

## **69% of fans prefer to watch sports outside the venue, especially younger generations**

*Technology innovation is rapidly improving the at-home viewing experience for sports fans, but the venue experience is yet to catch-up.*

**Paris, June 6, 2023 – The technological advances of the last three years have dramatically improved the experience for sports fans at home but have been less impactful for those visiting the grounds. That’s according to [Capgemini](#) Research Institute’s latest report ‘[A whole new ball game: Why sports tech is a game changer](#)’. In fact, as technology continues to enhance the viewing experience and make it more immersive, 77% of Gen Z and 75% of Millennials say they prefer to watch sports outside of venues, compared to 53% of Baby Boomers and 32% above 70 years old.**

### **Increasing preference for outside-of-venue sports experiences, especially for younger fans**

While the excitement of attending live events remains strong for large global competitions such as the Olympics, or World championships, this might not be the case for local and regular league games. This shift in fan preference is translating into reduced visits to sports events. In Capgemini’s previous research from 2019<sup>1</sup>, 47% of fans globally visited sporting grounds often, but this has fallen to 34% today – with a significant generation gap again: 49% of fans above 70 still visit the venue often, versus only 17% of Gen Z. This swing is most significant in Australia and the UK, where half as many people currently watch sports in-person often compared to 2019<sup>2</sup>, while France and Germany have seen the smallest decline (less than 5 percentage points). In fact, only 37% of fans globally have visited a venue in the past 12 months, compared to 80% in 2019. Fans with impairments are, in particular, less satisfied with the overall accessibility arrangements in the venue (only 48%), however they are confident that appropriate technologies can help them access and enjoy in-person sporting events more fully.<sup>3</sup>

### **Smart devices, streaming and social media dominate sport consumption**

The channels and devices through which fans are watching sports events have also shifted significantly in a few short years. Mobile devices have risen to the fore, although overall, fans still prefer TV for watching games, suggesting that smart devices provide a supplementary option for consuming sport, on-the-go or “multi-screening”. In 2019, only 40% of fans picked smartphone screens as a preferred device to watch games, versus 70% today (in particular a staggering 78% of Gen Z and 74% of Millennials). Streaming platforms as well as social media have also seen a boost in viewing significance: in 2019, just 39% of fans mentioned streaming platforms as a preferred option for watching sports. This has nearly doubled to 75% today. For social media, that has jumped from 44% in 2019 to 64% today, driven by younger generations.

According to the report, fans value their smartphone as a companion to enhance the viewing experiences, whether at home or at the venue. Over two-thirds (68%) of fans have used a mobile device to receive

<sup>1</sup> Capgemini Research Institute, [Emerging Technologies in Sports: Reimagining the Fan Experience](#), December 2019.

<sup>2</sup> 53% of fans watched sports in-venue in Australia and 52% in the UK in 2019 versus 26% and 28% in 2023, respectively

<sup>3</sup> Alongside physical accessibility and inadequate signage issues, 59% of fans with a disability (either physical, mental, or cognitive) cite a lack of user friendliness in existing digital technologies designed to enhance the experience.



regular game/player information while watching the game live, and 65% for 360-degree video replays. 68% of fans would also like to try using their mobile device to get player information, live stats etc. by pointing at players while present at the venue, using augmented reality. Finally, fans would also be interested in enhanced sports experiences such as in the metaverse. Two thirds of them, for example, would be interested in purchasing digital merchandise to wear in virtual worlds (66%) or attending games, and socializing virtually with fans or players in a virtual sports venue (64%).

*"In the last few years, the ways in which we're able to consume sport have completely transformed," said Pascal Brier, Chief Innovation Officer at Capgemini and member of the Group Executive Committee. "Technology is granting a greater level of immersion and interactivity with the game, even if we're viewing it from thousands of miles away. This provides sports businesses with the potential to reach the next generation of global fans in new, innovative, and exciting ways. However, our research also indicates that technological advancements around the in-stadium experience have not kept pace. The next stage of the digital transformation of sport is to similarly revolutionize how we view sport in-person."*

### **Technology is now a key competitive advantage for players and teams**

Sports professionals and teams are increasingly leveraging technology in order to improve training and performance. This spans using devices such as smart watches or smart glasses through to measuring performance and vital functions, analyzing positioning and strategy in live games, or designing and reviewing individual player training programs. Technology is also increasingly embedded into sports equipment, and also used in live games to assist in decision making.

### **Increased interest in women's sports and sustainability**

The report also finds that besides a growing prominence of technology in sports in the last few years, there is a growing interest in watching women's games and sustainability amongst sports fans. Two thirds of them are interested in watching more women's games for the sports they follow, and would also like to see equal opportunities and resources offered to women players. For certain sports, such as swimming, basketball, tennis and parasports, the viewing figures for men's and women's games are similar, with many viewers choosing to watch both. The report found a significant rise in the number of viewers choosing to watch both men's and women's games for sports such as basketball (+34%), baseball (+20%), and American football (+28%), compared to 2019. In tennis, the report found a 10% rise in viewership for women-only games.

Across countries and age groups, 67% of fans feel disappointed that the teams/players they follow are insufficiently prioritizing environmental sustainability. And over three fourths of them say that good technology-enhanced outside-venue experiences will encourage them to consume sports in this way more often to curtail carbon footprint and increase sustainability.

Read the full report here: <https://www.capgemini.com/insights/research-library/the-future-of-sports/>

### **Methodology**

For this report, the Capgemini Research Institute conducted a quantitative survey of 12,000 sports fans over the age of 18 across 11 countries, in March and April 2023: Australia, Canada, France, Germany, Italy, Japan, the Netherlands, Spain, Sweden, the UK, and the US. Out of these, nearly 1,110 of the fans were impaired, either physically, mentally, or cognitively. To qualify for inclusion in the survey, fans must regularly watch and follow sports. For the purposes of comparison with the 2019 research, Capgemini excluded respondents from Spain, Italy, Sweden, Japan, and Brazil. The Institute also interviewed 15 international players, coaches, and sports tech experts.

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