

DIGITAL FANS



DIGITAL FANS. EUROPEAN SPORTECH MARKET ANALYSIS 2024-2028



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INTRO



01

SPORTS, THE MOST ANCIENT ENTERTAINMENT

Sport has been an integral part of society since the earliest times. In ancient Greece, the Olympic Games were established as early as 776 BC and are believed to have been held every four years on nearly 300 occasions¹, becoming a mainstay of Hellenic culture. The Romans, meanwhile, enjoyed gladiator games, chariot races, and other physical competitions that were both a show of skill and a spectacle for the masses.

Today, interest in sporting activities remains strong. More than half of the world's population practices or follows a sport closely, as well as the activity performed by their favourite athletes. In sports, competition serves as a mechanism for recognizing excellence. People congregate in stadiums, in front of televisions and on streaming platforms to watch professional athletes compete at the highest level. This spectacle of sport continues to serve many of the same functions it did in ancient times:

it provides entertainment, allows individuals and teams to excel, and allows cities and countries to project their power and status.

In this ecosystem, fans play a vital role in driving the popularity of professional sports in our society. Fans are the primary driver of the sports economy, funding the industry by purchasing tickets, merchandising and subscriptions to audiovisual services. These revenues, in turn, enable leagues and teams to develop talent and expand and improve infrastructures by providing high-quality sports content.

In addition, sponsors and advertisers, aware of sports fans' vast reach and loyalty, invest heavily to be part of this industry. This includes sponsorship agreements, advertising in stadiums and during broadcasts, and promoting products and services through players and teams.

Thus, the engagement of fans, as well as their spending of time and money, are the main drivers that make sports a thriving business.

Although the athletes are centre stage, the fans are essential to the sports experience. Their passion, loyalty and interaction with the sport differentiate the game from professional competition. That enthusiasm is what keeps the sports business machine running.

Fans today have a vast supply of sports content distributed across digital platforms. This increasingly sophisticated media landscape can both negatively impact the sense of community of the future generation of fans and be an incredible opportunity to multiply connections.

Cyrille Thivat
CEO AT TELECOMING



“From the packed stadiums of North America to the vibrant cricket grounds of the Indian subcontinent, the passion for sport is a thread that connects humanity across geographical and cultural boundaries”.

¹*Olympic World Library*

FANS



02

46% OF THE WORLD'S POPULATION LOVES SPORT

Sport is much more than just a game. It is a passion shared by thousands of people and generates loyal communities. Around the world, sports fans unite to celebrate, suffer and live each sporting event to the fullest. Year after year, the global sports family continues to grow, bringing people of all ages, backgrounds and cultures together in a unique form of international engagement.

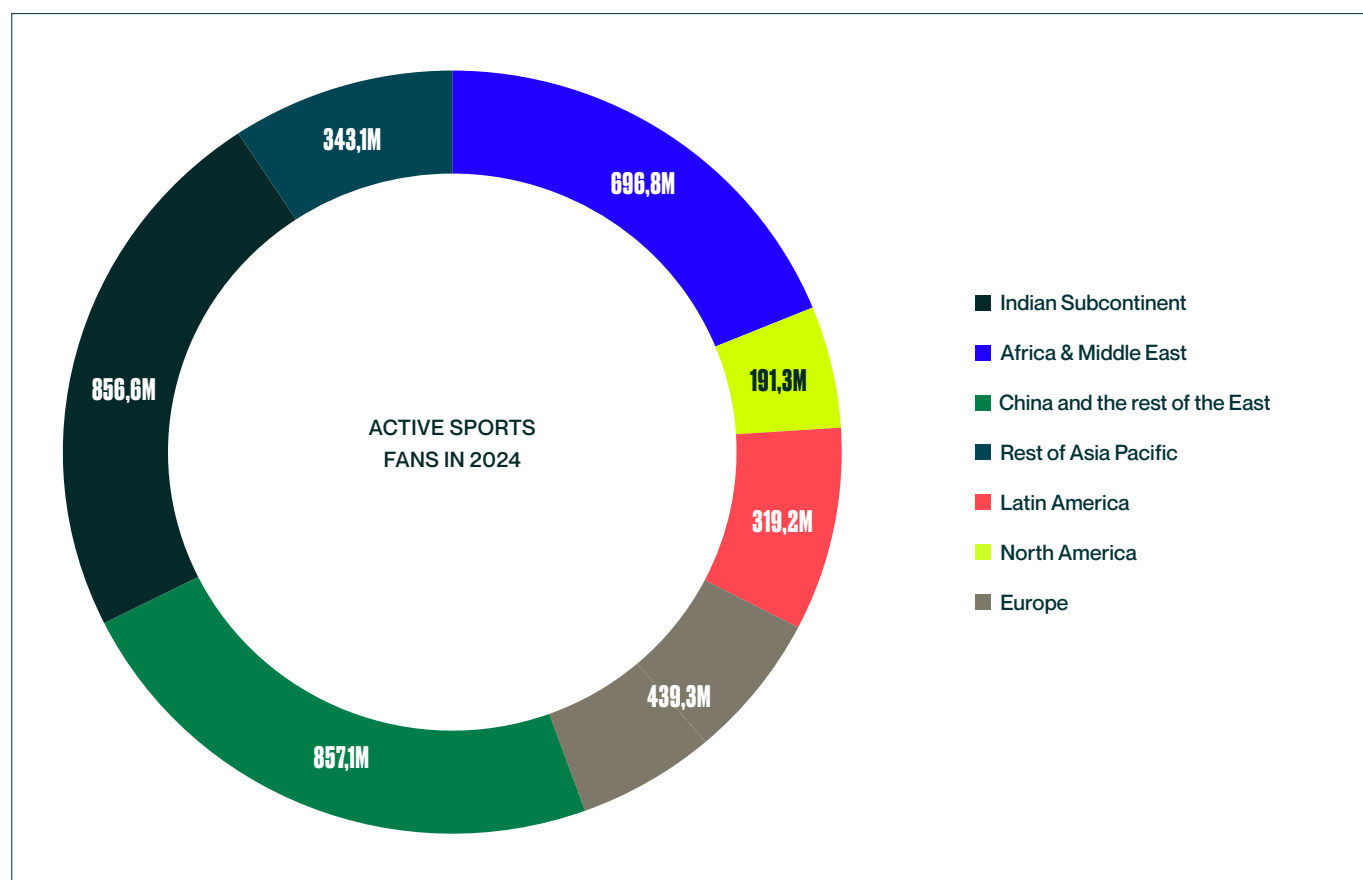
The attractiveness of sport is becoming unquestionable. Some of the great powers

granted to this industry are the mobilization, promotion and representation of nations and values capable of eliminating physical, cultural, and socio-economic boundaries. The worldwide popularity of sports allows fans to connect with a powerful platform of communication and social transformation.

While some territories have experienced a steady growth in fans, others have seen an exponential increase.

The global number of sports fans will grow from 3,703 million in 2024 to 3,904 million in 2028.

China will host the most significant number of active sports fans in 2028, with more than 726 million, followed by India (660 million). In terms of growth, Africa and the Middle East will see the most significant increase in active fans between 2023 and 2028 (+11%) to 774 million in 5 years.



Europe, passionate about sports

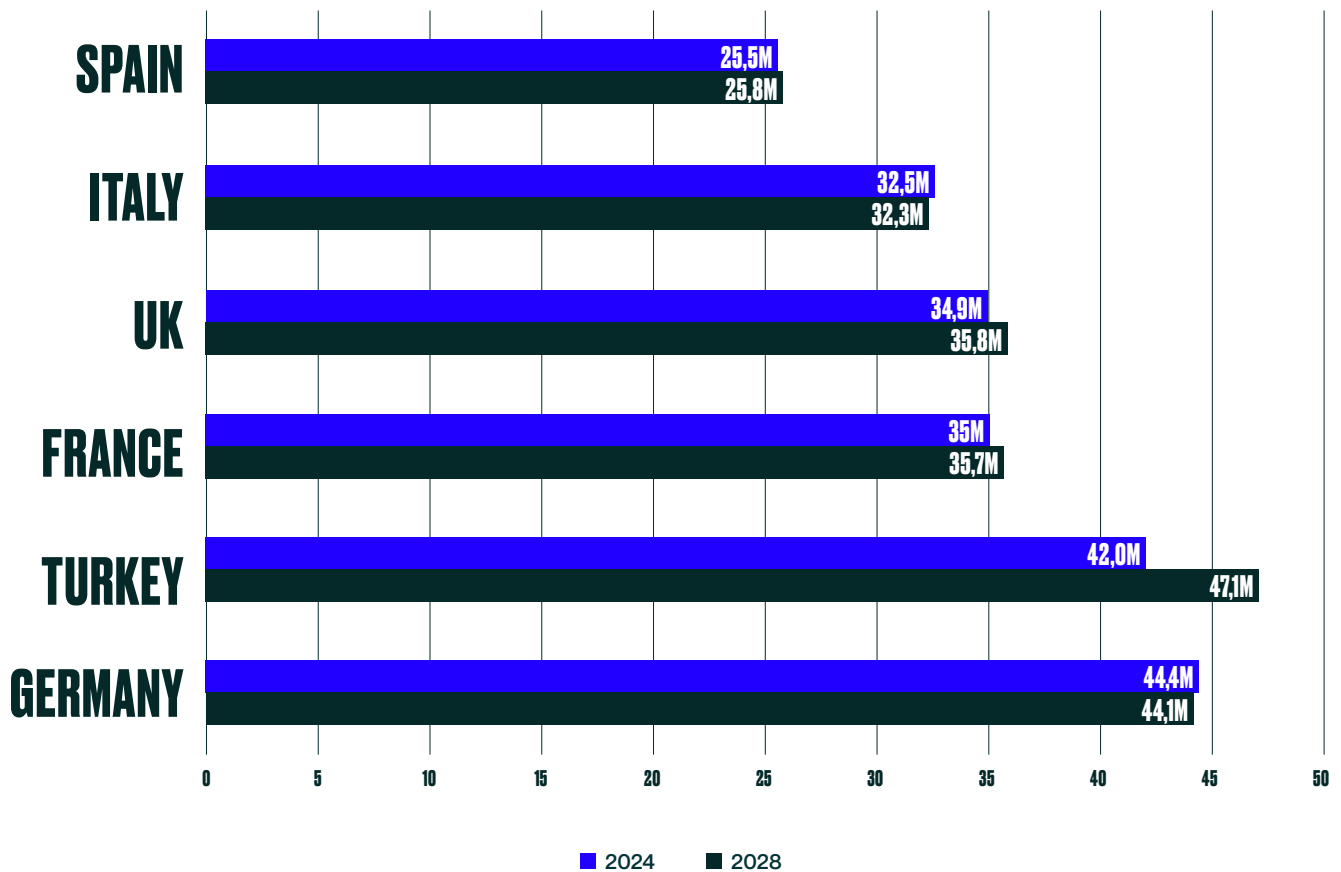
The number of active sports fans in Europe will exceed 439.4 million in 2028, accounting for 11% of the global fan community. The fastest-growing countries will be Turkey, Ireland, Sweden and Norway.

In Europe, the favourite sports are soccer, basketball, tennis and cycling.

Soccer is king, followed by millions of people across the continent. Basketball is especially popular in Eastern European countries. Tennis is in third place, a speciality watched by a broad European age range. Behind it, cycling is Europe's fourth most popular sport, especially among active fans who follow the activity and practice it assiduously.

Germany, Turkey, the United Kingdom, France, Italy and Spain are the most significant European markets for sports fans. However, it is expected to stabilize slightly over the next five years with other regional countries.

TOP EUROPEAN COUNTRIES WITH ACTIVE SPORTS FANS



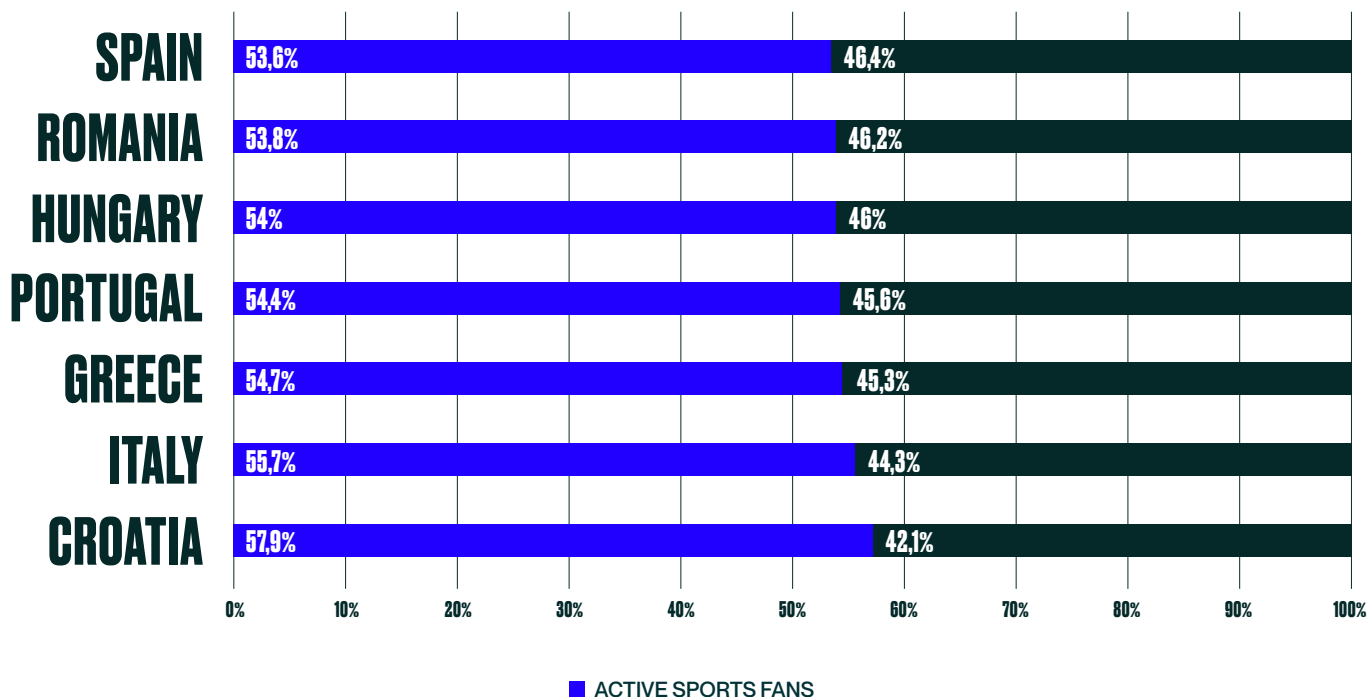
Turkey is the country at the top of the list regarding growth in the number of sports fans. In addition to the overall demographic growth, the interest in sports is a fact: the Turkish country will grow in active sports fans by 12% over the next four years, from

42 million enthusiastic sports fans in 2024 to 47 million in 2028.

The quality of fan engagement is measured by active participation with the club's brand, such as attendance at matches, purchases,

interaction on digital platforms, etc. While sports are an integral part of the lives of Europeans and a factor of social and cultural bonding, the penetration of fans over the total population differs from country to country.

PERCENTAGE OF ACTIVE SPORTS FANS OVER THE POPULATION IN 2024



The country with the highest percentage of active sports fans in Europe is Croatia, with 57.9% of its population, followed by Italy, with

55.7%, Greece with 54.7%, Portugal with 54.4%, and Hungary, Romania and Spain also show high percentages close to 54%.

These countries exhibit a robust sports culture and a significant love of sports.



LIKES



03

FANS ARE WILLING TO SPEND MORE IN THE DIGITAL ENVIRONMENT

Cyrille Thivat
CEO AT TELECOMING



“We consume more content than ever. Digital is gaining more and more followers, and sports properties see it as an opportunity to expand their fan communities. Creators and brands have long incorporated digital tools to transform this scenario into a new revenue stream.

Over the last decade, we have seen significant changes in the distribution and growth of content consumed by sports fans. It is exciting to be part of this ecosystem”.

Fans purchase t-shirts, hats, scarves, and other items with the team logo or colours to show their support for a specific team or athlete. Sports-related purchases allow fans to identify with a community of people with similar interests and feel a stronger connection to other fans.

Some sports items, such as stickers, autographs and signed jerseys, can be valuable to collectors and have a high value and frequent consumption.

Fans are willing to increase their average spending for experiences like watching their favourite teams play live.

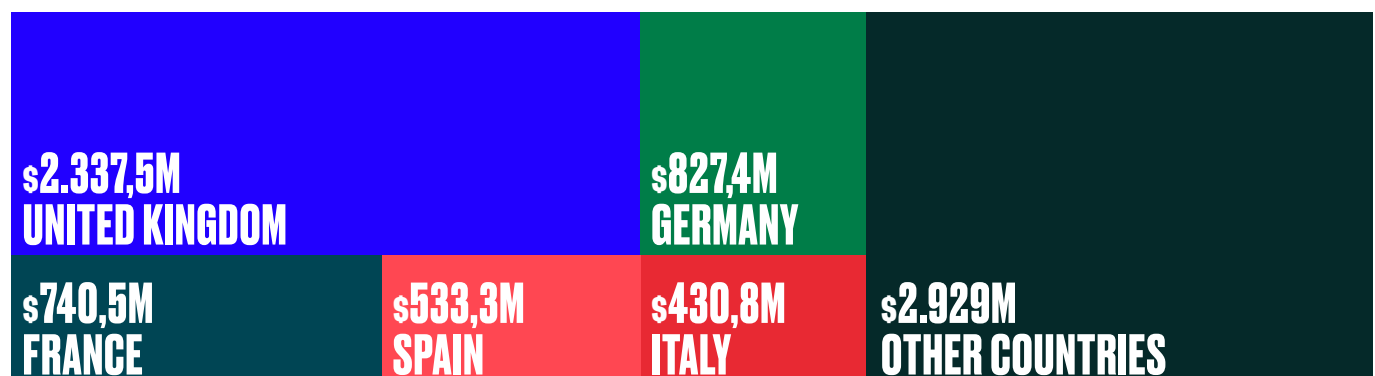
In 2024, Europeans will spend nearly \$7,865M on digital sports, accounting for 14% of global spending. It is estimated that by 2028, it will reach \$13,398M, representing a growth of 70%. In Spain, spending on digital sports entertainment will be \$538M in 2024, reaching \$852M, with an average annual growth of 12% over the next five years. Spain accounts for almost 7% of European digital sports entertainment spending.

In Europe, ticket prices for soccer matches can be very high, considering that this continent registers the best competitions worldwide, followed by many fans worldwide.

This phenomenon is due to the historic soccer clubs in Europe that have positioned their brands among the most valued in the world. The brands of clubs such as Real Madrid CF or Manchester United are part of the culture and identity of the nations from which they originate.

UK has the highest spending on digital sports entertainment in 2024, with \$2,371M. Germany is in second place with \$850M, followed by France (\$744M), Spain in fourth place (\$538M) and Italy, which will spend \$433M on digital sports entertainment.

TOP 5 COUNTRIES THAT SPEND THE MOST ON DIGITAL SPORTS IN 2024



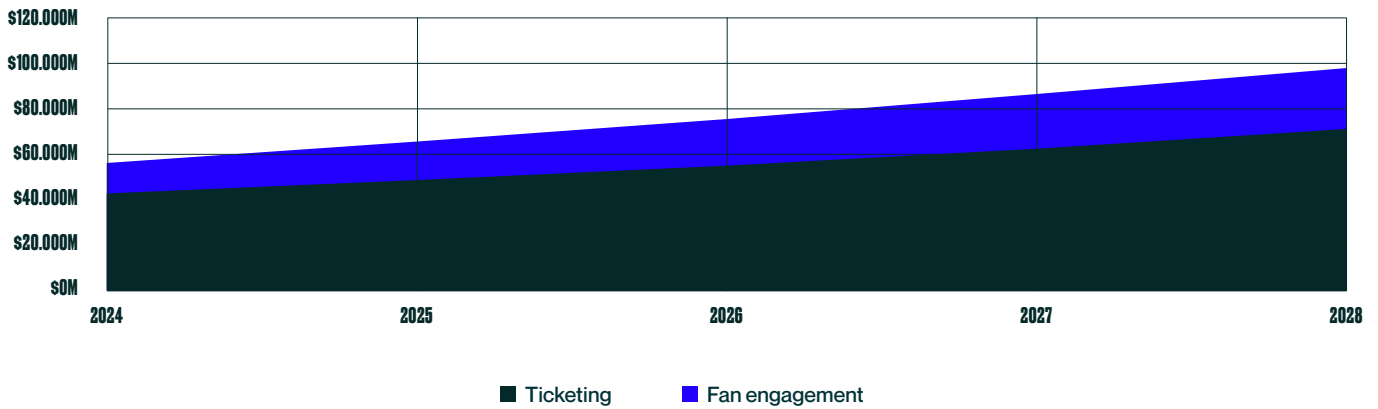
Evolution of sports fan digital consumption

The challenge facing the sports industry is to define a business model for new audiences and modern fans. The proportion of sports fans purchasing on digital

platforms is expected to grow steadily from 2024 to 2028. This increase reflects the growing adoption of technology to make purchases on digital platforms because of

the convenience and accessibility for the user.

TOTAL VALUE OF DIGITAL SPENDING ON SPORTS WORLDWIDE



Digital spending in the sports sector is experiencing remarkable growth. From 2024 to 2028, consumption on digital sports platforms, encompassing ticketing and fan entertainment, is expected to increase significantly. In particular, fan spending on digital engagement services shows a steeper growth curve than ticketing, indicating the growing interest in interactivity and digital experience in sports. This

sustained increase indicates an industry adapting to accelerating digitization and the demands of an increasingly connected fan base.

Digital services have made it easier for fans to follow their favourite teams and athletes. Watching games live, checking stats, and interacting with other fans is now done from

home, outside the stadium or even on the go.

One of the leading causes of the growth in the consumption of sports content on digital platforms versus traditional media is the interactive experience offered by brands, which completely changes sports entertainment.

David Murillo
PRODUCT DIRECTOR AT TELECOMING



“Through mobile technology, fans evolve from passive spectators to dynamic participants, forging deeper connections with their beloved sports. They engage in fantasy leagues, vote in interactive polls, and join real-time conversations about game outcomes.

This shift to active engagement not only enriches the fan experience but also strengthens their loyalty to teams and athletes, making every match a more immersive and interactive event”.

In this line of loyalty and recurrence, digital platforms work on offering personalized content based on the preferences and behaviours of users.

Exclusive content brings users closer to their favourite sports brands. Interviews with athletes, training videos, and behind-the-scenes tours of stadiums engage fans and increase their spending on digital services.

Global sports digital spending will grow from \$57,760M in 2024 to \$101,353M in 2028, representing growth over the next few years of 76%. Europe will account for 14% of this spending in 4 years.

The digital sports market has been divided into two main categories in this analysis:

> SPORTECH FOR TICKETING (DIGITAL TICKETING):

Digital ticketing for sporting events is witnessing steady growth from 2023 to 2028. This development is evidence of a continued adaptation of consumers to digital platforms and a growing preference for online transactions due to an evolution in the purchasing practices of sports fans. It is also a clear sign of ongoing digitization in the sports industry. The value of the digital sports ticketing market will grow from \$43,227M by the end of 2024 to \$71,128M

in 2028, representing an average year-on-year growth of 13% globally.

> SPORTECH FOR FAN ENGAGEMENT (OFFICIAL PRODUCTS AND SERVICES):

Services to strengthen users' connection with other fans and their favourite brands and athletes are a reality. Thanks to the application of technology in the sports field, sports brands have more information about their fan communities. Fan engagement spending refers to this relationship between audiences, engagement and content monetization, which in the sports industry shows an impressive progression (year-on-year rate of 20%) and will increase from \$14,534M in 2024 to \$30,225M in 2028.

Cyrille Thivat
CEO AT TELECOMING



“The sports industry is determined to strengthen its digital connection with its fans by investing in platforms and strategies that facilitate more profound and personalized interaction between clubs and their fan bases. The younger fan base drives increased spending due to their established online consumption habits and commitment to the mobile experience”.

The evolution of sports fan spending between 2024 and 2028 is attributed to increased active fans in already popular competitions and new followers joining emerging competitions that are beginning to spread, such as women's soccer gaining prominence or contact sports with increasingly popular competitions such as UFC and EFC. When competitions or sports teams gain popularity, spending on these brands increases and vice versa.

Sports organizations that continue to invest in digital platforms will be able to provide fans with engaging ways to support their favourite teams and sports.



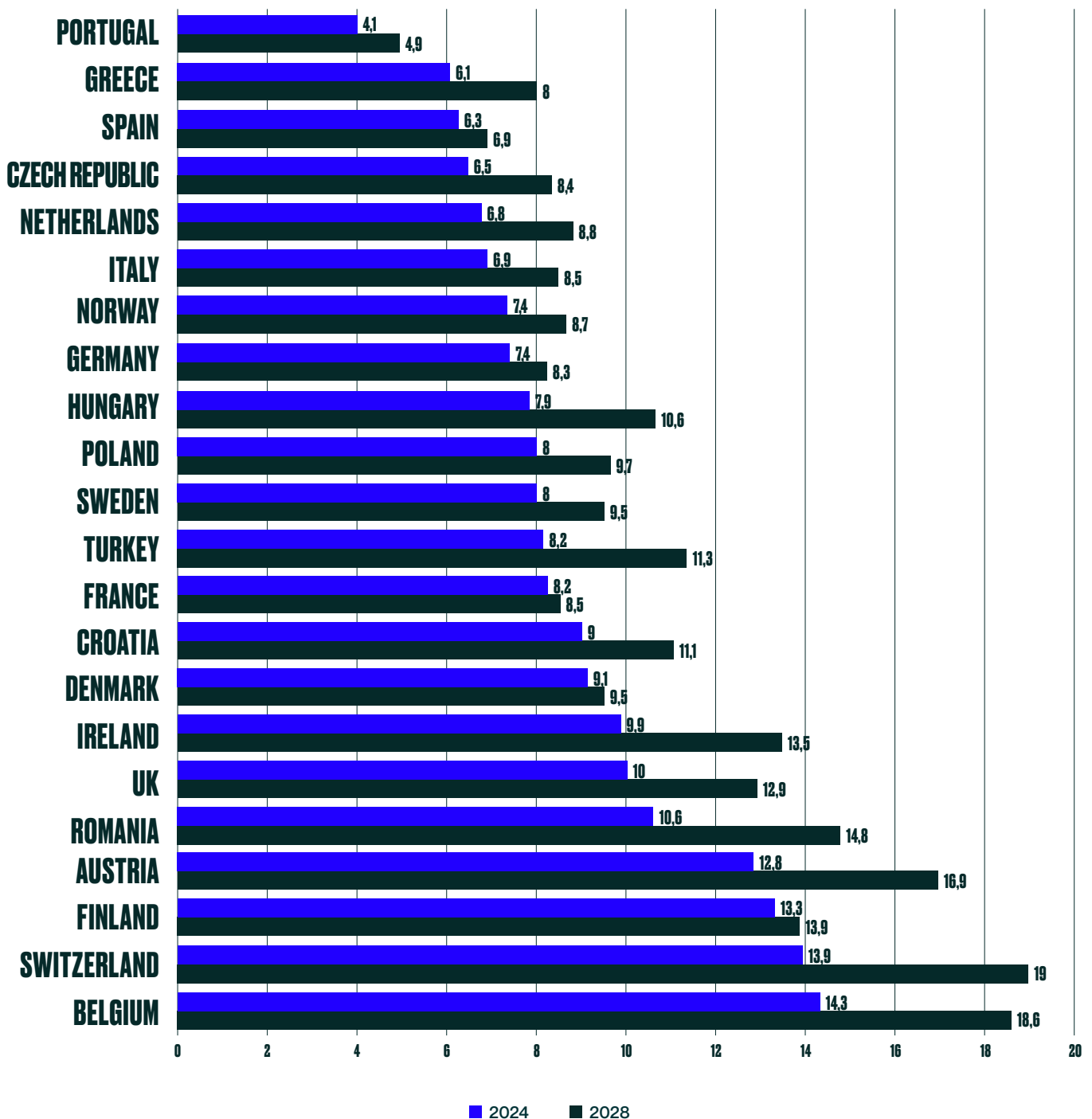
Beyond ticket sales, Europeans spend €2,300M annually to support their sports teams through digital platforms

The digital sports market is expected to grow in Europe in the coming years. Spain is in a

favourable position to take advantage of this increase in the active fan community, as it has

a strong sports fan base and a well-developed and globally positioned sports industry.

AVERAGE NUMBER OF BRAND-RELATED PURCHASES PER ACTIVE FAN

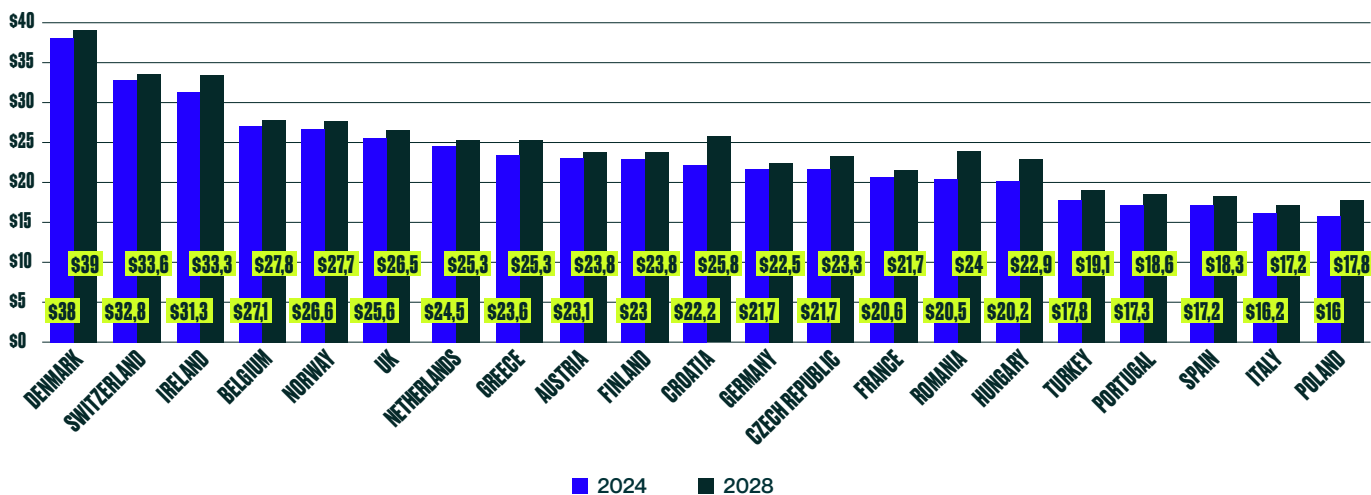


Belgium (14.3), Switzerland (13.9) and Finland (13.3) are the countries with the highest number of annual purchases per active fan.

In most European countries, average spending by sports fans on sports brand-related purchases is expected to increase

between 2024 and 2028.

AVERAGE EXPENDITURE PER PURCHASE ON OFFICIAL PRODUCTS AND SERVICES



Europeans spend \$196 per year to support their teams. The average ticket per purchase related to a sports brand will increase by 6% in Europe between 2024 and 2028. Denmark and Switzerland will have the highest average spending in 2023 and 2025. Romania and Croatia are the

countries that will have the highest growth in the average annual ticket per purchase from sports brands in 2028. (+17%).

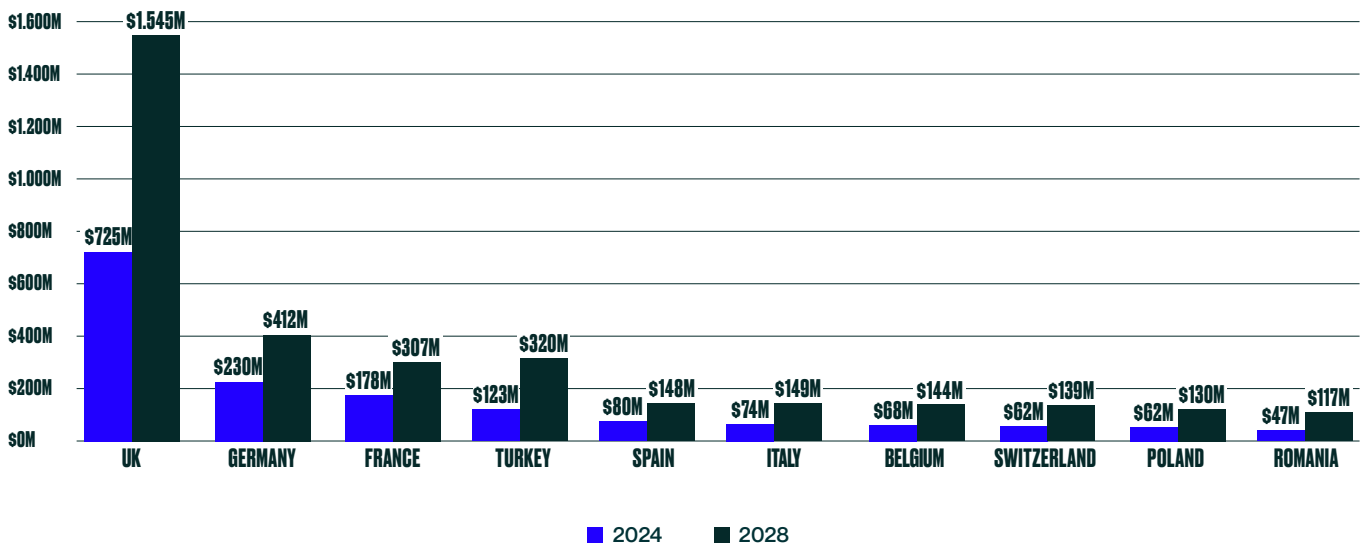
whereas the European average is around \$24 annually. In the next four years, the average ticket in official digital services is expected to exceed \$25 in Europe and \$18 in Spain.

In Spain, fans spend an average of \$17 per purchase on official digital platforms,





TOTAL FAN SPENDING ON BRAND-RELATED PURCHASES - TOP 10 EUROPE



The digital sports industry is growing steadily and quickly in Europe. Total spending on brand-related purchases by sports fans in Europe will increase from \$2,314.9M in 2024 to \$4,817.7M in 2028.

With spending of \$724.6M in 2024 and \$1,545.3M in 2028, the UK leads consumption on official sports digital platforms. This is due, among other things, to its strong sports culture, high internet penetration, and robust economics, with a high average ticket per user allowing consumers to spend more on these services.

Germany and France also show significant spending, although much lower than the UK. Turkey is the fastest-growing region, reaching \$319.7M in 2028 out of an estimated \$123M by the end of this year. This represents a year-on-year growth of 27% over the next four years. Turkey is one of the youngest nations in Europe; 39% of the population is under the age of 24, which generates a very dynamic market. As these young people become consumers, they drive commerce through digital channels and smartphones². The Turkish market will overtake France in 2028 to become Europe's third largest sportech market in fan engagement.

Romania also has a high growth rate, at 26%. It is also an emerging market with a growing interest in sports and rapidly adapting to new digital offers among its users. These countries, along with Ireland and Hungary, could represent good market opportunities for brands and sports teams looking to expand in the digital environment.

Countries with more established sports industries, such as the UK, Germany and France, still show considerable growth (between 15% and 21%). Denmark and Finland have the most moderate growth rates, at 14% both of them.

² Our World in Data

The generational shift in Europe is transforming how sports fans consume content

The growth of the global sports fan market is driven by digitalization, which allows us to connect from anywhere to watch live or defer the highlights of the last Champions League match or the whole match. However, new generations no longer consume sports content in the same way as before.

They are not as interested in the timing of a full match and demand content that is immediately accessible from wherever and whenever they want. In addition, they are looking for the main events in short-form or highlights, with a parallel interest in live broadcasting. These short-form contents

are mainly consumed via mobile devices and shared with other fans.

David Murillo
PRODUCT DIRECTOR AT TELECOMING



“The primary interest for these fan communities is interaction with their favourite sports brands and competition results. For a sports fan, the experience is no longer limited to watching the entire match; it starts before, continues after and adds interaction during the game.

The development of Sportech will drive the fan engagement of significant sports clubs to reach all fans worldwide. Mobile services have a way to go because dual-screen consumption is a reality. From features to native payments, younger users demand 100% mobile experiences”.



TOP COUNTRIES WITH THE HIGHEST GROWTH IN TOTAL FAN SPENDING
ON DIGITAL PURCHASES OF OFFICIAL SPORTS PRODUCTS AND SERVICES

	2024	2028	2024-2028 GROWTH
TURKEY	\$122,9	\$319,7	160,2%
ROMANIA	\$46,9	\$117,2	150%
IRELAND	\$23	\$55,1	140%
HUNGARY	\$17,4	\$41,4	137%
SWITZERLAND	\$62	\$139,5	125%

The sports fan base remains strong, with many passionate fans looking to personalize their sports digital experience. Generation Z fans, in particular, seek social experiences in their sports consumption, using social networks and desiring interactive features on streaming services, which are increasingly used to watch sports. In addition, many fans are willing to pay more for a streaming service that offers all the sports they want to watch in one place.

According to Deloitte, the global sports technology (sportech) market will reach \$100,000M by 2025. This figure includes many products and services, such as mobile apps, live match streaming, social networks, and virtual and augmented reality.

Technology plays an increasingly important role in how sports fans demonstrate their passion. Mobile apps are one of the key trends transforming sports fans' experience in Europe. They offer fans various

functions, such as news, analysis, statistics, schedules, results, live streaming, sports betting and communities.

Globally, 41% of sports fans watch sporting events through OTT services and digital content providers. Notably, many of these viewers also watch traditional TV broadcasts simultaneously, confirming that digital platforms complement rather than replace traditional viewing methods³.



³Nielsen



Changes in consumer behaviour are redefining the way fans enjoy sports. The official apps of soccer clubs and major sports leagues offer an enriched experience for their users. FC Barcelona, Real Madrid, Manchester United and Liverpool, each with millions of followers, provide instant access to news, live scores, match schedules, detailed statistical analysis, video content and a merchandising

store. Meanwhile, giants such as the NBA, NFL, MLB and NHL not only share these functionalities but also offer live streaming of games, pushing the boundaries of sports entertainment. In addition, some of these platforms increase fan loyalty with games and contests and even allow direct interaction with players, redefining the fan experience in the digital era.

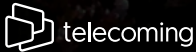
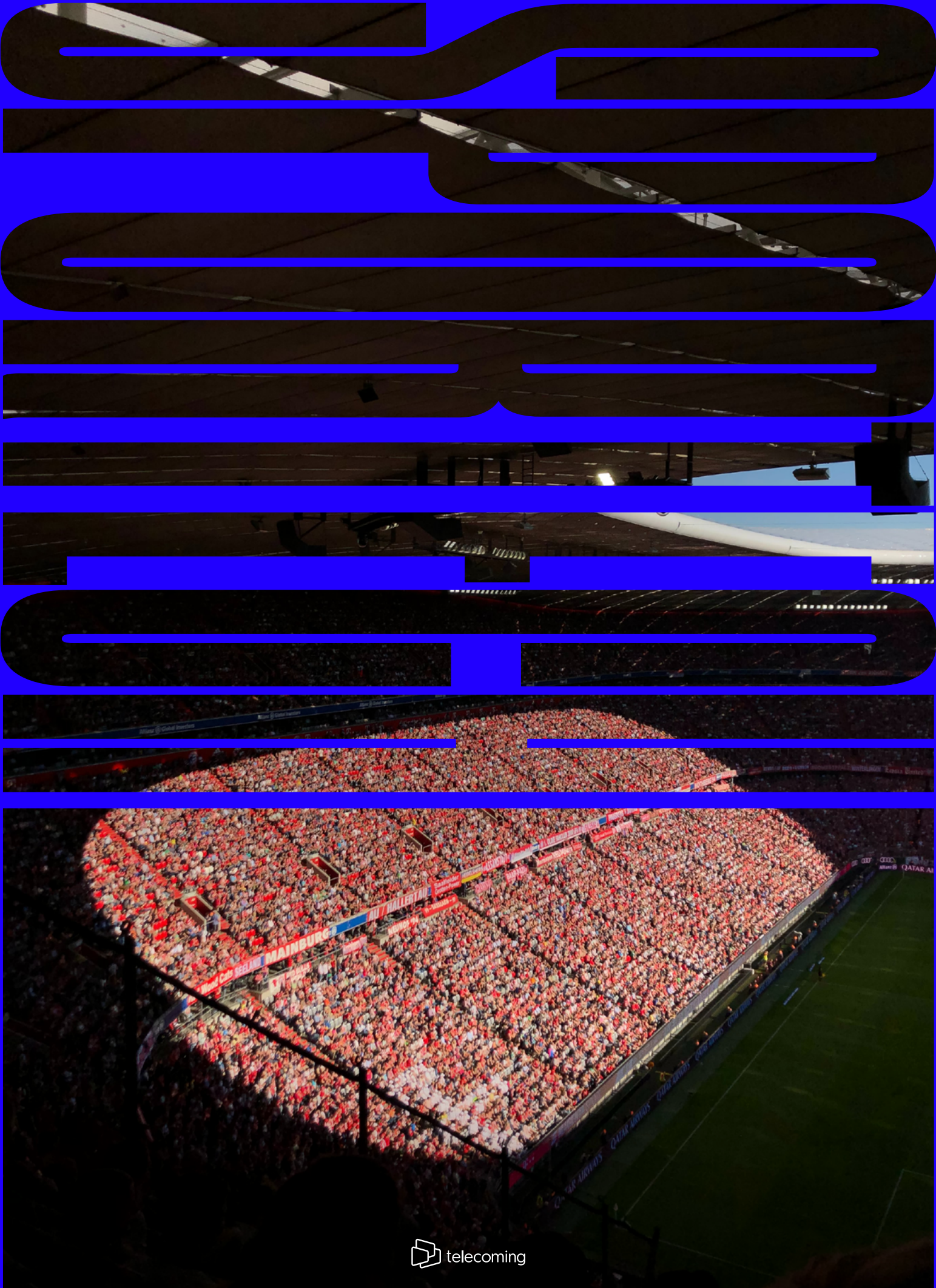
Some of the fan engagement solutions that are transforming the sports industry include the implementation of loyalty programs. These models reward fans for purchases and social media interactions and referrals, with rewards such as unique experiences, NFTs or limited edition items.



75% of European sports fans use mobile apps to follow their favourite teams and players.

50% of European sports fans watch live games via streaming.

40% of European sports fans use social media to interact with other fans.



DIGITAL FANS. EUROPEAN SPORTECH MARKET ANALYSIS 2024-2028