

WONGDOODY

First Edition — September 2024/25

The Fan Engagement Playbook

A Guide to Fueling Customer Growth
Sports & Entertainment



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Foreword

Digital has transformed how sport is played, consumed, and enjoyed. It has also created far greater complexity within the business of sport. In this evolving environment, understanding the root drivers of fan engagement is one of the biggest challenges facing sporting organisations across the globe today. Because a sporting organisations success always comes back to the fans; they are the lifeblood.

Fan engagement boils down to motivators and behaviours. Sporting organisations need to know their fans intimately, and find the right balance between the sport, player(s) and fan(s).

Fan's are not on the court, pitch or in the saddle of a [Tour de France](#) rider sprinting to ahead of the peloton. A fans engagement was once limited to watching on TV or from the side of the road, cheering their teams and players they hold dear, buying the related kits and jerseys.

With the evolution of technology and the level of data we've access to, we now have the tools and insight to design personalised experiences that put the fan in the saddle real-time and experience what it's like to be in the race. New value and push the fan experience more than ever before.

This fan engagement playbook is an opportunity to grow your audience and push your organisation beyond what we thought was possible.

\$403b

SPORTS INDUSTRY REVENUE
WORLDWIDE IN 2022



\$680b

PROJECTED REVENUE
WORLDWIDE BY 2028



55%

OF THE TOP 20 ORGANISATIONS ARE
PROJECTED TO OUTPERFORM THE
MARKET

3x

THE AVERAGE NUMBER OF SPORTS
APPS A UK SPORTS FAN HAS ON
THEIR MOBILE PHONE

30%

OF FANS OF WOMENS SPORTS ARE
MORE LIKELY TO ENGAGE WITH
BRANDS INVOLVED VIA SPONSORSHIP

Managing complexity and a changing landscape in sport

With the new seasons of 2024/25 already underway, fans expect more than ever before. Passive viewership, is no longer enough to grow and maintain a sport. Sporting organisations, institutions and teams are more switched on and more savvy than ever. Teaming up with streaming services to grow the entertainment factor with live-streaming, generative artificial intelligence (AI), real-time analytics, celebrity commentary, gamified virtual environments, loyalty programs, bonus content across a myriad of platforms and technology enhanced real-life experiences at stadiums.

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What you need to know about fan engagement in 2024/25

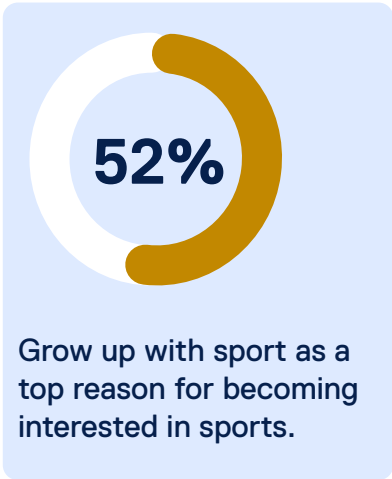
We took a deep dive into fan engagement through a study of 2,000 fans globally, including Australia, and discovered some rich learnings about global sports fans.

Interestingly, we discovered that fans today aren't all that different from the fans of yesteryear; their "why" is all about community, social connection and the thrill of sport. How they engage with sport is slightly more complex – and different for different people – demonstrating the need for a strong digital fan engagement framework.

Read on to explore the latest trends, be inspired by global leaders in sport, and learn the path sporting leaders should take to operate with a fan-centric mindset.

Sports leaders

Be guided by your ‘why’ and ‘how’



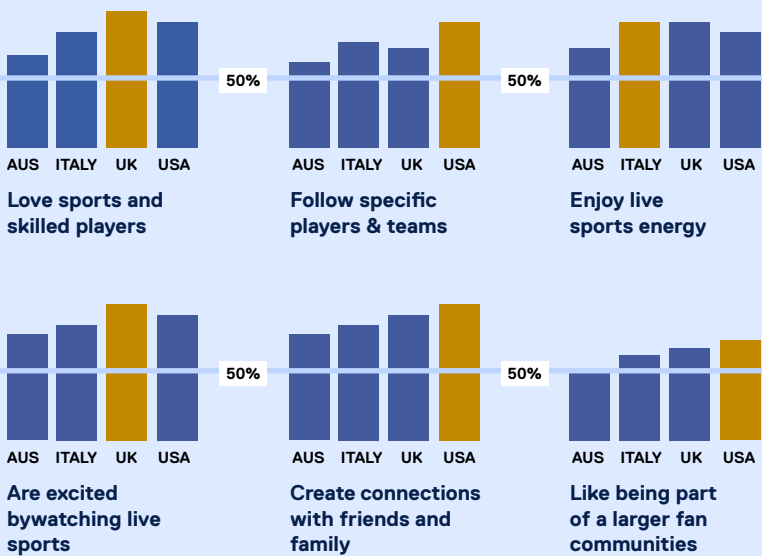
Why fans engage

Our research shows the reasons people connect with sport are universal and as old as time. It’s all about community, friendship, and the rush that only sport can bring.

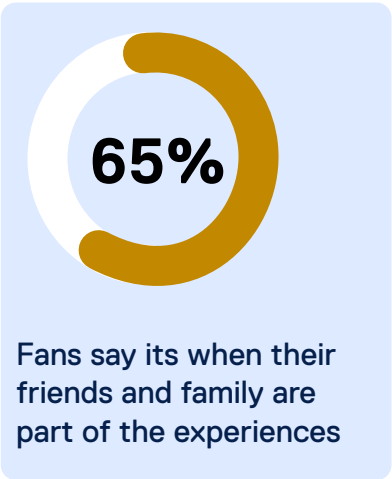
Fans in AUS, USA and UK rated **growing up with a sport as part of their family**, as their top reason for becoming interested in sports (52%).

Drivers of engage

Fan engage for different reasons which are consistent across the regions.



Social connection a key driver to engagement



When asked what their peak enjoyment and connection with sports is, 65% of Australian and American fans say is when their friends and family are part of the experiences, as compared to 58% in the United Kingdom and 48% in Italy.

Sport married with cultural rituals
[AFL](#) leverages this concept with the ANZAC Day and the Indigenous round, bringing timely cultural traditions onto the field. In the US, [NFL](#) is part of many families' Thanksgiving Day rituals.

AUS	UK	USA	ITALY	Paid Sports Streaming	
68%	70%	70%	67%		AUS, USA, UK and Italian fans are watching sports on 46 paid sport streaming services.
46%	59%	54%	51%		USA #1 ESPN+ UK #1 BT Sports
35%	40%	31%	50%		AUS #1 Kayo Italy #1 DAZN Italia

How fans engage

Digital engagement is undoubtedly the way most fans connect with their chosen sport, but this looks different for different people, places, and sporting codes. Get to know how fans engage with your sport.

Watching
[YouTube](#) was the number 1 way US fans watch sports, while broadcast and cable/paid services are the primary option for globally.

Formula One has created its own broadcast world for young fans

Kids watch the world's best drivers race and learn about the more technical elements of the sport in an easy format.

The broadcast is hosted by young commentators from junior karting world, simplified graphics and easy to understand explanations to engage a new generation of fans.

Fan expectations, emerging trends in sport

It's one thing to know which platforms fans seek out, to know what they expect or need from those engagements. Our research asked fans globally what they expect from their sporting experiences. Trends related to atmosphere, celebrity, and broadcast flexibility emerged as top priorities in 2024.

1. When asked to rank their top factor for enjoyment, 42% of all fans responded, it was a specific player. Fans want to know more about their player's social stance, values, training regime and personal stories/relationships.

2. There's a direct correlation between participation in sport and fandom. Playing a sport leads to greater understanding, leading to higher levels fandom.

3. Fans want flexibility in their broadcast experience - 43% would opt for no commentary, preferring to hear the match noise/atmosphere.

4. Atmosphere is a substantial driver of enjoyment — during fan interviews, there were 57 direct atmosphere mentions.

These emerging trends in global digital fan engagement will soon become standard fan expectations.

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Harnessing Sporting Rituals

The Fan Engagement Playbook

Personalised broadcast & streams

Sport Married with Cultural Rituals

AFL leverages this concept with ANZAC Day and the Indigenous round, bringing timely cultural traditions onto the field. In the US, NFL is a Thanksgiving Day ritual for many families.

The empowerment of fans to become their own producers aligns with fans expecting intimate control of their sports experience. Fans are looking for freedom to choose their own perspectives.

Fans choosing camera angles

Multiple camera streams

Multiple commentaries

AR Data Visualisation

Mixed Reality (MR) broadcast

Consider accessibility

According to a Stylus report, 59% of global sports fan had trouble finding or affording sports content they want to watch.

56% would watch more sport if it was more accessible

Think about the diversity of your audiences and tailor content to their specific needs.

Backstage access

Fans embrace the opportunity to step “inside the tent.” The ability for players, coaches, and teams to share and connect with fans away from the arena and sometimes within it presents the athlete in their complete form.

Behind the scenes (BTS)

Player’s social channels

Storytelling productions

Digital communities

e.g. Discord, WhatsApp, Reddit, Twitter, Threads

Documentaries

A mobile passport

Mobile devices serve as a patron's digital to the event journey, enhancing the experience for fans. A seamless event experience for patrons creates a ripple effect towards global fan engagement.

Real-time replays in arena and app

Biometrics

NFTs as subscriptions

Personalised way-finding

Live-stream from phones to main screen

Data driven immersions

Enhancing the fan experience through data and information allows by sport to be viewed through a data rich lens those seeking to learn or better understand the game.

Fantasy

Fan vs, athlete performance data

NFT Collectibles

AR data visualization

Player and match data

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Artificial Intelligence Opportunities

The Fan Engagement Playbook

The artificial intelligence opportunity

Sport is a numbers game. Media and spectators thrive off the speeds, the shots, the meters covered, the records broken. Generative AI has a natural place within sport, helping to create rich, data-driven, ‘phygital’ experiences.

AI-driven fan experiences in 2024

The 2024 [Australia Open](#) tournament was a master class in interactive engagement, transforming passive viewers into active participants. It was a record-breaking year, with more than one million fans passing through the gates of Melbourne Park. Dwarfing those attending physically were the tens of millions that watched and engaged with the tournament online who through a range of interactive fan experiences. This year’s ‘phygital’ experiences.

Masters Golf

This year’s [US Masters](#) introduced Gen AI capabilities to its [Masters app](#) and Masters website experience, leveraging AI to produce shot-by-shot “Hole Insights”.

The moment a ball comes to rest, the x, y, and z coordinates are captured, analysed, and compared against eight years of Masters historical data.

The generative AI model can produce predictions based on each shot location such as the percentage of players that make birdie. It also uses similar AI capabilities to add spoken narration, in both English and Spanish, to more than 20,000 video clips of every shot in the tournament.

WNBA

Capitolising on the sports boom and the global market for women’s elite sports is projected to hit US\$1bn for the first time in 2024, the [Women’s National Basketball Association](#) has introduced chatbots to personalise and streamline the burgeoning fan experience.

Leveraging existing platforms to assist, answer questions, help with ticketing, engage in friendly conversations and improve game day experiences can dramatically reduce cost and speed up delivery.

Stats that tell a story

[Match Centre](#) launched a new feature this year, powered by Generative AI, called “match bytes”. It takes thousands of data points throughout a match to create match story visual cards – which showcase all the important stats in a single glance.

AI Bracket Challenge

Imagine a world where predicting tennis matches isn’t just a matter of gut feeling but a head-to-head duel with AI. The [Australian Open’s Bracket Challenge](#) is just that, a digital oracle where fans pit their predictive prowess against AI. It’s like having a crystal ball, but digital. At this year’s AO, thousands of fans tested themselves against the machines, to see who the ultimate fan was.

Virtual Slam

The Australian Open is not just about watching the game; it’s about being in the game. Enter the [Virtual Slam Game](#). Picture yourself playing in the Rod Laver Arena... except you’re on your couch. It’s virtual, it’s real, it’s virtually real! This level of immersive experience is what every brand should aim for, breaking down geographical barriers and bringing the product (or in this case, the court) to the consumer.

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Unique Audience Engagements

The Fan Engagement Playbook

Build your fan engagement framework

The complexity of digital fan engagement means organisations need support to uncover and make sense of the data, leverage identified opportunities, and ensure efforts are relevant and valuable.

The framework has four layers to understand the diverse needs of fans.

Motivators (Why)

Motivators address a basic but highly relevant principle: Why do fans engage with a sport? They provide the foundation for knowing why fans act the way they do. Delving into this area will identify drivers like social connection, story/drama, entertainment, and atmosphere

Behaviours (How)

While traditional sport “engagement” models have focused on these concepts of “Participate, Consume, Interact”, we have evolved and adapted this to ‘Participate, Consume, and Interact’ – to address new digital interaction behaviours. Understanding behaviours will help to explain a fan’s journey into a sport and all the relevant factors that drive behaviour.

Channel (Where)

Channels are where fans engage. These include traditional broadcast channels, OTT & CTV (streaming services), podcasts, social, web, and app. Also included are owned channels, official partner and broadcast channels, as well as third party channels. An understanding of the channel landscape allows for the right experience to be designed, for the right fan.

Content (What)

Content is the fourth layer of the DFE Framework and identifies what fans are engaging with. Content can be entertaining, informative, or instructional. It’s what fans engage with. It might include match, player, and event content, as well as the information fans engage with when they are interacting with an organisation, such as purchasing tickets, ordering food, and planning their event experience.

Each layer of the DFE Framework value is unlocked when all layers are understood and delivered as a combined strategy.

“The digital fan engagement framework is a best practice structure developed to guide a sporting organisations market research and assist in better understanding the modern, complex nature of fan engagement.”

Operating with a fan-centric mindset

The DFE Framework essentially hinges on a single core commitment within a sporting organisation to operate with a fan-centric mindset. This might look like taking inspiration from these sporting organisations that are making the most of their fans' engagement journeys and finding new ways to connect digitally.

Inside story

Globally, sporting codes globally are personalising the true experience of elite sport using players and coaches' real-life recounts as vehicles. NFL wide receiver Michael Pittman documented his rookie season on his own channel, while emerging boxer Ryan Garcia is known for uploading training footage and fun, creative collaborations.

Personalised Broadcasts

Manchester City and software partner Intel introduced a capability to allow fans to toggle their viewing between up to three perspectives from a single frame of a play on the pitch. This immersive use of volumetric video is now in production for other sports clients.

Backstage Access

"Drive to Survive" has arguably had a more significant impact on sport than any other documentary. The documentary was commissioned by Netflix and has enjoyed multiple compelling seasons. When the third season was released in 2021, it took a few days for it to become the most-watched Netflix show; in the US, where homegrown motor sports such as Nascar and Indycar are preferred, saw ticket sales for the Miami Grand Prix witnessed a 15% rise. Similar backstage access documentaries such as 'The Last Dance' with Michael Jordan, "Full Swing" with the PGA, and "Quarterback" which tracks some of NFL's top stars, tap into many fan motivators like social sharing, drama, aesthetic, learning, and celebrity.

Mobile Passports

Stadiums across the US (including Yankee Stadium and Madison Square Garden) now offer biometric entry through the "Clear" app; Fans take a "selfie", lodge it in the app (which is synchronised with the ticketing database), and head to the "Clear Lane" to gain rapid entry.

Mobile passports are becoming the norm and, increasingly more sophisticated, not just for ticketing but as an all-access tool and engagement mechanism.

The importance of organisational buy-in around fan-centricity cannot be understated. It's a fact that organisations which place fans at the heart of their operation achieve better engagement and bottom-line outcomes.

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Learn by Doing

Formula 1 Australian Grand Prix

An all-in-one digital experience

Digital opens opportunities to understand engagement months in advance.

Delivering dynamic content based on audience interests and location, then augment that based on proximity to the actual date of the event — curating content for pre, during and after to activate much longer tail engagement.

Following a COVID hiatus, the [F1 Australian Grand Prix](#) not only revived the event; it did so by dramatically simplifying a complex and business-focused ticketing tool into a re-imagined customer engagement platform, offering greater audience engagement and increased purchases.

This new digital platform created anticipation months in advance, helping to drive participation and interest.

The aim was to bring the world of F1 closer to current, occasional, and new fans by building cultural relevance and associations with passion points and references outside of sport, such as music, fashion and film. F1 AusGP successfully created a whole of event experience within a single digital ticketing tool that encompassed not just the sport itself, but the entire experience around F1. The tool also sets the organisation up to connect with audiences 365 days a year.

F1 AusGP finished #1 for sport of the day, and #1 in its timeslot. The race claimed the highest shares since 2008, in total people with a commercial share of 56.6%, as well as key advertising demographics of under 50s (65.2%), 25 to 54s (64.9%) and 16 to 39s (63.6%).

4x
Subscribers

Increase year-on-year from 2020 onwards

\$268
Million

Credited with revving up the state economy over a whopping 57%, or \$97M increase on last year.

3.2
Million

National viewers, with BVOD reach up 30% compared with 2023.

NFTs Yes or No?

From subscriptions to collectibles, NFTs (blockchain based Non-Fungible Tokens) are now commonplace with the big markets and teams, offering fans and collectors access to exclusive content, unique experiences, and opportunities to own iconic moments in sport. The NBA's blockchain based trading card platform creating [NBA Top Shot](#) is a great example. Increasingly, NFTs are moving from shares in digital assets to physical assets opportunity in your marketplace for monetisation.

But tread with caution; many sports organisations are still grappling with baseline digital experiences like ticketing should be a priority. By following the DFE Framework, you will soon understand if and where NFTs might work for you.

Mixed reality immersion

With the cost of sports events, and post-pandemic, audiences curiosity for alternatives, the virtual environments has grown. These alternate fan experiences can build on the atmosphere of real-life games or enhance spectator interaction, audio and visual immersion.

Connecting VR to VIP access to tickets sales, promotions, exclusive content opens the doors to retail strategies and more revenue streams opportunities.

The UK's [Premier League](#) (EPL) announced a [new VR headset](#) for fans to play on a VR pitch, using match data to recreate famous moments.

America's [NHL Roblox](#) lets fans live in the VR world. In the US, 66% of millennial and 62% of Gen Z fans would pay to watch game from an athlete's point of view.

[Apple Vision Pro's](#) (XR) headset, expands on the promise of mixed reality, pushing spacial computing into the commercial market with the [Major League Baseball](#) (MLB) and National Basketball Association (NBA) apps.

Watch parties

At home sports viewing can become more dynamic, connecting peoples beyond the TV, adding multi-screen stats, quizzes connected to games and joining fans across households to enable communal watching for fans in different locations.

Intersect key brands

Dialing into brands through loyalty rewards opens up greater engagement by rewarding fans and connecting hand picked sponsors talk to target audiences.

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Creating your own playbook

Developing a DFE Framework

The “Sportstainment” factor

“Remember, sport isn’t just a game, it’s entertainment! Ensure your digital framework connects to the broader economy of sport and your fans’ cultural context.”

Remember, sport isn’t just a game, it’s entertainment.

Gaming

Started with [PlayStation](#). Now metaverse gaming platforms like Roblox are introduce kids to sport and their favourite players earlier.

Food and fashion

Thoroughbred Racing is as much a place for fashion enthusiasts as horse lovers. Aussies fork out millions on outfits, hair and makeup for [Melbourne Cup](#) events across the country.

Tourism and hospitality

The AFL’s Gather Round initiative brings all AFL teams to play in South Australia over one weekend, contributing \$80M to the local economy, building off the NRL’s Magic Round in Queensland people travel across the country to attend games, while local businesses invite interstate colleagues for joint business/football events.

Restaurants and hotels across the city are typically booked out for this weekend, forging a long-lasting cultural tradition.

Entertainment factor

[LIV Golf](#) league has exploded on the scene, going against the grain of long-standing golfing traditions. A team format breeds new competition and rivalries, shotgun starts, shortens the length of play for an increasingly time-poor audience. Music blaring on “party holes” make fans part of the action with a vibrant digital broadcast that brakes the mould of traditional golf for a younger audience.

Be controversial, be loud, be fun, be fast -
a master class in sportstainment!

Test your own playbook

The 2024 Fan Engagement Playbook provides a comprehensive guide to navigating the complexities of digital transformation in sports, emphasising the pivotal role of fan engagement. By leveraging AI, personalised content, and immersive technologies, sports organisations can create deeper connections with their audiences. As sports leaders aim to enhance their fan engagement strategies, consider the following key questions:

1. Have you developed a Digital Fan Engagement Framework? Understanding fan motivators, behaviours, channels, and content is crucial to creating personalised and engaging experiences.

2. Are you embracing AI and data-driven technologies? Utilising AI for personalised stats, interactive predictions, and immersive fan experiences can deepen engagement.

3. Have you created off-field experiences? Introducing diverse activities and entertainment options beyond the main sporting event can attract a broader audience.

4. Do you offer personalised broadcast options? Allowing fans to control their viewing experience with customisable camera angles, commentary, and interactive features can enhance engagement.

5. Are you adopting a fan-centric mindset? Ensuring organisational buy-in to prioritise fan needs and preferences can drive better engagement and business outcomes.

By addressing these questions, sports organisations can better navigate the evolving digital landscape, foster stronger connections with their fans, and achieve sustained success.

Reach out to discuss how we can cut through your organisation to cut through the digital noise and better connect with your fans.



James Noble
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About James

A multi award-winning CXO who is recognised globally, James is an energetic force. He constantly pushes creative thinking and innovation by integrating technology into new and existing partnerships, and globally, within departments and stakeholders.

With his approach to strategic thinking enhances customer experiences introduce a diverse and complex world James has transformed a multitude of sports, brands and organisations over the years.

The average fan of sports and entertainment can enjoy an event from all angles, platforms, and locations without physically. James's visionary approach to delving into data and its intrinsic link to creating a more loyal and engaged customer experience has driven the enhancement of both digital and physical touchpoints. This has led to significant improvements in customer decision-making, engagement, and overall satisfaction. As a result, it has produced some of the most dramatic returns on ROI I've ever seen, while also delivering new highs in fan satisfaction and success.

About WongDoody

Creative Democracy® is at our core and shapes every aspect of our work. The unique lived experiences and perspectives of our people are crucial to maintaining that philosophy and powering our creative culture.

Increasing broad-based diversity in areas that have meaningful impact and translating those efforts into measurable equity is and will always be our shared mission. Our ongoing commitment to diversity, equity and inclusion seeks to create an inclusive environment where humans of all backgrounds and cultures feel a sense of belonging, are heard, and are empowered to be successful.

Ready to start a conversation?

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Future-proof Marketing

We enable engagement through integrated marketing by using AI, data, and insight-driven creativity.

Full-Funnel B2C + B2B

Campaigning

Branding + Content Marketing

AI-enhanced Creative Solutions

Performance Marketing

All-scale Live Commerce

Influencer Marketing

Social Media + Emerging

Channels

CRM Ecosystems

Marketing Automation + High-Vol.

Production

Experience Design

We design experiences that humans love, including products, services and platforms.

Service Design

Experience Engineering

Design Systems and Design

Ops

Retail Environments

Tech Analysis + Discovery

User Testing + Journey

Mapping

Solution Architecture

Experience Design

Immersive Experiences

We create immersive experiences for your customers to purchase, play and explore your brand world.

Real-time Unreal Engine 3D

Digital Twin CGI Modelling & Management

Immersive and Experiential

Digital Production

AR/VR/XR + Interactive

Production

VFX, Animation + Motion Design

Broadcast/Video Production

Social Content Production