



COPA90

# The Modern Football Fan

## WHAT MAKES THEM TICK?

An exploration of their behaviours, their values, their motivations



# Today's **football** fans have **come of age** in a paradoxical environment...

On the one hand, they are priced out of the live game. On the other, the proliferation of social platforms has given them unfettered access to football content and players.

This paradox inspired COPA90 to explore what makes the modern football fan tick - their behaviours, their values and their motivations.

To do this, we have focused on those fans now transforming the football landscape - fans aged between 16 and 24 - to capture the demographic and attitudinal factors that will shape the future of the beautiful game.

Meet the 'Modern Football Fan'.

ON THE FOLLOWING PAGES, we highlight the 15 major shifts and changes in football fandom that tell how this new generation of fan relates to and is changing football.

The fan insights we present were sourced during February 2018 via a variety of proprietary quantitative, qualitative and video diary methodologies and further validated by secondary research.

Our study is intentionally 'NEUTRAL' - focused on young fans, irrespective of their awareness of COPA90.





# Executive Summary



## WHAT'S HAPPENING?

A new generation of fans is relating to and changing the game of football in many new and surprising ways.



## WHO'S DRIVING THIS?

These young fans are a generation priced out of the live game. Yet thanks to the proliferation of social platforms, they enjoy greater - and closer - access to football content and players than any generation before them.

Aged 16 to 24, their behaviours, their values and their motivations are now transforming the Modern Football landscape.



## THE MODERN

### FOOTBALL FAN:

## K E Y FEATURES

The Modern Football Fan inhabits a landscape in which traditional TV sports broadcasting is in decline, and platforms are in the ascendant.

These fans are worldly, culturally

curious and passionate - about

football, yes, but also (coming a close second): **music and gaming.**



Gaming has provided them with an education - creating a

new fan perspective that blurs the line between reality and virtual, and between the local, national and international game.



## ALL CHANGE: 5 KEY WAYS THE MODERN FOOTBALL FAN IS CHANGING FOOTBALL

**I** With their content consumption driven by immediacy and mobility, Modern Football Fans are accelerating a shift in the balance of power within football - away from traditional media formats that encourage passive lean-back consumption in favour of active participation, with fans themselves taking a driving seat in creating and distributing content.

**II** Modern Football Fans are also driving a shift away from old voices of authority towards younger, culturally more diverse and multi-faceted commentators.

**III** By pulling in a patchwork of perspective during games via an extended network that adds texture to their viewing of the game, Modern Football Fans are building the importance of differentiated opinion - and its positioning as an antidote to a shift towards algorithmic control in other aspects of daily life.

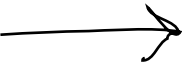
**IV** Modern Football Fans preferred social safe havens - notably, WhatsApp - have become the epicentre of a new form of football conversation increasingly characterised by a new tone with memes not just enhancing but becoming the game's modern language.

**V** By more actively creating and distributing their own content, Modern Football Fans have spurred on players to hand over greater control to their audiences - like any good social brand nowadays.

**In these ways and more, Modern Football Fans are posing major challenges and new**

**opportunities the rest of us must now meet.**

# cONtents



CONTENTS

**8-9** THE BROADCAST CONTEXT

10-15 THE FAN CONTEXT

**16-19** NARROWING THE US/EU DIVIDE

20-25 NEW BASTIONS OF POWER

26-31 **AN EVER EXPANDING** FOOTBALL UNIVERSE

32-33 NEW VOICES OF AUTHORITY

**34-39** YOU’LL NEVER WATCH ALONE

40-43 DARK SOCIAL CIRCLES

44-47 MEANING IN MEMES

48-49 CURATING **+** CREATING FOOTBALL CLOUT 



50-55 PLAYER BRANDS ON THE RISE

**56-59** SECOND TEAM FOOTBALL FIX 60-61 FLUID IDENTITY CONSTRUCTION

**62-65** THE RISE OF FAN-ALYSTS

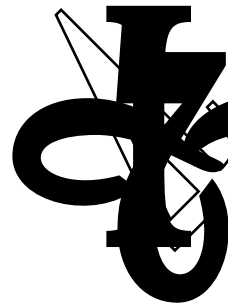
66-71 *BLURRED LINES* (BETWEEN VIRTUAL & PHYSICAL)

72-75 ONLINE GAMING & eSPORTS

76-77 **A PARALLEL UNIVERSE: YOUTUBE FOOTBALL TEAMS**

78-81 THE FEMALE GAZE

82 CLOSING THOUGHTS



# The Broadcast Context



Today's modern football landscape is defined by the declining influence of traditional TV sports broadcasting.

Increasingly, sports broadcasting rights are going to non-traditional media sources – for example, Premier League highlights end up on Twitter, the 2017 Champions League Final was viewed on YouTube, and MLS is found on Facebook.

**With the exponential rise in over-the-top distribution (OTT), digital powers like NETFLIX and AMAZON are now rewriting the rules for mass market content.**

This means it is only a matter of time before these digital players also muscle in on sport and football.

As a result, we are on the cusp of a new era of live football broadcasting and, in this landscape, a new breed of fan is emerging.

Meet the 'Modern Football Fan'.

Q:

Which of the following threats should the sports industry be most concerned about?

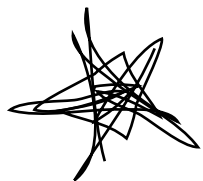
a:

**Sky's Live TV** viewing figures **dropped** **14%** over the 2016/17 season. (Source: The Financial Times)

**TWITTER** has signed a deal to live stream select Thursday night NFL matches. It will also stream **31+** major golf tournaments online, free of charge after securing the rights to broadcast the entire PGA Tour. (Source: Mediacom)

**57%** of sports industry leaders cite the shift in consumer behaviour of younger generations as the 'top threat faced by the industry'. (Source: PWC)





# THE FAN CONTEXT

The Modern Football Fan



# Our research points to the emergence of a distinctive new generation of football fan aged 16 to 24 years old: the 'Modern Football Fan'.

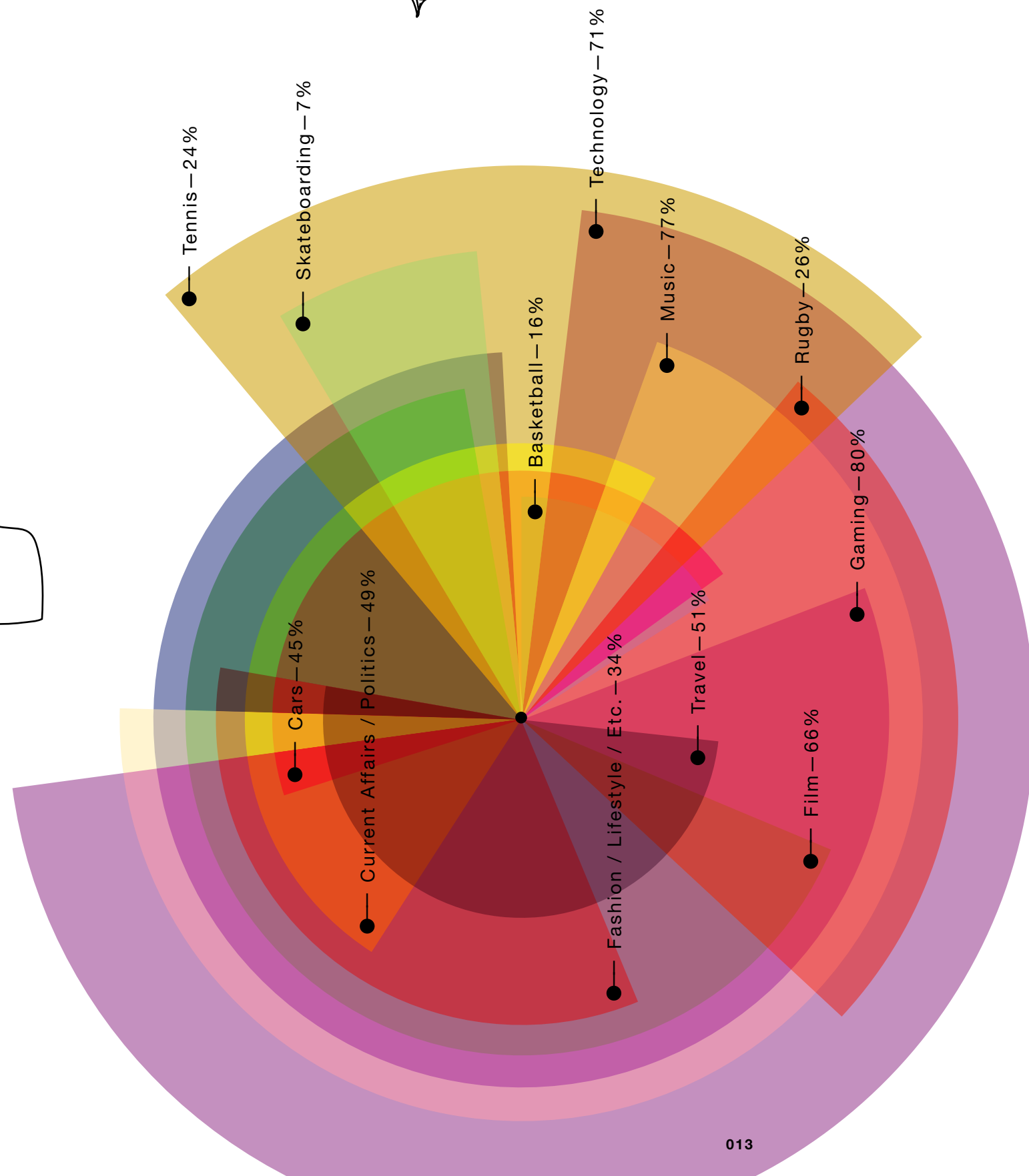
**The Modern Football Fan is worldly, culturally-curious and passionate.**

And the things they are passionate about are no longer lived and loved in isolation from each other thanks to the unifying impact of social media where content around their differing interests is pooled into the same feeds.

It goes without saying that the Modern Football Fan is passionate about the beautiful game. But music and gaming come a close second.

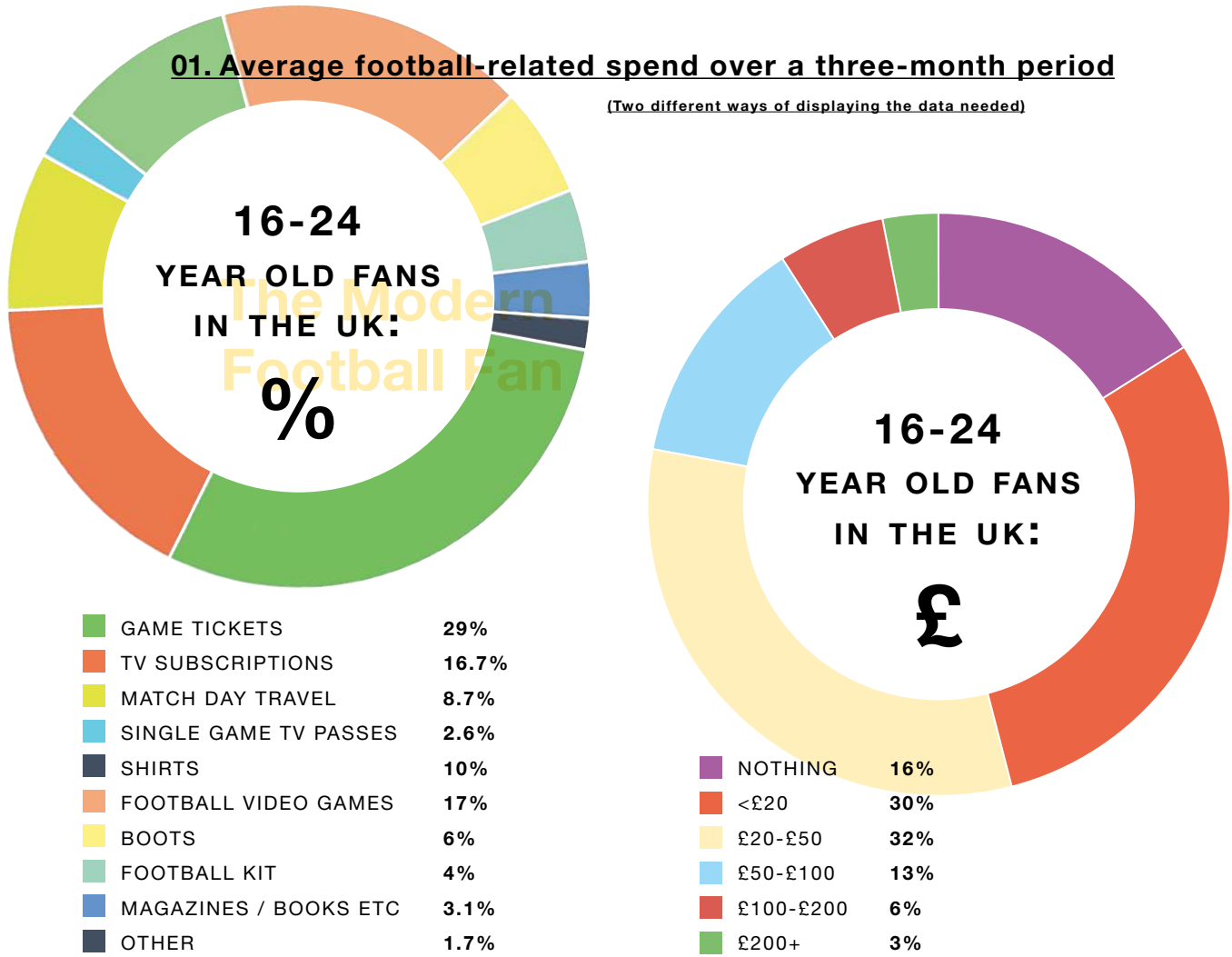
So throughout this study, we have looked at the different ways these passions cross over - and how new behaviours and innovations in gaming and music will affect the football content in the future.

## What the Modern Football Fan is Passionate About

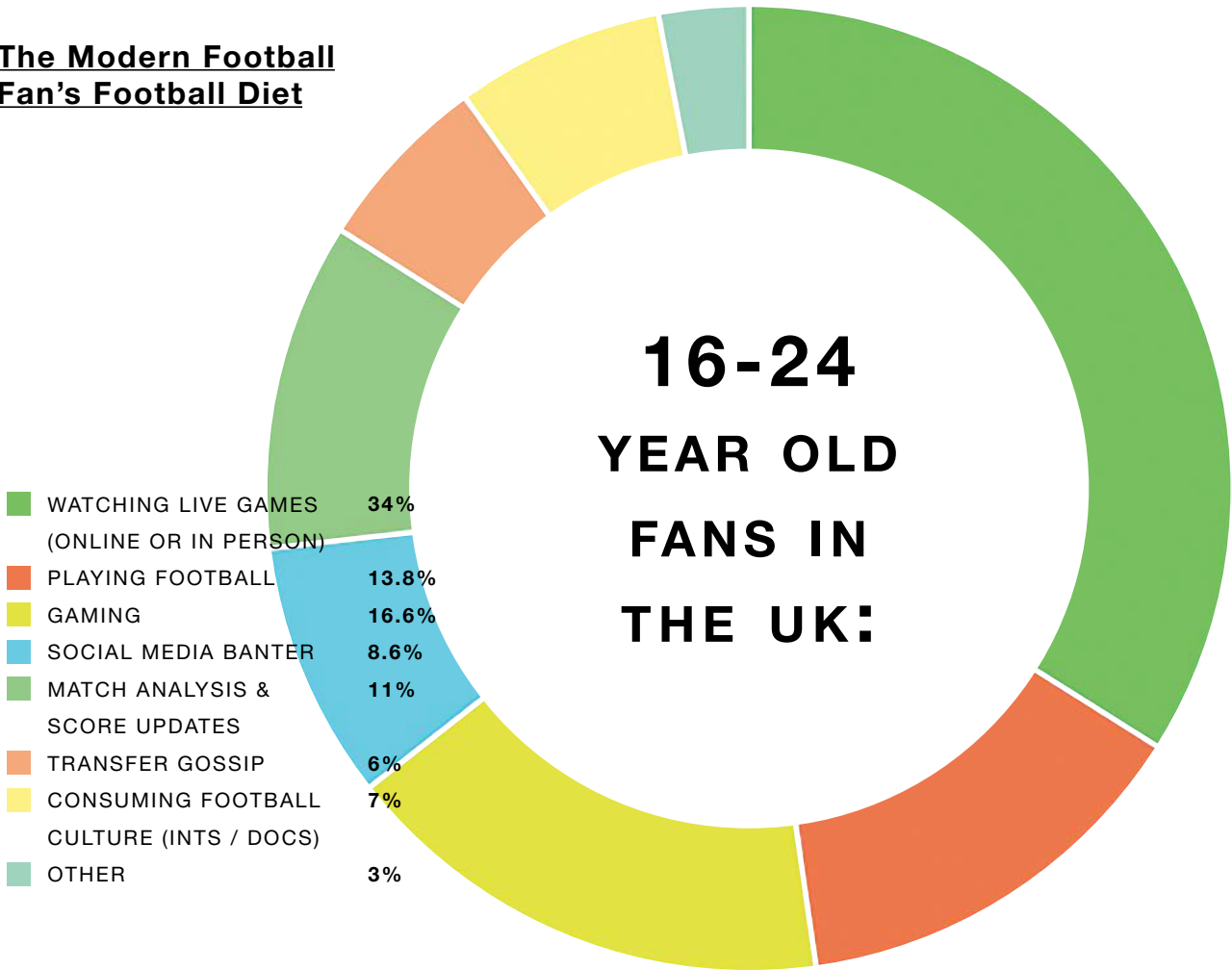


**Younger Modern Football Fans aged 16 to 20 years old are more focused on participatory-focused purchases (football boots, video games, team kit etc.) than their older counterparts aged 20 to 24.**

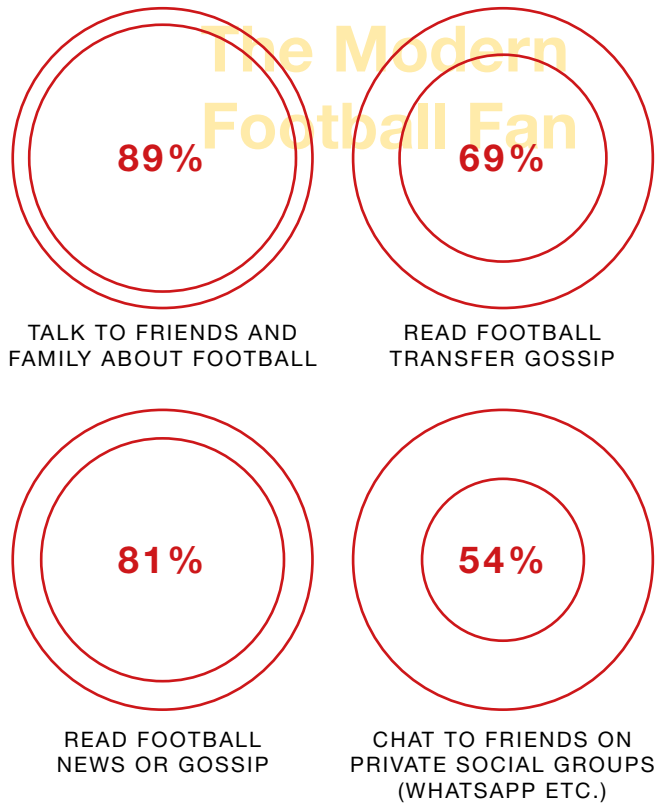
**20 to 24 year old Modern Football Fans spend more heavily on spectator-focused services and products (game tickets, TV subscriptions, etc.).**



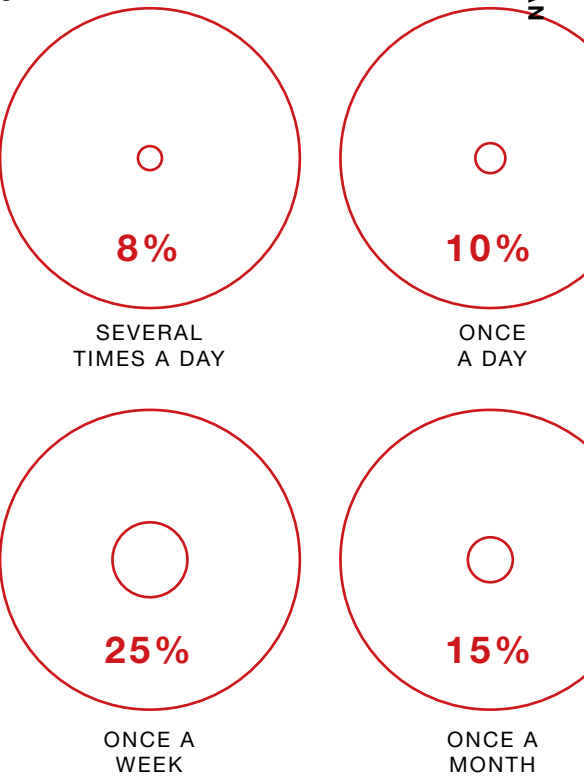
**02. The Modern Football Fan's Football Diet**



**03. Football conversation of UK 16-24 year old football fans**



**04. Football content shared on social media by UK 16-24 year old football fans**





# A NARROWING OF THE EUROPE / USA DIVIDE

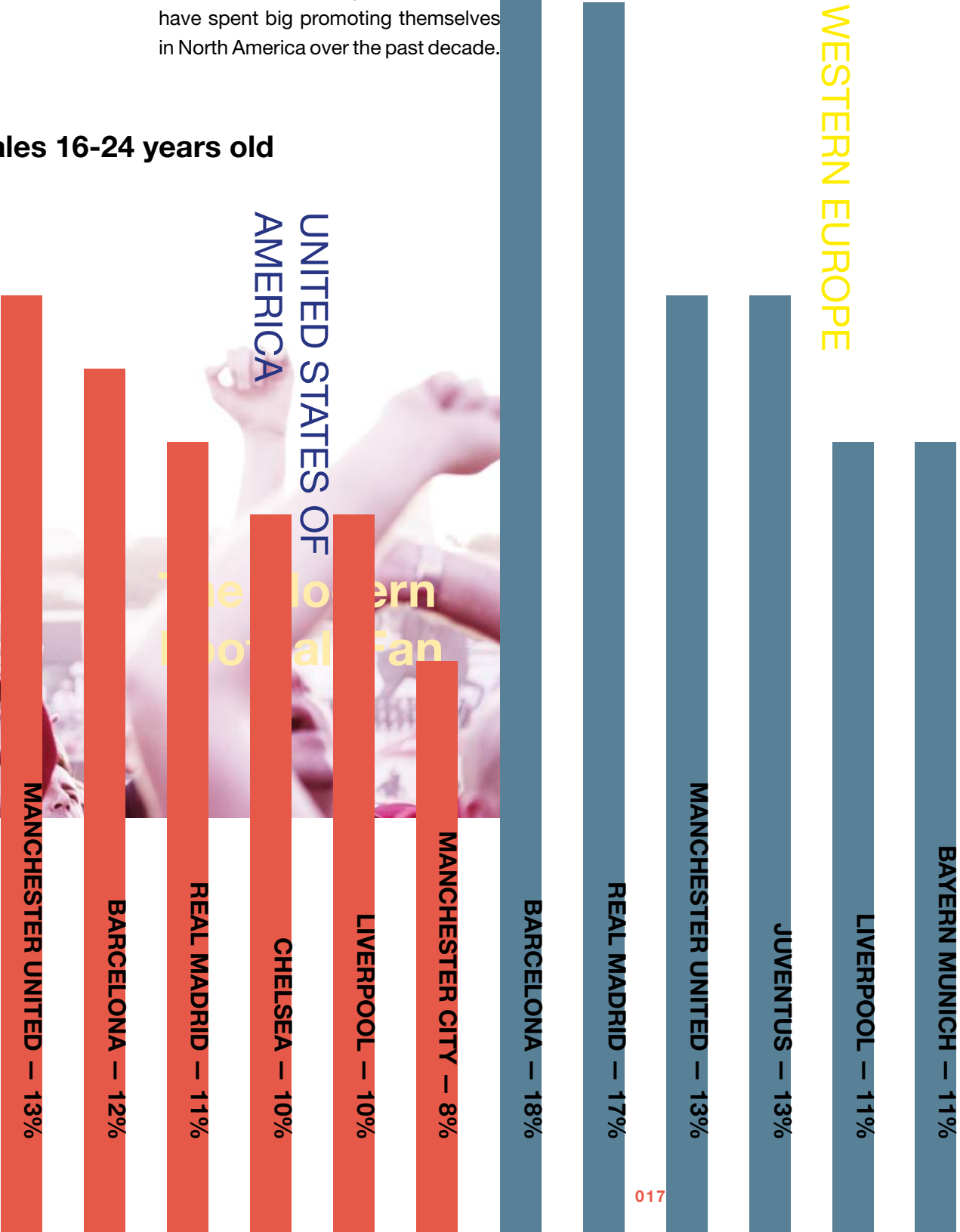
The Modern Football Fan



## MOST FOLLOWED EUROPEAN TEAMS

Club legacy and marketing are having a powerful impact on team choices among both Western European and US fans. In Europe, the biggest and best-known football clubs top the list. In the US, meanwhile, fans are heavily biased towards European clubs that have spent big promoting themselves in North America over the past decade.

Males 16-24 years old







# The Modern Football Fan

Established leagues and tournaments in Europe are being followed by growing numbers in the US. With domestic sports brands like NFL experiencing an identity crisis at grassroots level, ‘soccer’ is well-placed to increase its following amongst young Americans.

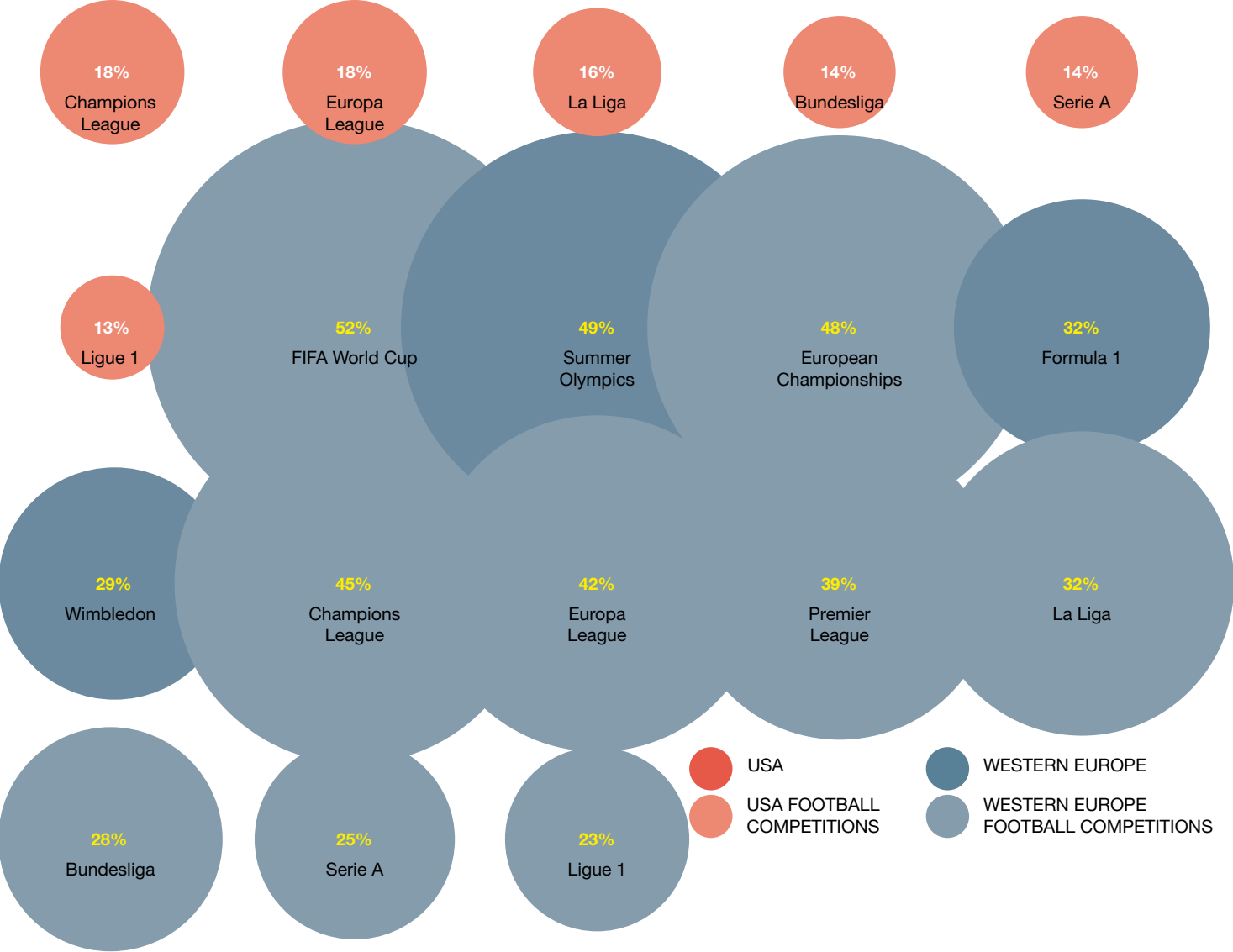
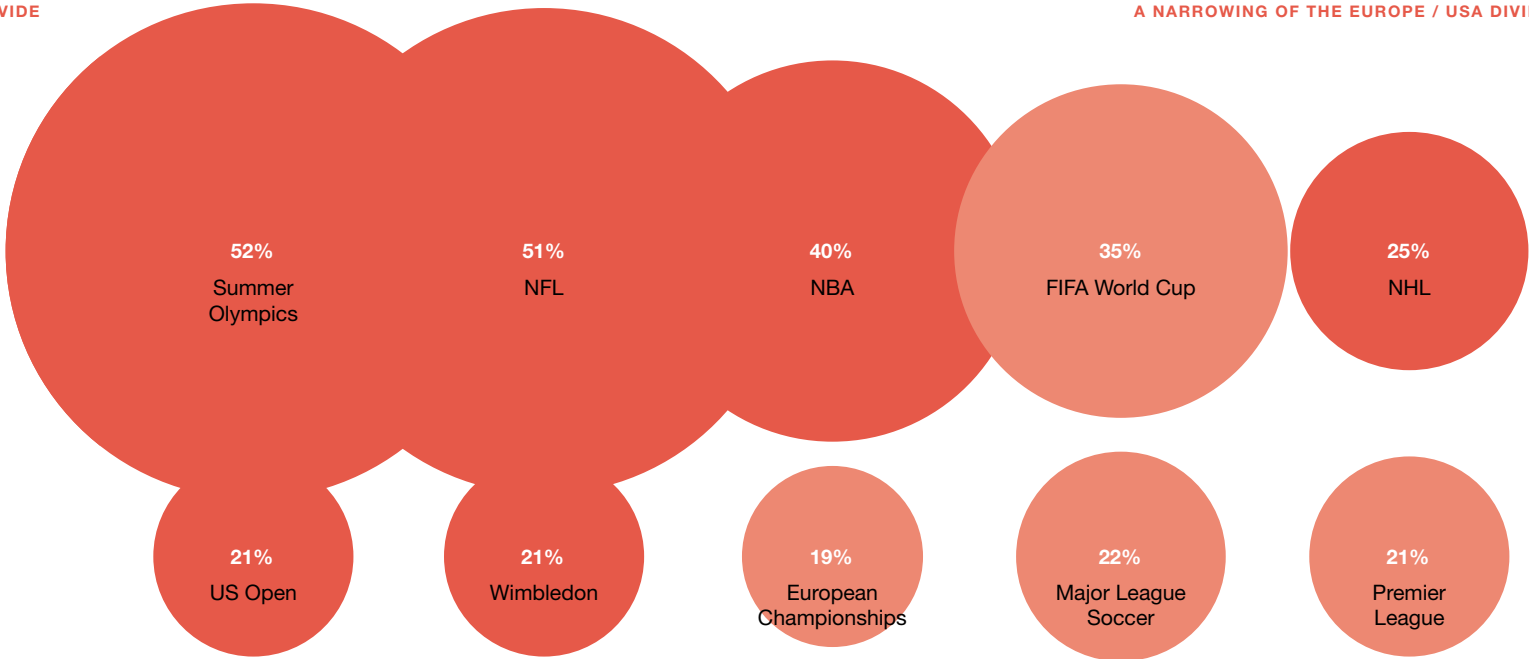
A NARROWING OF THE EUROPE / USA DIVIDE

A NARROWING OF THE EUROPE / USA DIVIDE

COPA90

THE MODERN FOOTBALL FAN

## SPORTING EVENTS / TOURNAMENTS WATCHED ON TV / ONLINE



USA  
USA FOOTBALL COMPETITIONS  
WESTERN EUROPE  
WESTERN EUROPE FOOTBALL COMPETITIONS



NEW BASTIONS

OF

R

P

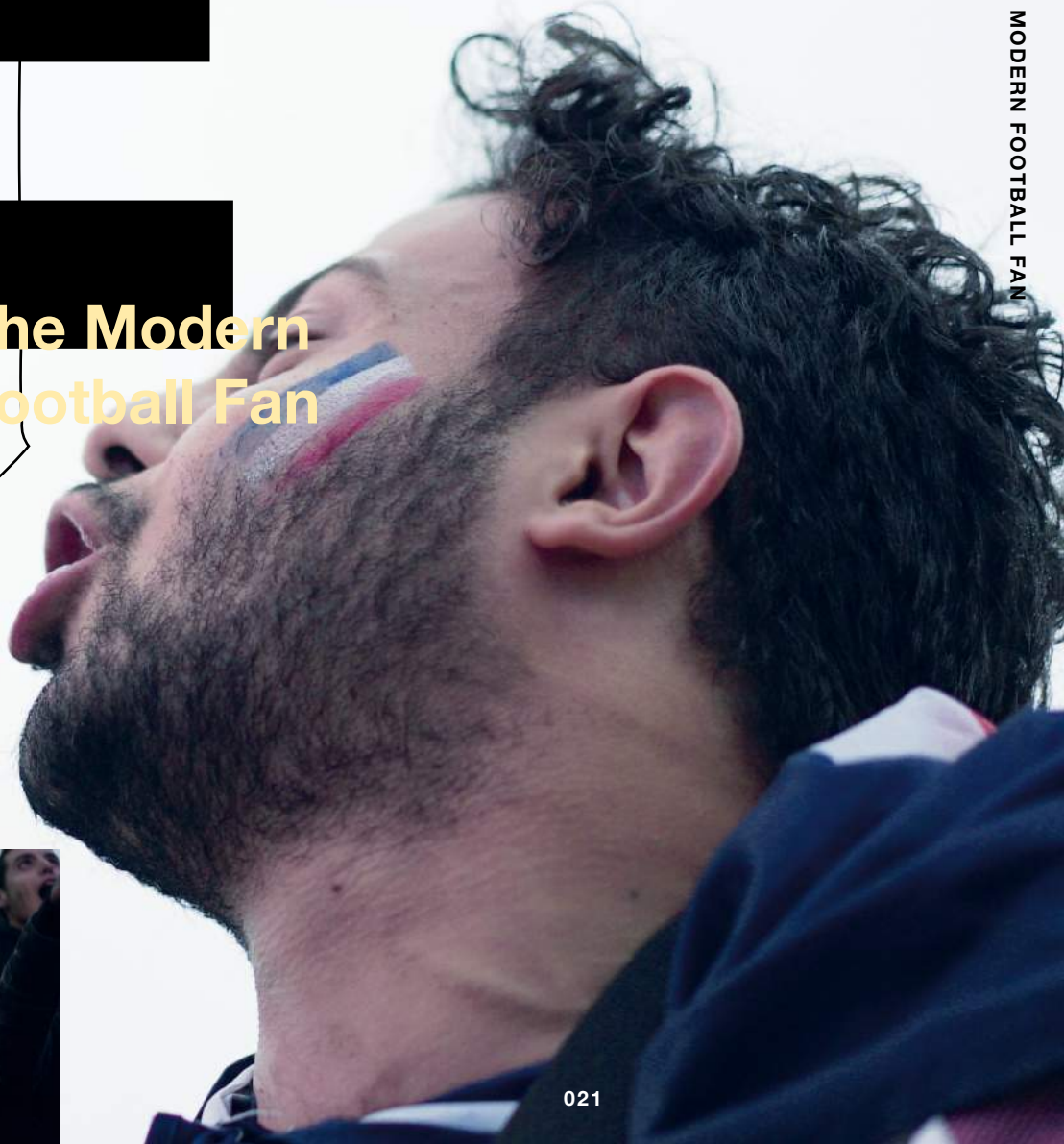
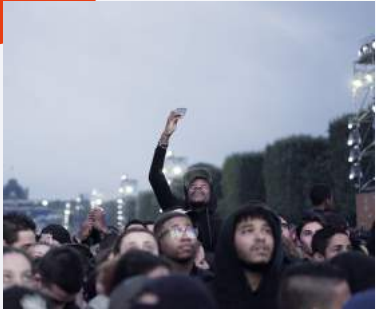
O

E

W

The Modern  
Football Fan

The Modern  
Football Fan





“When you can see all the goals on your phone immediately after the game, it makes programmes like ‘The Football League Show’ obsolete.” - Fan, 22

“You can now get all the goals on Snapchat - it’s like ‘Match of the Day’ on-the-go!” - Fan, 18

“You can get the same level of analysis from the comments below a tweet with the highlights, you don’t need to stay up and be in the house for a specific time.” - Fan, 24

The Modern Football Fan is moving away from traditional media formats that encourage passive, lean-back football consumption.

Match of the Day still benefits from a nostalgic glow – our research found that it remains a favourite for 82% of 16-24 year olds <sup>¥</sup>. But this is already starting to change as linear broadcast, feature-length highlights and analysis shows struggle to keep pace with new patterns of content consumption behavior.

The Modern Football Fan’s content consumption is driven by immediacy and mobility. These fans want their football fix on their terms, seeking it during the moments that matter and effectively pulling together their own highlights packages.

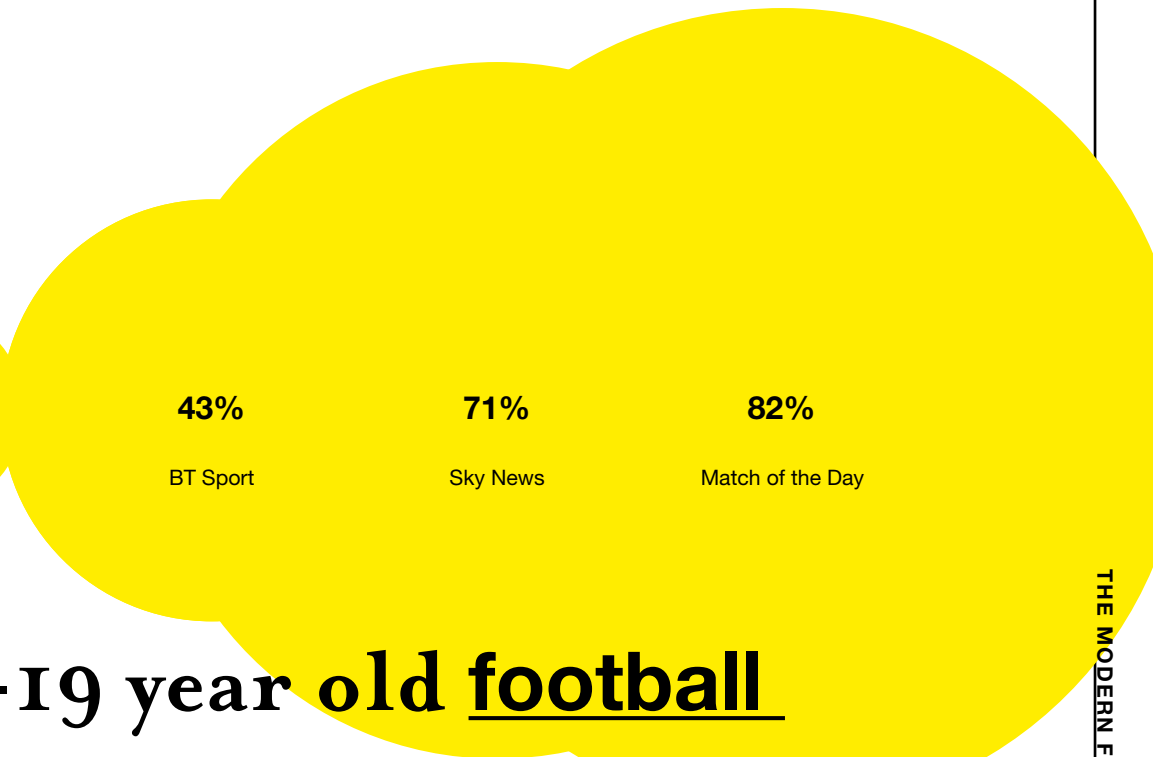
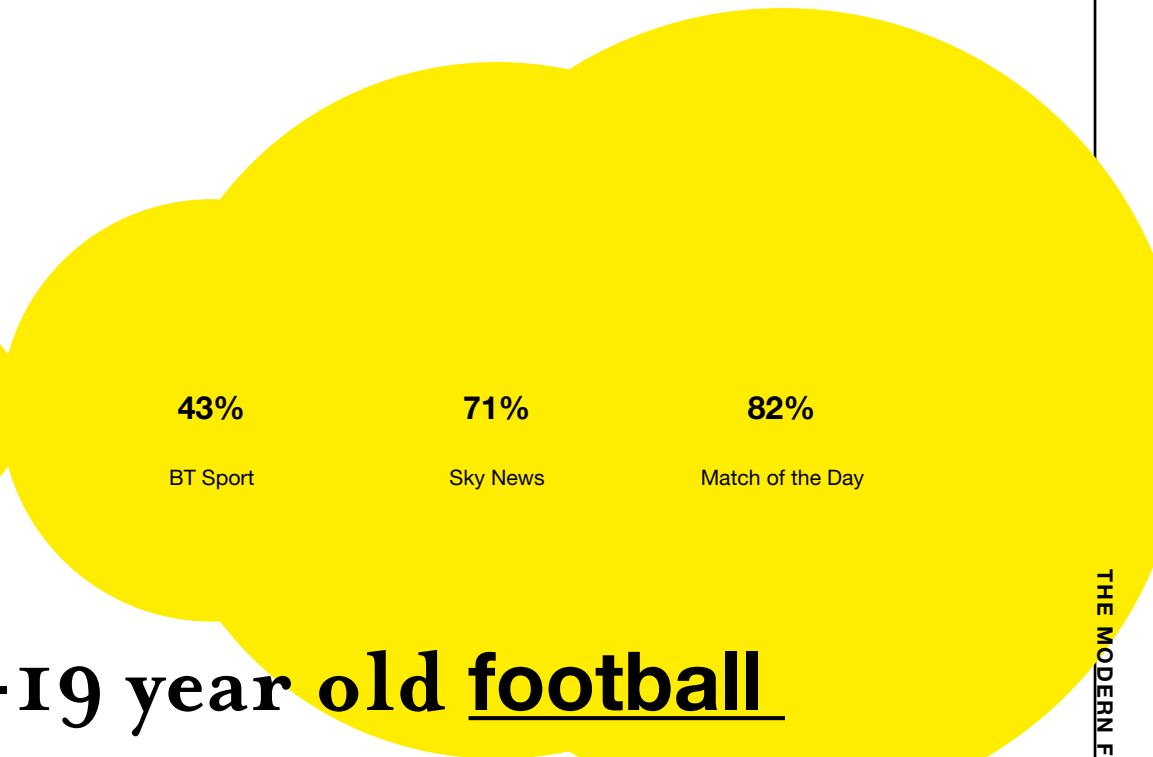
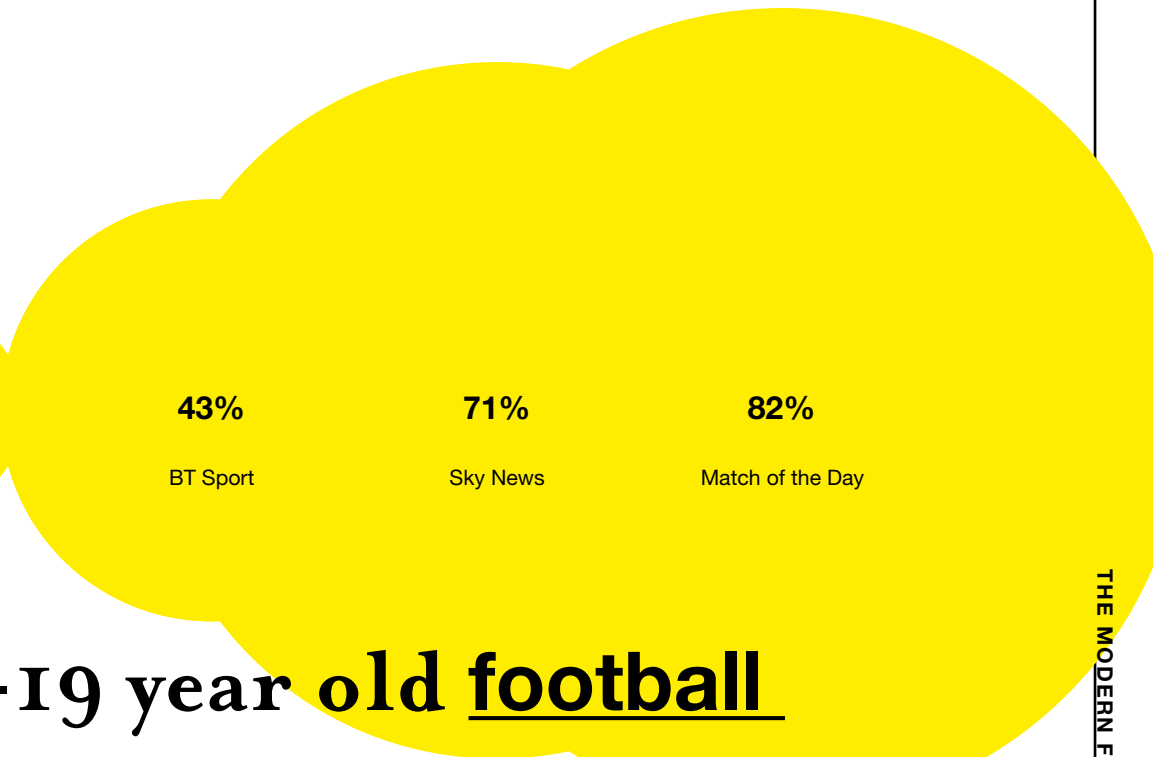
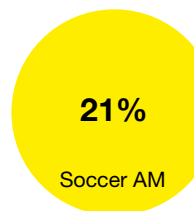
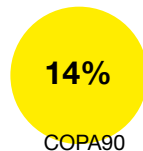
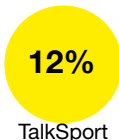
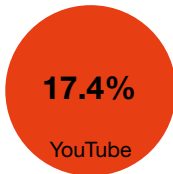
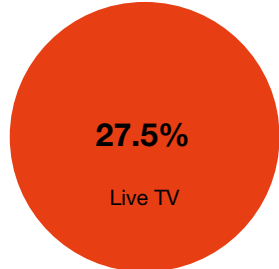
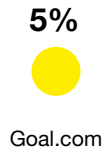


**COPA90 Predicts:**  
As action increasingly gets reduced to fragmented moments, traditional media will collaborate more with digital / social media players to bring to life their coverage in a way which suits the tastes of young audiences.

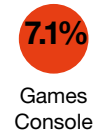
An industry view ...

“You might get scale with programmatic advertising but there's no engagement, and you are ultimately force-feeding an advert that is intrusive. You might get scale by sponsoring ‘Soccer Saturday’ - like Gillette has done, but again there's no engagement. What you're getting with fan media is engagement at scale.” (Source: The Drum)





The Modern Football Fan



UK 16-19 year old football fans'

football content VIEWING, split by platform

UK 16-19 year old football fans' Top three most popular FOOTBALL MEDIA BRANDS

The Modern Football Fan

# AN EVER-EXPANDING FOOTBALL UNIVERSE

The EVER-GROWING pool of football content fans can access has made their footballing universe bigger and broader.

¶ SOME THINGS **HAVEN'T CHANGED.**

¶ Today's football fan's primary way to show support for the game **they love remains watching or streaming** every week. Our research found **96%** of fans had watched football on live TV in the preceding 30 days.

¶ It also found that **Modern Football** fans now have an insatiable appetite for bite-size chunks of football content delivered by their social feeds. And this consumption is closely shaping their perceptions of the game.

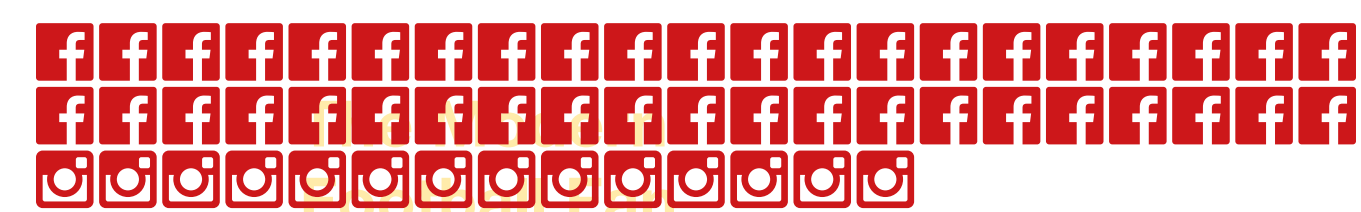
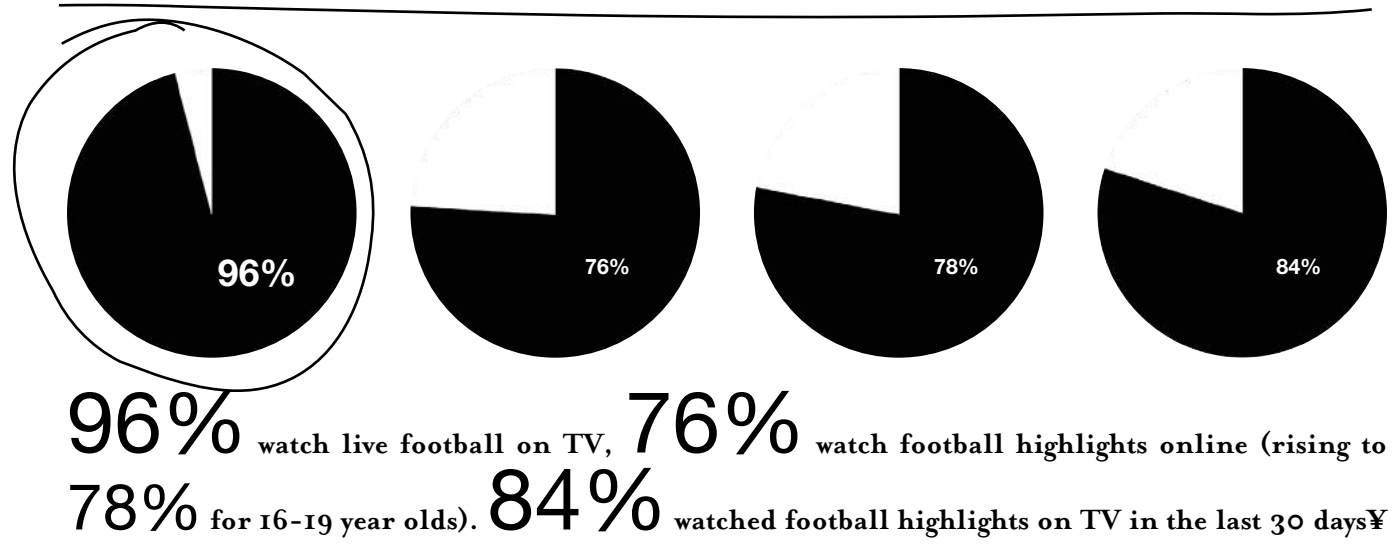
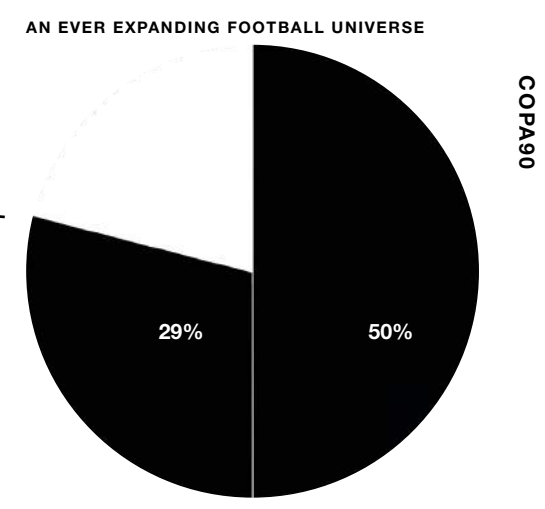
¶ A new normal of constant content has emerged which is creating an instant **craving** amongst fans. **This**



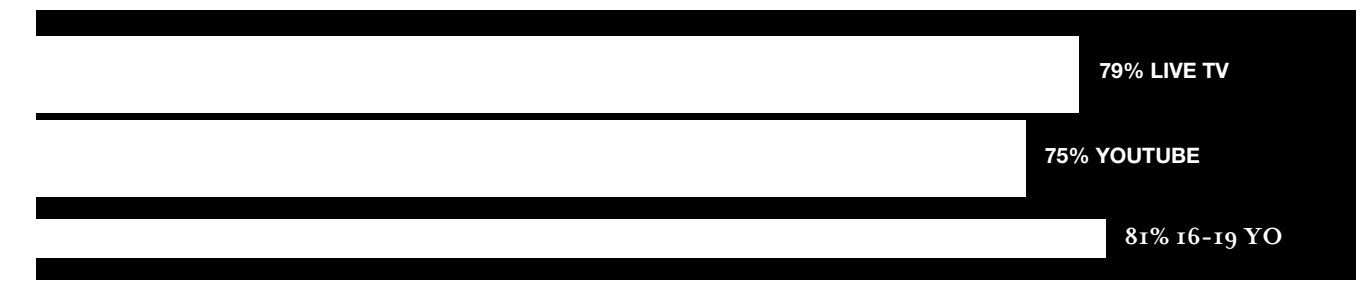
is being driven by the new eco-system of football content which now includes: clips, highlights, gifs, memes and comments - appearing not only for each game, but during key moments inside the 90mins. It is an 'always on' content environment in which football has evolved into an ongoing 24/7 soap opera that fans need to consume regularly through snack-style content in order to keep up with fast-moving narratives. As fans are exposed to more and different types of football content, their appetite will continue to grow as a sense of cultural 'FOMO' sets in for modern fans - the more of the game they are exposed to, the more they want to consume ... WITH NO SIGN YET OF FATIGUE.

# FAN FACTS...

50% of fans start looking for content related to an upcoming fixture 1-3 days before the game and 29% a day after the game.



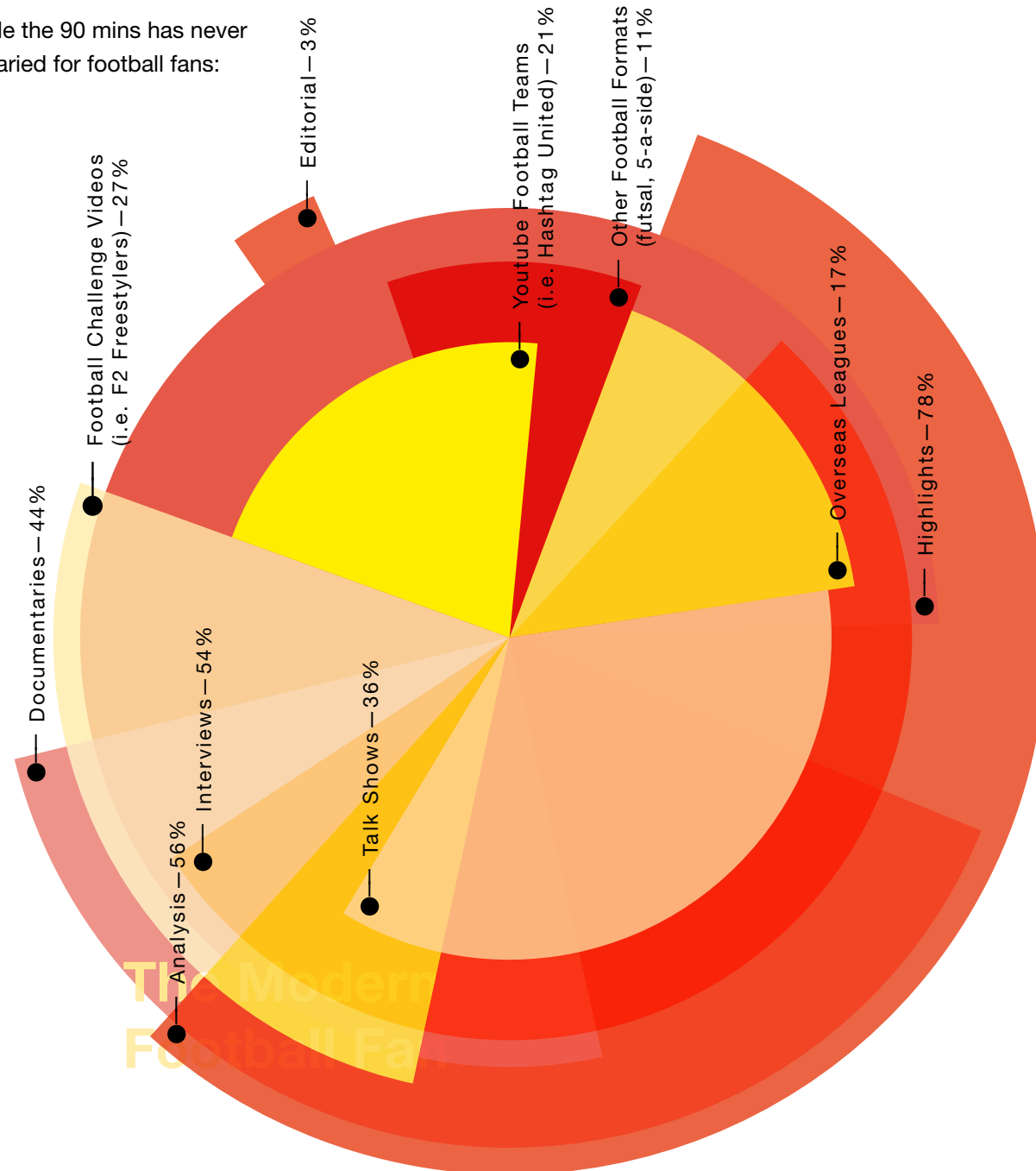
Facebook has 400m+ football fans as users while Instagram, which joined the Facebook family in 2012, offers 140m+. (Source: Facebook)



Fans are consuming almost the same amount of football content on YouTube as TV. For younger fans, it's even more: 79% live TV + 75% YouTube (81% 16-19yrs).

## What content beyond the 90-minute game excites the Modern Football Fan?

Life outside the 90 mins has never been so varied for football fans:



## DISRUPTIVE EXAMPLE...

State-owned Norwegian broadcaster **NRK** is a traditional player taking a more disruptive approach to meet new consumptions needs / patterns.

For teen series SKAM, it released episodes in real-time with no prior warning, direct to social media. All characters had their own Instagram accounts which were updated in time with SKAM's breaking stories. (Source: The Fader)

## What fans say ...

"I'll always have some football-related content on the background while I work - either a live stream or a documentary."

- Fan, 18

KING OF BEERS®



**Brand shift ...**  
Budweiser's shift from primary sponsor of the FA Cup to a partnership with Twitter to sponsor video clips is an indication of the power of highlights for the Modern Football Fan (Source: Telegraph)

## COPA90 Predicts:

Football's loudest voices will search for ways to be heard beyond the social media storm, leveraging whatever they can in popular culture. From cinema red carpet screenings to cultural cross-over live events, football will continue to be elevated in the public consciousness. Juventus on Netflix is just the beginning ...

The ever-growing pool of football content fans can access coupled with an 'instant craving' piqued by key moments has created an insatiable demand for both short and long form content that shows no signs of abating.

For Modern Football Fans, the game is still punctuated by thrilling on-pitch moments that they want to see live. But this is increasingly buoyed and maintained by daily dramatic twists and comedic sub-plots that evolve rapidly on social media.

## COPA90 Predicts:

Disruptive content forms in TV may soon come to live football.



amazon prime video

As the creation of content becomes ever more de-centralised, clubs may struggle to 'control the narrative' and make themselves heard above the noise.

Manchester City's forthcoming series with Amazon Video and Juventus' fly-on-the-wall Netflix documentary are innovative ways for teams to own narrative in this new environment.



## NEW VOICES OF AUTHORITY

Old voices of authority are losing their appeal.

The Modern Football Fan is less willing to settle for tired TV punditry that chooses to focus on refereeing decisions rather than interesting and passionate analysis.

New formats like 'Filthy Fellas' and 'Comments Below' do a better job of reflecting the type of passionate debate modern fans are having with their mates, in both style and vernacular.

Traditional gatekeepers of football analysis and cultural commentary are also falling out of favour, usurped by younger, culturally diverse and multi-faceted commentators that more closely resemble the Modern Football Fan.

Neutral voice and platforms like specialist football media and journalists are relied upon to balance the increasing prevalence of official club media on their feeds (20% of 16-24 year old fans follow football journalists on socials).

These formats and resources better meet the needs of the Modern Football Fan as they represent a passionate and direct interaction in their language with similarly-minded fans.

# NEW VOICES OF AUTHORITY

## COPA90 Predicts:

A continued fight for the right to be editor of choice for a generation who no longer trust the old media diet. They're looking to connect in a visceral way which packs a punch and not rely solely on clichéd platitudes

032



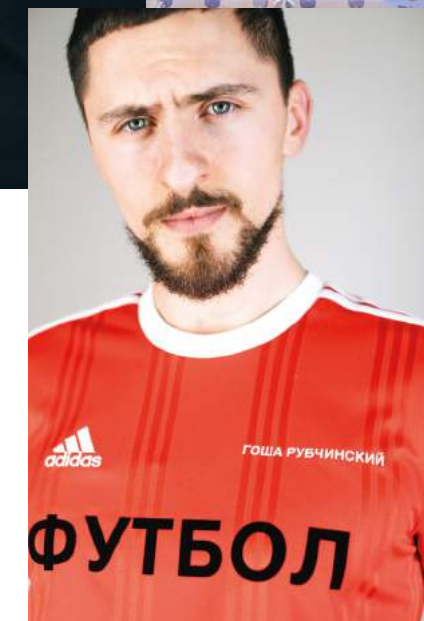
NEW VOICES OF AUTHORITY

POET

*"In shows like Filthy Fellas there's no mincing of words, it's raw, it creates discourse and controversy; [I can relate to it because] you don't always want to speak to your fellow fans; when Arsenal lose I don't want to speak to a Gooner, I want to speak to a rival fan... that's gonna create banter - it's painful but it's fun"* - Fan, 18

*"It's realistic the way these shows pit rival fans against each other - it reflects how you speak to friends at school on a Monday morning after seeing your team play at the weekend; win or lose you want to mock your mates"* - Fan, 16

*"You can't trust the club Instagram. It'll say 'we were unlucky' when, in reality, we were just rubbish for 90mins."* - Fan, 17



WU

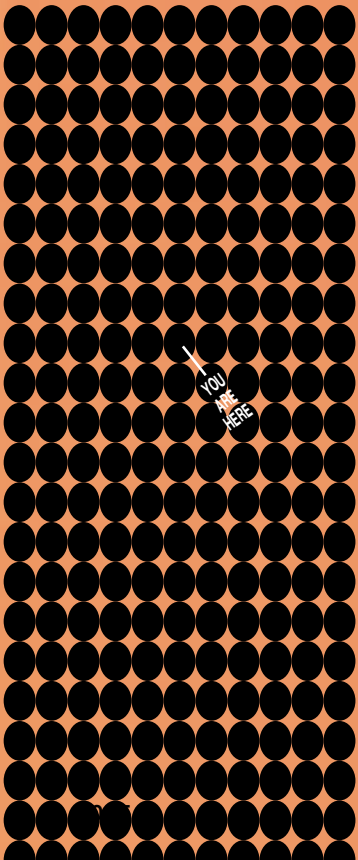


033



# YOU'LL NEVER WATCH ALONE

The Modern Football Fan has grown up streaming games alone in their bedroom. However, though they may be physically apart from other fans, they are never



THE MODERN FOOTBALL

COPA90

Source: online survey, February 2018 (N.515, 16-24 year olds)

YOU'LL NEVER WATCH ALONE

YOU'LL NEVER WATCH ALONE

YOU'LL NEVER WATCH ALONE

A TYPICAL MATCH DAY FOR THE MODERN FOOTBALL FAN REVOLVES AROUND STREAMING OR WATCHING THE GAME, WITH CONSTANT CHECKING OF SOCIAL FEEDS TO FIND MEMES AND RELEVANT INFO TO SHARE IN THEIR WHATSAPP GROUP CHATS WITH FRIENDS

alone because they socialise actively via digital spaces.

Our research found that 31% of fans are no longer able to attend a live game ¥.

This is a generation for whom socialising in digital spaces is a more comfortable experience than interacting in person, and through digital they enjoy a shared viewing experience.

A typical match day for the Modern Football Fan revolves around streaming or watching the game, with constant checking of social feeds to find memes and relevant info to share in their WhatsApp group chats with friends.

An important aspect of this behaviour is that the Modern Football Fan pulls in a patchwork of perspectives during games. So they are not only connected to friends and fellow fans but also rival fans, journalists and general online commentators - a far-reaching network of relevant voices that add texture to their viewing experience.

Modern Football Fans are also cognisant of the 'echo chamber' effect of platforms like Instagram which can skew their perspective on games.

They see it as vital to utilise a broad network of online perspectives to get a 360-degree perspective on the game.

Although the means of consuming football is becoming more individualised on devices, fans are still getting a rich, connected social experience during games through their private and public social networks.

The Modern Football Fan

“YOUNG FANS LOOK TO ‘AVOID THE ECHO CHAMBER’, AND FIND THE ANTIDOTE TO THEIR ALGORITHMICALLY-CONTROLLED LIVES.”

YOU'LL NEVER WATCH ALONE

The Modern Football Fan

**COPA90 Predicts:** As young fans look to 'avoid the echo chamber', a new platform or social tool might intentionally deliver differentiated opinion to the Modern Football Fan - the antidote to the algorithmically-controlled lives.

Brands in football will in turn take note; being different is better.



# What fans say ...

“It used to be really hard staying up to watch games when I was younger. But now, with TWITTER and INSTAGRAM, it’s like I’m watching with loads of other people at 3 IN THE MORNING” – Australian fan, 22

We’ve agreed that no-one is allowed to message in the group chat until half-time - that way we can concentrate on the game, but you know when something big happens you have to post something!” - Fan, 17

“When I was YOUNGER, I used to play FIFA with my mates online whilst streaming the game - that way we could watch, play and chat about the game.” - Fan, 16

“INSTAGRAM is definitely an echo chamber, and you can get a distorted view if you only follow official accounts. But on TWITTER you’re more likely to follow more diverse people and stuff that’s viral will go to the top - so it’s a bit more open.” - Fan 17



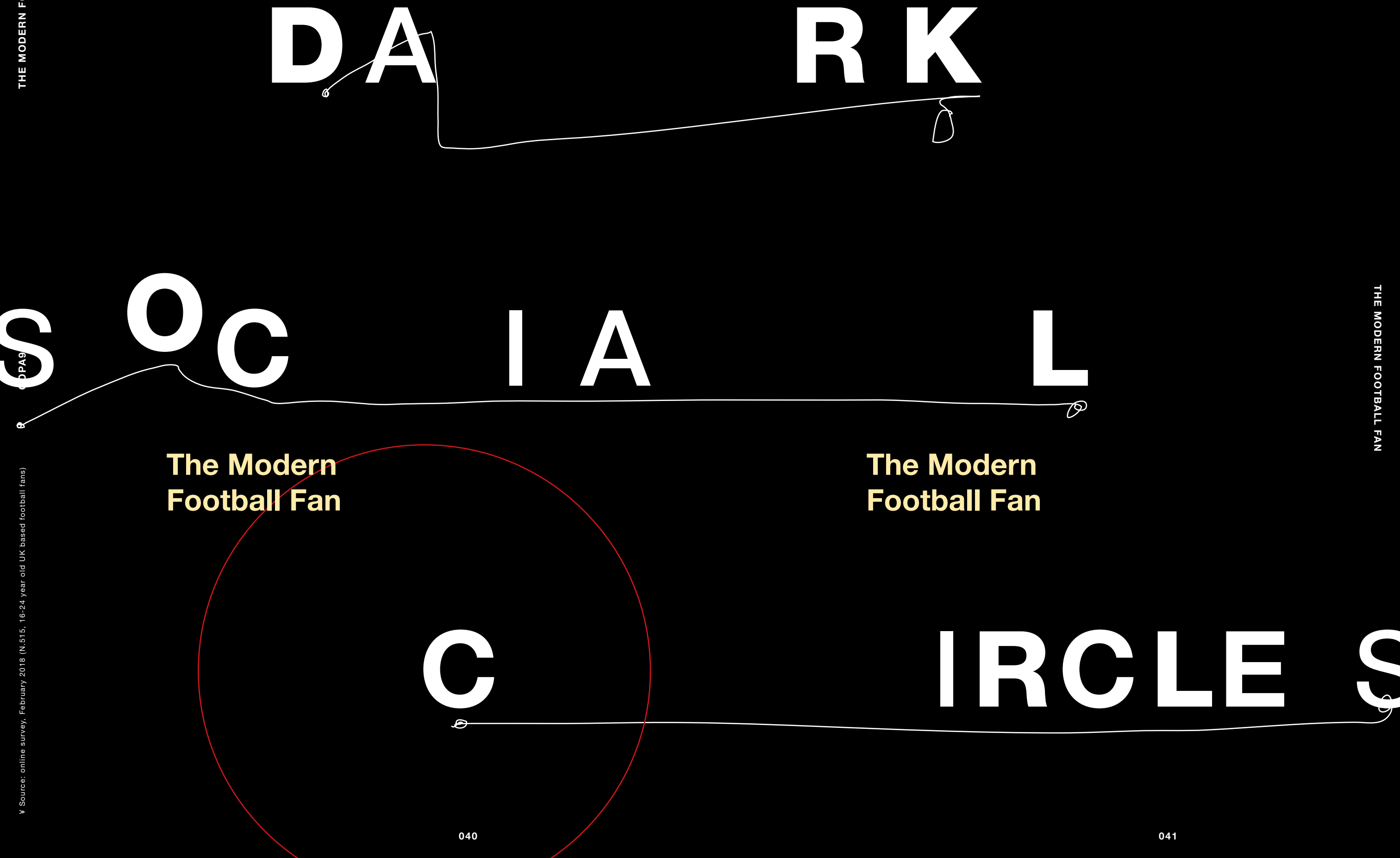
# Fan facts ...

79% of under-25s in the UK ‘SECOND SCREEN’ while watching TV (Source: Google)

65% of Millennials and Gen-z interact with each other digitally more than they do in the real world (Source: The Independent)

“Younger fans (aged 18-34) are considerably more likely than their older counterparts to say they stream live football matches online through an unofficial provider - 65% do so at least once a month compared to 33% of 35-54 year olds.” (Source: BBC)





WhatsApp group chat has become the epicentre of the **Modern Football Fan's** football conversation. Our research found that **58% of 16-19 year olds** in the UK now regularly use **WhatsApp** for football chat, compared with **32%** who posted something football-related on **Snapchat**, **24%** who **Tweeted**, and **15%** who posted on **Instagram**.<sup>¥</sup> Though fans are still active on their public social profiles, they are planning for the future ripple effect of their social posts via **WhatsApp**. Seeing celebrities they look up to, like Stormzy, being mischaracterised and maligned in the media because of old tweets is making them more cautious with what they put out on their own public profiles. The group chat is a safe haven from this, however. It acts as a virtual clubhouse for friendships forged though and based around football. In these private social networks, fans can more comfortably express their passion, dismay and heartache without fear of broader reprisal. Brands and clubs have already begun responding to this trend. **adidas'** Tango Squad is a team of football influencers who operate purely on 'dark social platforms' - like **FB Messenger** and **WhatsApp** - where the most authentic conversations about football happen.

**COPA90 Predicts:** Platforms competing to 'own' the social safe haven (and so the messaging dialogue within it, letting in only those brands who truly benefit fans). Hon-

esty and transparency will be key for those wanting to leverage this passionate epicentre of fan communications.

#### What fans say...

"I'll re-tweet something about Arsenal if I know if my mate who's a fan is going to see it." - Fan, 17

"I'm quite conscious of what I post of my Instagram and Twitter - you never know who's going to be looking at it in future." - Fan, 16



"Football Twitter is so harsh - you post one comment to some news or content and you'll immediately get eight replies, all of which will be hate." - Fan, 18



#### Fan data...

20% of 16-19 year old football fans are part of a private football chat group. 23% belong to an official supporters club.<sup>¥</sup>



52% of fans aged 16-24 have fewer than 500 followers on social media - they're not prolific social users aiming to grow a following.<sup>¥</sup>



#### Brand shift...

Footwear brand **Clarks** has joined the growing number of organisations and music artists using WhatsApp for promotional campaigns. (Source: Music Ally)



## HEAD: CURATING AND CREATING FOOTBALL CLOUT

The ability to rapidly filter and curate content for a fan's own private networks is a highly valued skill in a world characterised by unprecedented volumes of readily accessible content.

As a result, the Modern Football Fan is more reliant on sourcing content creators - who they hold in high regard.



What fans say ...



- FAN, 17

"I feel like it's someone else's job to create content, I'll just share it"

Fan 2

### 'CREATORSHIP' IS STILL IN ITS INFANCY.

But with more than 1 in 10 16 to 24 year old UK football fans already creating their own content each week ¥, the number of creators amongst modern fans is on the rise. And while there's a hesitancy amongst some fans about opening themselves up for criticism (or ridicule), the promise of having a one-hit wonder viral post on Football Twitter often outweighs this.

**COPA90 Predicts:** With creativity on the rise, broadcasters may explore ways to integrate meme-creating tools into their service to encourage content creation and sharing. Being able to watch the match and craft a meme whilst you're watching feels a very near-future opportunity.

### FAN DATA ...

A massive 54% of 16-19 year old football fans have a Spotify subscription - they are comfortable paying for digital content and are influenced by the normalcy of play-listing environments. ¥

## The Modern Football Fan

Messages

"There's so much Arsenal related content on Twitter on match days I sometimes need to rely on accounts I know I can trust for good content, like Eli from Copa90." - Fan, 18



Tweet

See new Tweets



# PLAYER BRANDS ON THE RISE

The Modern Football Fan



The Modern Football Fan

One of the defining qualities of the modern game is the access fans have to players off the pitch through social media.

In social's more quantified landscape - one where certain players have more followers than the clubs for which they play - the power of the player brand is ever more conspicuous to fans and advertisers.

The Modern Football Fan is often cynical about the commercialisation and management of these channels, however.

Far from being simply left starry-eyed by the behind-the-scenes content, they can quickly sniff out a player that is trying to build their own 'media brand' via socials, or polished, managed posts sent out by a management team.

Fans know that any good quality content from players will float to the surface of other football gossip / content profiles, so there is no need to follow hundreds of players to stay in the conversation.

Big numbers and allegiance to their clubs doesn't guarantee a deep engagement on a player's posts.

Players who manage to authentically build on their on-pitch / public personas with their off pitch social strategies, are reaching a growing partisan following.

Fans see players like Héctor Bellerín and Jesse Lingard as interesting because of the way they've built their brands by marrying their on-

pitch personalities with off-pitch activities on social media.

The way these players - and football personalities like Vuj - are able to smoothly navigate

other cultural worlds, (such as fashion and music) adds a depth and complexity to their personal brand. It also resonates deeply for young fans who are passionate about these worlds,

and put value on the ability to be culturally omnivorous. Other players like Mendy (despite being injured) are using their access to become reliable meme and content crea-

tors in their own right.

Playful personalities like Benjamin Mendy and Michy Batshuayi are comfortable speaking in the language of Football Twitter and can ingratiate themselves with a younger, often more partisan fanbase. Clubs can build a 'soft power' strategy around these types of players, who can become the alternative, online voices for their teams.

However, any online persona needs to grow from a seed of authenticity, as modern fans are extremely vigilant for content that feels false or too polished.

Metallica arena shows where audiences are asked to vote on what their next song should be. Could this be a logical next step with footballer social profiles?





## What fans say ...

"It's obvious that the stuff on **EVRA**'s profile is all set up - no one is that excited or happy all the time. Though it's become a bit cult because he's so over the top it's kinda funny." **Fan 24**

"I like following **YOUNGER PLAYERS** who don't have huge followings, the stuff they post is more raw and relatable. They're less media trained." - **Fan, 17**

"I find that **MOST PLAYERS**' social media accounts are so dour and robotic that there isn't much point following them anyway" - **Man City fan, 17**

Why would I follow **RONALDO** on Instagram, his posts are basically all adverts!" - **Fan, 22**

"I follow players because they're my team, but you can tell some of them have the same **PR PERSON** managing their posts - **Fan, 22**

"I really liked the **STORMZY** and **POGBA** video as it showed that clubs are paying more attention to what fans are doing away from football." - **Fan, 16**

## The Modern Football Fan

Fan DATA ...

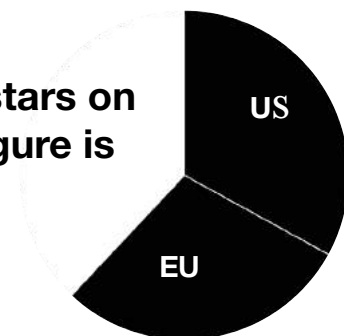


"94% of sports fans on Instagram use the platform to see the personal side of athletes. This kind of authenticity is especially important to Millennial and Generation Z fans."

Source: Instagram Consumer Insights 2017

29% of 16-24 males in the US follow sport stars on social media. In Europe, the comparative figure is 33%.

Source: t.b.c.



## COPA90 Predicts:

Injury lay-offs may turn some athletes into unofficial club spokespeople / content generators. Those with interesting personalities and control of their socials will find brand new ways to add value to their clubs.

## The Modern Football Fan

Why would I follow RONALDO on Instagram, his posts are basically all adverts!



## COPA90 Predicts:

Athletes allow audiences to determine how they act, like using a Playstation controller on FIFA

# SECOND TEAM FOOT- BALL

The Modern  
FIX



The Modern Football Fan is less inclined than previous generations to settle for enjoying just one team, style or dimension of the football world.

In today's mass-saturation football content era, they are more exposed to goals, **highlights and players from around the globe than ever before**. In addition, video games have conditioned a whole generation of fans to experiment with other teams and players - whether on FIFA or in a Fantasy Football League.

Currently, **46%** of 16-24 year old fans in the UK support a second team, and of those **27%** support three teams or more.

Many Modern Football Fans compliment fandom of a top division side by following a lower league / non-league club to have a visceral football experience regularly (due to low ticket prices), enjoy a greater sense of supporter community (and proximity), and see the game through a club-first, grass-roots lens (rather than that of the powerful player brands in the top leagues).

Conversely, fans from lower divisions tend to 'follow' (rather than support) major teams as a means of participating in the

day-to-day conversation around the Premier League. In this way, they enjoy the aspirational style of play currently absent from their own, lower league club. Fans are mixing and matching their football experiences to get their full football fix.

### COPA90 Predicts:

Fans seek the proximity that 'authentic' football played at the lowest levels gives. It will mean a more marketed club approach, where stories and entire eco-systems develop around even the smallest clubs to engage their fans – not just the Premier League big boys.



CO  
90  
BLO  
GU



#### What fans say ...

"I wouldn't say 'support', but I certainly follow a Premiership team as well as supporting Grimsby. I choose a team based on style of play as it can be hard going, down in League 2... there's loads more content and chat going around the big clubs." Fan, 22



#### Fan data ...

The focus of dual fandom shifts with age, superstars and credibility. 20-24 year old fans are more likely to support a non-Premiership team (53% Championship / EFL), our research found. 16-19 year old fans in the UK are more likely to follow a foreign top flight side - with the most popular being La Liga (41%)

The Modern Football Fan



## COPA90 Predicts:

In the live music scene fans have polarised their activities between arena shows and intimate, grassroots events... leading to a raft of mid-sized venues to close down. Could the same happen to the smaller professional clubs in the UK?

## What fans say ...

“Clubs like Forest Green are being clever with their marketing - tapping into values or topics that are important to young people to get attention.” Fan,

22

Which player or team a fan chooses to support is traditionally determined by legacy, proximity and success.

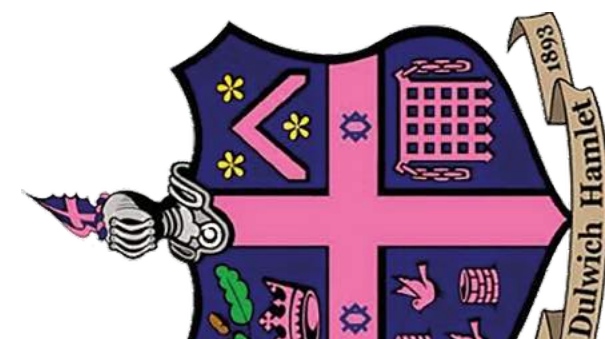
These still have an impact on who fans support as their primary team. Yet Modern Football Fans are more comfortable than older generations in taking an active role in the construction of their own fan identity.

These fans have a more fluid and nuanced understanding of identity that can intersect and diverge along racial, sexual, cultural and socio-political lines.

Clubs like Lewes and Forest Green FC, for example, have put progressive values at the top of their agenda and their ethical stance on sustainability and equality are already registering on fans' radars.

Elsewhere clubs like Dulwich Hamlet and Clapton FC are highly vocal in their support of causes such as LGBTQ rights and racism.

This trend is in tune with a growing number of young fans active interest in current affairs and politics (55% 20-24 year olds).





# MEANING IN

MEANING IN MEMES

MEANING IN MEMES

COPA90

THE MODERN FOOTBALL FAN



Fans' conversations around the game they love is

characterised by a new tone of voice. A massive 42% of

16-19 year old fans in the UK regularly share football-

**The Modern** themed memes or funny videos, compared with just **Football Fan**

32% who share game-related highlights or video clips.

Memes are becoming part of the football conversation,

but this in turn is beginning to cause a shift where

fans want to actively avoid the same content.

# MEMES

058

059

## The Modern Football Fan



THE MODERN FOOTBALL FAN

COPA90

Funny gifs or memes not only allow fans to say a lot in one quick communication, they also enable them to express themselves more openly. Recently media commentators have gone as far as to describe how young males are utilising these visual content styles to express their emotions and mental health issues in ways that they would struggle with in a face-to-face conversation.

THE MODERN FOOTBALL FAN can now use image and comedy to make quick-fire statements with a decreased fear of being judged for being too rude, arrogant, racy, snobby, stupid, etc. This is vitally important in a combative group chat environment! And it can be in direct reference to a live / recent game, or as a metaphor for events in daily life.

Parody and comedy-based social accounts are also becoming extremely popular. They are now being followed almost as heavily as first team player profiles - followed by 31% of 16-24 year olds versus 36%, respectively.

**Accounts which create and curate moments in meme culture** have enjoyed an increasingly powerful voice in the digital **football landscape for fans, with clubs like Bristol City now copying these tactics with great effect.**

With this just a part of the language and virtual wallpaper, it is fast becoming background noise.

Frequency of parody accounts and their 'same same' social reaction is now actually causing a negative reaction.

Young fans have spotted the lack of heart to so much of this, and are now rebelling in a quest for something new.

They're actively seeking to avoid the echo-chamber, looking for new and different content from people, platforms, and publishers too..

Memes are increasingly important to the Modern Football Fan. No longer do they just add to the language of football, they are the modern game's language. And to many, social media memes are the new pundits.

As with any successful meme, a successful football meme has got to feel contextual, of the moment and layered with meaning, rather than just irreverent or funny for funny's sake.

Captions especially can make the difference between being witty / interesting and cringey / juvenile. This allows for a multi-faceted approach to pitching a meme.

ON 3RD APRIL ALONE 6,881 VIDEOS WERE CREATED BY 5,622 DIFFERENT ACCOUNTS AND POSTED ON SOCIAL FOCUSED EXCLUSIVELY ON RONALDO'S SCISSOR KICK. HOW CAN ANYONE REALLY 'OWN A MOMENT' NOW, LIKE OREO DID IN THE SUPERBOWL?



**COPA90 Predicts:**

Because social moments and memes are now simply a means of communication and the new normal, clubs, brands and publishers risk only being a part of the noise.

As our young fans use language of 'avoiding the algorithm', the new winners will be those who focus on meaningful interaction and being memorable. *A return to the old values?*

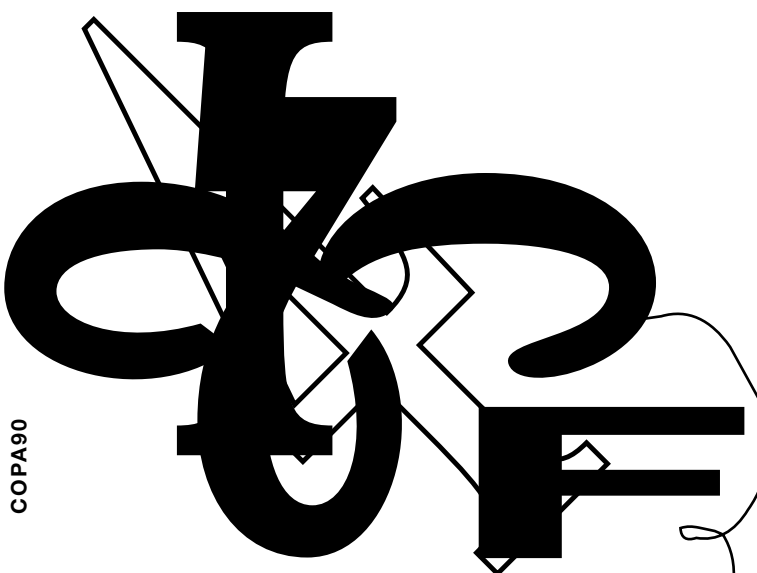
What fans say ...

"Clubs are much less formal on Twitter now - they post off-hand stuff like strange trendy transfer video. Some big clubs like Real Madrid would probably frown on it, but here in the UK I think we're seeing a revolution in the way clubs handle their social feeds." -

Fan, 18





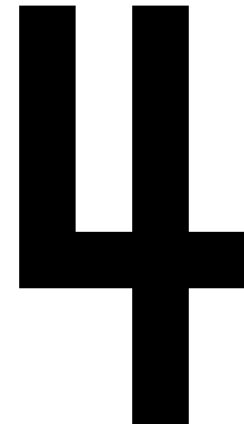


The Modern  
Football Fan

# The Rise of the Fan-alysts

The Modern  
Football Fan

Stats, algorithms, data ... the Modern Football Fan has matured in a world where every possible metric can be tracked or measured in some way.



9

7

8

5

0

4

7

9

## Game data ...

Football Manager entertains **8,000,000** players  
and Fantasy Football has 5,000,000+.

4

No longer reserved purely for the mathematically-minded, statistics are now the way that young fans evaluate the worth of things - whether that be a new music video on YouTube (by views), or their exercise routine (by distance / time).

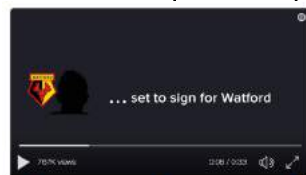
In a highly-saturated football landscape, stats around players and games have managed to become social currency, and a way to prove your knowledge of - and dedication to - the beautiful game.

Video games can provide the Modern Football Fan with a wealth of granular statistics, as well as a more nuanced way to look at football. It is also being used as the starting point for predicting and discovering tomorrow's talent.

The Football Manager scouting database, for example, has been licensed by professional clubs as a means of scouting in the real world.

This brings the professional world ever closer for fans, as well as allowing future super stars to marinate in the imaginations of fans before their real world breakthroughs.

Although Football Manager and similar franchises are not new, they seem increasingly relevant to modern fans in an age where statistics are ever more pervasive (eg. xG / Opta Fan Forum) and where scouting efficacy arguably caused the greatest upset in Premier League history.



## Fan data ...

Analysis is the second most desirable football content for fans.

1. 78% HIGHLIGHTS

2. 57% ANALYSIS

3. 54% INTERVIEWS

Source: Techradar

## What they say ...

"Aside from the clubs, players also have a huge stake in the (FM) data, beyond personal vanity. Now, scouting reports can affect real world contract negotiations and potential transfers to bigger clubs."

Source: Techradar

Scouts are becoming an ever more visible part of the modern game, they may yet become online personalities in their own right, sharing their knowledge on young or obscure players as cultural currency.

Source: Techradar

## COPA90 Predicts:

The success of Spotify's end of year stat campaigns show how compelling it can be to have your own statistics played back to you via storytelling. A similar story may occur within football either via gaming or the stats of your favourite players

0

8

5

9



## The Modern Football Fan

(BETWEEN VIRTUAL  
& PHYSICAL)

No commentary on the Modern Football Fan would be complete without putting a spotlight on the cultural influence of gaming.

Whether a teenager still living at home or a young adult in their first job, this generation of fans received their football education not by jumpers for goalposts but via gaming ... and it has left an indelible mark on how they view the game.

Playing football on a games console is never cancelled due to bad weather, nor does it exclude players based on their athletic ability. It can both be a reason to socialise, and a way to enjoy time alone.

Though Modern Football Fans play fewer video games as they progress into adulthood, the influence of this behaviour has created a new football fan perspective where the lines blur between the reality and virtual.

Where teen fans can call upon an unmatched knowledge of the game, surpassing all previous generations ... and where signing a computer game avatar to front a promotional campaign (Alex Hunter for adidas) makes total sense.

The closing chapters explore this shift in more detail.

# FIFA

## The Modern Football Fan

0% of 16-19 year olds spend virtual currency on football gaming at least once a month.

EA Sports' FIFA series of games or football simulations has had a major and transformative impact on the evolution of the Modern Football Fan.

First, some of the most popular YouTube channels and vloggers on the platform are creating content specifically around FIFA.

Second, as a way of life and the mark of a young football fan today FIFA is often the point of entry into the world of 'soccer' for fans in North America.

**FIFA** has **sold more than 150M** copies **+ 200M** virtual games are played **around the world every Sunday.**

Its graphic quality - with its near-perfect reproduction of realistic-looking grounds and players, and the real world physics and player movements - blurs the visual line between the virtual and the physical game.

## The Modern Football Fan

### Fan data ...

68% of 16-19 year olds actively play football compared to 74% who play the beautiful game on their game console. ¥

MLS fans are twice as likely to be gamers as the average sports fan in North America, according to 2017 data from Simmons Research. Furthermore, about two-thirds of avid MLS fans pointed to EA's FIFA series as the first thing that got them interested in soccer — a higher proportion than the percentage of respondents who said that playing the sport got them into it. Source: Polygon





As a result of FIFA’s impact, some of the most popular YouTube channels and **VLOGGERS** on the platform are creating content specifically around **FIFA**.

Popular FIFA YouTubers include Chris MD (3.8m subscribers) and Spencer FC (1.9m subscribers), with the current FIFA Interactive World Cup champion Gorilla boasting 0.5m+ subscribers on his YouTube channel and 110k followers on Twitter.

The channel SideMen FC essentially turns its take on FIFA and football-related entertainment into a lifestyle brand all of its own.

FIFA pack-opening videos, which show bloggers spending their FUT FIFA currency on players in the game, receive a huge number of views and is the type of content that resonates with the Modern Football Fan - **41% of 16-19 year olds spend virtual currency on football gaming at least once a month.**

FIFA now has more of a symbiotic relationship with the professional game than ever. Working in tandem with leagues (eMLS) and clubs, it develops professional eSports leagues and teams that run parallel to the professional game.

Players such as Lukaku and Batshuayi now passionately lobby for their statistics in FIFA to be amended and improved based on their recent exploits on the field of play.

Elsewhere, La Liga’s Head of Content emphasises how the league’s new camera technologies and overlays are following standards set in the virtual word; “We wanted to get as close to video games as possible”.

Clubs have also begun signing professional FIFA eSports players and teams to officially represent them in virtual leagues ... the lines will continue to blur.

86  
ST



LUKAKU

84 PAC 77 DRI  
84 SHO 35 DEF  
69 PAS 85 PHY

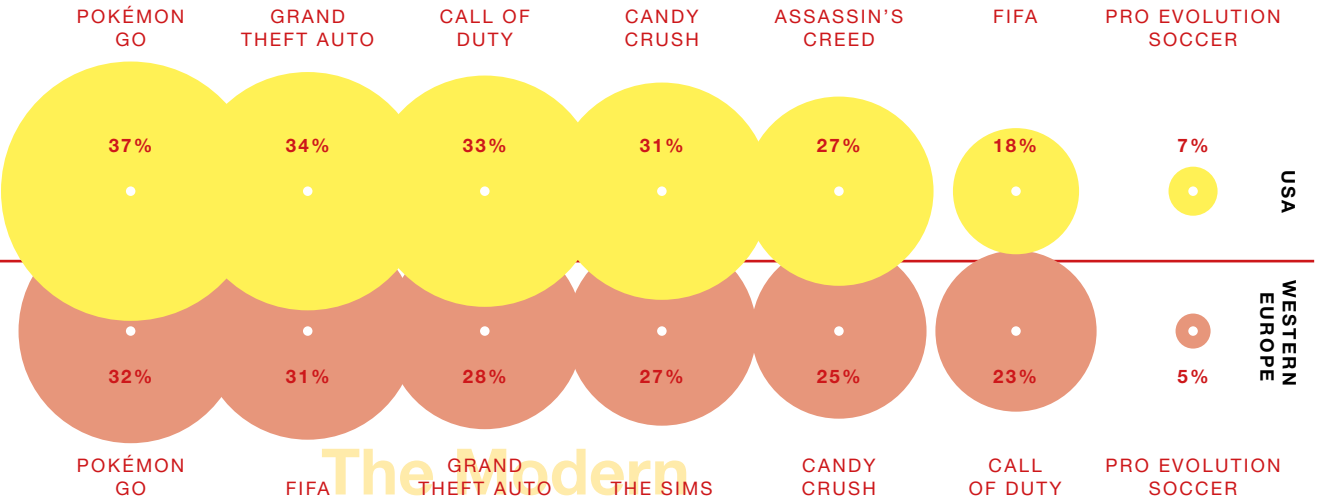


BATSHUAYI

AC 79 DRI  
HO 27 DEF  
AS 73 PHY

COPA90 Predicts:  
The blurring of gaming and real life, with just one ‘FOOTBALL’. Brands will exist in games, or advertise real life products through gaming characters. Films will spin out of games, players will weave in and out. **IT WILL BE INCREASINGLY DIFFICULT TO TELL THE DIFFERENCE.**

MOST POPULAR GAME FRANCHISES FROM THE LAST 12 MONTHS.Ω



What fans say ...  
“When I’ve been at work and sometimes we have a laugh because we lost, I always feel the need to go straight back home and beat someone at FIFA. You feel like you need to win... it’s like even though my team isn’t is a good as yours, at least I’m better than you at FIFA.” Fan, 17

What pundits say ...  
“Perhaps it should be no surprise that as the old places where the young carved out an identity away from their parents – football grounds and concert arenas – have become the over-priced domain of their elders, they should seek out new ways of defining themselves against previous generations and find these virtual spaces where they can gather, play and posture.” Source: The Guardian

# The Modern Football Fan

Online gaming is no longer a niche pursuit - 19% of UK football fans aged 16-19 consume content relating to esports daily ¥ and the younger audiences below them will drive this global growth further.

As with traditional sports,

# The Modern Football Fan



millions of viewers are tuning in to watch their favourite team, big league matches and top players. The time spent watching eSports videos rose by more than 90% in 2017 according to gaming trends analyst Newzoo.

Furthermore, 20m+ gaming video guides have been uploaded to YouTube, and 74% of YouTube gamers say they watch YouTube videos to learn how to get better at a game (Source: YouTube).

However, unless you attend a live gaming event (in front of crowds up to 15k people) or watch an event live streamed via the streaming platform Twitch, it is easy to dismiss this rapidly expanding world as niche interest.

COPA90

Every aspect of eSports crossover and real world sports will exist. Pillars such as players, crowds and stadia will both co-exist and inter-relate, with brands exploiting their coming together.

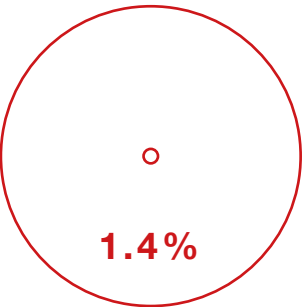
Predicts:

Fan data...

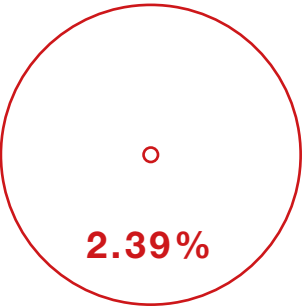
FANS THAT HAVE WATCHED AN ESPORTS TOURNAMENT IN THE LAST MONTH (16-24 MALES)

- 1.40% PHILIPPINES
- 2.39% CHINA
- 37% MALAYSIA
- 35% SINGAPORE
- 35% VIETNAM
- 32% SWEDEN
- 23% CANADA
- 23% UK
- 21% USA

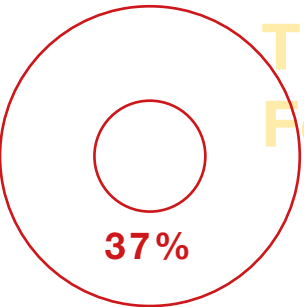
Source: Gqi Q3 2017 - Q3 2017



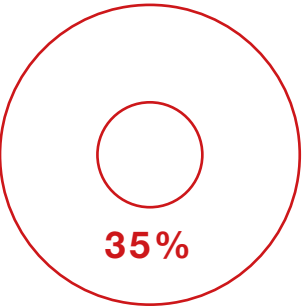
PHILIPPINES



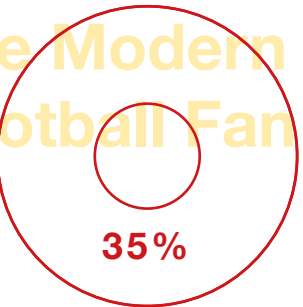
CHINA



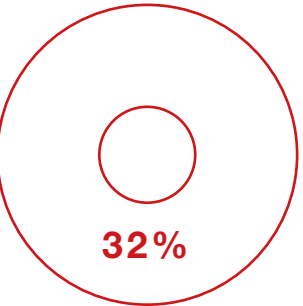
MALAYSIA



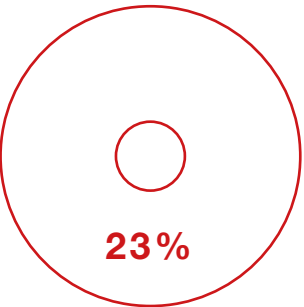
SINGAPORE



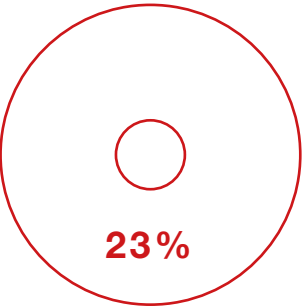
VIETNAM



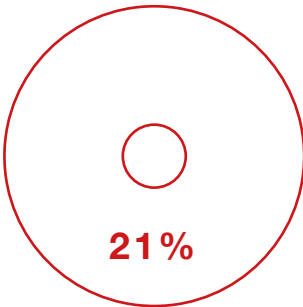
SWEDEN



CANADA



UK



USA

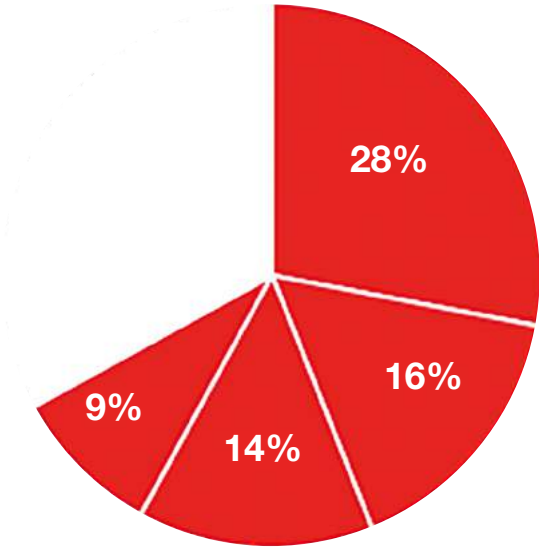
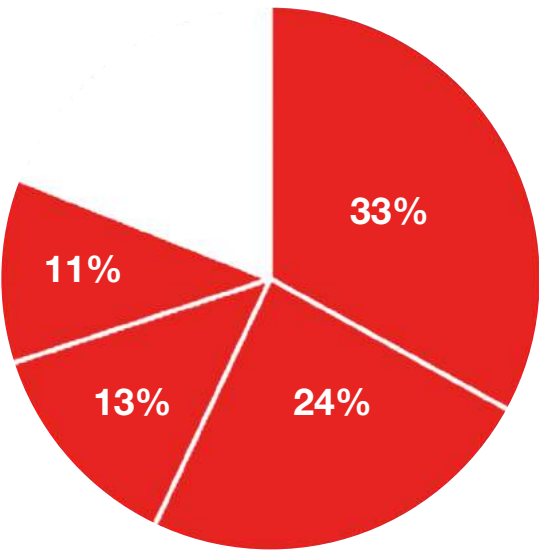
Online gaming behaviour amongst 16-24 year old males Ω

USA MALES 16-24 YRS

- 33% WATCHED A LIVE GAMING STREAM
- 24% PLAYED A GAME THAT YOU HAVE TO STREAM OVER THE INTERNET
- 13% WATCHED AN ESPORTS TOURNAMENT
- 11% BROADCAST A LIVE STREAM OF YOUR GAME PLAY

W. EUROPE MALES 16-24 YRS

- 28% WATCHED A LIVE GAMING STREAM
- 16% PLAYED A GAME THAT YOU HAVE TO STREAM OVER THE INTERNET
- 14% WATCHED AN ESPORTS TOURNAMENT
- 9% BROADCAST A LIVE STREAM OF YOUR GAME PLAY



# A Parallel Universe:

## Case Study:

Launched in 2016, Pitchero Play allows grass roots clubs to record and host videos in real time - both for supporters and the other 70,000 teams that are part of the Pitchero network. The Pitchero club websites allow teams to manage payments and memberships, and share information such as details on fixtures, player statistics and league tables. Source: The Telegraph

After traditional TV, YouTube is the next most important platform for fans - 81% of 16-19 year old UK fans use YouTube to watch football content - increasing in relevance the younger these fans are.

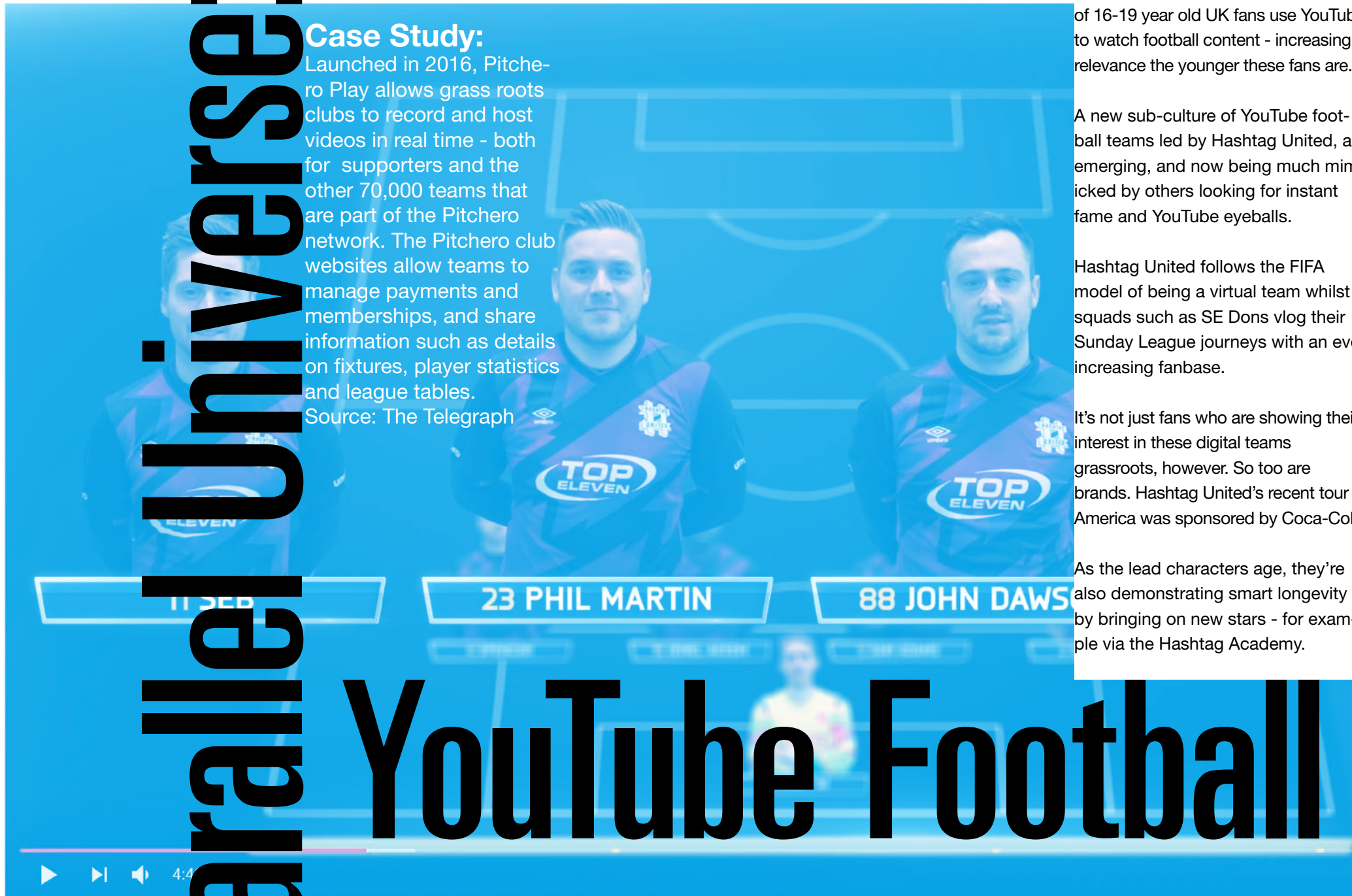
A new sub-culture of YouTube football teams led by Hashtag United, are emerging, and now being much mimicked by others looking for instant fame and YouTube eyeballs.

Hashtag United follows the FIFA model of being a virtual team whilst squads such as SE Dons vlog their Sunday League journeys with an ever increasing fanbase.

It's not just fans who are showing their interest in these digital teams grassroots, however. So too are brands. Hashtag United's recent tour of America was sponsored by Coca-Cola.

As the lead characters age, they're also demonstrating smart longevity by bringing on new stars - for example via the Hashtag Academy.

This is what another kind of 90 minutes looks and feels like.



HASHTAG UNITED VS REAL OVIEDO XI (#HTULaLigaTour)

421,908 views



Hashtag United  
Published on Dec 2, 2016

Win a year's supply of Judge Urban products by entering this giveaway:  
<https://twitter.com/hashtagutd/status...>

SHOW MORE

## FAN DATA ...

27% of 16-19 year old fans in the UK are interested in content relating to YouTube football teams

## COPA90 Predicts:

YouTube football action from 'Timbsy Vs The World' to F2 Freestylers will complete the circle driving younger audiences back outside. A contrast to the fear of screen time versus real time, young audiences will look to reenact and mimic the skills and action they see on YouTube and play it in the park and the real world.



# FEMALE

The Modern Football Fan

# Here come the girls

your  
never you go the game. As the number of  
male fans grows, so does our power.

The Modern Football Fan

Here  
come  
the  
girls

# GAZE





The women's game has generated significant media buzz in recent years, with a noticeable increase in bums on seats at games (on occasion with similar numbers to League 2 games).

The 2017 Women's FA Cup saw 35,271 fans in attendance and the FA have big plans to double the number of affiliated women's teams from 6,000 to 12,000 by 2020.

Major transfers (such as Toni Duggan's to Barcelona last summer) are creating social traffic and increasing the social currency value of female players. Both Steph Houghton and Alex Scott now speak to 90,000+ followers on Twitter, and brands are slowly beginning to see the opportunities with female player deals.

Meanwhile, female fans within the men's game are getting a stronger voice – and without big media support. New magazines such as Season and communities like This Fan Girl are taking female fans out of the tired 'women & children' bracket and giving them their own true and exciting media identity.

Female fans still feel they need to go an extra 20% to prove their legitimacy as a fan, our research shows – 21% attend a live game once

a month, and female fans are more likely than their male counterparts to be part of a supporters group or actively support at team in the Championship or EFL.¥



## COPA90 predicts: This

will be an exciting white

space for brands to play in,

and we'll see a new influx

of commercial partners

over the next 12 months.

Just as games like the EA

FIFA series now enable

women's team play, so the

female voice within foot-

ball becomes rightly nor-

malised for the average fan.

Brands with purpose and

innovation will push the

women's game, leading

to further changes in the

consumption of the game

for us all.

## What fans say ...

"Schalke are my main

team, and guys always take

me more seriously when I

tell them who I support.

I also go see Slough Town

play regularly too... people

think I'm someone's girl-

friend or related to one of

the players!" Female Fan,

22

## Fan data ...

Viewing figures for Wom-

en's World Cup Final:

2011 - 5.1 million

2015 - 12.4 million

35,271 fans attended the

2017 Women's FA Cup at

Wembley.



# CLOSING THOUGHTS

So there we have it - a topline glimpse of the Modern

Football Fan: a **COMPLEX AND FLUID BEAST**

fuelled by an insatiable appetite for football content.

¶ Educated by the game console more than the pitch,

this new generation of fan has an eye for statistics and a level of

player knowledge that would frighten even the most seasoned football sage.

¶ **Modern Football Fans' virtual and physical**

**football worlds weave back and forth,** influencing

one another, while blurring the line that separates them at pace.

¶ And this is creating a whole new football

landscape for clubs and brands to inhabit.

¶ Modern Football Fans see football fandom as multi-

dimensional - from following the exploits of god-

like superstars, through to the visceral thrill of the

grassroots game - and they don't want to miss out on any of it.

¶ Incessantly, they share, curate and - increasingly - create

football content on socials and in private chat groups, using

memes and gifs as a visual language for football debate and beyond.

¶ These chapters merely scratch the surface of what's changing - each

could be a book in its own right. But the fact of the matter is that

Modern Football Fans are changing the rules and the game.

¶ Now it is up to us to keep up.

## OUR RESEARCH METHODOLOGIES

## The Modern Football Fan

Editor : James Kirkham  
james.k@copa90.com  
@spoonybear

Research by COPA90 in  
collaboration with OMA  
studio - omastudio.org

Art Direction & design  
by Alex Mertekis @ MUNDIAL.  
www.mundialmag.com

★ Online survey  
n.515, 16-24  
year old football  
fans in the UK

★ Global Web  
Index online  
survey Q3/4  
2017, 16-24  
year old males,  
W. Europe (N.  
66.6k) & N.  
America (N.31k)

★ UK Qualita-  
tive Groups via  
Copa90 fanbase

★ Vox Pop video  
tasks (Internation-  
al respondents)

★ Various 3rd  
party white pa-  
pers and articles

