Fan of the Future

Defining Modern Football Fandom

EUROPEAN CLUB ASSOCIATION

Fan of the Future - Defining Modern Football Fandom

1 Introduction

1.1 Project objectives

The consensus amongst those working in football, both within clubs and related organisations, is that fandom has changed. These changes in consumer habits and the broader entertainment landscape have fundamentally altered what it means to be a fan today.

Global factors affecting modern football fandom

Improved mobile connectivity	Mobile penetration has rapidly increased around the globe, enabling fans to consume content on-the-go. With 5G still to come, football clubs, competitions, and players have never been more accessible
Linear TV viewing decline	Traditional TV is being disrupted as linear viewing declines, driven by changes in 16-24-year old consumption habits. Engaging younger audiences requires new strategies from clubs, competitions, and broadcasters
Social media proliferation	Social media provides fans opportunities to engage with their favourite clubs, leagues, and players across a variety of social channels, enabling clubs to form unprecedented direct relationships
Diversification of football content distribution	Clubs are finding new ways to connect with fans online, creating more touchpoints across different forms of media, including articles, videos, podcasts, and more
OTT launches	The launch of sophisticated OTT services, including Kayo, Disney+, and Peacock, amongst others, underpinned by advanced technologies facilitate new opportunities for content personalisation and recommendation
Fans' expectations of clubs	Consumers today expect brands, including football clubs, to focus beyond their core offering. It is no longer enough for clubs to compete; they need to demonstrate a level of social responsibility and community awareness aligned with fan values

The anatomy of a football fan has evolved significantly; with fans following individuals over clubs, turning to social media highlights over live games, and following previously inaccessible behind-the-scenes footage. Whilst this has opened new avenues for football clubs to drive engagement and increase revenue, it poses some significant risks.
Fans have more choice, with different entertainment formats – from documentaries to YouTube highlights reels – competing for eyeballs in the attention economy.

In addition to these risks, the 2020 COVID-19 pandemic is impacting global football more substantially than any other market trend of the last decade. It has devastated certain leagues, with fans of others experiencing large gaps between games or denied access to stadiums to watch their favourite teams. This has a repercussive effect on how fans spend their leisure time or dedicated Saturday afternoons.

Despite these changes, current research is inconsistent and not comprehensive. For example, consumer research carried out by individual clubs and organisations on social media, broadcasting and eSports, has only led to a piecemeal understanding of today's football fan, and, as such, only partial strategies for how to engage them.

For this reason, ECA engaged MTM Sport to provide a holistic view of what it means to be a football fan today, covering a range of topics from club affinity, engagement levels, and modern consumption behaviours. This report, with findings from an in-depth quantitative study carried out in seven targeted markets around the world, is the starting point of an ongoing ambition by ECA to create the definitive guide to the modern football fan.

Ultimately, ECA intends to use this insight to help clubs better understand the different types of football fans that now exist globally, and inform them on the delivery of strategies that increase engagement and grow the sport overall. This report is the first step on that journey, uncovering fresh insights into how different people relate to and engage with football in all its forms.

1.2 Approach and methodology

The primary consumer research featured in this report was carried out in seven markets. These were chosen by ECA to reflect a broad range of market types; from those with dominant domestic leagues and avid fandom (UK, Spain, and Germany) to markets that are less concentrated (Poland and the Netherlands), and non-European markets where the history and legacy of football fandom is different (India and Brazil).

The breadth of markets enables understanding of different types of European football fans, while the non-European markets offer comparisons of two fundamentally different types of global market with varying levels of football fandom. Each market, and other countries with similar football dynamics, represents different opportunities for football clubs and organisations.

Markets covered

All surveyed markets were based on a nationally representative sample of 2,000 people aged 8-64, giving a total global sample of 14,000. Respondents completed a 20-minute online survey, translated and localised to each market. 8-12s completed a shorter questionnaire more suitable for their age group and, as a result, 8-12s are not included in the segmentation.

As well as informing our segmentation, the questionnaire was designed to test a number of hypotheses around modern football fandom, categorised by club affinity, underlying engagement, and consumption behaviours. The aim was to evidence our hypotheses, as well as to uncover new hypotheses that will continue to be explored by consumer research in the future.

Examples of the **hypotheses** that are covered in the research to date include:

AFFINITY:

- Modern fans want to follow clubs that do more than just 'play football'
- Club following is more 'temporary' among younger fans
- Fans of today support more than just one club

ENGAGEMENT:

- Football fandom varies significantly for different demographics and fan segments
- The main reason that people move away from football is cost

CONSUMPTION:

- Fans want to have more unique experiences, which are vital in securing long-term fandom
- Fans consume more 'out of home' football content that is available free of charge
- Watching live matches is not important to modern fans, especially to younger audiences who prefer short-form and on demand content

1.2.1

A note on COVID-19

Fieldwork was conducted in January 2020 before the COVID-19 outbreak disrupted international sports and wider society. The data collected is therefore reflective of the time when the survey was carried out, but some topics will have changed, both in the immediate behaviours of fans and in the long-term expectations of how the industry should react.

The ongoing global pandemic has the potential to drastically change how fans engage with football and football clubs in the future. However, given the current uncertainty, this has not been addressed extensively throughout this report, which focusses on football fandom in general and the main ways that this fandom is expressed in 'normal' times. Assessing the long-term impact of COVID-19 requires further research and investigation.

1.2.2

Definition of a 'football fan'

Anyone who expressed interest in football is included in the analysis, as defined by each respondent's answer to the question "How much do you follow football?". Those who responded with an answer between "I'm a huge fan" to "I follow it in passing" are included in the analysis and segmentation.

For the question, "How much do you follow football?", 'interest' refers to responses 1-4 below

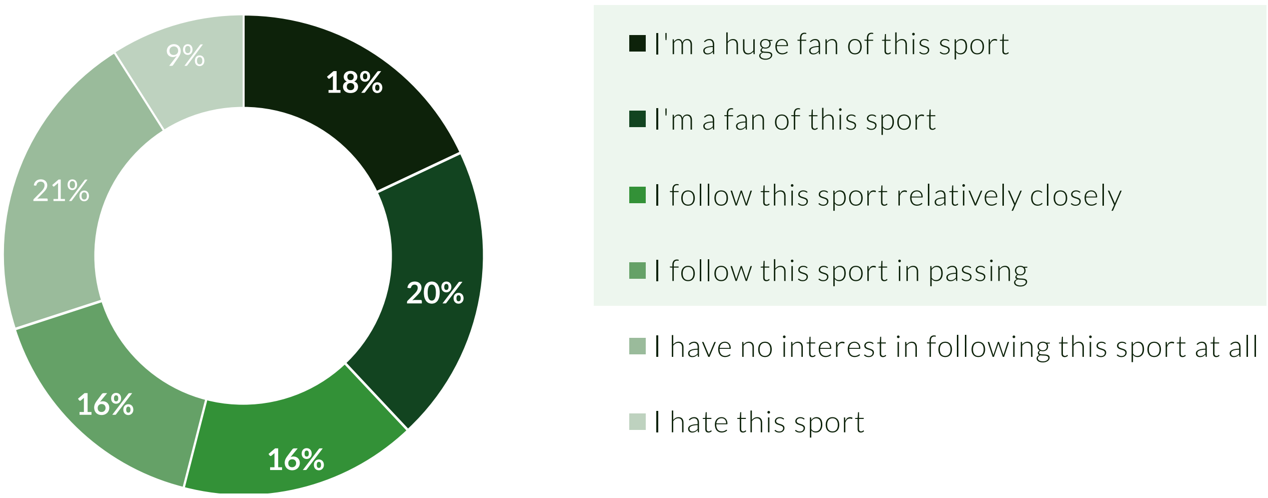
1. I'm a huge fan of this sport – following it is a big part of my life
2. I'm a fan of this sport – I like to keep up to date but don't follow it every day
3. I follow this sport relatively closely, but I wouldn't say I am a big fan
4. I follow this sport in passing, such as at international tournaments
5. I have no interest in this sport at all
6. I hate this sport

Separate options for 'huge fans' and 'fans' of football were included in the survey to draw out those for whom football is a major part of their life.

Part of the purpose of the study was to capture sentiments of lighter groups of fans (I follow this sport relatively closely and I follow this sport in passing), who make up 32% of respondents, and 46% when only considering respondents with an interest in football. These fan groups represent a significant opportunity for clubs, on account of new methods in attracting, marketing and engaging with fans of all types around the world.

Claimed interest in football

All respondents



Less than a third of people say they are outright 'football rejectors'. In the survey, there were two options for football rejection – disinterest vs active dislike – to better understand the core differences between these two groups and differentiate their barriers to football fandom. Both groups were directed to a shorter survey with a different set of questions (focusing on barriers, and other sports interests) of which more information can be found in section 2.2. These rejector groups are still of some interest to ECA, as they provide an opportunity to understand how barriers to football fandom might be mitigated in the future.

Our survey also isolated those who previously followed football but no longer do so, probing into claimed reasons for this change and which new sports (if any) have taken the space of football in their consumption.

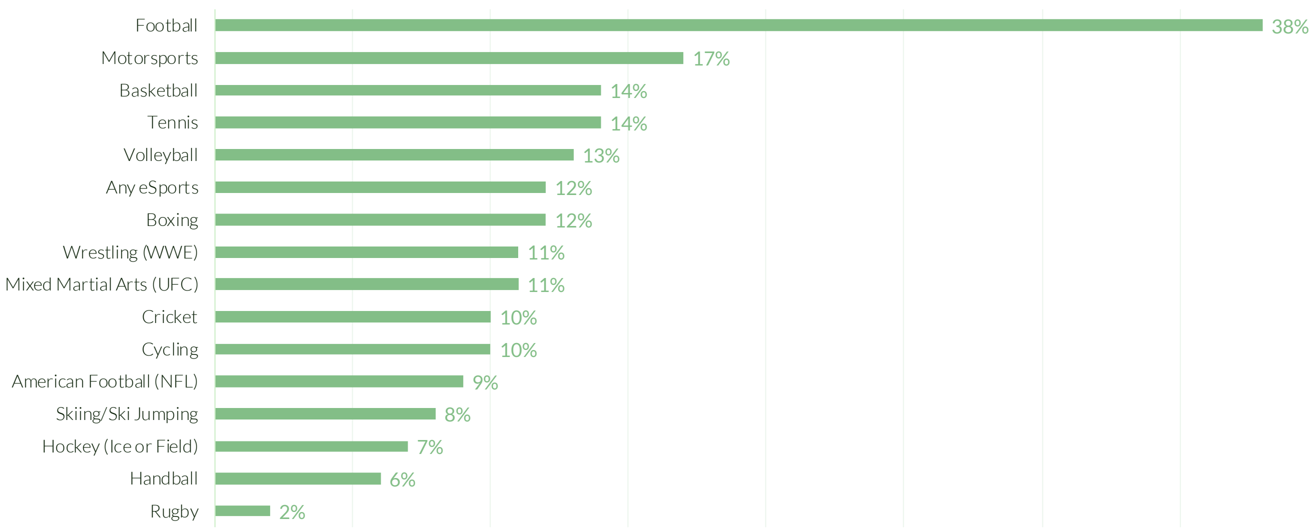
1.2.3

Football's position relative to other international sports

While the rest of this report outlines the changing nature of football fandom, it is important to note that football still holds a position of considerable strength around the world, maintaining its primacy as the most popular sport by some margin. Football has more than double the number of fans than any other sport across our surveyed markets, with motorsports, basketball and tennis all appearing comparatively niche relative to the level of global interest in football.

The proportion of 'fans' or 'huge fans' of each sport

All respondents, 8 – 64, with all markets weighted equally



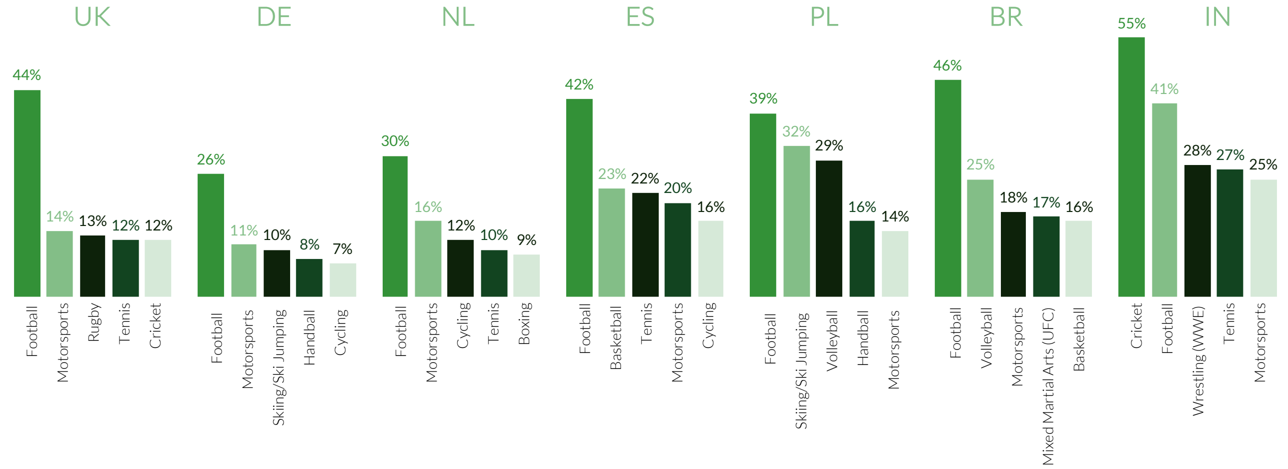
The data included here may differ from other available sources of football fandom on account of the following factors:

- Slightly different definitions of fandom (here we include those with a strong relationship with football)
- The age make-up of the sample (our data is based on 8-64 year olds)
- Which markets are included, and how they are weighted (we use an unweighted average across the seven markets named earlier in this report)

The top five sports in each market varies significantly, although football tops the list in all markets except India, where cricket is more popular. The relative position of other sports differs depending on the market, with football offering something unique versus other popular sports in all markets.

Top 5 sports in each market (fans/huge fans)

All respondents, 8 – 64, **by market**



The top five sports in each market varies significantly, although football tops the list in all markets except India, where cricket is more popular. The relative position of other sports differs depending on the market, with football offering something unique versus other popular sports in all markets.

The list of popular sports is more or less consistent across age groups, although those aged 8-24 are slightly more likely to say they are fans of boxing (16%), MMA (16%) and eSports (20%) when compared to the overall population.

1.3 Report structure

The rest of this report is structured as follows:

- **Chapter 2: Modern fandom – our new fan segmentation.** An overview of modern football fans, defining a new fan segmentation that enables ECA Member Clubs to benefit from a robust and up-to-date understanding of different fan types around the world

- **Chapter 3: Modern fandom mechanics**. A dissection of the different drivers that contribute to modern fandom, including different levels of affinity, engagement and football consumption patterns

- **Chapter 4: Implications for ECA and its member clubs.** Recommendations for clubs and next steps for ECA to consider in the future, as it builds out its capacity to attract and better understand modern football fandom

2 Modern fandom – our new fan segmentation

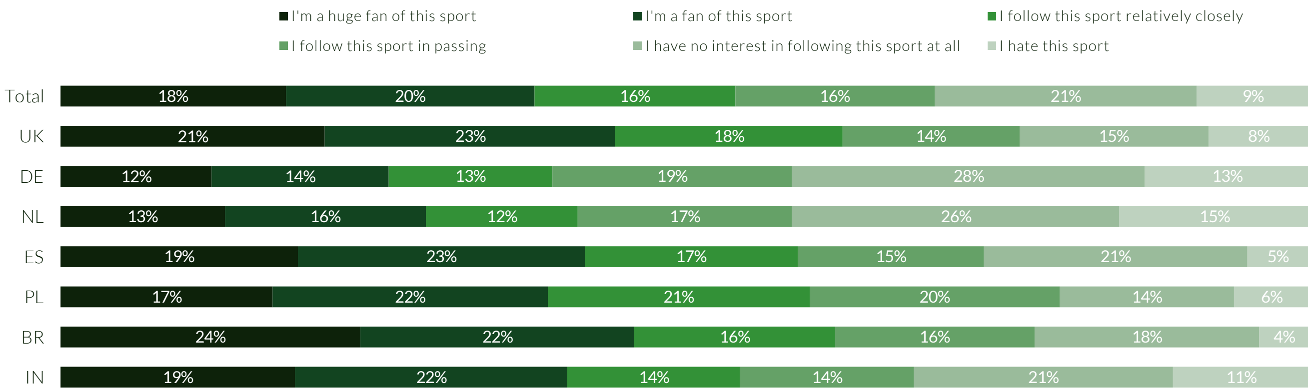
2.1 Levels of football fandom by market and demographic

This report defines football fans as those who identify as having any interest in the sport: from huge fans to those who follow the sport in passing. Among all survey respondents, 70% of people meet this fandom definition.

Poland, Brazil and the UK see the highest percentage of people who describe themselves as football fans, with 80%, 78% and 77% respectively. Conversely, Germany and the Netherlands are the markets that see the lowest proportion of football fans, with 59% of respondents aged 8-64 in both markets falling into this category.

Level of interest in football

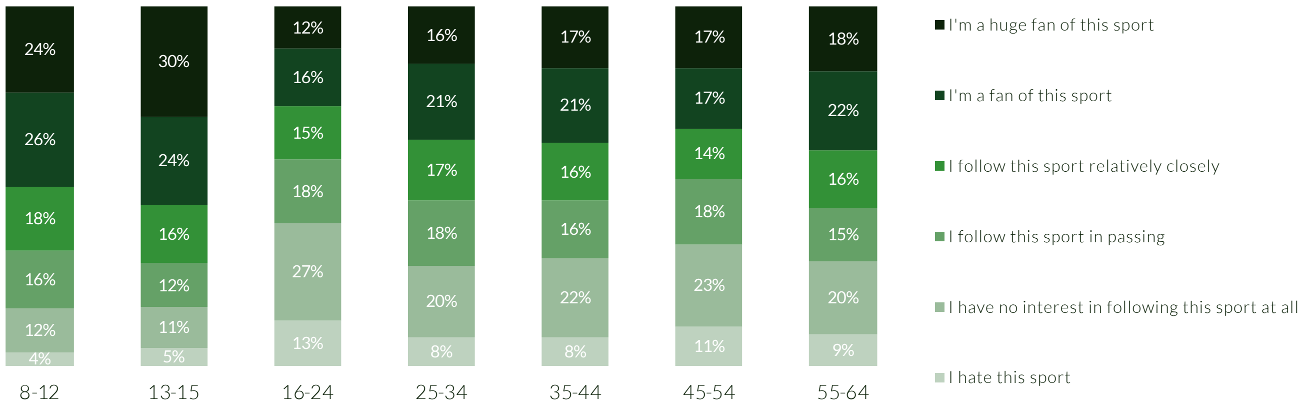
All respondents, **by market**



Around the world, football fandom peaks amongst children. Only one in six 8-15 year olds say that they either hate or have no interest in the sport, compared to over 50% of this group who say they are either a fan or huge fan.

Level of interest in football

All respondents, **by age**



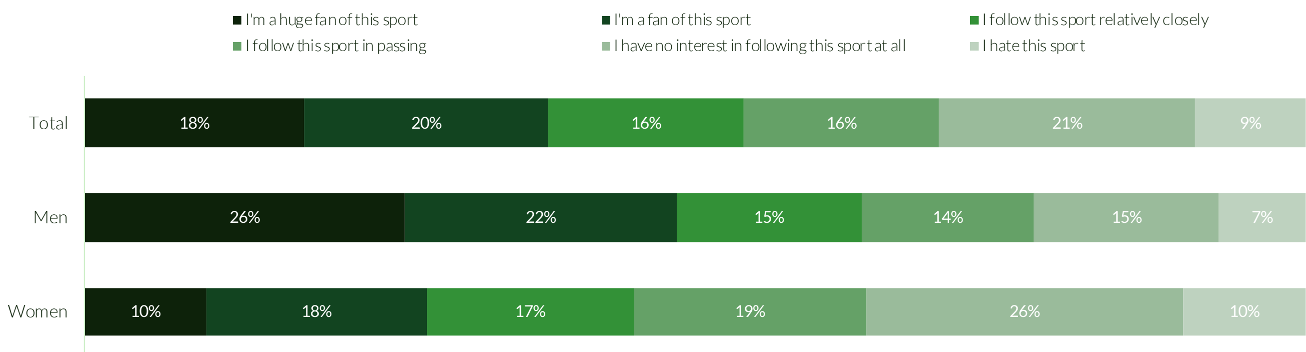
Interest in football decreases and is at its lowest among those aged 16-24, with two in five of this age group saying they either hate or have no interest in it (vs 28% who are fans or huge fans) – a finding that is consistent across all markets.

This age group is a challenge for many entertainment and leisure activity providers, given the breadth of competition for their time, and the life stage that they are in. For many, this is when they are first able to make their own decisions, and indeed spend their own disposable income on leisure activities, as well as being able to prioritise other ways of spending their time.

In terms of gender, football fandom skews significantly towards men across all age groups. 78% of men aged 8-64 claim to have at least a passing interest in football, with almost half claiming to either be a fan or a huge fan. Although these figures drop among women of the same age, the size of the opportunity is still significant – 64% claim to have at least a passing interest in football, and over a quarter are either fans or huge fans (28%).

Level of interest in football

All respondents, **by gender**



2.2 Profiling football rejectors

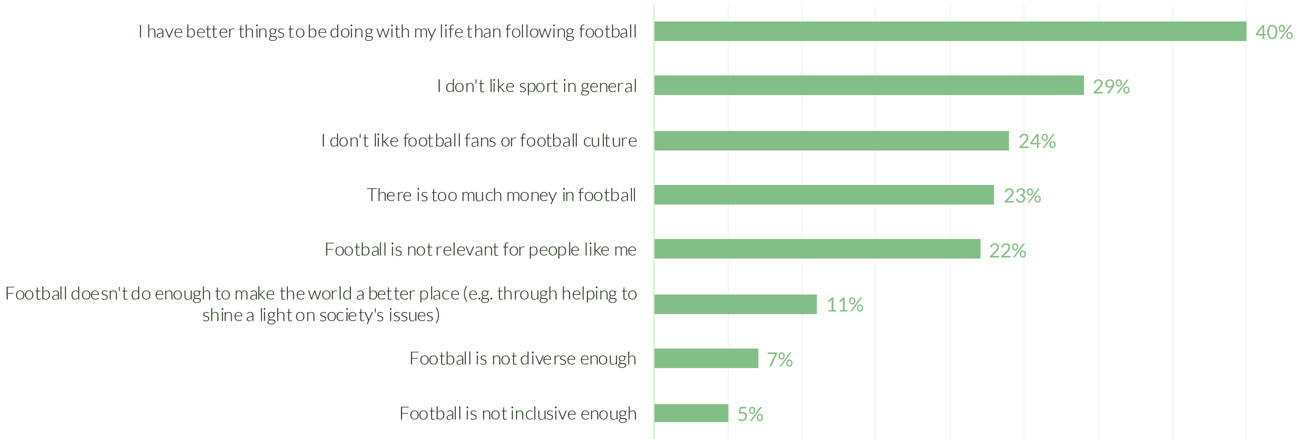
Although the survey focused on those with at least a passing level of interest in football, there were a small number of questions to football rejectors. This group was not a priority area for this project, however the initial questions asked can act as a starting point for future research. This project has uncovered some of the major barriers to football fandom among different age groups, as well as how interest in football has changed over time.

Of the 30% of respondents who have no interest in football, the majority (69%) say that they have never been interested. 40% of those who never had in interest in football say they have better things to do with their lives than follow football, with between a quarter and a third saying they don't like sport in general (29%).

More pertinently, nearly a quarter of this life-long football rejector group (24%) say they did not like football fans or football culture, while 11% say a key reason for not liking football is it doesn't do enough to make the world a better place. This group represents the hardest to reach for all clubs and football organisations, given their lack of interest in football currently, and their lack of engagement in the past.

Reasons for never having had an interest in football

All respondents who have never had an interest in football, 13+

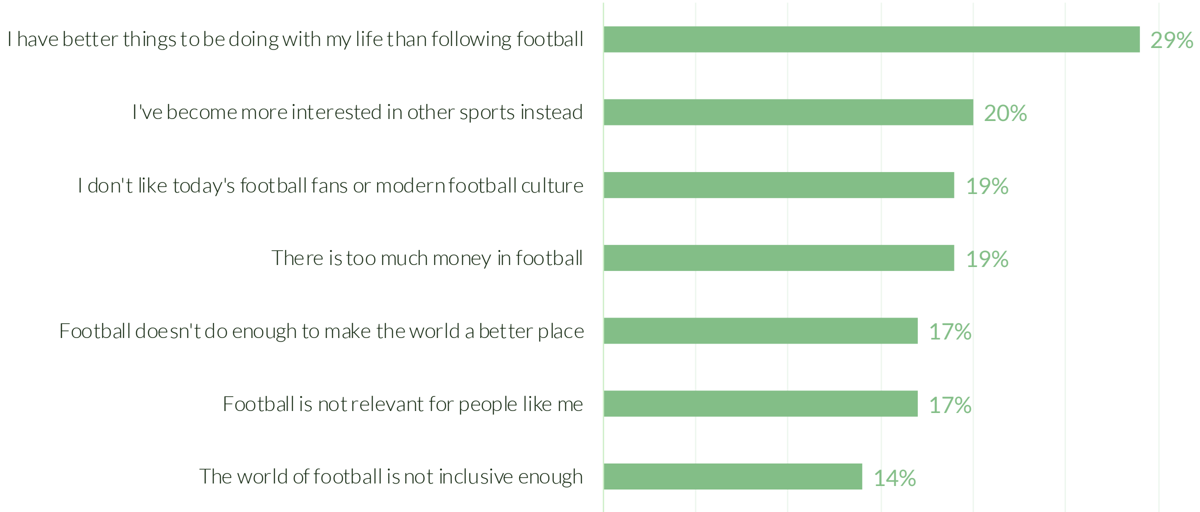


These barriers are consistent across markets but vary slightly by age group, with older demographics (those aged 45-64) more likely to say there is too much money in football (31% vs the average of 23%), and that they don't like football fans or football culture (30% vs the average of 24%). Younger football rejectors (those aged 13-24) are more likely to say football isn't diverse enough (12% vs 7%) or inclusive enough (7% vs 5%). The biggest reason given by 8-12 year olds for not liking football is 'because it is boring' (32%), followed by enjoying other sports instead (25%).

The barriers to football fandom are similar among people who have previously followed the sport but no longer do so. This group highlights a key opportunity for further research, specifically targeting ex-football fans and diving deeper into their new behaviours, as well as the triggers that prompted them to move away from football. For now, the focus remains with current football fans, including techniques to maintain and grow engagement.

Reasons for not having an interest in football anymore

All respondents who used to have an interest in football **but no longer do so**, 13+



Almost a third of this group (29%) say that they now have better things to be doing with their lives than follow football, while 17% say football doesn't do enough to make the world a better place.

Following other sports is a major reason for decreased engagement in football among those who have moved away from football (20% stated this reason). This cohort tend to follow cricket, motorsports, and basketball instead. These people claim to have moved away from football and towards another sport for a number of reasons, ranging from football being less interesting than the sports they now follow (42%), to it being seen to be easier to follow other sports (24%).

2.3 Identifying the new fan segments

Our segmentation focuses on those with at least a passing interest in football – all football rejectors were removed from the analysis. Our approach provides an up to date and holistic look at what it means to be a football fan today, encompassing different behaviours and attitudes.

2.3.1

Approach combines frequency of engagement with depth of interest

Using standard segmentation analysis techniques, we explored a range of potential inputs to identify distinct groups of football fans, exploring questions around football behaviours, club engagement, competition followership, and the needs fulfilled by football.

Following exploratory analysis, we created a segmentation approach that focused on respondents' answers in two question areas: their frequency of football engagement, and the 'intellectual engagement' they have with the sport – i.e. the depth that people go into to follow the sport whether highlights, full matches, memes, in-depth analysis etc. Other attitudinal factors (e.g. club vs national team football preference) also fed into our model.

Inputs

Frequency of engagement

How often each fan engages with football in a variety of ways (e.g. watching, playing, reading etc.)

Depth of football following

Attitudes towards following football, including depth of interest (e.g. match or 'spectacle' focus, club or national team preference etc.)

Outputs

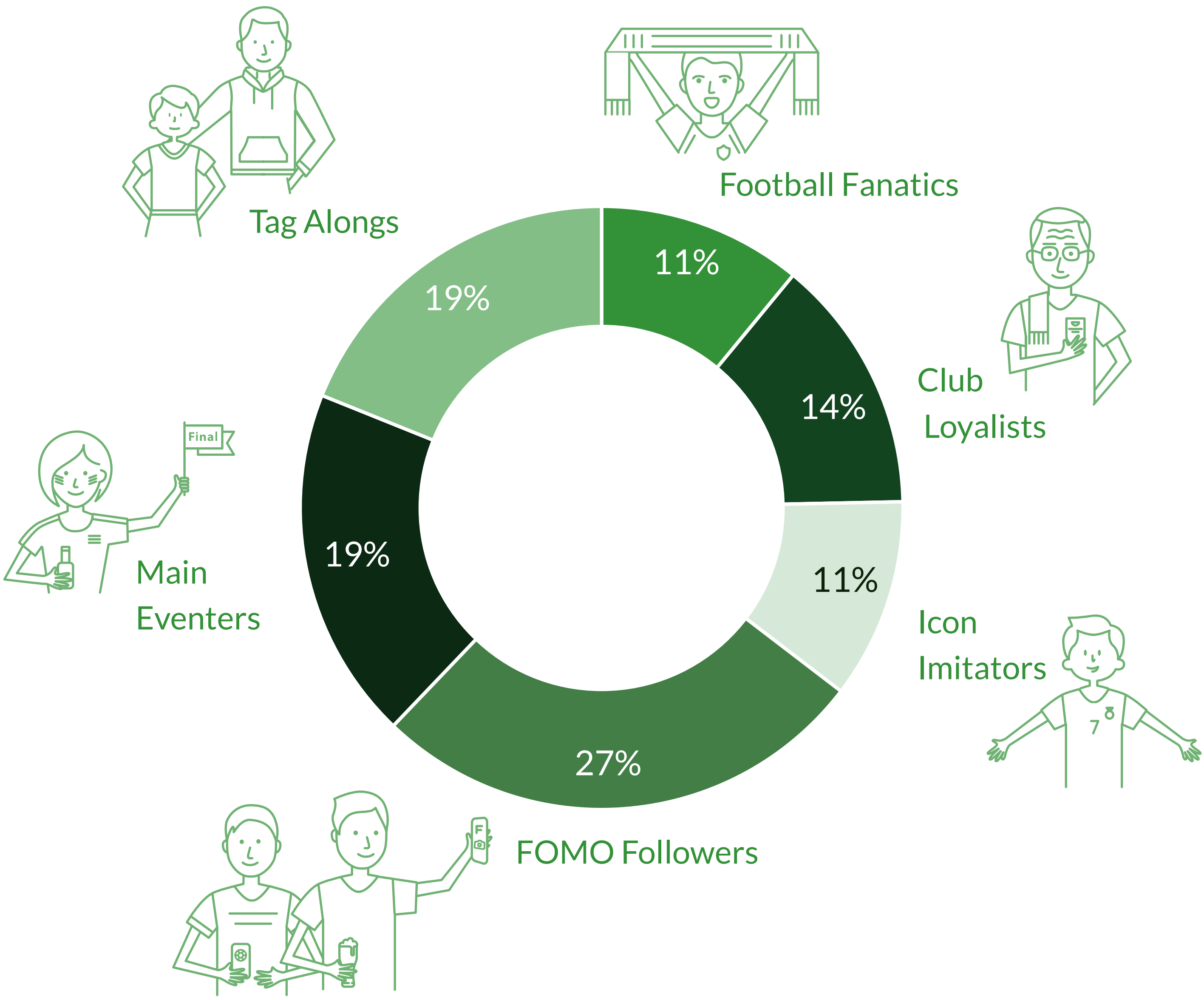
Profiling

Each segment was then analysed against all other survey questions, including consumption behaviours, needs met, clubs followed etc.

2.3.2

This approach separated the football fanbase into six distinct groups

The segmentation resulted in six distinct fan groups, which were categorised by their primary routes into the sport. The segments were built using a range of data points observed to follow similar patterns within each group, helping to pull apart each type of fan. Being included in one segment did not preclude them from having an interest in football that went beyond their apparent primary route into the sport – but rather proved to be a way of differentiating fans with otherwise similar characteristics. No single data point was used to categorise a respondent into any of the six distinct segments, but rather a combination of observed behaviours and attitudes.



Segment characteristics

(% in brackets refer to the size of the segment in European markets only)

FOOTBALL FANATICS
11%

FOOTBALL FOR... THE GAME:
- Follow football in its entirety, with strong emotional engagement – football provides a sense of community which is key to their enjoyment
- Slightly younger than average (37% are under 35), and the most male group (69%)
- Follow a range of sports, and highly engaged with football
- Prefer to go to the stadium to really experience this feeling of togetherness
- Attached to their club but engage widely beyond this, including lower league football

CLUB LOYALISTS
14%

FOOTBALL FOR... THEIR CLUB:
- Oldest segment (70% 35+) and predominantly male (66%)
- Highly engaged, long-term football fans
- Find football interesting/entertaining and follow their club closely
- Emotionally invested in their club, which helps provide their identity
- Watch football regularly and keep fully up to date with news

ICON IMITATORS
11%

FOOTBALL FOR... THE PLAYER:
- Youngest segment (53% 13-34) and 57% male
- Moderate to strong football interest, which is increasing
- Interest in football because they play regularly – generally prefer playing to watching
- Follow specific players and find them relatable
- Not as competition focussed, but enjoy big games featuring the world's biggest and best footballers

FOMO* FOLLOWERS
*'Fear of missing out'

27%

FOOTBALL FOR... THEIR FRIENDS:
- Also relatively young (52% under 35), predominantly male segment (54%)
- Moderate fans – claim to follow the sport closely, but don't identify as "huge" fans
- Follow football for social currency – something to talk about
- Frequently engage with football (news, illegal streaming, sharing stories/memes) but less emotionally engaged
- Prefer to follow the big teams, and prefer European football over domestic for the perceived higher quality of entertainment that it offers

MAIN EVENTERS
19%

FOOTBALL FOR... THE OCCASION:
- Typically older (64% over 35) and slightly more likely to be female (52%)
- Moderate fans – keep up to date with news and watch on TV
- Low engagement frequency which increases around big matches / tournaments
- Less bothered about the result, more interested in the event

TAG ALONGS
19%

FOOTBALL FOR... THEIR LOVED ONES:
- Typically older segment (65% over 35) and more likely to be female (59%)
- Lightest football fans, with low emotional and intellectual engagement
- Interest prompted by friends/family, or national team performance
- Despite lower football interest, most have heard of UCL and UEL and generally become more engaged around big tournaments

FOMO Followers - those who follow football as a form of social currency and as something to talk about - make up the largest group in our segmentation at just over a quarter of all fans. This group of fans use football and its surrounding culture as a conversation point with friends (both digitally and in person), and although they exhibit frequent football behaviours, the depth of their feeling towards the sport is low relative to other fan segments.

FOMO Followers are more likely than most to see football as substitutional – and football's easy access and presence in the mainstream are two driving factors behind their interest. This is a sizable group, and not one to write off – this group is the most likely to engage with clubs via social media and other digital platforms, which they do regularly.

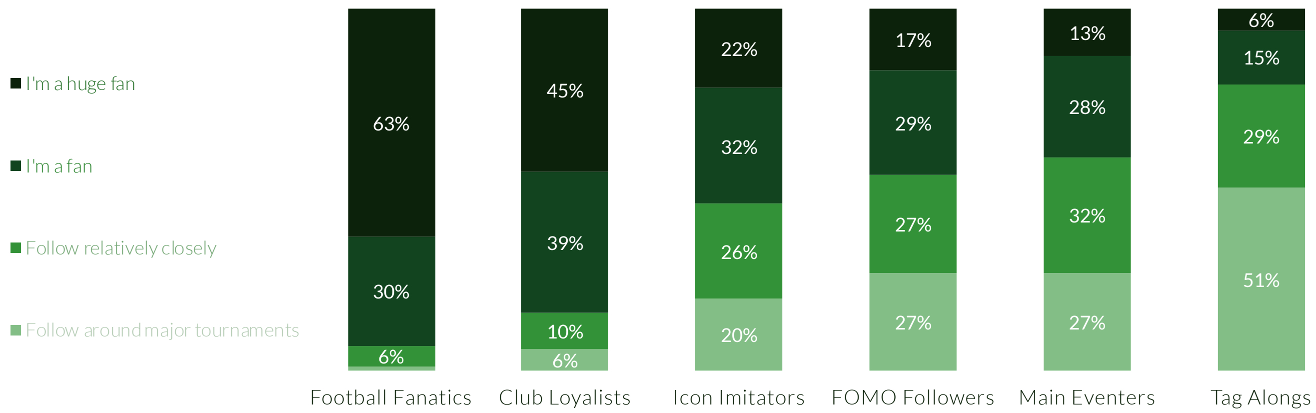
The two most engaged groups, Football Fanatics and Club Loyalists, make up 25% of all football fans collectively, while Icon Imitators (who predominantly follow football for the players themselves) make up a further 11%. Football Fanatics and Club Loyalists show the most traditional behaviours (e.g. watching matches on TV, listening to matches on the radio) though demonstrate a decent level of digital engagement too (be that general football coverage, or following specific clubs and players).

Main Eventers and Tag Alongs – those with a more detached football habit - make up 38% of football fans. While this group could be seen as a lower priority for clubs and competitions, their engagement with football is still enough for them to declare themselves as football fans. Their football behaviours are unlikely to yield significant financial return. However, they could be targeted through the correct communications and marketing, particularly around major football events and stories that typically bring larger audiences. These groups can also provide an interesting secondary market for clubs and retailers, as this group is likely to purchase for others with a higher engagement with the sport.

Despite the different engagement with football across these segments, it is important to note that the majority of fans in each segment (with the exception of Tag Alongs), claim to follow football at least 'relatively closely'. Even among Tag Alongs, this figure falls to just below half of respondents.

Level of interest in football

All respondents interested in football, **by segment**



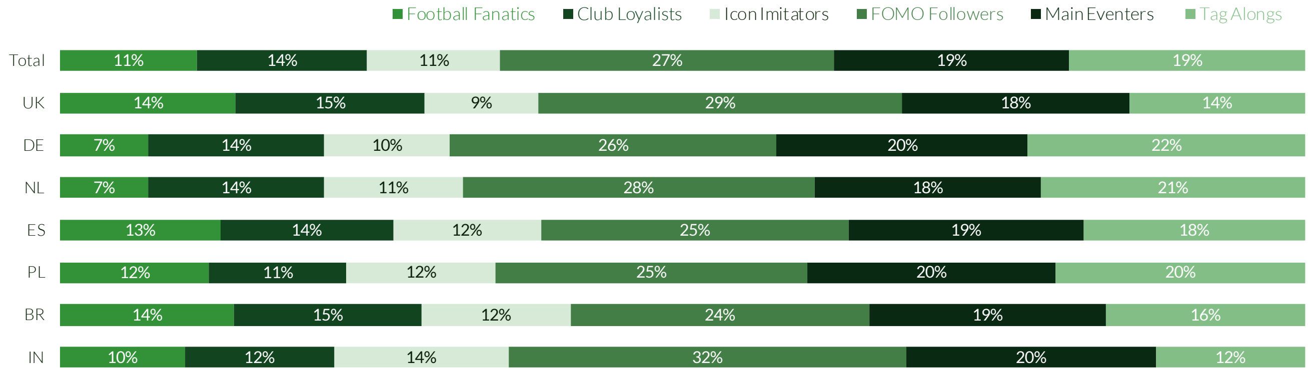
2.3.3

The size of the segments varies significantly by market

The proportion of football fans falling into each segment naturally differs by market, with Brazil and the UK having the largest proportion of both Football Fanatics and Club Loyalists, and Germany, Poland and the Netherlands both seeing comparatively high proportions of Main Eventers or Tag Alongs. The biggest fan segment in each market however is the FOMO followers – consistently making up around one quarter of football fans.

Size of each fan segment in each market

All respondents interested in football, **by market**



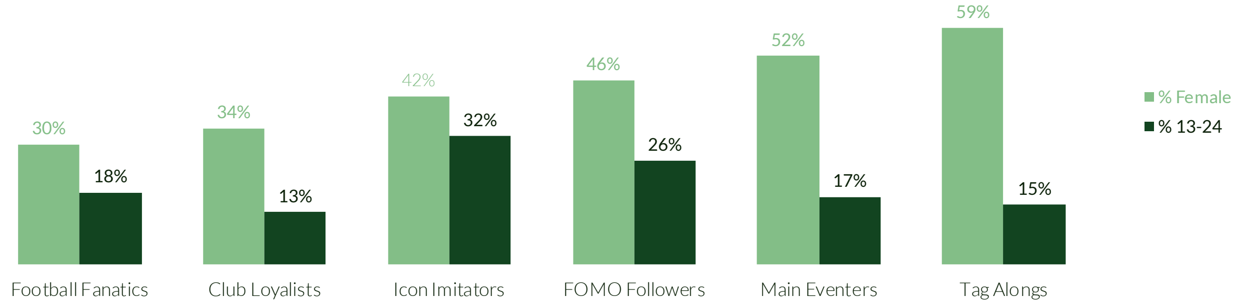
2.3.4

The six fan segments have different demographic profiles

Each segment has a different demographic make-up. For example, younger football fans (those aged between 13 and 24) make up a significantly larger proportion of the Icon Imitator and FOMO Follower segments, while female football fans make up over half of the fans identified as Main Eventers or Tag Alongs.

Proportion of each segment who are female or aged 13-24

All respondents interested in football



Due to the condensed survey for 8-12 year olds, this age group was not included in the segmentation analysis, but analysis of their survey responses indicated they have a strong affinity with players (often in helping to improve their own footballing skills), and more modern forms of football consumption e.g. social media, games, and online.

2.4 The new segments in detail

Each of the six fan groups we identified indicate a different type of football engagement, as well as different opinions and preferences for how football feeds into their lives. Each group sees similar patterns of behaviours within that group against a range of questions, as well as distinct characteristics and leanings versus other segments.

2.4.1

Football Fanatics follow football **for the game**

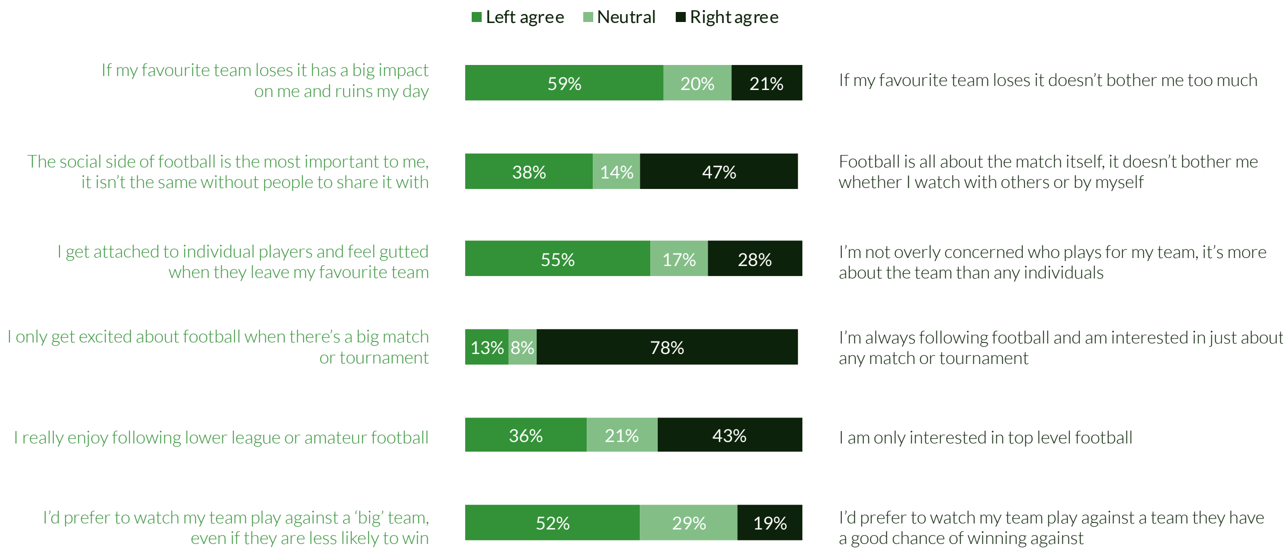
Football Fanatics - the most engaged group - follow football in its entirety. They claim to engage with football almost constantly and while their team plays a big part of their fandom, they are also likely to take an interest in the sport regardless of whether their team is involved or not.

Almost half of this group (47%) say football is all about the match itself, rather than the social associations that come with watching football. Over three quarters (78%) say they are always following football, and that they are interested in almost all kinds of matches and competitions.

Their relationship with their favorite club is strong – 59% say that their team losing would have a significant impact on their day – but over half say they are also attached to individual players (55%).

Levels of emotional engagement with football

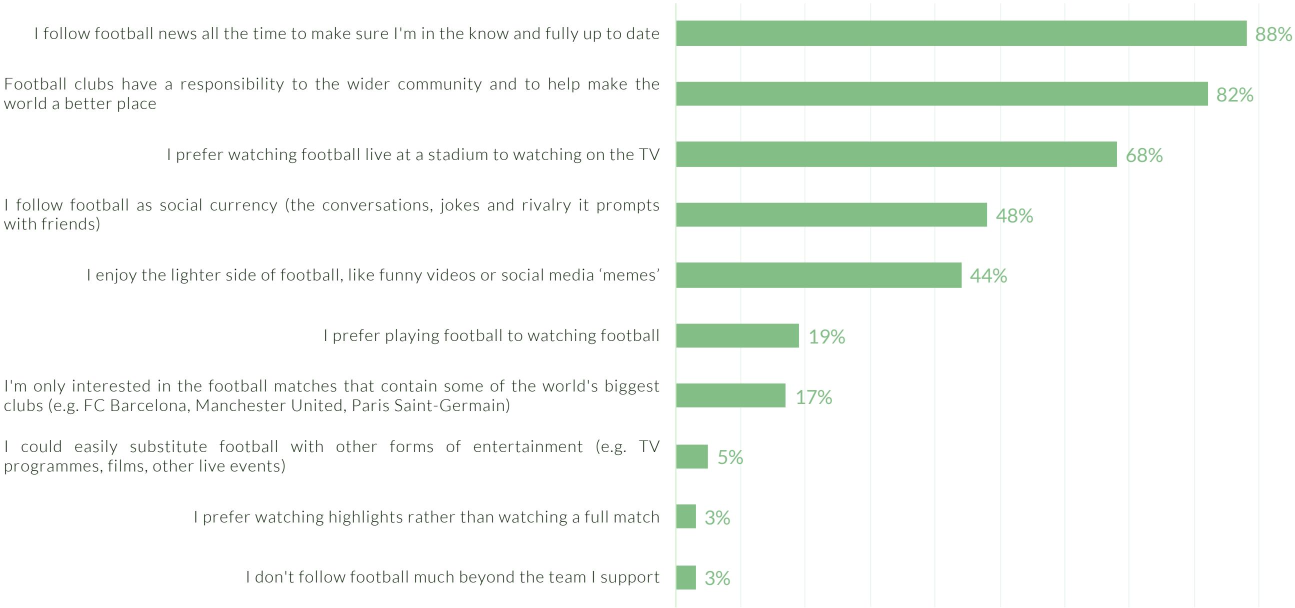
All **Football Fanatics**



This group of fans have high expectations for clubs when it comes to helping the wider community. Over 80% say clubs should help to make the world a better place – a significantly higher proportion than any other segment. Only 3% of this group say they do not follow football beyond the team they support, highlighting the breadth of their engagement.

Proportion who agree with each statement about football engagement

All **Football Fanatics**



2.4.2

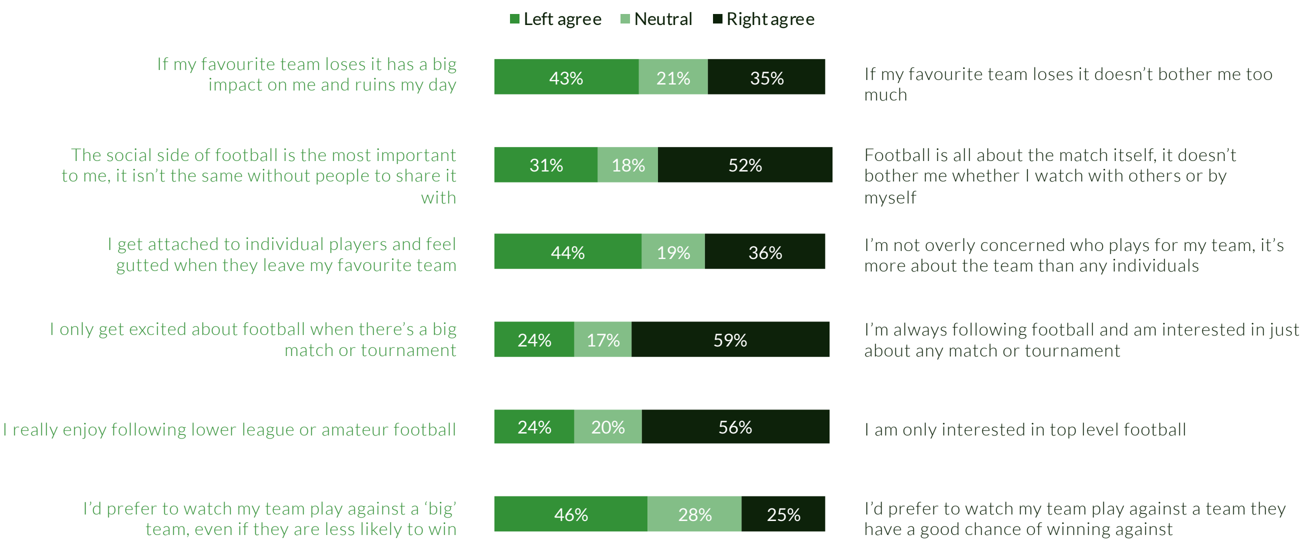
Club Loyalists follow football **for their club**

Club Loyalists share many of the characteristics of Football Fanatics but tend to have a less holistic interest in the sport, and rather are proportionately more likely to engage only with their club. They also have a slightly lower emotional attachment in general with football, though this remains stronger than the other four segments we identified.

They are more likely to only be interested in higher levels of football, with 56% saying so compared with 24% who say they enjoy lower league or amateur football.

Levels of emotional engagement with football

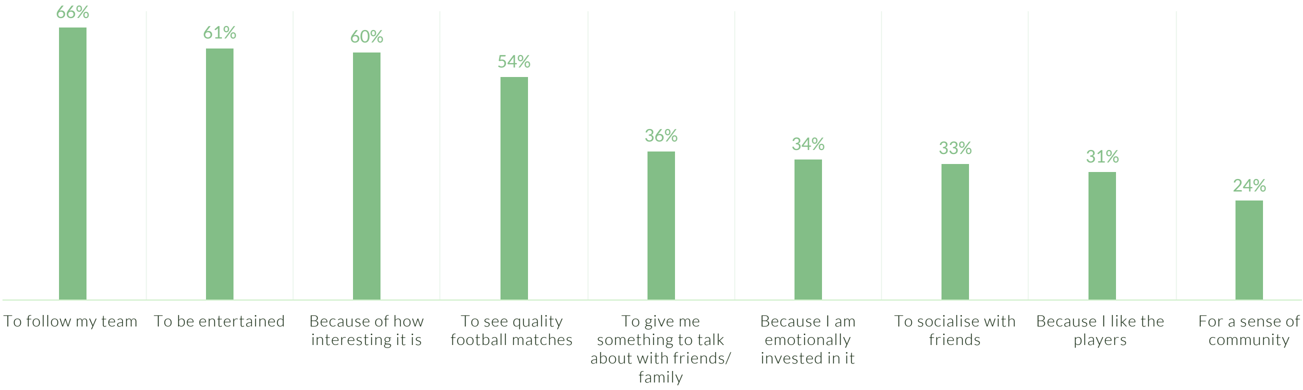
All **Club Loyalists**



For this group, the biggest single reason for following football is to follow their team. Outside of this need, 'quality matches' comes through strongly, while a third say that they are emotionally engaged with the sport overall (only Football Fanatics had a higher figure for this measure at 52%). A quarter of this group say they follow football for a sense of community – higher than all other segments other than Football Fanatics.

Reasons given for following football in general

All **Club Loyalists**



2.4.3

Icon Imitators follow football **for the player**

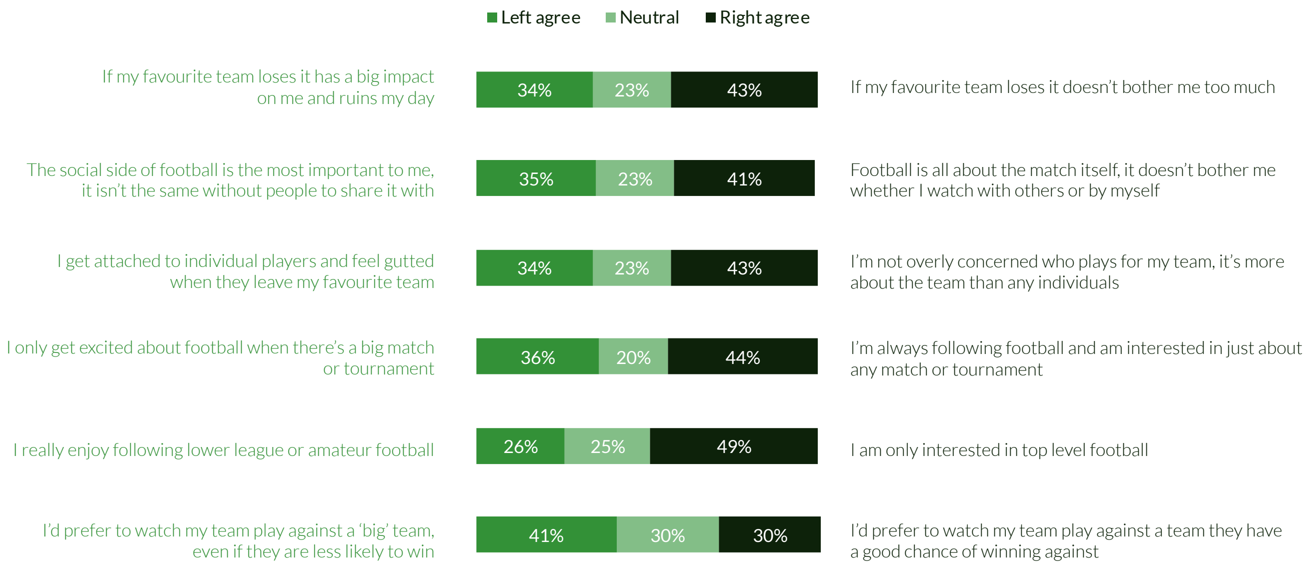
This group of fans have a number of characteristics that revolve around players – either in that they actively play football themselves (and therefore watch football to help with their own development), or because they also follow individual players as well as clubs. While the other factors of fandom are still important to this group, players are comparatively of far higher interest than they are for any other segment. Many in this group follow specific teams, but also keep an eye on their favourite player, regardless of where they play.

80% of Icon Imitators say they play football at least casually, higher than any other group. Participation in football is a driver in overall football fandom, and in that sense part of their overall engagement with football takes place at a grassroots (rather than elite) level.

While a relatively smaller proportion of this group agree they "get attached to individual players and feel gutted when they leave my favourite team", this is largely because club following and player following can go hand in hand – these fans can support a team, and like a player outside of that team, at the same time. Some go as far as to only support specific clubs when a certain player plays for them, but this support is fleeting, and club affinity can change depending on where an individual player (or players) go. They may also use players as a way of highlighting the support of a team (through having a favourite player, and perhaps getting that player's name on the back of a shirt), but may move on to have a new favourite player if the old one is transferred away.

Levels of emotional engagement with football

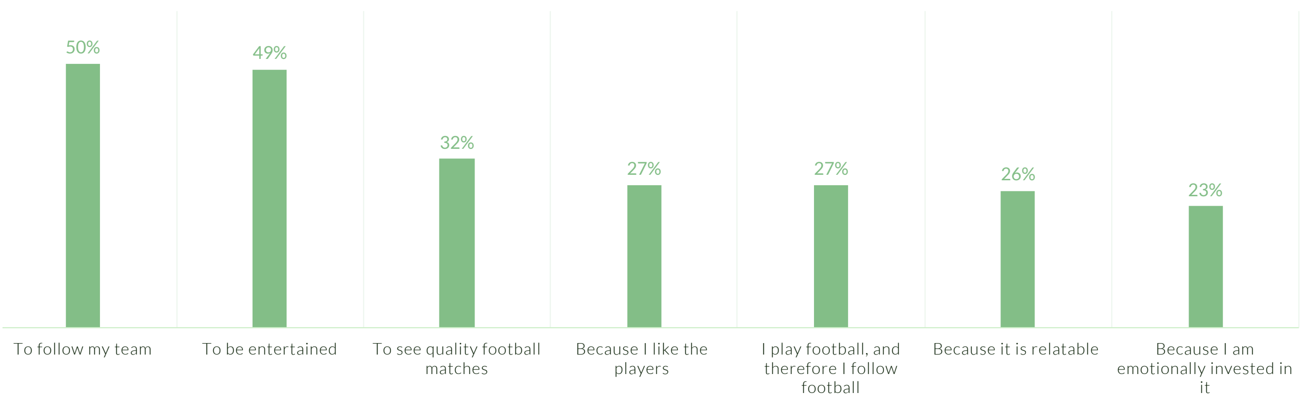
All **Icon Imitators**



While the main reason for football following among this group is still team-based, this is far less dominant versus other reasons when compared to both the Football Fanatics or Club Loyalist groups. Indeed, this group are proportionately more likely to say they follow football 'because they like the players' (27%), or because they play football themselves. A similar percentage (26%) say they follow football because it is relatable, learning when watching players.

Reasons given for following football in general

All **Icon Imitators**



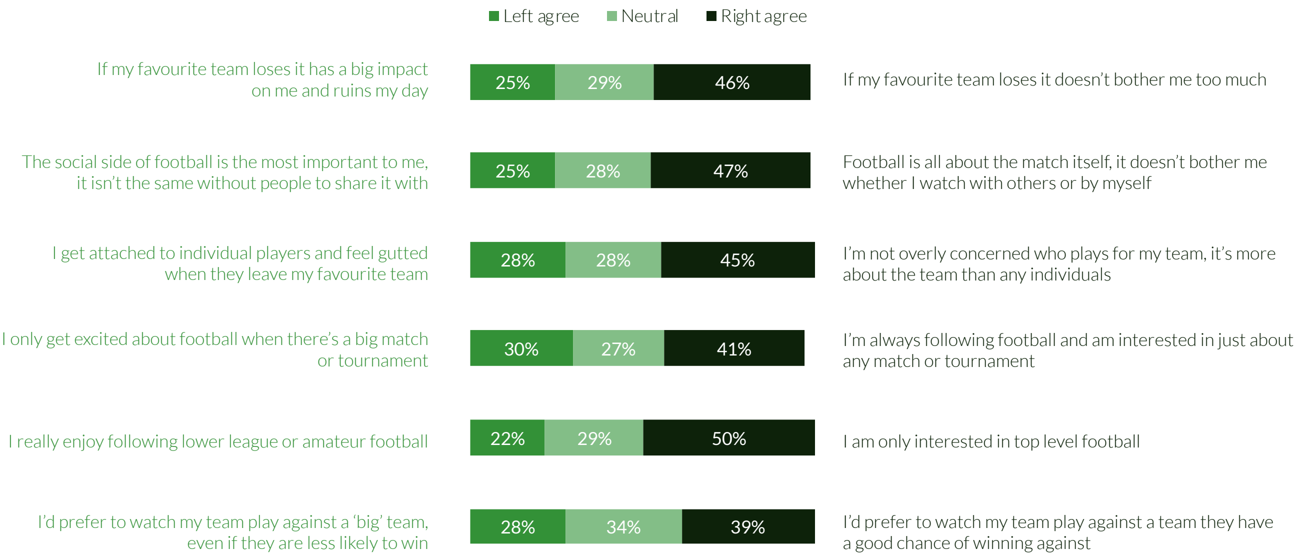
2.4.4

FOMO Followers follow football for their friends

FOMO Followers like the social aspects of football. Above all, they enjoy the lighter side of football and a large proportion feel they could replace football with other forms of entertainment. They are less concerned by the performance of their team, or if certain players leave their team.

Levels of emotional engagement with football

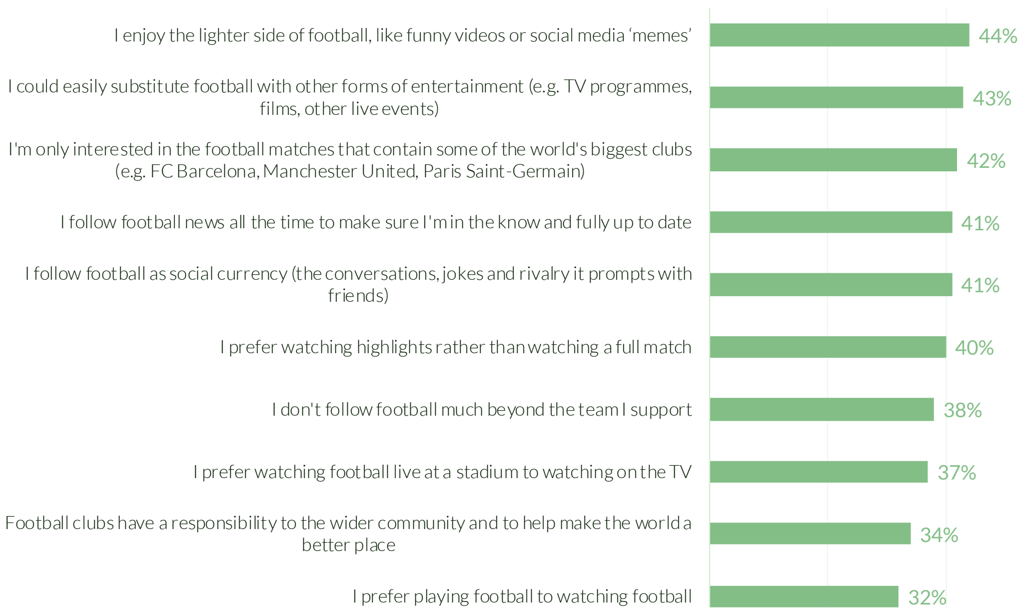
All **FOMO Followers**



At 44% agreement, the proportion of this group who say they enjoy the lighter side of football is higher than among any other segment, while the proportion that disagree (24%) is well below the equivalent figures elsewhere. They are also among the most likely to say that football is sub-stitutional (43%), only falling behind the Tag Along group (77%).

Proportion who agree with each statement about football engagement

All **FOMO Followers**



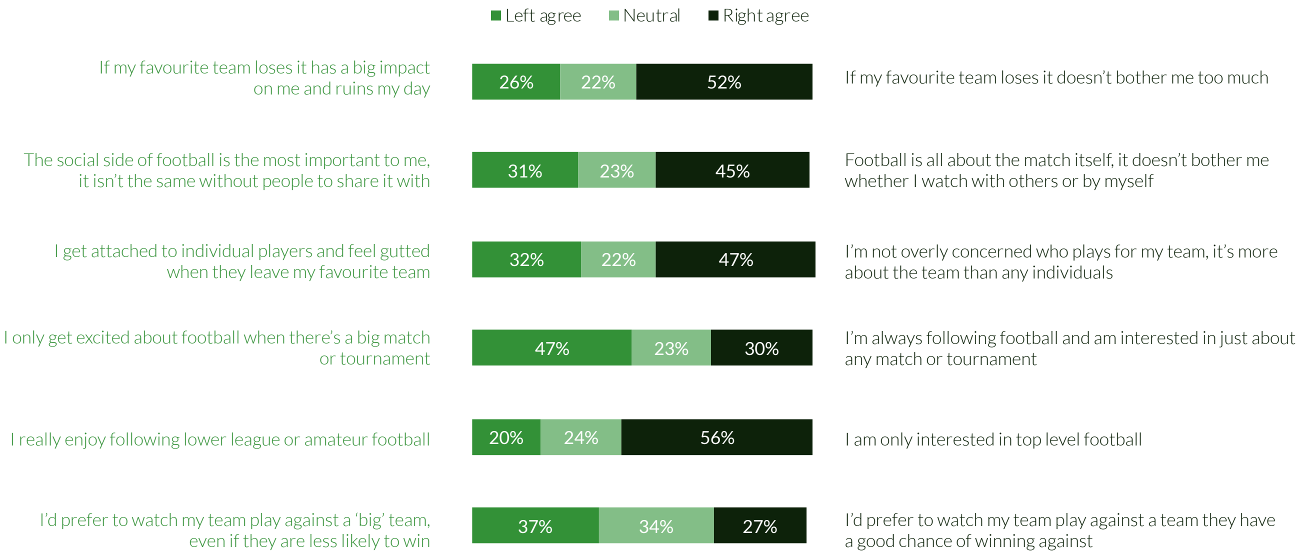
2.4.5

Main Eventers follow football for the occasion

Main Eventers mainly follow football to be entertained and are less concerned with who plays for their team or if their team loses. Almost half only get excited about football when there is a big match or tournament and 56% of this group say they are only interested in top level football.

Levels of emotional engagement with football

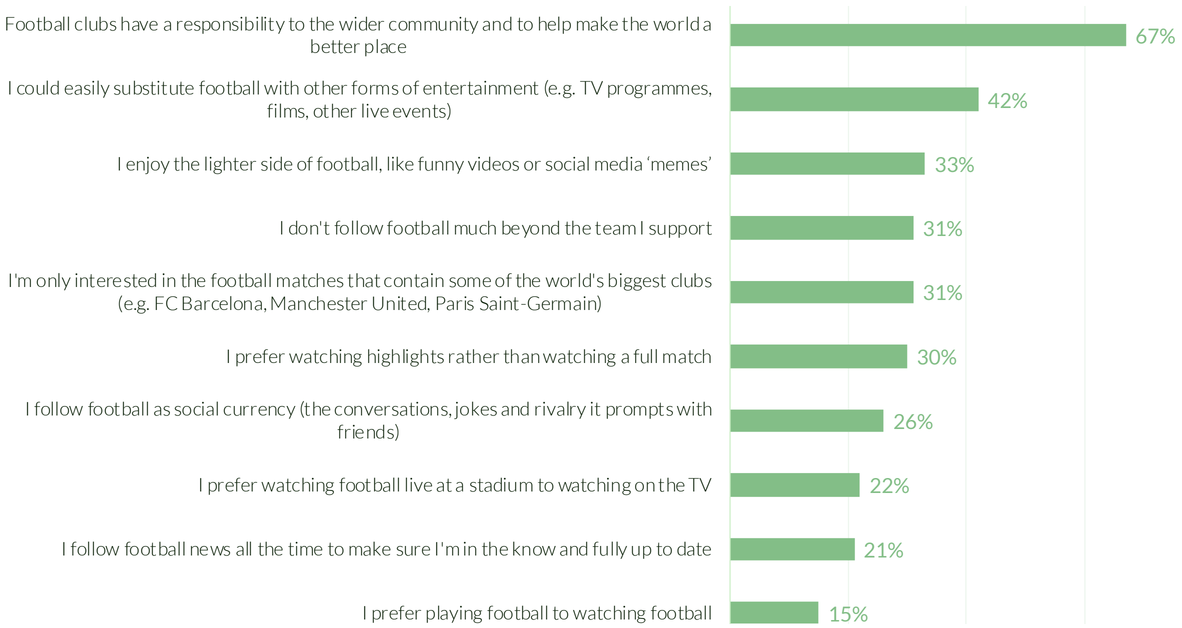
All **Main Eventers**



Like FOMO Followers, this group is more likely to see football as substitutional. At 67%, they are the second most likely group to think that football clubs have a responsibility to the wider community in helping make the world a better place.

Proportion who agree with each statement about football engagement

All **Main Eventers**



2.4.6

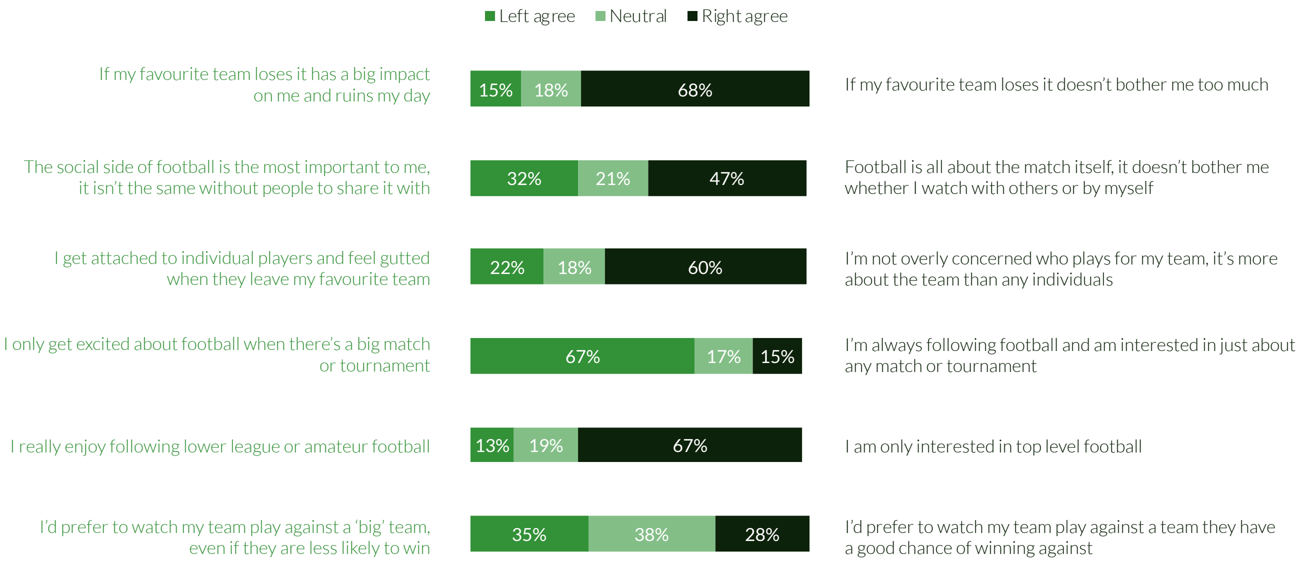
Tag Alongs follow football for their loved ones

More Tag Alongs say they follow football because of their partner or family members than any other group. They are less invested in football – the vast majority only get excited about football if there's a big match or tournament going on and they aren't too bothered if their team loses. Over three quarters of Tag Alongs could easily substitute football with any other form of entertainment.

This group do not have strong associations with their club – only 15% say that their team losing has a big impact on their day. While 47% say that it doesn't bother them whether they watch matches alone or with people, this is because they're not bothered about watching games regardless – if it's on, it's a background activity often for the benefit of others.

Levels of emotional engagement with football

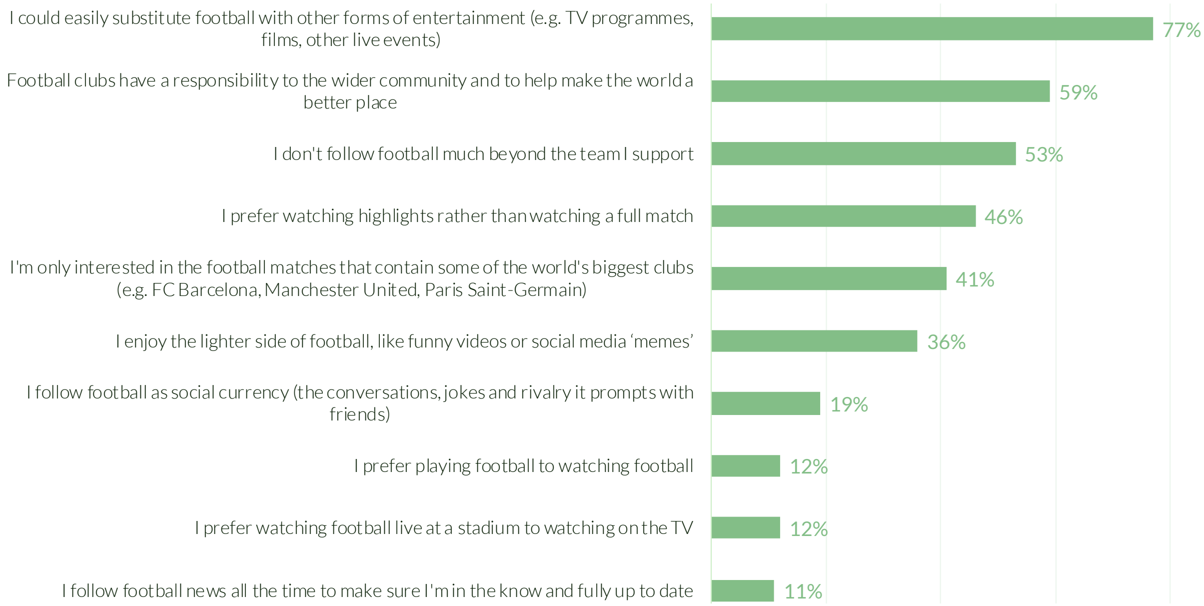
All **Tag Alongs**



This group is the least likely to follow football beyond the team they, or a family member, supports. They are also most open to watching football highlights rather than full matches; this is representative of their substitutional and passive relationship with football.

Proportion who agree with each statement about football engagement

All **Tag Alongs**



3 Modern fandom mechanics

Alongside the new fan classification and segmentation approach, this study enables a deeper understanding of football fandom across markets and demographics. This section of the report uncovers this comparative insight on a range of topics, primarily related to:

1. **Fans' relationships with clubs**
2. **Emotional engagement with football overall**
3. **New ways to engage with the sport**

Each topic is analysed firstly overall, drawing general statements about the nature of modern fandom, before looking at any key differences by market, demographic and (where relevant) by segment.

3.1 **Club and player affinity** – moving away from single club support?

3.1.1

Why clubs are supported

Reasons for supporting a club can vary – playing style, values, and success of the club all appear to be important drivers for many fans. Whilst club success is an important factor for over a quarter (28%), football fans are often looking for a connection with their club, including their playing style (33%), values (30%), location (25%), or because people close to them also support the team (parents 26%, friends 20%). Individual players are least likely to be driving club choice among fans generally, though prove more important for the Icon Imitator group.

Reasons for supporting a club

All who support a club

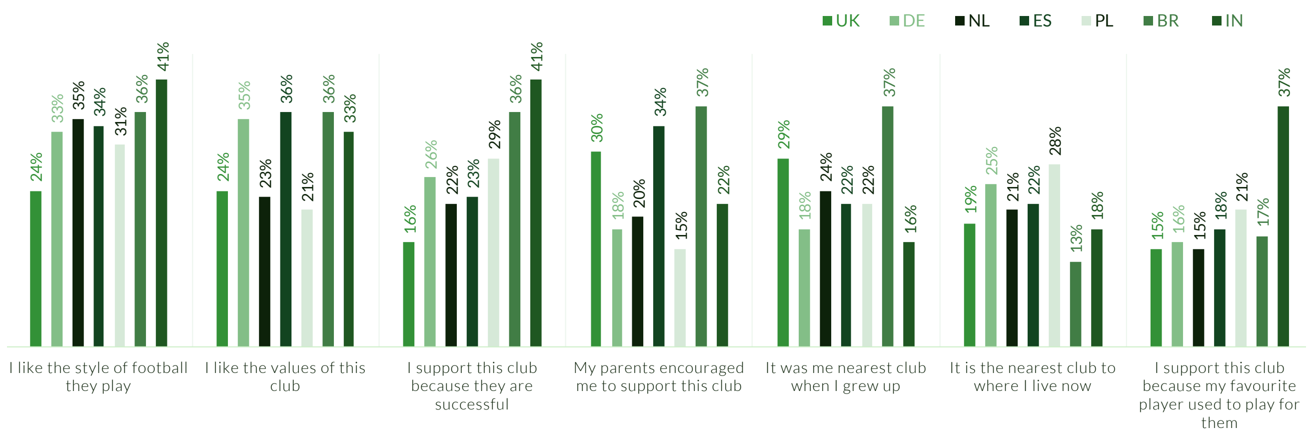
1. I like the style of football they play – 33%
2. I like the values of this club – 30%
3. I support this club because they are successful – 28%
4. My parents encouraged me to support this club – 26%
5. It was the nearest club when I grew up – 25%
6. It is the nearest club to where I live now – 20%
7. My friends all support this club – 20%
8. I support this club because my favourite player used to play for them – 20%

Fans in India are more likely to be attracted to a football club for its style of play (41%), level of success (41%) and specific players (37%) when compared to football fans from the other markets.

Club choice is most likely to be inherited from parents in the UK (30%), Spain (34%) and Brazil (37%). Fans in Brazil are also more likely to support a club local to where they grew up (37%). Being successful (16%) is least likely to be a reason for UK fans versus other markets, and peaks in the two non-European countries in our survey.

Reasons for supporting main club

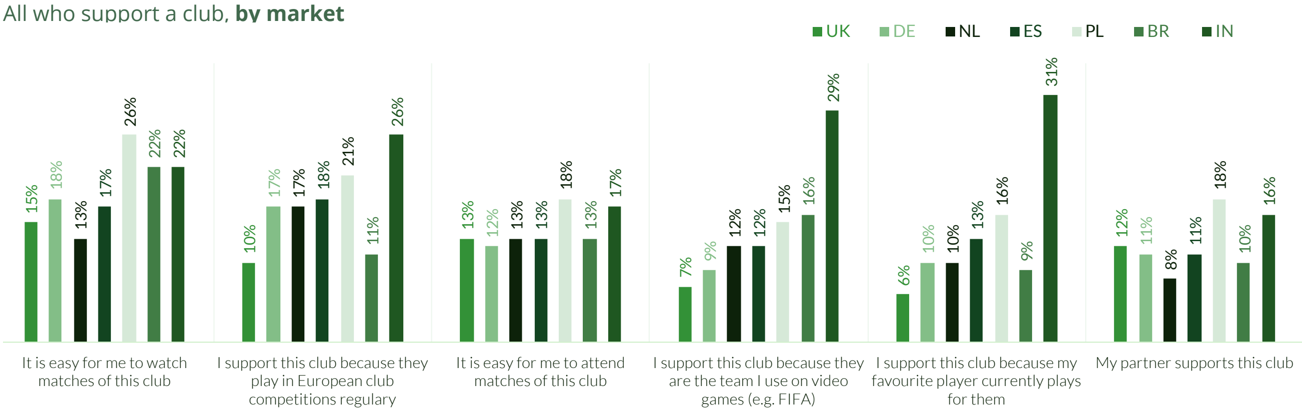
All who support a club, **by market**



The profile of a club is important to fans in India; they are most likely to support a club that appears on video games (29%) or regularly plays in European competitions (26%).

Reasons for supporting main club

All who support a club, **by market**



Reasons for club fandom also sees interesting differences by age. For the youngest group in our sample, those aged 8-12, a club's success is the main reason for support, with 44% of this group agreeing. As is expected, the importance of parents is also highest amongst this group and cited as the second biggest reason for club support (37%). A third of football fans aged 8-12 say that one of the reasons they support their club is because it is the team they use in video games.

Among all other age brackets, the style of football is the main reason for team support, followed by a club's values. The importance of club proximity increases with age, with 31% of those aged 55-64 saying that they support a club because it was the closest to where they grew up (compared to just 22% of 16-24s). This finding points again to the ease with which younger generations can access brands from around the world.

There are several factors more important to younger fans than older ones. Players, ease of watching games, and success are all more important to younger people than older ones. The influence of a partner is far higher for women's support than it is for men's, with 21% of female football fans saying their partner supporting a club is a key reason for their own support, compared with just 6% of men.

Reasons for club support is broadly consistent by fan segments, although predictably the strength of feeling is stronger among Club Loyalists than other groups, particularly when it comes to the influence of a team's success.

3.1.2

Which clubs are supported?

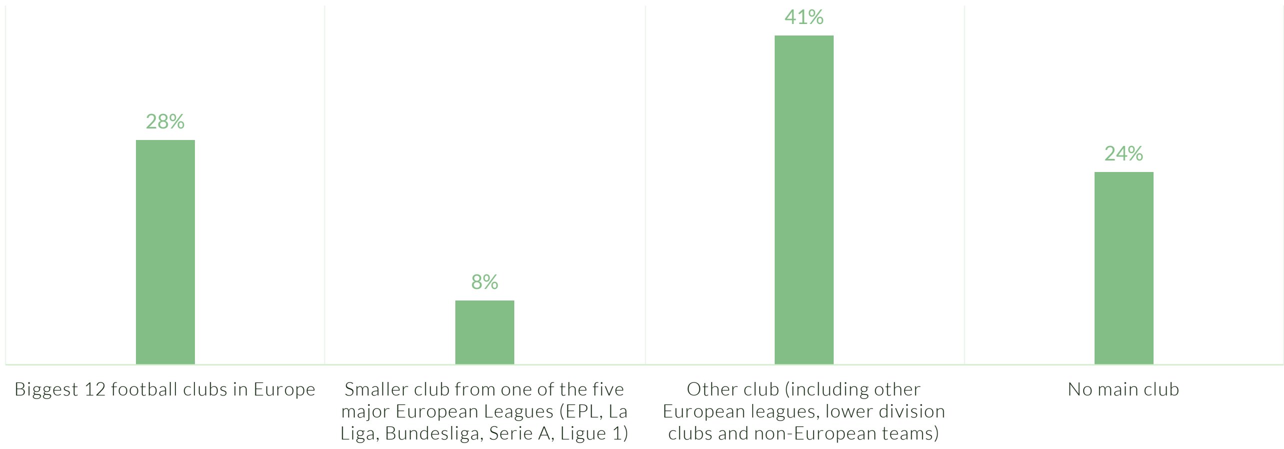
Given the importance of club success to fandom, particularly outside of Europe, it is salient to understand which specific clubs see the highest claimed support.

Over a quarter of fans in the markets we surveyed (28%) claim to support one or more of Europe's biggest football clubs (as defined by long-term success and financial performance) [1]. A further 8% support another club in one of the big five leagues around Europe (Premier League, La Liga, Ligue 1, Serie A, Bundesliga), and another 41% support a club outside of these top divisions (including the lower leagues in these markets, as well as other European and non-European leagues). A quarter of those who say they have an interest in football claim not to have a main club at all, predictably increasing among the fan segments of Tag Alongs, Main Eventers, and FOMO followers.

[1] Arsenal FC, Chelsea FC, Liverpool FC, Manchester City FC, Manchester United FC, Tottenham Hotspur FC, FC Barcelona, Real Madrid CF, Borussia Dortmund, FC Bayern Munich, Juventus FC, Paris Saint-German FC

Types of football club supported by football fans

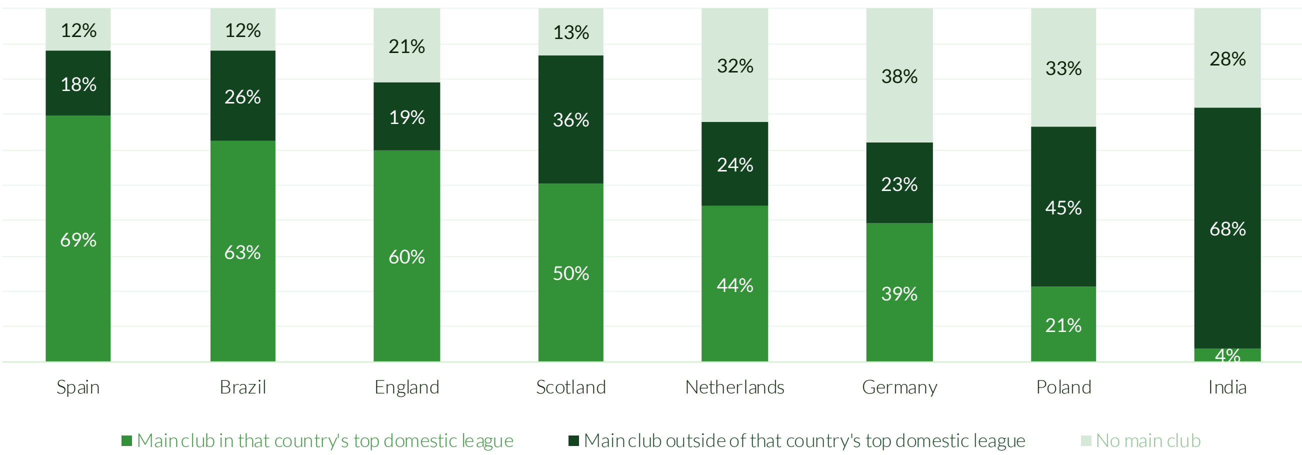
All interested in football, 13+



The majority of football fans support a club from their own country, particularly in the countries with a strong domestic league (England, Spain, Brazil). Other markets, such as India, Poland, and Scotland see a larger proportion of football fans who say that their main club is one from outside of their country, with English clubs performing strongly in India (Manchester United FC, Liverpool FC, Manchester City FC), and Spanish clubs performing well in Poland (FC Barcelona, Real Madrid CF) [2] .

Football fans by nationality and type of club they support

All interested in football, 13+



As seen with the general depth of football engagement, it is notable that 38% of football fans in Germany claim to have no main club and follow football for non-club related reasons.
Younger fans are simultaneously more likely to support clubs from around the world (and not necessarily just those in their own country), and to not support any individual club at all, which peaks at 36% of 16-24s.

Almost half of Tag Alongs (46%), and a third of FOMO Followers say they do not support a specific club.

[2] In general, UK respondents are considered although in this instance, it is useful and instructive to consider Scotland separately

3.1.3

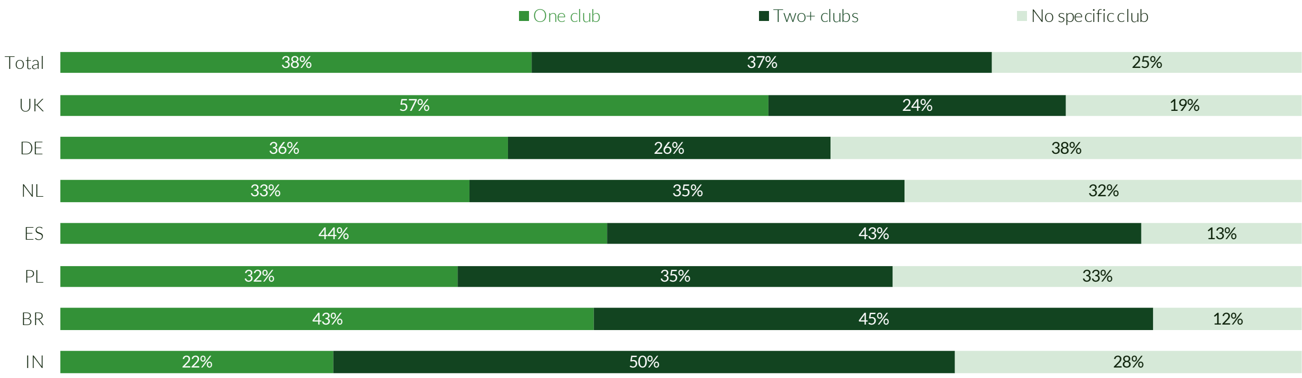
How many clubs do fans support?

A significant number of football fans support more than one club. In the questionnaire, there was a distinction between teams that people ‘support’ and teams that people ‘follow’. Supporting a club was seen to need some sort of emotional connection, with claims they were a true fan of that team. Following a club referred to a looser relationship, involving a passing interest in the performance of that club but not stating they were a fan. While it is possible for someone to follow, or indeed support more than one team, the focus of our analysis was on the club (or clubs) that people actively support.

Across all markets, an average of 37% of football fans say they support two or more clubs, ranging from 24% of football fans in the UK to 50% of fans in India. Indeed, fans in Brazil appear to have more similarities with the European markets where football fandom is generally strongest (UK and Spain), while India sees stronger patterns with those European markets with a slightly less fervent football fandom.

Proportion of football fans supporting two or more clubs

All interested in football, 13+, **by market**

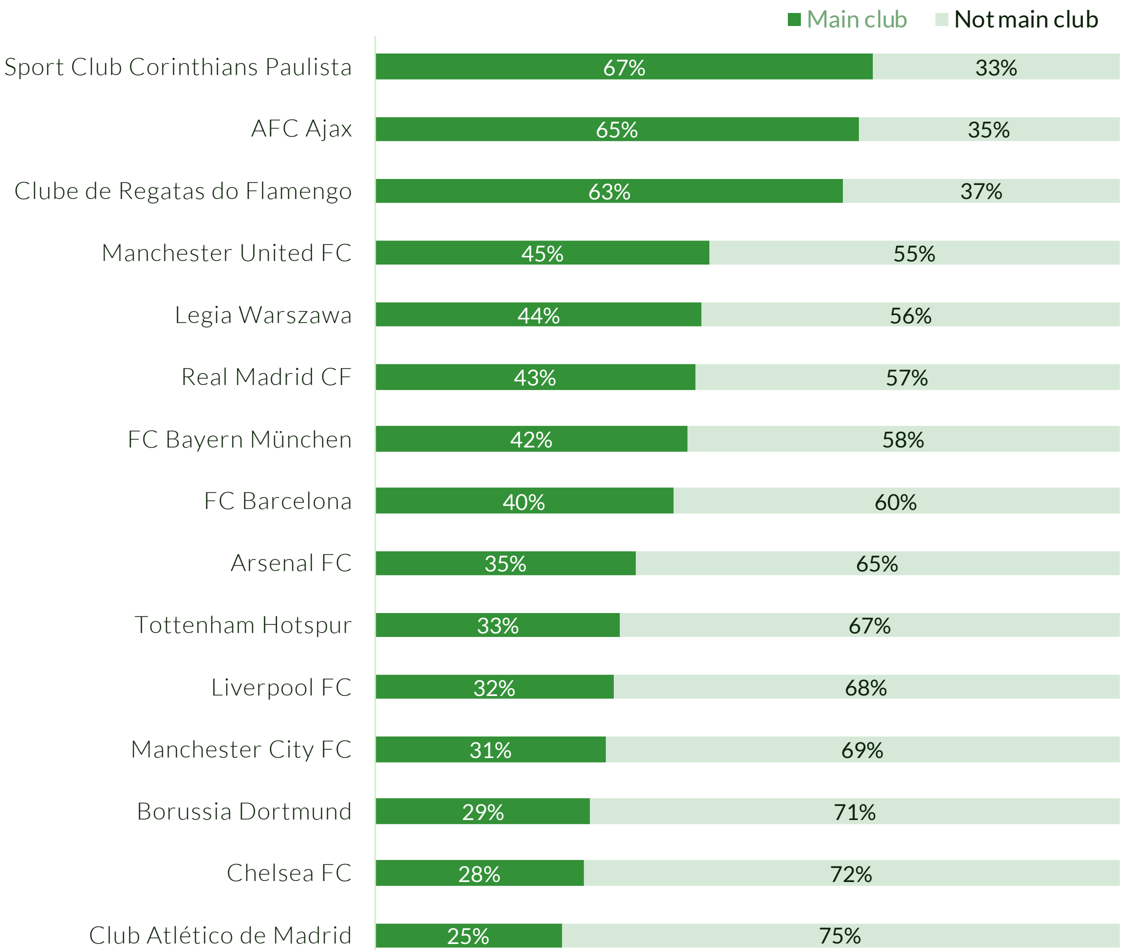


Where fans were shown to support more than one club, they were asked which one was their main club (and where only one club was selected, this was assumed to be each respondent’s primary club). This revealed the percentage of individual club supporters who claimed the club was either their main, or a supplementary, club.

For example, of all of the people who say they supported Manchester United FC, just under half stated it as their main club – a comparatively high figure when compared to the equivalent proportions for other European and global clubs. Conversely Club Atlético de Madrid, Chelsea FC and Borussia Dortmund all see proportionately higher proportions of fans saying these clubs are only supplementary, suggesting a looser general engagement in fans’ broader football preferences.

Proportion of club supporters who consider a certain club their main club **vs** those who support that club but don't consider it their main club

All interested in football, 13+



Younger fans are much more likely to support two or more clubs, ranging from 48% of 8-12s and 47% of 13-15s to 31% of 45-64s. Conversely, one club support increases with age.

Almost half of Football Fanatics (46%) say they support two or more clubs – a figure which is also high among Icon Imitators (38%). One club following is highest among Club Loyalists.

3.1.4

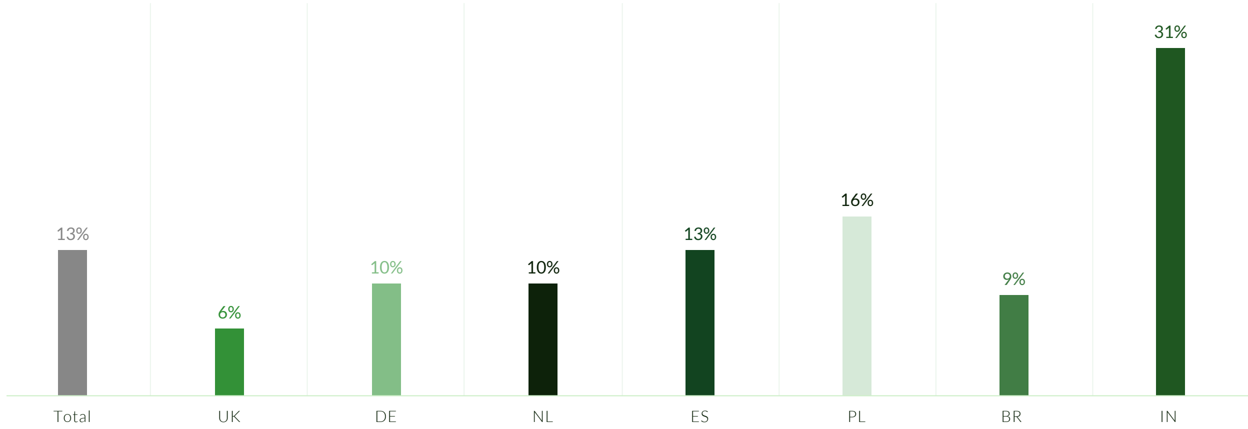
What role do players have on club support?

Players can be an important driver for fans to support a particular club or follow a particular league, with one in five global football fans saying they support their club because their favourite player used to play for them.

The importance of favourite players as a driver for club support is most important in India, where nearly a third of football fans say it is a factor. It is least important in the UK, where that figure drops to just 6%.

Percentage of club fans who support their club because their favourite player plays for them

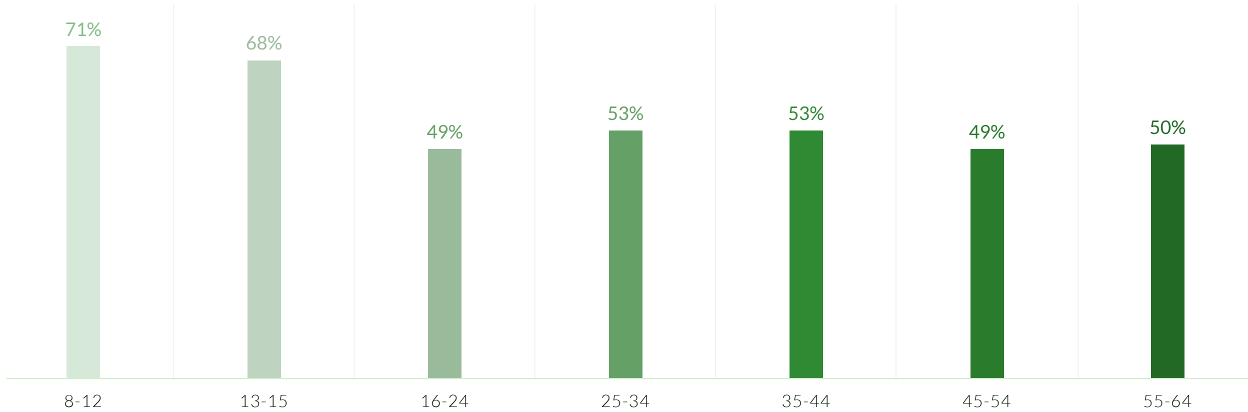
All who support a club, **by market**



Favourite players are a particularly important factor for younger audiences, with under 16s the most likely to say that they feel a strong connection to their favourite player. While it may not contribute to club support, players remain important for fans of all age groups, with around 50% saying that they feel connected to their favourite player (be that past or present).

Proportion of football fans who follow or feel strongly connected to their favourite player

All interested in football, **by age**



A larger number of Icon Imitators say they support a club because a player from their country either used to or still plays for that team.

3.2 Emotional engagement – how does football make people feel and what needs does it meet?

3.2.1

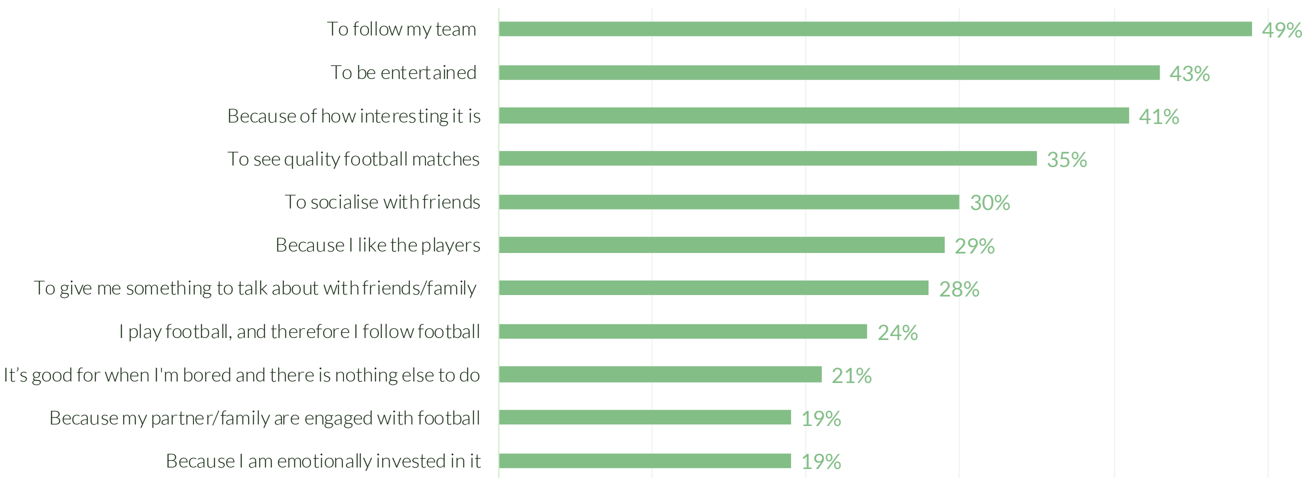
Over half of fans say they follow football not for their team, but for a range of other reasons

'Following my team' is cited as the most important reason people follow football consistently across all age groups and markets. However, at 49%, this represents a motivation for just under half of football fans in the sample, with a range of other more general reasons such as 'for entertainment', 'for quality matches' and 'to socialise' also coming through strongly.

Relatedly, only 19% of the football fans surveyed say they follow football in general because they are emotionally invested, highlighting a large proportion of more dispassionate football fans who have different needs from football, and who would therefore respond best to different methods of engagement.

Needs met by football

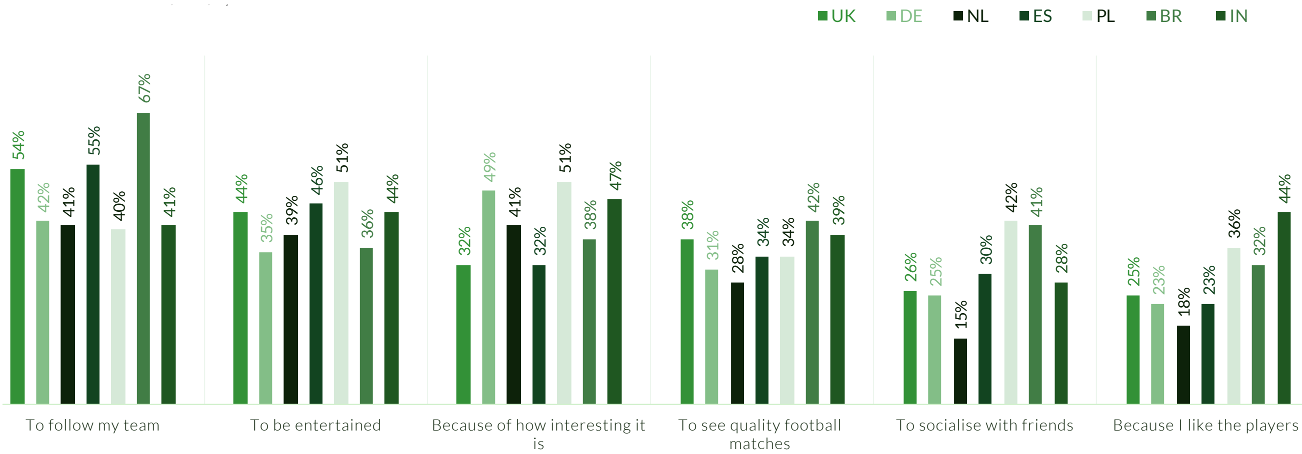
All interested in football, 13+



The importance of clubs to football fandom is highest in the UK, Spain and particularly Brazil. Fans in Poland are significantly more likely to say they follow football to be entertained or because of how interesting it is, while fans in India tended to focus on the importance of players in their fandom. Otherwise, football needs are fairly standard across all markets surveyed, including those outside of Europe. Though Brazil and India see fans that have a slight leaning towards following football for high quality matches, this is only marginally above the average within the European markets surveyed.

Needs met by football

All interested in football, 13+, **by market**

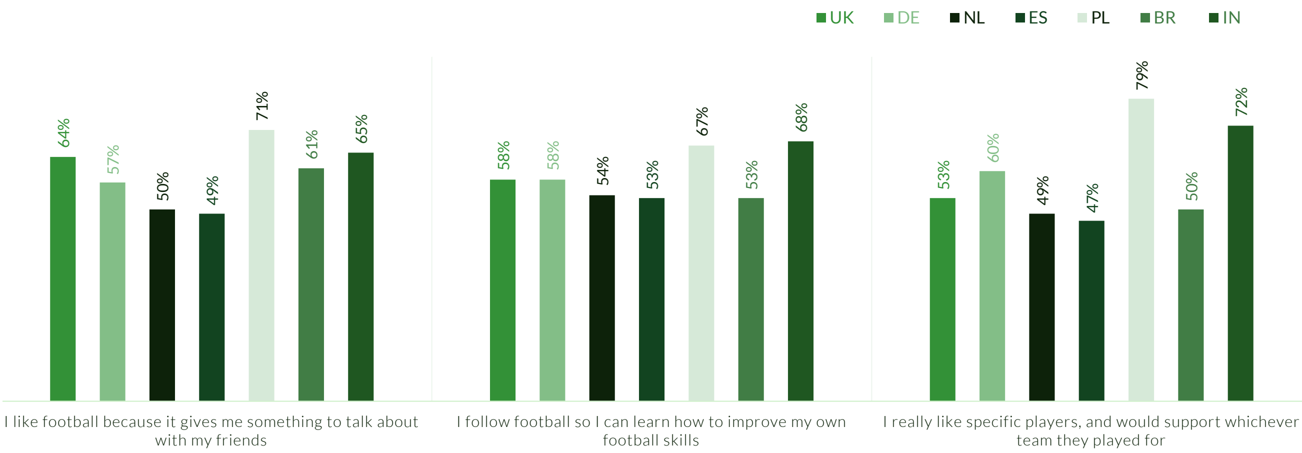


Those aged 8 to 12 are most likely to say they follow football because they play football (56%). They are also comparatively more likely to say they follow football because they like the players, and they find football relatable.

Young football fans in Poland are significantly more likely than other young fans to say they follow specific players, as well as football delivering other need states such as social currency and self-improvement. Both Germany and the Netherlands saw a larger number of young football fans say they follow football to help with their own football skills, ahead of liking players or using it to talk about with friends.

Young football fan emotional engagement

All interested in football, 8-12s, **by market**



Those aged 13-15, as well as those aged 45+, are most likely to say they follow football because of their team. This reason drops to 2nd among those aged 16-44, where "to be entertained" is cited as a more important reason for football following. Relatedly, importance of socialising decreases with age, while the those who say they follow football for high quality games is 55+.

27% of Tag Alongs and 24% of Main Eventers stated they follow football because their partner or family is engaged with the sport.

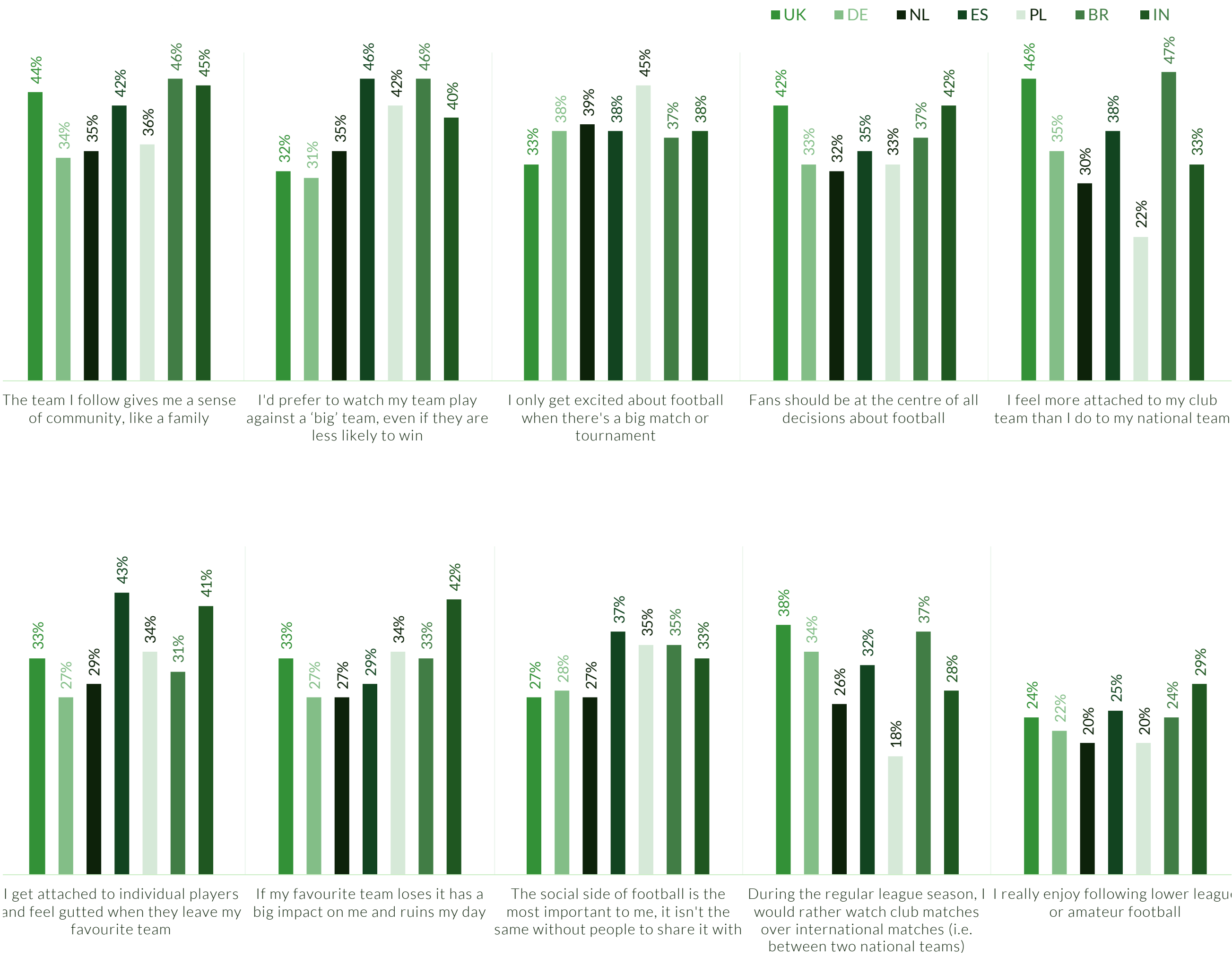
3.2.2

The level of emotional engagement with football varies by market

We define ‘emotional engagement’ with football as the different ways in which football makes people feel, and the reasons that they say they follow the sport, both of which differ significantly by market. Fans in the UK (46%) and Brazil (47%) feel most attached to their club teams ahead of their national team, and also say that their clubs give them a sense of family and community. Polish fans tend to prefer ‘big’ matches or tournaments (45%) and are least likely to feel attached to their club team (22%).

Football fan emotional engagement with football

All interested in football, 13+, **by market**



Fans in Spain (43%) and India (41%) are most likely to get attached to individual players.

3.2.3

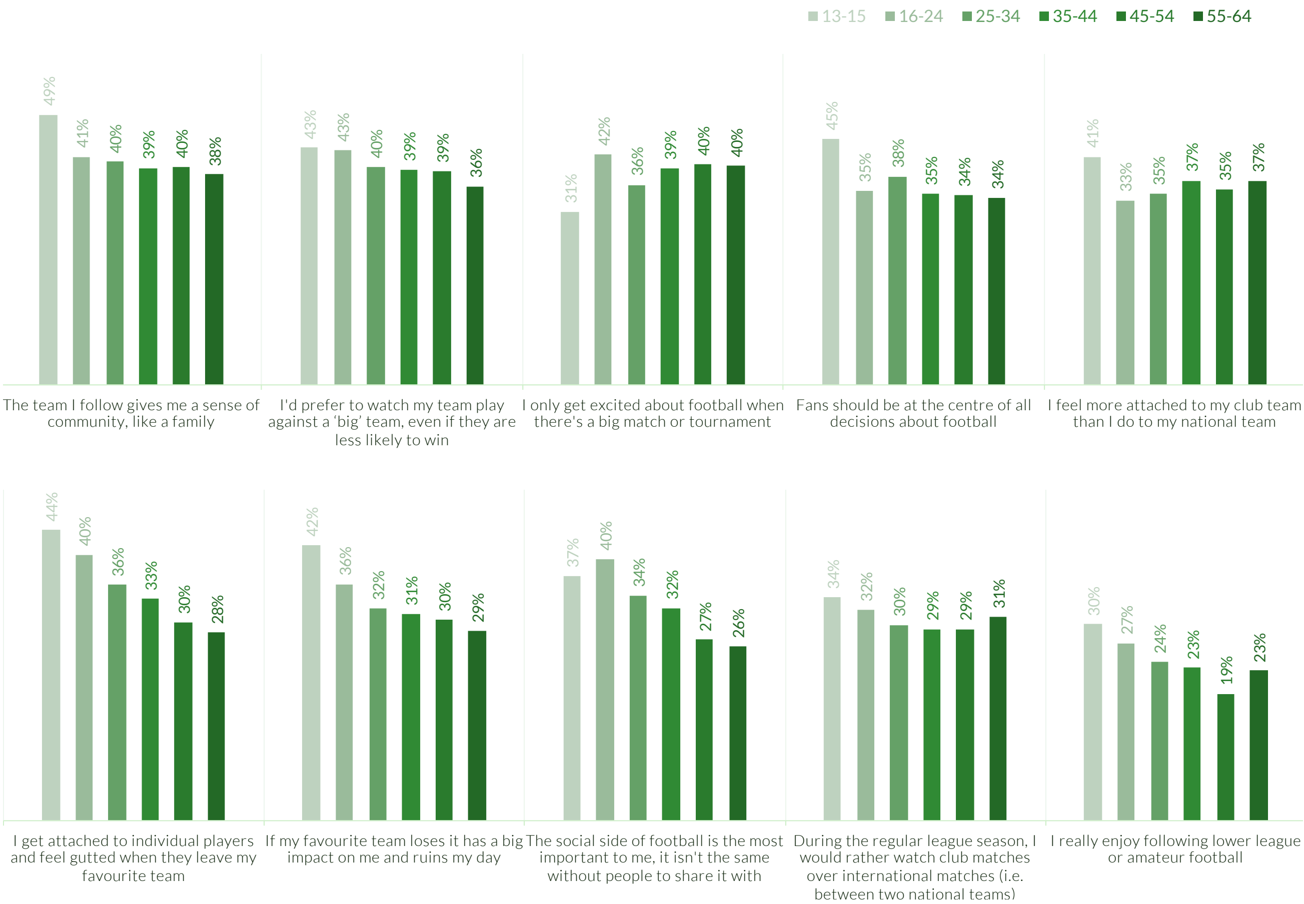
Emotional engagement also varies by age

'Emotional engagement' with football differs significantly by age. For example, 'to follow my team' drops from 49% among all fans to 37% for 16-24s, and rises to 54% among 45-64s. Conversely, 40% of 13-24s say that they follow football because they like the players, compared to 29% among fans of all ages, and 17% of 45-64s.

Emotional engagement with football tends to be highest amongst younger fans (13-15s). They are particularly likely to feel a sense of community from football (49%), a strong connection to their club (41%) and believe fans should be at the centre of decisions about the sport (45%). This sense of emotion tends to decline as fans get older, with the exception of excitement about big matches or tournaments (which moves in the opposite direction), and agreement that fans should be at the centre of decisions about football, which stays consistent throughout.

Football fan emotional engagement with football

All interested in football, 13+, **by age**

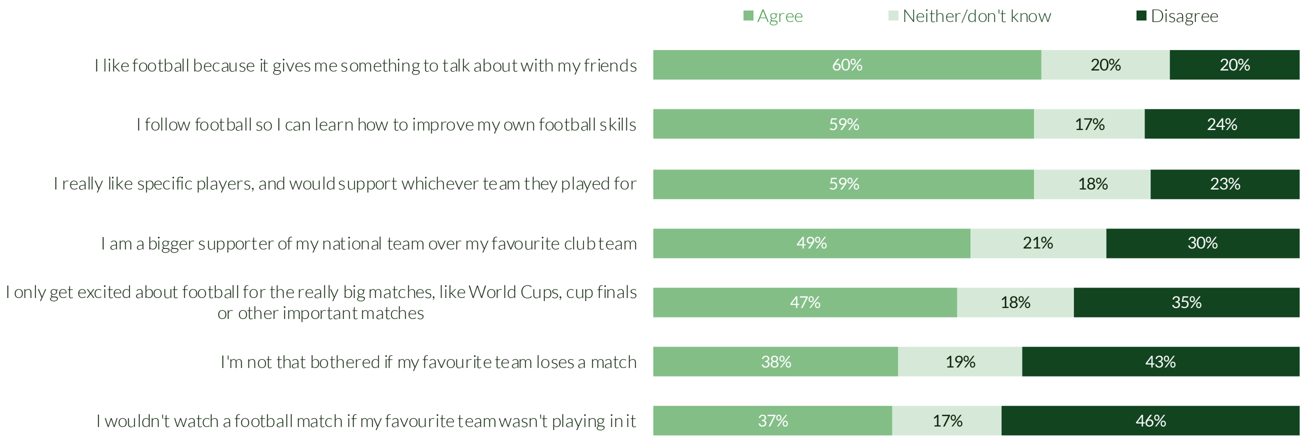


Younger fans are also most likely to say they get attached to individual players, a team loss ruins their day, or to be upset by player transfers; these concerns tend to decline with age. This points to the slightly heightened emotions football fandom carries with it amongst younger groups.

Almost half of 8 to 12-year olds say they are bigger fans of their national team over their club team – a figure which pivots as soon as respondents enter their early teenage years. Among all other age groups (16-64), the national team sees slightly higher preference vs their club team.

Young football fan emotional engagement

All interested in football, **8-12s**



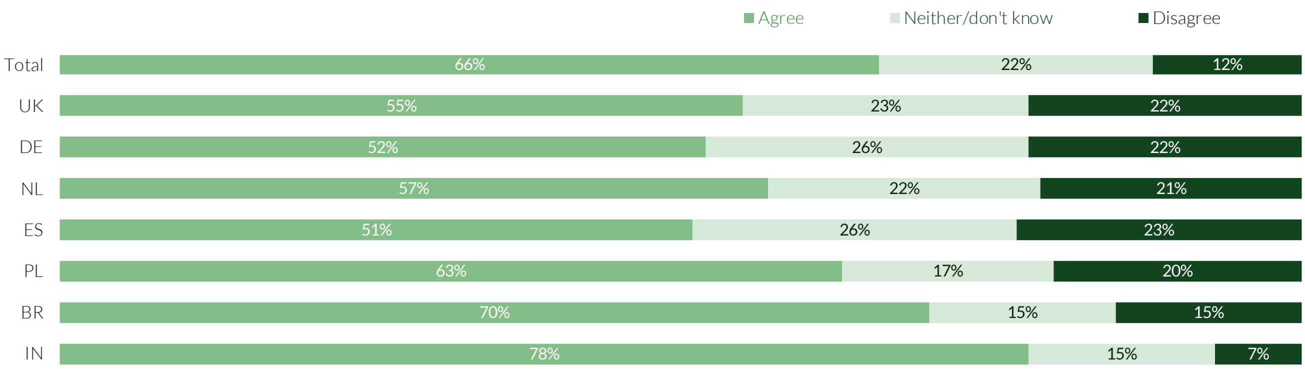
3.2.4

The wider community is important to football fans in all markets

Fans in all markets say football clubs have a responsibility to the wider community. Despite this, 20% of football fans in Europe disagree with this statement, suggesting for them football clubs merely exist as a means of entertainment, rather than having a broader responsibility elsewhere. Fans outside of Europe appear to have stronger feelings on this topic.

Proportion of football fans agreeing that football clubs have a responsibility to the wider community

All interested in football, 13+, **by market**



Interestingly, those aged 55+ in all markets are most likely to agree that football has a responsibility to the wider community and to help make the world a better place. Over two thirds of this age group agree with this statement (68%), compared to less than half of 16-24s (46%).

3.3 **Consumption** – more of the same, or a digital revolution?

3.3.1

Watching games at home remains the most important way of consuming football despite an increase in other ways to engage with the sport

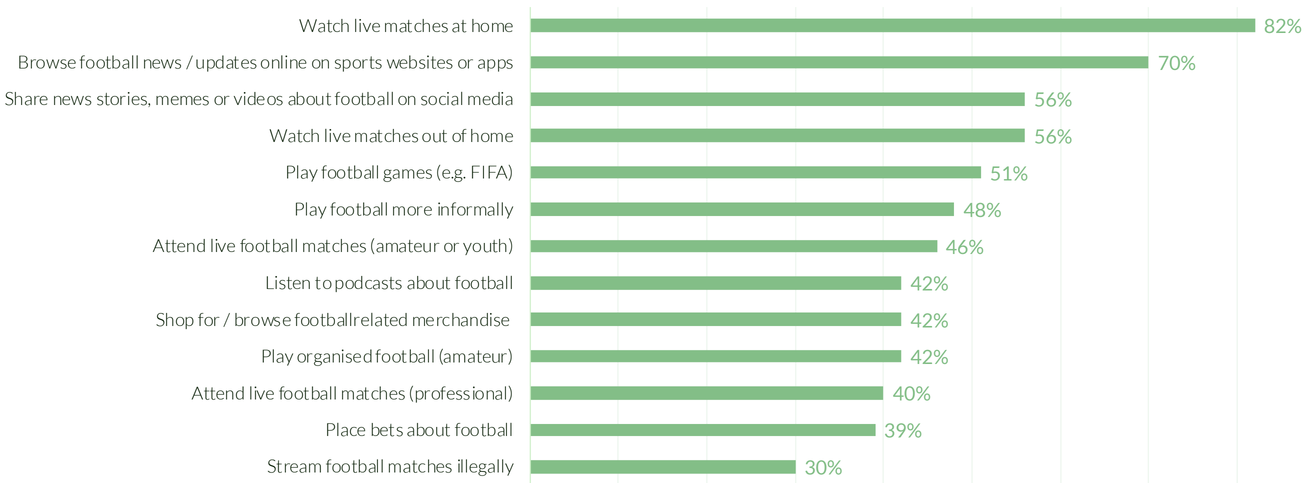
Fans today have a wide range of ways to engage with football; the expansion of services such as news sites, fantasy games, and betting services provide a rich ecosystem of football content for fans.

However, still the most common way to engage with football is to watch live matches at home on TV; 82% of respondents suggest they do so at least once a month. Other viewing behaviours are also prominent - over half of football fans watch matches outside of their home on a monthly basis, and 40% attend live professional matches.

Despite the strong figures for traditional viewing, digital interaction with football is also extremely popular. Browsing football news online is the second most popular football behaviour, undertaken by 70% of football fans every month, with social media being a key place to do so (56% of football fans claim to share stories about football every month on social media). Football games and podcasts also come through strongly, with 51% and 42% of global football fans claiming to do so on a monthly basis respectively.

Football fan engagement with football, monthly

All interested in football, 13+



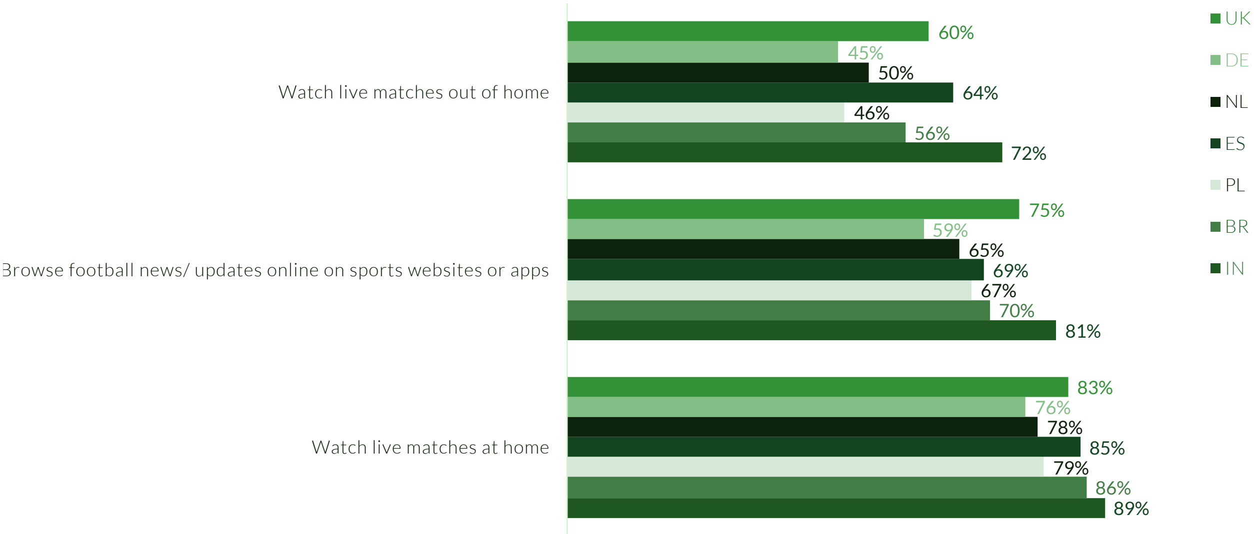
3.3.2

Behaviours around and opinions on football consumption are broadly similar in all markets

Most behaviours are consistent between markets. Around 80% of fans in each market say they watch football at home monthly, marginally increasing in non-European markets. Browsing for football updates is particularly common in India and the UK, which also saw strong figures for watching matches out of home, along with Spain.

Football fan engagement with football, monthly

All interested in football, 13+, **by market**



A similar number of people in all markets say that they play football either formally or informally on a regular basis.

3.3.3

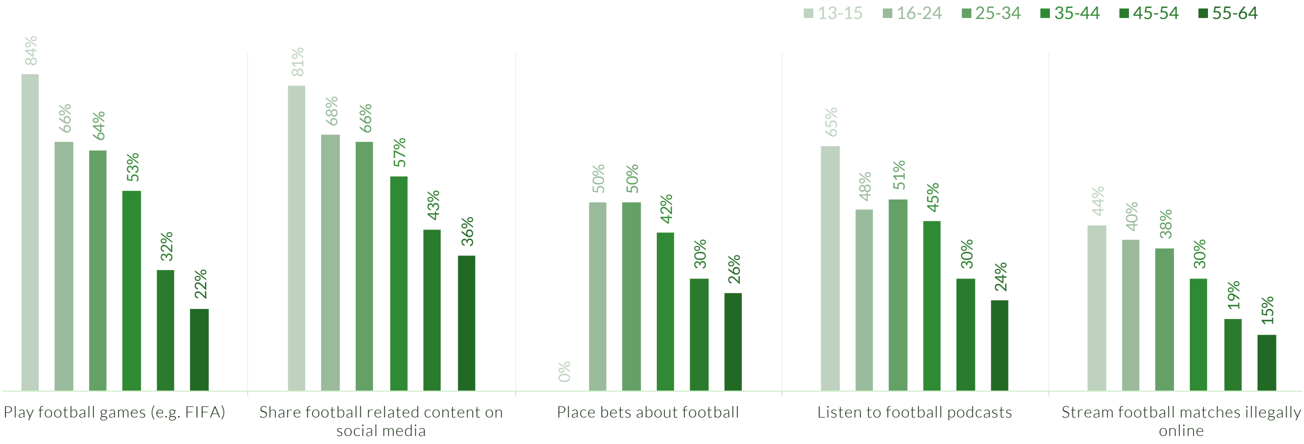
Digital forms of engagement are much stronger among younger fan groups

There are some stark differences in football consumption among different age groups. For example, in line with broader media behaviours and preferences, younger football fans are far more likely to say they both play football games and share football-related content on social media on a monthly basis, with a gradual drop off with each age category.

Other football behaviours, such as placing bets about football or listening to podcasts, see strong monthly engagement among 16-34s, while this group is also most likely to say they stream football matches illegally.

Football fan engagement with football, monthly

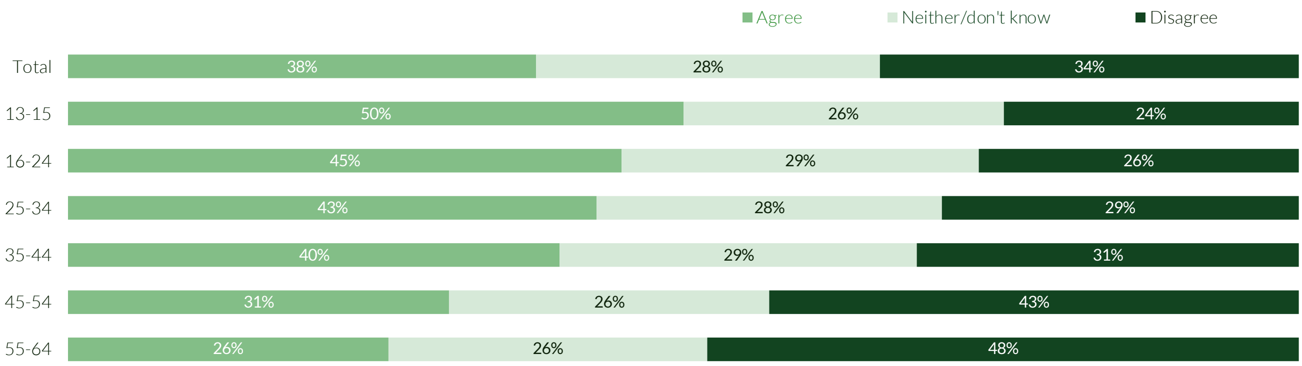
All interested in football, 13+, **by age**



Views on watching football on TV are mixed. Just over a third of all age groups (38%) agree that it is old fashioned, but a similar proportion disagree (34%). Age plays a big part in attitudes to watching football on TV; the desire to have more control over the viewing experience is highest amongst younger fans (13-15s 50%) and then declines with age.

Proportion of football fans agreeing that watching football matches on TV is old fashioned

All interested in football, 13+, **by age**



Among 8-12 year olds, the most common form of engaging with football was also watching games live on TV which came through at a very high 93% of football fans in this age group doing so monthly. This was followed by talking about football to friends (91%) and watching other programmes about football on TV (89%). Just behind these top three activities however were more modern forms of consumption – with 86% of this age group claiming to play football related video games on a monthly basis, and the same number saying they watch YouTube videos about football.

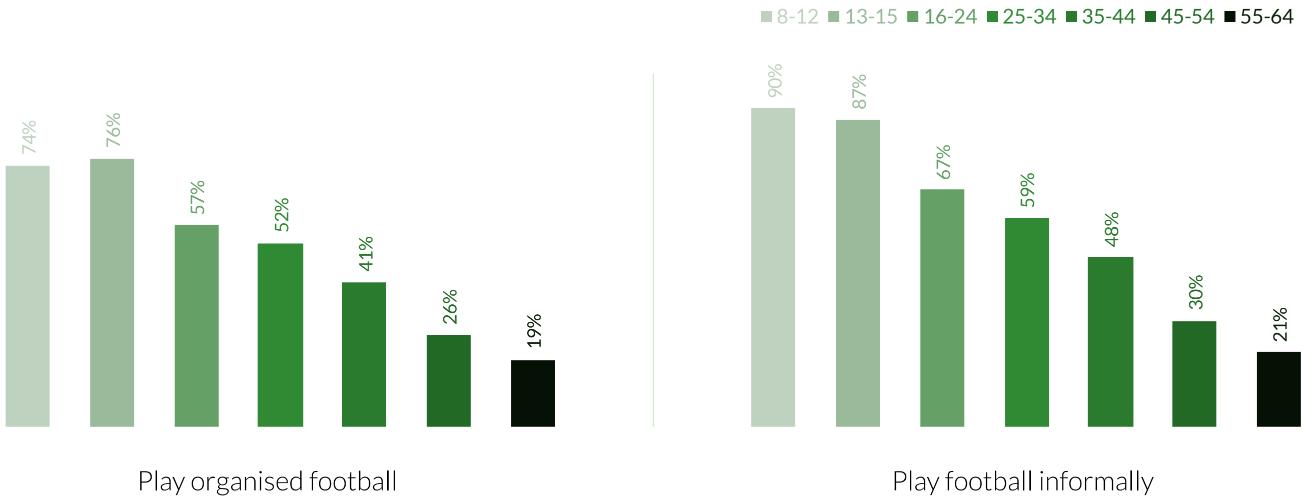
3.3.4

Playing football is strongly related to degrees of fandom, particularly among younger fans

Along with increased digital engagement, younger football fans are also significantly more likely to play football on a monthly basis, either formally as part of a team, or informally with friends. A very high percentage (90%) of all 8-12-year-old football fans play informally every month, dropping down to one in five among 55-64s.

Football behaviours by age

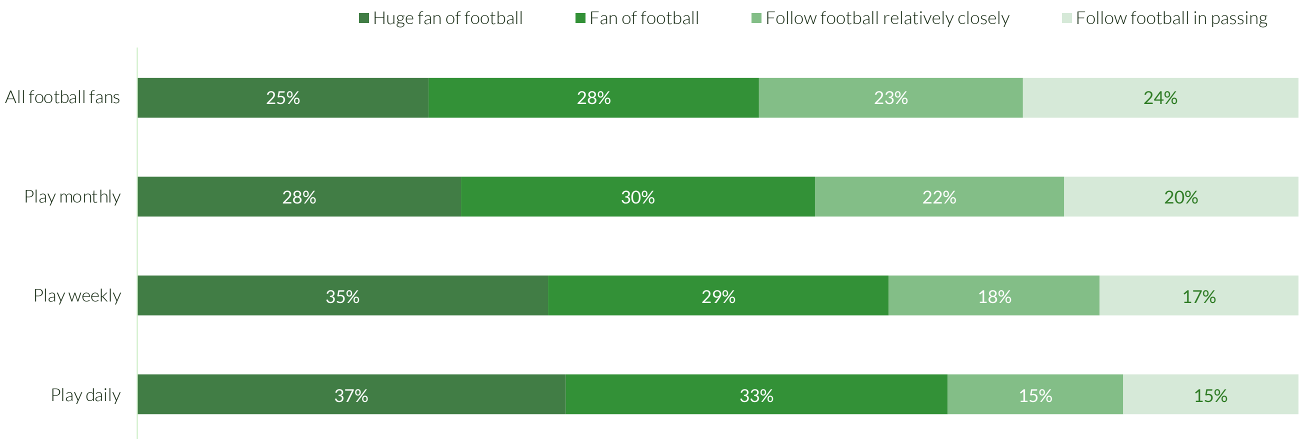
All interested in football, 8+, **all markets**



Participation in football is important in driving engagement with the sport. An increased frequency of playing football, even informally, is correlated with higher claimed football fandom, with a significant uplift in among people who play the sport weekly compared with those that play monthly. While this relationship is of course symbiotic, the importance of having opportunities to play football, particularly for younger fans, is vital in ensuring longer term engagement through teenage years when fandom typically falls away.

Proportion of football fans who play football informally with friends

All interested in football, all ages, all markets, by how often football fans play football informally with friends



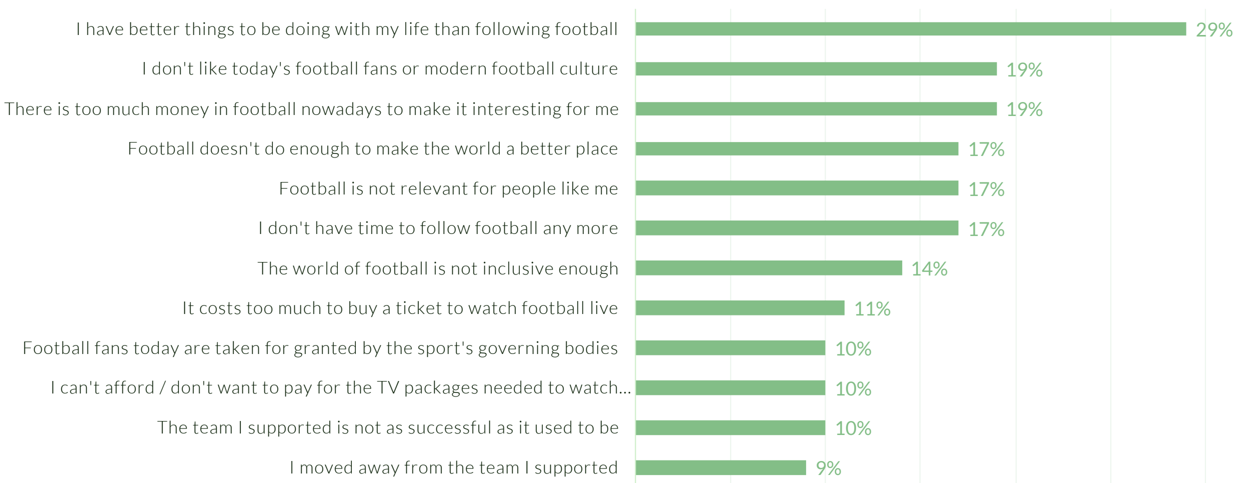
3.3.5

Price is not seen to be a significant barrier

Price does not appear to be as big a barrier to entry for football fandom. Only 11% of those people who used to follow football but no longer do so state that the reason they moved away was related to ticket prices, and only 10% say it was related to TV package prices. While a stronger proportion of this group say there is too much money in football, this is still relatively low at 19% (rising to 23% among those rejectors who have never been a football fan).

Reasons for rejecting football

All respondents who used to have an interest in football **but no longer do so**, 13+

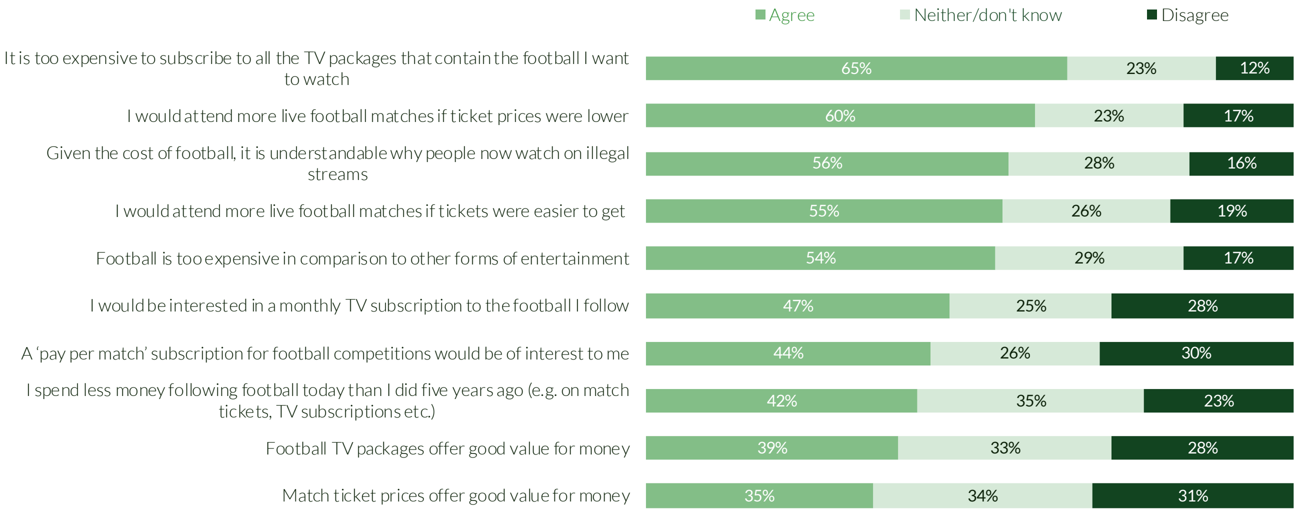


However, price can be a barrier to fans engaging more than they currently do. The cost of viewing subscriptions (65%) and match tickets (60%) are seen to be a barrier to fans engaging with football as much as they would like to, and football is perceived to be more expensive in comparison to other forms of entertainment by over half (54%) of fans.

High cost perceptions are also validating illegal streaming activity for over half (56%) of football fans. Despite this, there is only a moderate level of interest in monthly TV (47%) or 'pay per match' (44%) subscription options, which would enable fans to view the matches they want to more flexibly.

Football fan attitudes to the cost of football

All interested in football, 13+

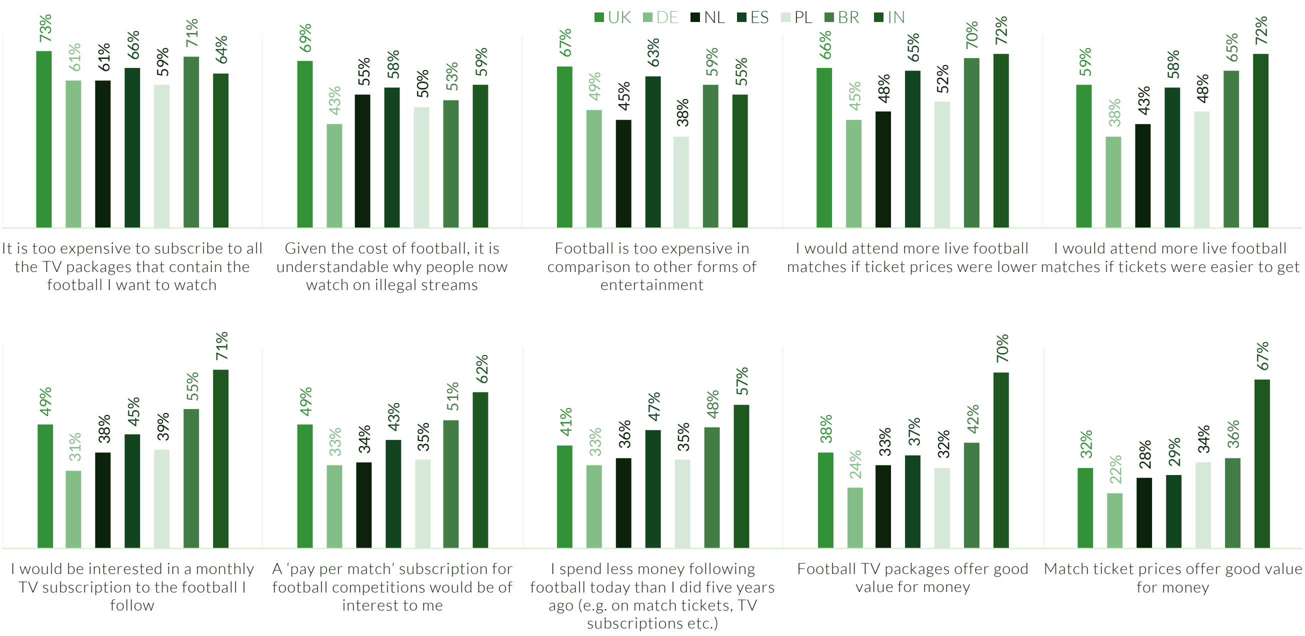


Football fans in the UK are the most likely to feel that it's too expensive to subscribe to all the TV packages for the football they want to watch.

Other forms of payment mechanisms, such as month-by-month subscriptions or 'pay per match' options are broadly appealing to fans in all markets, broadly in line with each country's strength of football fandom.

Football fan attitudes to the cost of football (% agree)

All interested in football, 13+, **by market**



Interestingly, there is little in the way of variation in how fans of different age groups feel about the cost of football, although there is a slight decrease with age when it comes to agreement with the statement "match ticket prices offer good value for money".

42% of football fans of all age groups say that they spend less money on football today than they did five years ago – a figure which peaks among those aged 25-44 (46%) but drops among those aged 55-64. A consistent 30% of fans say there has been no difference in their football spend over that period.

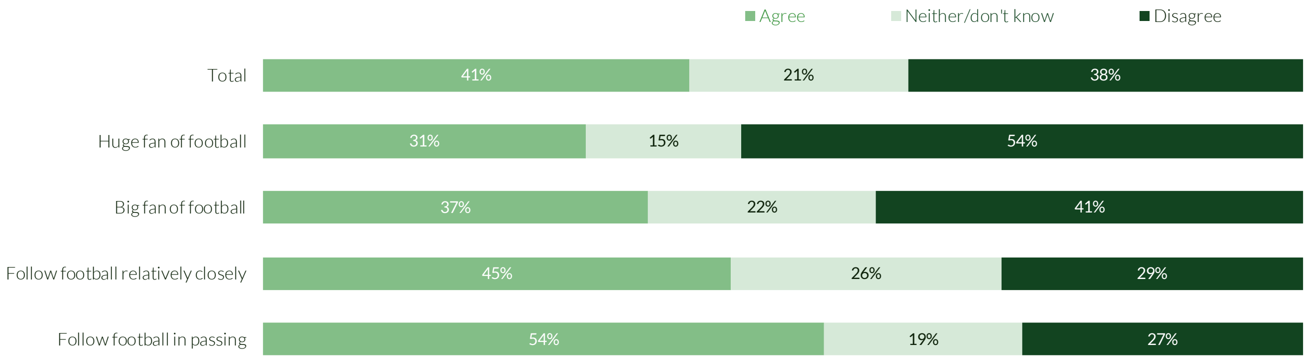
3.3.6

Football is substitutional as an entertainment choice, especially for lighter fans

Over half of 'huge' fans of football feel football is not something they could easily substitute with other forms of entertainment (54%), although a large proportion of this group see football in the same suite as other ways to be entertained (TV, films, other live events). Those who feel less engaged with football are most likely to see it as interchangeable (54%), although again, a quarter of this group feels like football serves a standalone need.

Proportion of football fans agreeing that they could easily substitute football with other forms of entertainment (e.g. TV programmes, films, other live events)

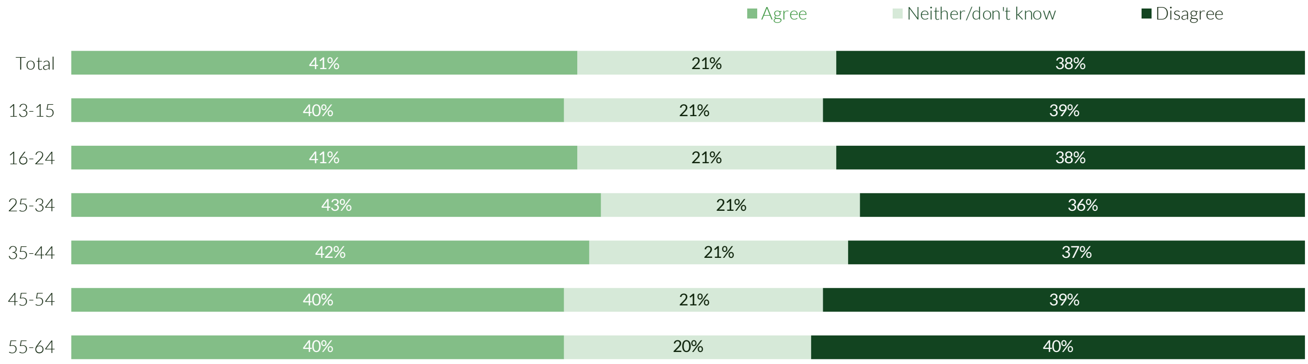
All interested in football, 13+, **by self-declared interest in football**



Fans in India are most likely to say they could easily substitute football with other forms of entertainment (55%), while those in Brazil and Poland are least likely to share that view (at 35% and 38% respectively).

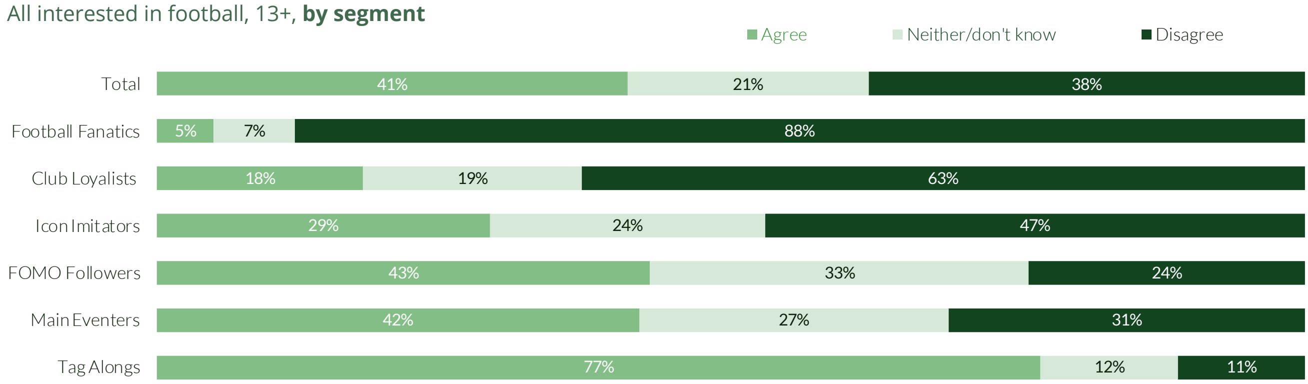
Fans' views on substituting football for other forms of entertainment are generally even across age groups. Around two in five (38%) fans of all ages feel that they could not swap football for other forms of entertainment, while a similar proportion (41%) feel it is easily interchangeable.

All interested in football, 13+, **by age**



We see agreement with football as a substitutable medium coming through strongly in the fan segments identified earlier. For example, Football Fanatics do not see football as something that could easily be substituted with other forms of entertainment while FOMO Followers, Main Eventers and Tag Alongs would find it easy to substitute football with other forms of entertainment.

All interested in football, 13+, **by segment**



3.3.7

Although fans feel the core mechanics of football should remain the same, some feel improvements can be made around technology and societal impact

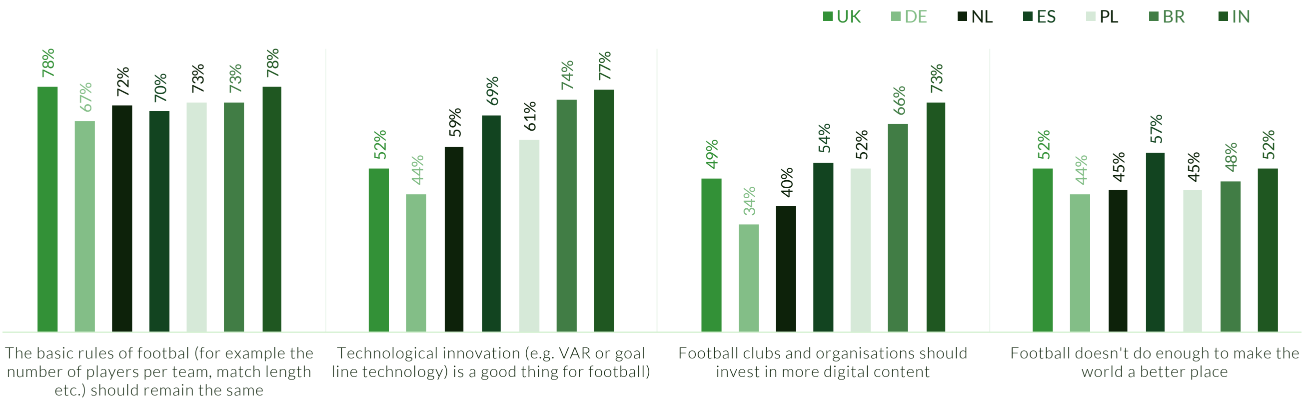
Most football fans in all markets think the basic rules of the match itself (e.g. team size, match length, pitch size) should remain the same. Indeed, across all markets, only 7% of people disagree.

There are bigger differences by market when it comes to fans' views on technological advances such as VAR and goal line technology. Although an average of 63% of football fans think these initiatives have been good for football, this drops to 52% of fans in the UK and 44% of fans in Germany. Fans outside of Europe (Brazil and India) are more likely to say that clubs should invest more in digital content, accounting for the differences in time zones and ease with which they can access live and linear matches.

Only one in five football fans believe that football is doing enough to address societal issues and almost half (49%) agree that it needs to do more.

Football fan attitudes to improvements to football (% agree)

All interested in football, 13+, **by market**



Younger fans (specifically those aged 16-24) are most likely to be open to changes to the core rules of football (e.g. the number of players on each team, the length of matches etc), although only 14% of this group disagree with the statement "the basic rules of football should remain the same" (vs an average of 7% among fans of all age groups) suggesting that the majority favour the status quo. Similarly, fans of all age groups are broadly in favour of technological innovation (e.g. VAR, goal line technology), with 58% of 16-24s saying it's a good thing for football, rising to 65% of 35-44s.

Football Fanatics and Club Loyalists are the most likely of our segments to agree that the fundamental rules of football should not change, but also of the view that technical innovation such as VAR is a good thing for football.

4 Implications for clubs

4.1 Club recommendations from this research

This research has delivered an up-to-date view on the nature of football fandom today, while the fan segmentation has highlighted six distinct types of football consumer, each with a different relationship to the sport.

Using this new understanding of global fandom, we have developed a number of recommendations for Clubs, to be considered as they look to grow fan engagement and increase revenue streams.

Given the underlying role that football plays for our six types of fan, the relationship between segments, and in particular how one might switch segments, is unclear (for example, this study does not conclude the most effective means to convert a FOMO Follower into an Icon Imitator). However, with further research, exploration and strategy, it may be possible to increase club loyalty and spend within each segment, and better take advantage of the changing nature of football fandom.

4.1.1

Understanding the football ecosystem and collaborating where necessary

Clubs play the fundamental role in the football ecosystem and should build on their strengths

Content, products, and services are provided for football fans from a wide range of stakeholders in football, including clubs, players, and leagues.

As the nature of football fandom continues to evolve, clubs must take a strategic view on which services they are best able to offer themselves, versus those that should be offered to fans by the broader market. Individual clubs must be clear about where their strengths lie and seek to understand how the role they currently hold in the ecosystem today might develop over time.

For some clubs this may mean a changing relationship with broadcasters, social media platforms and other media outlets, while for others it may require pooled resources and a shared understanding of the distribution landscape in five to ten years' time.
Similarly, clubs could better prepare for the future by conducting shared research to understand the needs that clubs currently satisfy within this ecosystem, and which they aim to fulfil (either as single entities or as a group of clubs) in the future.

4.1.2

Driving engagement with key fan segments

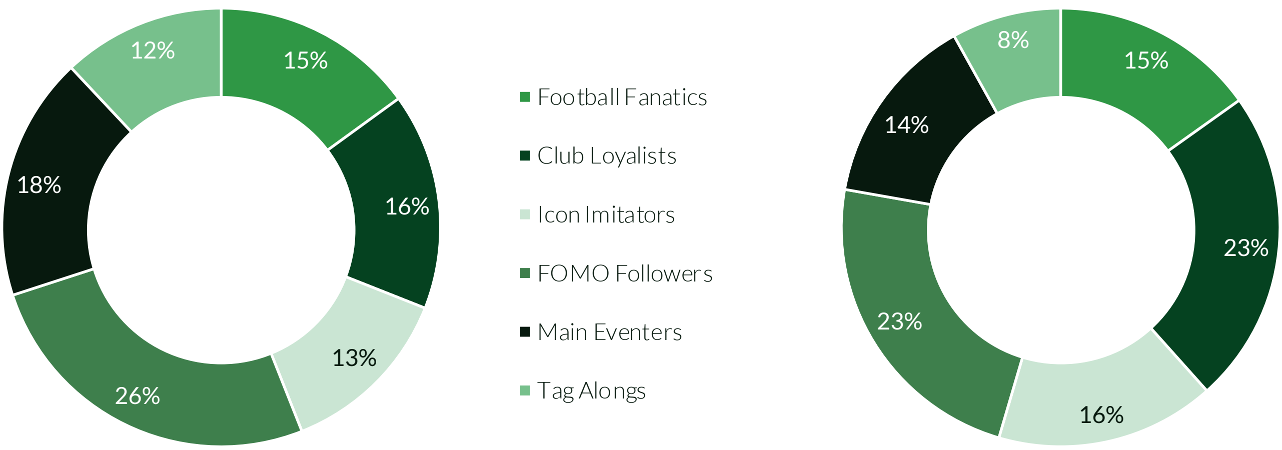
Clubs attract different types of fans and must tailor their approach to engagement

Clubs have the potential to offer a wide range of content, products, and services to its fans, but need to prioritise certain offerings to certain audiences, depending on the current composition of their base and the growth strategies which would lead to increased engagement. For example, as outlined in the exhibit below, a club app or podcast are likely be most effectively targeted to fans within Club Loyalist or Football Fanatic segment.

Each club should seek to understand the relative size of their fan segments and adapt its marketing and product strategy to reflect the needs of its core and target audiences more accurately.
For example, in the below exhibit, Club A is a global club brand, with a rich domestic and European history and global fan base. It sees a comparatively high proportion of lighter football fan groups (FOMO Followers, Main Eventers and Tag Alongs) and non-domestic fans, when compared to Club B, which is a comparatively smaller club having qualified for the UEFA Champions League group stages in three of the last ten seasons. Club B sees a larger proportion of the more engaged fan groups (Club Loyalists, Icon Imitators), and comparatively fewer fans from outside of that team's country.

Example large club (Club A)

Example medium club (Club B)



In order to drive an overall increase in fan engagement, these two clubs should prioritise a different set of products and services to meet the needs of the fan groups they want to focus on. This could range from match tickets and stadium experiences to online content such as highlights and OTT propositions.

Size of opportunity: High, Medium, Low

	Football Fanatics	Club Loyalists	Icon Imitators	FOMO Followers	Main Eventers	Tag Alongs
Highlights	Medium	High	High	High	Low	Low
News	High	High	Medium	High	Low	Low
Player interviews	High	Medium	High	Medium	Low	Low
Match tickets	High	High	High	Medium	High	High
Stadium tour	High	High	Medium	Low	Medium	High
Merchandise	High	High	High	High	Medium	High
Membership	Medium	High	Low	Low	Medium	Medium
Club OTT / TV subscription	Medium	High	Low	Low	Low	Low
Live preseason matches	High	High	Low	Low	Low	Low
Club app	Medium	High	Medium	Low	Low	Low
Club podcast	Medium	High	Low	Medium	Low	Low

Most clubs will already offer at least some of these products to their fans. However, each should be evaluated based on its ability to engage with targeted fan types, so as to avoid super-serving those who may already be sufficiently served by any given club, or where adoption may be close to saturation.

Clubs are also able to apply this segmentation approach to their direct-to-consumer fan communication, by using profile matching and surveys on their own CRM databases. This allows even more targeted fan strategies and activation routes, further driving engagement and revenue.

4.1.3

Participation

Clubs can improve engagement among all segments by driving increased participation

The research demonstrates a clear link between playing football and broader engagement with the sport, particularly amongst younger fans. Maintaining this link is key to ensuring football's future relevancy, and to ensure generations are not 'lost' to other sports and media types. Given the difficulty brands face in increasing engagement amongst young people, and given this groups' changing expectations of brands and entertainment destinations, there is a significant opportunity for Clubs to attract this lucrative audience through improved routes of participation – both physical and digital.

Clubs as brands can benefit their local community (and beyond) by setting up ways for young people to play the game in a competitive and enjoyable environment, helping them develop skills and feel part of a club's community. Given how many young people say they follow football because they play football, any ability for clubs to increase the opportunities to play (in a way that also benefits the clubs as brands) is likely to be associated with long term success amongst its younger audiences.

While football participation relies largely on playing the game itself, these audiences are increasingly looking for other ways to engage with the things they love. This means extending the feeling of involvement from the football pitch to the online world, where digital participation can also help foster feelings of ownership and deeper emotional attachment. Through social media and other digital platforms, clubs can increase an individual's sense of ownership of a club through initiatives such as Man of the Match voting, online quizzes and polls, and - where appropriate - direct fan access to decision making.

By successfully engaging young people through participation, clubs stand to drive long term relationships with this group, securing their fandom.

4.2 New hypotheses and areas for further investigation

This report is designed to be the foundational layer of insight that will provide the basis for more collaborative research in the future to better understand evolving football fandom around the world. The segmentation framework outlined in this report will help ECA and clubs in general to articulate and prioritise their research needs.

A number of potential topics and areas have already been identified for further analysis. In particular, given the timing of this report coincided with the COVID-19 pandemic, ECA is engaging with additional topics and research areas to consider as we start to understand more about the impact of COVID-19 on global football and football fandom. These new areas and hypotheses include:

1. **The impact of COVID-19 on fandom** – how do different fan groups think football should change in a post-COVID-19 world? How do they want to engage with competitions? How can the 'stadium experience' be recreated at a time when physical proximity might be limited, both domestically and around the world?
2. **Mapping the segments in other markets** – particularly focusing on potential global fan growth for clubs, how does football fandom demonstrate itself in priority markets such as the US, China, South East Asia, Australasia?
3. **The interplay between Tag Alongs and the other fan groups** – are there more opportunities to engage with this otherwise lighter fan group, to strengthen bonds and drive new revenue streams?
4. **The roles that secondary clubs have in football fandom** – what role do secondary clubs have for those who support more than one team? What drives people to choose additional clubs to support?
5. **The drift away from football** – what are the the key risk points for people who are considering moving away from football? What activity is most likely to keep them as self-declared football fans?
6. **The 'missing' generation** – why does football fandom drop among 16-24s, and how can clubs and organisations arrest this decline and increase engagement? Is this finding specific to this generation, or has this temporary shift always occurred among fans?
7. **The roots into football** – how do the youngest group of fans and potential fans (those aged 8-12) initially develop the football habit, and which levers should clubs pull to make sure the habit sticks?
8. **Better identifying participation opportunities** – what does 'good' look like when it comes to club and player participation? Which avenues provide the biggest opportunities (e.g. social media, gaming and esports, live events, community-based activity etc)?
9. **The relationship between cost and football** – while this research has suggested that price does not appear to diminish football fandom in general, what is the relationship between price and specific football behaviours (e.g. match attendance, TV subscriptions, club membership etc.)?
10. **Football consumption by device and platform** – what role do specific devices and platforms have in football fandom (e.g. mobiles, social media, podcasts)?
11. **Spotting new trends and behaviours** – how will football fandom and fan behaviours continue to develop in the coming years? What are some of the underlying and difficult to explain factors driving these changes (best understood through non-survey research approaches)?

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