

# Havas launches in-depth research on football, sport fans

Havas Sports & Entertainment (HS&E), in partnership with the Annenberg Innovation Lab at the University of Southern California (USC), has unveiled an extensive global study, entitled FANS.PASSIONS.BRANDS, that looks across both sport and entertainment to understand how and why fans engage in their passions.

This new research looks into the ways fans around the world engage in their passion for sport and entertainment, with a specific focus on football fans, defining a unique new framework to understand and interpret fan attitudes and behaviours. At the core of this global research lies a survey conducted in 15 countries decrypting the passions of 21,000 people, timeous as the 2014 FIFA World Cup rolls out.



It offers a novel approach to fan identities by expanding on fan behaviours, attitudes and perceptions to derive an innovative new set of principles that categorises the relationship between fans and their passions: the Logics of Engagement.

## Eight Logics of Engagement

The study applies Eight Logics of Engagement to fans:

- 1. The Logic of Entertainment** - enjoyment of the overall experience & atmosphere - for example, a fan who enjoys watching a game even if his/her favourite team isn't playing, just for the enjoyment of the show.
- 2. The Logic of Immersion** - will to lose oneself in the emotion of the game/plot - for example, a fan who thinks of nothing but the game while the game is going on. Wins and losses may greatly affect his/her mood.
- 3. The Logic of Social Connection** - desire to create or deepen relationships with other fans - for example, a fan who supports a team because it is the team his/her family supports. He/she enjoys conversing with other fans while watching games in a public place and enjoys making posts/tweets about the match/show.
- 4. The Logic of Play** - virtual or real life participation in activities related to one's passion - for example, a fan who has grown up playing the game, and may still play. He/she enjoys playing video games related to his/her passion at home or by mobile.
- 5. The Logic of Identification** - self-association with the team, players/characters and their emotions - for example, a fan whose moods are tied directly to a team's successes and failures. He/she feels guilty about not watching games, possibly for superstitious reasons.
- 6. The Logic of Pride** - reflection of the action/results in one's attitude and outward appearance - for example, a fan who wears a jersey or hat of their team, or names his/her pets after a player. He/she might burn his/her team scarf after a loss or buy a new one after a win.
- 7. The Logic of Mastery** - interest in learning and understanding the details behind strategies and stories - for example, a fan who plays fantasy sport games or who reads most pages of the sport pages and listens to post-game TV shows. He/she knows the rules of the game, as well as the history of the team and players.
- 8. The Logic of Advocacy** - championing on behalf of one's passion - for example, a fan who yells at referees and isn't afraid to stand up to fans of rival teams to defend his/her team at all costs. He/she may own a small stake in the team.

## Developing a nation

Andrew Ross, MD of HS&E South Africa says, "In the South African context, it is important to realise the role of sport in developing the nation. Sport provides people not only with a form of entertainment, but also with a sense of pride, a sense of association and a sense of escapism. In a country like South Africa where people often face a difficult social and economic environment, the sense of escapism that sport provides is an important factor.

"Many of South Africa's leaders recognised the vital role that sport plays in uniting and building a nation, such as Nelson Mandela - think '95 Rugby World Cup. Lifting the trophy provided South Africa with a sense of national pride and a unified desire - and this is the power that sport has.'

## Football fans and national team preference

Football fans represent an interesting case study given it is the #1 preferred sport globally and 60% of women worldwide profess to be interested in this sport.

Most football fans prefer their national teams, with some interesting exceptions: Over half (52%) of people interested in football see their national football team as their #1 favourite football team. This applies to a great majority of countries, with the notable exceptions of the UK and Spain, where support is higher for national club teams - 66% in the UK and 52% for Spain, as well as South Africa where 34% of football fans are loyal to foreign club teams.

In China, fans selected their national team (25%) as their #1 favourite as much as other national teams (26%).

An interesting outlier is the US, the country least interested in football, where 26% of football fans state that they are more a fan of the sport than an actual team or player.

Looking back to the logics of Engagement, fans that cited their national team as their #1 preference engage more through the logics of social connection and entertainment, which contrasts to those who prefer club teams, who engage mainly through social connection, identification and pride. Fans who prefer club teams therefore show a closer association than national team supporters.



## Market findings

Fans of sport in different countries use different logics to engage with their passion.

Over half of German fans cite advocacy and play as the logics they engage with the most, which stands out from the global average. Entertainment is the least cited logic by German fans while it is the most frequently reported logic in France and the UK, which, on the contrary, show very low levels of advocacy and play. For France and the UK, this finding corresponds with the high numbers of people interested in football and low numbers of self-declared very passionate sport fans (12% in France and 10% in the UK of very passionate fans vs a global average of 17% and in contrast to 27% of very passionate fans in Argentina, 30% in China and 26% in Spain).

China also stands out, not only as the most passionate country about sport but also as the only country where fans engage the most through the logic of mastery, with half of Chinese sport fans engaged through this logic. These passionate fans are in line with the global trends in terms of the most cited logics, but with almost double the percentages of global engagement.

In some countries, one logic stood out as the favourite by fans, identification in the case of Italy, where 95% of fans support teams from their country.

Portugal and Brazil both share a preference for immersion, while Colombia, Mexico, South Africa, Argentina and the US all share a preference for the logic of pride.

Fans in Poland and Chile engage through Entertainment as the first logic while Russian fans engage through Social Connection by 24% more than any other logic.

## **Very passionate fans & influencers**

Fans who declare themselves very passionate about sport, engage most readily through five of the eight logics: identification, mastery, pride, social connection and play, twice as much as they engage through the logic of entertainment, the core logic for casual and mature fans.

These five key logics are also the most cited by very passionate football fans, with percentages of engagement almost double those of sport fans.

Football fans who engage in these five logics also display increased brand awareness, more positive attitudes towards brand recommendation and purchase intent for brands who are involved in football sponsorship.

An overwhelming 61% of these fans think that their favourite team or player should get involved with brands that are committed to making a difference in their community, 15% higher than the global average.

The most influential fans engage strongly through the logics of social connection, identification, mastery and pride, which are also the logics that apply to heavy social media users and second screen users.

## **Global trends**

Globally, seven out of these eight logics were strongly cited by global sport fans as the logics they use most to engage in their passion, with nearly one third of all fans finding social connection to play a strong role in why and how they engage in their passion for sport, making the relationship with other fans their priority, followed by the logics of entertainment, identification, and pride.

While the logic of advocacy is the one that comes up the least frequently, fans who engage through this logic do so twice as intensely as fans who engage with other logics.

For fans that identified football as their top passion, the logics of social connection and pride are tied as the most applicable logics. Interestingly, Entertainment comes out as one of the least used logics among football fans, in contrast to sport fans overall.

## **Different approach to fans**

The new framework developed by HS&E and USC will provide brand marketers with new tools, insights and fan clusters based on deep understanding of context and activators and how these foster different ways for fans to engage with their passions, brands and the communities associated with them.

Instead of merely boxing fans into categories based on the strength or level of their passion, HS&E and USC have focused on creating a model for analysis based on fan behaviours and attitudes to allow for a much more nuanced approach.

"The findings from the research show that 34% of the South Africans who were surveyed are loyal to foreign club teams, rather than local national or club teams. Local fans are looking outward for inspiration and we need to ask why this is? This

research provides insights for brands into how they should engage when analysing audiences and sporting fans. It steers away from the application of generalist demographics and advocates a new framework by which insights into the behaviour of fans can be understood on a deeper level. This kind of research is exceptionally important in a country like ours, where sport is a huge driver of national pride and where there are several sports that ignite this pride and passion in the fans," explains Ross.

"Fans are much more complex than people tend to assume," says USC's Erin Reilly, creative director/research fellow, USC Annenberg Innovation Lab. "In our refined framework; fans are seen to engage in multiple logics at the same time, in varying degrees. For example, we often see fans using one or two logics heavily, such as pride and social connection, especially when they are in public situations like a stadium or a bar. Other fans use different logics, such as identification or entertainment, when watching alone at home."

## **World Cup fan results**

Lucien Boyer, global CEO & president, HS&E, adds, "Everyone has passions, be it music, sport, entertainment, art, food... inside every person lies a fan. This is why we have always looked at people through the lens of fanship and fan communities, in order to help our clients develop meaningful experiences that resonate with the fan inside everyone."

"For the 2014 FIFA World Cup, we are proud to be working with three of the six FIFA Partners (The Coca-Cola Company, Hyundai-Kia and adidas), FIFA World Cup commercial affiliate Louis Vuitton, as well as over five national team partners in 10 countries to engage fans in creative and innovative ways around the biggest global celebration of football."

"During the FIFA World Cup we will be on the ground in Brazil to connect with fans directly, observing and interviewing them, as well as tracking twitter conversations globally during matches as online conversations are firmly linked to how we experience the event. The additional smart data and qualitative learnings that we will gather, together with a deeper analysis of the global survey will, we believe, result in interesting new insights that will be available for all our clients and partners in the fall of 2014."

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