced and people have started to speak out about their mental health. It is now an obvious fallacy that successful sports people don't suffer from mental health issues: the pressure to succeed can weigh heavily and sporting stars have the same life worries and fears as everybody else. Fan culture, which can sometimes seem to be "macho" and not supportive of expressing vulnerability, can also contribute to the problem.

Football has a key role to play, not only in protecting the mental health of players and others who work within the sport, but also in starting and sustaining conversations to continue the work of destigmatising the issue, such as the #FeelWellPlayWell campaign by UEFA with support from various national team head coaches, including Portugal, Croatia and Iceland ■

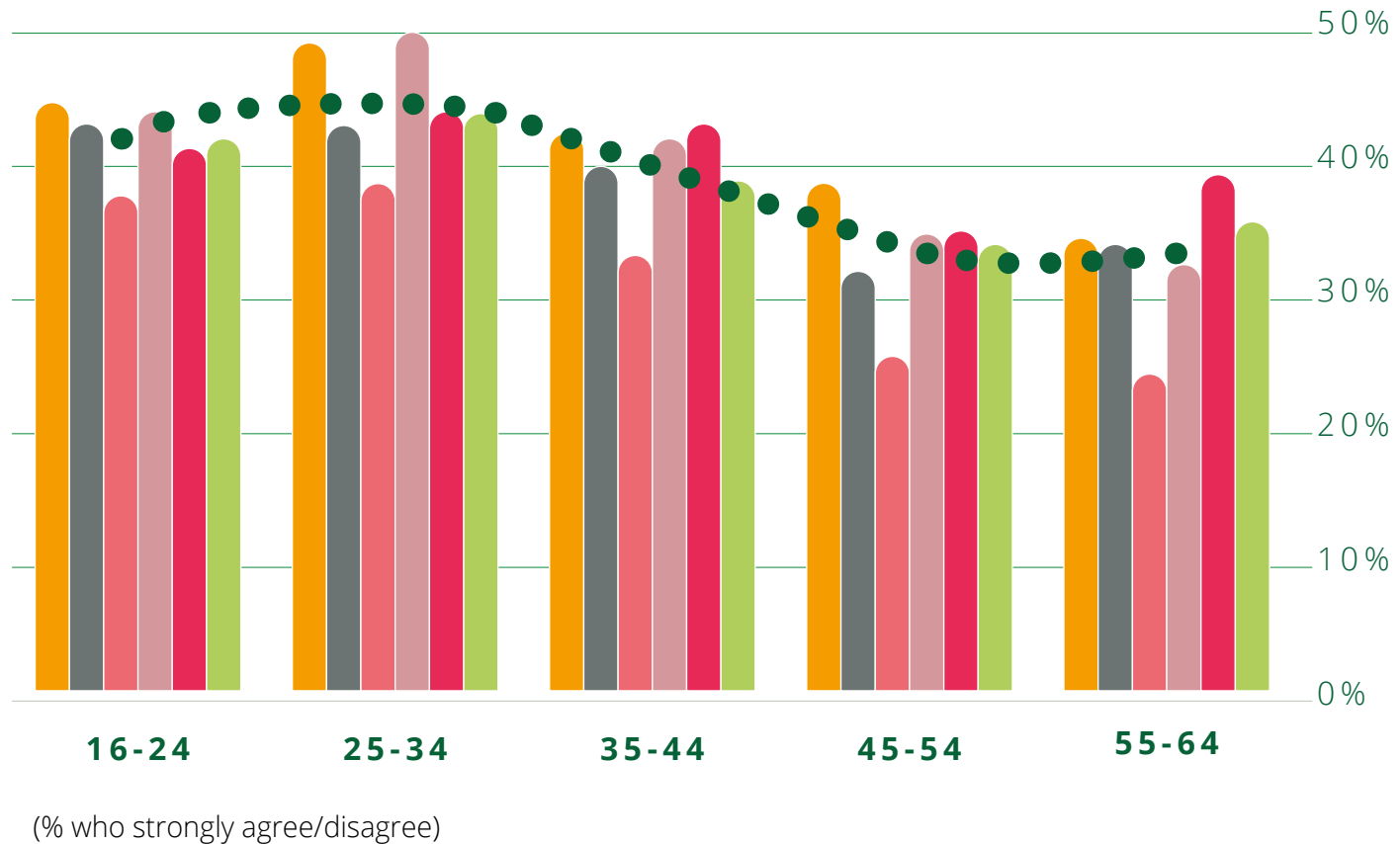


Not only is there a moral imperative to tackle all these societal issues but, on top of this, there is also an opportunity. Football has a platform, and a major one at that. When young people start to see football not as the source of these issues but as a part of the solution, they may also start to see the sport as more relevant to their lives.

SOCIETAL ISSUES AS A BARRIER TO FOOTBALL ENGAGEMENT

Younger people are more concerned about societal issues

- Racial equality ● Gender equality ● LGBTQ+ issues ● Mental health issues
- Domestic violence ● Environmental issues ● Average



Source: ECA/MTM Future of Fandom Survey, August & September & October 2021. D2 Thinking about some of the issues facing wider society today, how important or unimportant would you say each of the following are to you? (T2B Very important/important) D3 And to what extent do you agree or disagree that the follow issues stop you from engaging more with football? (T2B Strongly agree/agree). Arrow = significant difference at 95% confidence level. Base: All football fans in Europe (The UK, Germany, Italy, Spain, France, Netherlands) aged: All fans (2134), 16-24 (355), 25-34 (536), 35-44 (519), 45-54 (422), 55-64 (302)

SUMMARY

BE PART OF THE SOLUTION

There are certain barriers to fandom, such as fan culture and costs, that impact all fans; football can do much to ease these concerns and make the sport more accessible and appealing.

However, to focus on our target of younger people, we need to look at social issues and putting in solutions, rather than reinforcing the problem.





3

IDENTIFYING OPPORTUNITIES

A M I D S T C H A N G E

RECOMMENDATIONS FOR CLUBS

IDENTIFYING OPPORTUNITIES AMIDST CHANGE

We've seen that football fandom is changing. Young fans engage differently and so won't be as receptive to clubs' traditional approaches to growth and retention.

This age group still wants the excitement and entertainment that football provides, but will consume it differently: online, via highlights or focusing on the moments around the match rather than the match itself.

They are also more likely to be put off if they see social injustices such as racism or poor mental health reflected in the game. Fans in new markets such as the US and China want opportunities to participate, and to see more of the European clubs they admire.

When we understand the different ways that younger fans engage with football and the barriers to engagement, we begin to see opportunities to attract the younger fans that clubs need for the future. It's not just about sporting success: clubs that provide great, highly accessible and ubiquitous content and are seen as leaders in tackling societal issues will create opportunities to build their brands and attract new fans. We believe that clubs should focus on the following four opportunities:

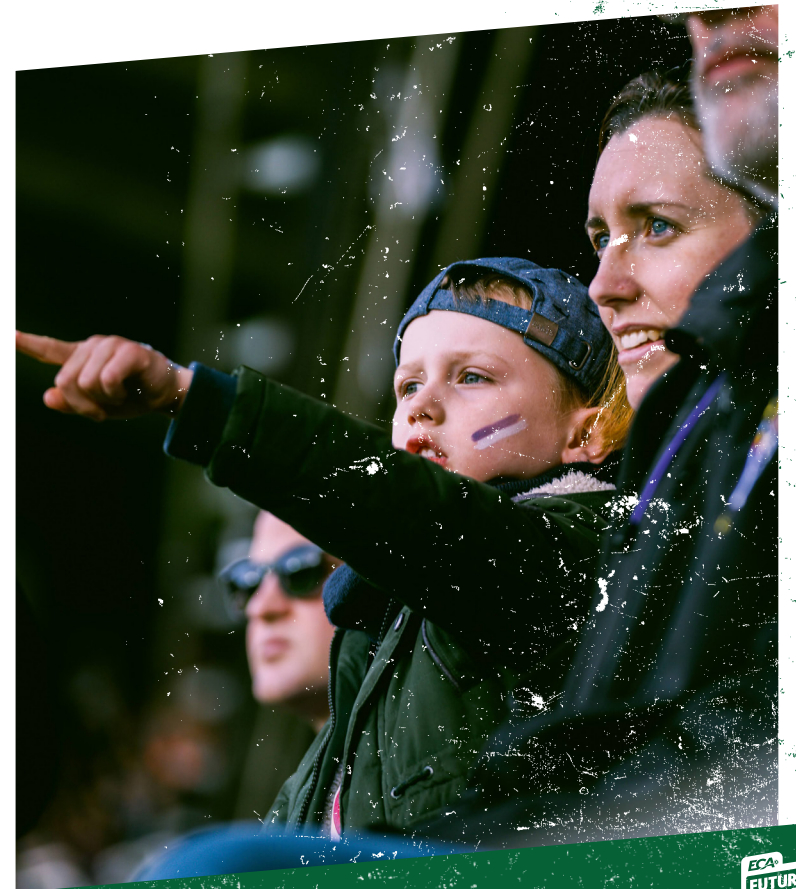
CREATE COMPELLING AND AGE-GROUP SPECIFIC CONTENT

Clubs should focus on creating more, as ubiquitous as possible, content including putting highlights on social media. Shorter-form content is key and will also start to address the barrier of not having enough time to follow football. Social media is an incredibly powerful tool with which to engage younger fans. If they like the content, they will do the clubs' and competitions' marketing job for them and share it with their friends. Capturing the shareable benefits of social media is an important consideration for future media rights deals for clubs, competitions and broadcasters.

Individual players can be a great asset to clubs. Our research showed that 20% of 16-24 year olds say they follow their favourite players on social media. This is significantly higher than other age groups. Often, the social media accounts of players are highly personal and more individual so there is an opportunity for clubs and players to become more aligned and work together to create content that will excite and engage young fans.

Many content approaches will work in the more emerging markets we explored too –

the US and China. Although many US fans follow a US team as their secondary club, their primary fandom is typically directed at major European or English clubs, so access to content about European clubs is likely to increase US fandom. In China, European events are a particular driver so access to content around these events will be of interest. Social media sites in China are different but content can be created that will work on all platforms. ■



PIGGYBACK ON OTHER INTERESTS

We asked younger fans in Europe about their other interests, such as other types of football, fashion brands and eSports, and whether they would welcome club involvement. Young fans are significantly more likely than older age groups to say that other types of football, partnerships with fashion brands and eSports would drive their interest in football. Brands are quick to recognise these partnership opportunities. Younger fans are also significantly more likely to want to see club involvement in video gaming, fashion, photography and dancing.

ROLE FOR CLUBS IN IMPROVING INTEREST

% of 16-24's in Europe who agree each statement would drive greater interest in football

Branch out into other types of football, e.g. Women's team/futsal

58%

Partner / collaborate more with **fashion** brands

56%

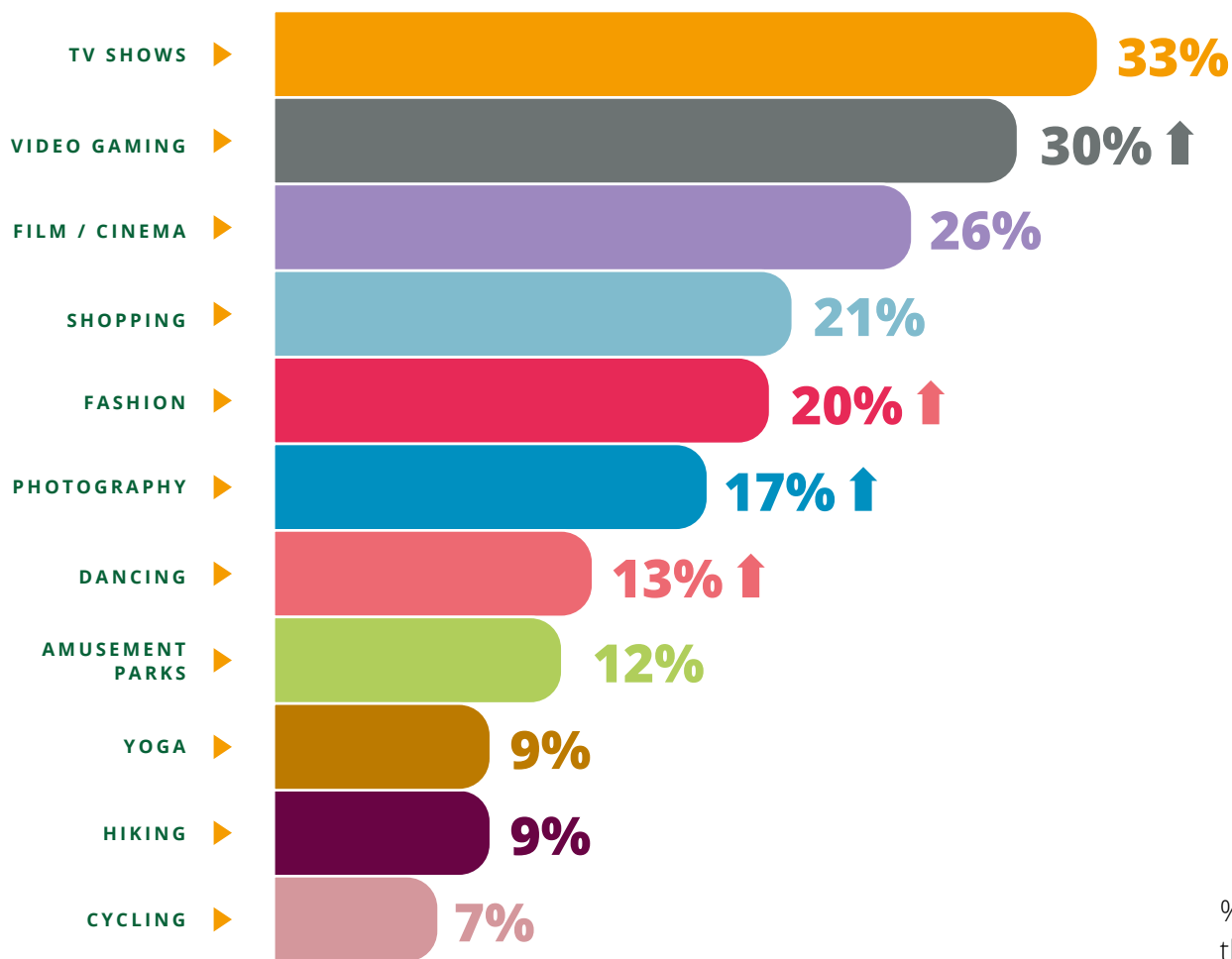
Become more directly involved in **eSports**

48%



POTENTIAL CLUB ENGAGEMENT IN INTERESTS

Opportunities for clubs to engage fans via other interests



↑
Significantly higher than average across other age groups

% of 16-24's in Europe who are interested in each of the below and would like to see more club involvement

Source: ECA/MTM Future of Fandom Survey, Quarter 1 survey (August to October 2021); Qeation C13. And thinking about things clubs could do to make you more interested in football, how interested would you be in each of the following? Question E3. And thinking about your wider interests, which, if any, would you like to see your favourite club (s) become more involved in?
Base: All football fans in Europe (the UK, Germany, Italy, Spain, France, Netherlands) aged 16-24 (355)

ADDRESS SOCIAL ISSUES

Fans expect football's governing bodies and clubs to take the main responsibility for addressing social issues, such as racial equality, that can act as barriers to fandom. Individual players can be an asset here too.

There are many examples of players taking up causes, who have credibility with this age group and can be great ambassadors.

Our research showed that many young fans report becoming interested in football because of players who took a stance on social issues (31% of those saying players were a catalyst), and that 20% of 16-24 year olds say they like their favourite player because of what they stand for. Young fans claimed they would listen more to players than to clubs.

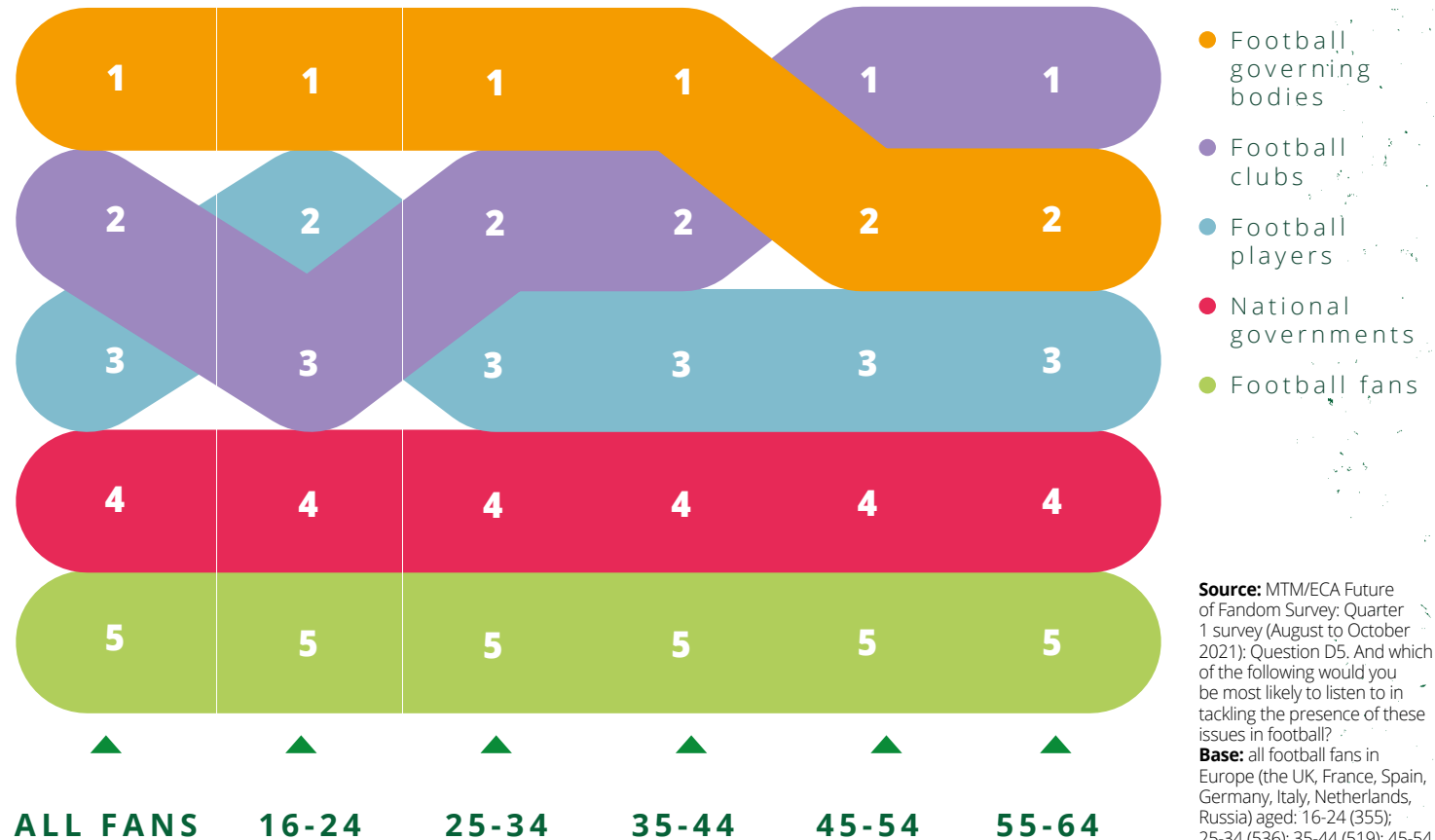
Often, players pick a cause because it is personal to them and reflects their life story - e.g. Marcus Rashford and child food poverty. The opportunity for clubs is to align messaging with players and support them in their individual endeavors. In addition, clubs must explore what they can do

to stand against these issues, offer practical solutions and encourage players to take up these causes.

If both clubs and players take a stand on issues of social injustice, more will be done, clubs will build their brands, fans will identify and players will feel supported. Everyone wins.

WHO WOULD YOU LISTEN TO IN TACKLING ISSUES FACING FOOTBALL?

Younger fans look more to players than to clubs to address societal issues



(Rank of most listened to source amongst fans in each age group)

Source: MTM/ECA Future of Fandom Survey: Quarter 1 survey (August to October 2021); Question D5. And which of the following would you be most likely to listen to in tackling the presence of these issues in football?
Base: all football fans in Europe (the UK, France, Spain, Germany, Italy, Netherlands, Russia) aged: 16-24 (355); 25-34 (536); 35-44 (519); 45-54 (422); 55-64 (302)

TAILOR YOUR APPROACH

IN EMERGING MARKETS



IN THE US

Football (or soccer) has proved an increasingly popular participation alternative to traditional American sports for a number of reasons.

- ▶ It is less dangerous than many US sports, with American football in particular carrying significant health risks
- ▶ It is often cheap and accessible to participate; not requiring specialist equipment or facilities
- ▶ It is relatively simple at grassroots level, avoiding complex rules or "plays"
- ▶ Clubs taking a role in encouraging participation, such as producing educational content, or opening schools and academies, have an opportunity to encourage football fandom while also developing club affection and loyalty.



IN CHINA

The Chinese Government has publicly stated plans to improve the quality of football in the country, and for the national team to be competitive by 2050.

- ▶ Improve the quality of the national football leagues through increased investment and liaising with clubs from other markets
- ▶ Improve the level of participation at grassroots level through school participation and soccer schools.
- ▶ This direct intervention is reflected in the catalysts to fandom amongst Chinese fans, with participation a significantly more common and powerful route into the game than in other countries.
- ▶ Events and competitions have also played a major role in promoting fandom in China. European club competitions, as well as European domestic leagues, are more prominent than in other markets and are bringing Chinese people into the sport.

Giving fans greater access to European competitions would likely increase their ability to promote fandom.

TIME TO ENGAGE!

This is the time to engage with the younger generation of fans. Clubs have many opportunities to attract and grow this age group through relevant approaches such as content and partnerships, through collaborating with their players, addressing social issues and tailoring approaches to markets.

ECA is available to help and support you at every step along the way of that journey. In case you are interested in engaging or to learn more about the programme, please reach out to:

services@ecaeurope.com





WWW.ECAEUROPE.COM

© @EUROPEANCLUBASSOCIATION 🐦 @ECAEUROPE in EUROPEAN CLUB ASSOCIATION