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In collaboration with Federação Portuguesa de Futebol,

The future of fan experience: how will digital improve the fan experience?

Will it bring risks to enjoy the match itself?

New Generation of Fans

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Abstract

Fans' attention at football games is no longer focused solely on the spectacle of the game, but on everything that transpires around it, implying that fan experience tools must evolve to a more digitally inclined future. The individual work focused on the new generation of fans that's starting to change how football is perceived, causing a generational conflict between generations.

Our research indicated that the first step in developing an effective fan involvement strategy is to collect data that would provide a greater understanding of the fans' needs, subsequently followed by increasing fandom with focused and impactful content.

Keywords: Fan experience, Fan engagement, Digital Innovation, Football, Digital Content, Generation Z, Generation Alpha, Generational Conflict

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1. Introduction

In the dynamic world of football, the beautiful game that captivates billions around the globe, there is a growing challenge that can no longer be overlooked. Football clubs, while showing an impressive number of fans, often fall short in delivering a comprehensive definition of a "fan." Such a deficit transcends quantitative figures; it extends into the qualitative sphere, where the hearts and minds of fans remain largely uncharted territory.

However, this deficit is not the only challenge football faces. The structure of the football business, like many others, often falls into a unidirectional relationship with fans. With consumers holding the center stage, it is essential to address critical questions: How can we optimize this relationship? How can we enhance the fan experience? How can we obtain a deeper understanding of the multifaceted profiles with whom we engage? And what are the critical junctures where our investments in fan engagement can be further optimized?

Nonetheless, the foremost issue confronting the football industry, and one that we will predominantly address in this thesis, is a unique generational transformation. It's a transformation that reverberates with a resonance like never before, characterized by distinct consumption profiles:

A demographic bracket that currently ranges between 50 and 60 years old continues to consume football in a manner akin to the past two decades and is expected to do so for another 15 to 20 years; The digital generation, influenced by parents and friends, has an inclination towards a more traditional form of sports consumption. Yet, this generation exhibits a propensity for something beyond the industry's current offerings; A wholly disruptive realm wherein football must not only explain its relevance to this generation but also successfully market itself as a sport of choice. It needs to demonstrate why the sport, as we know it today, still holds appeal for this transformative generation.

This thesis delves into these challenges and transformations within the football industry. We also turn our attention to the unique position of the Portuguese Football Federation. It stands out as an exemplar, possessing qualities that set it apart:

One of the premier national football federations, excelling not only in the sporting arena but also in brand initiatives, digital innovation, and commercial endeavors; Boasting two or three generations of exceptional talent development, Portugal has consistently produced world-class footballers; While Cristiano Ronaldo once held the distinction of being the main attraction, Portugal now boasts numerous globally recognized athletes; The nation's allure extends beyond the football pitch, with Portugal offering a unique blend of tourism, lifestyle, and hospitality that resonates with many.

This generational revolution and all the characteristics around the Portuguese football guides us as we venture into the depths of football's digital evolution, fan engagement, and the pivotal role they play in shaping the future of the beautiful game.

In our research into the dynamics of the football industry, we sought the guidance of experienced experts to gain a deeper insight into the challenges at hand. In particular, we engaged in insightful discussions with Luis Vicente, an esteemed professional with extensive experience in innovation and technology in football.

2. The American Market

Sports have huge presence in the American culture. Americans are incentivized to practice sport since kids whether in their local community or in schools and universities which lead them to consume sport content at incredible rates.

On top of this, according to the study “The U.S. Market for Sports Innovation: Innovative Fan Engagement” by the Deutch Minister of Foreign Affairs the American market is one of the most important in digital innovation and, for that reason, to answer to the “future of fan engagement”

we must look to best example and try to understand what is done and try to replicate in other geographies, therefore, we use the American market as our benchmark. Hence, we going to analyse how the leagues are structured, the main economic numbers and, most important, what is done in terms of digital engagement that might help to close generational gap.

2.1 The Most Important Sports

There are 5 major sports in the US: American football, basketball, ice hockey, baseball, and football, and unlike the most part of the world the last is not the most important. (Netherland Ministry of Foreign Affairs 2022)

When analysing the market in terms of most watched sports, the American football is the most popular by far with 50% of the American households assisting it, followed by basketball, baseball, football, and ice hockey with 5% to 25% of American households viewing them.

Although in terms of most played sports the ranking is the opposite. At the top we have basketball and baseball with 20 to 25 million participants at youth level, followed by football with 10 to 15 million and, at the bottom, the American football and ice hockey with 5 to 10 million and less than 5 million participants, respectively. (Netherland Ministry of Foreign Affairs 2022)

2.2 Leagues Organization

The 5 American professional leagues have different ways of organizing themselves. The NFL, National Football League, starts at August and ends in December and have a total of 17 games one per week. The NBA and NHL, National Basketball Association and National Hockey league, respectively, starts in October and ends in April and have a total of 82 games with an average of 3 games per week. The MLS, the Major league soccer, and Major Baseball League, MBL, they both start in March, but the MLS have a total of 162 games with an average of 6 games per week and the MBL have a total of 34 games with an average of 1 game per week.

With this system, periods without sport are avoided and the fans of all around the country have the opportunity to consume sport content during the entire year busting their fandom and, therefore, increasing the industry's revenues. (Netherland Ministry of Foreign Affairs 2022)

However, despite of their difference they have a lot in common. The leagues are closed and, therefore, there are no promotions or relegations, and new teams must be accepted by the league. Unlike European sport industry, the teams are franchises and if the owners decide, they can change their location which can be very harmful for the fans and for their level of loyalty (ex: in the NBA, the New Jersey Nets moved to New York city and change their name for Brooklyn nets) (Netherland Ministry of Foreign Affairs 2022)

Furthermore, all the American professional leagues are private and single-entity structures which means that franchises' owners are also the owners of the league and acting as shareholders of a private company choose a "commissioner", like a CEO, and all the investments are made in this "company", that controls the business, rather than a particular franchise. (Netherland Ministry of Foreign Affairs 2022)

This format was devised to prevent the self-destructive tendencies exhibited by owners in emerging sports leagues, driven by an overwhelming desire to win at any cost, often exceeding their financial capacities in securing athlete services. Additionally, this structure safeguards leagues against potential issues stemming from conflicts in managerial expertise among teams, particularly in the realms of talent assessment and marketing expertise. (Netherland Ministry of Foreign Affairs 2022)

2.3 Industry by Numbers

The US have the most powerful economy in the world, and revenues and profit are the main drivers for their economic decisions, consequently, the sports industry is not different and that's why is so important to decompose and analyse this topic.

The overall economic impact of the sports sector in the US amounts to approximately \$500B annually. The professional sports, college sports and youth sport generate 80B\$, 19B\$ (2019) and 12B\$, respectively. (Netherlands Ministry of Foreign Affairs 2022)

However, since sports revolves around its fans, the industry dedicates substantial resources to data innovation, fan engagement, and enhancing athletic performance to craft an unforgettable spectacle. The U.S. sports tech market is a testament to this, currently estimated at a staggering \$6.4 billion. (Netherlands Ministry of Foreign Affairs 2022)

In terms of revenues by sport, NFL has the highest revenue with \$16.9B which \$9.1B come from broadcast revenues followed by the MLB with \$10.7B which \$2.1B are broadcast revenues. The NBA is the third, with \$8.8B which \$2.6B are broadcast revenues. The last two are NHL and MLS with revenues of \$5.1B and \$1.7B which \$0.8B and \$0.01B are broadcast revenues, respectively. (Netherlands Ministry of Foreign Affairs 2022)

To increase the depth of the analysis, the total revenues can be divided into 4 segments: media rights, gate revenues, sponsorship, and merchandising. (Juulia Ronkko 2019)

In the years 2015-2016, a notable upswing in media rights revenue was foreseen, surpassing projections for gate receipts. This development was attributed to the integration of new distribution partners, prominent among them being major social media platforms such as Twitter, being an example of that the agreement between the last and NFL where the social platform was allowed to stream live 10 games without the consumer having to pay. In the 2022, the media rights revenue growth was \$10B for the NFL, for the NBA were \$2.56B and for MLB, NHL and MLS were \$1.8B, \$0.6B and \$0.1B, respectively. (Juulia Ronkko 2019)

In second place are gate revenues, anticipated to experience a compound annual growth rate of 2.2 percent from 2017 to 2022. The increase in gate revenues aligns with the expansion of

leagues, and the construction of new stadiums and facilities, yet it faces substantial competition from televised game broadcasts. (Juulia Ronkko 2019)

In the third position we have the sponsorship segment with \$16,658 million in revenues in 2017 and was projected to experience a compound annual growth rate of 3.9 percent and to support this expansion of opportunities are new inventory deals facilitated through digital media platforms, in-venue signage, naming rights, uniform rights, and involvement in the gambling sector. An example is the eight-year deal between NBA and NIKE with merchandising and marketing partnership that make the last the official uniform and apparel provider for the NBA. At last, is the merchandise segment with a total revenue of \$14,390 million in 2017 and a compound annual growth of 1.2%. This segment maintains a relatively stable performance, with any increase attributed to pivotal consumer product categories and widespread market penetration within traditional buyer segments. (Juulia Ronkko 2019)

Looking to the 4 segments the media rights and gate revenues are the most important ones and, for that reason, analysing each one of them is the next step.

2.4 The Future of Sports Broadcasting and Media Rights

Sports fans hope for more than just the games, they seek out content for a deeper connection, and access to insights, narratives, and behind-the-scenes glimpses will only enrich their passion. Consuming sports content extends their love beyond live events, creating a sense of belonging within a larger community of like-minded enthusiasts. Therefore, the primary focus should be on reaching the widest possible audience to boost revenues and this can be achieved through two avenues: traditional cable TV or OTT platforms which consist of delivering media content directly over the internet, bypassing traditional cable or satellite services which allows users to access a wide range of on-demand videos, movies, and live events on devices like smartphones, tablets, and smart TVs. (Deloitte ND)

Sports content is a huge source of income for the main broadcasters, whether Cable Tv or OTT platforms, and for that reason the competition for the transmission rights are fierce. Notably, out of the top 100 US broadcasts, a significant 89 were live sports in terms of same-day viewership. The Super Bowl and NFL playoffs led the ratings, with major sporting events like the Olympics and the NBA finals also drawing substantial audiences. In 2018, the top 10 most-viewed programs were predominantly sports-related, with exceptions like the State of the Union and the royal wedding. In terms of fans, 45 percent dedicate over six hours weekly to broadcast or streaming content. Nearly half of these devote at least six hours weekly to sports content from a single league. Among fanatics, the portion of weekly time dedicated to sports broadcast and streaming is even higher, and they are more than twice as likely to invest in sports-related broadcast and streaming. Specifically, fanatic subscribers spend about 1.5 times more than casual fans on cable subscriptions. Moreover, within the Millennial and Gen X demographics, fanatics spend nearly three times more than casual fans on streaming services for sports viewing. (Deloitte ND)

The cable TV operators despite of being the preferred viewing option for American families with 60.5 million households in 2023, have been assisting to a decrease in the number of households that pay for TV cable services, since in 2013 the number of households was 100.5 million and the prevision for 2027 is 47.8 million, and, the reason for this, are the higher prices charged by the operators (SportsPro 2023). Additionally, when we decompose the audience in Boomers and millenniums the research shows that significant portion (61%) of the millenniums will not choose as their favourite option what proves that in a near future this industry may lose is leading position if they don't innovate and fail to find new ways of attracting fans. The main problem with TV cable companies is that the American consumers cannot pick or choose which services they want to pay for, therefore, or they the pay for all bundle, which include all the

channels even the ones that consumers don't want, or they don't have it at all. The huge importance of sports channels for the audience, increase the average price of the cable tv services since this companies must pay to the channel operator a royalty fee for every customer, based in their perceived importance in attracting and retaining that subscriber (SportsPro 2023). Two examples of that are the bidding war between Time Warner Cable and Fox Sports for the Lakers' rights that the first win and resulted in a 400% increase in fees for the consumers and the war between Dodgers, a MBL team, which wanted to create its own channel, the Sports Fox and Time Warner Cable which resulted in 8.35 million deal and a respective 1,100% increase in the fees.(Los Angeles Times.2016)

In a landscape where cable TV grapples with structural challenges, the competition in the industry is intense as over-the-top platforms vie for dominance. Their key advantage lies in the lower prices for these services and the capacity to choose the channels that thy really want and not be forced to pay for non-desire channels. Additionally, they also give fans control over viewing options and functionalities, like selecting the primary view or announcer set for the stream. In an era where personalized products are paramount, this feature provides a significant competitive advantage over traditional methods. Furthermore, consumers increasingly value the ability to watch on their preferred devices, especially among younger fans and with the advancements in 5G wireless connectivity and improving device screens, the trend of fans turning to mobile devices for sports viewing is set to rise. Currently, more than 10 percent of all fans and over 20 percent of Millennials opt for tablets or phones for their sports entertainment. (Deloitte ND)

In terms of fans' satisfaction with the available options, only 39% of the total fans are satisfied with the broadcast and streaming attributes and it is 15% lower than the fans' stadium satisfaction. This negative impression could drive fans away from sports, particularly in the

competitive entertainment landscape of today. Therefore, these two options must focus in satisfying the 3 core attributes, which are picture quality, followed closely by the ability to watch by the “best available device,” and the ability to do the basic fast-forward, pause, and rewind functions, but go beyond them as fans expressed interest in having the ability to customize options for their viewing experience which include ability to choose their announcers to choosing the camera angle they want to use to watch the full game. For example, more than 40 percent of fans indicated that the presence of real-time augmented reality (AR) stats on-screen would increase their likelihood to watch, and more than 54 percent of fans indicated that VR front-row seats would increase their likelihood to watch a game. (Deloitte ND)

Throughout the industry teams and leagues are adapting their offers to retain and capture more fans to fuel the increase in the revenues. In the Augmented reality field, the MLB has used Statcast to continue to advance their batted ball and pitch-tracking capabilities, enabling the increasingly popular launch angle and home-run tracking and the LA Clippers and Second Spectrum announced CourtVision for this season, allowing local subscribers to choose between viewing modes ranging from “player,” where expected shooting percentages are overlaid on players, to “mascot,” where animations such as thunderbolts and flexing giants appear on screen at relevant moments in the game. In terms of virtual reality, the NHL announced a partnership this season with NextVR to create new, exclusive VR experiences for fans, debuting at the All-Star game. In the subscription model, the NBA debuted an option through League Pass where fans can purchase the fourth quarter of games for \$1.99, and it is working toward an even more flexible purchase model. At last, in the announcer choice Amazon debuted a choice of announcers for its slate of Thursday night NFL games, with viewers given the choice between the Fox crew and the Amazon team, made up of the first-ever all-female NFL broadcast team. (Deloitte ND)

2.5 Stadium Experience

A great stadium experience can boost the fan loyalty which will result in an increase in the revenues. Therefore, improve the stadium experience must be one of the main points of the analysis.

Nowadays, stadiums face a fierce competition by virtual reality, broadcast, streaming and the multiple viewing option that the last options can offer. At time same, the stadiums' disadvantages remain the same, namely the price tickets and the time commitment. Thus, to attract and retain fans both now and in the future, stadiums must not only meet the fundamental expectations of fans, starting with the core four, which are the desire of a high-quality game, an exciting atmosphere, stadiums must be safe comfortable and clean and the view from their seats to match their expectations, but also enhance the overall experience, which consist in investing in the differentiators from the other options. The fulfilment of these elements will lead to more satisfied fans that ultimately results in "love it" fans becoming fanatics. (Deloitte ND)

The core four elements in the stadium experience are fundamental to build a dedicated and contented fan base, encouraging them to attend games in the stadium rather than opting for the convenience of watching from their homes since they are 50% more important for fans than the next closest aspect of the stadium experience and the good news for teams is that fans are relatively satisfied with these core four experience elements. Causal fans have higher degree of satisfaction of these elements but even though is still lower than the fanatics which mean that teams have space to improve and to turn causal fans into fanatics. (Deloitte ND)

Beyond the core for elements, there are the basic ones which include easiness to navigate, concessions options inside the stadium, if it is easy to access and exit the stadium and if its stadium concession provide a fair value for what the fan receive. The satisfaction with these basic elements is considerably lower than the core elements what means that this is an

opportunity for teams to improve and gain more fans. Ranking lowest in terms of fan satisfaction is the concession aspect. Historically, sports venues have been associated with high concession prices. However, there are notable exceptions, both within and outside the industry. For instance, Amazon Prime disrupted the notion of high unit prices and shipping costs yet has maintained consistent revenue growth. An example is the Falcons' owner Arthur Blank decided to drastically reduce concession prices in their stadium in 2016. After cutting prices by 50 percent, the Falcons saw an increase of 16 percent in overall fan spend in the stadium. Additionally, the number of fans entering the stadium two or more hours before kick-off increased by an average of 6,000 per game, demonstrating the power of addressing key areas of fan dissatisfaction within the stadium. (Deloitte ND)

Despite the importance of the basics and core elements there are still an entire world to explore and to make fans keep coming to stadiums and spending more money. There are experiential elements that includes Personal identification with the team, have experiences that are unique to the stadium that match their personal interests, live entertainment options before, during, and after the game, and the opportunity to sit with fans who share their interests that must be addressed since the overall satisfaction with this element is quite low. The personal identification is still the most important one but for the younger fans, the millennials, this is far less important than for Boomers. For that reason, stadiums must adapt the experience to the future generation of fans that value more the ability to have unique experiences within the stadium, having experiences that match their personal interests, live entertainment options before, during, and after the game, and the opportunity to sit with other fans who share their interests but always maintaining loyalty among the older generation. (Deloitte ND)

However, increasing the satisfaction of these elements is not just bringing bigger entertainment names, doing more interesting giveaways, or setting up specialized fanatic sections in the

stadium, what teams should focus is in the personalization and understanding of what fans really want. Furthermore, teams must look to communicate these options in a cohesive and coherent way that speaks to each fan as an individual, emphasizing the true personalization of the experience.

Regardless of the other elements, there are still attributes such mobile use and apps Wi-Fi access, and personalized attention from staff members that are at the bottom of the fans' importance list and have the lowest satisfaction, but still represents an opportunity for teams to invest and attract more fans. Teams and leagues have the chance to pioneer offerings for a fan base that might not have a clear idea of what they desire. Assisting in making the most of the considerable downtime between plays, timeouts, and periods in stadiums across various sports can enhance the value of what might otherwise appear as idle time. So, the key idea behind these elements is to integrate seamlessly attributes with the rest of the stadium experience without encroaching on the excitement of the stadium atmosphere. An example of that is the San Francisco 49ers that recently rolled out a new mobile app specifically intended to address several of the key pain points for fans within the stadium. The app helps fans before they arrive at the stadium, integrating parking access, before serving as the home of the mobile ticket and providing directions to seats and other key areas in the stadium. Beyond saving time getting to seats, the app addresses the common concern regarding waiting time for concessions, providing an option to order through the app for express pickup, in addition to the in-seat delivery option—something that 60% of fans said would significantly improve their likelihood of downloading the team's mobile app. The app has led to \$2 million in increased revenue for the team along with adoption six times the industry standard, providing the team improved data to go alongside revenue improvements. (Deloitte ND)

2.6 Younger American Fans

Football is not the Americans' main sport, however, its popularity has been increasing since the 90s, especially, due to organization of the 1994 World Cup. Therefore, it's extremely important to analyse what are the main drivers for their fandom in order to be more prepared to attract the younger for the football environment.

What motivates the younger American fans is not different from younger fans in Europe, however, there are some key differences, primarily related with the main reasons for interacting with the game which highlight the importance of family and friends, fitness and participation, club influence and events. (ECA 2022)

American families are crucial point for the level of fandom but unlike Europe it is not for tribalism but more about participation. The main reasons for family influence are that they encouraged younger to play and practicing sports is one way of being closest and spending more time with their families (ECA 2022)

Finally, the clubs' success and major football events are vital for young American fandom, with 39% of Americans saying that clubs' success is on their top 3 most important catalysts and 28% saying that they were influenced by a major event. (ECA 2022)

2.7 SWOT Analysis

Strengths: The major strength in the American sport market, is that, even though younger generations have more access to other forms of entertainment, sport content, namely live sport, continue to have a huge presence in American households and consuming sports content continue to be one of the main sources of entertainment. An example is that out of the top 100 most viewed US broadcasts, 89 were live sports. Additionally, the extraordinary revenues coming from the industry clearly shows that this is reliable and mature industry. Moreover, the leagues' organization, where the last are private and the franchises' owners are also the owners

of the league and act as shareholders of a private company avoid self-destructive tendencies and potential issues coming from conflicts in managerial expertise among teams, is another strength since the leagues are only focused on the “business” and create innovative of earning money.

In terms of stadium experience, the satisfaction with the core four elements is quite high, especially in the casual fans but even the fanatics have a high satisfaction rate, which is vital to build a dedicated and contented fan base, encouraging them to attend games in the stadium rather than opting for the convenience of watching from their homes.

In the media right landscape, the industry is assisting to a decline of the cable TV approval and despite of being the main broadcaster of sport content, mainly games, the industry is reinvented itself and creating new to reach fans and their needs. This structural change from cable TV to OTT shows the resilience of the industry which is by itself a strength.

Weaknesses: Despite the major strength, as any other industry the sport sector as their weaknesses. In terms of the leagues’ organization, franchise owners can change the location of their franchises whenever they want which can be very harmful for fan loyalty since dedicating time and money with their teams can be counterproductive because all of a sudden, their team is in another city, and they are not capable of following or supporting them. Moreover, only 39% of the total fans are satisfied with the broadcast and streaming attributes the fans’ stadium and his negative impression could drive fans away from sports, particularly in the competitive entertainment landscape of today. Finally, in the stadiums experience environment, it is important to highlight that the stadium’s historical disadvantage, time commitment and prices, remain the same, for that reason, in a very dynamic world keeping the same problems as 50 years ago can be very dangerous.

Opportunities: Since 39% of consumers don't like the cable TV and OTT features, a door for improvements in the sector is opened mainly in real-time augmented reality (AR) and virtual reality (VR) features which 40% and 54% of fans, respectively, says that with these new features their likelihood of watching sports increase.

Furthermore, the satisfaction with the basic elements in the stadiums is lower than the core ones, leaving a space for improvements in this field. However, beyond the core and basic elements, there are experiential elements that includes Personal identification with the team, have experiences that are unique that match their personal interests, live entertainment options before, during, and after the game, and the opportunity to sit with fans who share their interests that must be addressed since the overall satisfaction with this element is quite low and, additionally stadiums should invest in attributes such mobile use and apps Wi-Fi access, and personalized attention from staff members that are at the bottom of the fans' importance list and have the lowest satisfaction. Hence, stadiums must adapt the experience to the future generation of fans that value more the ability to have unique experiences within the stadium, having experiences that match their personal interests, live entertainment options before, during, and after the game, and the opportunity to sit with other fans who share their interests but always maintaining loyalty among the older generation.

Threats: Despite being one of the most watched contents, the younger generations, and the older ones as well, have an increasing access to other forms of entertainment and, therefore, the competition for their attention is fierce. With the increasing digitalization, the younger generations are not willing to spend 2 hours of their free time seeing a game because there are other innovative ways to spend their time and, for that reason, American leagues are forced to adapt and understand what the fans want, especially the younger generations, since they are the

future of the industry, because if they fail to do so, the future of the industry is at risk because without the fans there are no revenues and ultimately there is no industry.

In addition, in the media rights environment, if the cable TV and OTT fail to find ways of fulfilling the consumers' need the entire industry will lose as whole, since they will lose fans which are the heart of the business.

3. European Football Market

The European football market is a dynamic and diverse landscape, known for its rich history, and passionate fan base. In this section, the key characteristics of the European football market, fan engagement, and the role of digital technology are going to be explored. Furthermore, this study will include an in-depth segmentation of the European market because understanding the distinct characteristics of the various fan groups is crucial in tailoring personalized experiences that will, in turn, significantly increase fan engagement. (Barbu et al 2021)

3.1 Key Characteristics of the European Football Market

Europe is a continent where sports hold a special place in the heart of its inhabitants but football which is often referred as the "beautiful game" is the undisputed king of sports in this continent. According to Crolley & Hand (2013), Europe can be considered the centre of gravity of planet football.

The story of European football is filled with iconic moments. In Europe, football is not merely a sport, it is sometimes seen as a cultural institution. The chants, songs, and rituals in stadiums are not just used to express support for a club or national team but also used as a manifestation of identity and belonging.

The world's top football leagues, including for example the Premier League, La Liga, and Serie A, are all based in Europe. These leagues are recognized for their unique approaches to football. The English Premier League is renowned for its competitiveness and global reach, boasting clubs with fans worldwide. In La Liga, there is a high technical level, particularly with clubs like Barcelona and Real Madrid, which dominate European competitions. In contrast, Serie A offers a different style of football, with teams focusing on tactical discipline and defence.

Along the years, Europe remained the preferred destination for the world's top players. Football legends like Messi, Ronaldo, Zidane, Maradona and many others have showcased their magic skills at some of the most renowned European clubs. For several years, these players participated in a huge variety of European competitions, including the world's most prestigious football competition the UEFA champions league which was inaugurated in 1960 and is another testament to Europe's historical influence on football. According with the facts mentioned above, it is possible to identify the cultural significance, the historical significance and the diverse leagues and competitions as key characteristics of the European football. (Bundesliga n.d.)

3.2 Segmentation of the European Football Market: Modern Football

To establish a robust fan segmentation, it is essential to consider valuable insights regarding the frequency and depth of fan engagement with football. More specifically, assessing how frequently each fan interacts with the sport through various means, including watching matches, following competitions, reading football-related articles, actively practicing football, playing video games, and more, serves as crucial information for creating an effective fan segmentation. Furthermore, factors like attitudes toward football, including the intensity of interest in matches, allegiance to clubs or national teams, and other relevant variables, are equally vital inputs in this process.

According to ECA (2020), the segmentation of the European football market can be translated in six distinct fan groups: tag alongs, football fanatics, club loyalists, Icon imitators, main eventers, and fomo followers.

Football Fanatics (11%)

The Football Fanatics can be described as the fans that have a strong passion for football, they not only watch matches but also documentaries, newspapers, Instagram accounts related to football, and other TV shows related to the sport. This market segment is predominantly composed by males, constituting 69% of its demographic. Furthermore, this group is younger compared to other market segments, with 37% falling under the age of 35. (ECA 2020)

This category of fans shows a strong emotional connection with football, this goes beyond following just their favourite club or the most recognized competitions. They demonstrate a broadened interest by watching lower leagues and less recognized competitions.

According to ECA (2020), 47% of this group refers that for them football is not just a sport, it is a community, and these is key for their enjoyment of the game. Moreover, they state that their relationship with their football club is strong, with 59% saying that a defeat for their team significantly impacts their day.

Additionally, a significant number of Football Fanatics express a strong preference towards attending live matches at the stadium. This preference arises from the desire to experience the felling of togetherness that football offers. Moreover, another interesting fact about this type of fans is that they would rather watch their team competing against “big” opponents, even when the odds of victory are lower. This preference shows the profound passion of the fans for football, as they prioritize the spectacle over the outcome of the match.

Club Loyalists (14%)

Club Loyalists have very similar characteristics with the Football Fanatics with the primary distinction being the less holistic interest for the sport. Unlike Football Fanatics, Club Loyalists tend to centre their engagement predominantly on their respective clubs. Their primary reason for following football is to support their club. While they do extend their interest to watch major competitions and “big” matches. In other words, although this group maintains an emotional involvement with football as a whole, they show a greater interest on their own club and a comparatively lesser interest in lower leagues and less prominent competitions. (ECA 2020)

The Club Loyalists demographic is characterized by an older segment, with 70% of individuals aged above 35. Similar to the Football Fanatics, this group also shows a male predominance, constituting 66% of this demographic. (ECA 2020)

Icon Imitators (11%)

Icon Imitators refers to a type of fans which have completely different characteristics from the ones evaluated before, this group is characterised by a focus around players and teams. A major part of the fans in this group, follow a specific team or league but they also give a lot of attention to their favourite player, regardless of where they play. The Icon Imitators represent the youngest segment, with 53% falling between the 13-34 age group. Furthermore, the gender demographic is almost 50/50, with males representing 57%.

According to ECA (2020), 80% of the Icon Imitators say they play football at least casually, this percentage is higher when compared to any other group. The fact just mentioned, can be sometimes connected with their focus around players, as they watch their favourite players with the objective of improving their own performance.

Moreover, despite the main reason for these fans to follow football is still team-based their emotional connection with the sport is less strong, with 43% of these fans saying, “If my favourite team loses it does not bother me too much”. (ECA 2020)

FOMO (Fear of Missing Out) Followers (27%)

The FOMO Followers can be characterized by the fans who like the social aspects that the sports bring to their life, football is seen as way of entertainment that could be easily substituted by another sport or big event. This segment is also relatively young with 52% falling under the of age 35, and the male segment representing 54%.

A major part of these fans is only interested in top level football and have a low emotional engagement with the sports as they are less concerned about the performance of their team, or if a certain player leaves the club. Moreover, at a 44% agreement, the fans of these group stated that they enjoy the lighter side of football, like funny videos or social media “memes”. (ECA 2020) In simpler terms, FOMO followers enjoy the accessibility, entertainment, and moments with friends or family that football offers.

Main Eventers (19%)

Main Eventers refers to a type of fans that follow football to be entertained. They are not concerned about who plays for their team, who their opponents are or if their loses, therefore, it is possible to understand that their emotional engagement with the sport is much lower when compared to the type of fans evaluated before. In this segment, the demographics are characterized by older fans with 64% being over the age of 35. Furthermore, a noticeable difference come with this segment, which is the fact of female representing 52% of this group, the majority.

According to ECA (2020), 42% of these types of fans could easily substitute football by other forms of entertainment like TV programmes, or other live event. In contrast with the first segment (Football Fanatics) evaluated in this paper, Main Eventers enjoy the lighter side of football and engage with the clubs and players through social media, memes and funny videos.

Tag Alongs (19%)

The major reason for Tag Along fans following football is related with their partners or family members. This type of fans has a low emotional engagement with the sport with 68% of them stating that “If their team loses it does not bother them too much”. Their excitement about football increases around major events, such as big matches or tournaments.

Despite their lower interest for the sport, it is noteworthy that most of the Tag Alongs fans have heard of UEFA Champions League (UCL) and UEFA Europa League (UEL). For the fact just mentioned, it is possible to understand that major events serve as drivers to captivate the fans attention, possibly because they involve a larger audience, and the spectacle is guaranteed.

Another relevant fact about this segment, is that football could be easily substituted by other forms of entertainment, as a very significant percentage (77%) state that they would rather watch a TV programme, film, or other live event. Additionally, almost half of the Tag Along fans (47%) prefer to watch highlights rather than watching a full match, this is another representative fact of their passive relationship with the sport. (ECA 2020)

In terms of demographics, this segment is represented in its majority (65%) by fans over the age of 35 and are more like to be female (59%). (ECA 2020)

3.3 How is Digitalization Impacting the European Market?

Digitalization

In its essence, digitalization refers to the conversion of information and processes into a digital format. This involves leveraging a diverse range of digital technologies to convert relevant data or manual processes into a digital structure, offering greater efficiency, accessibility, and storage capacity.

The surge of digitalization has given rise to the emergence of innovative technologies like cloud computing, machine learning, artificial intelligence, and others. These technologies confer numerous advantages to businesses of every kind by extracting fresh value from collected data and facilitating the development of novel business models. (SAP n.d.)

Digitalization in Football

As mentioned earlier, digitalization significantly influences various businesses, and football is no exception. Despite the theoretical notion that digitalization primarily involves shifting manual processes to digital realms, its practical implications extend far beyond such a simplification. Digital transformation denotes the ability of businesses and industries to enhance the value they offer to their customers (in this case, fans) and develop products that more precisely satisfy their needs. According to PwC (2016), digitalization is rapidly transforming our world and revolutionizing the traditional product development process.

Given the vast amounts of data easily collectible and storable today, segmentation of customers becomes more manageable, enabling the delivery of personalized solutions tailored to their specific requirements. Furthermore, it is evident that digitalization has become an integral part of the football ecosystem. Fans now engage with their clubs through various websites,

applications, channels, and devices. A notable shift towards digital structures is observed in areas like ticketing and merchandise.

In the realm of ticketing, digitalization not only provides convenience for fans, as it eliminates the need to physically visit the stadium, but also enhances operational efficiency for clubs. Online ticketing systems enable precise tracking of sales, attendance analytics, and personalized offers for supporters. This shift represents a strategic move toward a more fan-centric approach, creating a seamless and tailored experience for every individual.

Similarly, the digitization of clubs' merchandise has expanded the reach and accessibility of team-related products. Fans can browse and purchase a wide array of items, like jerseys, with just a few clicks. Thus, this digital marketplace not only diversifies the range of available products but also allows clubs to analyse consumer preferences and optimize their merchandise offerings. (PwC 2016)

Furthermore, another impactful digital practice within the football ecosystem is the widespread use of social media. It is evident that nearly every club, competition, and federation now maintain accounts on popular social media platforms such as Instagram and TikTok. These platforms serve as channels for creating behind-the-scenes stories, sharing match results, highlighting key moments, and serving various other purposes. The presence of football entities on these platforms reflects a strategic approach to engage with fans in real-time, providing them with diverse and dynamic content beyond the traditional scope of matches. Additionally, the use of these platforms allows clubs to captivate more fans, like the Main Eventers or Tag Alongs, which actively engage with the sport through social media channels. (Daly n.d.)

For the reasons and facts previously mentioned, it is possible to understand that clubs need to be flexible and not shy from implementing digital processes into their strategy. Digitalization

should not be seen as a disruption for football clubs but rather as a pathway with significant potential for clubs to improve fan engagement and attract new followers. (PwC 2016)

How clubs use digital technology in Europe?

In today's football ecosystem, we witness real examples of clubs utilizing digital channels to enhance their business strategies. Globally recognized clubs, such as Arsenal, have significantly invested in digital platforms to deliver personalized experiences, aiming to attract and retain fans both on and off the pitch. The club leverages its social media platforms to offer behind-the-scenes stories about players, insights into the logistical aspects surrounding the team on match days, video content, photo sharing, and live score updates during matches. (Daly n.d.)

The utilization of social media platforms has become common across all major European football leagues. A notable illustration of this trend is evident in Real Madrid's approach. The club boasts an impressive total of approximately 270.7 million followers across prominent social media platforms, including Facebook, Twitter, Instagram, YouTube, and TikTok. (Daly n.d.)

In conclusion, the potential benefits of digitalization for football clubs are vast, contingent on their ability to discern and implement effective digital practices. By strategically leveraging digital tools, clubs can not only enhance their business operations but also attract new fans and foster greater loyalty among existing ones. Understanding the nuances of digital engagement is key to unlocking the full spectrum of advantages in the dynamic landscape of football.

4. Portuguese Market and Survey analysis

Football has garnered a diverse range of supporters. In an effort to better understand this multifaceted fan base, a comprehensive survey was conducted, yielding responses from 558

individuals. The demographic breakdown of the respondents included 353 males and 205 females, offering a varied perspective on the nature of football fandom in the country. Furthermore, we have divided our surveyed people in 5 groups based on different aspects of the surveyed people's personalities (Appendix 1). According to Tapp and Clowes (2002), the application of segmentation principles not only enhances our understanding of football supporter dynamics but also empowers us to deliver personalized content tailored to their preferences.

The "**Clubists**" constitute a remarkable 27% of the surveyed demographic. These individuals stand out due to their profound love for football, spanning across both club and national team competitions, though with a pronounced preference for the club. They are not the typical national team supporters, their relationship with the national team is more of respect than fervent passion.

However, their love for the game does not blind them to the allure of international football. When the national team takes to the field, they appreciate the skill and dedication of the national players, but the emotional fire that fuels their club support does not burn as brightly on the international stage.

Their pragmatic approach to fandom becomes most evident during major international tournaments, the "Clubists" tend to extend their support to a second national team once Portugal bows out of the competition, seeking to prolong their engagement with the tournament.

Furthermore, we have the "**All Football**" supporters, making up 22% of the surveyed population, embodying a pure and unadulterated love for the sport. Their passion for football transcends the boundaries of club and country, as they revel in the beauty of the game in all its forms.

These enthusiasts immerse themselves in football with a fervor that is both admirable and infectious. They find joy in club competitions and the patriotic fervor of national team matches alike, with no discernible preference for one over the other. They love football in its full sense. The “**Patriots**” constituting a substantial 32% of the surveyed population, present a unique perspective within the diverse spectrum of Portuguese football fandom. Distinct from the fervent club supporters and the all-encompassing football enthusiasts, the “Patriots” engage with the sport from a distance, their interest pique primarily during moments of national team significance such as during the Euro Cup and World Cup.

These individuals may not share the same zeal for regular football matches and club competitions, often choosing to spend their time and attention elsewhere. Football matches do not feature prominently in their daily or weekly routines. However, when the grand stage of international tournaments like the Euro Cup or World Cup unfolds, the “Patriots” find themselves drawn to the spectacle. Their engagement is not driven by a love for football itself but rather by a sense of national pride and patriotic sentiment. The national team's matches become a focal point, not for the sport, but for the opportunity to rally behind their country.

The “**Ronaldo’s**” make up a modest 4% of the surveyed population, they are characterized by their unwavering devotion to individual players, rather than to specific teams or the sport as a whole. Their engagement with football is intrinsically linked to the performance and presence of their favorite stars on the field.

These fans revel in the glory of their chosen player’s successes, finding joy and satisfaction in their on-field exploits, irrespective of the team’s overall performance. A goal scored by their favorite player has the power to lift their spirits, even in the face of a team loss, showcasing a unique form of fandom that is both personal and player-centric. Furthermore, the “Ronaldo’s” extend their player loyalty to the international stage, often supporting a second national team,

not for its playing quality or reputation, but because it features a player they admire. This highlights their ability to transcend national loyalties in favor of personal fandom, a trait that sets them apart in the diverse tapestry of football supporters.

The “Future Fans” represent 15% of the surveyed individuals, they are at the cusp of football fandom. They may not share the same fervor and passion for the sport as other supporter groups, but their engagement is influenced by social and communal ties.

These potential fans follow football primarily due to the influence of friends, family, or a sense of national duty, tuning in for major matches and important competitions. Their engagement is sporadic, yet it holds the promise of growth and deepening interest.

The “**Future Fans**” are viewed as a reservoir of potential, a segment of the population that could evolve into ardent supporters with the right exposure and engagement. They represent an opportunity for the football community and the national team to cultivate interest, nurture passion, and transform these casual observers into lifelong fans.

4.1 Survey Analysis

The study's initial objective was to find the motivations behind people's interest in football, examining variations across different gender and age groups. The findings, as detailed in Appendices 2 and 3, provide insightful revelations that not only affirm certain stereotypes but also highlight intriguing trends across demographics.

Influence of Age on Football Fandom

For individuals under the age of 17, the social aspect of football fandom is particularly prominent. A significant 57% of respondents in this age group allege the influence of friends or family as the primary reason they engage with the sport. This trend underscores the communal nature of football, showcasing how the sport serves as a social glue, bringing together younger individuals through shared experiences and communal viewing.

Contrastingly, as we shift our focus to the older demographic, those above 55 years of age, we observe a shift in motivations. For this group, the predominant reasons for watching football are tied to a genuine interest in the sport, with a particular emphasis on following their club and national team. This suggests a transition from social to personal engagement with football, highlighting how the sport's appeal evolves over time, becoming an integral part of an individual's personal interests and identity.

Gender Dynamics in Football Fandom

When dissecting the data based on gender, the study affirms certain stereotypical notions about men and football. A combined 68% of the male respondents cite following their club and national team, as well as a general love for the sport, as their main reasons for engaging with football. This underscores a deep-seated passion for football among men, highlighting how the sport is ingrained in their personal interests and leisure activities.

In contrast, the most common reason cited by female respondents for watching football is the influence of friends or family, reflecting a more communal and social approach to the sport. This finding suggests that for many women, engagement with football is often facilitated by social connections, highlighting an avenue through which their interest in the sport may be nurtured and developed.

4.2 Deep Analysis Through the Different Ages and Genders

The survey analysis delved deep into understanding the intricate dynamics of football viewership in Portugal, categorizing preferences based on age and gender to uncover the nuances of fan engagement across different demographics.

Preferences Based on Age

The data on football viewership across different age groups in Portugal reveals evolving preferences with age, showcasing a balanced interest in club and national team football among

younger fans, which shifts towards a more defined and polarized viewership in older demographics. Younger audiences (0-17) display a significant inclination towards event-driven viewership (36%), indicating the impact of social and communal experiences on their engagement with football. On the other hand, middle-aged fans (35-54) exhibit a strong focus on either club football or the national team (40% only follow National Team games while 29% of them only have interest in club football), suggesting a maturation of preferences and a solidification of fandom patterns.

Preferences Based on Gender

The data on football viewership based on gender reveals a pronounced disparity between male and female fans in Portugal. Men predominantly engage with both club and national team football, showcasing a comprehensive interest in the sport, while women are more inclined towards event-driven viewership or following the national team. Nearly half of the female respondents are primarily drawn to football during major games or events, underscoring the impact of high-profile matches on their engagement with the sport. On the contrary, a substantial majority of men maintain a balanced interest, following football consistently across different competitions. This divergence in viewership patterns highlights the gender-specific nuances in football fandom and underscores the necessity for tailored engagement strategies to cater to these distinct audiences.

4.3 Deep Analysis Through the Different Groups of Supporters

We have then decided to deeply analyze the five different groups of supporters to better understand what their behaviors and preferences are and how they feel about different aspects of the game such as its the social part and their emotional engagement with the national team.

Clubists

The "Clubists" group in the survey exhibits a distinct set of preferences and attitudes toward football, predominantly favoring club competitions over the national team, with 95% expressing this preference (Appendix 4). Despite their strong love towards the sport, a majority of 53% would still choose to watch a national team's game, indicating a nuanced balance in their viewership choices (Appendix 5). Social aspects of watching the game are important to a large 84% of the "Clubists", highlighting the communal nature of their football experience (Appendix 6). As predicted, 89% prefer watching significant national team games, even if the odds of winning are lower, showcasing their love to football itself (Appendix 7). However, their interest in the national team does not significantly hinge on individual players, as 83% claim their interest would not decrease if Cristiano Ronaldo were to leave the national team (Appendix 8). The emotional impact of the national team's performance on the "Clubists" is complex; while 30% still feel upset if the national team loses, a considerable 43% remain unaffected if their favorite player scores, indicating a layered and multifaceted relationship with the national team (Appendix 9).

All Football

The "All Football" group showcases a strong preference for club football, with 89% favoring it over the national team (Appendix 10). A substantial 70% prefer watching the national team's games, even when better-quality matches are available, highlighting their dedication to the national team (Appendix 11). Social aspects play a crucial role in their football experience, with 84% acknowledging its importance, underlining the communal nature of football fandom within this group (Appendix 12). Almost unanimously, 99% prefer watching significant national team games, irrespective of the winning odds, showcasing a deep-seated passion for high-stakes matches involving their country (Appendix 13). Interestingly, the potential

departure of a star player like Cristiano Ronaldo from the national team would not decrease the interest of 86% of this group, indicating a resilient and unwavering support for the team (Appendix 14). When it comes to the emotional impact of the game, 60% would still feel upset if the national team loses, even if their favorite player scores, revealing a complex and layered relationship with football, where national pride holds significant weight (Appendix 15).

Patriots

The “Patriots” group, as stated before, exhibits a pronounced preference for the national team, with 89% favoring it over club football (Appendix 16), reflecting their strong sense of national pride. Their commitment to the national team is further underscored by 78% choosing to watch the national team’s games over potentially better-quality matches (Appendix 17). The social aspect of watching football is crucial for this group, as 91% find it important, indicating that communal viewing is integral to their experience (Appendix 18). A majority of 96% prefer watching significant national games, even with lower odds of winning, highlighting their unwavering support for the national team (Appendix 19). The potential departure of a star player like Ronaldo from the national team would not affect the interest of 90%, reflecting a resilience in their fandom that is not dependent on individual players (Appendix 20). When it comes to the emotional impact of the game, 50% would still feel upset if the national team loses, even if their favorite player scores, highlighting a balanced emotional connection with both the team and individual players (Appendix 21).

Ronaldos

The “Ronaldos” group, characterized by their allegiance to specific players, exhibits a preference for the national team, with 69% favoring it over club football (Appendix 22). This preference is reflected in their choice of matches to watch, with 69% opting for national team games over others, showcasing their player-centric approach to fandom (Appendix 23). The

social aspect of watching football is important to a significant 85% of this group, highlighting the communal nature of their engagement with the sport (Appendix 24). A majority, 92%, prefer watching major national team games, even with a lower probability of winning, indicating their commitment to supporting star players on the international stage (Appendix 25). As predicted, all respondents from this group affirm that their interest in the national team would diminish if Cristiano Ronaldo were to leave, underscoring their player-focused fandom. The emotional impact of the game is complex; while a plurality of 46% would still feel happy if their favorite player scores, even if the national team loses, a substantial 38% would remain upset, revealing a nuanced and multifaceted relationship with the sport (Appendix 26).

Future Fans

The “Future Fans” group demonstrates a strong inclination towards the national team, with 92% expressing a preference for it over club football (Appendix 27). This preference is further emphasized by 88% of the group choosing to watch the national team's games, even when better-quality matches are available (Appendix 28). Since this group is characterized by not loving the sport, the social aspect of watching the game is crucial for this group, with 77% stating its importance (Appendix 29). A vast majority, 92%, prefer watching significant national team games, even if the odds of winning are lower and the potential departure of a star player like Cristiano Ronaldo from the national team would not significantly impact the interest with 81% of this group, indicating that their support is not solely dependent on individual players (Appendix 30 and 31 respectively). When it comes to the emotional impact of the game, a majority of 52% would feel indifferent if the national team loses but their favorite player scores, highlighting a balanced emotional connection with both the team and individual players (Appendix 32).

4.4 Digital Content

To conclude our survey analysis, we studied the preferences of football fans regarding their consumption of football content, with a particular focus on digital engagement and the viewing experience. The survey responses shed light on the impact of digital content and interactive opportunities on football viewership. A majority of the respondents prefer watching full games over highlights, with 75.4% choosing the immersive experience of a complete match (Appendix 33). Furthermore, more than half of the respondents, 53.8%, agree that behind-the-scenes content from the national team strengthens their connection to the team and encourages them to watch more games, highlighting the power of exclusive content in enhancing fan engagement (Appendix 34). Interactive opportunities during matches also play a significant role, with 46.8% acknowledging that it leads to more attentive viewership of the national team. However, the influence of digital content provided by clubs or national teams on overall football viewership is less clear-cut (Appendix 35). While 24.6% agree that digital content is a determining factor in their engagement with football, a combined 75.4% are either indifferent or disagree, suggesting that while digital content plays a role in enhancing the fan experience, it is not the sole driver of football viewership (Appendix 36).

5. New Generation of Fans

In the modern era, fans are seeking different ways for engaging in sports. The sports industry can no longer rely on their devotion to ensure that they attend games or events. This evolution is related to the growing number of younger generations who are outnumbering traditional fans. This group has different expectations and is something to strive for since they may offer an exciting new atmosphere and energy to stadiums and football in general. Therefore, organizations need to develop new ways to attract this age group and get them attached to the

sport. The book “Evolution of the Modern Sports Fan: Communicative Approaches”, edited by Andrew C. Billings and Kenon A. Brown, along with the chapter “The Passion that Unites Us All: The Culture and Consumption of Sports Fans”, written by B. Mastromartino, W.W. Chou and J.J. Zhang, incorporated in C.L. Wang’s book entitled “Exploring the rise of fandom in contemporary consumer culture”, both describe this continuous change that has been observed for the past years and explore new ways to connect with fans in the modern era, ultimately being a great inspiration for this part. Moreover, the study carried out by Stephen Mighton called “Generation Z and Attending Traditional Spectator Sports: A study of Contemporary Sport Consumer Behaviour”, allows for a better understanding of Generation Z in a sports context, where the interest in traditional sports is decreasing, describing an age group that marked the first steps towards new forms of engagement.

Additionally, this new generation can be found in every type of fan that we previously defined, including those who still live in Portugal and have become more accustomed to following the national team, young individuals who had to relocate to other countries for better opportunities, for example, but who still need to be engaged in our ways, along with those who do not yet follow football, whether in Portugal or elsewhere. Ultimately, based on our previous analysis as well as the academic resources provided above, this section’s main goal is to understand this still under looked segment of sports fans but that, in our view, represent most part of the future fans which explains our intention to target them in our analysis.

5.1 Young Fan’s Profile

Football’s Radical Change

Football has gone through a dramatic generational shift in the last several years, with an impact unlike anything the sport has seen before. For a long time, football fans were extremely basic

and local, they just supported a club and a national team as their primary emphasis when watching football, and they lived by this principle their entire lives. As football became more widely recognized around the world, other markets, particularly Asian, began to have a more volatile outlook on things. Since their country was not as established in this sport, they began following numerous teams from other countries that they enjoyed watching, and thus began to be recognized as a more global and versatile fan.

According to research from Sports Innovation Lab in Boston, today's fan has an entirely new consumption profile, designated as the "Fluid Fan." Considering a large portion of this generation was born during the period of innovation and social media, their perspective on sports is more complex and incorporates more factors. Modern decisions about how fans spend their time are based on a brand, a certain player, or a specific moment in a game, which is what drives these fans to invest their money and time in the sport (Sports Innovation Lab 2020).

Gen Z and Gen Alpha Sports Profile

Even though they have unique profiles, Generation Z and Generation Alpha share an urge to consume sports in a different way than their predecessors. With Gen Z replacing Millennials as the most numerous age group on the planet and Gen Alpha considerably expanding their numbers, it's time to start addressing their demands with greater urgency (Deloitte 2023). To further investigate this issue, data released from the New York Times said that just 23% of Gen Z claimed to be passionate about sports, compared to 42% of Millennials, with 27% of Gen Z indicating that they don't even enjoy sports at all (The New York Times 2022). As this emotional approach to sports has declined over the generations, it's safe to assume that the numbers might be considerably lower with Gen Alpha. Given this, sports organizations must

be creative in their content delivery to these generations with the goal to engage younger viewers through original technology, experiences, or content.

When it comes to Generation Z, the aspect that they value the most in today's sports world is the social interaction with each other as well as with sports individuals, which they mostly achieve through social media and technology such as dual screening. This factor makes them more inclined to support an athlete as a personality whom they follow on a regular basis rather than a sports team. This generation has a unique trait that they want to be acknowledged and taken into account, which explains their desire to have their own personalized experience of the game (Jakub Perdjon 2022). As for Generation Alpha, the fact they are digital natives helps to define this age group. Given their younger age, their attention span for sports in their purest form is very short, which means that their interest needs to be stimulated by moving into their environment and aligning with technology, such as gamification and esports as well as short video content, that are some of the interests that can involve this demographic to its full potential. Furthermore, this age group is particularly concerned about issues involving equality and the environment, which are two areas where sports may be an excellent vehicle for change and would undoubtedly pique their interest (Jakub Perdjon 2023).

The impact that these generations have had so far upon sports is notorious, it is fundamentally altering the way the sports business generates content and communicates with fans. Today, the desires and decisions of fans are the most significant driver in decision making because teams can no longer account for their unconditional loyalty as they could with previous generations, which means they must align themselves with this generation to retain their vital attention in the future. This influence will continue into the future, new generations will emerge with new methods to interact, and sports organizations will need to stay on top of these developments in order to remain relevant.

Why do they follow football?

For an in-depth understanding of these generations, I believe it is necessary to first figure out why they follow football in the first place, and then continue following it as they move from different points in life. According to a research report presented by The Footballco, the most recent generations have four main reasons to begin consuming football, which are the same reasons given to previous age groups, however, as the sport evolves, so do these key features, adapting to this new era in football (The Footballco 2023).

Participation → This definition includes every young person who begins to like football by participating in it, whether by playing or simply by watching games on a regular basis. It is also essential to acknowledge the contribution of esports to this generation as part of the reasons why people start enjoying this sport.

Heritage → In today's football, heritage is no longer a significant indication, cultural ties and historical associations with a sport, due to parents influence or others, are less relevant to this generation. However, it's important to keep in mind that loyalty is what sports organizations are really looking for, therefore this reason is just as significant as the others.

Socialization → Especially for Generation Z, socialization is an important foundation to start appreciating football. The game has the ability to bring together entire communities for a shared goal, and with the rising participation of social media, it is even simpler to create that interaction between people.

Access → This component is most closely related to what younger generations seek in an organization. Availability of innovative ideas and methods of displaying content, as well as access to stadiums and tickets, will give a better platform for individuals to get passionate about football.

Other Interests and Motivations

Ultimately, another unique trait of these generations is their commitment to key societal issues such as environmental and equality concerns. Given their worldwide scope and ability to reach millions of followers at once, sports organizations are under increasing pressure from these generations to commit to more sustainable behaviors. As their influence as sports fans rises, so does the tendency to pressure the industry to move towards environmental sustainability and net-zero causes (Deloitte 2023).

Furthermore, as sports organizations work toward these goals, opportunities to elevate themselves in the eyes of the public, involving partners and new sponsors, as well as to solidify and even attract younger fan bases, who are so committed to these concerns, become evident. Within these measures, particularly in football, numerous efforts may be implemented, such as switching to more sustainable energy sources in stadiums or reducing water waste while watering grounds, for example. With all these actions, organizations will begin to be viewed as role models throughout the world, and ideally will progress to a position where these issues are prioritized in decision making.

5.2 Problems with the Current Context

Generational conflict

Although younger generations are becoming the majority of football fans, it's critical to remember that there's still a large demographic range (mostly between the ages of 50 and 65) that have been watching football their entire lives and struggle to adjust to these new developments. This generation is averse of change and digital advances because they resent being pushed out of their comfort zone and having their methods threatened, which makes them afraid of these revolutionary ideas. Generational conflict emerges because this age group will

continue to consume football for the next 15 to 20 years, escalating the generational conflict as we move into the future. According to the ECA study analyzed before, between 40% and 50% of younger generations believe that watching football on TV is out of date, indicating that this digital generation still has their parents' influence, as well as some of the traditional ways to consume sports, just like previous generations, but they expect more from this industry than what they are willing to offer (ECA 2022).

With that in mind, the industry is now suffering a certain resistance to adjusting to this new environment as a result of this generational conflict. This generates a completely unbalanced space inside football where the answer may emerge by attempting to explain why football fan engagement, as it is currently carried out, is still extremely relevant for these older generations and that they are an important piece in this new era.

Barriers for the Future

Aside from the age clash, there are further hurdles that might delay or make it more challenging for younger fans to be engaged in football. In these circumstances, organizations must be aware of these barriers in order to better capitalize on potential opportunities that might arise as this generation becomes more noticeable. Following the study previously mentioned from ECA, I evaluated four different groups of barriers that might represent the biggest problems for the next few years (ECA 2022):

Culture → There are growing worries in modern football about fan behavior and culture at football events as well as online. As it's been a reality for a long time, rivalries are more than simply heated debates, creating an unstable and risky scenario for individuals who choose to attend games.

Costs → As organizations strive to create more engaging content, the expenses of implementing these innovations are substantial, ultimately resulting in higher ticket prices for fans. Considering we are dealing with younger age groups, some of whom may not even be financially independent, it is critical to demonstrate that the content we are presenting is worthwhile and that there is some return for fans overall.

Availability → Younger generations are less connected to a specific routine, and their availability to be present during a sporting event is no longer guaranteed as their concerns about various matters grow. This may present a chance to experiment with new methods of delivering short-form material to fans in order to keep them engaged with the sport.

Non-traditional sports → The emergence of non-traditional sports, which are variations on the same sport in general but have different styles and methods of delivering material, may be a future issue should football, a traditional sport, fail to properly adapt to cater to these younger followers. For example, Kings League is a new popular non-traditional football format that brings together online streamers and sports stars while playing football and is now shaking the market with its popularity among younger age groups.

5.3 Analysis for Portugal Fans

After an insightful conversation with Luís Vicente, former FIFA Chief Digital Transformation & Innovation Officer, where we discussed the differences between generations and subsequent generational clash specifically in Portugal as well as the reason for each age group to support our country, we believe it is important to narrow the analysis and apply it only to Portugal fans, characterizing them by specific events or generations that made a mark in our history and in the way we define our fans. Despite earlier accurate fan analysis in the work project, it is vital for this part to describe some of the age groups to have a better grasp of those we want to target.

In this section, we decided to approach three distinct generations of Portuguese football. The first age consists of traditional fans, who have supported Portugal for as long as they can remember merely out of patriotism. This generation is still attached to past moments of greatness such as the Golden Generation and Euro 2004 that defined the history of Portuguese football. As a result, they're the most hesitant to embrace change, which is why I chose not to include them as the target in this section, however, it's always important to remember that they are still vital fans for Portugal, so we must be cautious not to lose their attachment with significant shifts in the sport. Secondly, we identified the followers who grew up during the Ronaldo era, when he was the focal point of the Portuguese squad and attracted a large number of new admirers. As this period comes to an end, these supporters are still young, so they need new ways to be involved and a reason to keep watching Portugal which makes them a perfect target for the future. Finally, we have younger fans who meet the modern description of supporters as they are less interested in football as a spectator sport while more interested in what can be offered besides the game, so they need to be introduced to football in a way that suits their characteristics.

5.4 Target to Young Generations

Why target this generation?

As previously pointed out, this generation has unique desires and methods of engagement that are unlike anything the business has seen before. Given that, it's critical to understand why organizations and people involved in football are targeting a generation that will require so many changes. Aside from the fact that this generation is already establishing itself as the biggest demographic of potential fans, it is imperative to remember that they represent not only the present but also the future of fan engagement. Considering the previous analysis of the European market, accomplished with the support of the ECA study, it is important to note that

these new generations of fans are the most likely to be football fanatics, which for organizations reflects the segment that can generate the most revenue in tickets, merchandise or others, given their unreal attachment to the team (ECA 2020). Given that, targeting this age group and focusing our efforts on them will probably result in an increase in the proportion of fanatics, which might have a positive impact on the organizations' financials.

From now on, each new generation will be more complex and will bring new habits, which means that we can use the current scenario, which still has a significant influence from the traditional era, as a platform to begin building the future and adapting to this new reality. Otherwise, the industry will fall behind and be overtaken by other sports that are prepared for upcoming changes. Furthermore, I feel that organizations must take the appropriate steps to help these football fans thrive with the sport. Regarding this, football and its attitude to supporters must be flexible to this new generation with a strong sense of identity and a need to be heard. Likewise, this age group is more likely to go to abroad in search of better possibilities, therefore it is critical to retain these individuals and keep contact with those who are not in Portugal but that are still an important part of the fan base.

How to attract this generation?

The content provided by organizations is the primary driver of fan engagement for this age group. When addressing Generation Z and Alpha, the experiences they have beyond the games, which means their overall involvement with football, are the main drivers to better satisfaction. They want to be constantly engaged and motivated, as well as socially active as well as to be given access to a selection of events, this is how you can show them that investing in it is worthwhile. When doing that, the industry must use data to better understand fans' expectations, habits, and desires. Nowadays, the use of data in a centralized point of view is critical in fan

engagement as a method to transform basic information into a full experience for the fans, by breaking down their preferences and creating material that corresponds to it. For example, Real Madrid has already adopted a completely differentiated strategy compared to other clubs by analyzing their established data bases and previous models with the goal of better analyzing consumer habits across the media and create tailored experiences and interactions with fans, as a way to promote digital fan engagement (Deloitte 2023).

5.5 Digital Initiatives

Similar to the Spanish club's strategy, previously addressed, I believe there are several digital initiatives that, if properly executed, may truly elevate the experiences of this new generation, given that, this next part of the work project will address each of them with greater detail. Before going into it, it's necessary to mention some other initiatives, such as the use of Esports or the development of smart venues using VR and AR technologies, which, while still engaging and important to implement for this generation, will be addressed in other chapters of the work project, so there's no need to go over them again.

Gamification

Young fans need to stay engaged at all times, this generation often loses interest when not completely involved, hence gamification will provide them with just that, it demands their attention and interest for small amounts of time, but on a consistent basis throughout a week, a season, or an event. All these games, such as fantasy sports, quizzes, and prediction games, allow fans to be connected to the game until the very last second. Their aim for the match is not only about their team winning anymore, when they play, it also becomes about their performance in the digital game as well as the opportunity to connect with other players and share their interest in the sport by comparing outcomes (Fanisko 2015).

Moreover, another positive aspect of these projects is the collection of data about followers and the development of a stronger loyalty program. Individuals indicate their preferences and interact in certain ways when playing these games, allowing organizations to generate customized content to engage with these younger followers on a deeper level.

Betting

Much like with gamification, betting on a game promotes a fan's interest in that game, except that, unlike the previous initiative, when money is involved, the excitement in winning as well as the fear of losing is considerably stronger. These two ideas can even be put together, there are currently certain platforms that are developing fantasy games that need a fee for entry but have considerably greater upside. By combining these, users may select certain players who can earn more points with each play and so earn a bigger return. This will benefit both projects since gamification will attract more players and grow more competitive, while betting will have two primary platforms to choose from, with individuals potentially betting on both platforms for the same game (Ipsos 2021).

Many new technologies are being developed in order to provide a better and more thorough betting experience, with a few companies even looking at methods to leverage data from athletes collected during games to allow for sports bets on certain subjects. The main challenge with betting at this point is the underdevelopment of real-time betting, which still suffers from latency problems, which affects the fan experience. However, it is only a matter of time before that issue is resolved, and when it is, the opportunities for sports betting will be incredible, with billions of microtransactions taking place in a matter of microseconds.

Marketplace

One thing that sports fans believe is indispensable during the games is to display merchandise in support of the team or even to buy merchandise as a memory of a certain moment that they will cherish forever. Similar to the problem described with betting, there's an inability to explore real time, implying that there is potential to explore this sports marketplace notion in the future. If, during the 2016 European Final in France, t-shirts, balls, or other items commemorating Eder's goal were already available five minutes after the game, the possibility to sell would be enormous since people were completely obsessed with that moment. Being unable to develop business opportunities for official merchandise in real time is what keeps this concept untouched in many regions, although, especially in China, that quickness is a reality, the quality and authenticity of the products is low.

Once again, these initiatives can be combined with each other, in this case, gamification has a lot to gain with this concept of the marketplace, and vice versa. If there was a game that allowed fans to bid on different products, or if fans chose a specific player and he scored a lot of points, some type of discount would be applied for personalized items of that exact player, interest in the game would expand. These initiatives would keep fans interested on the game from the first to the last minute because there's always something to gain from it.

5.6 Case Study

In Different Industry - Music

The music industry shares plenty of similarities with sports, particularly in terms of fan engagement and relationships with consumers. Music, like the sports sector, needs to be listened to and appreciated by the fans, they will have a large impact on the song's success upon its release. However, the digital transformation that we are witnessing in football currently

challenged the music industry with the arrival of Generation Z more than a decade ago. As a result of their capacity to deal with the modern era, the sports sector should look to them as an example and an opportunity to perform even better in the future (Sports Innovation Lab 2020).

To better understand the changes in this industry, people have shifted away from conventional modes of music production, such as radio and CDs, towards more digital services, such as Spotify and several social media platforms. Aside from these, the younger generation in which Generation Z has the bigger impact, has completely different forms of connecting with music and artists, with concert livestreaming events or gaming as well as by following music trends in social media, changing people's musical experiences forever. The time when music could only be consumed through radio or visual media is over, music has changed to follow a new generation of fans and to reach a larger audience from now on.

As an outcome of these transformations, streaming has become the primary method of music consumption, even altering the way musicians release their songs, allowing Generation Z to be the generation most likely to listen to music. Social media has also played an important role, with around 56% of young people learning music through social media material, turning the radio outdated, since just 18% of this new generation listens to it (The Harris Poll 2021). The music business, like football, will continue to evolve in the future, with new ideas for live performances and streaming supported by AR and VR technological developments, following tendencies and expectations that change with these new generations.

In Different Sports - Formula E

Formula E is a remarkable example of a sport that was able to build an audience by focusing heavily on younger generations, drawing over double the number of fans aged 18-24 as general motorsports at this point. The transformation of this sport from a slower equivalent to F1 to an

elite and technologically involving motorsport is result of an emphasis on two beloved aspects of this new generation, the creation of captivating and appealing content and its dedication to environmental sustainability (Deloitte 2022).

Some of the efforts that fueled this sport's popularity were the use of social media, the potential for spectators to influence the race as well as the actual sport's virtual experience. For starters, the 'Fan Boost' initiative involved using Twitter as a voting platform for fans to select their personal preferred drivers, the three drivers with the most votes would receive an important boost in their battery during the race that could increase their chances of winning, which drew fans in considering their participation could help their favorite drivers win. Furthermore, other concepts included inviting professional Formula E racers to a gaming venue, where fans could meet and race against some of the sport's quickest drivers. All these steps contributed to Formula E becoming what it is today, having a big influence on younger generations and preparing for the coming years (Charlie Eustice 2016).

In Football - Valencia CF & Nigeria National Team

Valencia CF is recognized for having one of the oldest stadiums in the Spanish first division, established 100 years ago, but it hasn't stopped them from creating one of the most innovative and entertaining stadiums in the world in the last few years (Franco Segarra 2022). Their digital journey began with the creation of an Innovation Hub within the stadium, which provided space for entrepreneurs to concentrate on sports and technology developments. Collaborations between these start-ups resulted in new ways of displaying content as well as new infrastructures to improve the stadium's fan engagement experience during various moments of the game, and all that innovation came at no cost to the club because it also benefited the companies with visibility for their brand and their products. In this scenario, Valencia

accomplished the unimaginable by creating a wonderful atmosphere for supporters that should serve as a model for the rest of the globe (Global Fútbol 2020).

The National Team of Nigeria, on the other hand, became the second preferred team among fans in 2018, particularly younger generations, not for their technological impact but for their ability to connect with people on an emotional level, by demonstrating the country's influence around the world and culminating in a football shirt designed on that premise, which was heavily accepted and bought by global fans, bringing Nigeria to the center of the football world during that time (Bleacher Report 2018).

Concluding this individual topic, we believe that these generations can add the most value to football and are the ideal target for the Portuguese Association, so they must be engaged in ways that they have never been, something distinctive that will involve them with the sport, the organizations, or the players. It is critical to recognize that times are changing, without forgetting all the fans who have given so much to football in the past and will continue to do so until the end, so the steps must not be too large, or we will lose that identity that has been built for many years.

6. Digital Initiatives in Portugal: Opportunities and Risks

We intend to provide some innovative ideas, identifying some of its risks as well, for the Portuguese Football Federation in this section of our Work project. These concepts are based off real-world cases which ultimately relate to digital transformation, with each idea created for certain segments, among those designed with the help of our survey, in mind but with an overall intention to target all fan segmentations, and their primary goal is to provide each fan with the greatest experience possible while showcasing the federation's constant loyalty to its supporters.

This study identified the first opportunity associated with the United States hosting the 2026 World Cup: as one of the technologically most advanced nations, it is home to the world's largest technology companies and serves as Portugal's primary hub for start-up investments. We would have a unique opportunity to create a scheme with disruptive ideas from people who are not contaminated by the industry by promoting these Portuguese companies and the Portuguese entrepreneurial movement in the nation that leads the world in entrepreneurship combined with football – the 2026 World Cup. The Federation would become one of the most technologically advanced federations in the world as a result of this alliance with tech companies, enabling it to expand all of its capabilities in terms of data performance, analytics, strategy access tools, data BI, and other technological tools.

In addition, we saw the chance to expand this technology-related initiative since Portugal will host the 2030 World Cup. This would enable us to continue these partnerships for an extended period of time and provide Portugal with improved and innovative ideas for the competition in 2030. This is a unique opportunity to use the examples of the 2026 World Cup, in one of the most technologically advanced countries in the world and create a model for 2030. We know that the country is ready to host the World Cup in terms of infrastructure, but the country is not yet sufficiently developed in terms of innovation technology, fan engagement, and fan experience.

6.1 Rings of Fan Engagement

The dynamics of the digital sports world are more comparable to other industries than they appear. Just like in any other business, a fan wants to invest his money in something that will provide him with a specific return, in this case, an enjoyable game experience. People have varied methods of watching a football game, with some preferring to watch the game live in the stadium while others may not even like watching the whole 90 minutes. In fact, based on a

study from the Global Sports Innovation Center (GSIC), we decided to sort these types of fans into four different rings, more adjusted to Portugal and its fans specifically, to better understand how to get to them and monetize fan involvement (GSIC 2021).

Ring 1: Inside the stadium → A unique experience inside the stadium, where the outcome may be better for some than others based on a variety of factors. The information on the spectators watching the game is clear within the ticket purchasers or season ticket holders in these cases.

Ring 2: Outside the stadium → People encounter the same reality as in the previous ring, but this time outside the stadium, with most people watching on TV but also in fan zones or game-related events. In this scenario, we don't know who is watching the game because the data is virtual and frequently deceptive in terms of the number of spectators.

Ring 3: Live social media → Personalized viewing of the game via live social media and betting applications. Data access in this ring is especially problematic because it is contained within Big Tech corporations and betting applications.

Ring 4: Fractions of the game → This ring is destined for occasional fans that don't want to watch the whole 90 minutes of the game, their interest sparks whenever there's a goal or something more interesting during the game.

6.2 1st Idea: Partnerships

Concept

The purpose of this idea is to provide an opportunity to encourage fans to show an extra support for Portugal at some point during the game. Essentially, it consists of presenting a prize with an established partner whenever the team achieves a certain objective that is previously announced live, such as if Portugal scores an additional goal or the opponent misses a penalty. This kind of reward can be given out 24 hours after the game and it is offered not only to people inside

the stadium, but also to those in designated fan zones or events set up to promote the national team.

Segment

With this idea, fans are urged to push the team even harder to achieve that goal each time the announcement shows up, bringing them closer to the team and showing that this support can be a consistent attitude throughout the game. Given this, we decided to focus the concept to those who currently support Portugal and are used to go the stadium, which according to our segmentation relates to Patriots and All Football fans.

Partners

Partnerships with fast-food giants like McDonald's or Burger King, which create an immediate desire among fans, will produce increased involvement, as has been proved in other nations. Nevertheless, it is important to consider partners such as Continente or Galp, both of which have massive loyalty programs in Portugal. These companies have greater resources and more established relationships with individuals, as well as databases that we can utilize to gain access to a much larger audience while still providing attractive services to fans.

Real Case

For many years, the Chicago Bulls (NBA) had a deal with McDonald's in which they would offer a Big Mac to everyone in the arena if the team scored 100 points in a game. For many years, sources said that whenever the Bulls got near that mark, the crowd would erupt "into a frenzy", chanting for the team and for specific players that were in situations to score, creating an unreal atmosphere in the game. Similarly, the current partner, Portillo's, offers a free hotdog if the opposition side misses two free-throws in the fourth quarter, with the hope of putting the other team's prospects to rest before the end of the game (Chicago Tribune 2018).

Moreover, in 2004, Continente launched a campaign selling Portuguese flags for one euro. The purpose was for people to use the flag to show pride in their nation and patriotism, and nearly a million flags were sold. This example not only demonstrates the company's impact in Portugal, but also that not all awards need be food-related, there are other methods to incentivize the audience during games (Jornal de Negócios 2004).

Risks

As is natural, there are risks involved with this idea. In terms of infrastructures, some stadiums may not yet be equipped to implement such efforts, which necessitate the use of expensive and sophisticated equipment. On top of that, the Portuguese National team uses the stadiums owned by the clubs for their matches, which means that these kinds of initiatives might be complicated to implement as the team doesn't have their own venue to make their decisions. As for the awards, it may not be suitable for a sports organization to be affiliated with "junk food," let alone its offering (Medical News Today 2014). Finally, in the long run, we are attempting to attract people to football in general, and these instances may become a crutch in terms of support, which only occurs during these specific moments.

6.3 2nd Idea: Mini-Serie: “The Portuguese Journey in the USA World Cup”

Concept

Considering we have already qualified for the next European Championship; the coming year will be an ideal opportunity to start developing this concept to be carried out during the competition. The concept is a mini-series with 5/6 episodes lasting roughly 45 minutes, which will be streamed on YouTube, but we also want it to be adaptable to short form material, such as Reels and TikTok. The concept would be to highlight players' life outside of games, their whole preparation, as well as the social aspect of their day-to-day lives as a team, which may be utilized simply during major tournaments, or it could be expanded to the preparations prior

to these. There are three reasons why we feel the material will stand out from those presented earlier. To begin, we feel it is critical to demonstrate that there is no hatred between players on opposing teams, as is sometimes claimed. In addition, we aim to address a more dramatic side of the training camps, such as challenges, injuries, personal problems, and so on. Finally, some sort of crossover between other realities would be intriguing. Football players are public figures who must have friends among musicians, influencers, gamers, and others, and it would be fascinating to get them all together for a segment of the series in order to potentially draw even more people who are not used to watch football but have interest in those other realities.

Segment

In this scenario, we want to tell stories that will appeal to individuals, even if they are not football enthusiasts. With this, we want to specifically target Clubists supporters while also remembering those who are already a part of the national team and follow them every step of the way, the Patriots. The idea is to create content that shows the day-to-day, the drama, the physical and mental preparation, in order to create empathy and a sense of connection for those who do not follow the national team for whatever reason mentioned in the survey, demonstrating that it is something worth following and watching.

Real Case

In 2019, England Rugby launched a series called 'Rising Sons' which aired on Youtube throughout the Rugby World Cup. The documentary shows long-term planning, pre-match preparations and team dynamics that helped them get to within one game of glory, while also connecting us with the players and what they're going through both on and off the field, giving us a brief glimpse of what they are going through personally. The overwhelming success of this effort fueled the fans' desire for more, making room not only for a documentary during the

2023 Rugby World Cup, but also for a new series focusing the female players and their journey during the Women's World Cup (England Rugby 2020).

Risks

For this idea, the main risk is a lack of audience, without it, no project can succeed. For starters, with this type of content, people's interest may be affected by the team's performance, if they're poor, the interest could decline. Furthermore, during the pandemic, this form of material began to appear, providing people with something to watch, however, the number of documentaries has grown tremendously, posing a risk of oversaturation for fans (LA Times 2023). Nonetheless, when dealing with digital information and professional football players, there is always the necessity to preserve personal privacy and data security, which constitute an obvious risk to this idea.

6.4 3rd Idea: Kicking for a cause: A Virtual journey with our Heroes

Concept

This unique initiative focuses on bringing the players of the Portuguese national football team closer to the hearts of the Portuguese people by making a positive impact in the lives of young patients at the IPO Hospital. During the periods when the players are in training camps or preparing for their matches, we will use the power of virtual reality (VR) to virtually connect them with children undergoing treatment at the hospital.

Through virtual reality headsets, our players will engage in virtual visits to the IPO Hospital, spending quality time with the young patients. These immersive interactions will not only bring smiles to the children's faces but also show the players in a new light as compassionate heroes off the field. By extending our compassion to the children and families who need it most, we aim to unite the entire nation behind our football heroes.

Segment

The aim of this idea is to raise awareness among all segments of fans, to bring them closer to the main national team and to attract fans with less connection to our national team. Given this, we can point to Future Fans and Ronaldos as the main segments to attract and try to raise interest among the other segments.

Partners

For this idea, it's important to partner with a technology company that has Virtual Reality materials. It's also important to partner with a cause or institution that the team identifies with, and that through this initiative we can create memorable experiences for both the children and the players.

Real Case

This idea is based on the initiative created by the company Awabot, which in partnership with various sports such as Football, Formula 1, Tennis, Rugby, among others, has managed to create this link between athletes and hospitalized children through its robots, thus increasing inclusion in major sporting events by creating unforgettable experiences (Awabot, 2023).

Risks

As an initiative created through virtual reality for interaction with children, some problems could arise related to privacy and security, and it is crucial to guarantee respect for privacy between players and patients. Other risks could be related to the reactions of the public and the media. Although the majority are positive and support this type of cause, there may be negative reactions related to the motives behind the initiative, so it is very important to carry out this campaign with total transparency and clear communication to avoid these problems.

6.5 Risks of Digital Innovation

Although there is still some resistance to accepting digital innovation in sports, particularly among older generations as was presented previously in this project, there is no denying that they are an important part of the industry's future and will provide significant benefits to football and sports in general. However, when it comes to digital engagement, this industry is hesitant to address the dangers that come with these new developments, simply because they do not want to assume that there would be problems. With that in mind, we feel there are risks involved with this new period, which we will discuss.

Technological Dependency

For fans, there is a risk of over-reliance on technology. The increasing use of technology may lead to a variety of circumstances that may diminish the fundamental meaning of the sport by decreasing interest in games that have not been enhanced by technology or by diverting viewers from the true spectacle taking place on the field. Furthermore, the overall well-being of fans associated with an easy getaway from digital routines is jeopardized by this technological overload.

Fan Alienation

Acceptance of the use of technology in sports is not unanimous. Older fans still feel alienated in this sense, which poses a problem given that, considering the traits of the younger generations, they are the most loyal followers. These fans are still interested in traditional football methods and authenticity. Moreover, some followers are concerned about losing what is pure and has characterized sports for decades, hence they oppose such changes that they believe would undermine football as a sport (Dr. Sascha L. Schmidt 2018).

Cost and Resource Constraints

In general, there will be teams who are going to allocate a lot of money to these developments, leaving others behind who do not have the same resources. For example, in 2022, Barcelona and Real Madrid were the two most innovative sports teams in the world. Given this, other clubs in the Spanish league will be at a disadvantage, limiting the possibility of fair competition (Sports Innovation Lab 2022). However, the risk for fans may be even deeper. As games become more appealing, teams might be compelled to spend more money, raising expenses for spectators and, therefore, resulting in a loss of buying power, which may lead to supporters attending fewer games at the stadium. Since the ultimate objective is to establish a system that attracts followers, it is imperative to proceed with precaution on this matter (Miranda Green 2017).

Data Security and Privacy

Data breaches are one of the most important issues regarding the privacy and security of sports data, both athletes' and fans' data. They can be caused by poor cloud management, unauthorized access and insecure data that often go unnoticed due to a lack of visibility, creating data compliance and privacy challenges. Notably, these concerns were highlighted in a study conducted by Craig Lurey, the Chief Technology Officer, and co-founder at Keeper Security. Lurey's insights underscore the critical nature of addressing vulnerabilities to safeguard against potential data breaches.

On the cyber front, as far as cyber risks are concerned, the sophistication of threats will increase through the generation of malicious code, reverse engineering of security offers and complex phishing, which could result in losses in ticket sales, decreased security of sporting events and a negative impact on the image of brands (clubs, event organizers, events).

7. Case Study 2026 World Cup

7.1 Initiative for 2026 World Cup

In this section, towards a more complete work project, we want it to be based on everything gathered throughout the project, with academic and business sources as well as insightful conclusions obtained from many discussions with people specialized in this area and combining all this information into a practical and possibly future strategy. With that basis in mind, we decided to carry out a Case Study that might have real applications in a near future, in collaboration with the Portuguese Football Association, concerning the 2026 World Cup in the United States and how the Portuguese communities within and worldwide will be able to enjoy the event as Portugal fans, which will also include a business case to better understand the steps required to put this into action. There are currently around 1.3 million Portuguese immigrants or descendants residing in the United States, which we feel have been overlooked in terms of fan involvement for many years, illustrating the inadequate service offered to the Portuguese diaspora globally (FLAD 2023). For a bigger impact in the future, a compromise with the communities must be reached by presenting more in-person events, creating a more personalized loyalty program, and applying digital experiences to bring all fans together. As previously mentioned, the USA is the most advanced country in terms of digital fan engagement tools, with technical breakthroughs arriving on the market on a regular basis, which means that this event offers an enormous opportunity for the Portuguese Association to distinguish themselves and to build a connection with the fans.

Portuguese Communities

There are four major areas in the country where the Portuguese diaspora is more popular: Boston, Newark, Rhode Island, and California. These locations host the older, more cohesive,

and traditional clubs, where some of them, although used for local community gatherings, maintain a strong feeling of identity with their country. Furthermore, it also has been observed that there is an increasing number of people in the Portuguese communities of New York, Texas, Georgia, Florida, or Pennsylvania (FLAD 2023). While the main ones may attract a larger number of individuals, there are also games during the World Cup in each growing state, which represents a great opportunity to implement our concept.

We were able to examine the social and economic status of the Portuguese communities in the United States using research supplied by the 'Fundação Luso-Americana para o Desenvolvimento' (FLAD), which differs between Portuguese descendants and emigrants. While both groups earn a higher average income compared to the rest of the country's residents, it's clear that the Portuguese descendants, who make up a much larger population, are pushing this average up since the majority of them work in consulting, scientific, and technical activities, whereas a large share of the emigrants, an increasingly aging group, work in less qualified jobs, such as construction (FLAD 2023). As the Portuguese are assimilated into an American society, there is also the prospect that the range of individuals we can reach expands significantly since they may bring with them all those who do not share their origins but are essential in their lives and want to enjoy those moments with them.

Concept

The basic concept is to have a contest between the Portuguese associations in each of the cities and surrounding areas that will host World Cup games. During the main event, the top places would be chosen as bases for the unique Portuguese initiatives and Fan Zones. The fundamental goal behind this project is to introduce the Portuguese identity to individuals who do not experience it on a regular basis and may desire to remember or nurture their connection with

the nation. That way, they may spend a day just like they would in Portugal, with their community, their costumes, and closely enjoying their home nation throughout this important competition.

Selection, Criteria and Prizes

Prior to the World Cup, the best houses that will represent Portugal will be chosen based on criteria such as the number of games in the city, the number of people in the community, the quality of the infrastructures, or the deals made with local tech companies. Finally, the goal will be to set up multiple places, perfectly located in each community, that will serve as a link between the national team and Portuguese fans.

Regarding prizes, each game would represent a separate contest, with the best event, based on factors such as merchandise sales, number of people, or level of engagement, able to give away tickets to their community for the next game or have access to some unique features for the following match, provided by the Portuguese Association.

Ways to Promote this Initiative

In order to promote and gather as many fans as possible for this initiative, we believe it will be necessary to create some kind of exclusive content, so that every fan present has a high-quality experience. To create exclusive content, we thought of three different ideas:

The first idea would be to have legends from the world of Portuguese football, whether male, female or esports (Paulo Futre, Luis Figo, Jéssica Silva, etc.) as ambassadors for these events.

These ambassadors would have to be present at the events and one of the many possible ideas would be to have them provide live commentary at each half-time break. Secondly, we think it would be interesting to also have some Portuguese influencers or YouTubers as the main promoters of this initiative, thus captivating some of the younger generations.

Finally, we believe that creating exclusive content with some technological innovations, such as Augmented Reality or Virtual Reality, could be a great way of promoting these events, attracting a large number of fans and undoubtedly an excellent way of providing them with unique and unforgettable moments. Ideas such as having exclusive access to real-time images of the players' match-day routines, such as the walk the players take on the morning of the game, or images of the bus on the way to the match, via virtual reality devices could be a great catalyst for improving the experience of the fans who attend these events. In summary, through these ideas, we believe we can captivate fans of all generations and provide them with great moments around the national team.

Goals of the Fan Zones

This initiative has the objective of fostering the union and mobilization of the Portuguese diaspora throughout the competition and onwards as well as those who have a special connection with the country, because of friends, family or any other reason. We want to be able to bring together people with different backgrounds but that share a common goal, their love for Portugal, which will introduce our country's identity to those who don't experience it regularly.

Furthermore, there are multiple other objectives that we intend to achieve with it. It's important to promote the reintegration of a loyalty program with the diaspora, since it has been under looked in past years, showing their commitment to these communities. On the other hand, the initiative aims to increase event revenue through promoting merchandise sales.

Finally, the ultimate objective is to promote a customized and improved experience to each fan, allowing them to spend a day with the team, as if they were part of it, accompanying them every step of the way.

Main Risks of the Events

We know that there are several risks associated with this initiative. First of all, we know that the team is not yet qualified, and there is always the risk that it won't be. Then there are risks associated with external factors, such as the weather or community support, which can affect the quality of the fan experience.

As this is a large-scale event and organization, we also know that there are various restrictions on what federations can share or promote during the event, and there may be various legal restrictions. On top of that, the United States technological market may be difficult to tap into by Portuguese companies, as it may already be over saturated by local companies.

Finally, we also look at the risks associated with logistical challenges. The coordination of these events over several days in different cities can present some challenges related to transportation, accommodation, budget restrictions, coordination with local authorities and, as an event that incorporates some technological innovations, it is also necessary to take these challenges into account, including technical failures and compatibility problems. The implementation of the fan engagement strategy for the 2026 World Cup requires a multifaceted approach, combining the mobilization of local communities, technological innovation and strategic partnerships.

7.2 Costs and Investment

In managing projects, including our own, the goal is to minimize costs and maximize revenues. This section focuses on analyzing project-related costs with the aim of innovatively reducing them while strategically increasing revenues. The objective is to position the FPF as a leader in a challenging and highly digital future, attracting and valuing every fan.

A significant portion of the costs is allocated to promoting the digital fan zone. To reach the target audience of mainly emigrants and American fans, diverse strategies will be employed, leveraging national and international influencers on platforms like Instagram and TikTok.

Utilizing Portuguese human capital, including renowned players like Luis Figo and Paulo Futre, as well as local Portuguese houses, will enhance the initiative's promotion in American society. This approach caters to both the younger generation, sensitive to digital advertising, and older fans drawn to the allure of legendary players. Key costs in this category involve transportation, including flights, hotels, and food, along with compensation for the personalities involved.

The project's core, a digital fan zone offering personalized and exclusive content, can partner with top Portuguese companies specializing in virtual reality. This mutually beneficial collaboration grants these companies exposure in the global digital economy, access to American investors, and the opportunity to showcase their expertise at major events like the World Cup. Simultaneously, the FPF benefits from reduced costs for virtual and augmented reality aspects. While alternative options involve utilizing American companies for potential cost savings, this may compromise the national team's role as an ambassador for the Portuguese economy.

Addressing space costs, leveraging the significant Portuguese community in the US becomes pivotal. By utilizing local houses as spaces for the fan zone, the FPF fosters a closer connection with emigrants, offering them proximity to their national team and country. This approach is cost-effective for the FPF and creates a mutually beneficial situation, potentially gaining new fans, Portuguese or otherwise.

7.3 Preparation and Implementation Timeline

The planning for this initiative should begin well in advance, before the World Cup begins. This preparatory period will allow a proper structuring of activities, establishment of partnerships, and planning of a schedule for implementation and execution. The fan zones in

the United States should be prepared a few months before the tournament starts to ensure that everything is operational on time.

The contests among the Portuguese associations or houses in cities hosting World Cup games should be initiated either before or during the tournament. If the goal is to select the best bases for the World Cup, the contests should start early. On the other hand, if the goal is to choose the best organization based on dynamic engagement during the games, contests could occur during the World Cup. The criteria for the best organization can be based on the sales of merchandising, the number of people engaged, or sponsorships acquired.

7.4 Partnerships and Collaborations

Tech Partnerships

Partnering with tech companies may represent a huge opportunity for the FPF but also for medium and small sized companies in the United States. Since the bigger firms will probably close major deals with the organization of the World Cup, it leaves no space for these other companies to participate in the competition besides partnering with the teams, which means that they might even consider paying a fee to have their technology presented in our Fan Zones, with global visibility during the tournament. Moreover, it also may be a chance to penetrate the Portuguese diaspora working in these industries. This can lead to innovative ideas for fan engagement and content creation for the Portuguese national team during the World Cup. These partnerships can extend to the numerous start-ups growing in Portugal, leveraging the United States as a major investment hub for these Portuguese start-ups. The Portuguese Football Federation (FPF) could also align specific areas of interest and create contests to bring these start-ups together, increasing the implementation of their ideas in the U.S.

Potential Partnerships

Buzzer is a tech startup based in the United States, specialized in delivering real-time sporting moments to sports fans through its app. Users can follow their favorite sports, players, and teams and receive instant notifications about live events. This could align perfectly with the FPF's goal of enhancing fan engagement during the World Cup. A partnership with Buzzer could involve tailored fan engagement experiences, real-time alerts and highlights of the Portuguese national team matches, and maybe exclusive content, enriching the overall fan experience.

Armis Digital Sports, a tech company based in Portugal, envisions the future of sports technology. With experience in developing innovative technological solutions, they specialize in software management for sports organizations and fan-centric portals. Collaborating with Armis Digital Sports could lead to the creation of a fan-centric portal or a dedicated mobile app for Portuguese football fans. This platform would offer real-time updates, exclusive content, and interactive features. By leveraging the expertise and innovation of these tech companies, the FPF could redefine fan engagement, making it more interactive and enjoyable for fans in Portugal and worldwide.

Influencers and Micro-Influencers

The use of influencers, including micro-influencers, can be a powerful tool. Engaging both with people living in Portugal or Portuguese people living abroad to create content about the national team can generate a diverse range of stories. These narratives could range, for example, from a fan in Spain watching the games on television to another in the U.S. following the players during the World Cup. This strategy would create a rich diversity of content, reflecting the varied experiences of individuals wherever they are watching the games.

7.5 How do we bring the fans to the games?

Within the USA

The United States is a massive country so, naturally, it will not be easy to move from one city to another to watch the games, without even considering the costs that come with it, which led us to question ourselves, for example, how do we get people from the community in Newark to go to a game in Texas, on the other side of the country. As seen previously, the economic situation of the communities in general and them crave to experience even a little piece of the Portuguese identity opens the door for this to be possible which leaves us to find the right solutions to make it happen.

We believe that there are a couple of initiatives that can facilitate this problem. Firstly, within the Fan Zones, it's important to organize activities, such as contests or football tournaments, that eventually will offer game tickets for the winners and, eventually, will incentivize friends or family members to join the winning person on the trip for the game. In terms of transportation, we believe that the creation of fan buses, customized and created specifically for Portuguese fans, will not only provide the transport from the communities to the stadiums across the country but also represent an incredible and unique journey as a fan during the World Cup. Finally, the attention and care given by the FPR and the actual players on the squad to these associations will be vital to boost interest and excitement around the communities.

From Portugal

For a genuine World Cup experience, adding to the diaspora already placed in the country, it's vital to be able to engage and move fans from Portugal. However, the costs that come with it are even greater than for those who live in the US which makes it difficult for the fans to afford. For example, just for a simple notion of the costs, as a benchmark, we discovered that an NFL ticket in Miami costs no less than 400 dollars, adding to travelling costs as well as living costs

that are much higher than in Portugal. So, in a period where the prices will rise intensively due to the World Cup, and the ticket prices will probably be close to what is presented in the NFL, the costs will certainly be a constraint when considering the journey.

As presented for the fans in the United States, the creation of contests and campaigns for the opportunity to win tickets for the game will, once again, motivate those around the winner to purchase tickets as well. Furthermore, the creation of special fan pack for this event (plane tickets, accommodation, tickets for games and events, etc.) can provide affordable and convenient options for people and can be achieved by deals with airlines, travel agencies or places for accommodation in the US. The promotion of these initiatives will be proved vital for its success, showing the benefits of the packs, the fans zones assembled with the communities and all its activities as well as the experiences achieved in a journey to the United States.

Ultimately, we feel that this experience won't be possible unless the fans have a story to tell by the end of it, which means that it's up to us to show the value of their investment and motivate them to make that choice. This may be achieved by a daily follow-up on what the national team is going through or the preparations that are being made for this event, which will tell a story from our point of view to the fans, enticing them to create their own with us in the World Cup.

7.6 Conclusion

Concluding this case study, it's critical to remember that it won't be easy to move fans into the stadiums, because unlike what happens in Europe, the United States is a much bigger and distant country. However, this World Cup has something that sets it apart from the previous two, we have the advantage of having the additional strength of the Portuguese diaspora that still has a great emotional attachment with our country, so this represents a priceless and once-in-a-lifetime opportunity to watch Portugal play a World Cup in home country. Furthermore, as previously approached, this competition will be a great benchmark for Portugal as one of the

organizers of the 2030 World Cup, as this country has all the innovation, dynamics and capacity to organize an event like this.

Finally, we believe that this whole initiative will bring out everything good that Portugal and its national team has to offer, in the best and most watched sports event in the world. If everything goes to plan, we will be able to gather communities and show our identity for one main goal, Portugal.

8. Conclusion and Recommendations

The sport industry has been facing structural challenges, the younger generation are no longer available to spend 2 hours seeing a game because with the internet and the increasing digitalization, they have an easy access to a lot of diverse content from different parts of the world, meaning that they have other and less time-consuming forms of entertainment. Therefore, there is age gap where the younger generation have different interests than the older generation and, for that reason, new ways of engaging this new generation, that sooner will replace the existing one, is essential to ensure the industry's survival.

These problems with the level of fandom and how to engage the new generation of fans open the discussion to the question that defines our project: "The future of fan experience: How will Digital Improve the Fan Experience? Will it bring risks to enjoy the match itself?".

Firstly, based in the existing literature, we looked to the most advanced market in terms of Digitalization and Fan engagement, the United States of America. The sports industry's economy, the younger generation of American fans and the main trends in terms of fan engagement and digitalization within and outside the stadium were studied to increase the deepness of the analysis. The main goal with the research is to understand what has been done in the US and try to replicate it in other geographies.

Then, we investigated new technologies, liked virtual and augmented reality, in order to understand what is being created in every corner of the world, that may be applicable in the sporting world and, eventually, help fighting fans' disinterest. However, an unprecedented event took the industry for areas never explore before, the Covid-19 pandemic. Governments were required to take measures and people were forced to stay at home, while leagues had to be interrupted. Faced with these deadly challenges, where ticket revenues were reduced to zero and all the problems with the fan engagement were aggravated, the industry was forced to use all the existent technologies, along with new ones to keep the fans engaged. Hence, it is important to understand what happened during the pandemic, since this deadly threat forced the industry to adapt and to be more prepared for the future where the fans' needs will change dramatically.

Nonetheless, the existent literature also tells that exclusive content is what the fans are looking for and, for that reason, the European and Portuguese market were segmented to find what attracts different types of fans. After a cautious analysis, women and younger generations were the two types of fans that we focused on mostly due their significance, with the first being the most unexplored segment while the second represents the future fans. With this methodology, we were able to show how clubs, leagues and the FPF, which is our partner, may be better prepared for the future and how they can increase their fandom levels and, consequently, increase revenues and keep the industry as one of the most profitable in the world. Additionally, the Esports market is emerging in the horizon, providing an opportunity for the FPF to use it as a way to increase the revenues and the levels of fandom.

In order to put into practice everything previously mentioned, and in collaboration with the FPF, an initiative was built for the 2026 World Cup. A partnership between FPF and the Portuguese Associations in the US was suggested, with the idea to create digital fan zone where

everyone in the United States with a physical or emotional relation with our country can have access to exclusive content, and where they can feel a little bit closer to a place where they once called home. The digital initiatives were thought to correspond to the increasing necessities of the younger generation while, at the same time, watching the game with a wider community increases the sense of belonging for everyone involved.

Finally, despite all the learnings throughout this work project, our recommendation for the FPF, alongside with the clubs and sports organizations, lies on the effort that must be made in the collection of fan's data, despite the importance of the application of new technologies in the stadium or in terms of broadcast, that will allow them to offer exclusive content that meets the fans' needs and will increase the levels of fandom while, ultimately, answering to the research the question: ““The future of fan experience: How will Digital Improve the Fan Experience? Will it bring risks to enjoy the match itself?””.

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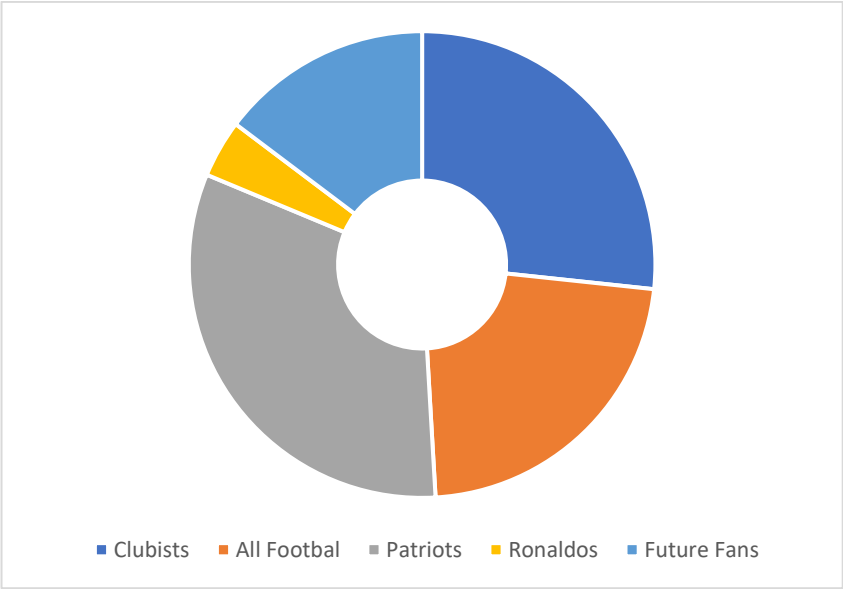
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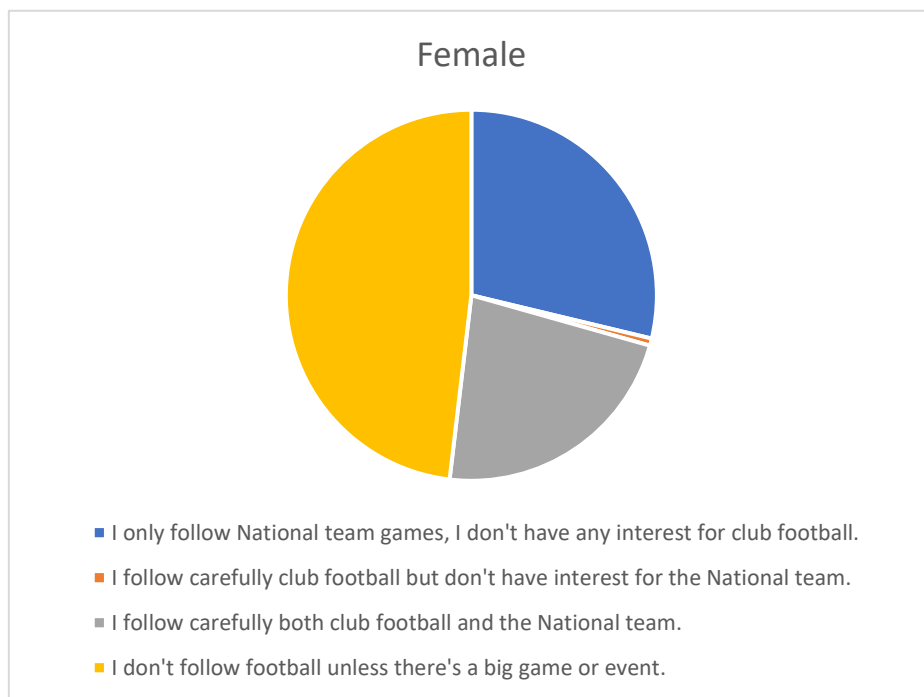
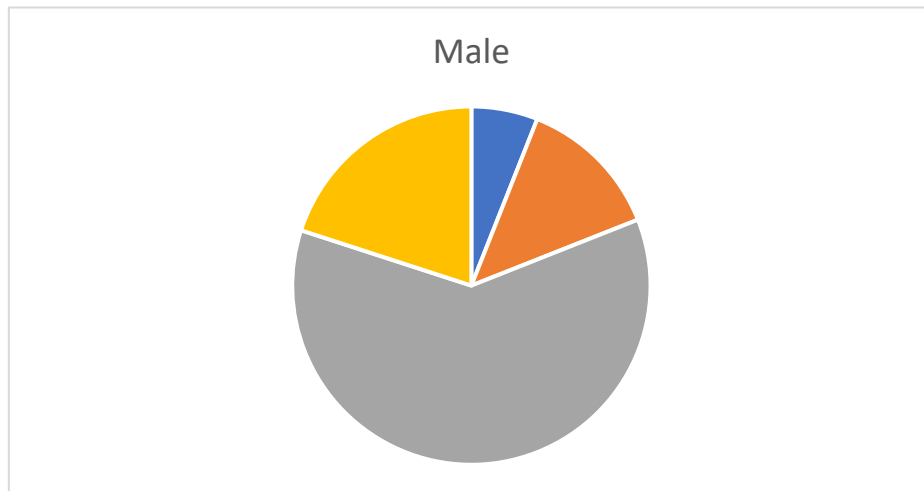
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10. Appendix

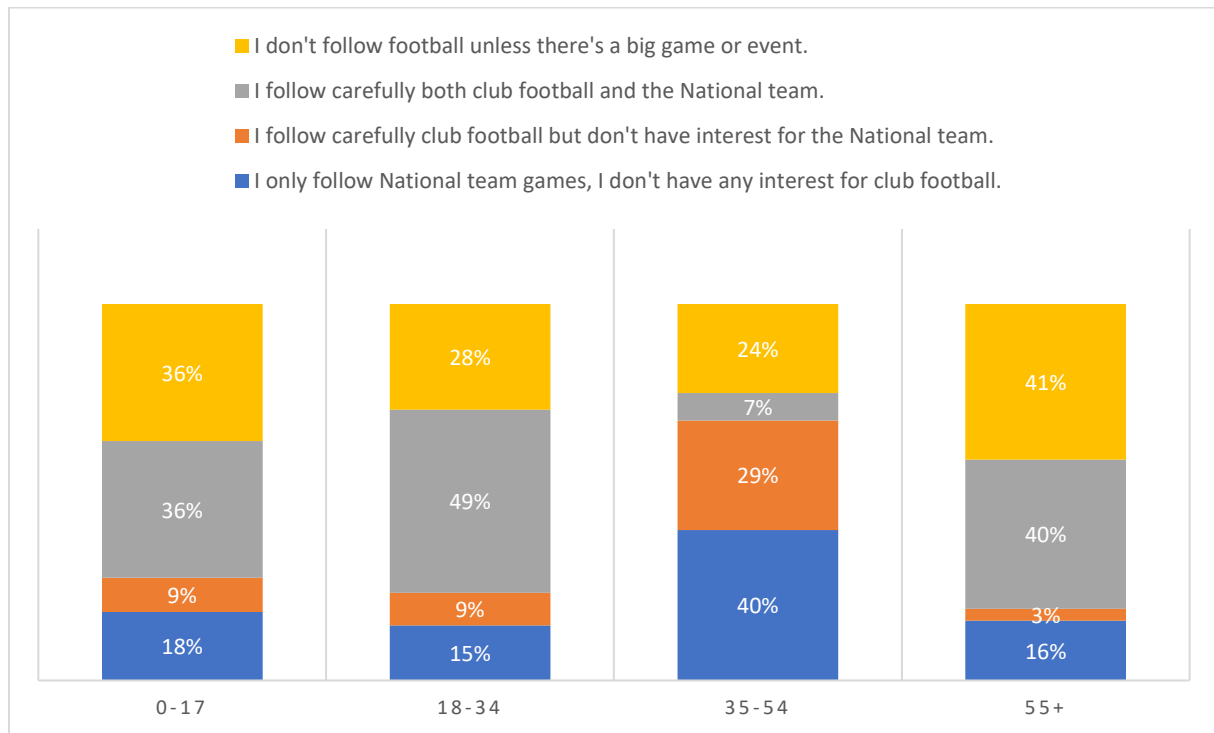
Appendix 1- Type of fans



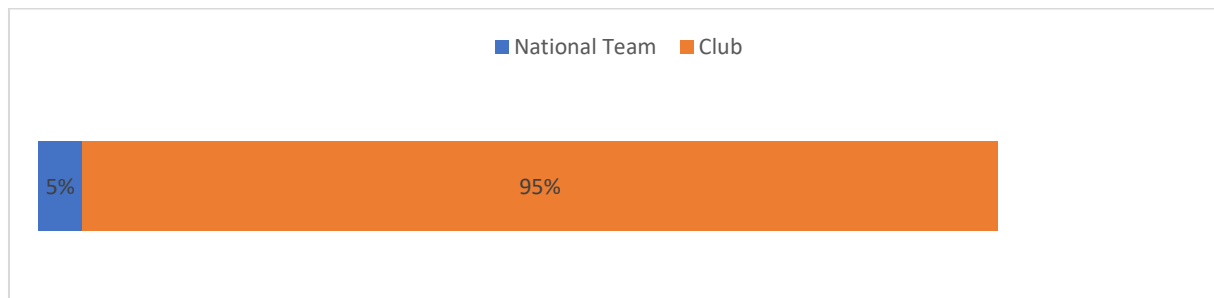
Appendix 2- Why do people follow football by gender?



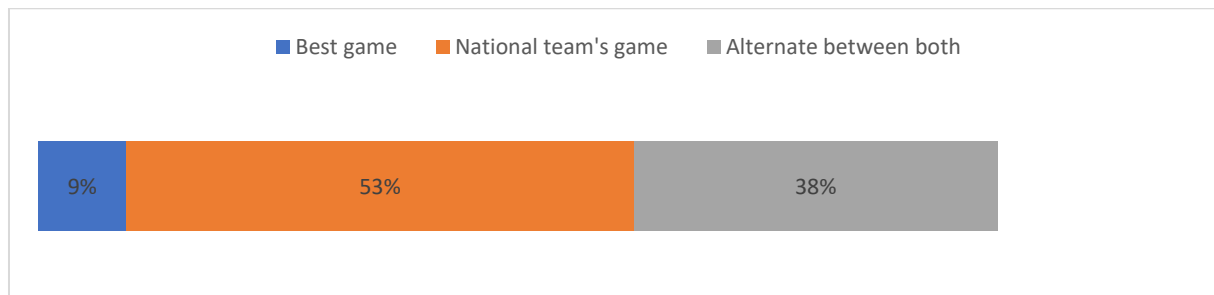
Appendix 3 – Why do people follow football by age?



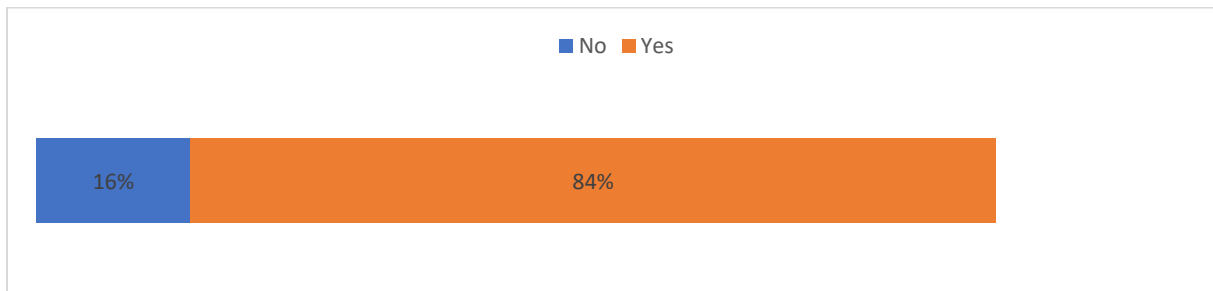
Appendix 4 – Do the “Clubists” prefer the National team or Club Football?



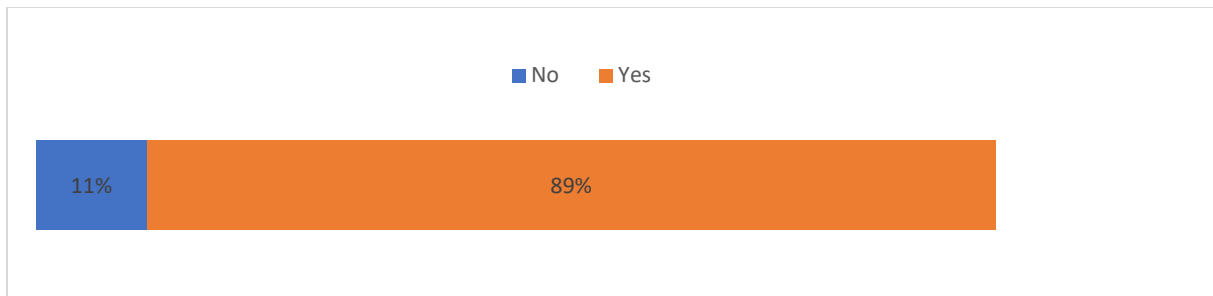
Appendix 5 – What game do the “Clubists” prefer to watch?



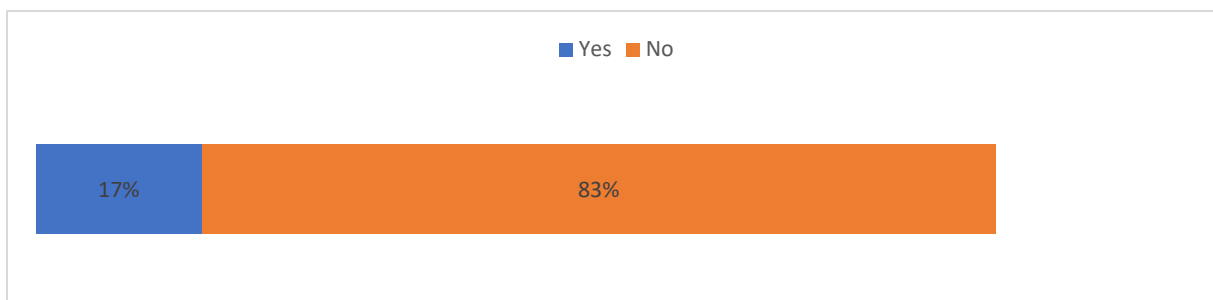
Appendix 6 – Is the social side of the game important for the “Clubists”?



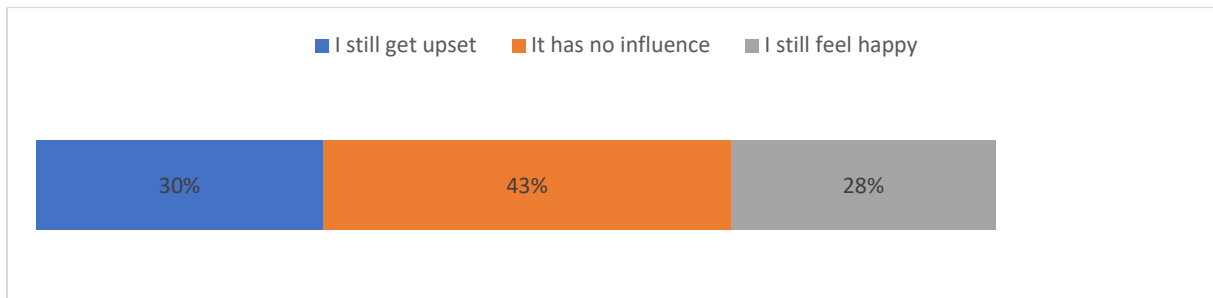
Appendix 7 - Do the “Clubists” prefer to watch the national team play against a better team even if that means that they have a lower chance of winning?



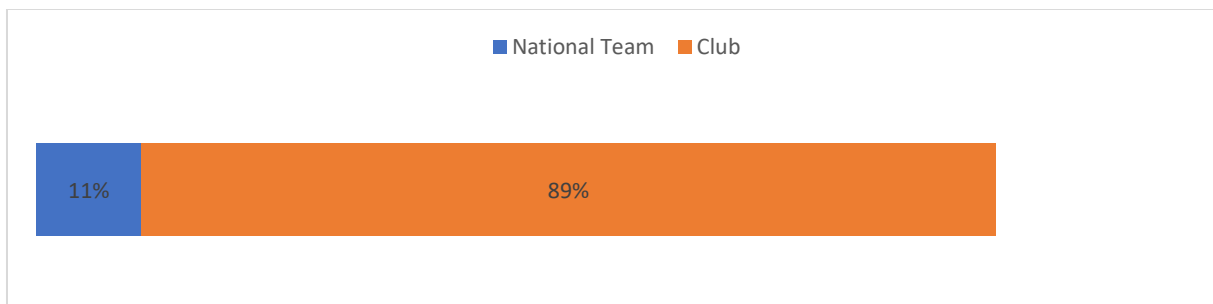
Appendix 8 – If Cristiano Ronaldo leaves the National team, does the “Clubists” interest drop significantly?



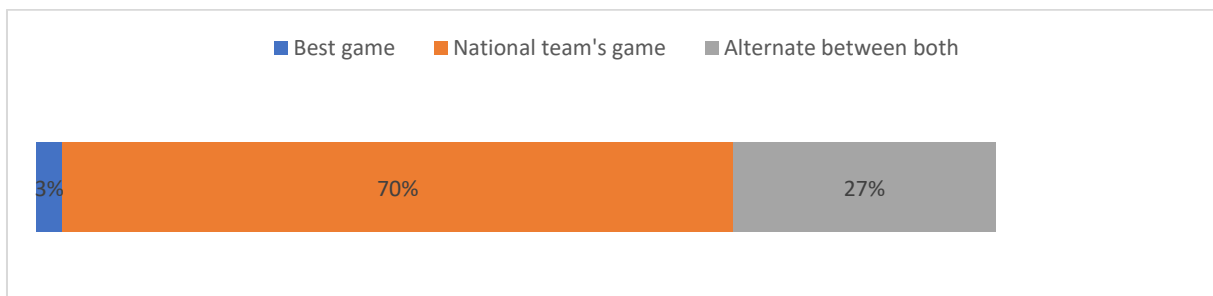
Appendix 9 – How do the “Clubists” feel if their favorite player scores but the national team loses?



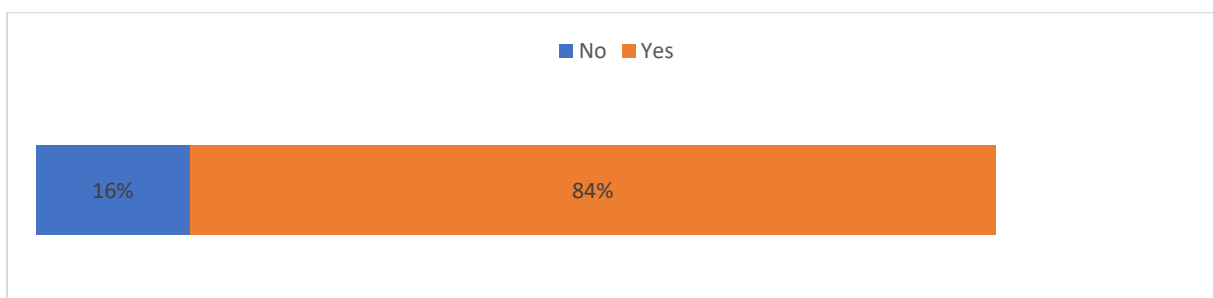
Appendix 10 – Do the “All Football” prefer the National team or Club Football?



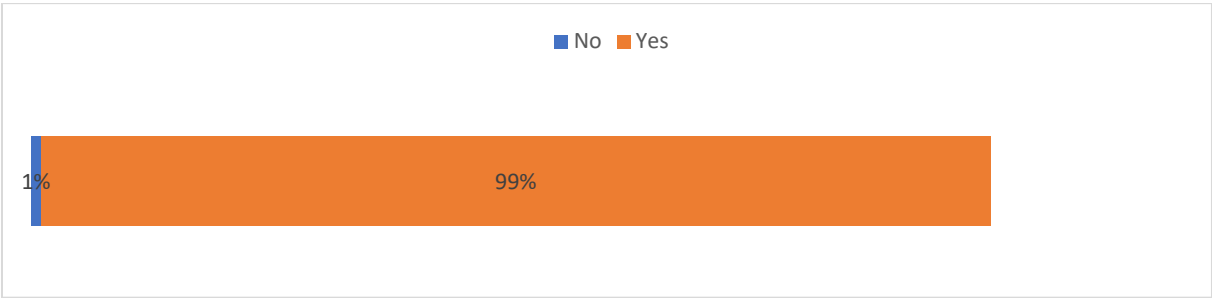
Appendix 11 – What game do the “All Football” prefer to watch?



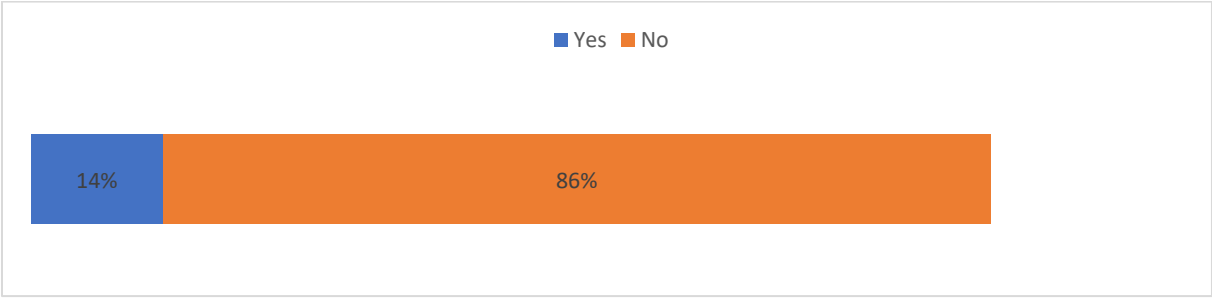
Appendix 12 – Is the social side of the game important for the “All Football”?



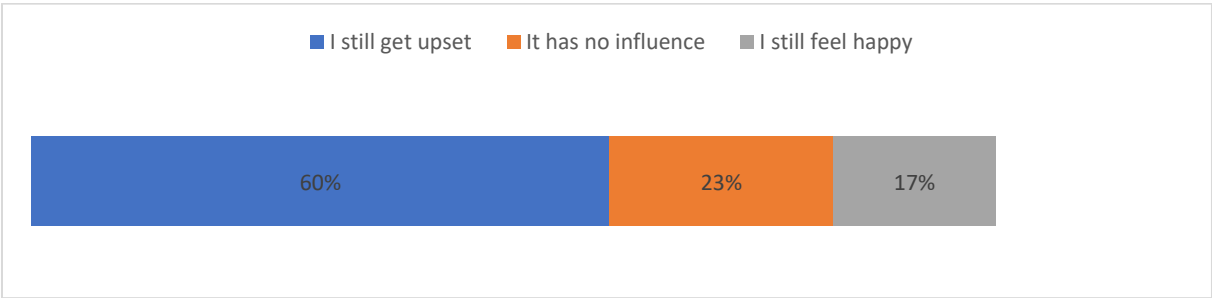
Appendix 13 – Do the “All Football” prefer to watch the national team play against a better team even if that means that they have a lower chance of winning?



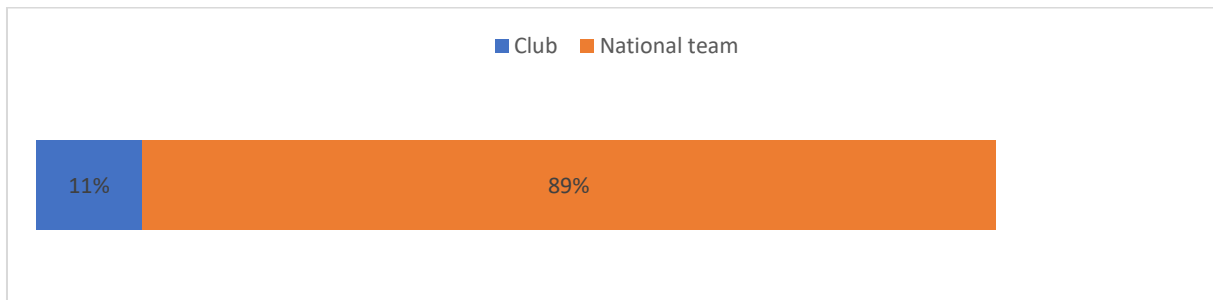
Appendix 14 – If Cristiano Ronaldo leaves the National team, does the “All Football” interest drop significantly?



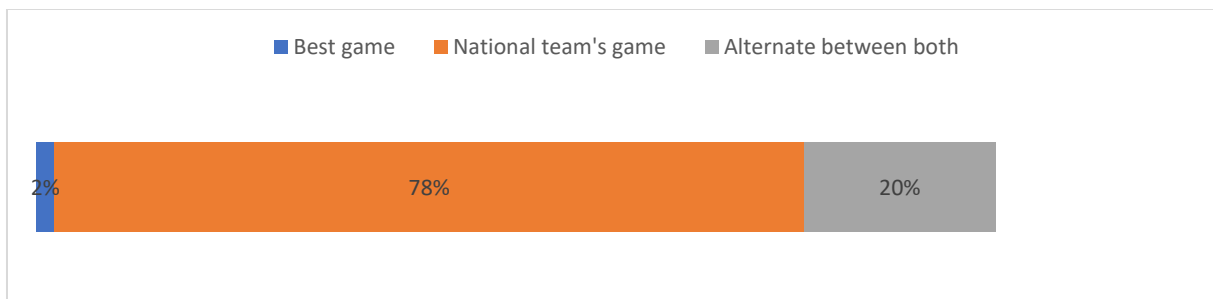
Appendix 15 – How do the “All Football” feel if their favorite player scores but the national team loses?



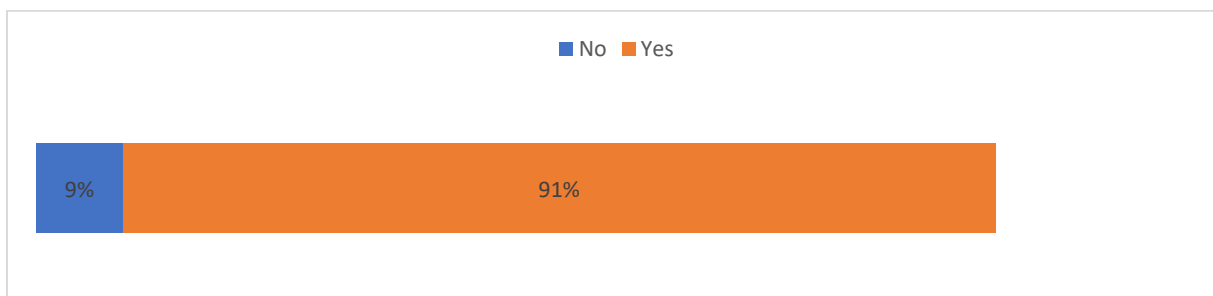
Appendix 16 – Do the “Patriots” prefer the National team or Club Football?



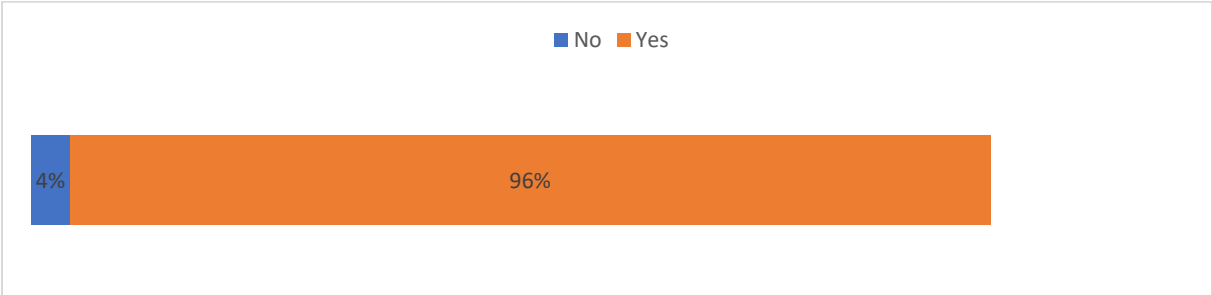
Appendix 17 – What game do the “Patriots” prefer to watch?



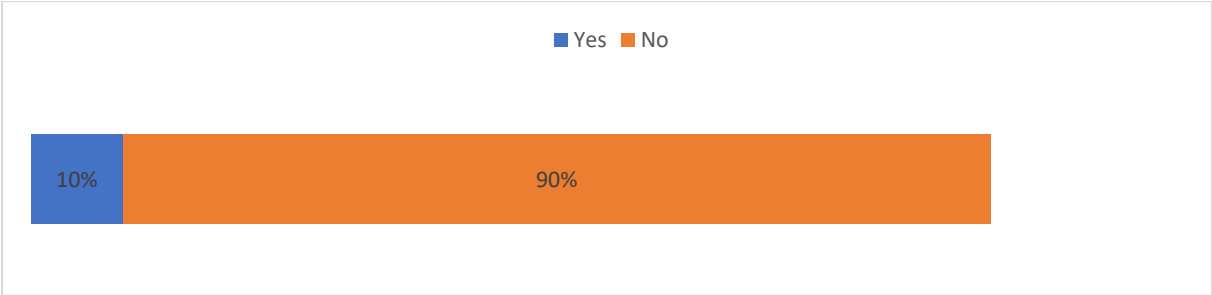
Appendix 18 – Is the social side of the game important for the “Patriots”?



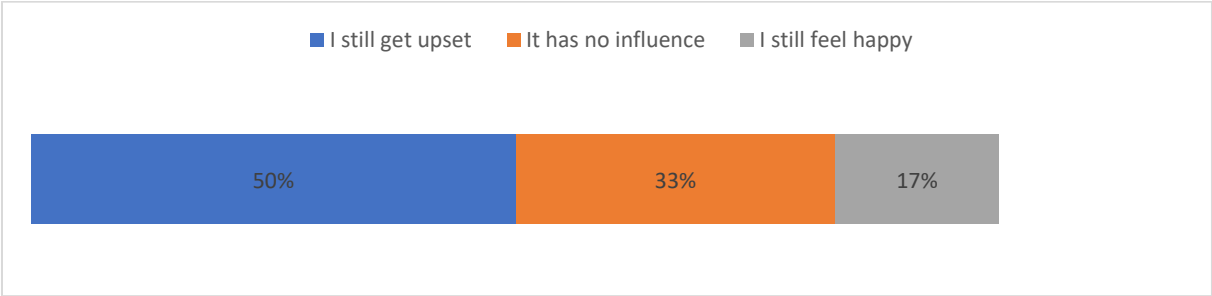
Appendix 19 – Do the “Patriots” prefer to watch the national team play against a better team even if that means that they have a lower chance of winning?



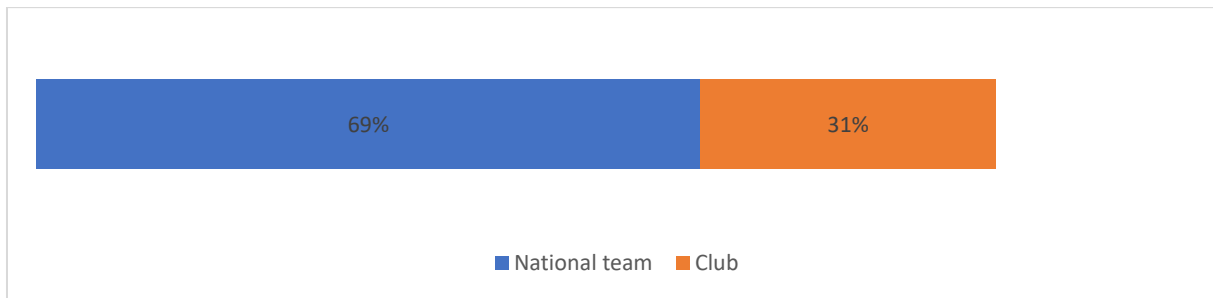
Appendix 20 – If Cristiano Ronaldo leaves the National team, does the “Patriots” interest drop significantly?



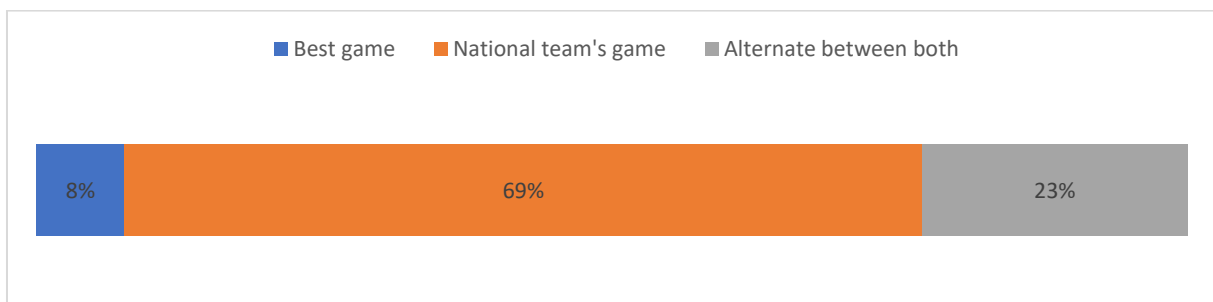
Appendix 21 – do the “Patriots” feel if their favorite player scores but the national team loses?



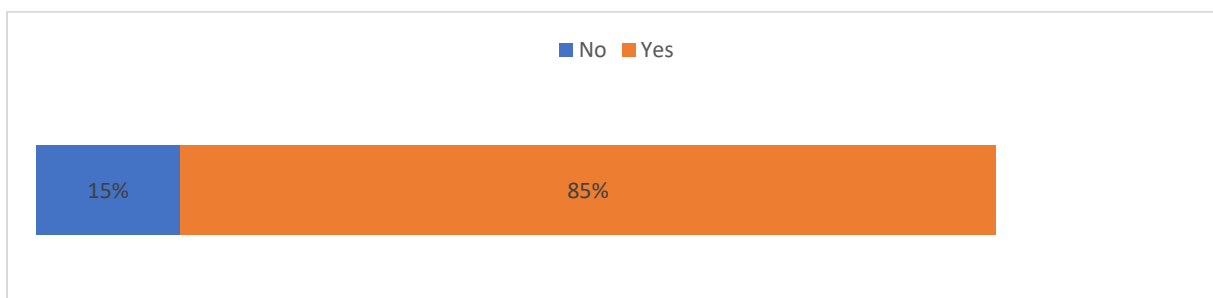
Appendix 22 – Do the “Ronaldos” prefer the National team or Club Football?



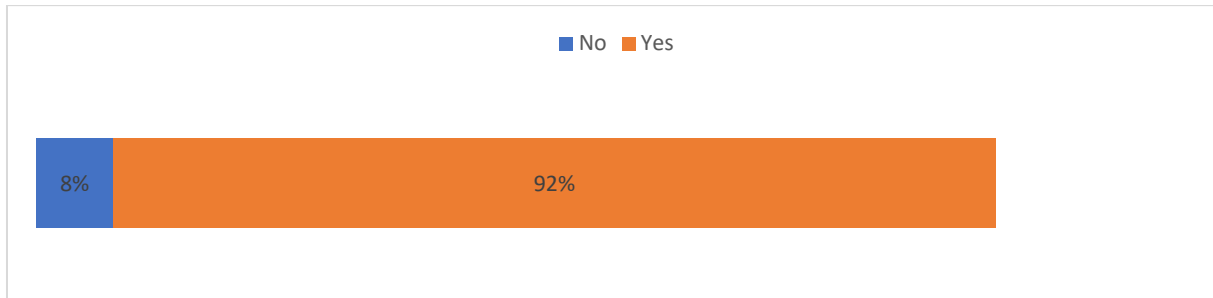
Appendix 23 – What game do the “Ronaldos” prefer to watch?



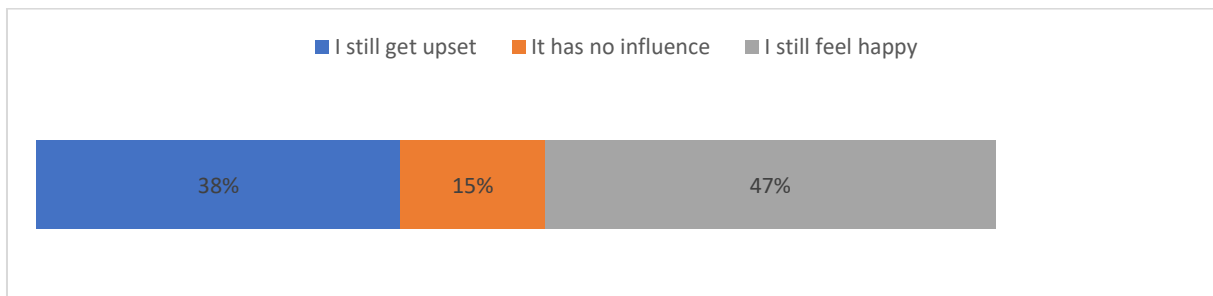
Appendix 24 – Is the social side of the game important for the “Ronaldos”?



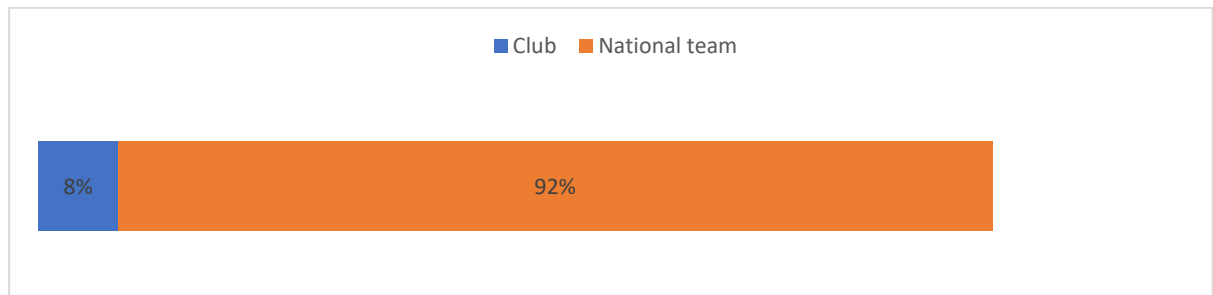
Appendix 25 – Do the “Ronaldos” prefer to watch the national team play against a better team even if that means that they have a lower chance of winning?



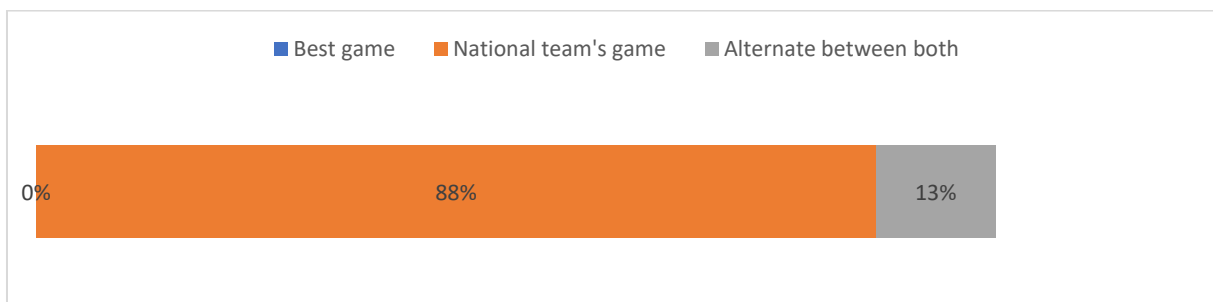
Appendix 26 – How do the “Ronaldos” feel if their favorite player scores but the national team loses?



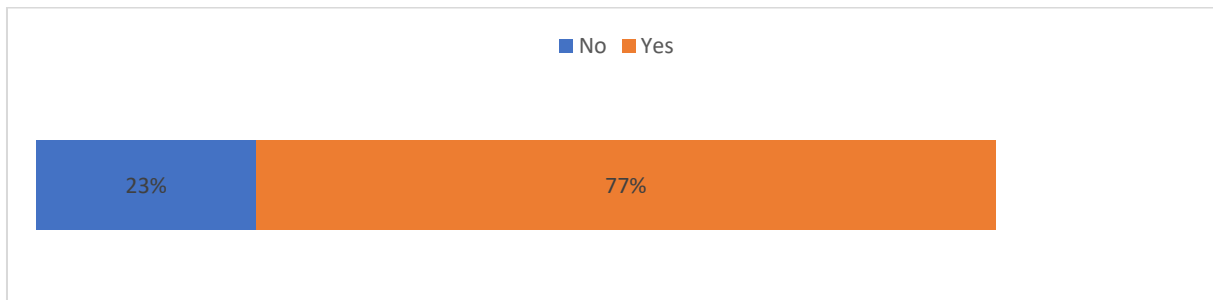
Appendix 27 – Do the “Future Fans” prefer the National team or Club Football?



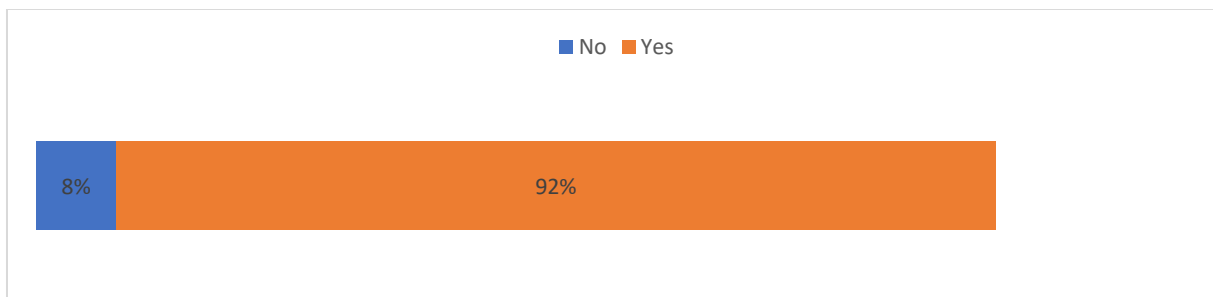
Appendix 28 – What game do the “Future Fans” prefer to watch



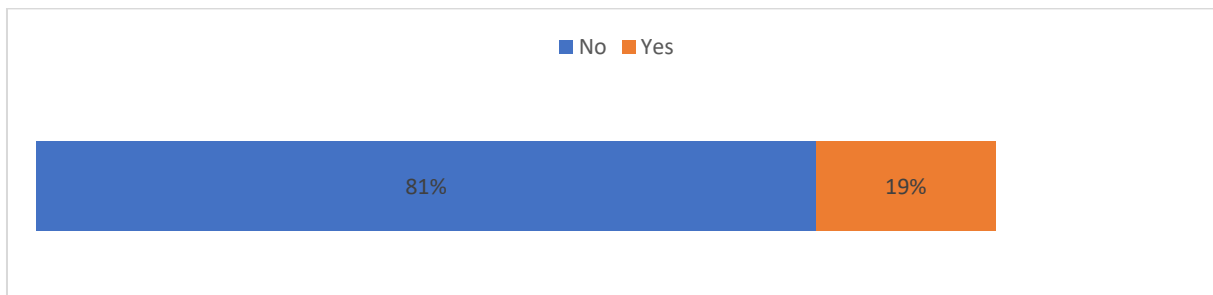
Appendix 29 – Is the social side of the game important for the “Future Fans”?



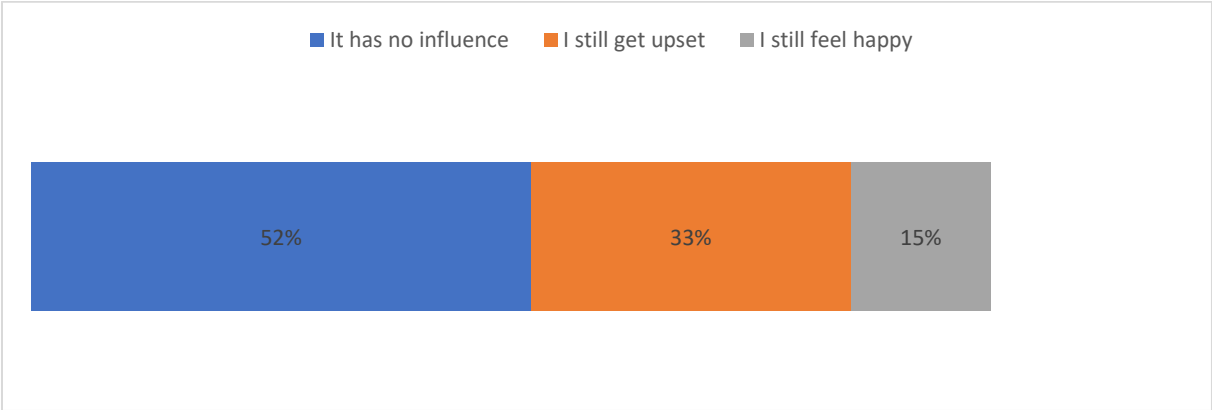
Appendix 30 – Do the “Future Fans” prefer to watch the national team play against a better team even if that means that they have a lower chance of winning?



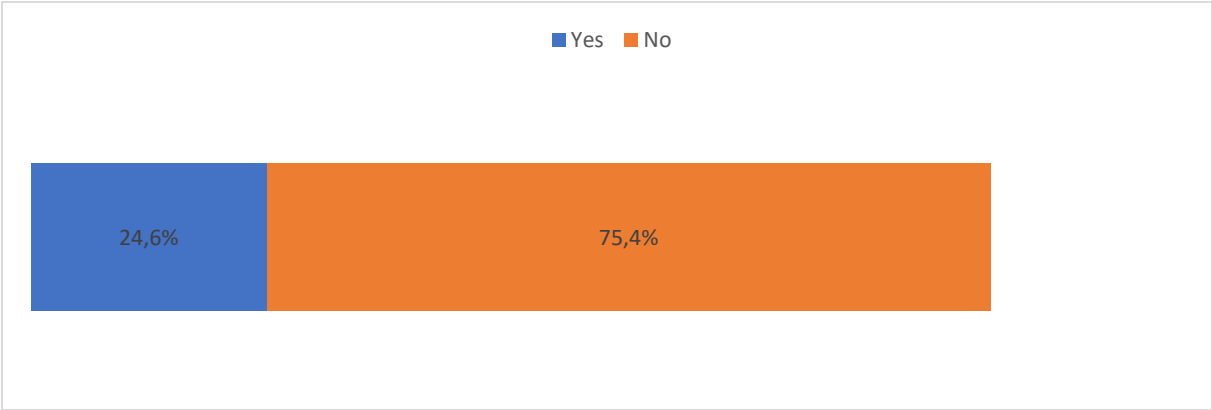
Appendix 31 – If Cristiano Ronaldo leaves the National team, does the “Future Fans” interest drop significantly?



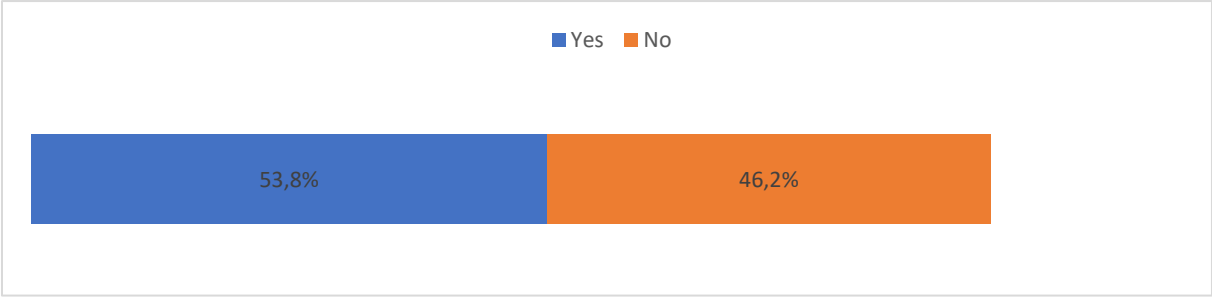
Appendix 32 – How do the “Future Fans” feel if their favorite player scores but the national team loses?



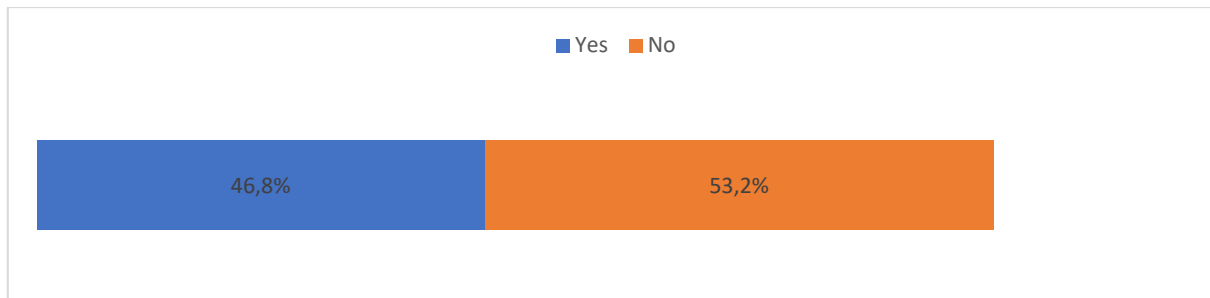
Appendix 33 – Do people prefer to watch the highlights instead of the full game?



Appendix 34 – Do behind-the-scenes content from the national team strengthens people’s connection to the team and encourages them to watch more games?



Appendix 35 – Do people find that interactive opportunities during matches are important?



Appendix 36 – Is the digital content a determining factor in their engagement with football?

