Global fans in the information age. Who are we? What motivates us? How do we create value?
How did we get to here? Why are fans fans? And how and why are fans different in different countries?

A NEW MAP OF THE FAN WORLD

Technology is changing everything. What being a ‘fan’ means – the long-established pattern of behaviour we associate with fans – is being disrupted by a raft of new sport and entertainment formats and new ways of consuming them. Rights-holders, broadcasters and sponsors need a map for this new global fan landscape.

Fan DNA™ was conceived in conversations between Repucom and some of the world’s largest rights-holders and sponsors in 2014. Its purpose is to help brands acquiring sponsorship packages or rights-holders creating sales propositions make more targeted and profitable decisions in relation to sponsorship strategy.

Repucom launched a meta-analysis of the many millions of fan interviews it has conducted across the world over the past decade, using this vast data mountain to develop a unique new piece of behavioural research across eight countries around the world. Over the summer of 2014, 8,000 new interviews were conducted across the UK, Germany, USA, China, Japan, Australia, Malaysia and Mexico – tracing the ‘fan journey’ of each respondent, from childhood through to the development of the combination of attitudes and consumer behaviour which defines them as a fan now.

Despite the incredibly diverse group of markets selected, seven clearly differentiated groups of fans emerged – each one with their own distinctive characteristics, behavioural tendencies and attitudes to sport and sponsors.

Each of these groups contains both men and women of all ages and incomes. And the most ‘avid’ fans are also spread between a number of these groups. In fact, Repucom found that self-identified avidity was a relatively poor predictor of the strength of response to sponsorship.

Repucom has now developed an algorithm which can predict the Fan DNA™ segment of any fan within minutes, and all our quantitative research (>500,000 interviews each year) now carries this technology – so our global understanding of this fan behaviour gets deeper with every passing week. Repucom clients are now using this to not only make better sponsorship investment decisions, but also to design much more effective communication and activation initiatives. Crucially, they can now also track the performance of their investments in terms of the behaviour change of each segment, and embed this deep understanding of fans into their CRM systems to accelerate real value creation across their whole fan base.

The 7 behavioural segments (global average %)

Sponsor brand recommendation

“HAVE YOU EVER ACTUALLY RECOMMENDED A SPONSOR BRAND TO A FRIEND?”

NO 82%
YES 18%

OF THAT 18%:
ADVOCATES
GAME EXPERTS
BUSY
DISENGAGED
ARMCHAIR FANS
CVNIC
TREND POSITIVES

Source: Repucom Fan DNA™ Survey, August 2014. Total for eight countries (USA, UK, Germany, Mexico, Malaysia, China, Japan, Australia)
What are the seven fan groups? Which activations work best for each one? And how do we make these insights work for us?

**FAN DNA™: NFL AND EUROPEAN FOOTBALL**

The data below offers a comparison of fan groups between National Football League (NFL) fans in the United States and European football fans in Europe. It shows a substantially higher proportion of NFL fans in the United States than European football fans across Europe.

For NFL fans in America, team affiliation is evidently an important part of their personal branding – the data breaking down fan segmentation amongst the top five NFL teams bears this out; NFL team fan bases tend to include more Trend Positive fans than the top Premier League teams in England.

There is also a larger proportion of Armchair Fans in the NFL in the United States than of European football in Europe, which is driven largely by the broadcast coverage of the two sports: NFL games are widely available on free-to-air networks across the United States, whilst European top-level football tends to have moved from free television to pay services. European football’s higher proportion of Cynics suggests these fans have been turned off by what they may perceive as over-commercialisation of the beautiful game.

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<thead>
<tr>
<th>NFL</th>
<th>EU</th>
<th>NFL</th>
<th>EU</th>
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<tbody>
<tr>
<td>11</td>
<td>6</td>
<td>30</td>
<td>32</td>
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<td>15</td>
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<th>NFL</th>
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<tr>
<td>4</td>
<td>11</td>
<td>16</td>
<td>26</td>
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Source: Repucom SDNA May 2015, Europe = average across UK, DE, IT, ES, FR

**TOP 5 NFL TEAMS**

- **Dallas Cowboys**: 18, 17, 18, 12
- **Denver Broncos**: 17, 15, 29, 10
- **New England Patriots**: 12, 17, 20, 13
- **Pittsburgh Steelers**: 16, 13, 25, 13
- **Green Bay Packers**: 13, 14, 24, 12

**TOP 5 PREMIER LEAGUE TEAMS**

- **Manchester City**: 7, 41, 19, 5
- **Manchester United**: 11, 34, 18, 7
- **Arsenal**: 6, 39, 16, 8
- **Chelsea**: 7, 42, 17, 8
- **Liverpool**: 9, 30, 23, 6

Source: Repucom Sponsorlink surveys in USA and UK
GAME EXPERTS

**They want facts, statistics and tactics**

Game Experts’ principal underlying motivation for being a fan is a deep interest in and connection to the intrinsic detail of the game. Activations that enhance their appreciation of that detail therefore work really well for them. Conversely, sponsor activity seen to ‘get in the way’ of the game will receive a pretty negative reaction from this group.

It’s all about the sport. They want to know every detail, from tactics to additional statistics, and possess a detailed understanding of the strategy and the nuances of their favourite sport. They are major consumers of sports news via newspapers and pay television. They do not tend to participate in sport, although they are likely to have played at school.

They want data and facts, and regard sponsorship as a necessary ingredient for sport; a sponsorship must be visibly helping their team or enhancing their experience of watching. Top players, in the view of Game Experts, are overpaid, while sponsors take up too many seats at games.

Game Experts have a high interest in sport, particularly football, but are not so interested in fashion; they are more practical buyers.

**Who are they?**

<table>
<thead>
<tr>
<th>Gender</th>
<th>Male</th>
<th>Female</th>
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<tbody>
<tr>
<td>%</td>
<td></td>
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<tr>
<td>Total</td>
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<table>
<thead>
<tr>
<th>Age Groups</th>
<th>Under 20</th>
<th>21-30</th>
<th>31-40</th>
<th>41-50</th>
<th>Over 50</th>
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<tbody>
<tr>
<td>%</td>
<td>24%</td>
<td>41%</td>
<td>35%</td>
<td>11%</td>
<td>8%</td>
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<table>
<thead>
<tr>
<th>Income Group</th>
<th>Lower</th>
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<th>Higher</th>
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<tbody>
<tr>
<td>%</td>
<td>31%</td>
<td>30%</td>
<td>31%</td>
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<table>
<thead>
<tr>
<th>Interest in sport</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
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<tbody>
<tr>
<td>%</td>
<td>22%</td>
<td>39%</td>
<td>47%</td>
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| How to communicate with them? | Stick to the facts | Statistics, statistics, statistics | Show benefit to their team |
|------------------------------|-------------------|-----------------------------------|

**ACTIVATIONS WHICH THIS FAN GROUP LOVE**

**GLOBAL AVERAGE: TREND POSITIVE 9%  GAME EXPERT 13%  CONNECTION FAN 25%  ARMCHAIR FAN 18%  BUSY 18%  DISENGAGED 8%  CYNIC 11%**

**US OPEN – IBM**

Golf fans can keep up with the US Open wherever they are with an application that provides a live leaderboard and hole insights explaining which clubs a player will select, the difficulty of a hole and real-time analysis of stats and shots on the course.

**STARPLAYER – Heineken**

Heineken’s StarPlayer app, to complement its sponsorship of the UEFA Champions League, works in real-time, with fans encouraged to display their knowledge of the sport and competing teams by trying to predict various elements of the game – when goals will be scored, or the outcome of corners or free-kicks. Players score points depending on how early and accurately their predictions are.

**HERTHAHELDEN – Hertha and Deutsche Bahn**

Fans watching Hertha Berlin are given the chance to vote – and win prizes as a result – to nominate the team’s ‘hero’ of the game via an official club app; the player is then honoured at full-time. The app also includes statistics and other features, part of the concerted club and sponsor effort to link the stadium experience with the possibilities offered by the digital world.

**TACTICS PREVIEW – Mercedes-Benz**

Ahead of German national team games, Mercedes-Benz, a sponsor of Die Mannschaft, previews the action from a tactical perspective, with detailed analysis of the opposition and Germany’s likely approach.

**POWER PLAYER – Yingli**

As part of its premium partnership with Bayern Munich, solar energy company Yingli created the Power Player concept. The company calculated FC Bayern players’ kilowatt-hours during each home game, inviting fans to guess the final total to be in with a chance of winning match tickets.

**LEGENDARY SERIES – Yokohama Baystars**

This campaign was focused around former player Carlos Ponce who returned to Japan to visit the club.

**SLAMTRACKER – IBM**

IBM’s SlamTracker product provides a real-time statistics and data visualisation platform for fans, detailing points, sets and matches as they are played at Grand Slam tournaments around the world. The product has been developed over several years and now includes a social media tracker, charting conversations about players during matches.
As the trusted partner in sports and entertainment intelligence, we offer a single source of industry leading research, monitoring, analysis and consultancy. With over 30 years’ experience our global network and connected solutions support you in maximising your revenues.

Let’s get connected.

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