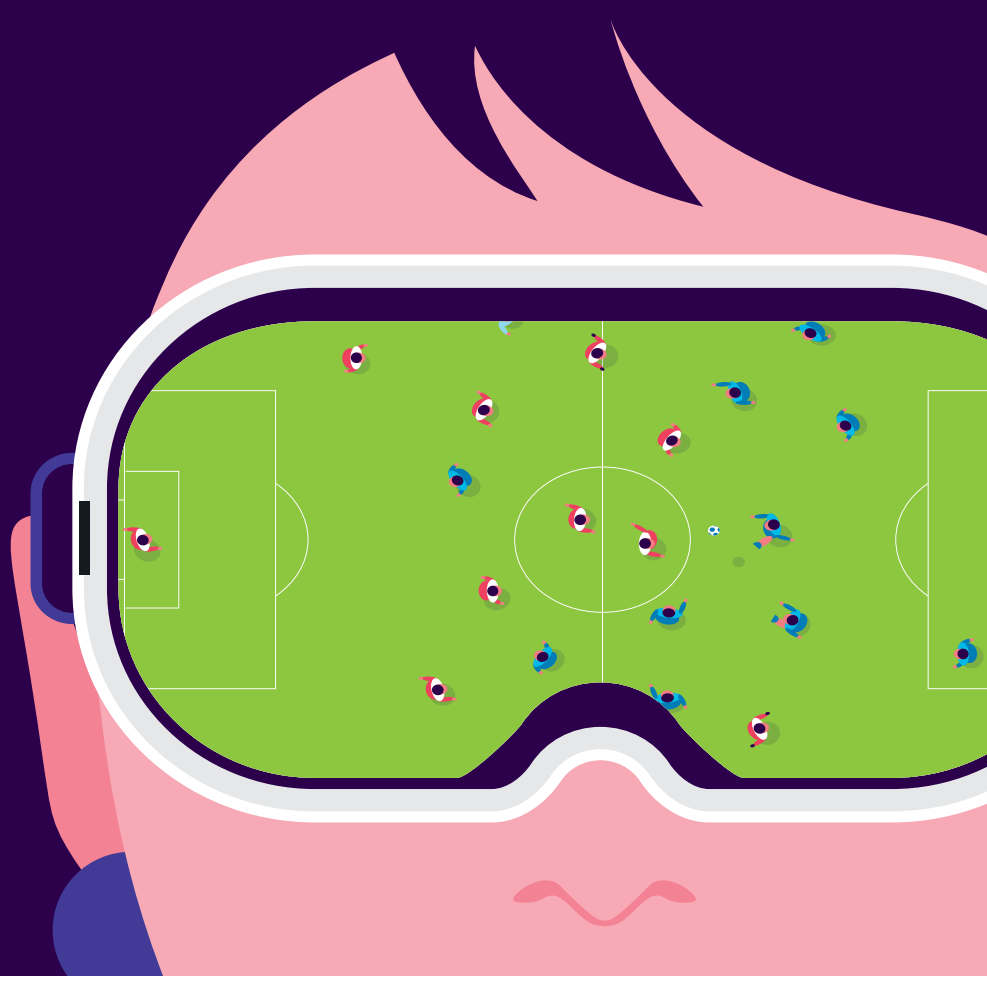


Emerging technologies in sports

Reimagining the fan experience

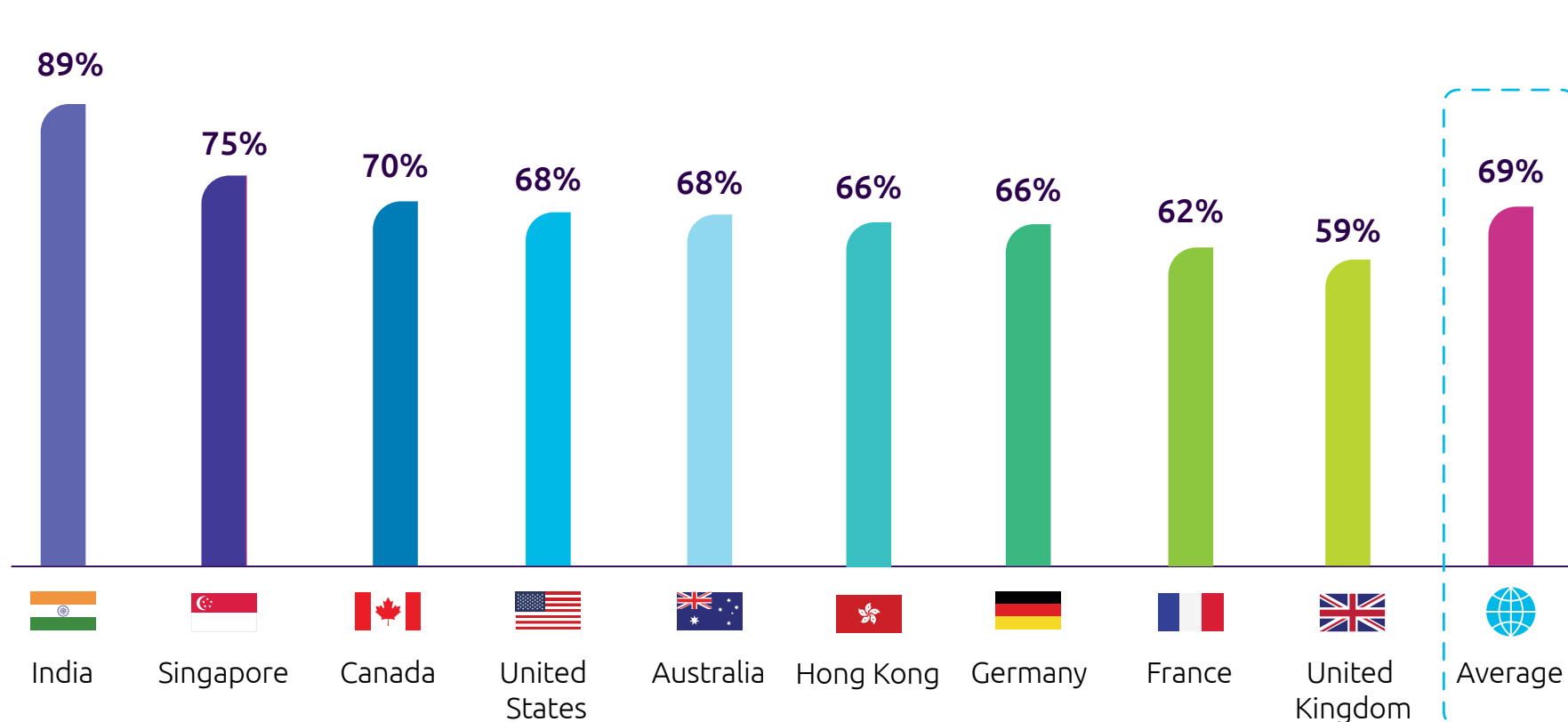


Technology is now an integral part of how fans consume sports

Sixty-nine percent of fans report that the use of emerging technologies has enhanced their viewing experience – both inside and outside the stadium

Emerging technologies have enhanced the fan experience across countries

Share of fans who feel that the use of emerging technologies in sports has enhanced their overall viewing experience



Source: Capgemini Research Institute, Emerging Technologies in Sports Research, Fan Survey, December 2019, N=10,363 Fans, 9,008 Fans who have visited the stadium.

Increasing number of fans are using emerging technologies inside and outside the stadium

Top three use-cases inside the stadium	Top three use-cases outside the stadium
Getting regular updates on a mobile app while watching the match live	Streaming matches live on VR headsets to simulate the in-stadium experience
Accessing Wi-Fi to share updates on social media	Ability to choose different camera angles to watch the match
Order food and beverages online and for delivery to the seat.	Match prediction game where fans compete with an artificial intelligent bot

- Asian fans (74%) are much more likely to have experienced emerging technology in the stadium with India leading at 88%
- 71% Asian fans would be willing to pay more if new technologies enhanced their stadium experience, as compared to 40% of North American fans, 34% of European fans, and 33% of Australian fans



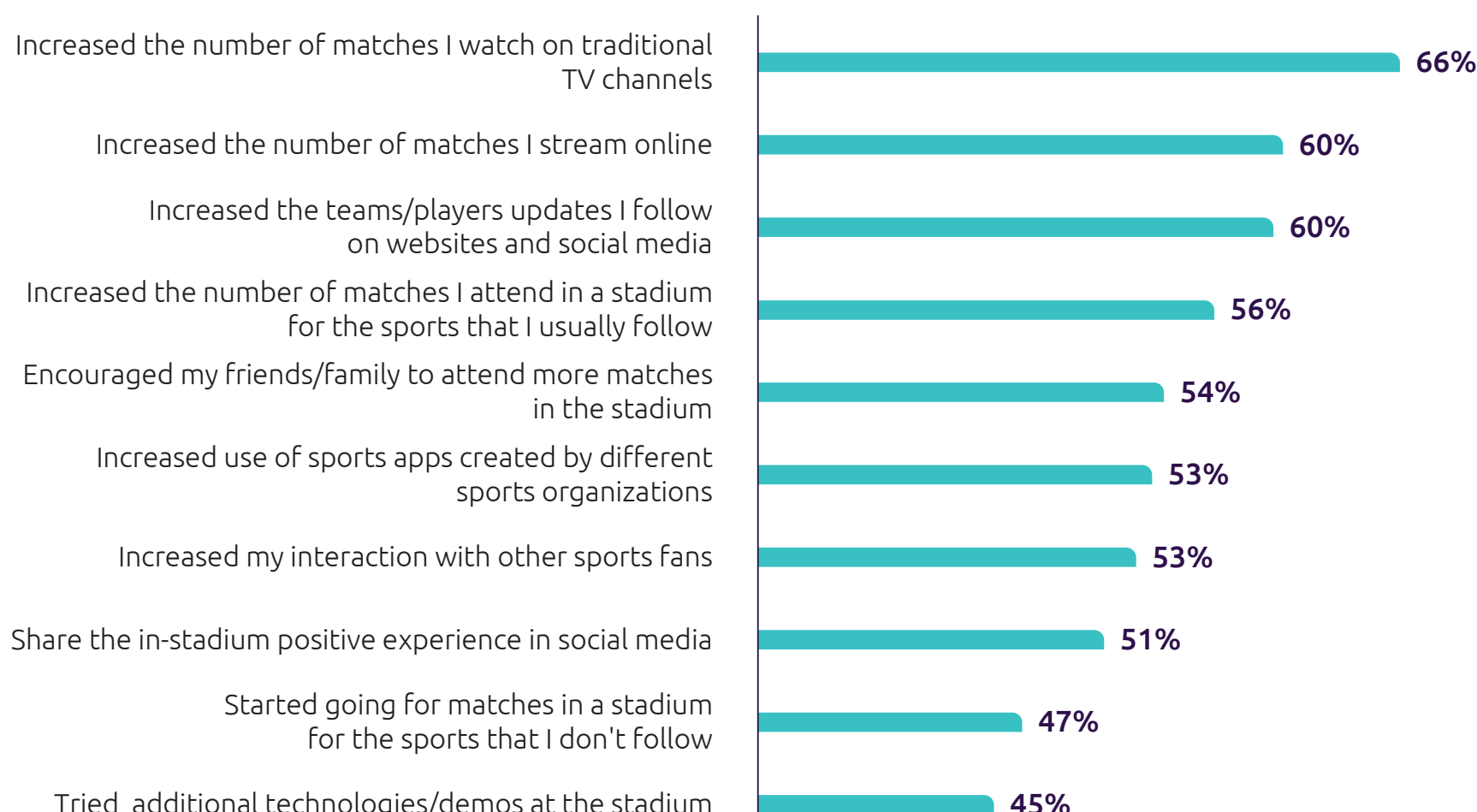
“The use of virtual reality in reviewing training sessions and matches can have a big impact on sports.”

Tom Mitchell, team captain, England Rugby Sevens

Effective use of emerging technology in sports represents a significant brand value and growth opportunity

When a fan has a good experience with technology – either in or out the stadium – it has a positive knock-on effect in terms of their overall engagement

“On having a good experience with technology in sports inside and outside the stadium, I have...”



Source: Capgemini Research Institute, Emerging Technologies in Sports Research, Fan Survey, December 2019, N=10,363 Fans, 9,008 Fans who have visited the stadium.

A positive tech-enabled experience offers a significant commercial upside

- 49% said they have often increased their spending on team/brand merchandise following a good experience, and 42% have increased this spend a few times.
- 92% said increased their spend on online subscriptions for watching matches (either often or a few times).



“Through tech, a system can run advanced tests, analyze, and share increasingly accurate outputs about what you can and cannot do”

Amanda Ouedraogo, athlete

Unlocking the value of emerging technologies in sports: match-winning strategies



Reassure fans on the use of personal data



Identify user needs before investing in and deploying new tech



Convert more fans to 'avid' fans



Build digital practices, capabilities, and transform organizational culture

Source: Capgemini Research Institute, Emerging Technologies in Sports Research, Fan Survey, December 2019, N=10,363 Fans; Capgemini Research Institute Analysis.

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