

# The State of Sports Fan Engagement 2023

Report produced by iSportConnect in partnership  
with Choicely

April 2023

# The State of Sports Fan Engagement

## Introduction

The State of Sports Fan Engagement 2023 report is based on a survey conducted by iSportConnect, in collaboration with Choicely. The goal of the survey as well as this report is to.

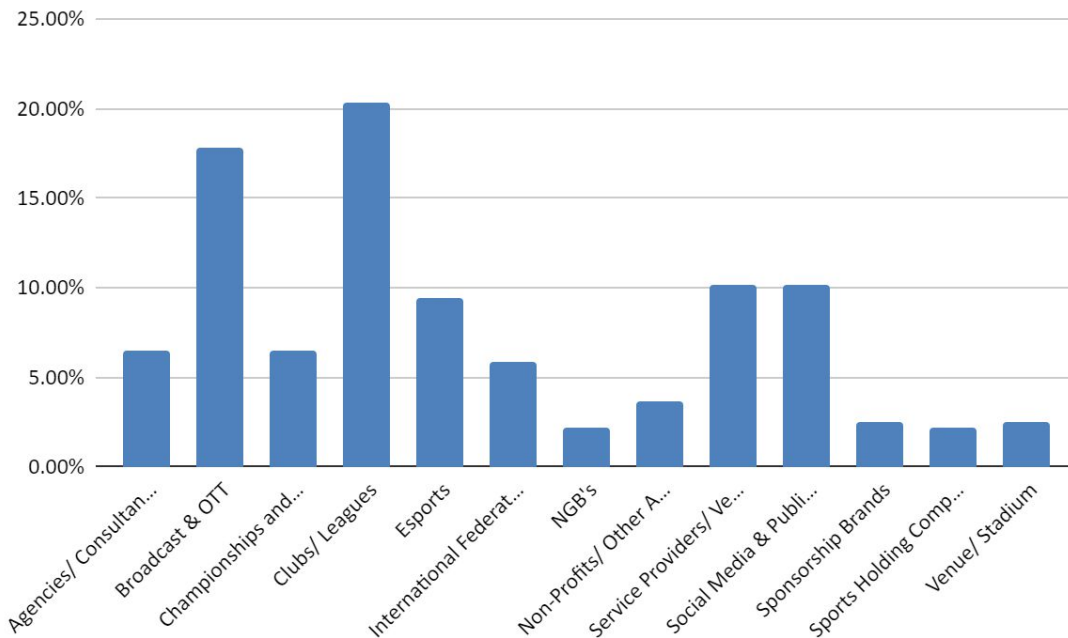
- understand the current significance of fan engagement, a term which not so long ago dominated the industry news
- uncover current attitudes towards fan engagement
- offer practical insights to sports industry and fan engagement leaders

The survey included eight questions related to sports fan engagement ranging from the importance of fan engagement to what technology is going to be the most revolutionary in the next three to five years. The data was collected via email in January and February of 2023.

For the purposes of the survey, fan engagement was defined for respondents as *“the process of interacting with fans before, during and after events to encourage their active participation, using a variety of channels and methods, with a view to creating and strengthening an emotional, lasting bond”*.

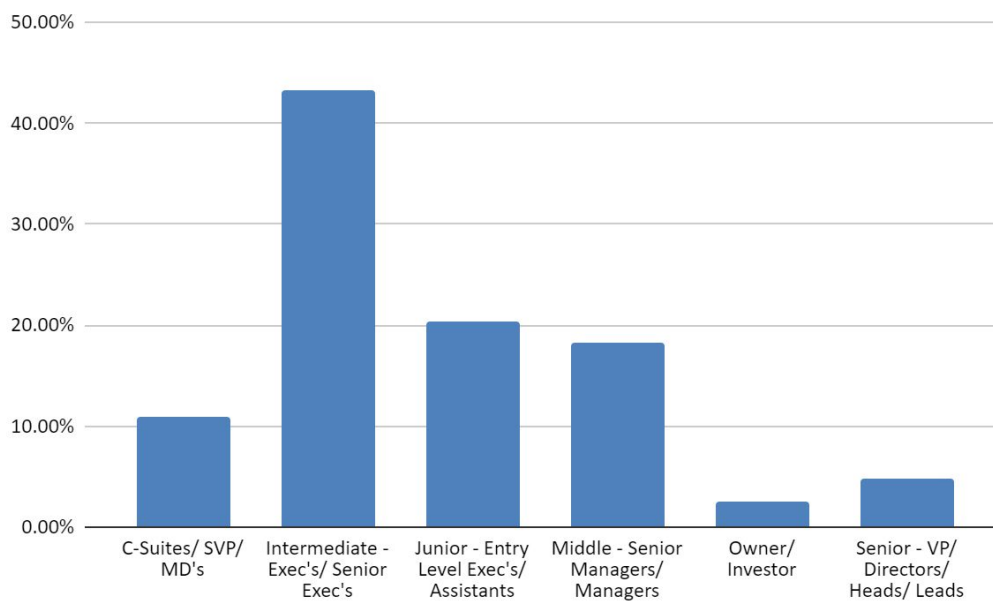
The survey canvassed the views of 289 industry executives from all across the sports business. 40% of respondents work on the rights holder side (for sports clubs, international federations and National Governing Bodies (NGB's), amongst others) and 60% work for agencies / consultancies or other sports industry service providers. In terms of seniority, 83% of respondents were classified in the middle or senior management level or above and the large majority of respondents were from the USA. From a job function perspective, respondents tended to be working in the more tech-enabled areas of the business, including Broadcast & Media, Data & Technology and Digital & Social Media. Company Operations and Consultancy were both also relatively common.

## Which of the following best describes the industry which you work in?



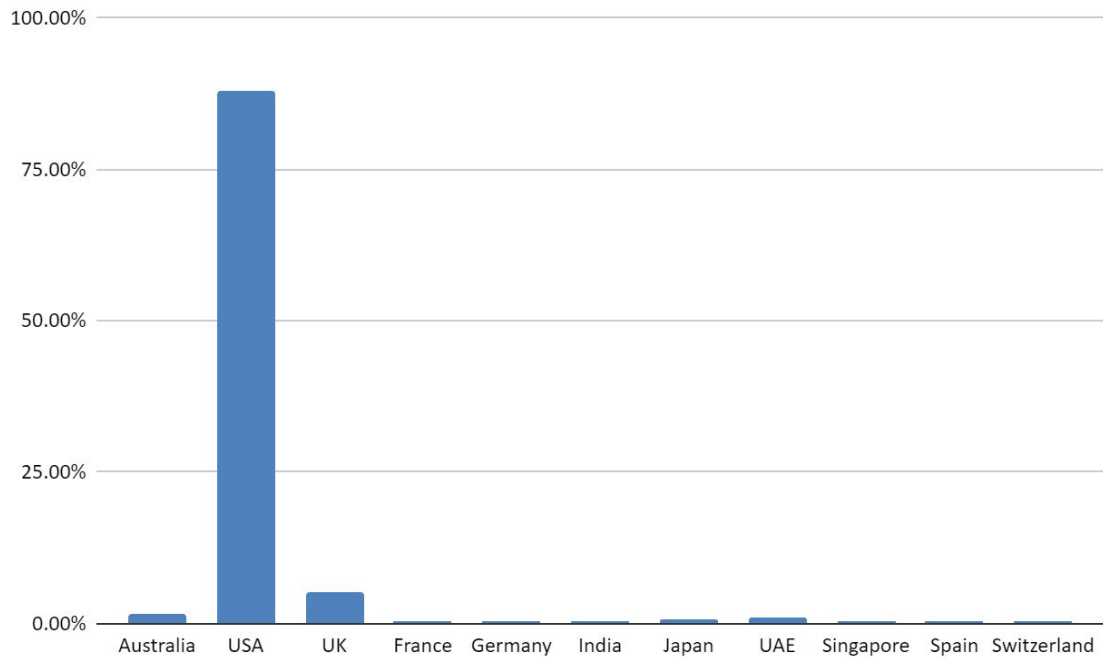
[Single response]  
n= 289 (all respondents)

## Which of the following best describes your job level?



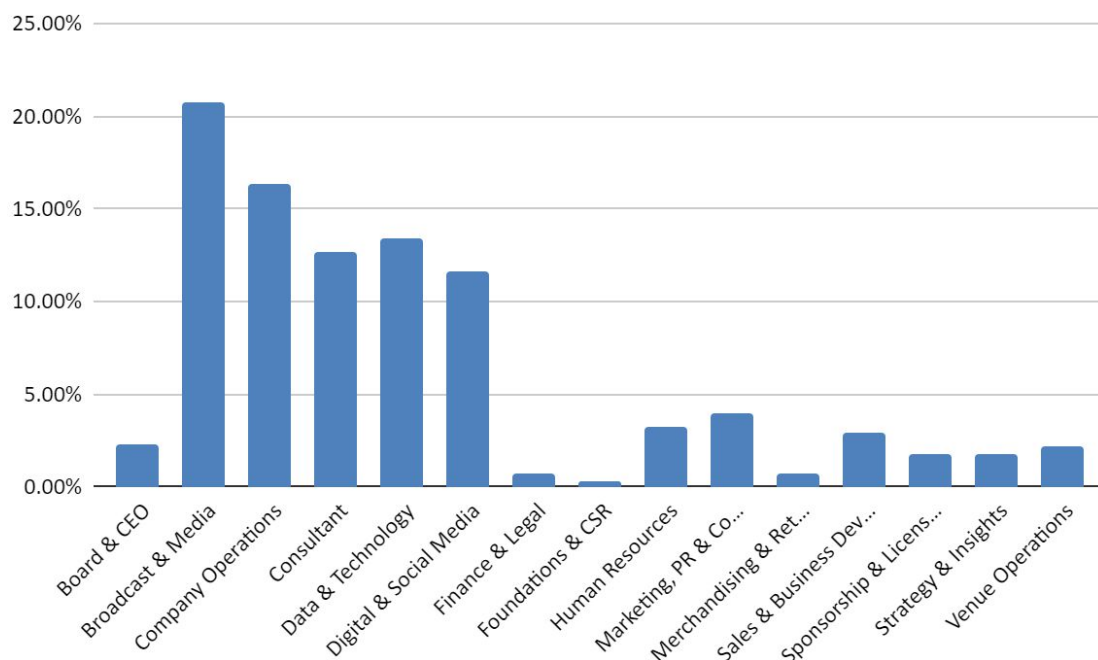
[Single response]  
n= 289 (all respondents)

### In which country are you based?



[Single response]  
n= 289 (all respondents)

### Which of the following best describes your job function?

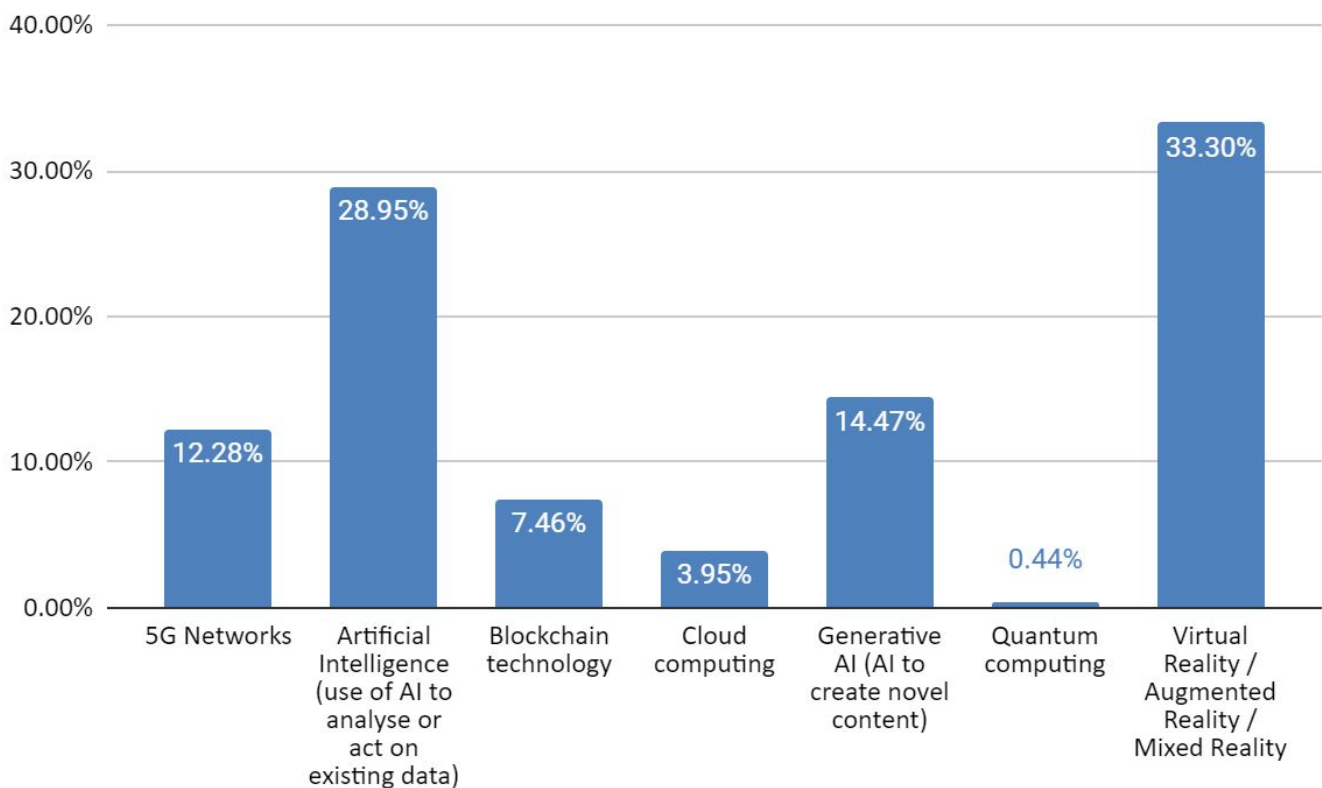


[Single response]  
n= 289 (all respondents)

## About The Report - Back To The Future

43% of respondents believe that artificial intelligence (AI) or generative AI will be the most revolutionary technology in the field of fan engagement over the next 3-5 years. Therefore it is with this in mind that we have leveraged a generative AI platform, Chat GPT, to create some of the commentary that you will read in the report.

### What single technology will be the most revolutionary for the field of fan engagement in the next 3-5 years?



[Single response]  
n= 289 (all respondents)

Additional commentary is provided by David Fowler of iSportConnect and Heikki Rotko of Choicely.



David Fowler is the Managing Director of iSportConnect's Advisory team where he supports best-in-class companies with their sports market entry and growth strategies and is also a Co-Founder of the world's first sports technology marketplace, SportsTech Match. He frequently writes on the topic of fan engagement.



Heikki Rotko is passionate about new developments within digital media, sports and entertainment businesses. He has worked with these industries all his career and is always seeking for interesting conversations and opportunities. At Choicely Heikki Works as Investor, Executive Chairman, and is in charge of commercial activities and investor relations.

## Executive Summary - The Speed Read

Overall, the survey highlights the importance of fan engagement in the sports industry and the need for organisations to focus on digital channels and interactive content to keep fans engaged. The results also suggest that there is room for improvement when it comes to data analytics and market research, and that virtual / augmented reality and artificial intelligence are set to play a significant role in the future of fan engagement. (ChatGPT)

### **Fan engagement is still widely accepted as an important field amongst sports industry professionals**

- 71% say fan engagement is important or very important to their organisation
- Only 5.2% say it is “not important” or “not important at all”
- Revenue generation (24%) is the number 1 fan engagement goal followed closely by growing website traffic (23%)

### **Social media (37%) is by far the most important digital channel to enable sports organisations to achieve their fan engagement goals**

- This is followed by a second tier of channels which includes OTT streaming platforms (18%), mobile apps (13%) and websites (11%)

### **Video (37%) is by far the most important content format to drive fan engagement goals**

- Interactive formats (such as polls, surveys, voting and quizzes), with 18.3% of the responses, comes in a distant second

### **Data analytics (25%) and market research (25%) are the skills / capabilities that sports industry professionals see as most lacking**

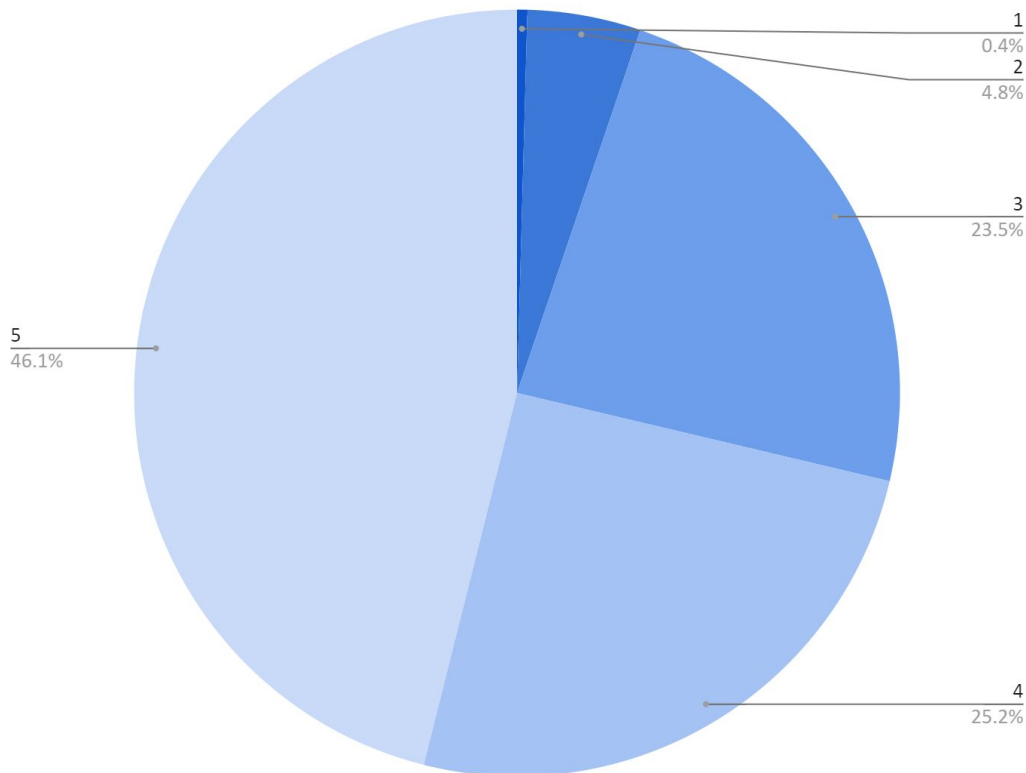
- Relatively few respondents cited commercial / monetisation skills and capabilities as lacking (9.42%)

### **Move over blockchain technology, the future of fan engagement is artificial intelligence (AI)!**

- 43% of respondents believe that AI / generative AI will be revolutionary for the field of fan engagement over the next 3-5 years
- Virtual / augmented reality also scored very well (33%)
- Somewhat surprisingly, blockchain technology scored relatively low (7%)

## The Importance of Fan Engagement

**On a scale of 1 to 5 (where 1 not important at all and 5 = very important), how important is fan engagement to your organisation?**



[Multiple response]

n= 231 (all respondents excluding service providers and agencies / consultants)

Firstly, the survey asked respondents to rate the importance of fan engagement to their organisations on a scale of 1-5, with 5 being the most important. A staggering 46.1% of respondents gave the highest possible rating of 5, suggesting that fan engagement is a crucial priority for many organisations. However, 5.2% of respondents rated fan engagement as not important or not important at all, indicating a concerning lack of interest in engaging with fans. (Chat GPT)

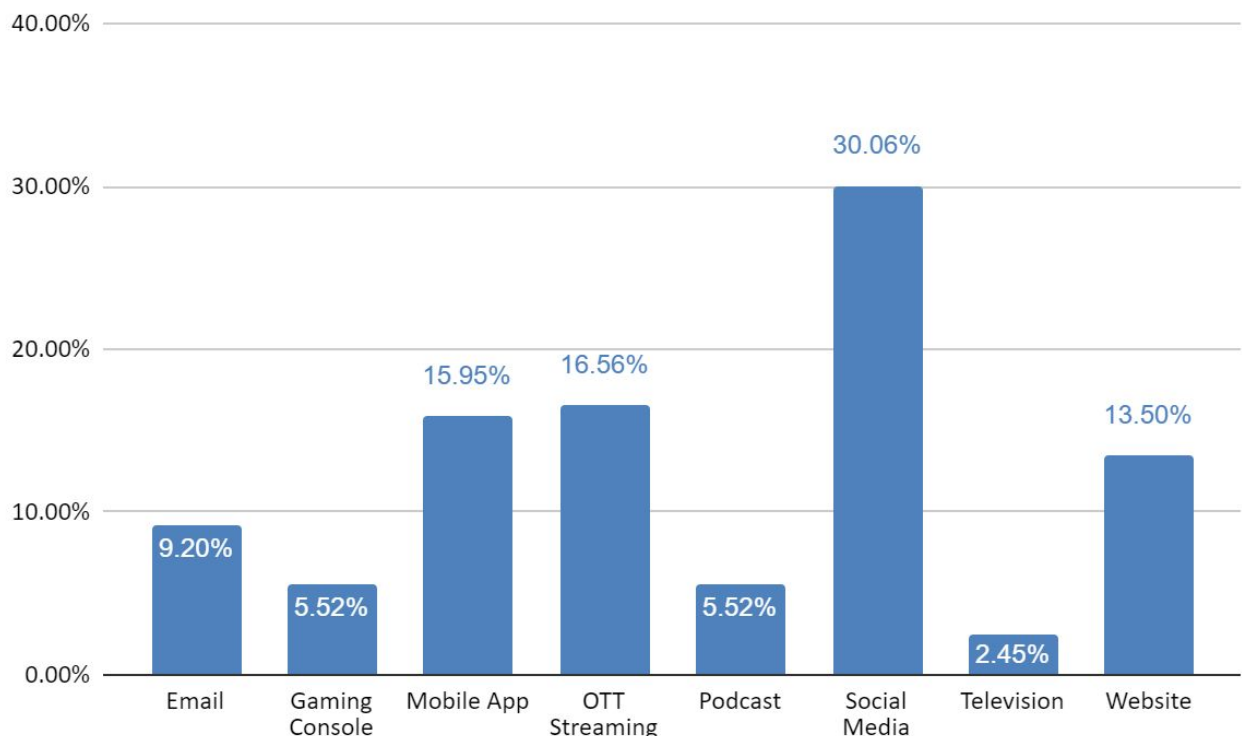
David Fowler, iSportConnect:

*“Google Trends is a good proxy for the gradual reduction in attention given to fan engagement as a concept as new “buzzwords” have taken over. [Their data suggests](#) a steady decline since 2004 in usage of fan engagement as a search term. However, despite the lower levels of usage of the term in search, respondents to our survey still overwhelmingly see fan engagement as important to their organisations”.*



## Where Fans Spend Most Time

**Which of the following digital platforms do you think your fans spend their time on the most?**



[Multiple response]

n= 231 (all respondents excluding service providers and agencies / consultants)

The survey also delved into the digital platforms that fans spend their time on the most. Social media was the clear winner, with 30% of respondents believing this to be the platform of choice for fans. However, the results also showed that OTT streaming platforms and mobile apps are significant players in the fan engagement space, with 17% and 16% of respondents respectively indicating that fans spend a lot of time on these platforms. (Chat GPT)

Heikki Rotko, Choicely:

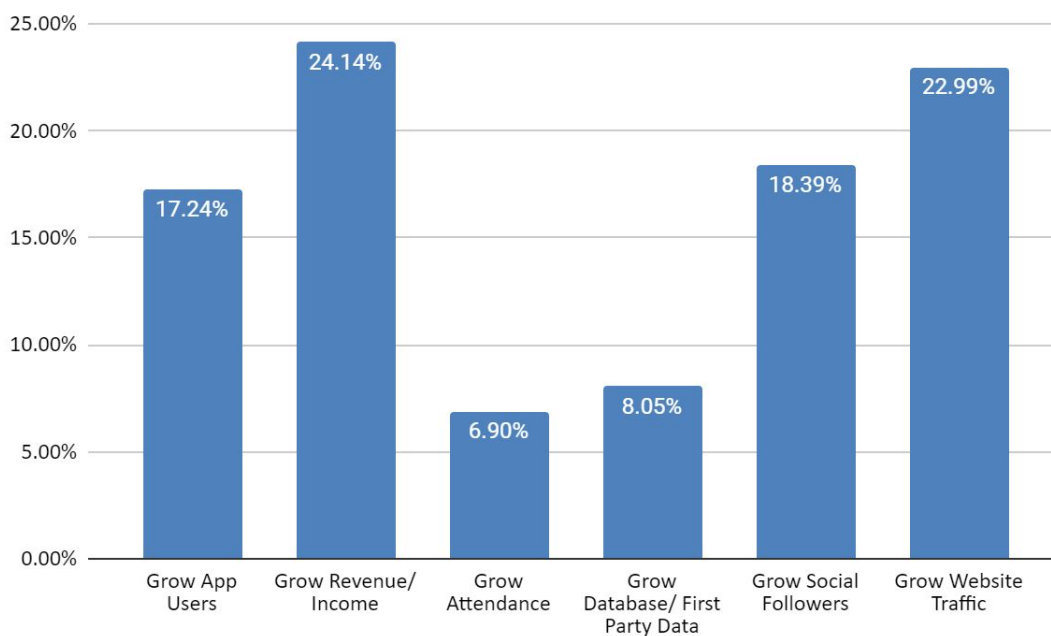
*“This supports the results of other studies, and what we see in our own daily life and work.*

*Practically everyone uses at least one social media platform, and according to other studies, people spend up to 4,5 hours a day on mobile apps. Large part of that usage goes to social media apps, but these apps also include other types of apps such as fan engagement apps in the sports context.*

*Streaming also makes a lot of sense. Most importantly, fan engagement is a multi-channel effort – the fans aren’t just on one platform.”*

## Fan Engagement Goals

**Which of the below options best describes your organisation's fan engagement goals?**



[Multiple response]

n= 231 (all respondents excluding service providers and agencies / consultants)

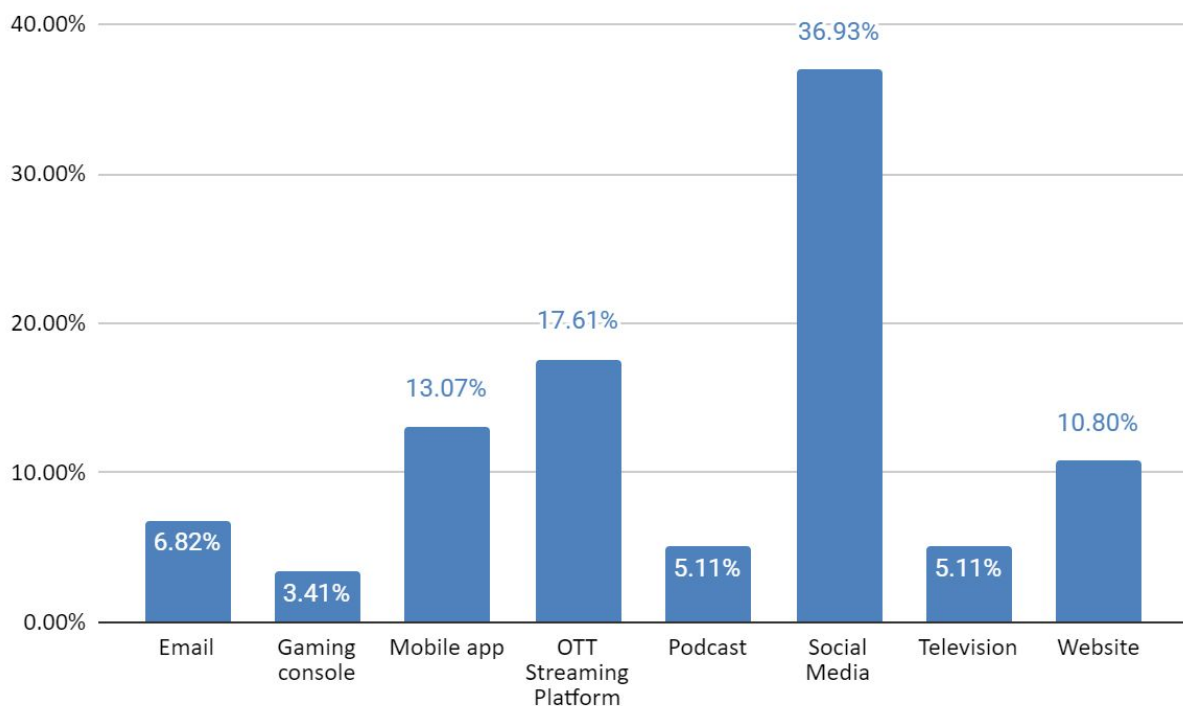
When it comes to the goals of sports organisations, the survey found that growing revenue and income was the most popular objective, with 24% of respondents selecting this option. However, other goals such as growing website traffic, growing social media following, and growing app users were also seen as important by a significant proportion of respondents. (Chat GPT)

David Fowler, iSportConnect:

*“It’s not surprising to see revenue at the top of the fan engagement goals (particularly given the predominance of US respondents in the sample). Growing databases and first party data collection is still way down the list of priorities and is reflective of a challenge facing the industry at large in terms of how to leverage data to drive growth. What is clear is that the most experienced sports organisations in this study have set multiple cross-channel goals and recognise the role of fan engagement at all stages of the marketing funnel”.*

## Most Important Digital Channels

**What do you consider to be the most important digital channels to enable your organisation to achieve its fan engagement goals?**



[Multiple response]

n= 231 (all respondents excluding service providers and agencies / consultants)

The survey also asked respondents to identify the most important digital channels for enabling organisations to achieve their fan engagement goals. Social media once again came out on top, with 37% of respondents selecting this option. Interestingly, streaming platforms, mobile apps and websites were also seen as important channels for fan engagement, with 17.6%, 13.1% and 10.8% of respondents respectively choosing these options. (Chat GPT)

Heikki Rotko, Choicely:

*“This supports the results of other studies, and what we see in our own daily life and work.*

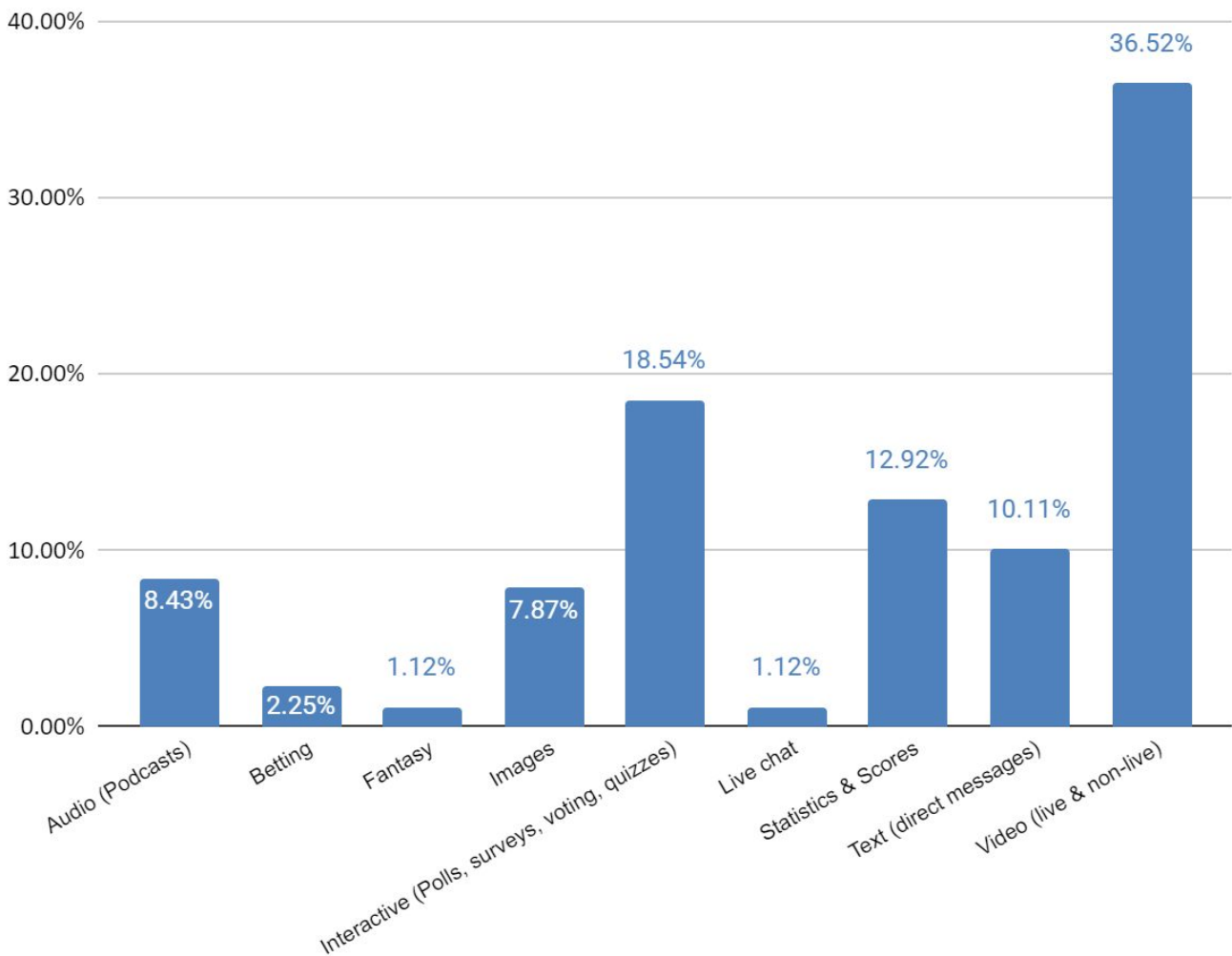
*Practically everyone uses at least one social media platform. According to different studies, people spend up to 4,5 hours a day on mobile apps. Large part of that usage goes to social media apps, but these apps also include other types of apps such as fan engagement apps in the sports context.*

*We believe the share of apps in fans’ time consumption will be even higher in the future, as apps have become more easily deployable for sports organisations of all sizes.*

*Most importantly, fan engagement is a multi-channel effort – the fans aren’t just on one platform.”*

## Most Important Content Formats

**What do you consider to be the most important content formats to enable your organisation to achieve its fan engagement goals**



[Multiple response]

n= 231 (all respondents excluding service providers and agencies / consultants)

In terms of content formats, video (both live and non-live) was considered the most important by almost 40% of respondents. Interactive polls and statistics and scores were also popular options, suggesting that fans are looking for engaging and interactive content. (ChatGPT)

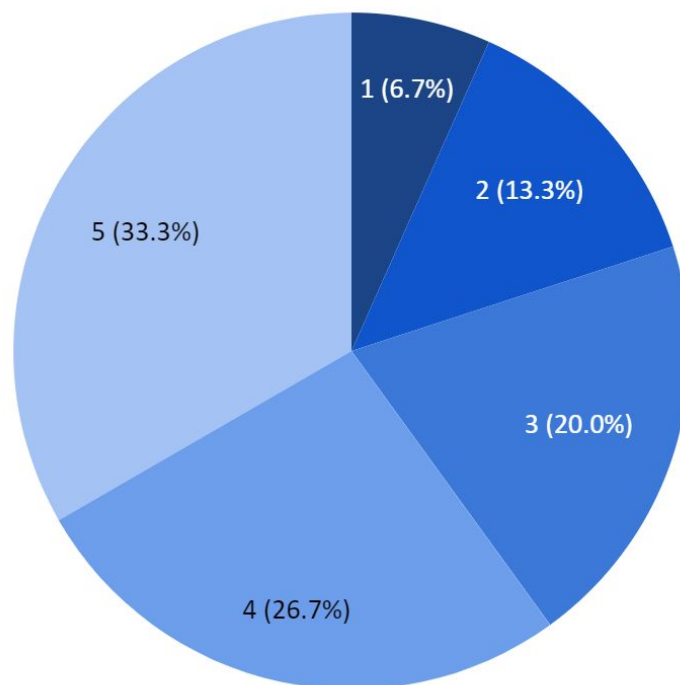
Heikki Rotko, Choicely

*“Sports fans love tangible and interactive content that brings them closer to the other fans and especially the sports, clubs or athletes themselves. Recently, there have even been revolutionary ideas on basing the whole structure of a sports club on fan ownership and fan voting.”*



## Likelihood to Achieve Fan Engagement Goals

**On a scale from 1 to 5 (where 1= we will fail to hit our goals and 5= we will exceed our goals), how likely are you to achieve your current fan engagement goals?**



[Multiple response]

n= 231 (all respondents excluding service providers and agencies / consultants)

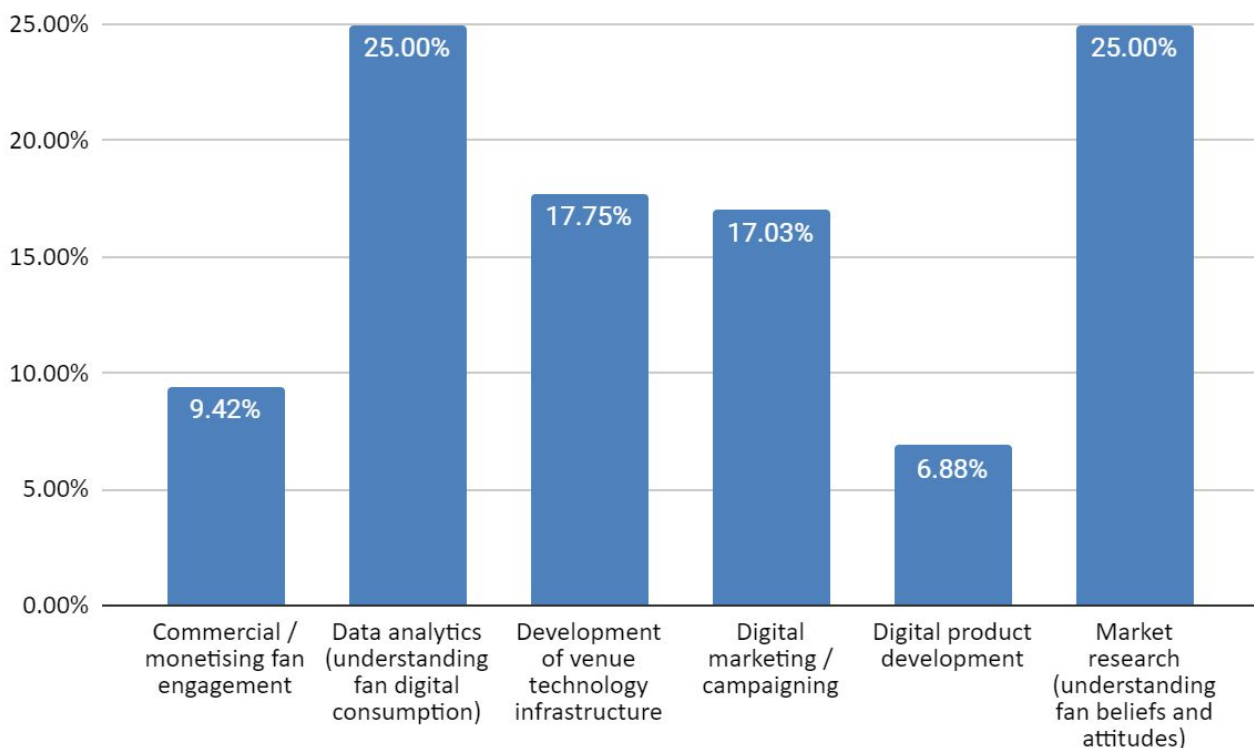
When asked about their confidence in achieving their current fan engagement goals, the majority of respondents (60%) rated their chances at a 3 out of 5, suggesting a cautious optimism. However, a concerning 7% of respondents believed they would fail to hit their goals. (Chat GPT)

David Fowler, iSportConnect:

*“In general there is a positivity from the sample about their ability to deliver on their fan engagement goals. We saw respondents opt for a fairly diverse range of fan engagement goals with many citing multiple, cross-channel and cross-funnel goals. Multiple goals bring with it added pressure and uncertainty in terms of ability to deliver and likely accounts for some of the caution.”*

## Skill and Capability in need

**What skill/ capability is most lacking in the sports business to enable organisations to deliver on their fan engagement goals?**



[Single response]  
n= 289 (all respondents)

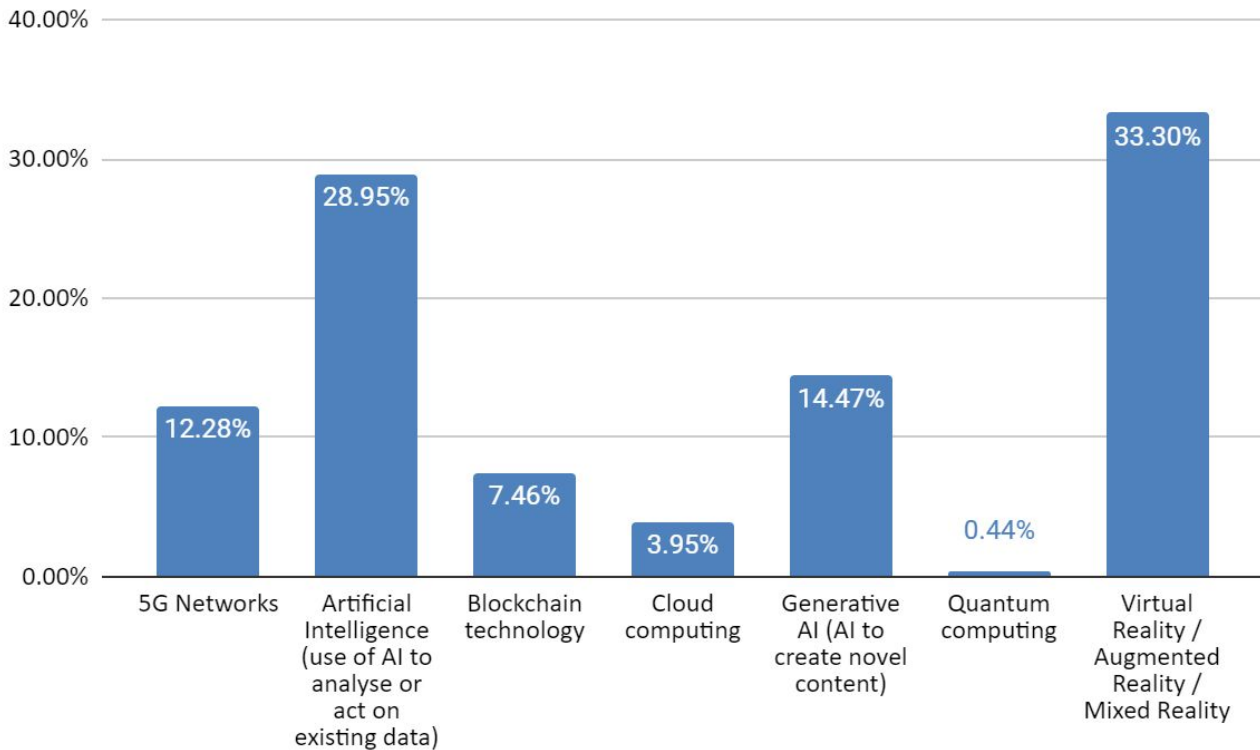
Finally, the survey asked respondents to identify the skill or capability that is most lacking in the sports business when it comes to delivering on fan engagement goals. Data analytics and market research were identified as the most significant areas for improvement, with 50% of respondents selecting one of these options. (ChatGPT).

Heikki Rotko, Chaicely:

*“The importance of data analysis is clear and becomes reinforced with the next graph. Respondents expect AI to revolutionise the industry, and in the end AI is about using and parsing existing data to gain useful insights, and also generate new content.”*

## Most Revolutionary Technology

**What single technology will be the most revolutionary for the field of fan engagement in the next 3-5 years?**



[Single response]

n= 289 (all respondents)

Looking to the future, the survey asked respondents to predict the single technology that will be most revolutionary for fan engagement in the next 3-5 years. Virtual / augmented reality and artificial intelligence were seen as the most likely contenders, with 33% and 29% of respondents respectively choosing these options. (ChatGPT)

Heikki Rotko, Chaicely:

*“Typically data and research are underutilised in organisations. The study shows it applies to sports businesses as well. The use of AI will only accelerate, also in the sports business and in the way organisations engage with fans.”*

## About the Authors of the Report

iSportConnect partnered with Choicely to design and run this unique survey as well as to produce the report.



**iSportConnect:** iSportConnect was founded in 2010 and is the world's largest private sports business network. iSportConnect helps stakeholders across the sports business to solve pain points and learn from peers through its unique events, content and advisory services. The business works with an exclusive group of best-in-class partners who it helps to navigate the complexities of the sports business.



**Choicely:** Choicely is a software company that provides businesses with mobile apps built without coding. With Choicely's mobile app builder, anyone can build and maintain an app, cutting development costs and enabling agile changes to the app. Choicely is based in Finland and Switzerland and currently serves businesses across over 40 countries. Sports is among Choicely's key industries, with customers like Arsenal Fan TV, International Judo Federation, and Finnish Gymnastics Association in the roster.

### To learn more about iSportConnect

Contact Kat Harhun via [kat@isportconnect.com](mailto:kat@isportconnect.com) or go to [www.isportconnect.com](http://www.isportconnect.com)

Follow them on [LinkedIn](#) and [Twitter](#)

### To learn more about Choicely

Contact Heikki Rotko via [heikki@choicely.com](mailto:heikki@choicely.com) or go to [www.choicely.com](http://www.choicely.com)

Follow them on [LinkedIn](#), [Instagram](#), [Twitter](#) and [Facebook](#)

Want to see how a high-quality fan engagement app can be built in 2 weeks? [Book a demo](#), and they will show you around their no code mobile app builder.