

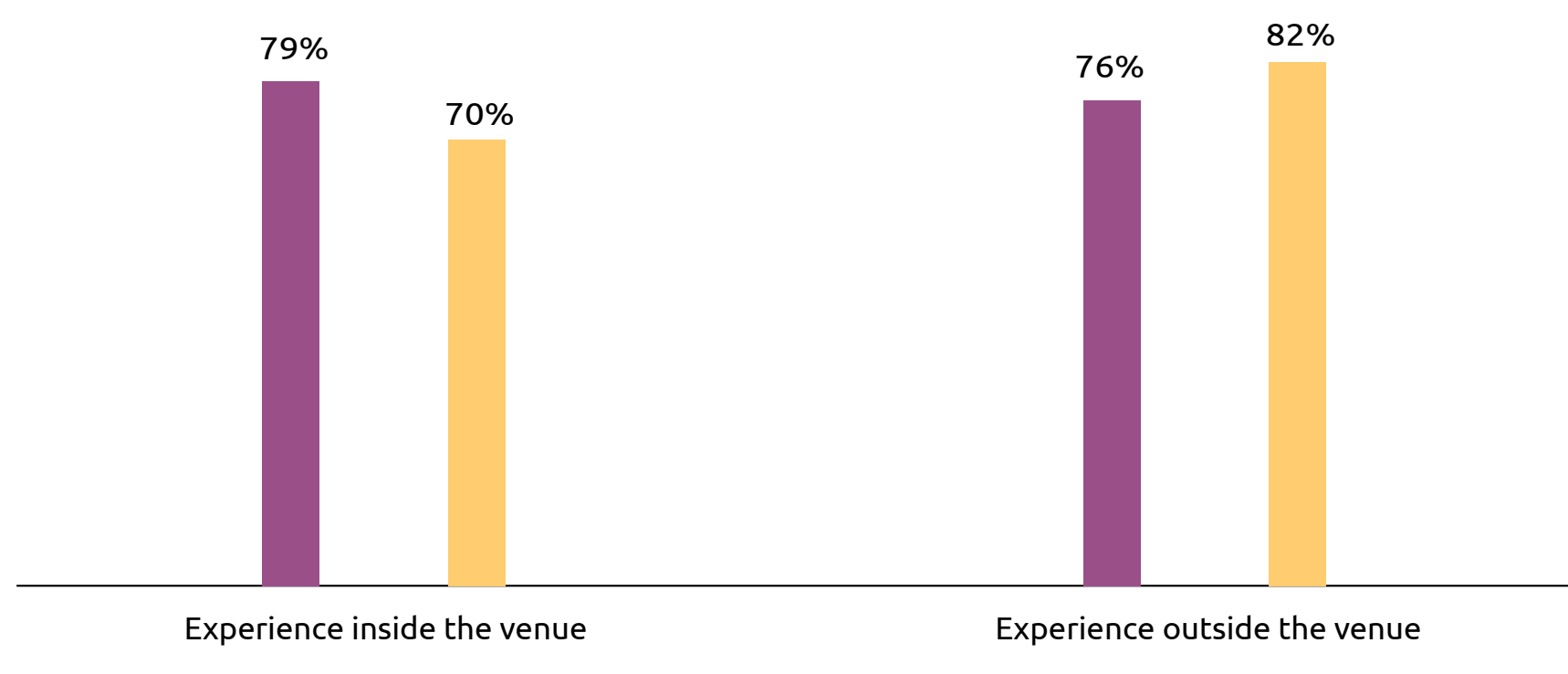
A whole new ball game

WHY SPORTS TECH IS A GAME-CHANGER

Technology is increasingly driving sports consumption outside the venue

Fan satisfaction from tech-enabled outside-venue viewing experiences is greater than that for the in-venue experience

Fan satisfaction level from tech-enabled viewing experiences, in-venue vs. outside-venue

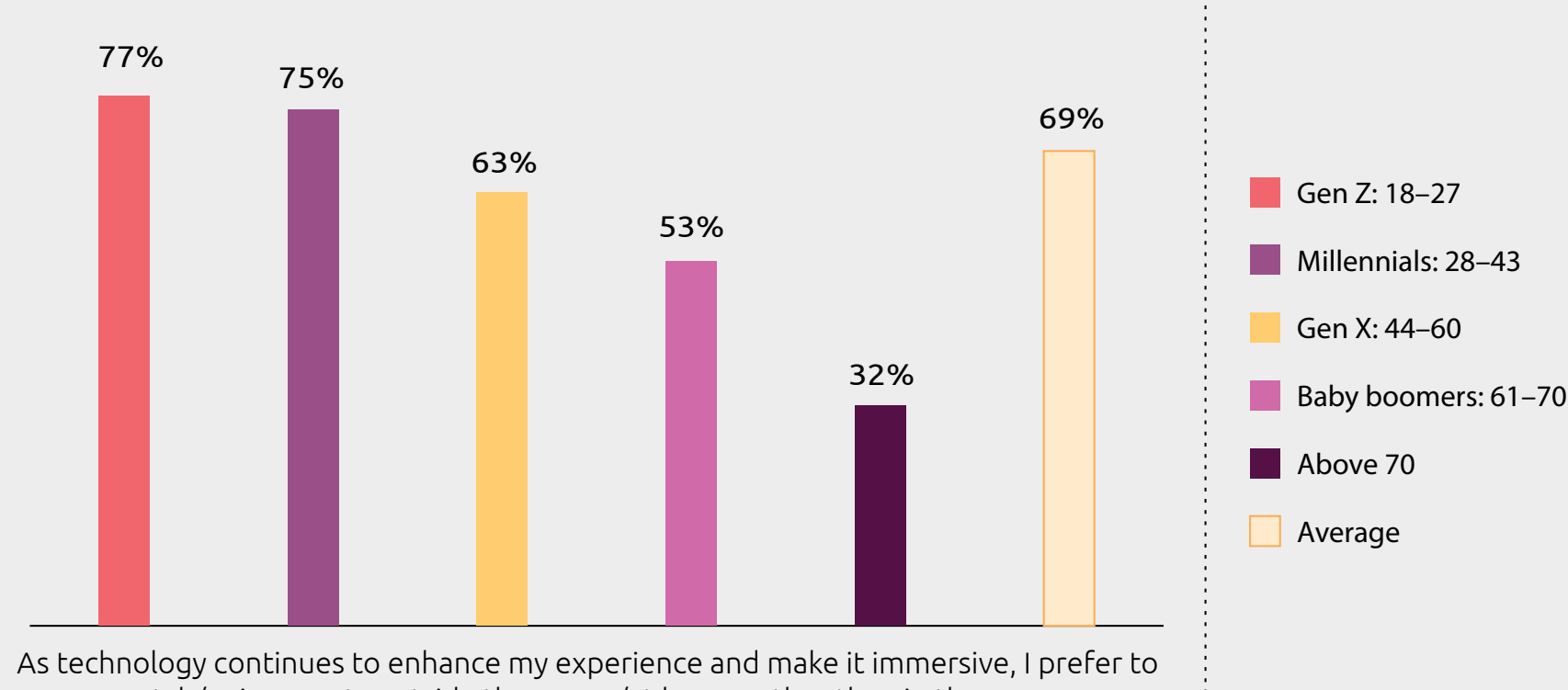


Source: Capgemini Research Institute, tech in sports research, fan survey, March–April 2023; N = 7,081 Fans. *Emerging technologies in sports, 2020.*

Note: The 2023 sample for this chart includes only those countries covered in the 2020 research.

Fans will prefer to consume sports outside the venue/at-home as technology continues to enhance their viewing experience

Fan preference on future viewing experience enabled by technology, by age, 2023



As technology continues to enhance my experience and make it immersive, I prefer to watch/enjoy sports outside the venue/at home rather than in the venue

Source: Capgemini Research Institute, tech in sports research, fan survey, March–April 2023; N = 12,004 Fans.

Satisfaction with the outside-venue tech-enabled experiences has led to a fall in visits to sports venues, especially for younger fans.

Demand for smart devices and services for sports consumption has increased substantially

Fan preference of platforms for consuming sports content

DEVICE	Q4 2019	2023	SERVICE	Q4 2019	2023
Smart TVs, laptops, desktops, iPads, etc.	62%	74%	Streaming platforms (ESPN+, Hulu, Hotstar)	39%	75%
Smartphone screen	40%	70%	Social media	44%	64%
Traditional TV	81%	70%	Apps by third parties/pay TV providers	45%	55%

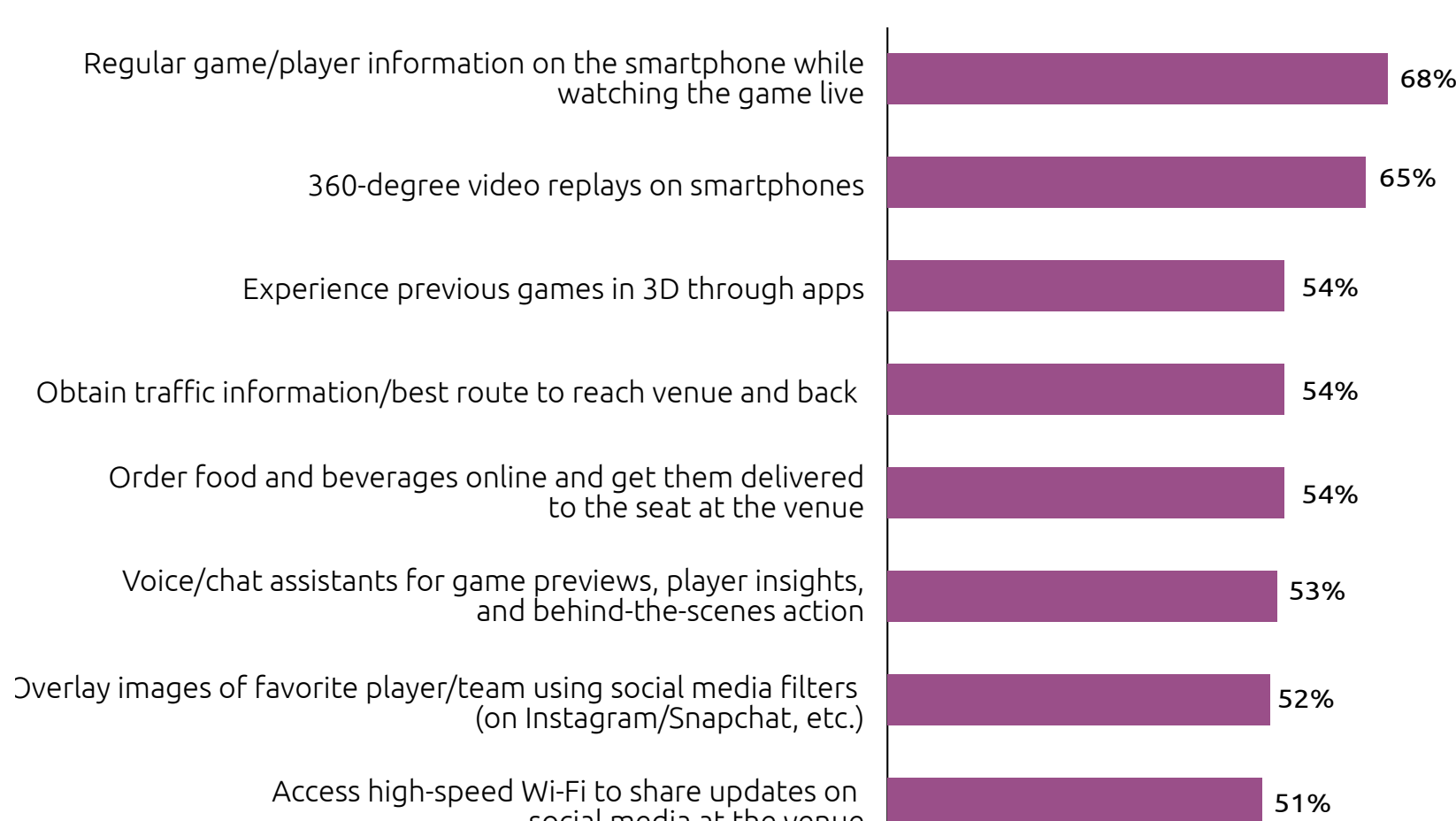
Source: Capgemini Research Institute, tech in sports research, fan survey, March–April 2023; N = 7,081 fans; *Emerging technologies in sports, 2020.*

Note: The 2023 sample includes only those countries covered in the 2020 research.

Fans are keen to try advanced-technology experiences

Fans often use technology to get regular game updates and to catch up

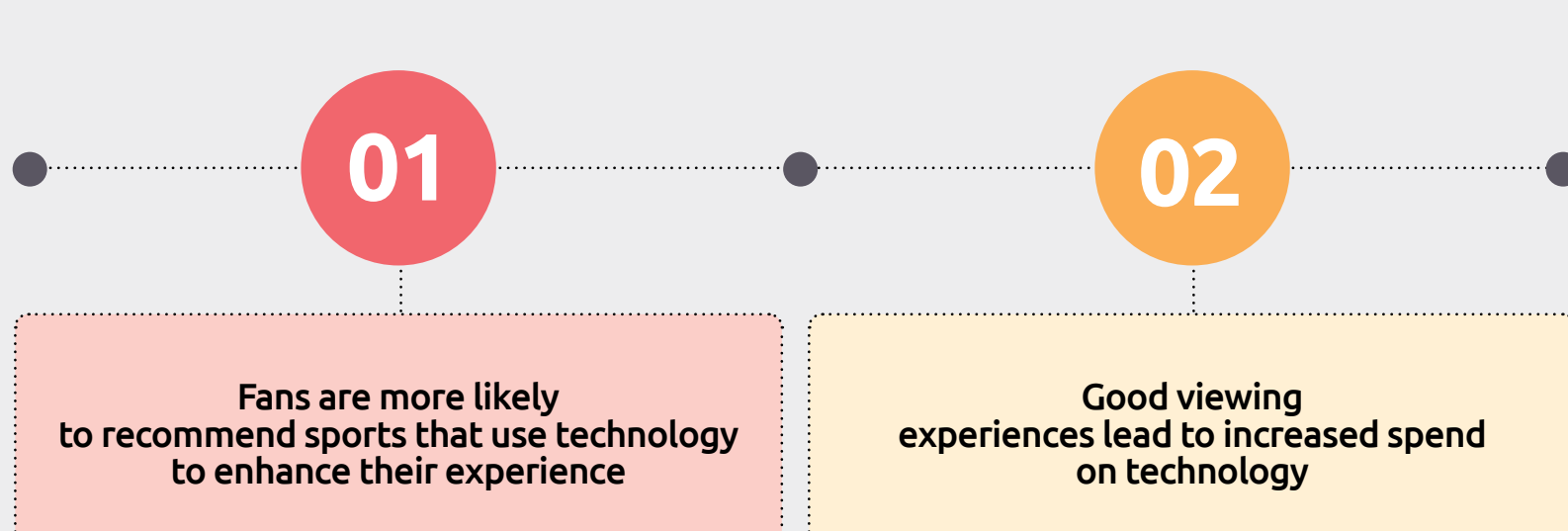
Top technology fan experiences, 2023



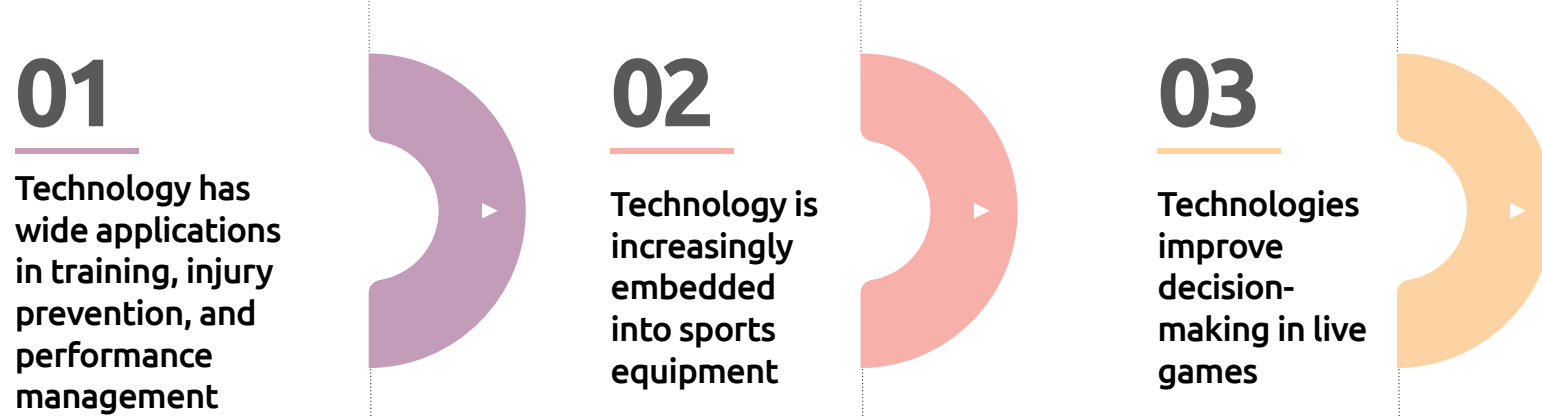
Source: Capgemini Research Institute, tech in sports research, fan survey, March–April 2023; N = 12,004 fans.

Fans are open to trying a variety of immersive and wearable technologies, as well as new advanced tech phenomena such as purchasing digital collectibles and the metaverse.

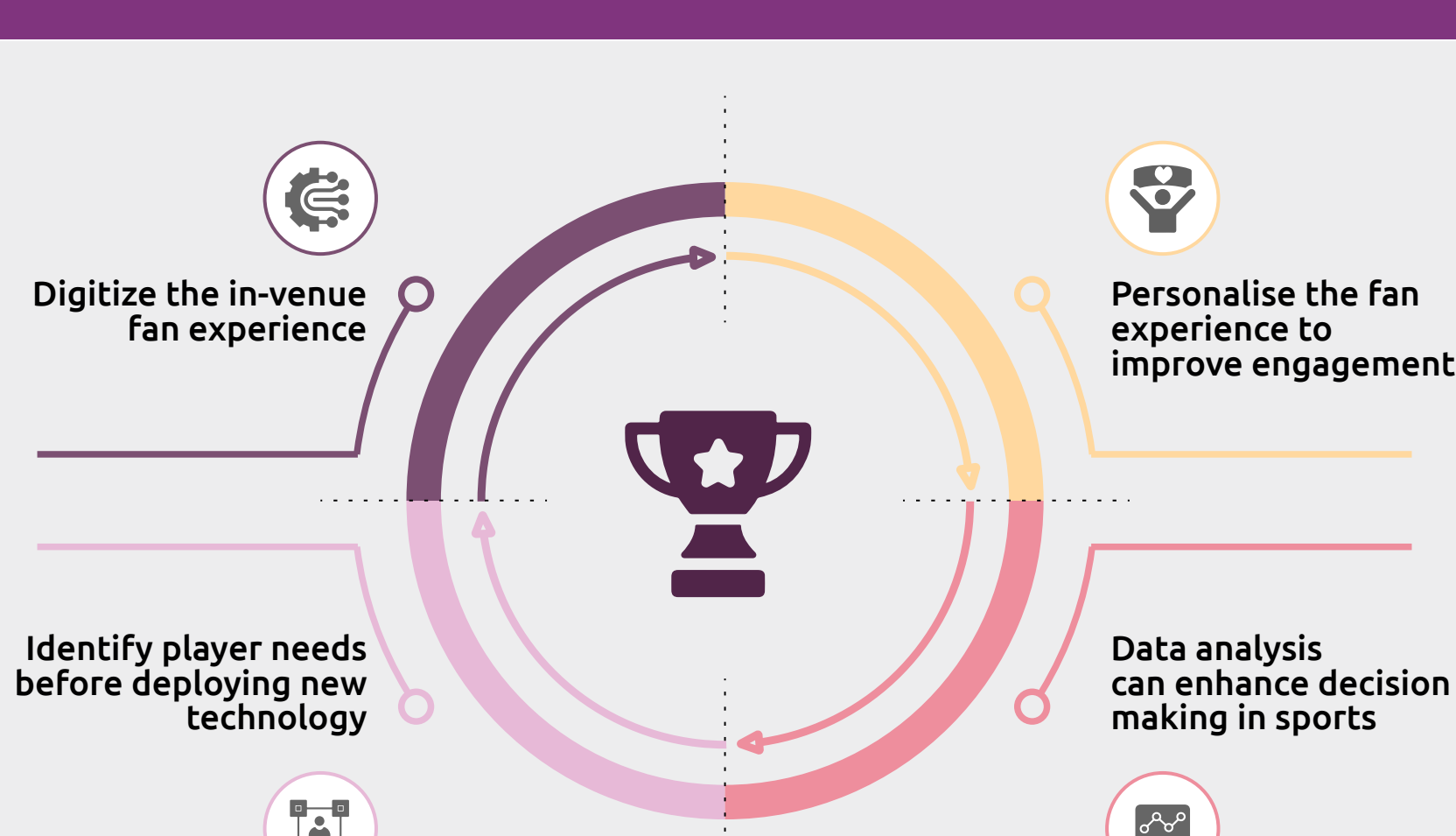
Fans favor teams and organizations that offer a good tech-enabled experience



Technology has fundamentally changed sports training and performance



Unlocking the potential of technologies in sports



Source: Capgemini Research Institute Analysis.

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