

COPA90

SPRING 2019

COPA90

THE MODERN FOOTBALL FAN 2.0

The Modern Football Fan 2.0

WHAT MAKES THEM TICK?

An exploration of their behaviours, their values, their motivations



MODERN FOOTBALL FAN 2

This is our second **deep dive** into the fast-paced, eclectic world of young football fans.

In 2018, we paid a lot of attention to the exciting technological and entertainment related trends that were transforming the fan mindset [and broader game] as we know it.

With fans now enjoying an unparalleled level of access, these riches have also brought unwelcome excesses such as fringe opinions being emboldened by the social media swell, and traditional football media views that jar with the diverse and conscientious Modern Fan community.

These increasingly visible challenges, along with the glacial progress of football's structural bodies, are bringing these young Modern Fans to a crossroads. They are seriously questioning what 'brand' of football is fit for purpose (whether that be relating to national identity, gender, social issues, or wider politics), and what they are willing to do to achieve it.

We have interrogated these hot topics, and also cast our net wide, conducting research in the USA, UK, Brazil and China, to better understand local nuances of the Modern Football Fan.

Welcome to the Modern Fan Report 2019.



- 1. Rear view mirror... a look back
- 2. The future of football is female
- 3. Modern Fans and football in 2019

REAR VIEW MIRROR...

Section 01

A look back

The Modern
Football Fan

The Modern
Football Fan

Here's a quick look back at some of last
year's observations and predictions, and
whether we were on the right track.

p06 — BROADCAST CONTEXT

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BROADCAST

context

"By the end of the World Cup group stage, which consisted of 48 total matches, Telemundo said its live streaming coverage achieved a total of 105.3 million live streams... [they had] between 48% and 51% of its live digital viewers consistently watch the games on their smartphones."

- **Digiday**

The Modern Football Fan

"Digital companies are continuing to experiment with personalisation and customisation of the broadcast experience. For example, Twitter will have player-specific cameras in the second half of NBA games while letting users vote on who they want to follow. It's complementary to the TV broadcast and a new way to add to the game day experience for fans."

This also highlights how rights holders are working with technology companies to create added value to fans while protecting their valuable rights." - **Rudolf Vidal, President Americas, Bayern Munich**

"Yes, the likes of Facebook, Amazon & DAZN are quickly moving in and I'm sure will have great success. However, the investments to date have been relatively small compared to what broadcasters such as Sky are investing. Furthermore, more traditional broadcasters aren't exactly TV only, they are also busy growing their own digital services to future proof themselves against increasing digital competition." - **Dan Holland, VP of Global Strategy & Comms—Dentsu Aegis**

"Once we've done our warm-ups, and we're back in the changing room, someone will stream the game on their phone, and we'll all watch for 10 minutes before our own game kicks off." - **Fan, LDN**

In last year's report we highlighted the rapidly evolving broadcast context in which fans are consuming the live game, and this trend shows no signs of abating any time soon.

The World Cup helped further pronounce this shift from broadcast to streaming, with a total of 31.2 million browsers watching the group matches through the BBC platform compared with 32 million online viewers for the whole of the Brazil WC 2014.¥

New heavyweight media brands such as Amazon, as well as illicit streaming apps like Live Player, are

only stretching the broadcasting landscape further for young Modern Fans, providing more options to get a quick, hassle-free fix of live football on the go.

Broadcasters are doing what they can to adapt to these behaviours—such as ESPN+ and Telemundo offering free streams for the group stages of the World Cup.

With these behaviours increasingly entrenched amongst young football fans, new digital players will continue to test opportunities across the broadcast landscape, as they loosen the grip of mainstream broadcasters on the 90 mins.



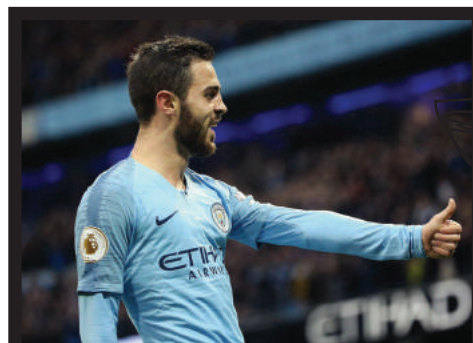
NEW VOICES

of authority

"I'm excited about seeing a wider range of 'football creators' becoming more visible in the game." - **Fan, NYC**

"I do like the more real-fan focused 'influencers' that are emerging, talking the way fans actually talk about things they actually talk about. Arsenal TV, for example, has been one of the most entertaining things on the internet over the last couple of seasons." - **Dan Holland, VP of Global Strategy & Comms—Dentsu Aegis**

"The work that was done by the FA during the World Cup with Craig Mitch (The Lions' Den) is a good example of how to work authentically with influencers in football. I think it worked well that Craig had a genuine and natural relationship with some of the younger players in the squad. Moving forward I could see more traditional hosts/pundits being replaced with more micro-influencers who bring a point of difference to a very traditional broadcasting model." - **Adam Field, Global Sports Marketing, Chelsea Football Club**



Fan designed celebrations—Vuj asked Bernardo Silva to do a 'Have a Nice' celebration when he next scored for Man City, and Bernardo Silva then actually does it. Bernardo later posts it on IG and tags Vuj, linking it all back to the COPA90 community.



Poet designing a Puma football boot that Marko Arnautovic then scores with...



F2 Freestylers sign as agents for Rhian Brewster; showing the expanding influence of football creators behind the scenes as well.

At the end of 2018, we saw the true influence of the 'new bastions of power' when COPA90's David 'Vuj' Vujančić requested Bernardo Silva to perform his trademark 'Have a Nice' celebration should he score. The Portuguese obliged the following week when he netted against Bournemouth, transferring YouTube content into an on-pitch in-game moment for all around the world to see.

Brands have now even begun collaborating on new products with football creators in the same way they do with players. In our last report, we highlighted how these new voices of authority were a key influence on Modern Fans, but we

can now see how this influence has spread from fans to players, directly influencing action on the pitch.

We're witnessing the emergence of a new ecosystem of influence in football, one based on the constant digital chatter amongst players, fans and football creators.

This is just the start, in the future there will be greater integration of this influence into football's ecosystem. From social media via football creators, onto players, back to fans on socials, this entangled sphere of influence will only create more exciting and rich crossovers across the fan landscape.

Player Brands ON THE RISE

"I feel terrible that that happened and he [Sterling] had to talk about it, but I feel good that he *d/d* talk about it because it shows that they're more than just athletes and they have a voice."

- Fan, NYC

"I think it's incredibly smart that [Ronaldo] can become one of the biggest people on Instagram - it goes to show that football is at the top in terms of global recognition."

- Fan, NYC

Arsenal's Héctor Bellerín announced in February, on the day of his injury against Chelsea, that he would be recording vlogs to share his journey back to fitness and give fans an insight into his life while off the pitch.

FROM PLAYER BRANDS TO CULTURAL SYMBOLS



08

Memphis Depay's foray into music.

Raheem Sterling was recently thrust into the centre of the public debate on racism after being abused during a game this season. His intelligent and thoughtful response critiquing the institutionalised racism he sees at the heart of this problem has seen him become the *de facto* figurehead for a new generation of not just football players, but young people willing to stand up and challenge the root causes of racial injustice. It has elevated him into a new sphere of cultural influence.

Both US and UK fans were able to connect Raheem's line of thoughts with Colin Kaepernick's high profile

"It's not like the days of Gattuso or Keane... with social media, players are half entertainers and half athletes now. So that's why old guys think the players aren't serious enough or focused... but that's just a generational thing."

- Fan, LDN

stand against inequality and social injustice in the NFL.

As we'll discuss in later chapters, there's an increasing expectation from these Modern Fans, as opposed to older generation of fans, that players ought to speak out on the socio-cultural and political issues of the day.

We expect to see more globally recognised players using their voice on issues, not just entertainment, as a handful of players go from being seen as commercial brands to something more culturally symbolic.

"There are a handful of icons in the modern game that can command audiences and attention that arguably competes with the major clubs and leagues. We have seen the popularity of players manifest itself on social media, where our data sample has shown that they achieve a very strong average engagement rate of 3.3%. A possible explanation being that football stars can be interesting to a broader audience — think lifestyle, celebrity culture — than clubs or leagues that resonate mainly with football fans."

- James Bisgrove, Head of Sponsor Partnership Management for UCL and UEL

"As many as 46% of 16-24 fans in the UK support a second club, with 27% of those supporting three clubs or more, according to COPA90 research. An idea such as OTRO should play well in a far less club-loyal football world."

- WARC

"I think Sterling NAILED IT when he compared the two stories in the press, and showed all the racist cliches the media were endorsing. Like with his gun tattoo - the meaning behind it is very deep, but the press just say he's glorifying violence."

- Fan, LDN

Juventus gained 4.7m fans when signing Ronaldo, Real lost 1m fans.

Twelve footballers have more than 10m Twitter followers. Only five clubs have reached that milestone.

NFL relaxed rules on player celebrations helped increase viral-ness of the NFL, team and player brands.

09

"When I was captain of my high school team, learning about formations and team balance playing FIFA really helped me." - **Fan, NYC**

"You see a lot of Spurs players on it [Fortnite], and I loved it when Griezmann started doing the 'take the L' celebration." - **Fan, LDN**

"I look at his name and then try to remember how good he was on FIFA." - **Alex Iwobi, Arsenal**

"Playing video games such as FIFA can help players pick up the intricacies of the sport at a young age. By the time they are six years old, a lot of children are already aware of 4-4-2, 3-5-2, wingers, defensive midfielders and the key attributes that make the best players the best." - **The Guardian**

BLURRED

(BETWEEN VIRTUAL AND PHYSICAL)

LINES

The Modern Football Fan

Last year we wrote about the increasingly blurry line between the virtual gaming world and the 'real world' game for Modern Fans.

Since then another edition of FIFA has come and gone, and with limited edition digital club shirts created in collaboration with adidas, EA added yet another layer of real world crossover to the game and for its players.

However, it's the emergence of another game, *Fortnite*, that

has created the most significant blurring of the real and virtual game this year. This was most notable with Antoine Griezmann's *Fortnite* inspired celebrations at the World Cup, but also in the way in which clubs like Marseille or Independiente del Valle in Ecuador have made viral player and squad announcements based on the game via their social platforms.

With football and gaming sitting more closely than ever, it's little wonder the FA have even

recommended junior coaches to look to video games for inspiration in more effectively training young English players. ¥

So, where next? If Alex Hunter has advertised adidas boots, promoted shirts for Real and been sponsored by Coca-Cola, what will be the next stage? Will games publishers create more virtual characters especially for sports brands to fight over? Will they have to negotiate with virtual agents? We won't have to wait long to find out.

Many industry insiders now believe the heavy use of games like FIFA is creating an emerging generation of smarter and more tactically aware players. *

Beyond gaming, this blurring of the real and the virtual helped allow Spurs fans to get an early virtual tour of their new stadium via FIFA19 before it was actually finished, as well as providing a testing lab to pilot VAR innovations, footballs, and noise levels.



Many unfortunate players have been superseded by their virtual twin's trajectory. Mid 00's favourite Cherno Samba was an early casualty, as are current players such as Yuri Tielemans and Martin Ødegaard, who are both struggling to match the success and popularity of their virtual avatars on Football Manager. Recently, this seems to have been the opposite for unheralded but statistically powerful French right back Kenny Lala, who is now realising his virtual potential and making a name for himself in Ligue 1.

"It's tough to measure direct impact, with the closest measure so far being the global media coverage of the series, as well as its theme song by local singer-songwriter The Lake Poets hitting number four on the UK iTunes charts." - **Fast Company**

AN EVER EXPANDING UNIVERSE

"We've still not had the 'Space Jam' equivalent in soccer — I'd love to see that!" - **Fan, NYC**



In this chapter last year we wrote about our Modern Fans' insatiable appetite for bitesize chunks of football content in the form of gifs, videos, and memes. And whilst we see no obvious sign of their desire for bitesize info decreasing, we're seeing an expansion of their content universes to include more long form content also.

Netflix's football docuseries '*Sunderland 'Til I Die*' has laid a template for a new type of characteristically English lens into the inside machinations of a football club and its surrounding community. This characteristically English style is in stark contrast to the more success-based narrative and, perhaps more American tone and format, of Man City's '*All or Nothing*' on Amazon.

Aside from this new wave of football docuseries, our Modern Fans also told us of their increasing interest in the wide array of football podcasts. Some Modern Fans were also creating them.

Ultimately, whether visually or aurally, our Modern Fan is craving new, interesting stories, and happy to be fed this in the medium and style that best fits the story—whether this is in short-form bitesize news over Snapchat or as a longform documentary piece told over Netflix.

We expect to see more interesting and complex storytelling emerge from inside the football universe crossing over into the wider pop cultural sphere thanks to digital platforms like Netflix and Amazon.

This will be particularly important in bringing in new fanbases in emerging footballing territories like China.

The Modern
Football Fan

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Section 02

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- p34 — THE FUTURE OF FOOTBALL IS FEMALE

A year ago, in our first Modern Fan Report, we said:

“Just as games like the FIFA series now enable women’s teams play, the female voice within football becomes rightly normalised for the average fan. Brands with purpose and innovation will push the women’s game, leading to further changes in the consumption of the game for us all.”

Not too long after we published that, Alex Scott was seen by millions outshining her male pundits on the BBC’s World Cup coverage (which she continues to do on a regular basis, much to the chagrin of Graeme Souness), and Visa inked a landmark seven-year sponsorship deal with UEFA as the first partner to the women’s game and competitions.

Safe to say we called that one.

“Athletic Bilbao set a new record for attendance at a women’s soccer game in Spain as 48,121 people watched their side’s Copa de la Reina quarterfinal tie against Atlético Madrid... the figure beats that of any attendances for Athletic’s men’s La Liga games this season, with 46,884 the biggest crowd”
- The FA

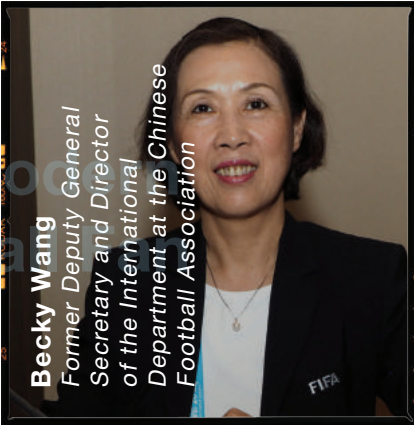
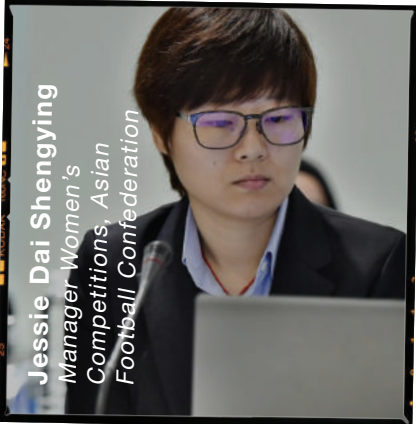
In 2019, with match day attendances and viewing figures regularly reaching new heights along with investment in participation, commercial development, and elite player development pouring in, it feels like a significant cultural change in attitude and awareness of the women’s game is already underway.

Combine that with the World Cup kicking off in Paris on June 7th, and we have a perfect storm brewing that’ll make 2019 the most important year for the women’s game to date.

And so, in this bumper year, we wanted to give you the lowdown on what you need to know about the women’s game and women in football more generally.

Alongside our own research, we’ve also been chopping it up with some very influential women to set the scene for what is certain to be a momentous year for women and football.

Our interviewees included:



“[The deal with Visa] is the biggest sign of that potential to date and it will also accelerate growth. Unbundling the rights to women’s football from the men’s for the first time means that UEFA will be able to measure the worth and growth of the game in its own right like never before. Under the new partnership, all levels of the women’s game, from grassroots to the Women’s Champions League, will be backed”
- *The Guardian*

“England’s crunch Euro 2017 semi-final against Holland drew the biggest ever UK audience for a women’s football match [with] a peak audience of 4 million tuned in to Channel 4.”
- *The Guardian*

Fans are being starved of regular women’s football content.

Record attendances at showpiece fixtures in the past year have reinforced the growing appetite for the women’s game.

And yet, there remains a lack of access or awareness of regular women’s football content.

Our data revealed that 44% of fans feel like the women’s game doesn’t pop up on their radars frequently enough, and a further 26% do not know where to access game coverage.

Fans were more likely to consume highlights, which are much more obtainable via social media, as their primary source of content on the women’s game, perhaps pointing to a lack of consistent TV broadcast and online streaming options.

FANS WANT MORE

“A record attendance of 45,423 fans attended the FA Women’s FA Cup final last year. It was the fourth year in a row the record had been broken with over 10,000 more fans attending than in 2017.”
- *The FA*

“If I want to watch the men’s game I can put any channel on, with the women’s game you can’t just turn on the TV and find it, you have to go out of your way to see it live most of the time.”
- *Fan, LDN*

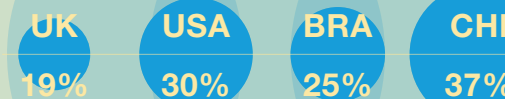
Case Study

Athletic Bilbao have been lauded by the Spanish Football Federation for their initiative of a 5 euro entry fee for the general public and free entry for season ticket holders to watch their women’s team play—this has led to record-breaking attendances, surpassing those for some men’s teams games.

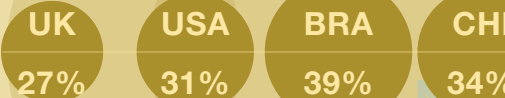
The appetite is clearly there, but there is an issue of profile, outside of landmark fixtures, and access to a consistent product that seem to be a barrier for fans.

Fans of the women’s game ¥

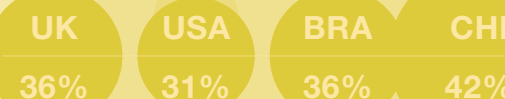
Watch live women’s football games online



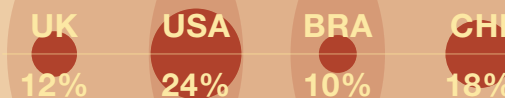
Watch live women’s football games on TV



Watch highlights of women’s football games



Attend live women’s football games



FANS WANT MORE

“My dad has gotten into the women’s game just because you can watch games via the red button on the BBC.”
- *Fan, LDN*

“If the media doesn’t show the game, it’s a problem, our matches become hard to find. More positive coverage will have a huge impact on all aspects of the sport, including the players.”

- *Lina Magull*

“When the 10 o'clock news was delayed for the GB women's gold medal hockey match, people looked at it as a great sports moment. That will come with women's football.”
- Jane Purdon, CEO of Women in Football

Even with a lack of visibility and exposure of the women's game, over half of those we spoke to, both male and female, still describe themselves as either fans of the women's game or as being interested to watch and learn more about it.

And it's clear that given the opportunity to consume the women's game more regularly, fans go on to adopt a 'women's football is football' mentality; often becoming vocal advocates for the game.

Our data shows that in the US, this behaviour is already quite commonplace, with over a quarter of US fans we surveyed already regularly engaging in online discussions about the game or sharing content related to it.

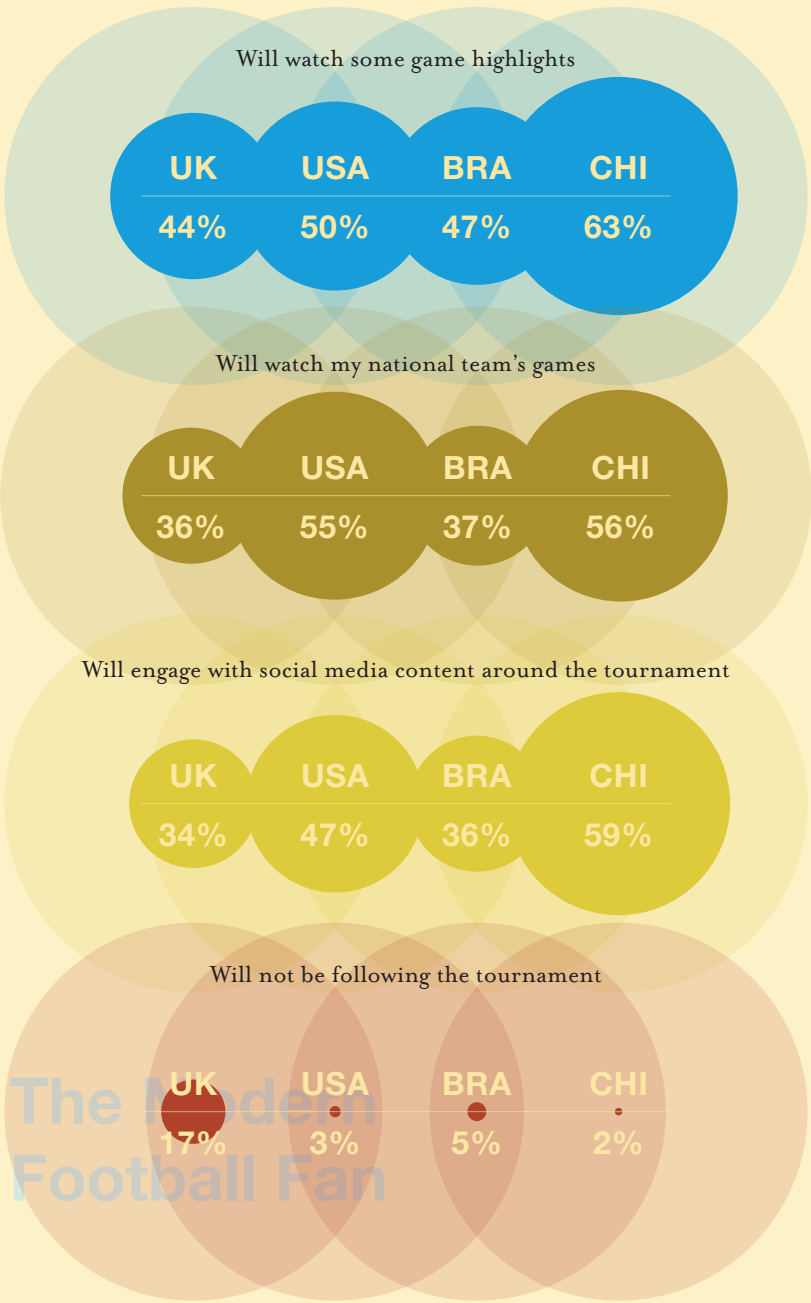
The upcoming World Cup presents a perfect opportunity to create a whole new army of advocates for the women's game.

Three-quarters of fans we spoke to are excited about the upcoming WWC. The excitement is even more pronounced in countries where the women's national teams have traditionally (far) outperformed their men's teams, like China.

Fans are anticipating and excited to see more women's game content popping up on feeds and TV with the upcoming World Cup, but the challenge will be to join the dots for fans after the tournament in regularly delivering them high-quality content on their terms.

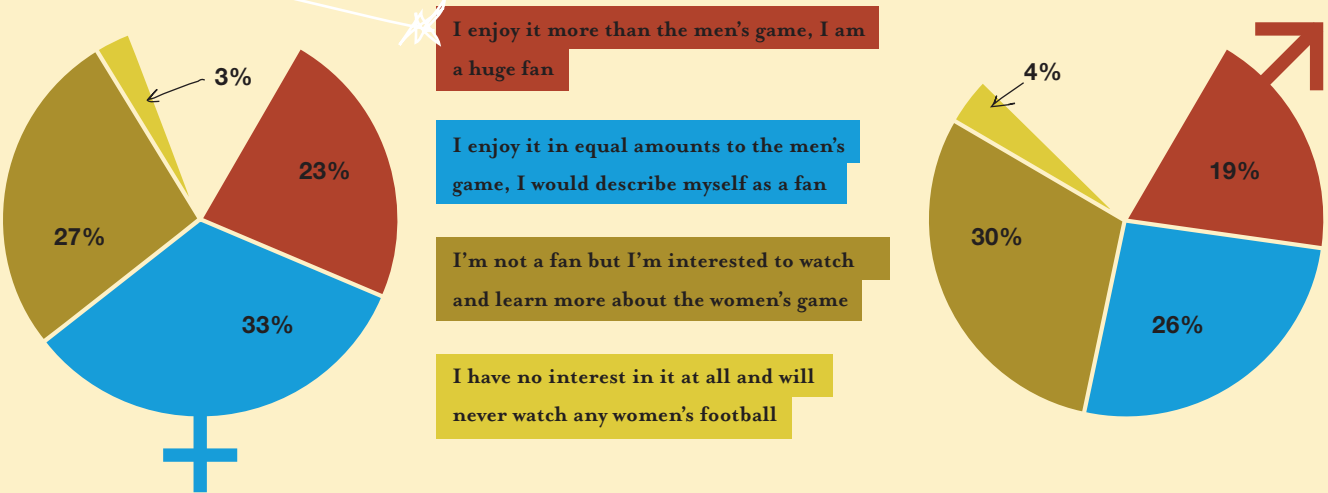
How I plan to engage/consume WWC 19 ¥

“I'm passionate about women's football as a whole. I support women's football rather than a specific team. Fans like us need to take ownership to help the game grow.” - Fan, LDN



“When I first went to see Chelsea women's play I wasn't expecting much, but it was really good. Now when I speak to other fans I try to expose them to the women's game.” - Fan, LDN

Current relationship with women's game ¥



FEMALE SUPERSTARS LOADING

FEMALE SUPERSTARS LOADING

We are about to see a new generation of female football player emerge; they are the best footballers the sport has ever seen. Stronger, faster, and more technical than ever before, these players have fans already primed to follow them over women's teams.

Superstars like Alex Morgan, who has 5.5m followers on Instagram, are already household names in the US, but a younger generation of female footballers like Jordan Nobbs and Lina Magull, who feel rightly entitled to what their hard work and talent has earned them, are making names for themselves.

Our data shows that fans are more likely to follow female players than teams, especially in USA and Brazil—countries in which female players like Megan Rapinoe and Marta have achieved a place in the wider pop cultural landscape—where a quarter of fans surveyed follow female players on social media.

Some of this younger generation of players are also branching out into other cultural scenes, such as music and entertainment, but doing so in a way that brings a wider audience to the sport.

It's important to bear in mind that in a landscape lacking consistent TV and streaming coverage, fans are already going directly to the players. It is players—old guard and emerging—who are the current ambassadors and drivers of the sport.

FEMALE SUPERSTARS LOADING

"The perfect scenario for women's football is more media... the more people that can watch us, come to our games and see the way we play—it will change opinions."
- Jordan Nobbs of Arsenal Football Club and England

"The Euros has changed the situation at home completely. Two years ago, some of our games weren't even on TV. Now people stay at home to watch our games. Now, every little girl knows that Holland has a women's national team. We all feel we are heroes for them, that they look up to us. That we can inspire them. That they realise that a girl from Holland can win the Euros and play for Barcelona. I used to say I wanted to be like Ronaldinho. Now they're saying they want to be like Vivianne Miedema or Daniëlle van de Donk or Lieke Martens."

- Lieke Martens for *Players Tribune*

"These women are about to unleash a power that they didn't realise they had before."

- Abby Wambach, Former USWNT player

"We will see the creation of more role models; social media will show the emotions all over the world."

- Heike Ulrich, Head of the German Football Association

BBC Sport's 'Chelcee Away' is an online show featuring singer-songwriter and footballer Chelcee Grimes.

Case Study



Case Study

Lieke Martens featured alongside Mbappé and Neymar as the face of Nike's Born Mercurial campaign.

The Modern Football Fan

Billie Jean King was an activist in tennis, and many people have tried with football. For some reason - it hasn't worked. Today, the brands have been the activists to get women's football where it should be..."

- Ruth Hooper, Brand and Marketing Strategist (formerly Brand Director at Nike)

- Anna Hill, chief marketing officer, Disney UK and Ireland. — THE DRUM

FEMALE SUPERSTARS LOADING

Understand that this emerging generation of players are no longer willing to accept the non-parity standards that previously existed in the game. They are pushing for their space and opportunity in the sport by building their own personal player brands.

Brands like Nike, adidas, and PUMA also have an important job to do in not only providing platforms to create the superstars and role models for the next generation of players and fans but also in normalising the women's game for a wider audience.

They have the opportunity to both elevate players and the game, as well as send a powerful message of inclusivity and gender equality.

As such brand collaboration in the women's game is often talked about less cynically when compared with the men's game, it offers a genuine opportunity for partnership where both parties share a strong desire to see the sport grow.

Case Study

Disney and The FA have been working together to get more girls involved in football as part of a three-year partnership which aims to increase the role of football in UK girls' lives. The partnership will target parents and kids ahead of the FA's Girls' Football Week.

"This campaign highlights how, by using Disney's storytelling and characters, we can help the FA attract new audiences to the FA Girls' Football Week and showcase that there are opportunities for girls of all ages and experience to take part; from those who have never kicked a ball before, to those who play regularly."

FEMALE SUPERSTARS LOADING



The Modern Football Fan

"Powerful, athletic, confident, strong women playing football to a fantastic level, playing in front of a huge global audience is going to be a powerful message to both men and women that women can do anything."

- Kelly Simmons, Head of the Women's Game at the Football Association

RE-SHAPING CULTURE FOR THE BETTER

The Modern Football Fan

"For too long, sport has been male, stale and pale."
- *Ruth Hooper, Brand and Marketing Strategist (formerly Brand Director at Nike)*

"In the UK women are brought on to be experts of the men's game, none in Germany. There's an opportunity being missed."
- *Lina Magull, Bayern Munich and Germany player*

"These days I even hear my uncle referencing Alex Scott — she gets bare respect"
- *Fan, LDN*

"When one person penetrates, we must follow up with more to ensure it's not a one-off. Then we need them to bring that kudos back to the women's game!"
- *Former USWNT Player, Captain, Coach & Technical Director, Director of the Women's US National Team Youth Program*

"We've played at the elite level, and we do know our trade inside out—that's football; it's not women's football, it's football."
- *Rachel Brown-Finnis Former Everton & @England Women's Goalkeeper (via BT Sport)*
"Reic Graeme Souness stuck in Super Sunday time warp as Alex Scott makes Sky Sports history"
- *[iNews headline]*

It's our belief that female voices in football will soon cease to be seen as a novelty and will soon be considered the norm.

This certainly seems clear when speaking to fans for whom female pundits like Alex Scott or Ali Wagner not only do the job as good as, or better than, their male counterparts but importantly they're pushing analysis forward, bringing a fresh, new perspectives to the game, which is well appreciated by fans.

While we should be celebrating the new wave of female experts on our screens dissecting the men's game, we should also be asking ourselves why it has taken so long?

Women have long since been part of the day-to-day fabric of the men's football landscape. Premier League stats show that a quarter of match day attendees in the ground are female. So why is it so outrageous for some to have one of four pundits' chairs filled by a woman?

The real success is that womens' presence in the game is slowly becoming normalised in spite of the very recent live experiences of prejudice and antiquated behaviour.

Our experts and fans shared shocking stories of sexism, social media abuse, aggression, and threats. Yet, it's almost as if this atmosphere of antagonism has accelerated the positive evolution of women's roles in the game, and

in some instances helped wider society begin to reframe how women are viewed and treated.

Outside of Europe in particular, in cultures where women still face huge social challenges, football can be the vehicle to inspire and create social change.

For example in China, where previously rigid social constructs are shifting fast, football, as well as its surrounding culture and community, is providing female football fans with a space to stretch the notions of femininity.

"I'm totally driven by the fact that I want women to have a better opportunity than I had. I want this generation of girls to play whatever sport they want."

- **Kelly Simmons, MBE, Director at the Football Association**

"Football helps women be complete, it gives you recreation and friends, your life is so much richer."

- **Becky Wang, Former Deputy General Secretary and Director of the International Department at the Chinese Football Association**

"This game is changing the world... we have been changing the global consciousness about what women can do, forcing men to think of us as equal."

- **Abby Wambach, Former USWNT player**

Case Study

"A seven-year-old girl who was mocked for playing football in a team dominated by boys has been invited to be a mascot for the Lionesses during their next match."

- **Independent**

"The gender barriers are breaking down more and more every year, more girls are playing, more and more people are coming to watch games"

- **Kelly Simmons, MBE, Director at the Football Association**

"When a man still sees Ada Hegerberg — such an accomplished woman — as a sex object, it just goes to show how far we still have to go as a society."

- **Fan, NYC**

"I think back to when I was younger and how hard it was always trying to get guys to play football with me or if I wanted to watch women's football I couldn't. Thinking how far we've come is amazing, and it's only going to go up from here."

- **Fan, LDN**

"China had the biggest TV crew at the World Cup in Russia. They had a female commentator, she was not an expert, but it was a good start"

- **Becky Wang, Former Deputy General Secretary and Director of the International Department at the Chinese Football Association**

The Modern Football Fan

"The [Chilean] forward Fernanda Pinilla, a driving force on and off the field, says the current feminist movements 'have inspired totally different visions to those that we have been accustomed to. I feel that there has been a complete empowerment of Latin American women.'"

- **The Guardian**

Modern Fans are on the lookout for fresh perspectives to widen and deepen the conversation on the game. They also want new and varied types of football content to consume, and importantly they want to see and hear it from ages, races, and genders that are different to what feels “traditional”.

And in the face of some pervasive cultural headwinds, what about Ada Hegerberg being asked to ‘twerk’ on stage shortly after being

announced as the first ever Ballon d’Or winner? We see the tide turning in this more representative direction—the backlash to the Ballon d’Or incident being a good indicator of this cultural mood shift.

Importantly, this change doesn’t only benefit female fans of the game. For some male fans we spoke with, the conversation around women in football has led them to reflect on wider issues of sexism and how gendered

behaviour can directly impact and influence their relationship with football and football culture. (More on this in our ‘More Than Rainbow Laces’ chapter later.)

There’s still work to be done in changing attitudes and raising the profile of the game, but fans know what we know: that the more women involved in football at every level of the game, the better it is for ALL fans of the game, and potentially for society at large.



The Modern Football Fan

“There’s so much negativity tied up in being seen as an ‘England Fan’, but I feel like I can back the England women’s team in a way that I can’t with the men’s team.”

- (Male) Fan, LDN

“It’s things like seeing photos of Fran Kirby next to Eden Hazard at Stamford Bridge—you need to shove it in people’s face and say ‘this is normal!’”

- Fan, LDN

“The FA has done a lot of work to make it very safe,” says Amy. “It’s more about getting involved in conversations outside. I used to go on to Leicester City forums—as soon as people saw my name was Amy, it would be, ‘What does this woman know?’”

- BBC

Scotland fans call out the #Everyday sexism observed when promoting the new Scotland kit.

Case Study



The Modern Football Fan

IT ALL STARTS AT GRASSROOTS

In England and Europe, more money is flowing into the women's game than ever before. However, this investment is often centred on a handful of successful European clubs and has yet to trickle down to the rest of the game.

We're still regularly hearing stories of the financial hardships faced by professional clubs with well-resourced men's teams, like Wilfried Zaha's donation to Crystal Palace Women's Team or the crowdfunding campaign to keep Millwall's Lionesses afloat.

Or in countries without well funded men's leagues to rely on, we hear of admirable tales of self-organisation, as in

the case of the Chilean national team where, as The Guardian tells us: "players from the national women's side formed a players' union in 2016, which eventually integrated into the men's union and gained enough momentum to reorganise the women's team after years of neglect. It was the union that convinced the Chilean federation to host the Copa América, another step toward the revitalisation of women's football on the continent."

However, individual gestures, while well intentioned, aren't enough to sustain the game in the long run. Goodwill will only take the women's game so far. Genuine financial commitment from clubs, federations, like the

IT ALL STARTS AT GRASSROOTS

Norwegian FA and New Zealand agreeing to pay their men's and women's team equal pay, as well as media and brands to the infrastructure around the game will be key in defining the next phase of development of the women's game.¥

We're seeing the green shoots of these longer-term structural development investments, such as initiatives like the FA's Wildcats. The programme, which provides football opportunities for girls aged 5–11 years, has over 800 centres nationwide and has attracted over 17,000 new girls to play the game for the first time—and is only in its second full year.

The Modern
Football Fan

IT ALL STARTS AT GRASSROOTS

"There is more money in women's soccer in England than there has ever been. Last summer, the country's highest tier, the Women's Super League (W.S.L.), became, for the first time, fully professional, with a broadcasting arrangement with the BBC. England's biggest clubs, including Manchester City, Chelsea, and Arsenal have invested heavily in their women's teams in recent years, spending not just on homegrown players but on high-profile imports, too."

- NY Times

The Modern
Football Fan

"If you're a woman playing the game, you have to be passionate about it; you must love the game. The chance to be a professional and earn enough money to support your family financially isn't there yet."

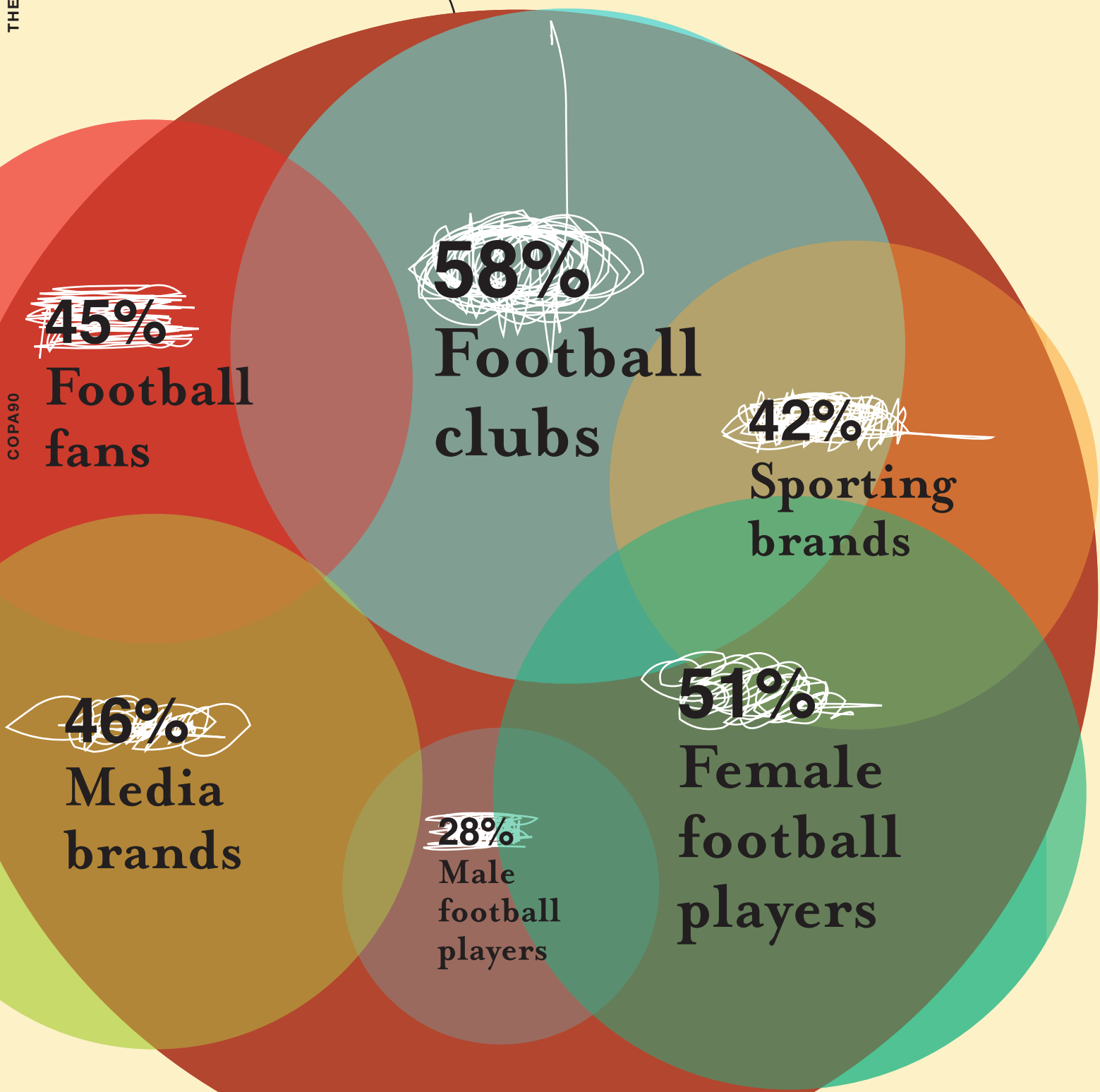
- *Becky Wang, Former Deputy General Secretary and Director of the International Department at the Chinese Football Association*

"The women's game is getting better, faster, and stronger; commercial investment should get in at the ground floor to make more of it in the long run."

- *Abby Wambach, Former USWNT player*

Fans think the issues holding back the women’s game relate to a lack of development in the domestic game. Over a third of fans we surveyed blamed their lack of interest on underfunding in the domestic game.

When we asked fans who had the power to create positive changes they want to see in the women’s game, they said the following:



“There’s been a criticism that women’s football is on the same level as non-league football... no wonder if the investment is the same as non-league level... but in the last couple of years, it feels like something has happened, there is a real and powerful change happening that’s going to inspire a new generation of women.”
- Ruth Hooper, Brand and Marketing Strategist (formerly Brand Director at Nike)

“It feels like there is a paradoxical relationship between the men’s and women’s game where they are crossing over at the moment. The men’s game is going back to its roots dealing with issues around identity, community, and social issues, which have long been championed in the women’s game, which in turn is becoming more professional and attractive to brands.”
- Rebecca Smith, Global Executive Director of Women’s Game, COPA90

They expect wealthy clubs to lead this charge, with the players being celebrated as the figureheads of this movement.

Tellingly, our fans also believe there’s an equal role to be played by both commercial brands as well as fans themselves. They believe there’s a need for a bottom-up and top-down approach to help the game to grow.

For our insiders, it’s the bottom of the pyramid, at grassroots level, with a lack of parity of access to funding, facilities, media, marketing, resources, staffing, medical support, technical support, coaching, refereeing, where investment most needs to be funnelled.

Whether top-down or bottom-up, investment and more parity in opportunity and access in the women’s game will be key in defining how far the game can progress, as well as how quickly.

“According to the annual global sports salaries survey in 2017, the average woman playing in the FA Women’s Super League (FAWSL) is paid £27,000 — about one per cent of the salary of a male Premier League player.” – BBC

Fact. Women's football and women in football have never had parity of access into the sport, in terms of funding, marketing, coaching, facilities, resources, media attention, technical support, structured leagues, not to mention the ban on the sport in some countries... the list goes on...

The deck has always been stacked in favour of the men's game, and yet the women's game and **women in football are not only flourishing, but they're adding new dimensions and dynamics to an old sport**, and in doing so have already made the game better for all of us. They've not just put it top bins, they've done it with their weaker foot.

The movement has started.

The stage is set for France this summer, and beyond that, it's only up from here. First to market has a massive advantage; the women's game is waiting for some game changers. This space is definitely the most exciting and the biggest growth area for 2019 and beyond. **Evolve or die.**

...The Future of Football is Female

MODERN FANS AND FOOTBALL IN 2019

BEFORE we dig into new behaviours and hot topics, let's check back in on how these fans are interacting with football content at large.

The Modern
Football Fan

To recap, our Modern Fans are **MALES AND FEMALES AGED 16–24 YEARS OLD**, who engage with football content every single day.

This time, we have also focused on **CHINA, USA, and BRAZIL** in addition to the UK, to give us some different perspectives from around the global Modern Fan community.



The Modern
Football Fan

TV SCREENS and kickabouts

We first wanted to see what the main interactions with football were. Of the 18 behaviours we tested, female fans ranked higher (1-8% more) in 10 of those fields, including watching football on TV and following results as they come in. Only gaming and playing the game in real life with friends / a team skewed towards male Modern Fans:



TV SCREENS AND KICKABOUTS

1. 60% Watched football live on TV
2. 58% Followed results on TV, news and internet
3. 58% Talked to friends/family about football
4. 54% Watched highlights on my mobile device
5. 50% Watched highlights/clips on TV
6. 48% Watched other football related video clips online
7. 48% Watched highlights on my laptop/home computer
8. 44% Read football transfer gossip online
9. 34% Watched a game via a paid for/subscription based live stream
10. 32% Watched a game online via an unofficial live stream

The Modern Football Fan

There were also some interesting nuances from country to country. UK fans definitely lead the way for talking about the game with friends, checking match results, and following transfer gossip. Modern Fans in Brazil are more likely to play football outside with friends and via their games console, whereas fans in China were the most keen on watching match clips on their mobile devices and laptops.

Preferred platforms for consuming football content amongst all Modern Fans globally:

- 35% TV (live)
- 24% YouTube
- 18% TV (on demand)
- 15% Football specific websites
- 14% Facebook
- 13% Instagram
- 12% Twitter

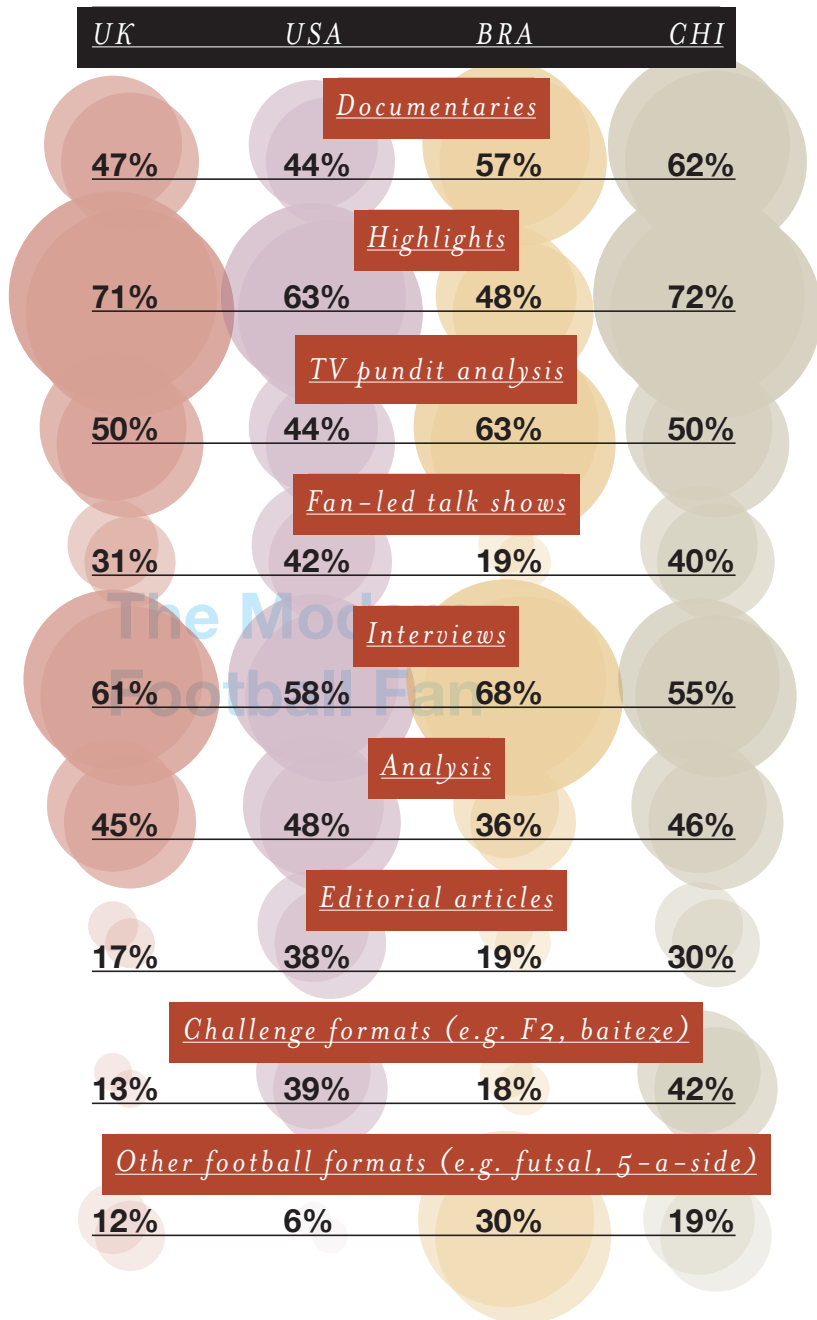


SUBSCRIPTIONS and beyond the 90 minutes

When it comes to paying to view football, Brazilian fans are most likely to watch games via a TV channel subscription (79%), and China-based fans are more likely to pay via streaming (either monthly or per game). American fans were the most accustomed to using a one-off pay-per-view format for a game (68%) and were also the most interested in any future formats that allows them to pay just for the last 20 mins of a game (78%).

- 70% TV channel (Monthly subscription)
- 59% Streaming platform (Monthly subscription)
- 54% TV channel (One-off payment for a game)
- 48% Streaming platform (One-off payment for a game)

In terms of TV content formats outside the 90 mins, the top three options for Modern Fans were highlights, interviews, and documentaries. Female fans ranked high for contemporary, deeper formats such as documentaries, interviews, and fan led talk shows, while male fans biased slightly towards TV punditry and post-game analysis in general.



the new TRUST BAROMETER

THE NEW TRUST BAROMETER

Respondents were asked to name their Top 5 most trusted sources of football news:



When it comes to football related news, the landscape has changed drastically, with Modern Fans trusting social media accounts (whether players', journalists', or just football themed) more than traditional coverage in newspapers.

Trust in TV news outlets remains strong,

as does faith in official club sources and specialist football websites, but it is clear that social media is no longer just offering accessibility and speed when it comes to football news.

This tended to be a global trend, with different markets following largely

similar patterns. However, US-based fans had noticeably lower trust in TV news, while Chinese fans were more likely to prefer official club and player communications over new media influencers and supporters groups.

MEMES, GIFS, AND private chat

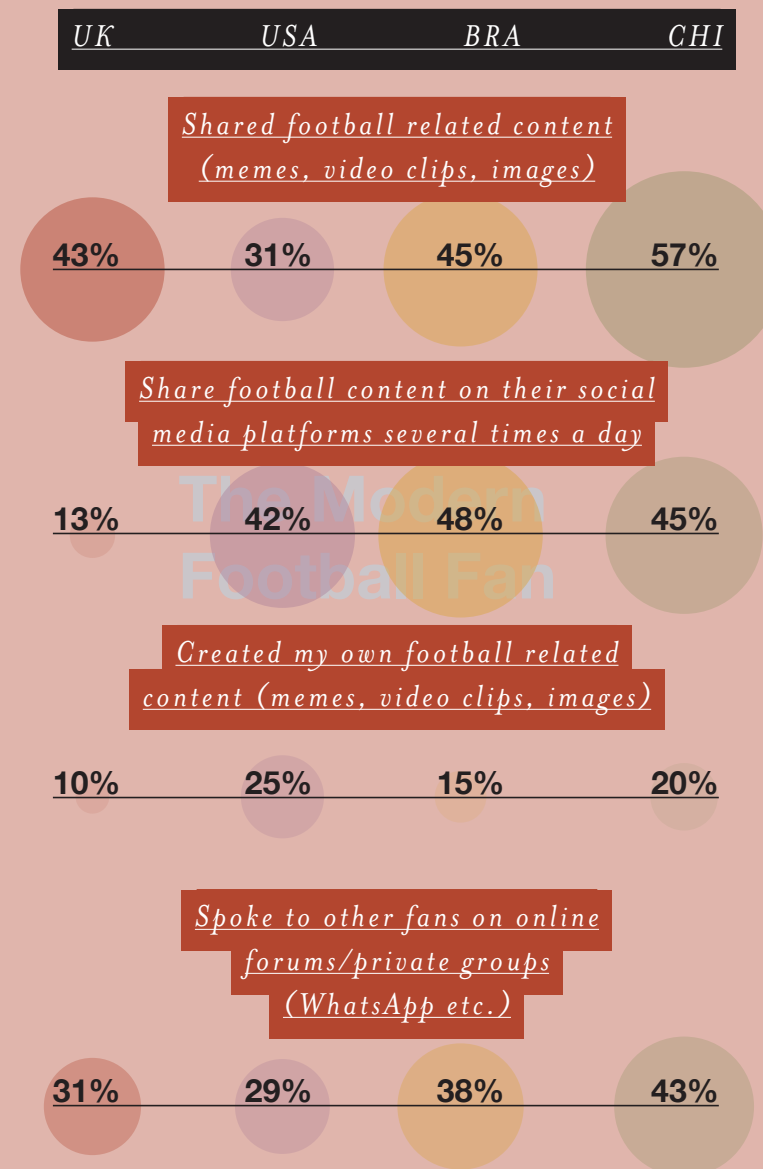
In the previous Modern Fan Report, we highlighted the importance of meme culture amongst fans, and this trend continues to grow globally, with funny videos and memes now overtaking game highlights on social media (60% v 59%). Interviews, GIFS, and stats made up the rest of the top five content forms.

Though all four markets were keen to share football-related content,

Brazilian and Chinese fans were the most likely to do this publicly via their social media profiles.

When it comes to the source of this content, club accounts, football media, and fan club accounts were more popular than those of first team players, backing up the view that fans have a more voyeuristic relationship with their favourite player's accounts.

This becomes especially apparent when you compare it to the sharing of football Influencers' content (41% influencers v 38% players).



REASONS to be CHEERFUL

Roughly a quarter of our Modern Fans played football regularly as part of an amateur team (26% of male v 20% of female fans) while 45% enjoy a good kickabout. With the easy seduction of FIFA, what actually gets them out onto the grass?

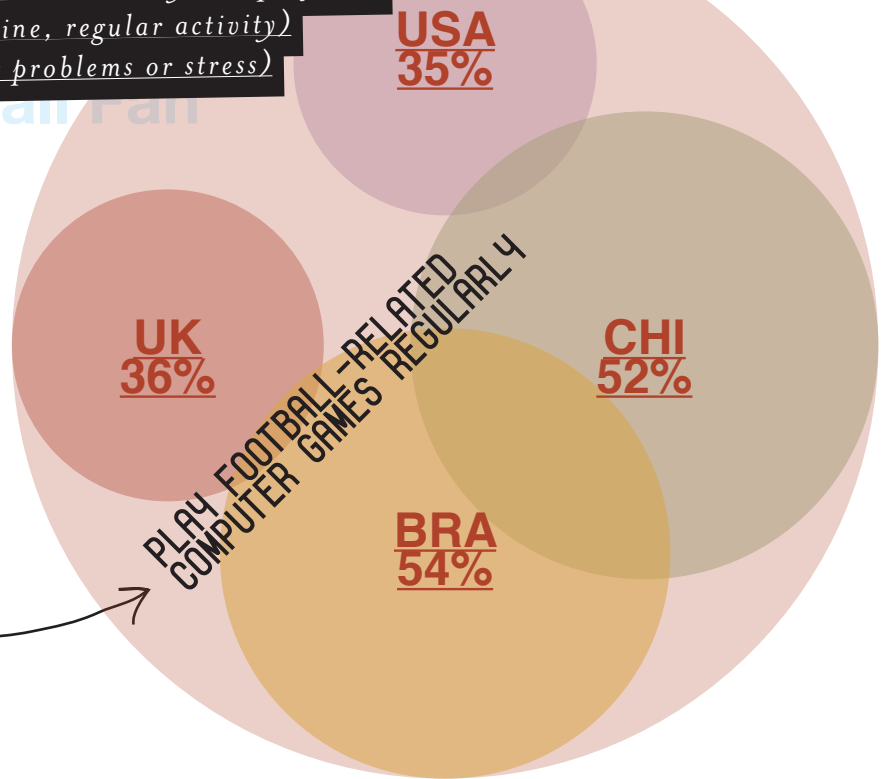
"The continuous development from the gaming industry and the leading publishers is fast paced. And, combined with the advances in cloud gaming capabilities, the increase on overall connectivity, the progressive reduction of streaming latency mixed with the advances on streaming concurrence management, things are extremely exciting. The end dream of having one user/fan creating a virtual scenario/journey over a real event in real time, independently of their location, device or purchasing power is a realistic one for sure and I believe will be part of a wider ecosystem, where sharing content and sharing the individual virtual over real experience and amplifying it to any community of friends or equal interested users will be a seamless and integrated experience."

- Luis Vicente, Chief Digital Transformation & Innovation Officer, FIFA

- 72% Fitness (for health and wellness)
- 61% Competitiveness (to test myself, to try and win)
- 55% Community/being part of a team (to be part of a group)
- 52% Identity (it's part of who I am and how I identify myself)
- 52% Expression (it's how I exhibit creativity and perform)
- 49% Ritual (it's part of a routine, regular activity)
- 36% Escapism (to forget about problems or stress)
- 3% Other

Though fitness was the primary driver across all four markets, there were also interesting local nuances. In China, competitiveness and ritual / routine were key motivators, in contrast to the UK, where young fans were far more likely to reference community and feeling part of a team. In Brazil and the USA, identity was a strong driver.

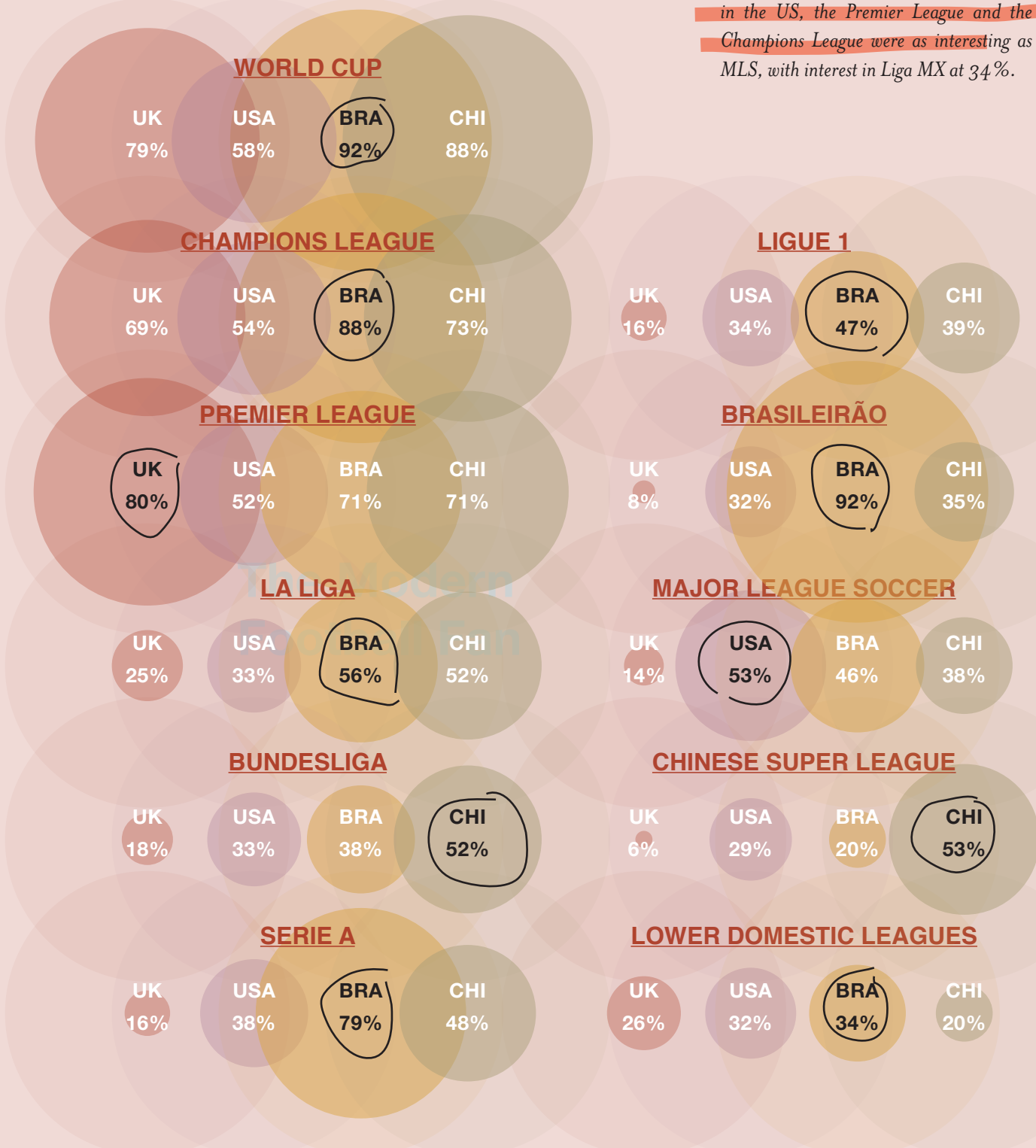
... and when it's raining



League Watch

When it comes to specific leagues and tournaments, Modern Fans in Brazil are the most 'worldly' with their tastes, taking a strong interest in most major leagues around the world. They are also more likely to follow lower domestic leagues as well.

Conversely, young fans in the UK had the large majority of their attention focused on the Premier League. For young fans in the US, the Premier League and the Champions League were as interesting as MLS, with interest in Liga MX at 34%.



The Modern Football Fan

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- p52 — MORAL MAJORITY
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- p81 — ENTREPLAYERS

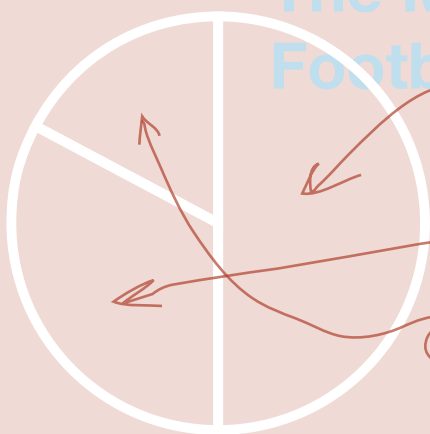
THE

WITH AN EVER BROADENING ARRAY OF TOUCHPOINTS TO PASSIVELY KEEP UP TO DATE WITH, YOUNG MODERN FANS MAKE A KEEN DISTINCTION BETWEEN THE NOTION OF CONSUMING OR FOLLOWING FOOTBALL CONTENT JUST TO SIMPLY 'KEEP UP' AND THE ACTIVE MATCH DAY EXPERIENCE: WATCHING THEIR TEAM LIVE ON SCREEN.

THE EPL HAS SET A BROADCAST STANDARD OVER THE YEARS WITH ITS HIGH QUALITY PITCHSIDE MICS AND VIVID COLOURS TO CREATE A TANTALISING VIEWING EXPERIENCE THAT HAS SET A HIGH BAR FOR MODERN FANS. COUPLED WITH THE VIRTUAL INFLUENCE OF FIFA'S HUGELY REALISTIC GAMEPLAY, THIS HAS SET THE CONDITIONS FOR MODERN FANS THAT DEMAND A FULLY IMMERSIVE VIEWING EXPERIENCE.

12TH

The Modern
Football Fan



50% of Modern Fans want more immersion while watching live football v 33% for increased interactivity and 17% for more sociability.

MAN

THE 12TH MAN

Case Study
Bringing the '12th man effect' to life at England v Croatia behind closed doors—you could hear every tackle.

Case Study
Arsenal, Manchester City, and Liverpool are hooking up with Intel to allow their fans to relive matches via a pioneering immersive experience. Intel True View features include 'be the player' capabilities, a laser wall, and multi-angle views of play.

Case Study
New technologies in other sports will allow an even greater depth of immersion that our Modern Fans will soon come to expect such as Intel's 'True View' action replays in NFL that offer a new, virtual 'on pitch' perspective.

Case Study
Live audiences watched Atlanta Falcons wide receiver Calvin Ridley sprint down FedExField for a 40-yard touchdown against the Washington Redskins. Minutes later, 2 Intel engineers released a fully immersive, 360-degree replay. This "True View" replay system is part of the chipmaker's plans to transform the humble instant replay into a multibillion-dollar VR industry.

Case Study
Bayern Munich visualising the sound of fan chants.

Case Study
The broadcast colours of the Premier League are a key reason for its popularity.



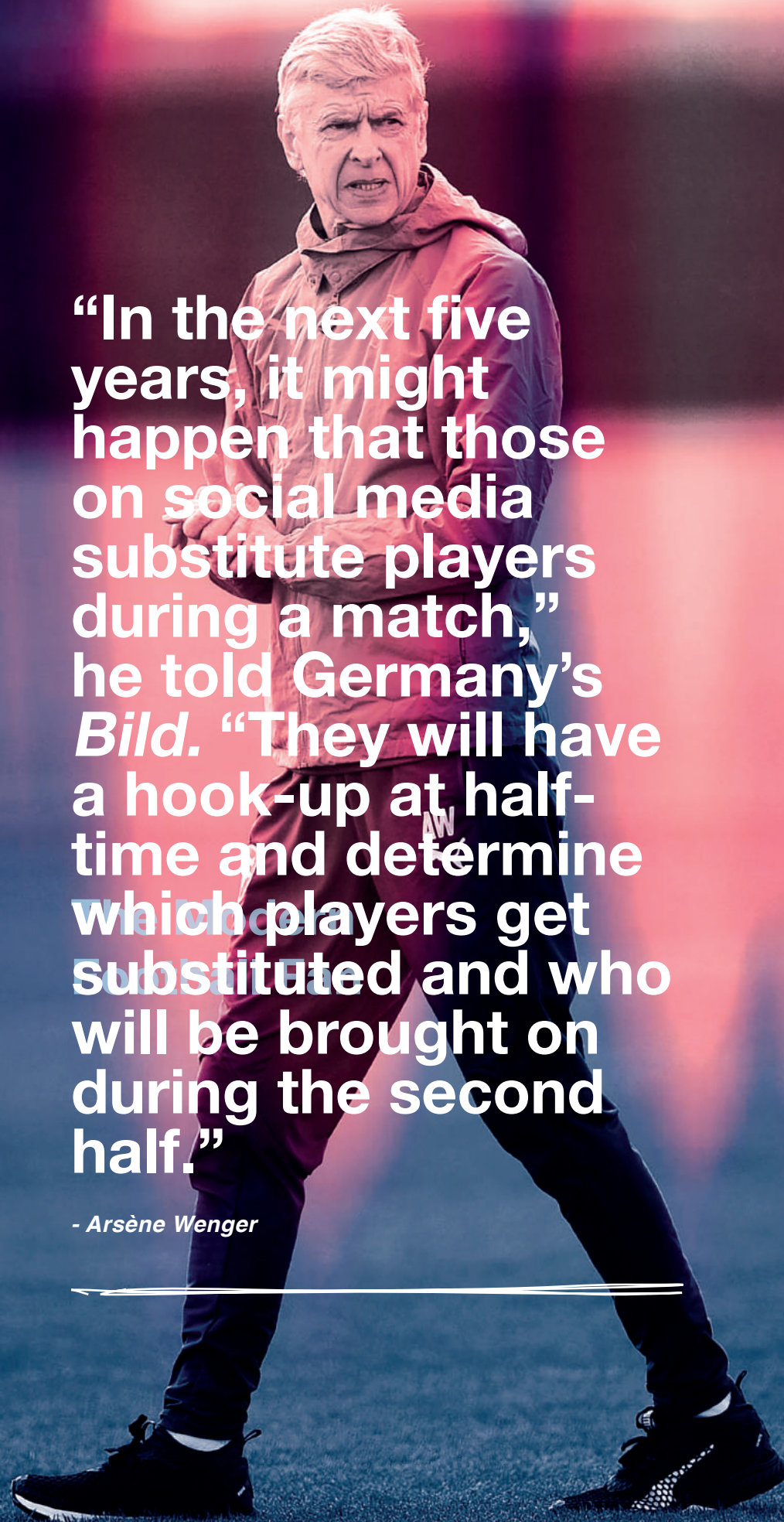
THE 12TH MAN

"One could expect changes in the social video space and how second screens become more interactive and personalised to the user. Live streaming on Facebook and Twitter was just the beginning. The next step would be adding services like receiving product offers, betting, games, polls, etc. in real time adjusted to in-game moments and personal preferences. Improvements in data and technology will allow further customisation."

- Rudolf Vidal, President Americas, Bayern Munich

"In the next five years, it might happen that those on social media substitute players during a match," he told Germany's *Bild*. "They will have a hook-up at half-time and determine which players get substituted and who will be brought on during the second half."

- Arsène Wenger



COPA PREDICTION: AS THESE YOUNG MODERN FANS DEMAND A MORE IMMERSIVE VIEWING EXPERIENCE, THIS WILL NECESSITATE A SHIFT FROM AN IMMERSIVE VIEWING EXPERIENCE TO AN INTERACTIVE ONE. AS WE'VE STARTED TO SEE WITH OUR OWN FAN CREATORS DICTATING BERNARDO SILVA'S CELEBRATION, WE EXPECT IT WON'T BE LONG BEFORE FANS HAVE THE POWER TO DICTATE PLAYER CELEBRATIONS OR DECIDE ON SUBSTITUTIONS, AS NEW WAYS TO INFLUENCE AND INTERACT DIRECTLY WITH THE ACTION ON THE PITCH EMERGE.

61% of Modern Fans are interested in a platform/channel that allows you to pay for a section of a live game (e.g. the last 20 mins) at a reduced rate. This was even higher amongst US fans (78%).

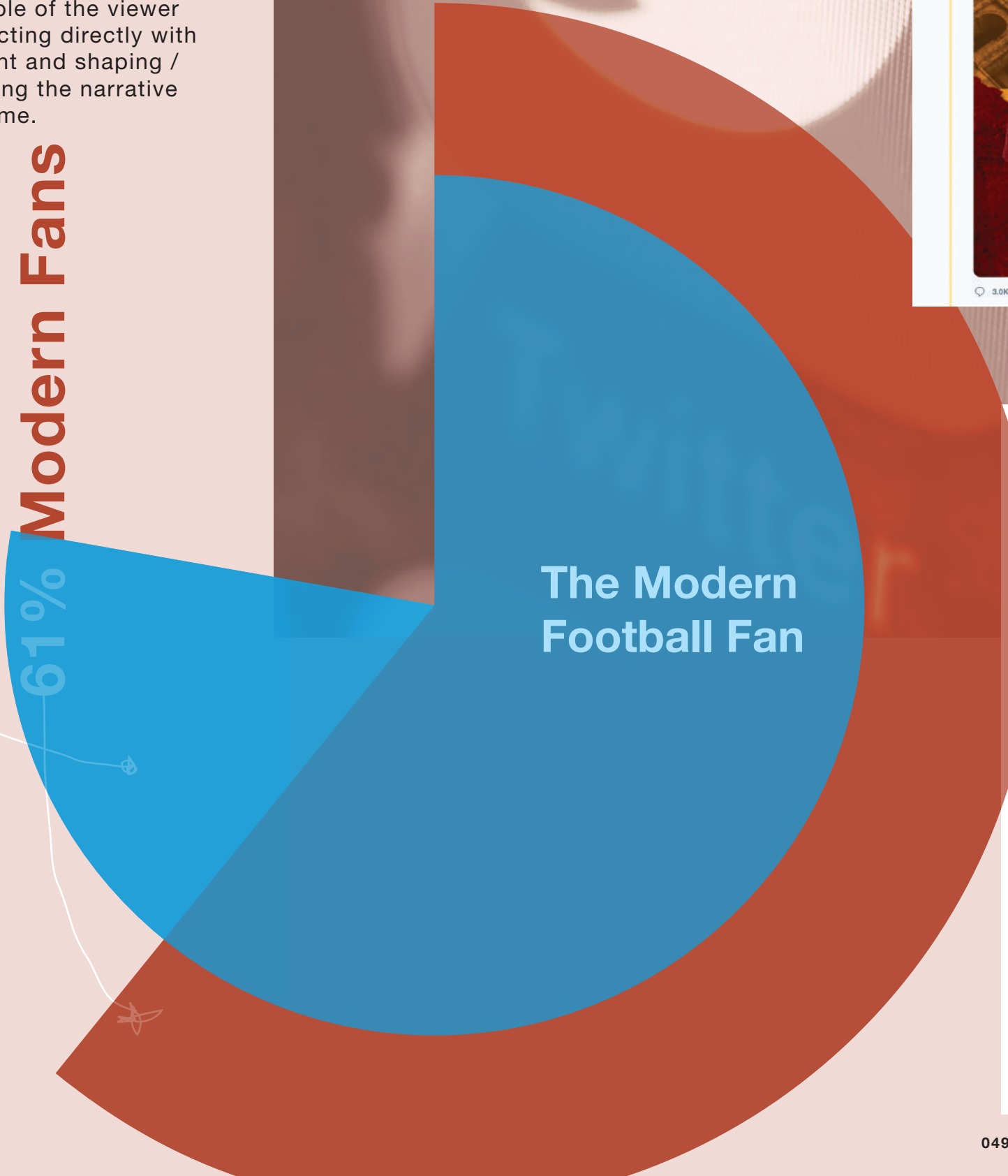
“With Amazon Prime winning a percentage of the Premier League rights from 2019/20 season, I can imagine they’ll integrate their full ecosystem into the experience, i.e. using Alexa to interact with the broadcast, buying products relating to the clubs playing live, and then new services/products (location based/voice tech etc.) which could create an even more personalised offer which would make for a very powerful subscription model.”
- Adam Field, Global Sports Marketing, Chelsea Football Club

Greater control of when and what part of the live game they access is also key to Modern Fans:

Twitter powered, fan-controlled sideline camera in MLS LA Rivalry.

Charlie Brooker’s **Bandersnatch** is an example of the viewer interacting directly with content and shaping / deciding the narrative outcome.

78% US fans
61% Modern Fans



BREAKING BANTS

Twitter is still the Premier League when it comes to passionate football debate amongst fans and industry commentators alike. Many fans have a completely different selection of friends on Twitter than on other platforms (or real life), with an emphasis on club news, transfer gossip, video clips, and heated analysis of games.

However, these passionate conversations are now regularly spiralling out of control as a minority of fans use abusive language and memes to court attention and gain a few quick follows.

Fans are observing how quickly, and often, the online conversation devolves into racist, sexist, and homophobic abuse, and this increased toxicity is leading

some fans to disengage with the conversation and reflect on their passion for the game in general.

Instances of aggressive behaviour and racism were most visible to fans in Brazil (61% and 53%), and American fans noticed the highest levels of homophobia, sexism, and xenophobia (35%, 31%, 31%). Conversely, just over a quarter of Modern Fans in the UK had not seen any such behaviour in relation to football.

This moral dilemma is not reserved purely for fans, with various incidences of official club Twitter accounts being taken to task for disrespectful posts and emboldening the trolls. Elsewhere, certain media outlets are using the same lust for

extreme views as easy clickbait, while at the same time shirking responsibility for the validation they give to this growing trend.

In the wake of high profile racist incidents, and a general rise in right-wing attitudes across wider culture, there is now a more sinister feel for fans as they join the dots between 'online banter' and real-life incidents of abuse.

The question, now, is *can a genuine moral backlash of both fans and the 'influencers' they follow inoculate this growing toxicity?* Or will fans take their football debates and banter elsewhere (as we called out in last year's Dark Social Circles chapter) leaving a very public vacuum on platforms such as Twitter?

53% AGGRESSIVE / THREATENING BEHAVIOUR

42% RACISM

These fans had witnessed or been affected when following other football fans on social media by:

28% HOMOPHOBIA

26% SEXISM

25% XENOPHOBIA

20% NONE OF THE ABOVE

moral majority

All football fans are united by a strong sense of passion, but for our young, diverse, mostly liberal-minded Modern Fans there is a very clear line between passionate, partisan support and abuse.

As previously mentioned, young Modern Fans are aware of a level of hateful discourse online which they often take proactive steps to avoid, but they want to see decisive action

to stop this creep into physical spaces.

This is made increasingly hard by the prevalent 'season ticket holder' culture within the football ground. Dated and unacceptable views circulate (and are often passed down to children) within a secure and repetitive 'filter bubble'... with limited interactions with the broader fanbase outside of the stadium.

Clubs like Chelsea, who sent fans to visit Auschwitz as a form of reform based punishment, or NYCFC, who offer guidelines on respectful support before games, have offered some innovative solutions to the problem.

However, fans still demand greater accountability from clubs, leagues, and football bodies to take a zero tolerance approach towards racism.

COPA90 video: Why Do British Asians Never Make it Pro?

"Don't think it would be too harsh to throw Millwall out of the FA Cup off the back of those racist chants. If your theory is it's just 'one or two/ a small group of idiots' to blame then you're wrong. Why punish everyone because of them? Because it needs stamping out, that's why."

- David Preece, @davidprece12 on Twitter

"I've been to lots of NYCFC games, and before every one they play PSAs about being respectful, treating other people well and just taking pride in how you conduct yourself—I think they do a good job."

- Fan, NYC

Though fans felt heavily responsible, they still believe that the bulk of the responsibility to instigate positive change is at global and domestic governing body level to:

- 53% Global Bodies (FIFA etc.)
- 47% Domestic League Authorities
- 39% Football Fans
- 36% Players
- 31% Official Club Supporters Groups
- 31% Non-Club Specific Supporter Groups
- 30% Sports Brands (Nike etc.)
- 24% Football Clubs

"It needs to be a pan-club approach to tackle these problems. An incident can't be racist for a Chelsea fan but not for a Spurs fan... there needs to be a hard rule across the board for all clubs."

- Fan, LDN

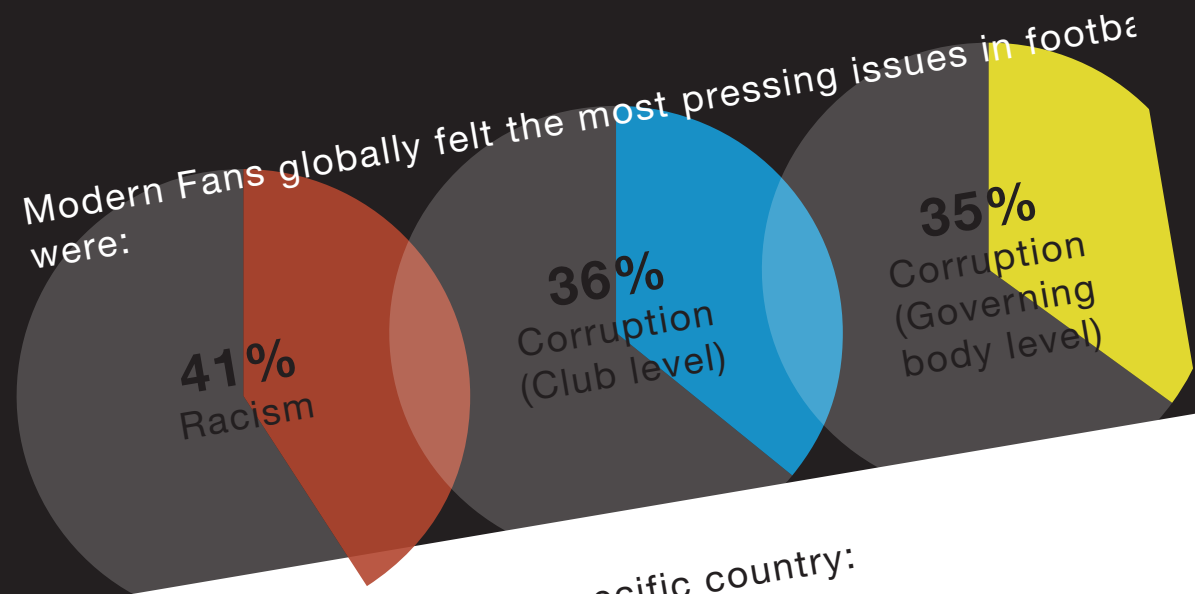
The Modern Football Fan

"I loved what Ancelotti said when Koulibaly got abuse... If you racially abuse our players, then we stop the match. Even if they get a fine, it's worth it as racist fans will soon shut up."

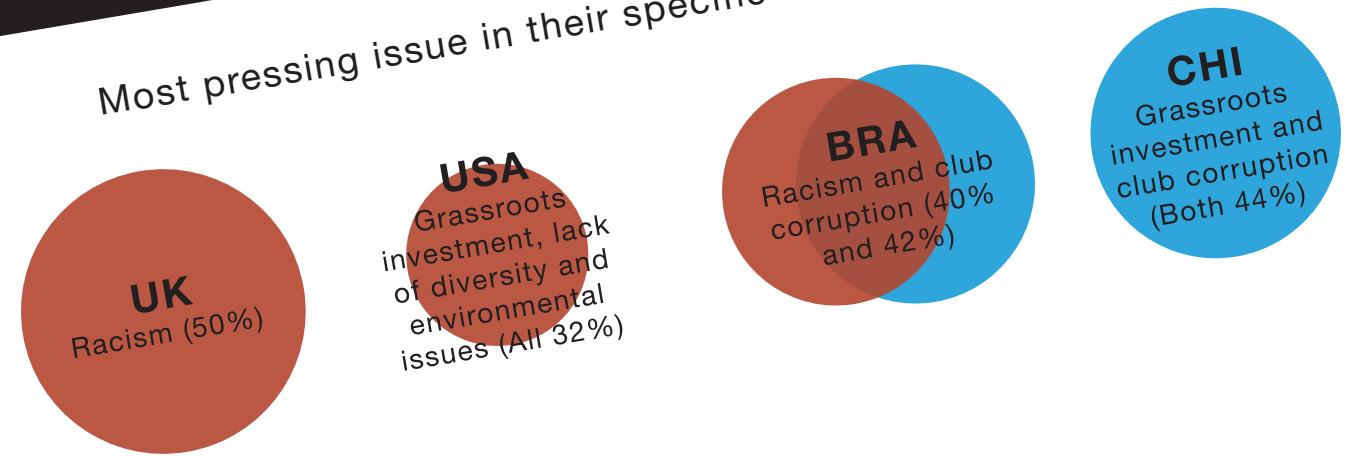
- Fan, LDN

"The rise of hate-crime in society [is] being reflected in football as well, especially on social media. We are a reporting bureau, so you can report any form of discrimination to us. We're seeing mid-season reports of an increase of 59 per cent. While part of that is down to people having increased confidence about reporting because they think something is going to be done, you couldn't put that 59 per cent down to only that."

- Robin Wood, CEO @ Kick It Out *



Most pressing issue in their specific country:



In conversations with these Modern Fans, huge praise was heaped on Raheem Sterling's measured response to the racist abuse he received, not only calling it out, but connecting it to the wider systemic issue of racism within the mainstream media.

In all ways, racism feels anachronistic to our Modern Fans. Not only overt racism but the

subtle, implicit, structural forms of racism that have belied accepted football culture for years.

Modern fans are able to show bipartisan support to clubs and fan groups that are taking an active role to address issues of race and improve the conditions to create a more diverse, open-minded society through football.

From commentary to scouting policies, these young Modern Fans want to 'decolonise' football and are happy sacrificing some of the passion and intensity in the game if it means confronting and improving the wider social conditions that give rise to hatred.

moB

Fans from both the US and UK were also able to connect Raheem's stance to that of Colin Kaepernick's and support Nike's backing of the athlete — showing that brands have an equal role to play in combatting this problem.

In late 2018, UK charity Kick It Out reported a rise in discriminatory abuse of 11% from 2016/17 to 2017/18, with reports of racism up 22%.

The Modern Football Fan

"It's not just fans. Pundits are always describing black players' pace and strength and never their intellect. It's reducing black players to these basic clichés. Young fans are noticing that sort of stuff."
- Fan, LDN

"You can see a definite connection with some of the racism you hear about in the stands and what's been happening in politics."
- Fan, NYC

"Arsenal Fan TV gets a lot of shit, but it's one of the few football shows that I think give a true representation of the diversity of the Arsenal fan base."
- Fan, LDN

"I'm proud of my generation, we place a lot of importance on ethics; my friends, basically everyone I know, has zero tolerance for racism and homophobia."
- Fan, NYC



The People's Game

During the World Cup, Gareth Southgate remarked to journalists that he and his England team had a responsibility to heal some of the divisions that had emerged in the wake of wider socio-political upheavals. This seemingly flies in the face of the mainstream narrative often levelled at modern football and footballers, both often held up as problematic examples of the decline in local identities and communities.

Modern Fans we spoke to feel a similar sense of responsibility as Gareth Southgate himself. They too believe in the socially unifying power of football and actively use football to improve cohesion in their own communities.

We heard examples of fans getting involved with and running programmes on 'healthy living' on behalf of Cityzens (NYCFC) or working in schools across London to educate and empower young people through organisations like Football Beyond Borders.

Only 5% of young Modern Fans felt unaffected by current issues within the game, with most having more dramatic responses:

41% want to spread awareness

34% want to actively instigate change

23% more likely to follow other sports

"There's lots of inequality in South East London, it's a 'broken community', but as a Dulwich Hamlet fan I think the club is bringing people together in a really beautiful way."

- Fan, LDN

"I like things that close the gap between fans and the team, where it's less us looking up at them and more about us pulling together, like with the Cityzens projects."

- Fan, NYC

The Modern Football Fan

"We need to shock the system to affect genuine change, but do it in an authentic way."

- Fan, LDN

"I went to a City Lights session a few years back—it was great to have people coming together, especially on a Friday night when people could have been doing other less positive stuff, but instead everyone was together playing football."

- Fan, NYC

"We're a team, with our diversity and our youth, that represent modern England. In England, we have spent a bit of time being a bit lost as to what our modern identity is. I think as a team we represent that modern identity and hopefully people can connect with us."

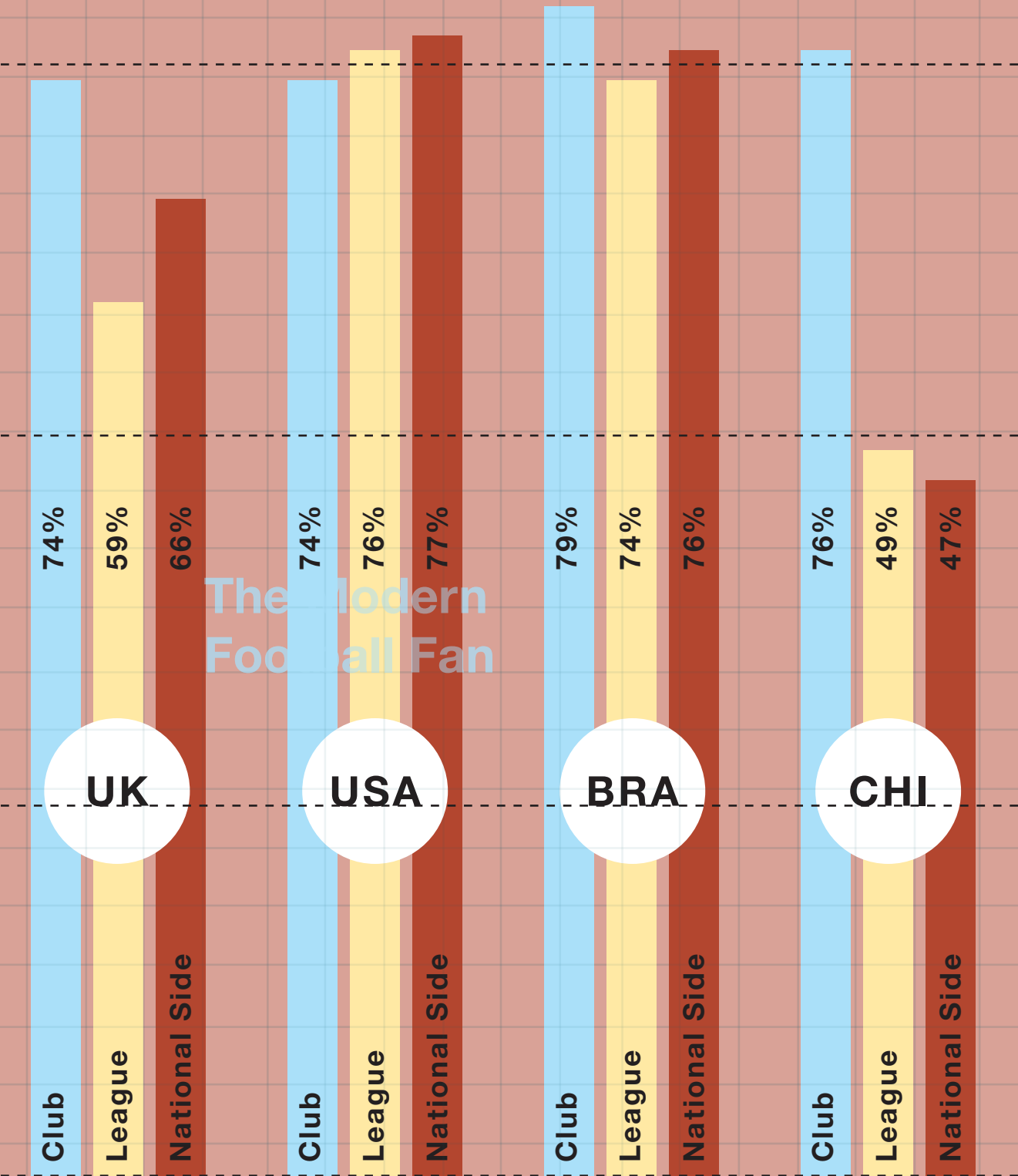
- Gareth Southgate

USA and Brazil-based Modern Fans were the most consistently optimistic when it came to the future of their club, league, and national team:

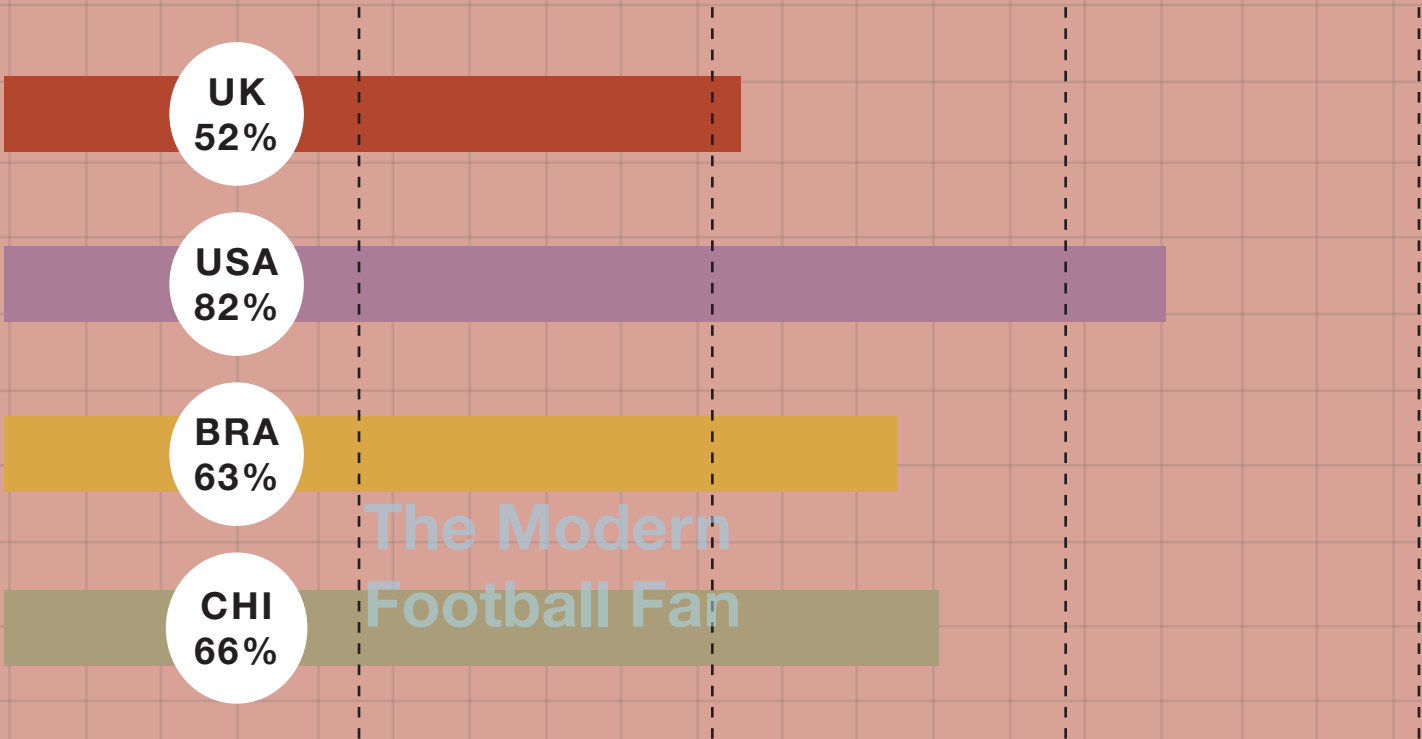
To a lesser degree, both this year and last, fans told us of how the “social experiment” that is football allowed them to escape their ‘echo chambers’ and interact with people from other walks of life, if only for 90 mins.

And this is even being reflected back at the upper echelons of the game with a spokesperson from FIFA who, when speaking at a G20 forum, described football as a ‘tool’ to solve global issues.

67% of our modern fans felt that players and football clubs should be more outspoken about social and / or political issues. When split by country:



The Modern Football Fan



Football has always been a socially unifying sport, but in a time of ever more diverse and fracturing identities and social unrest, the game’s ability to bring seemingly disparate people together has taken on a more powerful meaning for Modern Fans.

A melting pot for society’s broader issues and tensions, football must start actively influencing these issues in society by way of innovation and example.



Case Study

[EPL — this is everyone's game]

C.D Leganes — 3rd kit supporting the fight against gender violence.

Serie A — Players donning make-up to rally against domestic violence.

MORE THAN RAINBOW LACES

Female fans were more concerned than their male counterparts when it came to gender pay gap, sexism, and homophobia

MORE THAN RAINBOW LACES

As LGBT and other marginalised communities hold an ever more important and necessary voice in the wider societal conversation, there's an ever-growing desire from young Modern Fans to see this reflected in football.

LGBT football teams, fan groups, and fan networks like Stonewall FC, Palace, and Proud and Pride in Football are examples of fan-led organisations that have carved out their own safe spaces both virtual and physical to connect with like-minded fans.

Along with the greater visibility of LGBT fan groups, broader initiatives like Rainbow Laces , and an increase in female voices in the game, we're seeing fans reflect on the very notions of gender associated with football.

Modern Fans are beginning to question how traditional ideas of masculinity are hardwired into the culture and ask whether they're fit for purpose for them, as Modern Fans in 2019.

The popularity of players like Héctor Bellerín amongst Modern Fans shows the appetite for players to have the courage to step out of the traditional, masculine footballer archetype.

The real question is not *when* will we see a top level player in the men's game coming out, but at what point will such an event be demanded and openly welcomed by the Modern Fan mindset.

MORE THAN RAINBOW LACES



THE NEW ULTRAS

The Modern
Football Fan

"The best atmosphere I've experienced was when Poland played Russia, but despite that, it was sad to see so much hatred; football should be about unity, not hatred - it's much better to come together as fans."

- Fan, NYC

"Part of the reason I wanted to get involved in a fan chapter was to help bring soccer to more people that weren't aware of it."

- Fan, NYC

"Cooking and soccer are my two main passions in life, so I like to combine them by coordinating the tailgates our fan group hosts before NYCFC games."

- Fan, NYC

"Many Ultras' ideas borrowed by MLS fans have improved the league's culture. No league does tifos like MLS, for instance. MLS' 'safe standing' sections recall the way Ultras used to stand and sway as one living, breathing entity on European terraces decades ago. Orlando City even have safe pyrotechnics zones in their stadium."

- The Guardian

"When we travelled away to play against the Portland Timbers, we had home fans come up to us before the game thanking us for making the journey and recommending beers to try and places to eat - it was amazing!"

- Fan, NYC

With the flattening of coverage across leagues, divisions, and football territories thanks to online platforms, we're seeing an interesting cross-pollination of fan cultures between the established ones of Europe and those rapidly developing places such as the US.

Unencumbered by both the stigmas and cultural baggage surrounding the game in England and Europe, young soccer fans have a blank canvas on which to create their own unique fan traditions and behaviours.

Whether having a drink with home fans on away days or putting aside local rivalries in solidarity to support their local women's team, as we heard in the research from

NYCFC and New York Red Bulls, Modern Fans in the US embrace the broader concept of fraternity amongst diehard supporters.

In doing so, they are reconfiguring the notion of what it means to be an 'Ultra', and seizing the opportunity to build their own unique cultures from the ground up. They're embracing and adopting, as well as rejecting, the global and European aspects that they want for their clubs, fan groups, and leagues.

COPA prediction: We predict that this interchange will extend beyond the EU and US and become a more fluid, plural interchange as different leagues and fans cultures are brought into focus by digital platforms.

The Modern
Football Fan

Case Study

LAFC have had great success by targeting disenfranchised Korean and Mexican communities from the start.

"[LAFC are the] team of the future, a team that is new and next and forward in everything that we're doing."
- Tom Penn, Club President (via FourFourTwo)

Zuqiu's Coming Home

China's relationship with football, and arguably the global economic order at large, can often be seen as that of a 'financier'.

Certainly, for the English and European clubs and players, this has been focused on value extraction from China through sponsorship, pre-season tours, or more recently with both players and managers being recruited to the Chinese Super League for huge pay cheques.

This is not to say this influence is wholly negative. The Fosun investment in Wolves, for example, has helped breathe new life into a club and community.

However, we seldom hear how these links with the global game, as well as the increasing presence of football and football fan culture more generally, is panning out in China itself. It is just the same stories about wealthy owners and mercenary foreign players looking for one last payday.

But there are a whole host of new fans at a domestic level in China, with average attendances in the Chinese Super League having risen by more than 60% to nearly 25,000 between 2010–2017... that's more people now attending an average CSL game than top-flight matches in the French and Dutch leagues.

Young Chinese fans are highly optimistic about the future of their club, but under index against other nations when it comes to optimism relating to their league and national team.



"We have research that indicates China has 551m regular football fans and 352m 'occasion followers'. UEFA has a clear long-term strategy for UCL in China, underpinned by producing tailored content and campaigns on Chinese social platforms (WeChat, Weibo, and others) and a series of on-the-ground events that talk to Chinese audiences in a way that is relevant."

With 37,000 tickets sold according to FIFA, and Chinese state media claiming a total of 60,000 in Russia, it appears there are more Chinese fans at the tournament than English fans.

"People in the West Midlands like the Chinese... [they're] coming in and investing in a neglected area that's been overlooked for years... They are doing a lot more for us than the British government."

"Faye Nixon [Derby County's] head of global engagement, [says] that the team is planning to win over Chinese audiences in Hefei through a diverse range of localised content not necessarily related to soccer, such as fitness videos and an interactive game show-style esports competition. We're not a big brand in football currently; we're not a Real Madrid or a Manchester United," she says. "We don't have those key players within our team that excite the global market, [so] we've got to do things differently."

- Sixth Tone

- The FT

- The FT

"Regarding fans and fan engagement with the game, I believe China is already ahead in terms of digital engagement, more than amplified by a natural UGC approach from Chinese fans and by the scale and width of servicing provided by the main Chinese digital platforms. Concepts that are still embryonic in football in other parts of the world, such as real-time fan gamification and rewarding, real-time fan experience to personalisation, and full openness to user generated content by local sports rights holders, are already well and widely used in the Chinese football landscape. I believe this will be very influential for other markets including Europe."

- Luis Vicente, Chief Digital Transformation & Innovation Officer, FIFA

Player brands are of particular importance to a Chinese audience, for who a Ronaldo, Messi, or Mbappé was their first introduction to the game. 32% of young Chinese fans feel more affinity to star players than clubs (compared to the average of 23% across the other markets we researched).

Language and digital politics can mean that Chinese fans don't always have the same level of access to football news and content, but as local resources and apps like HuPu, Dongqiudi, and Sike (Score Sports) grow, and with an increasing number of official player and club Weibo accounts, this will be less of an issue in future.

Once introduced, there's a hunger from passionate Chinese fans to consume and educate themselves in all aspects of the game, team, and players—with many young Modern Fans in China quickly adopting and creating their own bond with niche, or lesser known, European teams.

Fans in China adopting and localising Ultra cultures, and applying them to the rapidly expanding fan bases of the CSL, is already giving rise to a new culture.

As Chinese fans grow in numbers and confidence, expect to see a greater interchange and presence of Chinese football fandom in the wider football world.

"In 2015, a small group of [Shanghai] Shenhua fans in Japan made obscene gestures to Beijing Guoan fans in their match against Urawa Reds. The reaction was predictably vitriolic. The supporters were called traitors and Japanese dogs by fans throughout China who were apoplectic with rage that their fellow countrymen would support a Japanese club against a Chinese one. This concept is absolutely contrary to mainstream Chinese thinking but, in some ways, it is refreshing to see some Chinese fans think more independently and be more like supporters elsewhere in the world."

- The Guardian

"Two-thirds (65%) of Chinese football fans intend to buy products from a football club's official sponsor, according to a new report."

- The Drum

"Linbo Yu, a 22-year-old student from the southern city of Guangzhou, runs a Derby fan page on Weibo that now has over 6,000 followers. He's looking forward to Derby's entry into China's social media space, adding that it will relieve the burden of managing the fan page as people can head to the official one instead. And while the team doesn't have the same name recognition as its more popular peers, he hopes that a growing number of Chinese soccer fans will be won over by Derby when it opens its Weibo account, pointing out that many Chinese sports enthusiasts prefer to support niche teams."

- SixthTone

Athletes from other sports often only have their mixed national identity referenced when they fail, not when they win; Ben Johnson (Canada / Jamaica), Mo Farah (Britain / Somalia), Yannick Noah (France / Cameroon).

Post-World Cup spat between Trevor Noah and France's US ambassador, Gérard Araud, on whether you can be French and African at the same time.

On the 1st of May 2018, 12,425 expatriate footballers were recorded in the 2,235 teams from the 142 leagues of 93 national associations surveyed. This figure includes first team squad members having been fielded in domestic league matches during the season. £

Against a backdrop of increasing nationalism, players such as Özil and Xhaka were on the receiving end of a media backlash last year, as their nationality and heritage became a talking point. Of the 736 players at last year's World Cup, 82 were not born in the country they were representing—so why is this such an issue?

The football old guard felt these facets to a player's character were a distraction, and disrespectful to the country they were representing.

However, young football fans are growing up with a different set of values relating to the players they idolise. The continued influx of foreign players in domestic leagues and increasingly multicultural urban environments has created an empathy and appreciation of a more fluid idea of national identity. This is before even considering the many fans who also proudly share their mixed heritage. The Boateng brothers on different sides of the pitch brings extra spice to a game, rather than undermines it.

Increasingly visible in the traditional European teams (such as Belgium, France, and England), this fluid national identity is even more acute in emerging football markets that have long enjoyed their national players' mixed heritage.

Fans in the US regularly talked of supporting their 'parents' team' in addition to the national side, with many in major cities inheriting their love of the game via their 1st or 2nd gen immigrant parents

DUALITY IS THE NEW NORMAL

62% of young Modern Fans support a second national team, with this trend most visible in the US and China:



DUALITY is THE NEW NORMAL

"Having a mixed heritage is pretty common nowadays. So why should players have to hide theirs? I think it should be celebrated."
- Fan, LDN

COPA PREDICTION: In the future, more will be made of players and their multifaceted heritage, as fans look to learn everything about what makes their idols unique.

"I don't like it when players switch national allegiances just to have a better chance of getting in the first XI. That's so fake."
- Fan, LDN

Israel Adesanya is a UFC fighter who represents Nigeria and New Zealand. "He is both Nigerian AND Kiwi... that's how he actually presents himself. I think that's really cool."
- Fan, LDN

When it comes to the players, these Modern Fans are actively interested in the cultural mix in their idol's heritage:

74% - Feel players should be able to openly express their mixed national identity

61% - Players with mixed national identities are particularly interesting and relevant to me

The response to this shift has been varied. Russia's only non-native player, Mário Fernandes, originates from Brazil but received Russian citizenship by presidential decree. Elsewhere, the secretary-general of the Swiss Football Association recently implied that the association may no longer be so supportive of building up young players who hold dual nationality because they could choose a foreign team over the Swiss one.

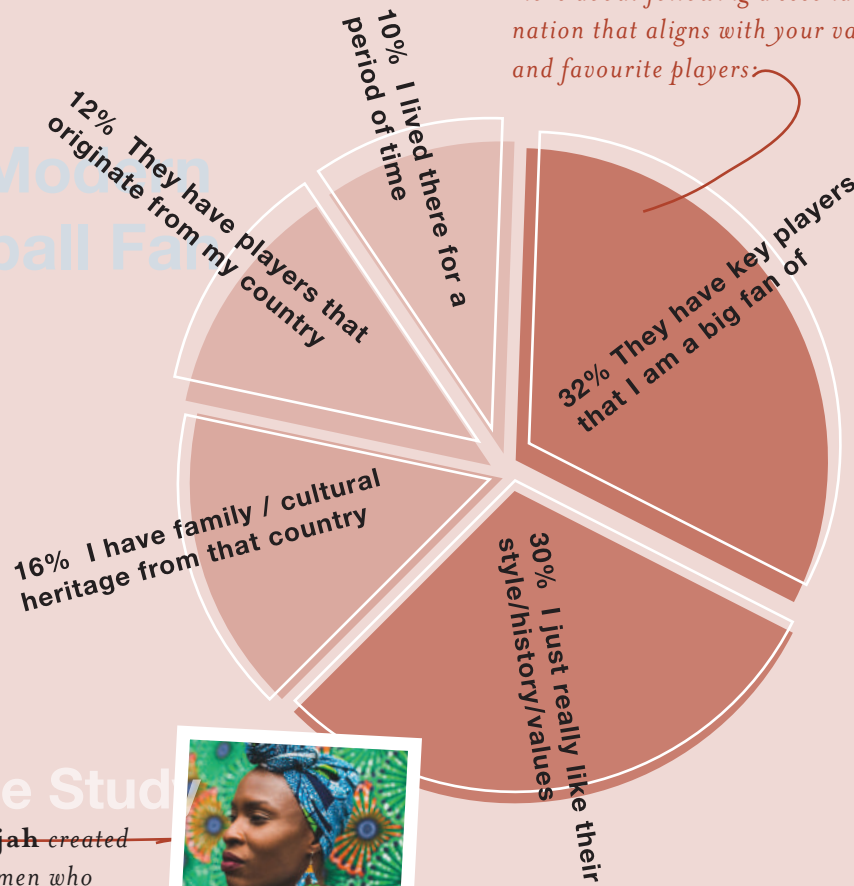
However, amongst young fans, the emerging attitudes and behaviours are clearly more engaged with players with multifaceted identities. They also actively embrace the opportunity to be part of more than one footballing identity themselves:

DUALITY IS THE NEW NORMAL

The traditionally Caribbean-infused UK Urban music scene has been transformed over the last five years as many credible British artists connect with their African heritage.

Artists such as Skepta have taken their sound on tour to countries like Nigeria and Ghana, while in return, African genres have become popular enough for Afro Bashment artists such as Kojo Funds and Not3s to appear in Top 10 hits. Similar trends have been seen in markets such as France, with the media increasingly referencing their mixed heritage in a positive light.

In the UK, second team support is primarily driven by family / cultural heritage (35%), though in non-European markets it is more about following a second nation that aligns with your values and favourite players:



Analogous Case Study

Photographer **Dámi Khadijah** created an art project using British women who have two national teams to get behind:



WHEN 2 TRIBES GO TO WAR

Recent examples of collaborations across different sporting industries have seen a variety of elite sports clubs look to increase their brand share via their fans' adjacent sporting passions. These mashups have had variable degrees of success with Modern Fans, with some being viewed as commercial money grabs rather than an authentic and relevant partnership.

Many of our Modern Fans felt the NFL collaborations with clubs such as Chelsea and Barcelona were 'inorganic' and forced. This was in contrast to a more positive response to the PSG x Jordan collaboration that crossed into the world of streetwear,

which was more firmly rooted in an authentic overlap of the surrounding sports cultures of both brands, not just the sports themselves.

Further conversation showed that many Modern Fans feel more demographically and attitudinally aligned to the exciting and diverse nature of the NBA and basketball culture than they do with the older, whiter, NFL brand.

Brands keen on making these inter-sport connections need to ensure they're telling the right stories or emphasising values of their sport, such as diversity or passion, to capture the attention of modern football fans.

COPA PREDICTION: If these mashups become more frequent, expect crossovers between specific clubs rather than macro level sports. Clubs who share similar history, fan values, and attitudes should be a starting point to make authentic links and connections across sporting lines; Golden State Warriors x St. Pauli collaboration anyone?

The Modern Football Fan

"I think we can learn a lot from the NBA and how it shapes broader culture across the globe. Streetwear and fashion is highly influenced by basketball, even now influencing football with the PSG X Jordan collaboration. The NBA has also led the way in terms of providing fans a deeper connection with players through platforms like The Players Tribune."

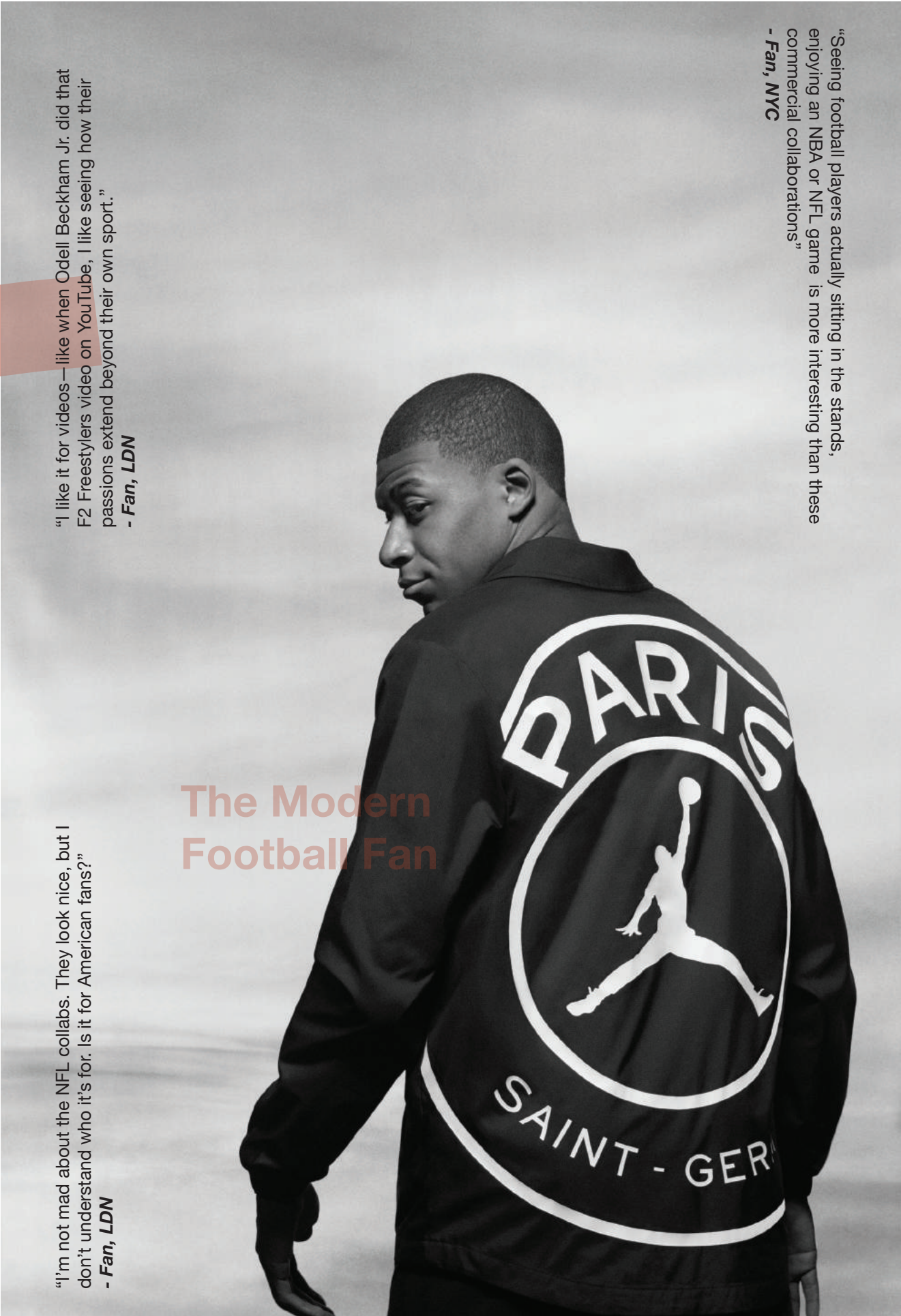
- Dan Holland, VP of Global Strategy & Comms – Dentsu Aegis

Case Study
Juventus teaming up with NBA team Brooklyn Nets for a special themed night devoted to the Serie A side

Case Study
Spurs NFL shirt



Case Study
Mundial x NY Knicks content



"I'm not mad about the NFL collabs. They look nice, but I don't understand who it's for. Is it for American fans?"

- Fan, LDN

"I like it for videos — like when Odell Beckham Jr. did that F2 Freestylers video on YouTube, I like seeing how their passions extend beyond their own sport."

- Fan, LDN

"Seeing football players actually sitting in the stands, enjoying an NBA or NFL game is more interesting than these commercial collaborations"

- Fan, NYC

The Modern Football Fan

"Streetwear has adopted terracewear and the football casual aesthetic that's led to the re-emergence of brands like Stone Island—but generally ignores the subcultures' muddled history. All in all, the relationship is complicated and steeped in cultural history."

- **High Snobiety**

"I like players that wear what they want. You hear the old pundits bashing them, but I think it's cool when they wear something flashy or don't conform to gender norms—I love that kind of personality."

- **Fan, NYC**

FASHION'S HOTTEST MUSE

Fashion search barometer 'Lyst' recently released a new report that showed women's searches for 'football-inspired fashion' had increased **520% since 2017**. General fashion searches including the same words have also **increased 370%**.

Though the World Cup definitely influenced these statistics, the size of the spike is symbolic of a wider, longer-term merging of the football and fashion cultures.

Disruptive brands and designers such as **Gosha Rubchinskiy**, KITH, and Palace have found great success in recent years by referencing European rather than US street and sports culture, with football paraphernalia, such as scarves and socks, a popular point of inspiration.

With the broader blurring of lines between luxury and streetwear, football's visual cues have

now also spread to a larger luxury fashion audience.

From the Kim Jones and Virgil Abloh capsule collections for Nike to Versace's striped shirt and scarf release, football style has reached the top end of fashion kudos. As with all fashion trends, these visual cues will likely trickle down to other brands and retailers, as it transfers from fashion fanatics, back to the mainstream.



"It was about taking certain pieces that you'd find in a JD Sports or Sports Direct and twisting them. I kept their essence but played with them."

- **Virgil Abloh** on the Nike football collection

WITH THE RUN OF PLAY

The Modern
Football Fan

All images featured in the fashion section
of MUNDIAL Magazine.

WITH THE RUN OF PLAY

It's about more
than the 90
minutes. About
more than the
ball pinging in
off the post or
holding your
defensive
line. It's about
the things you
wear, where you
wear them, and
how you wear
them. Across
all forms of
media, football
fashion is
permeating.
Football is
fashion.

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Photographer: Cheb Moha (prod. Naomi Accardi), Training Day

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The Modern
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Photographer: Elliott Wilcox, Barnett (a)

WITH THE RUN OF PLAY



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Football Fan

The Modern
Football Fan

WITH THE RUN OF PLAY

Photographer: Milly Cope, Playing Out

FROM CASUALS TO CATWALKS

FROM CASUALS TO CATWALKS

PREDICTION: PSG's collaborations with Balmain and Bape have given them a head start, though other clubs will soon follow into this space, selecting smaller collaborators for less 'logo focused', and interesting designs. But which clubs will be able to compete in this space?

Also, can 'Football Lux' in general go even further? Far removed from the humble 'Megastore' and terraces, we can envisage club specific pop up stores, consignment drops and Hypebeast style queuing around the corner (regardless of their club loyalties).

While the fashion industry has been utilising football references and fan culture in recent years, clubs are now seeing a rising social currency associated with football apparel, both old and new.

On the street and online, retailers selling vintage 80s and 90s shirts are seemingly popping up everywhere. Meanwhile, clubs like Bayern, Juventus, and Real Madrid, recognising the increasing fashion credentials of the football shirt, have worked to create slick, disruptive designs and interesting colourways that are celebrated in the football world and beyond for their sartorial flavour.

Innovative clubs are now starting to explore new ways to expand their product offerings beyond

traditional club shop fare. The recent crossover success of the PSG x Jordan range has opened up a new era of aspirational leisurewear.

Now clubs such as Juventus are creating in-house ranges that speak specifically to the fashion tastes of their audience, while others still attempt to innovate via collaboration with fashion designers and brands on one-off collections.

In this new landscape led by Modern Fans, who don't hold to the same strict 'one team' rules, clubs and designers can feel emboldened to create kits that will appeal not just to fans of the club, but football and fashion more generally.

More than 22% of people between the ages of 13–21 report making money online through vehicles like Etsy, Amazon, and other digital platforms for selling goods and services. ¥

16% of members of the same age group say they work for themselves. ¥

This trend has been present in the music industry for a number of years with artists such as Kanye West going from joke designer to lauded entrepreneur. The most recent example of this polymathic drive was Rihanna becoming the first woman of colour to head up a fashion brand at LVMH.

ENTREPLAYEURS

"They have to be on it [with new ventures]—you always hear stories about washed up, broke ex-players. Football careers are short—they need to put things into play now for the long term."
- Fan, LDN

"I think football should be your number one priority. People say you should have other stuff outside of football, but I don't think you should."
- Roy Keane on Jesse Lingard's fashion label

ENTREPLAYEURS

Whether it be opening restaurants or coaching the Under 10s, footballers have always had to find new purpose and work after their playing careers have ended. Beyond punditry and management, new businesses are usually done behind the scenes.

However, more and more players are now looking to publicly launch business ventures in parallel to their football career while their personal 'brand' is at its peak. Often going beyond the traditional brand endorsement, these players are looking to invest in their non-football passions in a serious, business-minded fashion.

Old guard media commentators have, unsurprisingly, been very disparaging about such ventures, seeing such players as having ideas above their station and lacking focus. However, this trend

is symptomatic of a larger shift in values amongst these modern fans and Gen Z in general.

A mixture of increasingly accessible digital tools and a belief that society won't look after their future, means this generation are more likely to take things into their own hands—whether that be their health, social issues, or education. It also extends to their employment, where 'slash careers' allow them to follow several passions while appearing adaptable.

Years of honing their personal brand on social media has also left them well positioned to package up and monetise their passions. Given all this, fans are very open to their footballing idols exploring other ventures alongside the game, keen to learn valuable lessons about the journey.

COPA PREDICTION: As player brands will transcend game, fans buy more into the individual, and their mix of ventures and businesses, not just football.

Brands ought to think about new ways to activate around these entrepreneurs and their products, such as a player like Lingard expanding his fashion product distribution via entrepreneur teens on their Depop stores.

CLOSING THOUGHTS

So there you have it, another pulsing ride through the world of young football fans, and the cultural landscape they inhabit. We have seen how local market nuances are driving more and more innovative ways to interact with the 90 mins, while content outside of the match is becoming even more entertaining and exciting.

As these new platforms and innovations reach critical mass, **the tensions between young fans and the views of governing bodies and traditional media are becoming more acute**, with the latter struggling to keep pace with the new values that fans apply to players and the game. 'Even finding enough suitable images of female fans for this very report was a struggle, which shows how far behind the industry is lagging.'

The melting pot that is football has also seen several key social issues rise to the forefront of these young fan's minds, **and lines are being drawn in the sand**. Both via grassroots activism and education, and by Modern Fans wanting to hold clubs, brands, and governing bodies more accountable.

Modern Fans expect and demand more and better from their footballing worlds—let's see what 2019 holds for them.

Our research methodologies

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* *Online survey N.2,110*
16–24-year-old football fans in the UK, USA, China, and Brazil

* *Qualitative fan groups in the UK and USA*

* *Twenty expert interviews with industry insiders and commentators*

* *Various third party white papers and articles*

All images Rex Features unless otherwise stated

