UNIVERSITY OF LJUBLJANA

SCHOOL OF ECONOMICS AND BUSINESS

MASTER'S THESIS

AN ANALYSIS OF DIGITAL FAN ENGAGEMENT IN SHOWJUMPING EQUESTRIAN DISCIPLINE

Ljubljana, December 2024   NEJA BEVC

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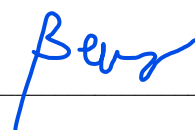Ljubljana, December 18th, 2024   Author's signature: _____

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LIST OF ABBREVIATIONS

sl. – Slovene

3D – (sl. Tri dimenzijonalno); Three dimensional

AI – (sl. Umetna inteligenca); Artificial Intelligence

AR – (sl. Obogatena resničnost); Augmented Reality

CRM – (sl. Upravljanje odnosov s strankami); Customer Relationship Management

CTV – (sl. Povezana televizija); Connected TV

EU – (sl. Evropska unija); European Union

FEI – (sl. Mednarodna konjeniška zveza); Fédération Equestre Internationale

FIFA – (sl. Mednarodna nogometna zveza); Fédération Internationale de Football

FN – (sl. Nemška nacionalna konjeniška zveza); Fédération Équestre Nationale

GDPR – (sl. Splošna uredba o varstvu podatkov); General Data Protection Regulation

ICT – (sl. Informacijsko-komunikacijska tehnologija); Information and Communication Technology

IT – (sl. Informacijska tehnologija); Information Technology

LL – (sl. Beleženje življenja); Lifelogging

MLB – (sl. Glavna bejzbolska liga); Major League Baseball

MR – (sl. Mešana realnost); Mixed reality

MW – (sl. Zrcalni svet); Mirror Worlds

NBA – (sl. Narodna košerkeška zveza); National Basketball Association

NFL – (sl. Narodna nogometna liga); National Football League

NFT – (sl. Nezamenljiv žeton); Non-Fungible Token

NHL – (sl. Narodna hokejska liga); National Hockey League

NLP – (sl. Procesiranje naravnega jezika); Natural Language Processing

OTT – (sl. Čez rob); Over-The-Top

QOL – (sl. Kvaliteta življenja); Quality of Life

TV – (sl. Televizija); Television

UEFA – (sl. Unija evropskih nogometnih zvez); Union of European Football Associations

USA – (sl. Združene Države Amerike); United States of America

VR – (sl. Navidezna resničnost); Virtual Reality

WNBA – (sl. Ženska narodna košerkaška zveza); Women's National Basketball Association

1   INTRODUCTION

In the rapidly evolving landscape of sports, digital fan engagement has become a critical area of focus for sports organizations seeking to connect with their audiences in more meaningful and interactive ways. This master thesis explores the current state of digital fan engagement within the context of showjumping, the most popular equestrian discipline with a rich history and global following. The primary aim of this thesis is to obtain a holistic understanding of how digital technologies intersect with sports fans, while the objective is to provide a comprehensive overview of digital fan engagement in general and identify how the showjumping community is leveraging it. The core research questions are:

1.   What is fan engagement in the context of sports?
2.   How has fan engagement evolved, and what factors have driven the changes?
3.   What are the characteristics of fan engagement in showjumping and how do they compare to other sports disciplines?

The motivation behind this research is the belief that the successful exploration of digital technologies can drive positive change. Given that studies on fan engagement, particularly in the digital realm, are relatively recent, this area of research is timely and relevant. However, the existing literature is fragmented, reflecting over 200 sources contributing to the thesis. Interpretation of those sources attempts to consolidate insights by providing a structured analysis.

The thesis is structurally divided into three parts. The first part is theoretical, consisting of the definition of sports fan and the concept of fan engagement, exploration of goals and channels of fan engagement, as well as inspection of potential anticipated challenges in this domain. The second part provides an overview of showjumping as an equestrian discipline, including an analysis of the market dynamics in the two most successful showjumping countries – Germany and the USA. These two sections set the stage for the empirical investigation by contextualizing the subsequent analysis and situating showjumping within the broader context of global sports. The final section of the thesis is empirical, focusing on the primary research conducted to answer the core research questions. This involved obtaining data through expert interviews with industry professionals Blaž Žitnik, Sportradar's Vice President of the Betting Entertainment Tools department, Alicia McLaughlin, Director of Marketing at Wellington International and Helena Matjašec, representative of ClipMyHorse for East Europe division, who also provided ClipMyHorse's internal data and annual reports from 2019 to 2024. This primary data provided a valuable understanding of the digital fan engagement landscape, with some insights specific to showjumping. By defining the strategies and channels employed in this context, and analyzing engagement metrics, the research offers an understanding of how digital fan engagement is currently being implemented and perceived within this niche sport.

Key general trends in the shifting landscape of sports consumption were identified. Traditionally, sports fandom was deeply rooted in local communities, with fans showing lifelong loyalty to a single team, often passed down through generations. However, the rise of digital technologies has transformed this dynamic. Today, sports consumption is no longer restricted by geography, such as being limited to the stadium, or by time, such as only on match day. Instead, it has expanded beyond traditional media channels, offering fans new ways to engage with their favorite sports or sportsman, anytime and anywhere. Even though younger generations show a preference for watching games away from the venue, linear Television (TV) sports consumption is on a fall. Watching a game is increasingly seen as a part of a broader social experience. With the rise in number as well as the popularity of various channels like streaming services, social media, fan apps, eSports, metaverse, and betting, fans are engaging with sports continuously and globally, creating a more connected and immersive experience.

Drawing direct parallels between traditional sports and showjumping, especially in the context of fan engagement, is challenging. Equestrianism is a niche sport that doesn't necessarily have a traditional fan base, as equestrian enthusiasts mostly share a passion for an animal, rather than an interest in the competitive aspect of the sport. Fédération Equestre Internationale (FEI) states %50 of their digital traffic is non-sport related. Furthermore, equestrianism tends to be very traditional. It has historically been slower at adopting technology in comparison to other sports. On top of that, it never heavily relied on television exposure. A big step forward has been made in the COVID-19 pandemic, especially on the streaming side. Yet engagement is still almost exclusive to streaming services and social media, as other engagement channels like fan apps, fantasy sports, or betting, largely remain untapped. It seems like digital presence is more seen as a value proposition to attract sponsors rather than engage with fans.

Despite the differences, there are notable similarities, especially in the consolidation of streaming channels, engaging younger audiences, building a global fan base, and preference for consumption through mobile devices. As digital platforms continue to proliferate, and as data collection becomes more sophisticated, the future of fan engagement will increasingly revolve around the intersection of technology, fan experience, and global connectivity. The future of fan engagement in showjumping, on the other hand, will depend on strategies adapted to broaden its popularity and keep up with technological innovations. At the moment, the sport appears to prioritize maintaining its niche appeal, while other sports have actively explored different channels to connect with their audiences. If showjumping aims to expand its reach and attract greater audiences, a more proactive exploration of diverse engagement strategies may be needed.

2 DIGITAL FAN ENGAGEMENT IN SPORTS

Throughout history, sport has played an evolving role. In ancient times, Sumerians and Egyptians utilized sport for war preparation. Later, Greeks and Romans added religious and social significance to it. Although it shortly lost relevance in medieval times, athletic bodies were often depicted in art, especially in Christian representations. In the Renaissance, sport was introduced to school curricula, and wasn't disputed even by protestants who opposed many similar leisure activities. In the Victorian era, Victorians saw sport as character character-building activity. Today, sport has a significant role in our society. It is attracting the attention of the general public to such an extent that it has its own section on national news. All sorts of problems are being addressed by harnessing the power of sport, from anti-social behavior to obesity (Devine & Frias, 2020). It has also taken a central role in the entertainment funnel (Previati, 2020).

Wright (2009) defined sport as an activity that is competitive, non-hostile, and must be pursued in presence. For Suits (1978), all sports are games, described as »the voluntary attempt to overcome unnecessary obstacles« (p. xiii). Morgan (2007) expanded the thought of Suits, and attributed four features to them:

1. Requires a set of skills, compared to a game of chance like throwing dice;
2. Requires physical skills and strategical usage of the body, compared to playing cards;
3. Has a big audience and is more than a specific locality or a temporary trend;
4. Is established social practice that is institutionalized and regulated.

A significant segment of the population is involved with sports. Athletes, their families, coaches, club staff, referees, psychologists, sponsors, and supporters. The latter can be differentiated between spectators and fans because they differ in their level of passion. Spectators are people observing a sports event, while fans are individuals enthusiastic about a particular sport or athlete (Wann, 1995). To gain a deeper understanding of fans and their loyalty, sports organizations must explore their motivations and what drives their continued support. Recognizing and interpreting their behavior is key to improving communication and building lasting relationships (Hüttermann, 2021).

2.1 Sports Fan

A sports fan is an enthusiastic devotee of sports (vocabulary.com, n.d.). Some state the word has origins in Modern Latin, where "fan" translates to "insanely, but divinely inspired" (Das & Katragadda, 2022), while others denote the etymology of the word to the word "fancy". The fancy was an expression used for followers of any sport, but mainly boxing, in the early 18th century. Word was popularized in the 1880s when Ren Mulford Jr. from the sports journal Sporting Life started using the word to describe basketball devotees (Shulman, 1996).

An interpretation of what it means to be a sports fan can be sensed through well-established theory that compares sports fandom to religion. This comparison remains provocative due to similarities from a social-scientific perspective. Just like religious people visit remote and distant holy places, fans tend to travel far to visit iconic sports sites. They both hold intimate associations with specific symbols to delineate group identity. There is also a similar vocabulary associated with both, e.g. dedication, commitment, spirit, devotion, and celebration. However, critics point out we need to be careful with the comparison regardless of the similarities, especially with vague definitions of religion and commonly added negative connotations (Eliott, 2021).

Wann (1995) classified eight different categories of motivation behind sports fans:

1.   Positive stress called eustress;
2.   Enhanced self-esteem;
3.   Escape from everyday life;
4.   Entertainment;
5.   Economic aspect of betting and gambling;
6.   Aesthetics;
7.   Group affiliation;
8.   Family lust.

Da Silva and Las Casas (2017) identified four drivers that influence fan's loyalty:

1. Value of pure entertainment, which is associated with the team's success and has a greater influence on short-term team loyalty;
2. Authenticity, which describes genuine team effort and the pride the team plays with, regardless of the result;
3. Fan bond, which focuses on the personal connection of fans with the team, or its players, and fans believe that their support influences the team's success;
4. History and traditions, that are associated with the team's past success and the lavishness of the club's culture.

Smith and Westerbeek (2003) classified fans into five categories, based on motivation to watch a game and type of behavior, where different incentives will trigger distinctive segments, see Table 1.

1. Aficionados are looking for superior performance. They are loyal to the game itself, rather than a team. They appreciate the high skill and tactical complexity. They attend matches regularly;
2. Theatregoers have little team loyalty. They are driven by the interest in the sport and other sports event activities and complimentary services. Comfort, like the proximity of the venue, is crucial to them;
3. Passionate partisans are core supporters, have strong personal investments, and are very loyal to their team. They're regular buyers of collectible items and merchandise;

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4. Champ followers are supporting a winning team;
5. Reclusive partisans are committed but do not attend the matches frequently.

Table 1: Spectator Categories

Type of Spectator	Motivation	Behavior
Aficionado	Quality performance	Loyal to the game, regular attendance
Theatregoer	Entertainment, excitement	Moderate team loyalty
Passionate Partisan	Identifies with the team	Loyal to the team
Champ Follower	Winning team	Short-term loyalty related to the team's success
Reclusive Partisan	Wants the team to win	Strong loyalty, moderate attendance

Source: Smith & Westerbeek (2003).

Multiple studies have shown that strong fan devotion positively impacts those individuals. Higher identification with a team is associated with improved psychological well-being, including reduced loneliness, enhanced self-esteem, decreased social isolation, and a stronger sense of belonging (American Psychological Association, 2024).

2.2   Fan Engagement through Fan Journey

Fan engagement is essentially providing sports fans with a holistic experience throughout the entire journey before, during, and after a sports event. It encompasses any kind of two-way dialogue between a sports organization and its fans (Barrie, 2023). Biscaia (2021) adds that it consists of online and offline components. It can be seen as customer engagement in a sports context, which often results in behavior that is beneficial to the supported team. This behavior can be non-transactional (e.g., expressing pleasure or displeasure, exchanging team- or sport-related knowledge, identifying through objects that display fandom, etc.) or transactional (e.g., purchasing of tickets, merchandise, event attendance, betting, etc.) (Hüttermann, 2021). Although clubs generate revenues from both behaviors, directly from transactional and indirectly from non-transactional (Huiszoon et al, 2018), transactional behavior is the desired one according to Fowler and Rotko (2023). Revenue growth was the most popular goal of surveyed sports industry professionals in their research with %24.

Sports event organizers have traditionally focused only on engaging with fans on the match day (limited time) and the stadium (limited location). To illustrate other possibilities for interaction, on and off the stadium, as well as on match to non-match days, Fowler and Wilson (2016) introduced the Fan Engagement Model, presented in Figure 1. The first quadrant presents an opportunity for on-site interactions on non-match days. Welcoming fans, and offering stadium tours or other similar activities (in stadium museums, hosting fairs, organizing yoga classes, etc.) increases the sense of belonging. The second quadrant presents opportunities for off-site interactions on non-match days. In this part, digital

technologies play a major role. They not only foster the connection but also enable interaction in innovative ways (eSports, VR, chatbots, etc.). The third quadrant presents the opportunity for off-site interactions on match days, where utilization of digital means is again a primary channel. The authors point out this part might be challenging due to restrictions in media rights, and suggest the creation of behind-the-scenes content. Lastly, the fourth quadrant presents opportunities for on-site interactions on the match days. Live experience should remain central to the sports event organizers. However, the fan experience can be enhanced, including but not limited to using technology. Non-technological activities can consist of live entertainment, while technology can be utilized for weather forecasts, solving vehicle parking problems, and food ordering. Overall, integrated fan engagement digital platform(s) and Customer Relationship Management (CRM) are central to continuous business development, representing access to fan data and scaling down the dependence on match day experience.

Figure 1: Fan Engagement Model
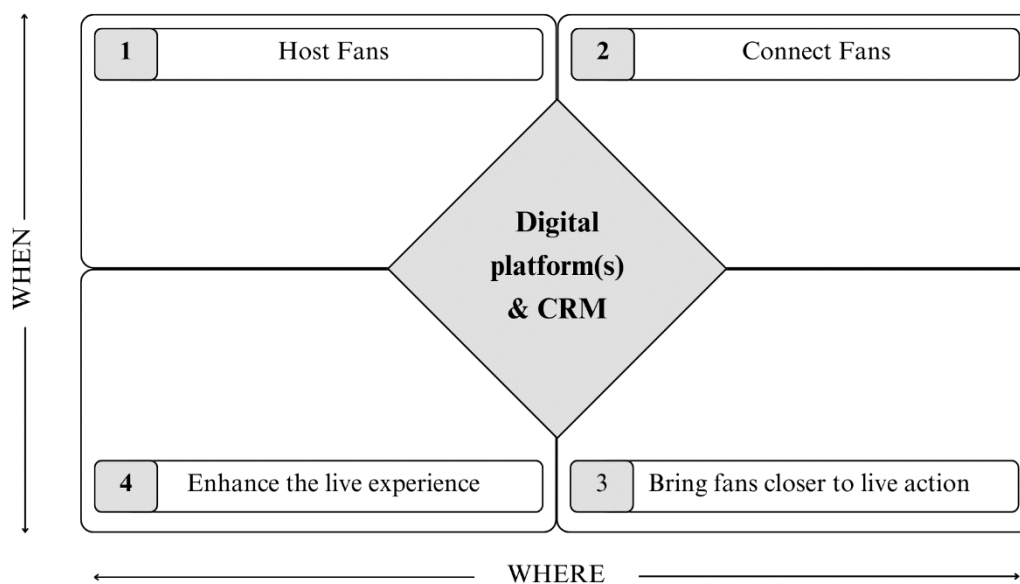
Source: Fowler & Wilson (2016).

Wilson and colleagues (2023), developed The Fan Journey Model, defining eleven touchpoints between a sports organization and a fan, as seen in Figure 2. Awareness of these touchpoints is important for understanding the fan experience. Each touchpoint is an opportunity for sports organizations to engage with the fans, form a relationship and potentially improve the experience by meeting or even exceeding their expectations. The idea is to identify and manage the factors within the control of event organizers to provide fans with the most enjoyable game day experience, regardless of the outcome of the final score. They distinguish between "must do" and "wow factor" activities, where "must do" are considered essential activities, and "wow factor" activities include actions to deliver

exceptional fan experience. Authors recommend the event organizers to evaluate every touchpoint on a scale from 1 – 10 and then plan how to improve them accordingly. In the evaluation, they should empathize with fan's perspectives and deploy post-game surveys.

Touchpoints in chronological order are:

1. Before the Game Activities;
2. Buying A Ticket;
3. Digital Communications;
4. Heading To The Game;
5. Outside The Stadium Activities;
6. Buying Merchandise;
7. Food And Drink;
8. Inside The Stadium Activities;
9. Activities During The Game;
10. Heading Home;
11. After The Game Activities.

Figure 2: The Fan Journey Model
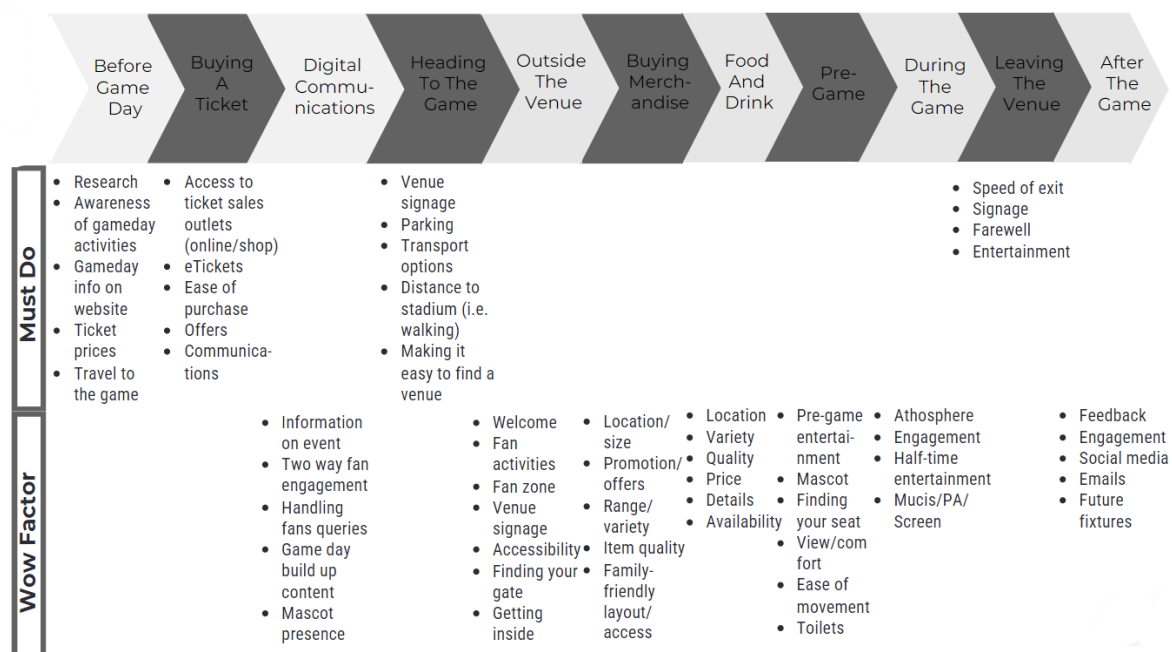
Source: Wilson et al. (2023).

2.3 (Digital) Fan Engagement

Digital engagement encompasses varying digital communication and interaction channels among individuals or organizations and targeted audiences. These channels pertain to but

are not limited to social media platforms, online discussions, content sharing, online campaigns, and customer feedback (Yadav et al., 2023).

The importance of building a digital relationship wasn't noticed only in the sports industry. Ford and Mandviwalla (2020) write about the pressure towards adopting digital means in the arts industry. In their opinion, technology is changing the way the audience engages with cultural institutions as well as performing arts like ballet, orchestra, and opera. They've identified audience engagement as a crucial factor that is driving and shaping the process of digital transformation in the arts industry. Sarode and others (2023) noted a similar trend in the music industry. According to their writing, the COVID-19 pandemic led to new forms of fan engagement that were less common before, like live-streamed concerts and virtual events. They emphasize that changing circumstances call for new fan interaction strategies, suitable for the digital era.

In sports, technological novelties are transforming the dynamics between fans and their beloved teams. We live in an age where deep connection to fans is easier than ever. Sports availability and experience have significantly improved (Benigni et al, 2014). Keeping track of a particular team or league, or obtaining information about a specific sport is consistently becoming more convenient. Internet significantly enhances sports participation by providing comprehensive information related to teams, venues, and interactive features (Romero-Jara et al., 2023). In today's context, being a fan is beyond watching and cheering. Fuelled by the influence of digital technologies like social media, podcasts, and e-sports, fans get behind-the-scenes access to players, coaches, and owners. Digitalization and especially the growth of digital, mobile, and social platforms, enables fans a way to stay connected before, during, and after a game. Whether fans are watching their favorite team play from the comfort of their homes, at a sports bar, or live in the stadium, sports marketers are keen on enriching the experience and boosting fan engagement by tailoring the use of technology to each environment (Da Silva & Las Casas, 2017).

Sports stadiums used to be a central element of fan engagement, with a focus on the local environment. Through time sports organizations realized the potential of expanding beyond local environments to reach global audiences. Today's engagement therefore happens mainly over digital means as it enables global reach. The fan may never visit a stadium or attend a live game but still has to be considered a fan and a club supporter (Žitnik an interview, 2024). The trend is also evident in the investments in physical sports infrastructure. In the 1990s, the United States alone witnessed an investment of over $16 billion in stadiums and sports arenas (Miller & Washington, 2011). However, according to Broughton (2023), the combined cost of constructing and renovating sports facilities in the United States and Canada combined was projected to be just over $4 billion in 2023.

Fans are no longer passive observers. They actively participate, analyze, critique, deconstruct, fantasize, and engage with their favorite players and teams in real-time (Grüttner, 2019). The shift from passive to active engagement is mainly driven by the

convenience and accessibility of a range of tools like athlete performance analytics and has fundamentally changed the way fans interact with the sports world. For organizations, this means adapting to meet fans' evolving expectations. To offer an exceptional, end-to-end experience, sports organizations must now consider every aspect of fan interaction—both online and offline—ensuring a seamless, connected experience at every touchpoint (Magdis et al., 2015). After all, as Standaert and others (2021) noted, sports event organizers no longer only compete among each other or other sports types, but the entire entertainment sector including platforms like Netflix and Spotify due to the increased commercialization and internationalization of sports. Increased presence in digital space leads to shift in understanding of the concept of fandom. Engagement can now go entirely through digital means. We expect the traditional fans to watch the whole game on TV or live in the stadium. But a fan can also be a fan with only watching highlights, buying jerseys, or playing video games (Maese, 2020).

Physical and digital involvement are therefore blending. The experience for sports enthusiasts has significantly enhanced over the past years due to notable technological advancements. According to Capgemini's 2023 report, %69 of fans, especially younger generations, show a preference for watching sports away from the venue. This trend is stronger in Australia and the United Kingdom, while it's less strong in France and Germany. Sport consumption is largely dominated by smart devices, streaming services, and social media. Altman Solo's 2023 Global Sports Survey reveals that worldwide fans across all age groups are engaging in other digital media while watching sports - %57 surf the internet, %50 use social media, and %43 are messaging. Young fans in comparison to older ones spend 1.5 times more hours online. This is sending a message for sport-related businesses to deliver multi-platform content. Technology is seen as a key competitive advantage for sports professionals. %78,4 of sports organizations are expected to increase their financial commitment to digital transformation (PwC, 2020).

2.3.1 Market and Opportunities

Sport is managed as a business. It is operated in a way that the profits are maximized. This means all processes from training, organization, and sponsorship deals, need to be managed well and long-term returns must be assured (Zimbalist, 2003). "As long as there have been professional sports, there have been investors motivated by profits…" (Rosner & Shropshire, 2011, p. xi). For investors, the sports industry is an attractive market. According to Statista (2023a), global revenue reached $486,61 billion in 2022. They estimated this number to grow to $623,63 billion in 2027.

For AT Kearney's 2014 sports report, Collignon and Sultan developed a sports ecosystem based on money flow, see Figure 3. They analyzed five essential elements that generate revenue for a sports club: fans (through ticketing and merchandising), media (through TV rights), leagues (through revenue distribution), brands (through sponsoring), and other clubs

(through transfer fees). Fans are an essential element for securing revenue for sports clubs. Their expenditure consists of: (i) tickets and merchandising, that go directly to clubs, (ii) tickets, that go to leagues and then to clubs through revenue distribution, and (iii) subscriptions, that go to leagues through TV rights.

Collignon and Sultan also identified three indicators that protect and increase club revenues:

1. Team performance, that generates media revenues through interest generated by winning;
2. Presence of star players, that attract sponsorships, and increase sales of tickets and merchandise;
3. Loyalty, which is linked to ticketing revenues.

While ticketing represented %90 of the club's turnover in the 1980s, it currently accounts for between %15 and %20 (Previati, 2020). The Future of Sports (2015) argues that demand for game tickets is inelastic, which means the demand is not heavily influenced by changes in price. Increasing ticket prices is therefore unlikely to have a substantial impact on overall revenues. Team sports products have limited substitutes, and the correlation between the renewal of season tickets and the income of fans is minimal, indicating that the decision to spend on game tickets is not solely dependent on income levels.

Figure 3: The Sports Ecosystem: The Flow of the Money
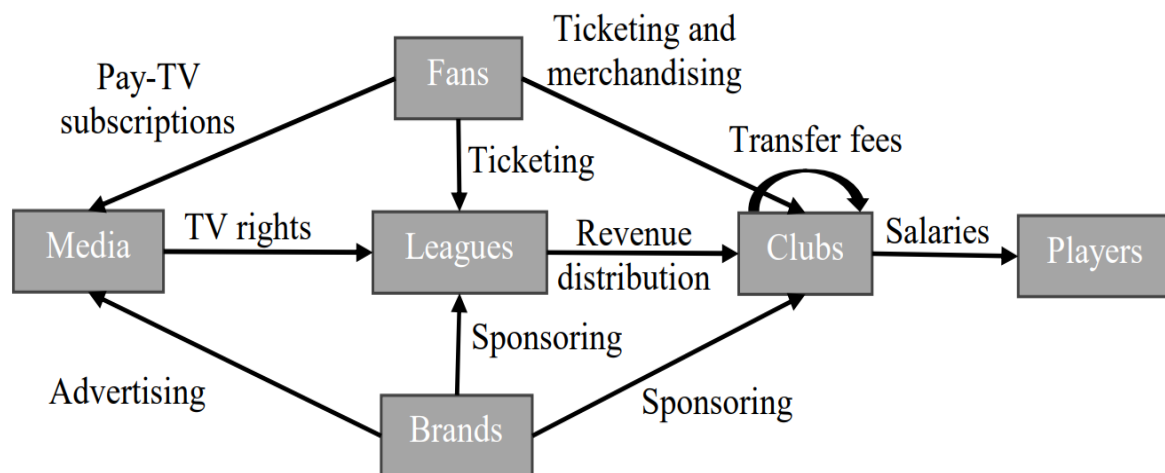
Source: Collignon & Sultan (2014).

Revenue opportunities go beyond playing field-generated revenues and in-game sponsorships (Milner, 2023), given that %67 of total ad revenue worldwide in 2022 was from digital advertising. Projections indicate a further increase, reaching %73 by 2028 (Statista, 2023b). Digital presence has many benefits. It empowers and facilitates opportunities for digital data collection. Collected data can be used for more precise fan segmentation and analysis of their behavior. Obtained insights indicate the priorities of the

most valuable customers. Consequently, data-driven strategies, and more inclusive and personalized digital content can be generated (De Caigny, 2023; Milner, 2023; Seen, 2023).

Like in every industry this day, a lot of opportunities persist in exploring Artificial Intelligence (AI) possibilities. On one hand, for improvement and enhancement of internal processes that relate to fan engagement. Digital data like social media content can be used for more than just direct engagement with fans. It can be used for evaluation of this engagement with AI-based technologies like text mining and sentiment analysis. Textual posts, hashtags, and comment sections can be examined. Using this model, data can be understood more effectively and efficiently, resulting in enhanced fan engagement at scale without incurring additional costs (Zadeh, 2021). AI tools can also be utilized for the detection, identification, and classification of specific acts or matters within sports events, enhancing personalized game summarization, video clipping, or highlight creation (Midoglu et al., 2024). On the other hand, AI technologies can be integrated into existing fan engagement platforms, such as social media content or broadcasting, to enhance personalization and deepen fan interaction. Furthermore, it is opening new engagement channels, such as Augmented Reality (AR), Virtual Reality (VR), and metaverse, which will be explored in the following chapters.

2.3.2   Generational Differences

Researchers categorize demographics into groups for more efficient documentation of differences and definitions of key issues. This facilitates an improved understanding of their characteristics and lifecycle milestones. Specific context shapes a group's attitudes, beliefs, and behaviors within the respected category. Segmentation enables more comprehensive analysis (Dimock, 2019). There are many differences in definitions of generations across academia. However, they are minor and not crucial for this thesis. For demonstrational purposes of generations, Table 2 presents a classification of generations as per Serinikli (2019). It exhibits the birth years of respective generations and their key characteristics.

Sports event organizers and sports business owners are concerned about the last two generations – Gen Z and Gen Alpha, because they're different. They're not the traditional TV viewers, they have different digital habits and they are less and less participative in sports. There is a positive correlation between being engaged in sports and developing fan loyalty among the youth. Therefore, youngsters, that actively participate in sports are more likely to become sports fans. But the number of young sports enthusiasts is decreasing. While it was inevitable for kids to engage and participate in sports, today's kids on average spend less than three years playing sports, and the majority of them drop the activity by age eleven (Solomon, 2019).

Silverman (2020) reports that individuals from the Gen Z generation are only half as inclined as Millennials to regularly watch live sports. Furthermore, they are twice as prone to never watching sports regularly. Esports garner more popularity among Gen Z than MLB,

NASCAR, and the NHL. Today, younger fans devote more time and attention to other sport content over watching the actual game or match. They see watching a game as an opportunity for a broader social outing, where watching a whole game is not a central part. The fact that the focus and quality of experience are diverging away from the court contradicts traditional logic (Morton, 2021). Young fans exhibit a greater demand for entertainment experiences as they anticipate personalized value propositions. This includes behind-the-scenes content and documentaries. They are less inclined to watch an entire event and show a preference for short content that is easier to consume. However, this doesn't imply youth's attention span is shorter. Their research shows youth is still willing to devote substantial time, but when provided frequent opportunities to interact. Therefore, they require different styles of communication (Nielsen Sports, 2019). According to ESPN's internal data, %96 of 12 – 17-year-old individuals still consider themselves sports fans. Nevertheless, there's a drop in emotional involvement, as the number of young individuals who consider themselves avid sports fans decreased from %42 to %34 in comparison to the previous decade (Maese, 2020).

Table 2: Demographics Segmentation

Generation	Born [year]	Age in 2024 [years]	Key characteristics
The Silent Generation	1900-1945	79-124	Respect, loyalty, acknowledge authority
Baby Boomers	1946-1964	60-78	Socially conscious, work is a duty, lack of technical skills
Gen X	1965-1979	45-59	High business motivation, individualistic, use of technology
Gen Y (Millennials)	1980-1999	25-44	Tech-savvy, value freedom, and skeptical of authority
Gen Z	2000-2010	14-24	Digital natives, innovative, quiet (communication over media)
Gen Alpha	2011+	0-13	Technology integrated from birth, global citizens, early adapters

Source: Serinikli (2019).

For decades, sports have served as a foundational pillar of the television industry (Hutchins et al., 2019). Nevertheless, 19 out of 20 events on the Top 20 list of most watched telecasts by average viewership are Super Bowls (Nielsen, 2024). On one hand, the number of worldwide TV viewers is continuously increasing. In 2024, 5.51 billion people will be watching TV, while the crowd will grow to 5.7 billion by 2028 (Statista, 2023c). On the other hand, TV lost its position as the first screen (Evens, 2017) and the average time spent watching linear TV has continuously decreased since 2020 (Statista, 2023d). According to a recent Nielsen report (2023a; 2024), there has been a consistent downturn in conventional TV broadcasting viewership, coupled with a corresponding increase in streaming consumption, where streaming is defined as the delivery of audio and video content to any device via the internet. In July 2023, streaming activities (YouTube, Netflix, Hulu, Amazon Prime Video, Disney +, and others) constituted %38.7 of total TV usage. Over-the-top (OTT;

delivering content over internet to any device) and Connected TV (CTV; streaming internet content onto a television screen) are therefore gaining popularity. One of the indicators of CTV's growing influence is the design of modern TV remote controllers, that are now equipped with buttons dedicated to leading CTV platforms, such as Netflix, Hulu, and Disney+ or Sling, as shown in Figure 4. That was not unnoticed, as big players like Apple, Amazon, Disney, YouTube, and Warner Bros are massively investing in buying sports streaming rights (Clark, 2023).

Figure 4: Present Day TV Remote Control with CTV Predisposition

Source: Own work.

2.3.3   Goals of Digital Fan Engagement

Throughout the research for the thesis, different goals of digital fan engagement have been identified. According to the insights obtained from academic studies and papers (Abeza, 2023; Barve, 2023; McHugh & Krieg, 2021; Kraus et al., 2021), from the experts consulted

with for the thesis (Žitnik in interview, 2024; McLaughlin in e-mail conversation, 2024; Matjašec an interview, 2024), from official websites of major sport leagues like NBA, NFL, MLB, NHL, WNBA, FIFA, and from sport media articles that report news and interviews with major league executives (Maese, 2020; Makers, 2015; Johan Cruyff Institute, 2021; Fowler et al., 2023) the main goals of (digital) fan engagement can be summarized to: revenue growth, remaining competitive, acquisition of first-party data, promoting brand equity, transitioning from local to global and engaging with the youth. Specific goals differ depending on the individual sport, project, or campaign, as they might be targeting a particular age group or audience of predefined geolocation.

User Acquisition with Focus on the Youth

As discussed, there is a shift in conventional patterns of sport consumption. Consequently, fan engagement initiatives frequently target and prioritize the youth. Tim Ellis, the NFL's chief marketing officer, emphasizes the significance of acquiring young fans for the league's long-term sustainability. Based on the league's data, he states individual fan needs to be cultivated by the age of 18, otherwise, there is a risk of permanent disengagement. Similarly, Kate Jhaveri, the NBA's chief marketing officer, recognizes the importance of attracting Gen Z's attention (Maese, 2020). Neglecting the captivation of youth won't have an immediate effect, but will indicate the organization's future success. The trajectory of sports fandom therefore depends on the ability of clubs to engage the youth (Giorgio et al., 2023). Numerous personalized and interconnected campaigns that utilize technology are chasing this objective. Examples include Machester City's partnership with Sony and HawkEye for the development of a football stadium within the metaverse or the NBA's partnership with Google Pixel, providing a 3D game day experience (Draper, 2023).

User Retention and Loyalty

Fan retention and fan loyalty are related, yet distinct concepts that lay under active fan engagement. While retention is concerned with maintaining ongoing engagement, loyalty fosters deep emotional connection. Organizations strive for both objectives to maximize the relationships and achieve a strategic edge. Team loyalty in particular is positively correlated to fan consumption. It fosters a connection with the club as a brand, motivating individuals to acquire the club's products and services. Committed sports fans invest both financially and emotionally, representing the club's long-term growth strategy. This practice is widespread across successful professional sports leagues globally, where clubs sustain economic growth on the wings of strong fan engagement. Engaged fans actively seek opportunities to attend games and participate in unique activities like meet and greet with players of their favorite clubs. They show less price sensitivity and are more likely to make frequent and continued purchases of club products, such as tickets, apparel, and merchandise, because the expenditure of engaged fans is seen as a means to support the team, rather than a transaction for a product or service (Dionisio et al., 2008; Stander & De Beer, 2016; Da Silva & Las Casas, 2017; McHugh & Krieg, 2021; Previati, 2020; Cutait, 2023).

On that note, Zorfas and Leemon (2016) argue that emotional connection matters more than customer satisfaction. Consumers with an emotional connection to the brand have %306 higher lifetime value than "only" satisfied consumers (Azizan & Yusr, 2019). By connecting emotionally Zorfas and Leemon mean fulfilling customers' emotional needs, which are often unexpressed. According to their research, the most significant emotional motivators that influence consumer behavior are: standing out from the crowd, having confidence in the future, enjoying a sense of well-being, feeling a sense of freedom, feeling a sense of thrill, feeling a sense of belonging, protecting the environment, being the person they want to be, feeling secure and succeeding in life (p. 3). The authors state that organizations implementing strategies that aim to increase customers' emotional connection encounter a positive influence on financial outcomes. Although it seems like many organizations in various industries find it challenging to identify and harness the impact of emotions on customer behavior, the study of sports fans' behaviors has been an extensively explored topic in the field of sports management research (Mastromartino & Zhang, 2020).

Socialization

Sports viewing is becoming more and more social. While older generations show a preference for minimal interaction during the game, younger generations show little interest in watching a game alone or without interactions (Deutsch et al., 2019). The unique ability of sports to bring people together in real-time serves as the foundation for community-building (Makers, 2015), as socialization among fellow fans fosters a sense of belonging (Mastromartino et al., 2019). Similarly, Žitnik (in interview 2024), mentions socialization as one of the main drivers of fan engagement, be it on- or offline. He states: "I would say that some degree of socialization is necessary for every aspect. Everyone likes to share their opinion. Being a part of a broader story evokes positive feelings." In an interview for Johan Cruyff Institute (2021), Ruy Biscaia, a fan engagement researcher, even goes a step further by stating that the purpose of fan engagement itself is fostering a connection among fans and promoting a sense of community. In his opinion, the idea should be to provide a platform that provides a two-way dialogue, enabling fans not only to engage with their favorite teams or individuals but also with each other. He identifies technology as a main driver of resizing fan engagement, as it opens new contact points and empowers fans by giving them a voice.

2.3.4   Digital Fan Engagement Channels

Even though watching sports live in a stadium is (Giorgio et al., 2023) and should remain the most important driver for sports event organizers (Makers, 2015), there are other different ways for organizations to engage with their fans over digital media. It enables sports organizations to engage with fans off-stadium and/or on non-match days (Fowler et al., 2016). Traditionally, watching games over pay TV used to be the first and second option. However, it is losing importance. Event organizers therefore seek new and innovative ways to connect to their fans, where technology plays a central role. Sports organizations leverage

various channels beyond the ones described in the subchapters below, such as podcasts, Non-Fungible Tokens (NFT), and other digitally collectible assets.

Streaming and Broadcasting

Terms streaming and broadcasting both describe means to distribute audio or video content and represent the most common means of digital sports consumption. They contribute to more than %33 of overall sports league revenues. Therefore, streaming and broadcasting are important firstly, as a source of income, and secondly, as a channel for content distribution to a large audience. Nevertheless, broadcasting is losing its dominating position against streaming, as consumers are becoming less reliant on fixed broadcast schedules and more on streaming's convenience of flexibility. The shift is evident across all age groups (Deutsch et al., 2019). Video content, be it live or not, is seen as the most important format of content (Fowler et al., 2023). As discussed, streaming seems to be the leading trend for the future. Consequently, leagues and other sports event organizers are adapting their media strategies. %84 report the incorporation of streaming options into their plans (Nielsen, 2023b). Furthermore, streaming platforms offer opportunities for less popular sports and leagues to gain visibility and reach audiences that might not have been accessible through traditional linear broadcasters. With the flexibility of streaming, niche sports can carve out their own space in the media landscape (Pegoraro et al., 2021). Lately, there has been a noticeable surge in the popularity of so-called social live-streaming platforms (e.g. Twitch). It revolves around the concept of co-creating experiences, fostering collective creation, and encouraging platform engagement within the sports-viewing ecosystem. Eminent for its interactivity and immediacy, social live streaming offers a dynamic way for audiences to engage with sports content. Unlike traditional broadcasting and streaming platforms, it allows viewers to actively participate rather than passively observe. People no longer simply want to consume content – they seek active involvement, expressing their opinions, engaging in synchronous chats, sending messages, emojis, and virtual gifts, participating in polls, and observing real-life reactions (Qian & Seifried, 2023; Qian, 2022).

Social Media

Social media is a common name for tools, applications, and platforms that enable collaboration, communication, and connection among its users. Apart from socialization, its importance in digital fan engagement lies in its ability to reach diverse audiences, regardless of their age, sex, location, or religion (Romero-Jara, 2023), including Gen Z and Generation Alpha, that sports organizations primarily want to address. According to Giorgio and his colleagues (2023), almost all Gen Z sports fans consume sport-related content over social media. They even utilize social media when watching the game either live or at home. Lim and others (2015) noted the importance of real-time interaction, encompassing the sharing of fan's own opinions and emotional reactions, as well as receiving and engaging with others. Barve (2023) mentions two other important aspects of social media in fan engagement: facilitating direct communication channels that enable a two-way dialogue

between fans and sports organizations or athletes, and providing valuable insights into fan behavior through social media analytics. Nevertheless, the success of engagement on social media heavily depends on the selection of the platform, the nature of the content, and its format (Romero-Jara, 2023). Harnessing the power of social media also entails building athletes' brands by offering behind-the-scenes content and glimpses into athlete's everyday life (Park et al., 2020).

Fan Apps

Fan apps are developed to incorporate features that allow fans to express their loyalty and affiliation with the sports team. The features and the offering are usually tailored to individual specific needs that are in line with the sports organization's strategy. It is suggested that the app is visually appealing, and valuable, that it includes product-related attributes (e.g. information about team members, team performance, team coach, etc.), non-product related attributes (e.g. team's location, information about the team's history, team owner, etc.) and brand associative attributes (e.g. information regarding stadium, cheerleaders, etc.) to enhance brand recognition. Neglecting the inclusion of user-generated content and the absence of fan profile creation can represent a missed opportunity for fan database construction, which can be utilized for fan profiling and more personalized content creation. Additionally, the introduction of fan rewards shall be considered, where fan badges or other digitally collectible assets can be awarded for fan loyalty. Integrating these elements can further enrich the app experience, fostering deeper engagement and connection between fans and sports organizations (Watkins et al, 2014). The decision to adopt such apps is driven by factors such as access to team and game-related content, opportunities for fan interactions, and boosting game enjoyment. Conversely, it is important to be aware of risks such as distraction from the game, a decline in the live atmosphere, social risks, data security, and privacy issues (Uhrich, 2022).

Gamification, eSports, and Fantasy Sports

Advancements in technology have led to the emergence of novel methods for engagement. One prominent development in this realm is gamification, defined as the practice of engaging fans within non-game contexts using game-like features and elements (Buser et al., 2017) such as difficulty levels, progress bars, rankings, achieving objectives and awards or creating avatars (Bitrián et al., 2020). Utilization of such features is advantageous especially in passive situations, making them more engaging and pleasurable. In the context of sports, gamification can be utilized to escalate engagement by increasing fan involvement and simulating participation. Examples include interactive layers over match video or awarding digitally collectible assets for accurate score predictions (Quillot et al., 2020).

Electronic sport (a.k.a. eSport) on the other hand, refers to the consolidation of gaming and competitive sport, therefore competitive gaming and video gaming tournaments. The industry has been growing ever since 1990 and has seen an additional boost in the COVID-

19 pandemic. Scholars are debating its classification as a sport, leading to ongoing ambiguity surrounding its categorization (Riatti & Thiel, 2022). Anyhow, its audience is continuously growing and is expected to reach up to 318 million fans worldwide by 2025 (Statista, 2022a). The most-watched eSport event in 2023 was the League of Legends World Championship with 6.4 million viewers (Statista, 2023e). This is still considerably less than the 2023 Super Bowl (NFL's final event, most watched sports event in the US) with 115 million viewers only in the US (Statista, 2024b), but not insignificantly low. Esports global revenue was estimated to be $1.38 billion in 2022, with China and North America being the largest markets (Statista, 2022b).

Fantasy Sports are the intersection between sports and eSports. Fantasy They enable participants to put on the shoes of professional sports team owners, managers, and coaches by selecting and managing a team of real players. They take on the reins of processes such as drafting, trading players, and setting lineups. The score of a fantasy game then depends on the players' real-life performance. It started in the US in the 1980s for baseball but went through a revolution with the introduction of the internet. Today, it is mainly played online and has been adopted by other sports leagues (Davis & Duncan, 2006). Sports league organizations encourage it especially due to the simplicity of the transition from fantasy sports fans to sports fans and vice versa. According to Karg and McDonald's study (2011) fantasy sport payers score significantly higher in metrics like team identification, loyalty, game attendance, TV viewing, and secondary spending, compared to non-fantasy sport fans. It also serves as a knowledge generation hub and facilitates socialization among players.

Metaverse

Hadi et al (2024) define the metaverse as "a network of digitally mediated spaces that immerses users in shared, real-time experiences" (p. 2). It is a space that enables the simultaneous presence of users through their digital portrayal called avatars. The Foundation of Metaverse is AI. It is required for the perception of humans, space, speech, and decision-making. Metaverse has various applications based on service delivery type and generally consists of four pillars: AR, Lifelogging (LL), Mirror Worlds (MW), and VR. AR provides users overlying view of physical reality with virtual items. It requires the utilization of AR-capable devices such as phones or headsets. Examples include social media filters or Pokémon Go mobile games. LL denotes virtual life documentation through real-world identity that is subjective, more personal, and does not include simulations. An example is a social media feed. MW denotes the creation of the real world's digital twins, mimicking physical spaces or processes, where avatars typically present real selves and interactions are real-live. Examples include Uber, Zoom meetings, or in-app food ordering. VR is relationship-centric and denotes live interaction within a digitally constructed reality (Bolger, 2021; Kim & Kim, 2024). Figure 5 presents a visual representation of VR.

The emergence of the metaverse is revolutionizing how sports fans engage with leagues, teams, and athletes, be it by expressing their fandom or consumption of sports content. It is

community-driven and is not restricted to geographical location. Fans can enjoy live games from the comfort of their home while keeping social interaction with other fans in the virtual stadium (Chohan & Schmidt-Devlin, 2024). Baker and colleagues (2022) suggest sports brands promote ownership of digital goods such as the personalization of fans' avatars with digital merchandise. This was confirmed with Capgemini's study (2023), where %66 of the population showed interest in purchasing digital merchandise. Even though the introduction of Apple's Vision Pro VR headset in 2024 simulated the launch of many exciting applications in sports particularly (Baek, 2024), user metaverse adoption seems to be slower than expected. Many tech giants like Meta (former Facebook), Microsoft, and Disney, who have invested billions in their metaverse projects, are now downsizing them due to financial losses (Ngila, 2023). Additionally, Chohan and Schmidt-Devlin (2024) point out the lack of regulations that might lead to negative interactions and value volatility of digitally collectible assets, obtained within the metaverse.

Figure 5: Digital Innovations in Fan Engagement

Source: LiveLikeVR (2015).

Sports Betting

Sports betting entails the act of placing bets on the final result and specific components of sporting events (Hing et al, 2015). It encompasses financial incentives, interpersonal interactions, and entertainment, fostering opportunities to socialize, celebrate, and sympathize. There has been a rapid expansion of sports betting globally, particularly in the

past 25 years. The main factors contributing to the expansion are the liberalization of regulations on key markets, expansion of digital platforms, and convenience of reaching them. In the 2000s, with the rise of the internet, traditional bookmakers migrated to online environments. This shift not only made sports betting more convenient but also introduced new betting options, evolving from pre-match to real-time live betting. Even though sports betting often evokes negative connotations, researchers find a positive correlation between sports betting and the enjoyment of watching a sports event. Betting enthusiasts tend to consume more sports-related content than non-bettors. Fans who bet also report higher interest in sports as well as increased engagement. Additionally, sports betting has proven to be a powerful tool for attracting larger audiences, thereby boosting viewership and amplifying the popularity of sports. Sports betting platforms and sponsorships are also integral to the financial ecosystem of modern sports (Russell et al., 2019; Turcu et al., 2020; Dwyer et al., 2024). Žitnik (in an interview, 2024) points out another significant aspect – the promotion of fair sports. Betting imposes regulations and oversight mechanisms that eradicate the black market and promote clean sports.

2.3.5 Digital Transformation and Structural Changes

Digital fan engagement is emerging as a trigger for digital transformation within sports organizations. As they adopt digital strategies to connect with their audiences, they are compelled to undergo significant internal changes, driving organizations to rethink their structures, processes, and resource allocation. Although there are many existing definitions of the term digital transformation, the working definition for this thesis is taken from Fitzgerald and his colleagues (2014). In their work, they describe digital transformation as the "use of new digital technologies (social media, mobile, analytics or embedded devices) to enable major business improvements (such as enhancing customer experience, streamlining operations or creating new business models)" (p. 2).

Chamorro-Premuzic (2021) points out organizations have to understand the definition and vision of digital transformation when adopting it. He explains that transformation doesn't simply mean swapping old technologies for new ones, accumulating data, and employing a team of data scientists. The potential of new technology might be untapped, when the processes, corporate culture, and employees' skills aren't appropriate. Therefore, the true core of digital transformation is not the "digital", but rather the "transformation" part. Companies need to reconstruct their approach to delivering value. Actual transformation occurs when changes are initiated at the company's structural level. Goals, policies, and allocation of resources need to be adjusted and managed strategically. Oftentimes, technology is prioritized rather than the required organizational change. Successful transformations consist of a well-defined strategy, senior management committed to change, actively engaged employees, and prioritization of adaptation (Schwertner, 2021).

Similarly, sports organizations' adoption of digital fan engagement tools and strategies are labelled as digital transformation and has an impact on the organization's internal structure. According to Žitnik (interview, 2024), the implementation of such solutions shall primarily seek a smooth integration, at least at the beginning. He states that the extent of changes is correlated to the value it brings to the sports organization. Therefore, the more the value the sports club, federation, or league perceives in the solution, the greater the inclination towards structural change, with the reference point of individual organization also being one of the underlying factors.

2.3.6   Current and Anticipated Challenges

Immediate and long-term issues with technological, social, and environmental dimensions may influence the development and sustainability of sports fan engagement and its digitalization.

Fragmentation and Oversupply

Experts are pointing out an oversupply across the sports sector. The fragmentation of apps and streaming rights affects the fans. Altman Solon 2023 Global Sports Media Survey reveals that %59 of global sports fans have trouble finding sports content or afford it. %56 express willingness to watch more sports video content if it were available. %35 of fans who have trouble accessing live sports content say it's overpriced, %30 struggle with channel selection, and %28 encounter platform navigation challenges. Therefore, fans seem to crave more content but are facing accessibility issues. Countering this problem, the report suggests industry consolidation through audience aggregation and content democratization. Surveying global sports media executives revealed they in fact do advocate for content aggregation (%65), content promotion (%64), and flexible pricing (%58). They see these actions as a means to support global accessibility. Executives also observe a shift in fan behavior from rigid team loyalty towards a more fluid and athlete-centric fandom.

Žitnik (in interview, 2024) noted that fragmentation and consolidation come in waves. Currently, the sports industry is experiencing a consolidation phase, driven by an oversupply of apps and the challenge of attracting users. In the entertainment sector, he predicts a trend towards consolidation, envisioning apps offering a multitude of services within a single platform, referring to WeChat and X (former Twitter) initiative. He provides a successful consolidation example of PlayStation's FIFA, which integrated betting options into the game. Mike Mulvihill, head of strategy and analytics at Fox Sports, notices an oversupply of premium events. He believes this is one of the major reasons why big sports events are continuously struggling with keeping the rates high, stating: "It's causing the total pool [of consumption] to not be affected that much. But on a sport-by-sport basis, everyone suffers." (Strauss, 2020). For similar reasons, Jorge Sousa, Managing Director of Eleven Sports Portugal, advocates for collaboration among broadcasters. He points out the problem of simultaneous scheduling of multiple games, especially on Sundays (Hickey, 2022).

In sports streaming, consolidation actually began. In February 2024 the new joint venture of ESPN, FOX, and Warner Bros has been announced. Each stakeholder holds one-third of the venture, which is under an independent management team. The plan is to launch a new standalone app in the fall of 2024. They are promising that the app will include content from major leagues like NFL, NBA, WNBA, MLB, NHL, NASCAR, College Sports, UFC, PGA TOUR Golf, Grand Slam Tennis, the FIFA World Cup, Cycling, and others. The creation of such a platform aims to provide diverse sports content for all fans, even those without traditional pay TV. The consolidation benefits from economies of scale, amount of content, competitiveness against big players, and improved technology for better viewing experiences (Disney, 2024).

Authenticity, Privacy, and Security

Authenticity is crucial for building genuine fan connections. The presence of spam accounts poses a potential threat to authentic fan engagement. It encompasses two elements, source-authenticity and message-authenticity, that are not interchangeable. They refer to distinct aspects of authenticity – one refers to the origin of information (source authenticity) while the other refers to the integrity of the information (message authenticity). The term "fake news" spread due to the lack of authenticity of online information. With the growing presence of AI-generated content, this matter has to be considered (Jacobs, 2024). There are more regulations on the data protection side, especially with the enforcement of the General Data Protection Regulation (GDPR) in May 2018. In the fan engagement realm, it regards the privacy of data subjects, thus fans. Sports organizations must adhere to these regulations when handling fan data. Such regulations have significant implications for the responsibilities of sports clubs and federations, as well as the fan engagement tools providers, regarding the use of fans' personal data. An organization where the breach of data protection rules and regulations is identified can be fined up to €10 million or %2 of the global revenue of the previous financial year (Kedzior, 2017; Wolford, n.d.).

Digital and Social Exclusion

According to Helsper and Eynon (2013), a great share of research proved the link between social exclusion and digital engagement. They identified sociodemographic background and Information and Communication Technology (ICT) skills as the main factors contributing to the amount of activities the population takes online. Individuals with limited socioeconomic resources (education, income, health) are inclined to engage digitally. Furthermore, the adoption of ICT has a positive influence on Quality of Life (QOL), especially for older people (Damant et al., 2016). Individuals with digital inclusion can access services that positively influence their health, employment, education, and housing situation. However, access to digital infrastructure is meaningless without digital literacy. That's why both the public and private sectors should opt for digital inclusion policies to address societal disparities for both accessing and utilizing Information Technology (IT) and consequently enhancing QOL. Individuals facing disadvantages related to age, gender,

ethnicity, geolocation, or disability shouldn't be excluded from accessing and advantaging from the information society. Otherwise, we will face new forms of social segregation with social exclusion for the digitally excluded. The author even argues that access and use of ICT should be acknowledged as a civil right (Ragnedda, 2023).

Digital disengagement can originate from intentional or unintentional choices. On one hand, unintentional factors influencing digital engagement are for example limited income and inadequate infrastructure access. On the other hand, the phenomenon when people who could use technology, but choose not to, is called "digital choice". As there is a correlation between social and digital exclusion, there are different possible scenarios. In the most positive one, authors expect the social exclusion to get smaller over time because the ability to access technology will improve for deprived individuals. Others argue that the maximum uptake of less privileged groups can increase only as much as it rises for the privileged group. Therefore, the gap will remain the same over time. In the third scenario, the difference between socially included and excluded rises over time, because socially included are already benefiting more from technology access. They understand it better and can use it more efficiently (Helsper & Galácz, 2009).

Environmental Impact of Big Data and Dark Data

One of the major assets of digital transformation is data (Bounfour, 2016), as one of the primary drivers is to collect data on a large scale and extract knowledge (Kostakis & Kargas, 2021). Turning data into insights is highly desirable, but at what cost? A working definition of big data for this section is taken from Etzion and Aragon-Correa (2016). In their definition, the difference between traditional and big data is not that the big data is "big", but that it is unique in four "V" dimensions: volume, velocity, variety, and veracity. Big data therefore embodies data, that might be heterogeneous and comes from different sources with various levels of integrity.

More data doesn't automatically lead to better decisions. Firstly, there is a threat of bias due to the cognitive burden associated with the volume of big data. Secondly, data variety leads to objections in decision-making (Corbett, 2018). And thirdly, there is a threat of what academics call dark data. Dark data is data that is collected but not stored and indexed thoughtfully. It is invisible to data scientists and therefore remains unutilized for other purposes (e.g. analytics) (Heidorn, 2008). Lucivero (2020) is critical of the trend where digitalization is seen as a means towards sustainability imposed by the United Nations and the European Union. She states that the ICT industry, emerging data centers to store big data, and cloud computing, as a foundation of big data, are leaving a significant carbon footprint and substantially consume non-renewable energy. In her opinion, recent literature on the ethics of big data addresses mainly questions regarding data protection, data ownership, inequality of data access among countries, et sim., but lacks the addressing of environmental concerns. To mitigate the negative impact of data storage on the environment, she suggests devoting greater attention to the assessment of data initiatives.

Data centers and high-performance computing facilities are heavily resource-consuming. While data centers alone contribute to %0.3 of global carbon emissions, the ICT sector as a whole accounts for more than %2. It is estimated that data centers consume 200 terawatt hours of energy per year, which is more than the whole country of Iran (Jones, 2018), which had nearly 88 million inhabitants in 2021 according to The World Bank (n.d.). Data centers also annually produce 100 megatons of CO_2 emissions, which is comparable to the annual pollution of American commercial aviation (Lannelongue et al., 2021). Research by Andrae and Edler (2015) revealed that in a worst-case scenario, the ICT sector could consume up to %51 of global electricity and contribute up to %23 of global gas emissions in 2030. This scenario could unfold if there is insufficient progress in enhancing the electricity efficiency of both wireless access networks and fixed access networks or data centers. The severity and seriousness of the problem were also discovered by researchers at the University of Massachusetts. According to their work, emissions of the total life cycle of an average American car, including its manufacturing and lifetime fuel consumption, represent only a fifth of carbon emissions compared to training a single Natural Language Processing (NLP) AI model. Authors also point out that training a single model is a bare minimum, as in practice there are many rounds of training and tuning (Hao, 2019).

Overall, the data is the new oil analogy seems to be accurate on more than one level. Data, much like oil, can evolve into highly profitable operations as well as leave a significant environmental impact (Hao, 2019). Martin (2020) draws parallels between them in a frame of the importance of ethical sourcing. Just as ethical sourcing matters in exploiting oil resources, firms should ensure ethical data acquisition. Practices of obtaining oil are ethically questionable in many geographical areas, especially in countries with poor institutional frameworks, weak legal enforcement, and lack of regulations (Gupta, 2017). Similarly, we've faced some large unethical data abuses, the Cambridge Analytica scandal being one of them. In recent years, the European Union (EU) has imposed fines on companies over 1.400 times, amounting to nearly €3 billion, for breaches of the GDPR (Segalla & Rouzies, 2023).

3   EQUESTRIAN SPORT AND SHOWJUMPING DISCIPLINE

"No hour of life is wasted that is spent in the saddle" is a famous quote by Winston S. Churchill, that every horse lover can relate to. The role of horse in society has been changing throughout history. Some even say horses are one of the main forces that drove civilizations forward, in cultural and economic aspects (Wolframm, 2013). Ever since domesticated, about 3000 to 2500 B.C. (Lawrence, 1988), they enabled faster traveling and more efficient transportation service of goods. Horses were also an important factor in many wars. Ancient civilizations, old Greeks, Muslim armies, Middle Ages knights, Napoleon, and both World Wars all exploited horses for warfare purposes because of their strength, speed, endurance, and agility (McFadden, 2022). In the 1900s with the automobile boom and technological advancements, horses started to be replaced by mechanical solutions. They were slowly

pushed out of the cities. With the mechanization of agriculture and transportation, even from farms and mines. Smith and Browne (n.d.) reveal that 13.800 companies in the US were building horse carriages in 1890. Thirty years later, only 90 equivalent companies persisted. Figure 6 demonstrates the drop in the number of horses and mules in the US between 1900 and 1960. By early 1970, it was even predicted we'd be seeing horses only in zoos (Haring, 2012). Today, third-world countries still use horses for transportation services, while equestrians have become an elite sport in the West. Adelman and Thompson (2017) point out that the interaction between humans and horses is historically constant. It is the type and the value of interaction that is varying.

Figure 6: U.S. Equine Population During Mechanization of Agriculture and Transportation
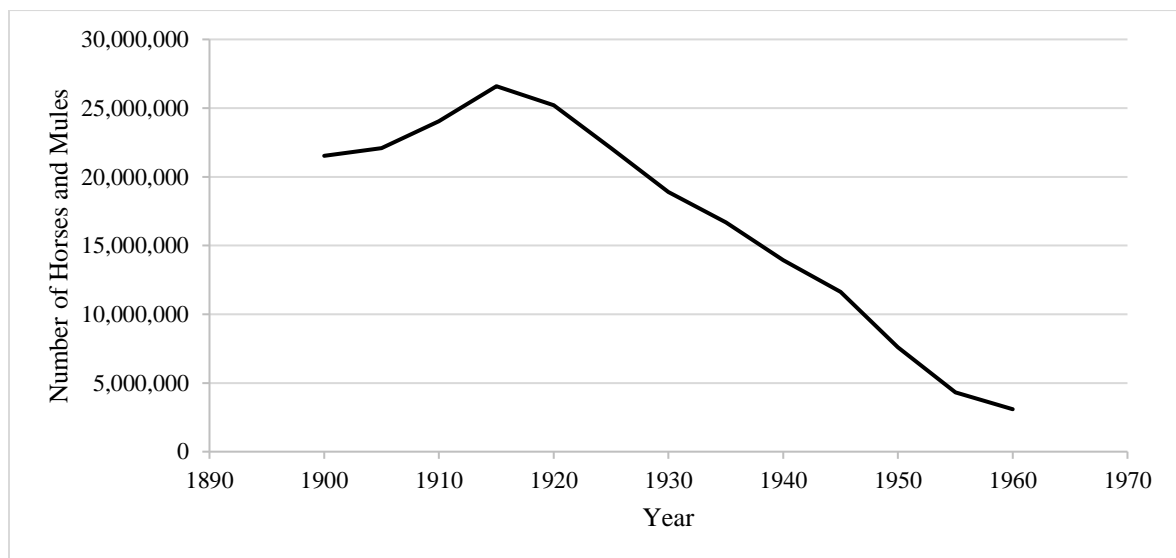
Source: Kilby (2007).

3.1   Equestrianism as a Sport

There are different contexts where human and horse develop a relationship. Police officer and police horse form a work colleague relationship. Doctor-patient relationship is formed in hippotherapy sessions. In equestrian sports, two athletes become partners. Although there are many English and Western riding styles and disciplines, FEI recognizes seven: showjumping, dressage, para dressage, eventing, driving, endurance and vaulting (FEI, 2023), three of them being Olympic.

Equestrianism is about pairing two sportsmen, a human, and a horse, which need to team up, act synchronized and response to stimulus from another (Ničková & Bartošová, 2022). Competitive aspect of the partnership between a man and a horse goes way back. Equestrian event was among eight disciplines of ancient Greek Olympics organized around 3.000 years ago in Peloponnese, next to discus throw, long jump, javelin throw, running events, boxing,

wrestling and pankration. There were three equestrian disciplines in frame of equestrian event: horse riding race, two-horse chariot, and four-horse chariot. The latter was the most popular one. One of the big distinctions was also that the winners of the events were the horse owners, and not the actual participants (The Olympic Museum, 2013). This may be attributed to the fact that chariots were extremely dangerous, causing loss of lives of many horsemen and horses (Olympics, n.d.), or the fact that chariot racers were frequently slaves (Crowther, 1992).

However, the pre-1900 equestrian events lacked governance and internationally standardized rules (De Haan & Dumbell, 2016). It was in 1900 Paris summer Olympics that equestrian was re-introduced to Olympic games after 2592 years (FEI, n.d.a). Then introduced disciplines were different from what we know today. Showjumping was divided into jumping, long jump and high jump, together with polo, that was a part of Olympic games only five times in Olympic history and is today known as discontinued sport (De Haan & Dumbell, 2016). Not included for the next two games, equestrian rejoined in 1912 for Stockholm summer Olympics together with three disciplines: showjumping, dressage and eventing. Those three disciplines are a part of Olympic games ever since (International Olympic Committee, 2017). Today, equestrian competitions are the only Olympic categories including animals. They are also the only Olympic disciplines without sex segregation between men and women. But it wasn't always like this.

Firstly, in 1900 Paris summer Olympic games, it was the only time that horses weren't the only participating animals. Although it wasn't listed as an official Olympic sport, live pigeon shooting was one of the events held. The goal was to shoot down the most birds. Fifty-four competitors killed nearly 300 pigeons in three days. The event was never brought back (Malesky, 2012; Wood, 2010). Modern versions called trap and skeet shooting are targeting clay objects (Lokegaonkar, 2023).

Secondly, until 1948, only men were admissible to compete in equestrian Olympic events. It was because only military officers were allowed to participate as riders. In 1951 this restriction was lifted, and women joined the 1952 Helsinki Summer Games (International Olympic Committee, 2017). Nevertheless, the International Olympic Committee itself had all men membership between the years 1896 and 1948 (De Haan & Dumbell, 2016). Today, women are dominating equestrianism numerically, but not at the top level (Dashper, 2012). In Olympic equestrianism men and women are competing together on equal terms, but there are more men than women. The number of female riders is increasing over time. The biggest share of female riders can be found in the dressage discipline (Hedenborg & White, 2012). Dashper (2012) explains equestrian sport requires balance, precision, and specialized training. Within the partnership of a horse, the horse is the stronger partner, so the strength of a rider has a less significant role. Therefore, there are no biophysical advantages for desired attributes for either gender connotation. Looking at the world ranking of the International Equestrian Federation (FEI), retrieving data on 13. 11. 2023, there is only one woman in the top 20 in showjumping discipline (FEI Database, 2023a), fifteen in dressage

discipline (FEI Database, 2023b), and eight in eventing discipline (FEI Database, 2023c). These figures indicate that sex integration doesn't directly lead to either equality or total exclusion of women.

Alike sex integration among riders, there is no sex segregation among horses in Olympic disciplines. There are many factors that influence the performance of the horse, and sex seems to be one of them. Maršálek, Sedlačková and Secká (2005) focused on showjumping discipline and analysed 1825 horses over 44 courses. Their findings suggest stallions perform better than mares or geldings. Mares are more likely to refuse to jump. Hanousek, Salavati and Dunkel (2020) focused on British eventing, studying the competition results between 2008 and 2018. According to their findings, gelding and stallions perform better than mares on all levels. On higher levels, performance of stallions tends to be rider specific. Spulber and Gîlcă (2020) investigated the dressage world championship for young horses in 2018. Their report suggests there are no significant statistical differences among mares, stallions and geldings. Pietrzak and others (2013) analysed results of international dressage competitions in years 2008 and 2009. They found out that the largest number of horses competing internationally were geldings, but mares performed best.

3.2   Showjumping Discipline

Showjumping is an Olympic sport and the most popular equestrian discipline, according to FEI. Federation describes it as a mix of courage, control, and technical ability. The goal of the discipline is to overcome a 10 – 15 obstacle course (FEI, n.d.b), as shown in exemplary Figure 7 below. The most common competitions are held under the rules of Table A (Article 236, Article 237, Article 238) and Table C (Article 239), as defined in the 27th edition of FEI Jumping Rules effective from January 2022. There are two types of competitions under Table A: competitions not against the clock and competitions against the clock, with variations of each type. In both cases, each knocked obstacle and first disobedience are penalized with four penalty points. Second disobedience means elimination. Exceeding the allowed time brings one penalty point for each exceeded second. In competitions not against the clock, penalty points are accumulated for every mistake. A course finished without penalty points is called a clear round. Riders with clear rounds qualify for the so-called jump-off, a second competition round with a reduced number of obstacles. A winner is a pair with the lowest number of penalty points and the fastest time in the jump-off. If there is only one contestant with a clear round, he is an automatic winner. If there are no clear rounds, there is no jump-off, and a winner is a pair with the lowest number of penalty points in the fastest time in the regular competition part. In competitions not against the clock, athletes with equal penalties are ranked by the time taken. In Table C, mistakes are penalized with seconds and are appended to the time taken for competitors to finish a course. Each knocked obstacle is penalized with four seconds. There is no penalty for first disobedience, second disobedience leads to elimination (Olympic Federation of Ireland, n.d.; FEI, 2022a).

Steinkraus (2013) explains showjumping became a global sport after World War II with the development of technologies in transportation and communication, supported by the growing role of corporate sponsorships.

Figure 7: Example of Showjumping Course

Source: Ramjoie (2023).

As in any other sport, the main goal is competition success which depends on many factors. They regard both a human and an animal. While some horses are more suitable for pleasure riding, others perform better in sport (Visser et al., 2003a). Study, (2003b) suggests there is a great significance of suitable physical abilities and personality traits of a horse that indicate excellence in showjumping. Traits like temperament, reactivity to humans, and learning ability, that influence performance, can be distinguished and predicted in a horse's early life. They also point out that the personality of horses is not emphasized enough. Rather than that, the performance of a horse is more often associated with its pedigree, and reasons for poor performance are usually searched for in clinical disorders. Chapard and others (2023) focused on the Belgian Warmblood horses breed in the showjumping discipline. They found out that horses, that are involved in early life jumping contests are performing significantly better in their later sports career than horses who are not. This implies that horses identified and invested in by breeders for early-age competitions are more likely to exhibit superior performance later on.

While maximum physical strength is doubted to be a key component in sports performance (Stone et al, 2002), it might be of even less importance for horse riders. When explaining

psychological terms id and ego, Freud (1957) used an analogy of a rider and a horse that explains well the role of a rider: » ... The ego's relation to the id might be compared with that of a rider to his horse. The horse supplies the locomotive energy, while the rider has the privilege of deciding on the goal and guiding the powerful animal's movement. But only too often there arises between the ego and the id the not precisely ideal situation of the rider being obliged to guide the horse along the path by which it wants to go. « (p. 69). Hall and her colleagues (2009) tested the visual memory of show-jumping riders. They discovered that better riders (intermediate and advanced level) remember relevant points of focus more than irrelevant points, which indicates that visual attention techniques could improve riding performance. Gathering data over showjumping course, Ille and others (2014) found no major differences in physical effort, stress response, and seat pressure between male and female riders nor how horses responded to male or female riders.

3.3   Equestrian Market Data

This section explores equestrian market data. The first part presents statistics according to FEI. The second part presents market data of best-performing countries as per Olympic success. The most successful countries historically are Germany and the United States of America (USA; for details see Appendix 2 and Appendix 3). Germany is the country with the most Olympic gold medals in showjumping as well as the most gold medals in showjumping, and the USA is second by the number of Olympic medals in showjumping and third by the number of gold medals in showjumping. Lists take a sum of individual and team medals.

To obtain the ranking of countries by the number of Olympic (gold) medals, data was obtained from the Olympic Games' official website (International Olympic Committee, n.d.). It was cleaned, prepared, and analyzed using the programming language Python. Data includes results from the 1900 to the 2020 Olympic games. The results of the 1956 Olympic Games hosted by Melbourne were added manually. At the time, Australia insisted on 6-month quarantine for horses. For that reason, equestrian events were held in Stockholm (Olympedia, 2023a). Results from the 1956 Stockholm events can't be found on the Olympic Games website. According to the results of the official website, Germany won medals in different periods under different official names: Federal Republic of Germany (1968 – 1988) and Germany (1900 – 1964 and 1992 – 2020). For the purposes of the analysis, it is counted as one country – Germany. There were no team medals awarded in the 1932 Los Angeles games, as no team had three riders to finish the course, and were therefore all disqualified (Olympedia, 2023b). When equestrianism returned to the Olympic setting in 1900, there was only individual and no team competition (Olympedia, 2023c). In 1916, 1940, and 1944 games were canceled due to world wars (Roos, 2023). In the years 1904 and 1908 showjumping wasn't a part of the Olympic program (International Olympic Committee, 2017).

For that reason, the equestrian market of those two countries is going to be explored deeper in the following section. The goal is to demonstrate the market of countries that have proven to master the art of horsemanship on the global stage on a longer time scale, as seen through their Olympic achievements. This dual approach seeks to offer a comprehensive understanding of the overall equestrian landscape.

3.3.1 Statistics According to FEI

The International Equestrian Federation annually publishes a comprehensive Facts & Figures report, offering valuable insights into the organization of equestrian events, the popularity of different disciplines, and the strength of nations in terms of both riders and horses. According to FEI's 2022 report (FEI, 2022b), there were 4.545 international competitions organized in that year. This is more than %70 increase compared to 2009. Out of those 4.545 events, the majority of them hosted showjumping discipline, followed by endurance, eventing, dressage, driving, and vaulting. There were the least shows in para-dressage. Figure 8 below is the number of FEI events per FEI discipline in 2022. The top three countries hosting FEI events in 2022 were France with 563 events, the USA with 453 events, and Italy with 295 events. Estonia was the country with the greatest increase in several events organized with 51 events, which is more than % 5.000 more than in 2009.

Figure 8: Number of FEI Events per FEI Discipline in 2022
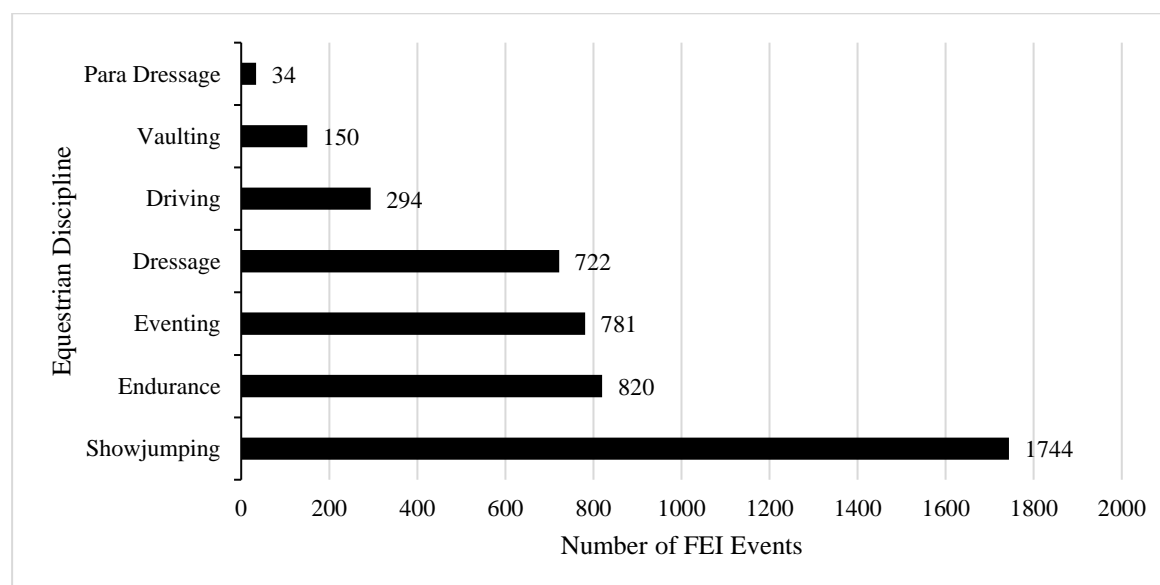
Source: FEI (2022b).

There were 42.352 athlete registrations and 76.803 horse registrations. The most registrations for both athletes and horses were made for showjumping discipline.

Figure 9 below is the distribution of registrations among disciplines. The most athlete registrations come from France with 5.895 registered athletes, followed by Germany with

30

3.711 athletes, and Italy with 3.529 athletes. France is also the origin of most horse registrations with 11.469 horses registered, followed by Germany with 8.921 horses and Belgium with 5.898 horses.

Figure 9: Number of FEI Athlete and Horse Registrations in 2022
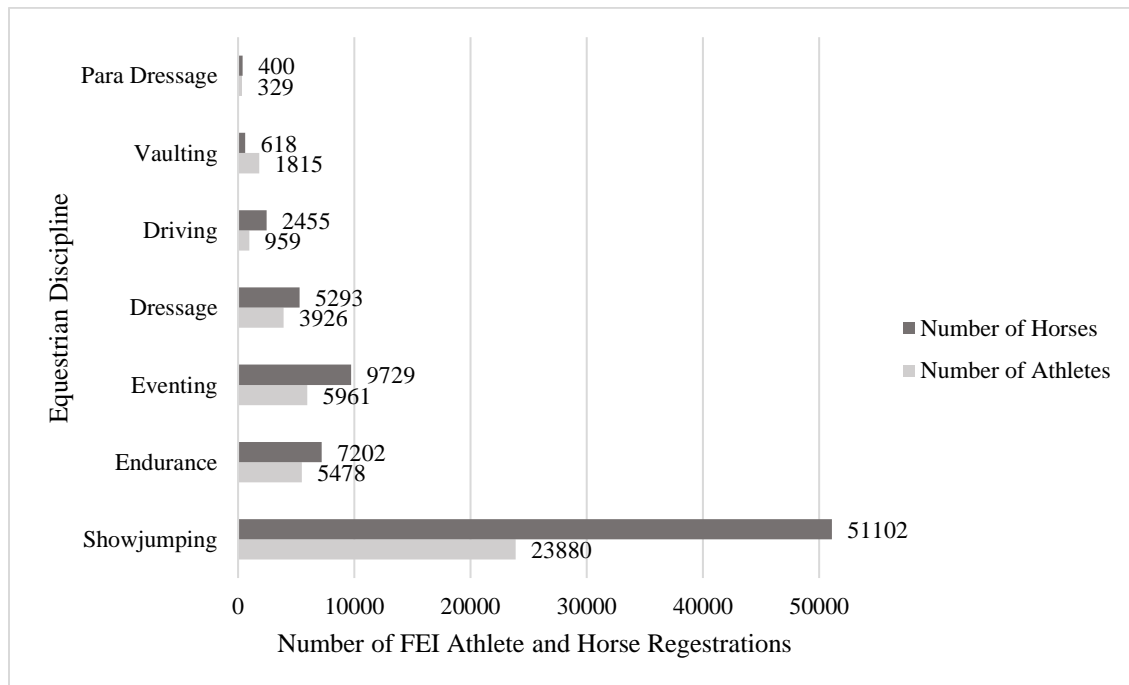
Source: FEI (2022).

3.3.2   German Equestrian Market

Germany is a horse-loving country. Their national equestrian federation, Deutsche Reiterliche Vereinigung, more known as Fédération Équestre Nationale (FN), stands as the world's largest equestrian national federation as well as largest equestrian sports association. It ranks 9th largest sports association within German borders. It has strived for success ever since its establishment, and the primary reason for its establishment was the poor performance of the German Equestrian team at the 1912 Olympics in Stockholm. In the year 2023, there were 3.645 German athletes and 8.958 German horses registered for international competitions. The county is a home to 7.278 riding clubs, 664.919 club members, and 80.000 breeders. According to a Market survey of IPSOS on behalf of FN, 11.2 million Germans showed interest in horses and equestrian sport. Projections indicate there are 2.32 million horse riders – 840.000 regular and active riders, and 1.48 million occasional riders. There are estimated to be 1.25 million horses in Germany. At least 600.000 households have at least one horse, while around 920.000 households have at least one person involved in riding. In 2022 Germany held 3.562 equestrian events with 1.111.842 starts. Accumulation of cash prizes reaches €29.928.312. Breeding also plays an important role, with 8.219 registered breeding stallions, 83.855 broodmares, and 42.320 foals in 2022. The strong influence of

economic factors is indicated in the turnover of the German horse industry, which is estimated to be €6.7 billion. More than 10,000 companies, craft businesses, and service companies in Germany directly or indirectly have horses as their main business object. Average price of auctioned horses under the German breeding association in 2022 was €28.735 (Helkenberg, 2020; FN, 2023a; FN, 2023b; FEI Database, 2023d).

3.3.3   American Equestrian Market

American Horse Council (2017) analyzed the economic impact of the United States horse industry in their 2017 EIS Facts report. Based on their study, the equestrian industry contributes roughly $50 billion in direct economic impact to the US economy. It supports a direct workforce of 988.384 jobs. The industry itself is providing $38 billion in direct wages, salaries, and benefits. Including other sectors of the economy the horse industry contributes to, the total indirect contribution to the US economy adds to $122 billion and an employment impact of 1.7 million jobs. They're estimating there are 1,6 million households in the US owning horses, which is about %1,3 of the US population. 38 million of them, %30,5, are horse enthusiasts and equestrian sports spectators. There are approximately 7,2 million horses across the whole country. About 3.141.449 horses are used for recreation. There is a close similarity of horses for showing, 1.227.986, and for racing, 1.224.482. Most of the horses can be found in Texas, approximately 767.100 of them. The annual cost of horse ownership was calculated to be $7.896. Half of US equestrians earn more than $100.000 yearly, while %60 of them have managerial positions. Results of the American Horse Publications survey (2021) revealed that the average horse owner in the US owns six horses. There were 2.551 American athletes and 4.036 American horses registered for international competitions in 2023 (FEI Database, 2023e).

4   ANALYSIS OF DIGITAL FAN ENGAGEMENT IN SHOWJUMPING

4.1   Methodology and Research Questions

The primary aim is to illustrate the current state of digital fan engagement in showjumping and understand the motivations, channels, and goals driving this phenomenon. My research questions encompass a broad spectrum of inquiries regarding the current landscape of digital fan engagement, predominant digital channels utilized, quantitative metrics indicating engagement levels, the influence of digitalization and emerging technologies, motivations for digital engagement, and underlying goals of digital fan engagement initiatives.

Addressing these questions comprehensively consisted of the employment of a multi-faceted methodology. Primary data was collected through interviews with industry professionals of fan engagement in the equine industry. Firstly, a set of questions regarding digital fan

engagement was sent to Mrs. Alicia McLaughlin, Director of Marketing at Wellington International. Wellington International is an organizer of the Winter Equestrian Festival that is held in Wellington, Florida, every year from the beginning of January till the end of March. This is a set of twelve back-to-back equestrian competitions on the highest level. It is considered one of the biggest equestrian events due to the number of athletes, horses, visitors, arenas, and competitions organized in one location at the same time. Questions were answered in written form and obtained on 20.3.2024 via e-mail (see Appendix 5). Secondly, an interview was conducted with Mrs. Helena Matjašec, representative of ClipMyHorse for the East Europe division (see Appendix 6). Mrs Matjašec also provided ClipMyHorse's internal data and annual reports from 2019 to 2024 (see Appendix 7). ClipMyHorse is a Germany-based streamer and broadcaster of equestrian sports and breeding events. Additionally, they maintain an online library of educational equestrian-themed videos. They cover over 1.000 events annually in Europe, the US, and Australia. The interview was conducted in the Slovene language on 12.3.2024 via a Facebook Messenger call and lasted for about 30 minutes. The questions were open-ended. Secondary data consists of relevant literature, scholarly articles, publicly available data from social media, and industry reports.

All collected data was summarized and analyzed to derive insights into key concepts and trends in digital fan engagement within equestrian sports. Personal expertise gained through bachelor and master studies at SEB LU, as well as seventeen years of involvement in equestrian sports, contribute to understanding the analysis, interpretation of findings, and formulation of conclusions.

4.2   Landscape of Digital Fan Engagement in Showjumping

McLaughlin (in an interview, 2024) finds adoption of digital fan engagement in showjumping is slow. Equestrianism, steeped in tradition, has historically been a late adopter of technology and digital solutions in comparison to other sports. The FEI, serving as the central governing body, is conscious about maintaining the integrity and essence of the sport amidst the digital age. Rather than seeking to revolutionize the sport, the FEI's approach to digital fan engagement emphasizes integration that enhances the equestrian experience while preserving the sport in its traditional form (Islam, 2023). Straus (2022), FEI's commercial director, is mindful of the inadequate alignment of decision-making mechanisms with the rapid technology revolution, by pointing out that many business decisions are driven by fear of being left behind, rather than truly understanding the benefits of technology adoption.

A very important player in the conduction of fan engagement within equestrianism is Germany's SAP – the country's largest company by market cap (Companies market capitalization, 2023), and one of the largest non-American tech giants. SAP is supporting equestrianism in the technological breakthrough. It is not only one of the biggest sponsors of equestrian events but also FEI's official analytics sponsor (SGI, 2017). Even though SAP and its subsidiary Black Horse One (a branch for equestrians) primarily focus on dressage

and eventing disciplines, they also offer other more general equestrian sports solutions for sportsmen, event organizers, and fans. In 2012 they even opened the SAP Equestrian Experience Center where they introduced Germany's first riding simulator (Klose, 2020). Collaborating with EquiRatings, an equestrian data analytics firm, SAP initiated the Fantasy Sports Fan League known as Event Rider Masters. This league enabled fans to assemble their dream team of riders for real or simulated events, with budgets determined by EquiRatings and SAP's predictive analysis tool. Unfortunately, the league was canceled due to the COVID-19 pandemic and was never reinstated (Roome, 2020; Event Rider Masters, n.d.), nevertheless, there are other equestrian fantasy leagues still running. Further enhancing spectator engagement in dressage discipline, SAP introduced the Spectator Judging app. It is a platform where fans can simultaneously score and evaluate competing pairs, and then compare their scores with those of official judges (Black Horse One, n.d.).

Understanding the differences between equestrian disciplines is key when it comes to engaging with equestrian fans. Even though they share an affection for horses, each discipline attracts its own audience. For example, live showjumping events draw mostly male audiences, while dressage events tend to attract family-focused audiences. To underly unique aspects of each discipline, FEI took a step in this direction in 2017 by creating separate Facebook pages for each discipline. This makes it easier for fans to find the content they're interested in. FEI's research shows that there are around 750 million equestrian fans worldwide. Up to %75 of them are women, depending on the discipline. These fans tend to be family-oriented, financially well-off, educated, and brand loyal (Friend, 2018; FEI, n.d.c). There is also a noticeable surge in fans passionately supporting their favorite athletes, akin to fandom in other popular sports (Aslam, 2019).

Unlike other sports facing declining TV viewership, showjumping doesn't traditionally rely heavily on television exposure. It doesn't attract large mainstream audiences beyond its core base, as showjumping's audience is primarily composed of dedicated equestrian enthusiasts (Griffin, 2020). Furthermore, the concern persists that reduced engagement in a sport, in general, may correlate with diminished viewership. Many sports are troubled by declining participation rates. But showjumping presents a different narrative. It has seen a consistent rise in athlete and horse registrations over the years, indicating a growing interest in the sport. To be exact, a %56 increase in athletes and a %60 increase in horses since 2009 (FEI, 2022b). However, they are, like other major sports, seeking ways to engage and connect with younger generations (Straus, 2022). Equestrian engagement campaigns are very clearly set up to target a certain demographic, a certain age group. eGame FEI Equestrian World Tour or My Horse World TikTok channel are targeting younger generations, in particular Gen Z and Generation Alpha. However, when it comes to geolocation targeting, experts like Matjašec (in an interview, 2024) and McLaughlin (in an interview, 2024), who are actively engaged in the conduction of fan engagement in showjumping, make no significant difference in their work or effort when it comes to this matter. They prioritize audience preferences.

Within the OTT and live streaming sector, two players stand out – GCTV and ClipMyHorse TV & FEI TV. GCTV covers live streaming and on-demand video content of Longines Global Champions Tour events – the largest showjumping league. Service includes commentary on live events in English, French, Spanish, and Chinese language (GCTV, n.d.).

Figure 10: ClipMyHorse and FEI TV as a Single Platform in the App Store
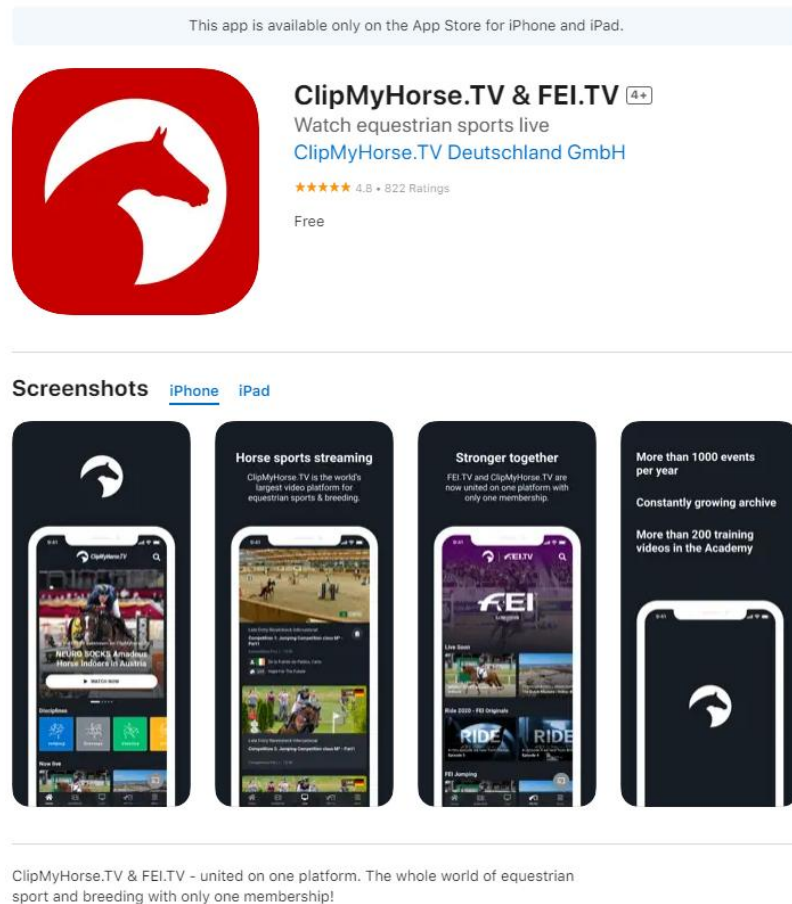
Source: Own work.

ClipMyHorse TV, launched in 2007, and FEI TV, launched in 2009, used to be separate entities. They joined forces in 2020 when FEI acquired an equity stake in CMH, and are today working unitedly, as seen in Figure 10. Together, they provide a wide selection of live streaming and on-demand coverage of historic events. They are also an exclusive partner of the US Equestrian Federation's Network. CMH TV & FEI TV portfolio includes both national and international equestrian events, as well as stallion licensing, horse and foal auctions, and other extensive collections of equestrian-related content, forming a database of information on athletes and horses. This commercially beneficial merger has led to the growth of online traffic and engagement. The rise of viewing is seen as an inclination towards technology and suggests a progressive direction for the sport's future. Another step in this direction is indicated with an exploration of the application of AI for automated screen

capture in their services (FEI, 2020; Islam, 2023; USEF, n.d.). An interview with Matjašec (2024) revealed a distinctive aspect of equestrian event broadcasting. Unlike other major sports, where event organizers sell their rights to broadcasters, in equestrianism, organizers pay broadcasters to cover their events. ClipMyHorse TV & FEI TV's revenue thus stems from both event organizers, who pay for coverage, and subscribers or fans, who pay to access the content.

On February 12th, 2024, FEI published its Non-Rights Holders' Guidelines for Publishing on Social Media at FEI Named Events. These guidelines elucidate that all video footage rights of FEI-named events like World Cups, Nations Cups, European Championships, World Championships, and League of Nations, belong to the FEI. Guidelines imply filming and recording restrictions to Non-Rights-Holders within designated areas, where the term Non-Rights-Holders refers to athletes, their support network, horse owners, officials, accredited media and broadcasters, and designated areas refer to the main arena, warm-up arena, kiss & cry, leaders, lounge, entrance and exit areas. Publishing of video content from those areas on social media, mobile apps, websites, or blogs without explicit permission from the FEI is prohibited. However, there are no restrictions on photographing and sharing images. Athletes and national federations can submit a formal request via the FEI Sociale Platform to publish video content from the events. This video content is to be provided exclusively by the FEI. Violations of these guidelines may entail consequences such as revocation of accreditation for current and possibly future events. Additionally, the FEI reserves the right to request the removal of copyrighted content from relevant platforms, potentially resulting in account suspension (FEI, 2024; FEI, n.d.d). In this context, Mrs. McLaughlin (in an interview, 2024) expressed concern, as she hopes they'll continue to be allowed to utilize digital platforms to reach an expanded audience and garner new supporters.

4.3 Characteristics of Digital Fan Engagement in Showjumping

4.3.1 Focus on the Youth

Engaging the younger demographic presents an ongoing challenge for international sports federations, as young people have a pivotal role in driving the continued growth and sustainability of any sport. FEI is no exception. The caption of the attention of the generation that has grown up with digital technologies as an integral part of their daily lives requires innovative strategies that might deviate from the organization's corporate strategy. Recognizing the importance of connecting with young audiences, FEI emphasizes creating dedicated equestrian campaigns tailored to their digital expectations. The expectations are believed to be personalized content and two-way communication. The efforts illustrate an aim to engage with young audiences and ensure the continued relevance and sustainability of the sport. In these campaigns, which are mostly executed over social media, the central two factors are celebrating a horse-human connection and creative freedom. Instagram and TikTok are seen as the most prominent platforms to engage with the youth. In the scope of

digital listening, they also encourage young participants to create content, calling it "from youth for youth" (SportBusiness, 2021; FEI, 2022c; McLaughlin in interview, 2024). Gaming was also recognized as a means to connect with younger generations, as shown in the Equestrian World Tour mobile app initiative by the FEI. Being entertaining and enriching, gaming offers enjoyment, and mental stimulation and serves as an educational tool. Leveraging gaming presents an opportunity to promote the sport and cover topics of horse care, training techniques, and equipment usage. Despite the gaming landscape being predominantly male, with nearly %60 male gamers, the equestrian community stands out for its larger female gamer demographic (Straus, 2022; Friend, 2018).

4.3.2   Out-of-the-Field Content

Both Straus (Friend, 2018) and Matjašec (in an interview, 2024) emphasize a crucial insight: a significant portion of equestrian enthusiasts show great interest in the horses themselves. This suggests that the allure of the animal sometimes surpasses the competitive events. Consequently, both FEI's and ClipMyHorse's content strategy integrate a variety of competitions and educational material centered around various facets of horsemanship. These include the behind-the-scenes of competitions, athlete interviews, and insights into their daily lives. The FEI appears to prioritize content offering practical advice on horse care, their health, their well-being, nutritional guidance, and travel tips. They also explore contemporary equestrian trends such as fashion. The revelation that %50 of the FEI's digital traffic is non-sports-related indicates the high demand for content about horse-centric lifestyles. Similarly, ClipMyHorse has identified a growing interest and following in breeding-related content, such as stallion licensing and foal auctions. In their efforts to please this diverse range of interests, both organizations aim to provide content accessible to individuals irrespective of their discipline or level of equestrian knowledge to cultivate a broader and more engaged fanbase within the equestrian community. When determining which content to prioritize, the FEI utilizes analytical tools to detect and define audience preferences. They tailor their content strategy accordingly. Conversely, ClipMyHorse adopted a decentralized approach, allowing regional representatives to independently select events for coverage without the need for higher-level approval. This decentralized decision-making process ensures agility and responsiveness to local audience preferences and market dynamics.

4.3.3   Reaching Global Fanbase

Showjumping is a global sport from many perspectives. On one hand, there is a worldwide fanbase. To reach and engage with this global audience, digital means, and different digital channels must be utilized (Kennedy, 2015). On the other hand, athletes, horses, and venues are spanning across different countries, leading to demanding traveling schedules (FEI Sports Forum, 2013). Horses, like humans, have to board the plane to go from one competition to another. Figure 11 Visually presents the phenomenon.

Figure 11: Horses on an Airplane

Source: VetSchoolDiary (2016).

Europe and the United States are the two traditional building blocks and major global markets of equestrianism. Recently, sports have been impressively growing in South America, China, and India. Those countries are witnessing economic prosperity and consequently growth of expenditure on leisure activities, including horseback riding (Fact.MR, 2023; Friends, 2018). What made sport global is the sport's biggest league – the Longines Global Champions Tour. Its overall prize money, surpassing €36 million in the 2024 season, attracts competitors as well as spectators from all around the globe. It consists of 16 competitions across Arab countries, the United States, Mexico, China, and Europe (LGCT, 2024). Building of global fan base was not a coincidence. It is due to a vision of a founder, Jan Tops, who himself was a Dutch showjumping rider, an Olympic medallist even. He wanted to open the sport to the world and share his passion. His goal was to present rides as serious athletes and to enable them to earn a living from the sport. Recognizing that rural venues might limit growth, the LGCT strategically hosts major cities like London, Paris, New York, and Doha. This urban setting draws large, enthusiastic crowds, including dedicated equestrian fans who even plan vacations around the events (Aslam, 2019). The equestrian audience truly is highly dedicated. They travel worldwide to watch their favorite athletes and horses compete. Even in times of warnings and actual natural disasters, as proved in 2018 for the World Equestrian Games that were held in Tryon, US, where one day

of the event was canceled due to Hurricane Florence. Regardless, more than 200.000 international fans traveled there and bought tickets for the eleven-day event (rEvolution, n.d.).

4.3.4 Horse Brand Building and Information Library

As discussed, digital fan engagement extends beyond entertainment. It encompasses both knowledge generation and knowledge sharing. While brand building is a crucial aspect in various sports, particularly for leagues, teams, and individual athletes, in showjumping, it extends to horse branding. Behind showjumping as a sports discipline, there is a significant secondary market where athletes often generate the majority of their income through horse and semen sales for breeding purposes. Showjumping sport horses are therefore more than just a team member or a sport partner, but an investment. In other sports, as previously mentioned, live game or match attendance holds a dominant importance. In equestrianism, the focus is shifting towards the storage and retrieval of historical horse performance data. The ability to review past performances of a horse, under different riders or on various grounds like sand or grass, holds immense significance for potential buyers and breeders. Factors such as the horse's results, its compatibility with different riders, and the characteristics of its offspring or its sire and dam line, significantly influence horse market value. Given the substantial financial investments involved, as top-level sport horses sell for millions, this information plays a pivotal role in the decision-making process (Marks, 2023a; Marks, 2023b).

4.3.5 Attracting Sponsors

The equestrian industry increasingly became an attractive channel for sponsorships and brand partnerships. It is attractive due to significant prize money, global reach, and specific audience demographics with high disposable income (Reid, 2021). Within the industry, traditional methods of sports sponsorship such as in-venue banners, branded jumps, and global marketing campaigns, have historically granted brands extensive international exposure. However, with the increasing prevalence of digital platform viewership, brands look for online engagement opportunities. Therefore, equestrian event organizers started offering brands direct advertising opportunities on their digital platforms. Some examples are social media posts that promote the sale of a product, product placement in equestrian lifestyle video series, or engagement activities like online surveys and quizzes, that can be reached through on-site QR codes (Friend, 2018). Similarly, McLaughlin (in an interview, 2024) pointed out digital advertisement opportunities to attract sponsors as one of the main reasons for Wellington International's efforts for digital fan engagement. Therefore, attracting sponsors is important for two main reasons. On one hand, they fill the budgets of hefty money prizes, and on the other hand, this increase drives up the horses' price (Swardson, 1986).

4.4   Engagement Numbers

Showjumping is the most popular equestrian discipline. According to ClipMyHorse's report spanning from January 2019 to April 2024, showjumping is a leader in watch time generation. As presented in Figure 12, it captures %56,7 of platform activity.

Figure 12: ClipMyHorse TV's Watch Time by Discipline, from January 2019 to April 2024
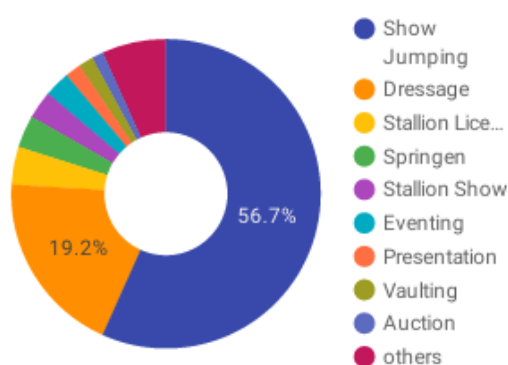
Source: ClipMyHorse TV (2024).

Analysis showed that Germany and the US are the most successful countries when it comes to showjumping and the Olympics (see Appendex 2 and Appendex 3). From 2019 to 2024, these two countries also present the highest number of ClipMyHorse's new trials. Figure 13 Reveals that the platform obtained 170.103 new trial registrations. 43.473 (%25,56) of them are German and 28.245 (%16,6) of them come from the US.

Figure 13: ClipMyHorse TV's New Trial Registrations by Country, from January 2019 to April 2024
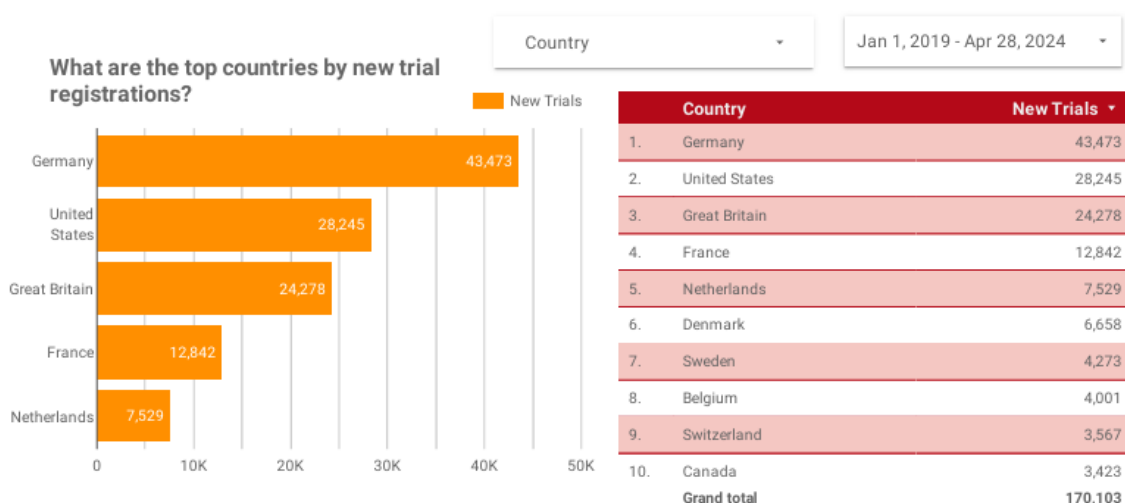
Source: ClipMyHorse TV (2024).

On the 28th of April 2024, the day that data was obtained, those two countries also presented the highest number of Premium Members, as presented in Figure 14. Out of 119.375 Premium Members, 37.858 (%31,7) of them are German, and 19.206 (%16,1) of them are American.

Figure 14: ClipMyHorse TV's Premium Members by Country on 28th April 2024

Country	Paused	Non Renewing	In Trial	Active	Grand total
				Type / Number	
DE	708	2,853	998	33,299	37,858
US	108	931	2,474	15,693	19,206
GB	86	528	920	8,928	10,462
NL	249	323	161	6,603	7,336
FR	363	339	408	5,848	6,958
BE	232	154	119	4,737	5,242
Grand total	2,277	7,280	6,761	103,057	119,375
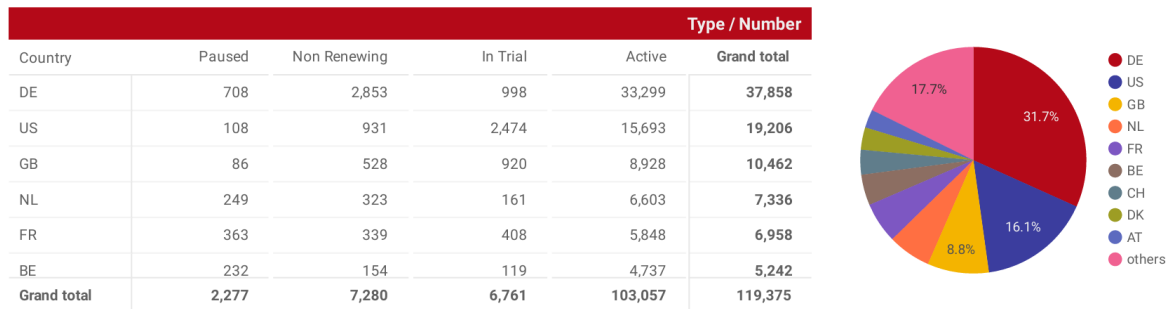
Source: ClipMyHorse TV (2024).

As Matjašec (in an interview, 2024) suggested, ClipMyHorse TV has seen a drastic increase in the number of users since the beginning of the COVID-19 pandemic. Presented in Figure 15, they have acquired 149.712 new registrations between 2019 and 2023 – 333 new registrations in 2019, 2.238 in 2020, 5.366 in 2021, 59.141 in 2022 and 82.634 in 2023.

Figure 15: ClipMyHorse TV's New Trial Registrations by Country, from January 2019 to December 2023
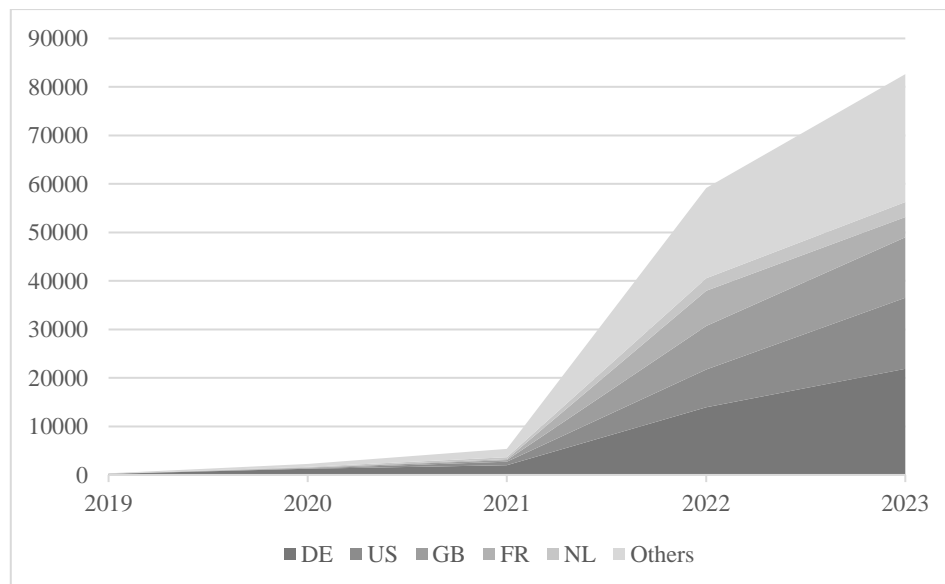
Source: ClipMyHorse TV (2024).

From January 1st to April 28th of 2024, the website platform attracted more users than the mobile app, while the mobile app generated more stream views. There is an obvious increased engagement on weekends, corresponding to show schedules. Refer to Figure 16.
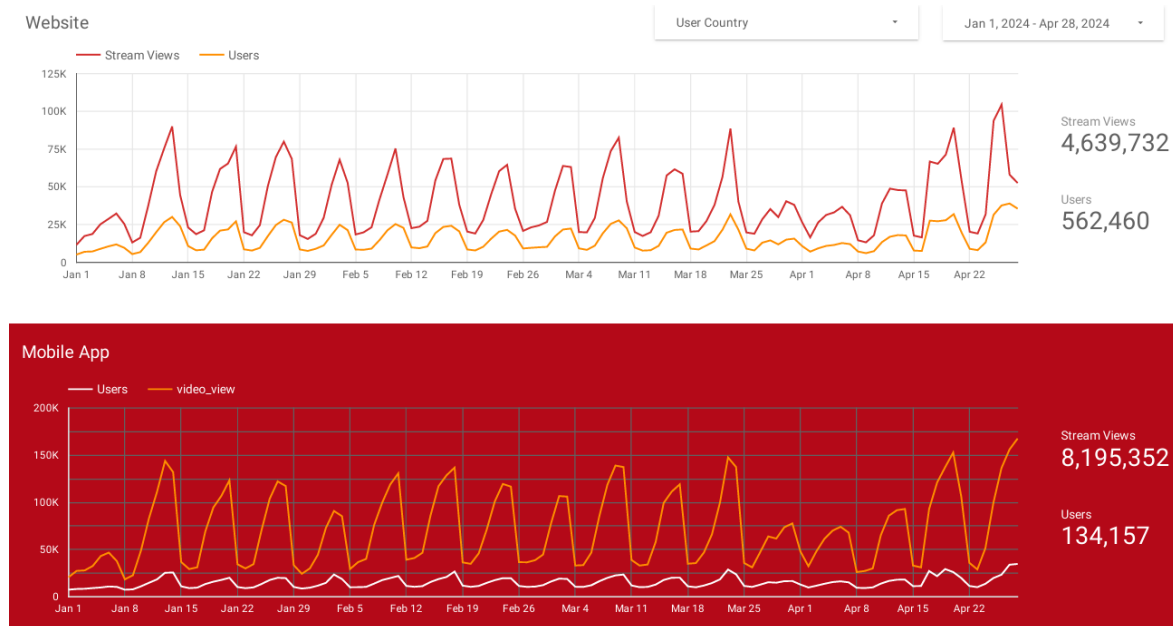
In its 2022 FEI Campaigns & Fan Engagement Report (2022c), FEI reports having 3.008.942 fans, 9.900.000 engagements, 18.360.000 video views, and a %31 increase in engagement in comparison to a year before. They have reached over 10 million views on their YouTube channel, where Americans generated most of the views, Germans ranked second and Indians ranked third. The most watched video of the year was a winning performance of Vaulting's 2022 FEI World Championships with 8 million views. In the same year, Major League Showjumping reported a total of 2.6 million impressions and 1.6 million video views across all of their social media platforms. Facebook presented 53.000 of those impressions and 110.000 minutes of Facebook Live views. Their league had 71.685 stream views in 66 countries on ClipMyHorse, with an average watch time of 42 minutes (Morrissey & White, 2022). FEI's eGame FEI Equestrian World Tour has reportedly more than one million downloads on Android's Play Store.

Table 3 Provides a comprehensive overview of the social media presence of various equestrian organizations and showjumping event organizers. Data was retrieved on the 6th of May 2024. For some organizations and platforms, data collection is not applicable (N/A). Notably, FEI separated its pages into distinct disciplines across certain social media pages. As a result, it commands a significant following across multiple platforms, with particularly strong engagement on showjumping and dressage platforms. Longines Global Champions Tour boasts impressive numbers across all platforms, indicating a broad and engaged audience. Interestingly, the Rolex Grand Slam of Showjumping garners substantial support on Facebook and YouTube, with comparatively fewer followers on TikTok and Instagram. Major League Showjumping and Wellington International also maintain respectable social

media followings, albeit on a smaller scale compared to some of the larger organizations and events. Overall, these figures reflect the diverse and active online communities within equestrian sports, with each entity leveraging social media platforms to varying degrees of success.

Table 3: Social Media Presence of Equestrian Organizations and Showjumping Event Organizers on 6th of May 2024

	Facebook [followers & likes]	YouTube [subscribers]	TikTok [followers & likes]	Instagram [followers]
FEI	1.500.000 1.200.000	308.000	213.600 5.400.000	512.000
FEI Jumping	288.000 233.000	N/A	N/A	135.000
FEI Dressage	321.000 253.000	N/A	N/A	131.000
FEI Eventing	164.000 147.00	N/A	N/A	44.200
FEI Endurance	12.000 10.000	N/A	N/A	N/A
FEI Vaulting	74.000 62.000	N/A	N/A	N/A
FEI Driving	70.000 58.000	N/A	N/A	N/A
Longines Global Champions Tour	431.000 355.000	81.800	296.000 12.100.000	697.000
Rolex Grand Slam of Showjumping	48.000 44.000	3.130	13.700 544.900	83.200
Major League Showjumping	7.000 6.000	1.910	1.679 18.000	22.200
Wellington International	65.000 54.000	2.290	10.500 156.700	100.000

Source: Own work.

5   DISCUSSION

The findings of this thesis suggest that fan engagement in showjumping shares both similarities and distinct differences with mainstream sports – the ones that the literature is referring to, such as soccer, basketball, and baseball, etc. Understanding these aspects is essential for developing strategies that can balance the preservation of the sport's heritage with the demands of an increasingly digital and global fan base. Common aspects include youth engagement, consolidation of streaming providers, mobile-first trend, aim of global reach, and increasing popularity of out-of-the-field content, while distinct aspects lie in the unique profile of the audience it attracts, low reliance on TV exposure, and limited number of engagement channels.

One notable commonality between showjumping and other popular sports is the emphasis on youth engagement. As indicated in the theoretical part of the thesis, younger audiences are increasingly difficult to reach through traditional channels like TV. In showjumping, TikTok and Instagram are seen as the most prominent platforms to engage with the youth, alongside initiatives of mobile app gaming. The consolidation of streaming providers is another parallel between showjumping and other sports. Just as major sports networks like ESPN, Fox, and Warner Bros have joined forces to tackle content fragmentation and cost optimization, equestrian sports have witnessed a similar trend with the merger of FEI TV and Clip My Horse TV. Linear TV is increasingly replaced by online and on-demand viewing. The mobile-first trend also holds for showjumping, aligning with broader trends in sports media consumption. As demonstrated by reports from Clip My Horse, mobile devices have become the preferred medium for fans to engage with content. Similar to traditional sports, conductors of showjumping have recognized the importance of global reach. The Longines Global Champions Tour's use of iconic international venues is an effective strategy to increase the sport's global visibility and connect with local audiences, much like how the NBA organizes the Global Games. The growing interest in behind-the-scenes content is prevalent across many sports. This is a type of content that is not always related to actual competitions. It plays a role in fan engagement by offering a deeper connection to the sport's ecosystem. Showjumping has adopted this trend through content that focuses on educational videos and horse welfare, as well as stallion licensing and auctions.

Despite these commonalities, showjumping retains unique characteristics that set it apart from other sports. One of the most prominent aspects is its niche nature and deep-rooted tradition. Showjumping is steeped in history. While many sports have become more commercialized and modernized, showjumping continues to maintain its traditional values. This shapes the type of audience it attracts, as well as the specific sponsors it partners with and its approach to fan engagement. As a result, the sport may be less inclined to rapidly adopt new digital strategies compared to other sports that have aggressively pursued digitalization. The sport's reputation of being niche and exclusive has led to a more cautious approach to expanding its digital footprint. Another unique feature is showjumping's relatively low reliance on TV exposure. While many other sports rely heavily on TV broadcasts, showjumping has not followed the same path. With the decline of TV consumption, mainstream sports are seeking new channels to engage with their fans. In contrast, showjumping didn't feel a pressing need to search for new channels to engage, resulting in a limited number and undiversified channels. Instead, the sport's digital presence is largely seen as a means to attract sponsors, rather than to build a large fanbase through direct fan engagement.

This can be seen as both an advantage and a limitation. On one hand, keeping the sport niche allows it to maintain its exclusive appeal, attracting sponsors who value the sport's particular lifestyle and demographic. On the other hand, this approach may limit the potential for broader fan engagement, particularly if the sport aims to increase its popularity in the future.

The practical contribution of this research lies in providing actionable advice for showjumping stakeholders to navigate the balance between maintaining a niche status and expanding the sport's reach. For showjumping to retain its sponsors and appeal to a larger audience, a strategic approach is required. The findings suggest that if the goal is to attract broader audiences, strategies such as incorporating betting initiatives, which have been successful in other sports, could prove beneficial. The gaming initiative already emerging within the sport seems to be a step in this direction. From a theoretical standpoint, this thesis contributes to the academic literature by synthesizing over 200 sources from diverse fields, offering a comprehensive understanding of fan engagement across sports and providing a foundation for further research. This research not only furthers knowledge within the context of showjumping but also provides insights into the broader field of sports fan engagement.

6   CONCLUSION

The research presents the dynamic between traditional values and modern technology, showing that while equestrian sports, including showjumping, are gradually adapting to digital engagement strategies, they remain slow adopters of new technologies. It is important to acknowledge the inherent limitations of this study, including potential biases associated with the selected methodologies and sources, as well as the ever-changing nature of digital technologies and fan engagement trends. The primary data sources included interviews with industry professionals and internal data from ClipMyHorse, which provided valuable insights but may not fully capture the diverse experiences of fans and stakeholders across different levels of engagement. Additionally, while the analysis covered major trends and strategies, the fragmented nature of the existing literature posed challenges in creating a unified framework for understanding the full picture. Despite these limitations, the thesis aims to provide valuable insights into the intersection of digital technologies, fans, and the showjumping equestrian discipline.

The two primary channels for digital fan engagement in the showjumping domain are broadcasting and social media, with social media experiencing the most challenges due to restrictive guidelines set by governing bodies like the FEI. This restriction limits the freedom of athletes and their fans to share experiences on social media, which is essential for building an active and engaged fan community online. Mrs. McLaughlin, Director of Marketing at Wellington International, expressed concerns during her interview, hoping that they will be able to continue to utilize digital platforms to reach a broader audience and attract sponsors.

Showjumping has seen significant growth in digital engagement, particularly through streaming services like ClipMyHorse. This platform, which merged with FEI TV, has become the central hub for equestrian content. According to ClipMyHorse's data, provided by Mrs. Matjašec, showjumping is the most popular equestrian discipline to follow, with Germany, the United States, and Great Britain leading in both current and new subscribers. A significant increase in viewership occurred in 2021 with the return of shows after COVID-

19 lockdowns. This growth trend has continued, indicating that digital platforms are essential for engaging fans, even as in-person events resume. Additionally, viewership peaks on weekends, correlating with the typical show schedules, further emphasizing the importance of accessible and flexible content delivery for fans who may not attend events in person. While equestrianism, like many sports, has faced challenges during the pandemic, it differs in one crucial aspect: rather than losing (younger) participants, it has seen an increase in registered athletes and horses every year, contrasting with the declining youth participation seen in many other sports. Growing interest from younger generations highlights the importance of engaging this demographic through channels that capture their attention.

Future research could focus on a more detailed examination of fan engagement across different equestrian disciplines, acknowledging that, while all share a common fan base of horse enthusiasts, there are notable differences in their audiences. These differences result in varying fan engagement strategies across disciplines, which merit further exploration. In conclusion, as digital continues to grow in importance, the future of fan engagement in showjumping will increasingly depend on balancing tradition with technological innovation, ensuring that both new and existing fans can connect with the sport in meaningful ways, with many possibilities opened to engage beyond the now utilized channels.

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APPENDICES

Appendix 1: Povzetek (Summary in Slovene language)

V hitro spreminjajočem se svetu športa je digitalno vključevanje oboževalcev postalo ključno področje za športne organizacije, ki želijo vzpostaviti s svojo publiko globljo in bolj interaktivno povezavo. To magistrsko delo raziskuje trenutno stanje digitalne vključenosti oboževalcev v kontekstu športne discipline preskakovanja ovir s konji, najbolj priljubljene konjeniške discipline z bogato zgodovino in svetovno prepoznavnstjo. Namen raziskave je pridobiti celostno razumevanje preseka med digitalnimi tehnologijami in športnimi oboževlaci, medtem ko je cilj podati celovit pregled digitalne vključenosti oboževalcev na splošno in ugotoviti, kako se to področje povezuje v preskakovanju ovir s konji. Motivacija za to nalogo izhaja iz prepričanja, da lahko uspešno implementiranje digitalnih tehnologij postane gonilo pozitivnih sprememb. Ker so raziskave o vključenosti navijačev, predvsem v digitalnem okolju, razmeroma nove, je to področje raziskovanja časovno relevantno. Kljub temu je obstoječa literatura razdrobljena, kar se kaže v več kot 200 virih, ki so prispevali k nastanku te naloge. Interpretacija teh virov skuša združiti spoznanja skozi strukturirano analizo.

Naloga je tematsko razdeljena na tri dele. Prvi del je teoretičen in vključuje definicijo športnega oboževalca, definicijo koncepta vključenosti oboževalcev, preučuje cilje in kanale vključenosti ter pregleduje možne prihajajoče izzive na tem področju. Drugi del sestavlja pregled preskakovanja ovir kot konjeniško disciplino in analizo tržnih razmer v dveh najuspešnejših državah v tej disciplini – Nemčiji in Združenih državah Aamerike. Ti dve poglavji postavljata temelje za empirično raziskavo, saj kontekstualizirata nadaljnjo analizo in postavljata preskakovanje ovir v širši kontekst globalnega športa. Zadnji del naloge je empiričen in se osredotoča na primarno raziskavo, s katero odgovarjam na ključna raziskovalna vprašanja. To je vključevalo pridobivanje podatkov skozi intervjuje s strokovnjaki, kot so Blaž Žitnik, podpredsednik oddelka Betting Entertainment Tools pri podjetju Sportradar, Alicia McLaughlin, direktorica marketinga za Wellington International, in Helena Matjašec, predstavnica podjetja ClipMyHorse za vzhodno Evropo. Gospa Matjašec je priskrbela tudi interne podatke in letna poročila podjetja za obdobje med letoma 2019 in 2024. Pridobljeni podatki so omogočili dragocen vpogled v področje digitalne vključenosti oboževalcev, s specifikami, vezanimi na preskakovanje ovir. Z opredelitvijo strategij in kanalov, ter analizo meritev vključenosti, raziskava ponuja vpogled v digitalno vključenost oboževalcev v tej nišni športni disciplini.

Zabeleženi so bili ključni splošni trendi na področju spremljanja športa. Tradicionalno je bila športna navijaška zvestoba globoko ukoreninjena v lokalnih skupnostih, pri čemer so navijači izkazovali pripadnost isti ekipi celo življenje, pogosto skozi več generacij. Vendar so digitalne tehnologije to dinamiko spremenile. Danes spremljanje športa ni več geografijsko pogojeno na lokacijo, kot le obisk stadiona, ali časovno, kot le dan dogodka. Športni oboževalci se lahko vključujejo in doživljajo šport onkraj tradicionalnih medijskih kanalov, kar navijačem omogoča, da se s svojimi najljubšimi športi ali športniki povezujejo kadarkoli in kjerkoli. Čeprav mlajše generacije raje spremljajo športne dogodke izven

prizorišča, gledanost linearne televizije upada. Ogled športnih tekem vse bolj postaja del širše družbene izkušnje. S porastom števila in priljubljenosti različnih kanalov, kot so video prenosi, družbena omrežja, navijaške aplikacije, e-športi, metaverzum in stave, se navijači s športom povezujejo neprekinjeno in globalno, kar ustvarja bolj povezano in poglobljeno izkušnjo.

Iskanje neposrednih vzporednic med tradicionalnimi športi in preskakovanjem ovir, še posebej v kontekstu vključevanja navijačev, je zahtevno. Konjeništvo nima klasične navijaške baze, saj konjeniški navdušenci večinoma delijo strast do živali in jih tekmovalni vidik športa manj zanima. Pravzaprav Mednarodna konjeniška zveza (FEI) navaja, da je kar %50 njihovega digitalnega prometa nepovezanega s športom. Poleg tega je konjeništvo zelo tradicionalna športna panoga, ki zgodovinsko gledano počasneje sprejema tehnologijo v primerjavi z drugimi športi. Velik napredek se je zgodil s pandemijo Covid-19, zlasti na področju video prenosa dogodkov. Kljub temu je vključevanje navijačev skoraj izključno omejeno na video prenos in družbena omrežja, saj ostali kanali vključevanja, kot so aplikacije za navijače, fantazijski športi ali stave, ostajajo večinoma neizkoriščeni. Poleg tega preskakovanje ovir tradicionalno ni močno odvisno od televizijske pokritosti. Kljub drugačnosti pa obstajajo določene podobnosti, zlasti pri konsolidaciji kanalov video prenosa, vključevanju mlajšega občinstva in gradnji globalne baze navijačev. Z nadaljnjo širitvijo digitalnih platform in s postopnim napredkom pri zbiranju podatkov se bo prihodnost vključevanja v šport, tako na splošno kot v preskakovanju ovir, vse bolj osredotočala na presečišče med tehnologijo, izkušnjo navijačev in globalno povezanostjo.

Appendix 2: Full List of Olympic Medals by Country

Table 4: Year, type and colour of Olympic medal in showjumping equestrian discipline earned by country from 1900 - 2020.

Row Lables	Count of Medal
Germany	**22**
1912	**2**
ind	1
Silver	1
team	1
Bronze	1
1936	**2**
ind	1
Gold	1
team	1
Gold	1
1952	**1**
ind	1
Bronze	1
1960	**1**
team	1
Gold	1
1964	**2**
ind	1
Silver	1
team	1
Gold	1
1968	**1**
team	1
Bronze	1
1972	**1**
team	1
Gold	1
1976	**2**
ind	1
Gold	1
team	1
Silver	1
1984	**1**
team	1
Bronze	1
1988	**2**
ind	1
Bronze	1
team	1

Gold	1
1992	**1**
ind	1
Gold	1
1996	**2**
ind	1
Gold	1
team	1
Gold	1
2000	**1**
team	1
Gold	1
2004	**2**
ind	1
Bronze	1
team	1
Bronze	1
2016	**1**
team	1
Bronze	1
United States of America	**19**
1932	**1**
ind	1
Silver	1
1952	**1**
team	1
Bronze	1
1960	**1**
team	1
Silver	1
1968	**1**
ind	1
Gold	1
1972	**2**
ind	1
Bronze	1
team	1
Silver	1
1984	**3**
ind	2
Gold	1
Silver	1
team	1
Gold	1
1988	**2**
ind	1

Silver	1
team	1
Silver	1
1992	**1**
ind	1
Bronze	1
1996	**1**
team	1
Silver	1
2004	**2**
ind	1
Silver	1
team	1
Gold	1
2008	**2**
ind	1
Bronze	1
team	1
Gold	1
2016	**1**
team	1
Silver	1
2020	**1**
team	1
Silver	1
France	**15**
1900	**1**
ind	1
Bronze	1
1912	**2**
ind	1
Gold	1
team	1
Silver	1
1928	**1**
ind	1
Silver	1
1948	**1**
ind	1
Bronze	1
1952	**1**
ind	1
Gold	1
1964	**2**
ind	1
Gold	1

team	1
Silver	1
1968	**1**
team	1
Silver	1
1976	**1**
team	1
Gold	1
1988	**2**
ind	1
Gold	1
team	1
Bronze	1
1992	**1**
team	1
Bronze	1
1996	**1**
ind	1
Bronze	1
2016	**1**
team	1
Gold	1
United Kingdom	**11**
1948	**1**
team	1
Bronze	1
1952	**1**
team	1
Gold	1
1960	**1**
ind	1
Bronze	1
1964	**1**
ind	1
Bronze	1
1968	**2**
ind	2
Bronze	1
Silver	1
1972	**1**
ind	1
Silver	1
1984	**1**
team	1
Silver	1
2012	**1**

team	1
Gold	1
2016	**1**
ind	1
Gold	1
2020	**1**
ind	1
Gold	1
Sweden	**11**
1912	**1**
team	1
Gold	1
1920	**2**
ind	1
Bronze	1
team	1
Gold	1
1924	**1**
team	1
Gold	1
1928	**1**
team	1
Bronze	1
1932	**1**
ind	1
Bronze	1
2004	**1**
team	1
Silver	1
2008	**1**
ind	1
Silver	1
2016	**1**
ind	1
Silver	1
2020	**2**
ind	1
Silver	1
team	1
Gold	1
Italy	**10**
1920	**3**
ind	2
Gold	1
Silver	1
team	1

Bronze	1
1924	**1**
ind	1
Silver	1
1960	**3**
ind	2
Gold	1
Silver	1
team	1
Bronze	1
1964	**1**
team	1
Bronze	1
1972	**2**
ind	1
Gold	1
team	1
Bronze	1
Switzerland	**8**
1924	**2**
ind	1
Gold	1
team	1
Silver	1
1928	**1**
ind	1
Bronze	1
1984	**1**
ind	1
Bronze	1
1996	**1**
ind	1
Silver	1
2000	**1**
team	1
Silver	1
2008	**1**
team	1
Bronze	1
2012	**1**
ind	1
Gold	1
Netherlands	**8**
1936	**1**
team	1
Silver	1

1992	**2**
ind	1
Silver	1
team	1
Gold	1
2000	**2**
ind	2
Gold	1
Silver	1
2012	**2**
ind	1
Silver	1
team	1
Silver	1
2020	**1**
ind	1
Bronze	1
Belgium	**7**
1900	**2**
ind	2
Gold	1
Silver	1
1912	**1**
ind	1
Bronze	1
1920	**1**
team	1
Silver	1
1976	**2**
ind	1
Bronze	1
team	1
Bronze	1
2020	**1**
team	1
Bronze	1
Mexico	**5**
1948	**3**
ind	2
Gold	1
Silver	1
team	1
Gold	1
1980	**2**
ind	1
Bronze	1

team	1
Bronze	1
Canada	**5**
1968	**1**
team	1
Gold	1
1976	**1**
ind	1
Silver	1
2008	**2**
ind	1
Gold	1
team	1
Silver	1
2016	**1**
ind	1
Bronze	1
Poland	**4**
1924	**1**
ind	1
Bronze	1
1928	**1**
team	1
Silver	1
1980	**2**
ind	1
Gold	1
team	1
Silver	1
Brazil	**3**
1996	**1**
team	1
Bronze	1
2000	**1**
team	1
Bronze	1
2004	**1**
ind	1
Gold	1
Soviet Union	**2**
1980	**2**
ind	1
Silver	1
team	1
Gold	1
Saudi Arabia	**2**

2000	**1**
ind	1
Bronze	1
2012	**1**
team	1
Bronze	1
Chile	**2**
1952	**2**
ind	1
Silver	1
team	1
Silver	1
Spain	**2**
1928	**1**
team	1
Gold	1
1948	**1**
team	1
Silver	1
Portugal	**2**
1924	**1**
team	1
Bronze	1
1936	**1**
team	1
Bronze	1
Czechoslovakia	**1**
1928	**1**
ind	1
Gold	1
Hungary	**1**
1936	**1**
ind	1
Bronze	1
Ireland	**1**
2012	**1**
ind	1
Bronze	1
Romania	**1**
1936	**1**
ind	1
Silver	1
Austria	**1**
1992	**1**
team	1
Silver	1

Japan	**1**
1932	**1**
ind	1
Gold	1
Grand Total	**144**

Source: Olymics.com (n.d.); Olympedia (n.d.), own work (2023).

Table 5: Year and type of gold Olympic medal in showjumping equestrian discipline earned by country from 1900 - 2020

Row Labels	Count of Gold Medal
Germany	**11**
ind	**4**
1936	1
1976	1
1992	1
1996	1
team	**7**
1936	1
1960	1
1964	1
1972	1
1988	1
1996	1
2000	1
France	**6**
ind	**4**
1912	1
1952	1
1964	1
1988	1
team	**2**
1976	1
2016	1
United States of America	**5**
ind	**2**
1968	1
1984	1
team	**3**
1984	1
2004	1
2008	1
Sweden	**4**
team	**4**
1912	1
1920	1
1924	1
2020	1
United Kingdom	**4**
ind	**2**
2016	1

2020	1
team	**2**
1952	1
2012	1
Italy	**3**
ind	**3**
1920	1
1960	1
1972	1
Canada	**2**
ind	**1**
2008	1
team	**1**
1968	1
Netherlands	**2**
ind	**1**
2000	1
team	**1**
1992	1
Switzerland	**2**
ind	**2**
1924	1
2012	1
Mexico	**2**
ind	**1**
1948	1
team	**1**
1948	1
Poland	**1**
ind	**1**
1980	1
Belgium	**1**
ind	**1**
1900	1
Japan	**1**
ind	**1**
1932	1
Soviet Union	**1**
team	**1**
1980	1
Czechoslovakia	**1**
ind	**1**
1928	1
Spain	**1**
team	**1**
1928	1

Brazil	**1**
ind	**1**
2004	1
Grand Total	**48**

Source: Olymics.com (n.d.); Olympedia (n.d.), own work (2023).

For the purposes of the thesis an expert interview was conducted with Mr. Blaž Žitnik, Sportradar's Vice President of Betting Entertainment Tools department under which falls digital fan engagement. Sportradar is an industry leading company that collects and analyses sports data. Their range of services and sport technology products covers all major sports globally, encompassing almost one million sport events per year. Interview was conducted in Slovene language on 1.2.2024 on online platform Zoom and lasted for about 45 minutes. The questions were open ended and prepared in advance.

Mr. Žitnik:

"Včasih je bil fan engagement bolj skoncentriran na lokalno okolje. Stadion je bil osrednji faktor. Izraz se je začel uporabljati med korono. Govorimo torej o neki socializaciji, ki lahko poteka online ali offline. Zanimiv je primer nogometnega kluba Real Madrid izpred približno 15 let. Sploh v tistem času je bil to eden večjih športnih klubov izven Amerike, ki ni imel nobene tendence po tem, da gre na digital. Vrjeli so, da je njihov fan base dovolj velik in dovolj močan. V Madridu so jih vsi poznali in to je bilo vse, kar so želeli. Komukikacija je potekala skozi klasične medije kot so časopisi. Potem pa se v nekem trenutku odločijo za uporabo digitalnih medijev, kot sta Facebook in takrat še Twitter. Šele takrat so ugotovili, da %90 njihovih oboževalcev ni Špancev. Mislili so, da je Španija njihov svet, medtem ko je bil njihov svet veliko večji. Podobno se zdaj že kar nekaj časa dogaja z vsemi ameriškimi klubi. Če bi bil Dončić Kitajec, bi to bila zmaga za NBA, ker bi tako naenkrat milijarda in pol ljudi spremljala tekme. Zato namerno poizkušajo odpirati **v**rata v druge države izven Amerike; v Ameriki so dosegli plafone. Če se naveževa nazaj na stadion - večina fanov NBA v življenju ne bo bila na stadionu oziroma se udeležila tekme. Se pravi, to je možno edino preko digitalnih medijev. Tako se je razvijal fan engagement, skozi gen Z in sedaj sledečo generacijo α. In pa fokus iz športa na ostale stvari. Danes šport tekmuje z gamingom. Ogromno mladih se v resnici mogoče nikoli ne bo ukvarjajo s športom, kar je bilo 30 let nazaj precej nemogoče. Zato bo težko imeti fane, ker sami niso nikoli šli čez to. Zanj je to kot gledanje serije. Ni več tako močne čustvene komponente. Na drugi strani pa imamo na primer MLB. Imajo najdaljšo tradicijo, nekaj čez 120 let. Oni, recimo, so se kar odrekli generaciji. To se jim ni zgodilo prvič. Že vmes, nekje v 60ih, so eno generacijo malo izgubili. Pravijo, da so to zdaj tudi, in da se fokusirajo na naslednjo. Medtem ko je NBA na tem področju zelo agresiven. Dolgoročno jih skrbi to, kar sva že prej izpostavila, torej gaming, in ne ukvarjanje s športom. Kratkoročno pa, da se večino dogajanja ne dogaja pod njimi oz. pod njihovim nadzorom. Torej, na platformah, kot so X, Facebook, TikTok. Skratka, ne na njihovih platformah. Nad tem nimajo ne kontrole, niti neposrednega prihodka. Njih torej zanima, kako bi lahko čim več traffica, ki se dogaja po drugih platformah, spravili k sebi. Temu oni rečejo fan engagement. NBA fani so na X-u, in se pogovarjajo enkrat o vremenu, drugič pa komentirajo lokalno politiko. NBA pa bi rad, da takrat, ko govorijo o košarki, za to uporabljajo njihove platforme, kjer se o tem lahko pogovarjajo z ostalimi fani. Torej, zakaj je fan engagement zadnje čase tako popularen, sta po mojem mnenju ključni dve

komponenti. Prva, da digitalni traffic ne poteka po "domačih" platformah. In druga, da ima šport zaradi upada fizičnih aktivnosti prihajaočih generacij problem v daljši prihodnosti."

Eng: "Fan engagement used to be more concentrated on the local environment. The stadium was a central factor. The term began to be used during the coronavirus pandemic. We are talking about a form of socialization that can take place online or offline. An interesting example is the Real Madrid football club from about 15 years ago. Especially at that time, it was one of the biggest sports clubs outside of America that had no tendency to go digital. They believed that their fan base was large and strong enough. Everyone knew them in Madrid, and that's all they wanted. Communication was done through traditional media such as newspapers. At some point, they decided to use digital media, like Facebook and Twitter. Only then they found out that %90 of their fans were not Spaniards. They thought Spain was their world, while their world was much larger. Similarly, this has been happening for quite some time now with all American clubs. If Dončić was Chinese, it would be a win for the NBA because suddenly one and a half billion people would be following their games. That's why they deliberately try to open doors to other countries outside of America; in America they have reached ceilings. If we go back to the stadium - most NBA fans will never be at the stadium or attend a game in their lifetime. Therefore, interaction is only possible through digital media. This is how fan engagement has evolved, through Gen Z and now the following generation α. And the focus is shifting from sports to other things. Today, sport competes with gaming. A huge number of young people may never actually engage in sports, which was quite impossible 30 years ago. It will be difficult to have fans because they themselves have never gone through it. For them, watching sports it's like watching a TV series. There's lack of strong emotional component. On one hand, we have a different example - the MLB league, one with the longest tradition, over 120 years. They have completely given up on a generation. This is not the first time it's happened to them. They've also lost a generation somewhere in the 60s. They say they're skipping one now too, focusing on the next one. On the other hand, NBA is very aggressive in this area. In long-term, they are concerned about what we've already highlighted, namely gaming and the lack of participation in sports. But in short-term, that most of the action doesn't happen under them or under their control, on platforms like X, Facebook, TikTok. In short, not on their platforms. They have neither control over it, nor direct revenues. They are interested in how they can bring the traffic which happens on other platforms to their own platforms. They call this fan engagement. NBA fans are on X, discussing the weather one moment and commenting on local politics in the next. What NBA would like is they use their platforms when discussing basketball, where they can talk about it with other fans. So, in my opinion, the two key components that have made fan engagement so popular lately are: first, that digital traffic does not flow through 'home' platforms; And second, that due to the decline in physical activity among upcoming generations, sports may face a problem in the long-term future."

Interviewer:

"O tem sem tudi jaz brala, da šport danes na digitalnih platformah tekmuje tudi z Netflixom in s Spotifyjem. Torej tekma za pozornost ni samo ena športna disciplina proti drugi, ampak v bistvu proti celem entertainment sektorju."

Eng: "I have also read about this. Sports today, on digital platforms, competes with platforms like Netflix and Spotify. The competition for attention is therefore not just one sports discipline against another, but essentially against the entire entertainment sector."

Mr. Žitnik:

"Točno to. Mi, sploh v bettingu, sodelujemo s federacijami in klubi. S federacijami, da dobimo podatke, ki se potem uporabljajo na medijskem delu in pa v betting svetu. In pri tem je entertainment ena večjih prihajajočih zadev. Fun-time se veča in daljša. Jaz mislim predvsem, da se bo združeval. Različne industrije se bodo začele prepletati in združevati v en velik entertainment, in šport bo sigurno en del tega. Kar je posebnost športa je predvsem ta, da je v bistvu skoraj še edina stvar, ki je res pomembna takrat, ko je v živo. Nič več ni tako nujno v živo. Ne poročila, ne filmi, ne serije. Šport pa še drži to komponento. Zato vsi kupujejo pravice za prenos športa – Amazon, Apple, YouTube…, ker v resnici s športom dobiš določene ljudi, ki jih ne boš mogel nikoli dobiti s serijami in filmi. Ko uporabnik kupi subscription, potrebuješ načeloma 1 do 2 dogodka na mesec, da ga držiš oz. da vrjame, da se mu splača plačevati. Če se vrneva nazaj na fan engagement. Pri vsaki stvari imaš acquisition in retention. Pri tem je acqustion čisto drug od retentiona. Vzamiva za primer neko storitev, recimo za otroke. Če hočemo, da bodo starši kupili subscription za otroke, moramo gor dari smrkce. Skratka risanke, ki so jih gledali oni, čeprav bo potem otrok gledal čisto druge stvari. Ali pa če greva na userja. User bo subscription vzel zaradi dokumentarcev, čeprav jih na koncu ne bo gledal. Gledal bo romantično komedijo, ali pa turško serijo. Se pravi, kupiš zaradi ene stvari, ostaneš pa zaradi tretje. Torej na eni strani kako dobiti ljudi, in pa na drugi, kako jih držati. Fan engagement gre bolj v smeri zadrževanja. To je lahko chat, lahko so igrice, najboljše pa da je kar vse skupaj. Vse stvari gredo vedno v valovih. Pridejo pametni telefoni, naenkrat imamo vse funkcije v enem. In tega naenkrat rata preveč, dobimo poplavo appov. Zato v tem trenutku noben več ne nalaga novih. Danes težko dobimo uporabnika, da sploh potegne aplikacijo. Da pride tvoje aplikacija na home screen, sploh pa na prvega, je zelo težko doseči. Tam so samo aplikacije, ki jih imajo že vsaj 2 leti. Se pravi, ker je prevelika poplava vsega, se že spet nazaj dogaja konsolidacija. Imeti znotraj enega appa 5, 10, 50, 100 stvari. Potem pa se bo spet razbilo, ampak definitivno smo trenutno v fazi konsolidacije. Enako velja za entertainment. Trenutno se združujeta gaming in betting. Zdaj so že patentirali, da ko igraš Fifo prek Playstationa, lahko med sabo bettaš. Primer te konsolidacije je tudi aplikacija WeChat na Kitajskem, kjer gre popolnoma vse čez njega. Naročiš frizerja, pokličeš taksi, plačaš pico. Muskov X gre v isto smer. Cilj je torej biti tako velik, toliko močen, in imeti toliko traffica, da vsi hočejo biti del tebe, ker vedo, da bodo imeli od tega plus. Enako kot Amazon store; se splača sam narediti svojo trgovino in se sam dati na net?"

Eng: "Exactly. Especially in betting, we collaborate with federations and clubs. With federations, to obtain data that is then used in the media and in the betting world. And entertainment is one of the biggest upcoming things in this area. Fun-time is increasing and lasting longer. I mainly think it will merge. Different industries will start to intermix and merge into one big entertainment. Sports will surely be a part of it. What's makes sports unique is that it's almost the only thing that really still matters when it's live. Nothing else is so essential to watch live anymore. Not news, not movies, not TV series. But sports still hold that component. That's the reason everyone is buying rights for streaming sports – Amazon, Apple, YouTube... With sports, you get certain people that you will never get with series and movies. When a user buys a subscription, you generally need 1 to 2 events per month to keep them interested or to make them believe it's worth paying. If we go back to fan engagement. We have acquisition and retention, where acquisition is completely different from retention in this regard. Let's take a service, for example, for children. If we want parents to buy a subscription for their children, we have to put Smurfs on it. Basically, cartoons that they watched. Even though the child will end up watching completely different things. Or if we talk about the user. The user will take a subscription because of documentary movies, even though they won't end up watching them. They will watch romantic comedies or Turkish TV series instead. Therefore, you buy because of one thing, but you stay because of another. On one side, how to acquire people, and on the other, how to retain them. Fan engagement leans more towards retention. This can happen in a form of chat, games, or preferably all together. Everything always goes in waves. Smartphones come and suddenly we have everything in one device. Through time it becomes too much, we get a flood of apps. That's why no one is downloading new ones. Today it's hard to get a user to even download an app. Getting your app onto user's home screen, let alone the first screen, is very difficult to achieve. Its reserved for apps that have been there for at least 2 years. So, because there is an overflow of everything, consolidation is happening again. Having 5, 10, 50, 100 things within one app. Then it will break again, but at the moment, we are definitely in a consolidation phase. The same applies for entertainment. Currently, gaming and betting are merging. They have already patented that when you play FIFA through PlayStation, you can bet against another player. An example of this consolidation is the WeChat app in China, everything goes through it – ordering a hairdresser, calling a taxi, paying for pizza. Musk's X is going in the same direction. The goal is to be so big, so powerful, and have so much traffic that everyone wants to be a part of you. They know they'll benefit from it. Just like the Amazon store; is it worth it to make your own store and go online yourself?"

Interviewer:

"Se pravi bi rekli, da sta acqusition in retention glavna cilja fan engagementa?"

Eng: "Would you therefore say that acquisition and retention are the main goals of fan engagement?"

Mr. Žitnik:

"Tudi acquisition, ampak predvsem retention. Če posplošim. Imaš ljudi, ki so novi uporabniki, imaš ljudi, ki so neodločeni, in imaš ljudi, ki so stari uporabniki. Se pravi, prvim moraš razložiti, kaj sploh je ta storitev. Moraš jih privlačiti in tako pridobiti. Fan engagement je sigurno en super del tega. Recimo preko influencerjev. Ali pa recimo za neodločene. To so tisti, ki so že prišli, pa ne vedo čisto točno kaj bi. Tudi to se lahko zapelje skozi fan engagement. Potem pa imamo še tretjo skupino – tiste, ki so že dalj časa uporabniki. Ti se delijo na dva pola. Prvi, ki so zadovoljni, in jim gre potem vsaka novost na živce. In pa drugi, ki imajo novosti radi. Ne glede na vse pa bi rekel, da je pri vsaki stvari potreben nek del socializacije. Vsak rad deli svoje mnenje. Pozitiven občutek je, da si tudi ti del neke široke zgodbe. Tega recimo Netflix nima. Zato mlajše generacije preko različnih kanalov streamajo taisti continent, samo zato, da se lahko vmes pogovarjajo. Če pustimo torej to, kako uporabnike zapeljati. Platforma, kot je Netflix, bi morala biti ta, ki driva engagement. Film je ponavadi lepše gledat v 2, 3, 5. Seveda tudi sam, odvisno od filma. Ampak tukaj sem obsojen, da ga gledam sam, če nimam nobenega poleg na kavču. Zato jaz definitivno pogrešam fan engagement na marsikateri platformi izven športa. Pa še ena stvar. Pravijo, da TV izginja. Sam bi rekel, da se bo nadomestil. Dejstvo je, da imamo vsi radi velike ekrane. Nek velik screen je nujno potreben. Ampak doma ga imajo ta stari čez. Mladi ne pridejo do njega in potem gledjo na telefonu. Načeloma pa vsi raje gledamo na večjem ekranu. Zato mislim, da se bo dinamika močno začela spreminjati z razširitvijo headsetov, kjer bo funkcija fan engagementa samo še rasla. Čeprav smo še v začetni fazi, se pričakuje, da bo to postajalo bolj dostopno, lažje in manjše. Na primer v obliki očal, leč. Prvič, TVja ne bomo več potrebovali, ker si bomo lahko naredili poljubno velik ekran v virtuali. In drugič, midva lahko sediva skupaj na kavču, pa gledava vsak svoj content. Tako da bo ta del socializacije v bistvu postal zelo seamless med digitalnim in nedigitalnim okoljem. Prehajal boš lahko kamorkoli boš hotel s katerokoli osebo."

Eng: "Acquisition as well, but primarily retention. If I generalize - we have people who are new users, we have undecided people, and we have long-time users. To the first group, you have to explain what the service is. You have to be attractive to get them. Engagement is definitely a great part of that. Say through influencers. Or for instance, for the undecided. Those are the ones who have already come, but don't know exactly what they want. This can also be done through engagement. Then we have the third group, those who have been users for a long time. They can be divided into two groups. First, those who are satisfied as is, and every novelty annoys them. And second, those who like novelties. Regardless, I would say that some degree of socialization is necessary for every aspect. Everyone likes to share their opinion. Being a part of a broader story evokes positive feelings. Netflix, for example, doesn't have that. That's why younger generations stream the same content through various channels, just so they can talk in between. Leaving aside how to attract users. A platform like Netflix should be the one that drives engagement. It's usually nicer to watch a movie with 2, 3, 5 people. Or alone, depending on the movie. But now I am doomed to watch it alone if I have no one next to me on the couch. So, I definitely miss fan engagement on platforms outside of sports. And one more thing. They say that TV is disappearing. I would

say it will be replaced. The fact is that we all love big screens. A big screen is a necessity. But at home, the older ones have control over it. The young ones don't get access to it, so they watch on their phones. In principle, we all prefer watching on a larger screen. Therefore, I think the dynamics will start to change significantly with the expansion of headsets, where the function of fan engagement will only grow. Although we are still in the early stages, it is expected to become more accessible, easier, and smaller. For example, in the form of glasses, lenses. Firstly, we won't need a TV anymore because we can create screen of any size in virtual reality. And secondly, we can sit together on the couch and watch our own content. This aspect of socialization will essentially become very seamless between the digital and non-digital environments. You'll be able to transition wherever you want with anyone you want."

Interviewer:

"Koliko pa mislite da smo daleč od tega?"

Eng: "How far do you think we are from that?"

Mr. Žitnik:

"Smo. Trenutno bi rekel, da smo na nivoju prvih Nokij. Z njimi probamo brati maile in iti na web. Če ni bilo nujno nujno nujno potrebno nisi šel. Prvi telefoni za mail so bili Blackberryji, za web pa v resnici iPhone. Želim povedati, da smo še par generacij stran. Potreben je še tehnološki napredek. Nismo še čisto za vogalom."

Eng: "We are. Currently, I would say we are at the level of the first Nokias, trying to read emails and go on the web with them. If it wasn't absolutely necessary, you didn't do it. The first phones for emails were Blackberrys, and for the web, it was actually the iPhone. I mean to say that we are still a few generations away. Technological progress is still needed. We're not quite around the corner yet."

Interviewer:

"Obstaja kakšna povezava med naravo športa in oblikovanjem vaše rešitve? Ima narava športa sploh kaj veze, ali imate nek model po katerem delate in ga potem aplicirate na vse športe?"

Eng: "Is there any connection between the nature of the sport and the design of your solution? Does the nature of the sport even matter, or do you have a model that you then apply to all sports?"

Mr. Žitnik:

"Tukaj bi rekel, da je predvsem odvisno koliko si velik. Mi vedno probamo narediti stvari scalable, tako da se zelo redko fokusiramo na šport. V betting svetu sta največja športa

nogomet in tenis. Med seboj sta zelo različna – en individualen, drug moštven. Vse ostale potem vržemo v koš 'kot tenis' ali 'kot nogomet'. Seveda se malo prilagodiš, ampak večjih sprememb na nivoju športa ni. Ni pa nujno, da je to čisto pravi princip. Vsak, ki je nov na marketu, bo vedno šel bottom-up. Vsak šport ima svoje specifike in svoje občinstvo. Fani so drugačni pri izražanju, karakterno, po prevladujočem spolu… Hočem reči, ne velja one size fits all, vedno iščemo balans. Je pa vedno odvisno koliko si velik. Se fokusiraš na 1000 ali se na milijon?"

Eng: "Here I would say it mainly depends on how big you are. We always try to make things scalable, so we very rarely focus on the sport itself. In the betting world, the biggest sports are football and tennis. They are very different from each other – one is individual, the other team-based. All the others are then categorized as 'like tennis' or 'like football.' Of course you adjust a bit, but there are no major changes at the sport level. However, it's not necessarily the right approach. Anyone who is new to the market will always go bottom-up. Every sport has its own specificities and its own audience. Fans differ in expression, character, predominant gender… There's no one-size-fits-all, we always seek balance. But it always depends on how big you are. Are you focusing on a thousand or a million?"

Interviewer:

"Torej lahko rečeva, da vam je profil fana pri tem bolj pomemben? Bolj, kot narava športa?"

Eng: "So, can we say that the fan profile is more important to you in this regard? More so than the nature of the sport?"

Mr. Žitnik:

"Definitivno gredo stvari precej širše, kot sam šport. Tako da je profil fana bolj zanimiva zadeva. Če se le da celo, da ga sledimo dlje časa. Zelo se tudi trudimo izogibati klasičnem segmentiranju, ampak profil ustvariti za vsakega posebej. Pri tem veliko vrat odpirata AI in machine learning, ker človek sam ni zmožen spremljanja toliko segmentov. Če gledaš pri sebi, imaš sigurno neke dneve, ko si čisto druga. Si slabe volje, in ti pašejo druge stvari. Ali pa zjutraj in zvečer. Nismo enoplastni. Ne moreš reči "jaz sem fan tenisa in to je to, zdaj pa samo to hočem". To je klasičen model od prej. Recimo Netflix. Imamo uporabnika, ki ima rad romantične komedije. Recommendation model mu zato ponuja samo romatične komedije. In on jih gleda. In potem rečejo evo, model dela. Ampak seveda gleda samo romantične komedije, če mu je samo to ponujeno. Gleda kar dobiva. In tukaj se dogaja en velik korak naprej. TikTok na tem področju dejansko orje ledino, kar se tiče recommendationov na splošno. Hitro dobro zadanejo in so zelo lepo personalizirani. Zadaj imajo ta nek %10 moment, ki testira content, ki ga uporabnik nikoli nebi videl sam, in pogleda, če mu je mogoče všeč. Če povzamem, profil uporabnika je zelo pomembna zadeva. Dosti bolj kakor šport sam. Tudi zelo redko pride do tega, da je nekdo zelo ozek v smislu, zanima ga samo eno, drugo zanj ne obstaja. Če vzamemo športe, kjer imaš milijarde fanov,

naprimer nogomet, tenis, hokej, košarko, … spremljajo več stvari naenkrat. Tvoj favorit zamenja ekipo, in naenkrat spremljaš drugo ekipo."

Eng: "Things definitely go much broader than just the sport itself. The fan profile is a more intriguing matter. If possible, we even try to follow it over a longer period. We also make a great effort to avoid classic segmentation and instead create a profile for each individual fan. AI and machine learning play a significant role in this regard, as a human alone cannot track so many segments. If you look at yourself, you definitely have some days when you're completely different. You're in a bad mood and you're into different things. Or in the morning and in the evening. We're not one-dimensional. You can't say, "I'm a tennis fan, and that's it, now I only want that". That's the classic model from before. Take Netflix, for example. We have a user who likes romantic comedies. The recommendation model therefore only offers them romantic comedies. And they watch them. And then they say, look, the model works. But of course they only watch romantic comedies - that's all that's offered to them. They watch what's shown. And here is where a big step forward is happening. TikTok is actually pioneering in this area when it comes to recommendations in general. They are quick at recognizing and are very nicely personalized. They have this 10% moment in the background that tests content the user would never have seen on their own, and sees if they might like it. In summary, the user profile is a very important matter. Much more than the sport itself. It's also very rare for someone to be very narrow in the sense that they're interested in only one thing, and nothing else matters to them. If we take sports where you have billions of fans, such as football, tennis, hockey, basketball, ... they follow multiple things at once. Your favourite player changes teams, and suddenly you're following another team."

Interviewer:

"Pa to počnete sami ali kupujete?"

Eng: "Do you do this yourselves or do you buy it?"

Mr. Žitnik:

"Na koncu je miks vsega. Kjer lahko, delamo sami. Sploh če je to core del. Nekje je treba kupiti, nekje sodelujemo s federacijami. Probleme imamo tudi zaradi cookijev, third party data in GDPRja. Zato imamo trenutno en čisto nov produkt, kjer smo v vlogi shranjevalca informacij, anonimiziranih, ampak first party. Se pravi vse moramo dobiti sami od njih. Mi pa jim poiskušamo vrniti value skozi advertizing. Sami pa lahko naprej uporabljamo podatke za targetiranje in tako naprej. Ampak je zelo odvisno od individualnega dogovora z federacijami. Moraš razumeti, da pokrivamo 750.000 eventov letno, torej 2000 na dan. Od tega %60 – %70 športov ni digitalno pokritih. Srbija, Indija, konstantno pada omrežje, ni toliko telefonov. Tako da nimamo vedno neomejeno število podatkov, s katerimi lahko operiramo."

Eng: "In the end, it's a mix of everything. Where we can, we do it ourselves, especially if it's a core part. Somewhere we have to buy, somewhere we collaborate with federations. We also face issues due to cookies, third-party data and GDPR. That's why we currently have a brand-new product where we act as information custodians, anonymized but first-party. Meaning we ourselves have to get everything from them. Then we try to return value to them through advertising. But we can use the data for targeting and so on. It all heavily depends on individual agreements with federations. You have to understand that we cover 750.000 events annually, which is 2.000 per day. Of these, %60 - %70 of sports are not digitally covered. In Serbia, India, the network constantly drops, there aren't as many phones. We don't always have an unlimited amount of data to operate with."

Interviewer:

"Če prav razumem, so torej vaši naročniki v večini federacije?"

Eng: "If I understand correctly, your clients are mostly federations?"

Mr. Žitnik:

"Naš krog je v resnici malo daljši. S federacijami sodelujemo zato, da dobimo najboljše možne podatke. Velik del našega servisa je preprečevanje napačnih oz. goljufivih stav. Takšne stave načeloma dokaj hitro in preprosto zaznamo, in opozorimo federacije. Kakorkoli se sliši paradoksalno, betting v resnici pozitivno vpliva na čistost športa. Manj je nastavljenih tekem. Drugače je to črni trg, ki ga nima noben pod kontrolo. To je ta del, kjer dobivamo podatke. Zdaj pa moramo nekaj z njimi narediti. V drugi obliki jih torej vrnemo federacijam in klubom, oni pa jih potem uporabijo za coaching, analitike in tako naprej. Naš glavni del je naprej prodati podatke, surove ali kot neke produkte, za betting ali pa športno usmerjene medije."

Eng: "Our circle is actually a bit longer. We collaborate with federations to obtain the best possible data. A significant part of our service is preventing incorrect or fraudulent bets. Such bets we generally detect fairly quickly and easily, and alert the federations. Ironically, betting actually positively affects the integrity of sports. There are fewer fixed matches. Otherwise, it's a black market that nobody has control over. That's the part where we get the data. Now we have to do something with them. We return them to federations and clubs in some other form, and they use them for coaching, analytics, and so on. Our main focus is to sell the data, raw or in form of products, for betting or to sports-oriented media."

Interviewer:

"Ali implementacija oz. uporaba vaših rešitev zahteva kakšne strukturne spremembe na strani naročnikov? Morajo zaradi tega koga zaposliti, odpreti nov oddelek, se prestrukturirati?"

Eng: "Does the implementation or use of your solutions require any structural changes on the side of the clients? Do they need to hire anyone, open a new department, restructure?"

Mr. Žitnik:

"Mi imamo 87 različnih produktov, enoznačnega odgovora ni. V idealnem okolju imaš najlažjo možno integracijo, ko imaš nek že dokončno narejen produkt, ki ga lahko takoj integriraš in stranka lahko takoj vidi da dela. S tem si zelo olajšaš stvari v naprej. Moj cilj bi bil, da se zaradi mojega produkta odpre nov oddelek. To je nekaj najlepšega, kar se ti lahko zgodi. Torej, da ima to za njih tako vrednost, da mu posvetijo več kot samo enega človeka. Ampak v začetni fazi damo večino fokusa v čim lažjo integriracijo, se pravi, da oni ne rabijo nobene spremembe. Vsaj na začetku. Potem pa naj se sami odločijo, kakšno vrednost ima za nih in koliko daleč želijo iti. Na roadmap je zelo težko priti. V večini je že zaseden. Ko ti prideš, in bi nekaj delal oz. spremenil, bo to tudi zanj pomenilo spremembe. Noben ne gleda v zrak, da nima kaj za delat. Vsi se med sabo borimo. Zadaj so njihovi core sistemi. Že to zahteva cel kup enega osebja in ukvarjanja. Zato morajo biti stvari, vsaj za začetek, čim bolj preproste, da jih lahko stestirajo."

Eng: "We have 87 different products, so there's no uniform answer. In an ideal environment, you have the easiest possible integration when you have a product that's already fully developed and can be immediately integrated, allowing the client to see that it works right away. This greatly simplifies things going forward. My goal would be for my product to open up a new department. That's one of the best things that can happen. This means it has so much value for them that they dedicate more than just one person to it. But in the initial phase, we focus mainly on making integration as smooth as possible, meaning they don't need any changes. At least not at the beginning. Then they can decide for themselves what value it holds for them and how far they want to go. Getting on the roadmap is very difficult. It's usually already occupied. When you come in and want to do something or make changes, it will also mean changes for them. No one is just wondering around with nothing to do. We're all fighting for attention. In the background there are their core systems. That already requires a whole bunch of staff and dealing with. So, things need to be as simple as possible, at least initially, so they can be tested."

Interviewer:

"Koliko pa se naročniki tega zavedajo pred vpeljavo projekta? Razumejo, kako velike bodo spremembe? Ker včasih se zdi, da ko pride do nekih digitalnih rešitev, organizacije dobijo nek budget in potem morajo nekaj narediti z njim. Dostrikrat niti ne vedo kaj. Morda je to pri večjih ligah drugače."

Eng: "How aware are clients of this before introducing the project? Do they understand how significant the changes will be? Because sometimes when it comes to digital solutions, organizations receive a budget and then they have to do something with it. Often they don't even know what. Perhaps this is different for larger leagues."

Mr. Žitnik:

"Odvisno je od stranke. Imamo stranke, ki nimajo niti enega developerja in samo po potrebi outsourcajo. Imamo pa tudi stranko, ki ima 500 plus developerjev, jih ta del zelo zanima in mu posvetijo veliko fokusa. Oni so naš showcase, ki benchmark postavljajo zelo visoko. Tako da ja, zelo je odvisno od stranke. Odvisno kakšen fokus ima. Je pa opazno, da se digitalizacijska doba končno premika, čeprav počasi. Težko bi sploh ocenil, ampak mislim da lahko rečemo, da je v neki fazi digitalizacije večina firm. So pa, kar se tiče internih sistemov, stvari zelo dostikrat, sploh pri velkih, zelo zastarele. Spremembe zahtevajo ogromno efforta. Velikokrat navzven izgleda lepo, pa potem notri ni tako. To so enormni projekti, kjer vsaka sprememba poruši 3 ostale stebre."

Eng: "It depends on the client. On one hand, we have clients who don't have a single developer and only outsource when needed. On the other hand, we also have a client with 500-plus developers who are very interested in this aspect and dedicate a lot of focus to it. They are our showcase, setting the benchmark very high. So yes, it really depends on the client and what their focus is. It's noticeable that the era of digitization is finally moving forward, albeit slowly. I hardly estimate overall, but I think we can say that most companies are in some stage of digitization. However, when it comes to internal systems, things are often very outdated, especially in larger organizations. Changes require a huge amount of effort. Oftentimes things look good from the outside, but aren't from the inside. These are massive projects where every change affects three other pillars."

Interviewer:

"Kaj pa konjeništvo? Če sem prav razumela v konjeništvu ne delate?"

Eng: "What about equestrian sports? If I understood correctly, you don't work in equestrianism?"

Mr. Žitnik:

"Tukaj mogoče 2 stvari. Konkretno Sportradar ne. Drugače je v bettingu konjeništvo zelo močno, ampak v galopskih dirkah, ne v preskakovanju ovir ali pa dresuri. So pa tudi galopske dirke v upadu. V digitalu niso tako zanimive. Počasi, z generacijami izumira."

Eng: "Here maybe two things. Specifically, Sportradar doesn't. Otherwise, in betting, equestrian sports are very strong, but in horse racing, not in show jumping or dressage. However, horse racing is also in decline. They are not as appealing in the digital realm. Slowly, with generations, it's dying out."

Appendix 5: QA with Mrs. Alicia McLaughlin

Question 1: What is your interpretation of digital fan engagement?

Mrs. McLaughlin: My interpretation of our digital fan engagement is that our equestrian audience is very engaged. This is a goal of our team, to engage fans more frequently on our digital platforms. The adoption process can be slow, but that is typical of all industries.

Question 2: What is the significance of digital fan engagement for your organization?

Mrs. McLaughlin: We have started the shift towards digital fan engagement by utilizing QR codes onsite, creating social media sweepstakes for our sponsors, interacting with fans on our live stream and increasing our digital advertising opportunities for sponsors, advertisers and sponsors. It's very important to us as an organization to stay at the forefront of digital engagement.

Question 3: Which channels do you use for engaging with fans digitally?

Mrs. McLaughlin: The channels that we use to engage with fans digitally are: facebook, instagram, youtube, linkedin, X, tiktok, google ad manager, google ads, gleam.io, our websites, brandwatch, meltwater, constant contact, tripadvisor and google business.

Question 4: What are your digital fan engagement goals? (e.g. increasing reach, loyalty, live attendance, reaching equestrian fan base, reaching non-equestrian fan base, ...)?

Mrs. McLaughlin: Really, these engagement goals are specific to the platform. For example, on social media our engagement goals are to increase our engagement rates and followers. On the website, we want to see user retention and time on page. I worry less about reach and impressions, knowing that if we produce high quality content and story telling that is optimized for the platform that these metrics will come. We also regularly review the top performing content to understand what our fans want to consume.

Question 5: Did you detect any changes in generations and how do you respond to it? (e.g. evolvement of sport content consumption and fan expectations)?

Mrs. McLaughlin: I think we see the same changes that every business that is focused on digital engagement sees which is the younger generations want personalized content and communication.

Question 6: Do you adjust your digital communication strategies in regards to geographical location/age group you're addressing?

Mrs. McLaughlin: One of the most important aspects of digital communication (in my opinion) is meeting our customers where they are at and not forcing them to find us in a specific place. For example, if we are running paid advertising – depending on the event, we

geotarget. If it's general awareness or for our live stream, we broaden our criteria and focus more on interest (such as show jumping). I would say, we are less concerned about tailoring our messaging by age and more concerned about understanding what our audience wants.

Question 7: What are the anticipated future trends in the context of showjumping?

Mrs. McLaughlin: As you probably have seen, I see much more activity happening on social media. It will be interesting to see how the governing bodies (FEI, USEF, etc.) adjust their strategies to meet the demands of their customers. I hope that the future of show jumping on digital platforms allows us to reach an expanded audience and garner new supporters.

Question 8: What are the general concerns or challanges encountered in this area?

Mrs. McLaughlin: I think that diversity, accessibility, accountability and transparency are extremely important and being honest and open with our audience is a primary concern. At times, this can be difficult for a multitude of reasons, but I think focusing on these points is extremely important to our business and to our leadership.

Appendix 6: Transcript of Expert Interview with Mrs. Helena Matjašec

Interviewer:

"Ali se zavedate, da vaše delo, torej prenos konjeniških dogodkov ter ponujanje drugih podobih video vsebin, spada v kategorijo fan engagement oz. digital fan engagement? Je to sploh izraz, ki se v tem športu uporablja?"

Eng: "Are you aware that your work, namely broadcasting of equestrian events and offering other similar video content, falls under the category of fan engagement or digital fan engagement? Is this even a term commonly used in this sport?"

Mrs. Matjašec:

"Razumemo, da nekateri našo dejavnost dojemajo kot fan engagement, ampak se sami ne oziramo na to. Izraza ne uporabljamo. Naš fokus je predvsem zagotavljanje vsebin za ljubitelje konjeništva. Neko vključevanje na digitalni ravni je pri tem obstransko oziroma le rezultat našega dela."

Eng: "We understand that some perceive our activity as fan engagement, but we ourselves do not focus on it. The term is not a part of our terminology. Our primary focus is providing content for equestrian enthusiasts. Engaging fans on a digital level is therefore peripheral, a result of our work."

Interviewer:

"Kakšna je torej vizija za vašim delom?"

Eng: "What is the vision for your work then?"

Mrs. Matjašec:

"Vizija je razširiti dostopnost do vsebin in omogočiti gledalcem, da lahko vsebine spremljajo od doma. Že pred pandemijo je bilo očitno, da za to obstaja trg. Potem pa je s prihodom pandemije povpraševanje po oddaljenih ogledih eksponentno naraslo. Število naročnikov je zelo poraslo. Zato si želimo ljudem ponuditi čim več takšnih in drugačnih vsebin. Cilj ClipMyHorse-a je, da bi vsebine čim več ljudi gledlo. Zato tudi nekatere stvari ponujamo zastonj. Na primer live stream oziroma prenos v živo, pod pogojem da je gledan iz računalnika in pomanjšano, torej ne na full screen."

Eng: "Our vision is to expand accessibility of content and enable viewers to watch it from home. Even before the pandemic, it was evident that there was a market for this. Then, in pandemic, demand for remote viewing surged exponentially. The number of subscribers increased significantly. That's why we want to offer people variety of diverse content. ClipMyHorse's goal is for content to be viewed by as many people as possbile. That's why

we offer some things for free. For example, live streams, if they are watched from a computer and minimized, not in full screen mode.”

Interviewer:

“Pa imate definiran profil naročnika oziroma nekoga, ki ga s svojimi vsebinami nagovarjate? So to že obstoječi ljubitelji konjeništva? Ali tisti, ki jim je ta tema manj poznana?”

Eng: “Do you have a defined profile of a subscriber or someone you want to reach with your content? Would that be existing horse riding enthusiasts? Or those who are less familiar with this topic?”

Mrs. Matjašec:

“Definitivno so to že obstoječi ljubitelji koneništva. Si pa želimo nagovarjati čim širši spekter. Torej da vsebino najde vsak, ne glede na to kdo je. Se pravi ali tekmovalec, ali starš, ali trener, ali rejec. In pa ne glede na nivo znanja, izkušenje, disciplino. Zato se trudimo ustvarjati raznolike vsebine. Prenašamo tekme, licenciranja, avkcije. Pokrivamo različne discipline. V zadnjem času veliko časa posvetimo tudi intervjujem in posnetkom iz zakulisja. Pa izobraževalnim videom kot so treningi in kurzi.”

Eng: “These are definitely already existing equestrian lovers. We aim to reach a spectrum as wide as possible. So that everyone can find content, regardless of who they are. Whether they are a competitor, a parent, a coach, or a breeder. And regardless of their level of knowledge, experience, or discipline. That's why we want to create diverse content. We broadcast competitions, licensing, auctions. We cover different disciplines. Recently, we've dedicated a lot of time to interviews and behind-the-scenes footage, as well as educational videos such as training sessions and courses.”

Interviewer:

“Kako pa izbirate turnirje oz. dogodke, ki jih pokrivate?”

Eng: “How do you choose the competitions or events to cover?”

Mrs. Matjašec:

“V večini kar oni, torej organizatorji, kontaktirajo nas. Z večino sodelujemo stalno in to že več let. Imamo pa pri tem popolno svobodo. Krovni ClipMyHorse je v Nemčiji. Oni se ne obremenjujejo s tem, katere turnirje pokrivamo in katere ne. Tudi naših odločitev oziroma vsebin noben ne potrjuje.”

Eng: “In most of the cases the organizers themselves contact us. We have an ongoing collaboration through several years with the majority of them. We have complete freedom in this regard. The parent ClipMyHorse organization is based in Germany. They do not

concern themselves with which tournaments we cover or not. No one is approving our decisions or content."

Interviewer:

"So kakšne razlike v vašem delu v Sloveniji, Avstriji, na Slovaškem…?"

Eng: "Are there any differences in your work in Slovenia, Austria, Slovakia, …?"

Mrs. Matjašec:

"Ne, povsod delamo čisto enako. Po istem kopitu se dela po celi regiji. Tudi ClipMyHorse drugod po svetu dela enako. Le v začetku smo dobili neke univerzalne smernice."

Eng: "No, we work exactly the same everywhere. The same approach is used throughout the entire region. ClipMyHorse operates similarly in other parts of the world as well. We only received some universal guidelines at the beginning.

Appendix 7: ClipMyHorse Annual Reports

2019 report, p1.

2019 report, p2.

ClipMyHorse.TV

Daily Membership Development - Ranking
Trial & paying Premium Membership development over time and per country

Country ▼

Premium Members
119,375

Legend:
- Active
- Non R...
- In Trial
- Paused

120K
6,761
7,280
103,057
100K

80K

60K

40K

20K

0
Apr 29, 2024

					Type / Number
Country	Paused	Non Renewing	In Trial	Active	Grand total
DE	708	2,853	998	33,299	**37,858**
US	108	931	2,474	15,693	**19,206**
GB	86	528	920	8,928	**10,462**
NL	249	323	161	6,603	**7,336**
FR	363	339	408	5,848	**6,958**
BE	232	154	119	4,737	**5,242**
Grand total	**2,277**	**7,280**	**6,761**	**103,057**	**119,375**

Pie chart:
- DE 31.7%
- US 16.1%
- GB 8.8%
- NL
- FR
- BE
- CH
- DK
- AT
- others 17.7%

Jan 1, 2019 - Dec 31, 2019 ▼

Number

1

0.5

0

-0.5

-1

32

2019 report, p3.

ClipMyHorse.TV

Website

User Country ▾   Jan 1, 2019 - Dec 31, 2019 ▾

— Stream Views   — Users

Stream Views
No data

Users
0

Mobile App

— Users   — video_view

Stream Views
No data

Users
106,523

2019 report, p4.

2019 report, p5.

ClipMyHorse.TV

Invalid/Missing dimensions, metrics, or filters.
See details

Trial Month
Debt Collection   3,064
Paid - Active   40,159

Growth
4,268
(new registrations minus cancel)

New Trial Months
No data

New Cancellations
15,288

Membership Cancel
12,764

Trial Cancel
2,532

Feb 17, 2019

What are the top countries by new trial registrations & cancellations?

■ Trial Total   ■ Cancellations Total

Germany	7,858 / 10,228
United Kingdom	2,402 / —1,195
France	—1,235 / —495
Netherlands	—1,127 / —553
Belgium	—1,094 / —431

0   2K   4K   6K   8K   10K   12K

Which Event generated most watchtime? (live & archive - all users)

No data

Locale	▼	Jan 1, 2019 - De ▼

Country	Trial total	Cancellations	User	conv.rate
No data				
Grand total	19,556	15,288	2,004,978	0.98%

Which Discipline generated most watchtime?

● Show Jumping
● Dressage
● Stallion Lice...
● Presentation
● Miscellaneo...
● Stallion Show
● Auction
● Vaulting
● Eventing
● others

56%
23.7%

35

2020 report, p1.

ClipMyHorse.TV

Premium Members
119,375

Legend:
- Paused
- In Trial
- Non Renewing
- Active

Stacked bar (Apr 29, 2024):
- 6,761 (In Trial)
- 7,280 (Non Renewing)
- 103,057 (Active)

New Paying Members
380

New Trials
2,238

Cancellations
Paying Members
127

Trial
No data

Country ▾   Jan 1, 2020 - Dec 31, 2020 ▾

What are the top countries by new trial registrations?

New Trials

- Germany — 1,260
- Netherlands — 178
- Austria — 111
- United States — 111
- Great Britain — 102

(x-axis: 0, 200, 400, 600, 800, 1K, 1.2K, 1.4K)

	Country	New Trials ▾
1.	Germany	1,260
2.	Netherlands	178
3.	Austria	111
4.	United States	111
5.	Great Britain	102
6.	Belgium	83
7.	Switzerland	71
8.	Norway	65
9.	France	48
10.	Spain	25
	Grand total	2,238

1 - 48 / 48 ⟨ ⟩

Which Event generated most watchtime? (live & archive - all users)

Country ▾

No data

Which Discipline generated most watchtime?

No data

36

2020 report, p2.

Daily Membership Development - Ranking
Trial & paying Premium Membership development over time and per country

Country ▼

Premium Members
119,375

Country	Paused	Non Renewing	In Trial	Active	Grand total
DE	708	2,853	998	33,299	**37,858**
US	108	931	2,474	15,693	**19,206**
GB	86	528	920	8,928	**10,462**
NL	249	323	161	6,603	**7,336**
FR	363	339	408	5,848	**6,958**
BE	232	154	119	4,737	**5,242**
Grand total	**2,277**	**7,280**	**6,761**	**103,057**	**119,375**

Type / Number

● DE
● US
● GB
● NL
● FR
● BE
● CH
● DK
● AT
● others

Jan 1, 2020 - Dec 31, 2020 ▼

Number

2020 report, p3.

ClipMyHorse.TV

Website

User Country ▾   Jan 1, 2020 - Dec 31, 2020 ▾

— Stream Views   — Users

Stream Views
No data

Users
0

Mobile App

— Users   — video_view

Stream Views
No data

Users
129,956

2020 report, p4.

2020 report, p5.

ClipMyHorse.TV

Invalid/Missing dimensions, metrics, or filters.
See details

Trial Month
Debt Collection
Paid - Active

1,234
3,238
42,234

Growth
4,034
(new registrations minus cancel)

New Trial Months
35,438

New Cancellations
31,404

Membership Cancel
12,638

Trial Cancel
18,803

Apr 1, 2020

What are the top countries by new trial registrations & cancellations?

■ Trial Total   ■ Cancellations Total

Germany — 14,533 / 18,002
United Kingdom — 4,333 / 3,287
United States — 2,332 / 1,187
Norway — 2,132 / 1,158
Netherlands — 1,839 / 1,722

0   5K   10K   15K   20K

Which Event generated most watchtime?
(live & archive - all users)

● K+K Cup Münster
● Partner Pferd Leipzig
● Bundeschampionat d...
● Late Entry Riesenbec...
● Internationale Deuts...
● Jumping Amsterdam
● Hannoveraner Hengs...
● LONGINES CSI BASEL
● Bundeschampionate...
● others

86.1%

Locale ▾   Jan 1, 2020 - De ▾

Country	Trial total	Cancellations	User	conv.rate
Germany	14,533	18,002	837,291	1.74%
United Kingdom	4,333	3,287	107,505	4.03%
United States	2,332	1,187	87,819	2.66%
Norway	2,132	1,158	31,500	6.77%
Netherlands	1,839	1,722	163,364	1.13%
France	1,497	1,012	91,499	1.64%
Austria	1,214	652	61,363	1.98%
Belgium	1,178	645	89,361	1.32%
Denmark	1,165	892	28,086	4.15%
Switzerland	756	395	47,694	1.59%
Grand total	**35,438**	**31,404**	**1,706,613**	**2.08%**

1 - 10 / 210 ‹ ›

Which Discipline generated most watchtime?

● Show Jumping
● Dressage
● Stallion Lice...
● Stallion Show
● Presentation
● Miscellaneo...
● Other tests
● Auction
● Eventing
● others

54.9%
20.9%

40

2021 report, p1.

41

2021 report, p2.

Daily Membership Development - Ranking
Trial & paying Premium Membership development over time and per country

Country ▼

Premium Members
119,375

Legend:
- Active (dark red)
- Non R... (orange)
- In Trial (yellow)
- Paused (brown)

Bar chart values:
- 6,761
- 7,280
- 103,057

Y-axis: 120K, 100K, 80K, 60K, 40K, 20K, 0

X-axis: Apr 29, 2024

Country	Paused	Non Renewing	In Trial	Active	Grand total
DE	708	2,853	998	33,299	**37,858**
US	108	931	2,474	15,693	**19,206**
GB	86	528	920	8,928	**10,462**
NL	249	323	161	6,603	**7,336**
FR	363	339	408	5,848	**6,958**
BE	232	154	119	4,737	**5,242**
Grand total	**2,277**	**7,280**	**6,761**	**103,057**	**119,375**

Pie chart (Type / Number):
- DE 31.7%
- US 16.1%
- GB 8.8%
- NL
- FR
- BE
- CH
- DK
- AT
- others 17.7%

Jan 1, 2021 - Dec 31, 2021 ▼

Number (line chart)

Y-axis: 1, 0.5, 0, -0.5, -1

42

2021 report, p3.

ClipMyHorse.TV

Website

User Country ▾   Jan 1, 2021 - Dec 31, 2021 ▾

— Stream Views — Users

Stream Views
No data

Users
0

Mobile App

— Users — video_view

Stream Views
No data

Users
202,445

2021 report, p4.

Daily Membership Development - Top 20 Countries
Mouse over graph for details - Numbers include trial and paying members

2021 report, p5.

ClipMyHorse.TV

Invalid/Missing dimensions, metrics, or filters.
See details

- Trial Month
- Debt Collection
- Paid - Active

4,221
4,452
69,424

Growth
13,434
(new registrations minus cancel)

New Trial Months
67,624

New Cancellations
54,190

Membership Cancel
19,019

Trial Cancel
35,226

Nov 1, 2021

What are the top countries by new trial registrations & cancellations?

- Trial Total
- Cancellations Total

Country	Trial Total	Cancellations
Germany	20,937	25,976
United Kingdom	9,343	6,392
United States	7,286	3,762
France	3,875	2,541
Netherlands	3,255	2,322

Which Event generated most watchtime? (live & archive - all users)

- CHIO Aachen
- FEI Dressage Europe...
- Longines FEI Jumpin...
- Horses & Dreams m...
- Bundeschampionate
- LONGINES BALVE OP...
- NEURO SOCKS AMA...
- Verden International...
- 57. Maimarkt Turnier...
- others

83.8%

Locale

Jan 1, 2021 - De

Country	Trial total	Cancellations	User	conv.rate
Germany	20,937	25,976	1,039,169	2.01%
United Kingdom	9,343	6,392	188,241	4.96%
United States	7,286	3,762	201,851	3.61%
France	3,875	2,541	161,391	2.4%
Netherlands	3,255	2,322	202,691	1.61%
Switzerland	2,217	1,117	91,844	2.41%
Spain	2,179	1,416	72,335	3.01%
Denmark	2,153	1,575	54,100	3.98%
Belgium	2,082	852	131,028	1.59%
Austria	1,971	1,247	85,616	2.3%
Grand total	**67,624**	**54,190**	**2,625,928**	**2.58%**

1 - 10 / 225

Which Discipline generated most watchtime?

- Show Jumping
- Dressage
- Stallion Show
- Stallion Lice...
- Vaulting
- Eventing
- Presentation
- Miscellaneo...
- Auction
- others

19% 59.1%

45

2022 report, p1.

2022 report, p2.

Daily Membership Development - Ranking
Trial & paying Premium Membership development over time and per country

Country ▼

Premium Members
119,375

Legend:
- Active (dark red)
- Non R... (orange)
- In Trial (yellow)
- Paused (brown)

Bar chart values:
- 6,761
- 7,280
- 103,057

Y-axis: 120K, 100K, 80K, 60K, 40K, 20K, 0
X-axis: Apr 29, 2024

Country	Paused	Non Renewing	In Trial	Active	Grand total
DE	708	2,853	998	33,299	37,858
US	108	931	2,474	15,693	19,206
GB	86	528	920	8,928	10,462
NL	249	323	161	6,603	7,336
FR	363	339	408	5,848	6,958
BE	232	154	119	4,737	5,242
Grand total	2,277	7,280	6,761	103,057	119,375

Type / Number

Pie chart:
- DE 31.7%
- US 16.1%
- GB 8.8%
- NL
- FR
- BE
- CH
- DK
- AT
- others 17.7%

Jan 1, 2022 - Dec 31, 2022 ▼

Number

Y-axis: 1, 0.5, 0, -0.5, -1

2022 report, p3.

2022 report, p4.

Daily Membership Development - Top 20 Countries
Mouse over graph for details - Numbers include trial and paying members

Country

Country	Premium Members ▾
No data	

Legend: DE US GB NL FR BE DK CH AT SE ES NO CA AU IE IT FI PL BR MX

49

2022 report, p5.

ClipMyHorse.TV

What are the top countries by new trial registrations & cancellations?

Legend: Trial Total (green), Cancellations Total (red)

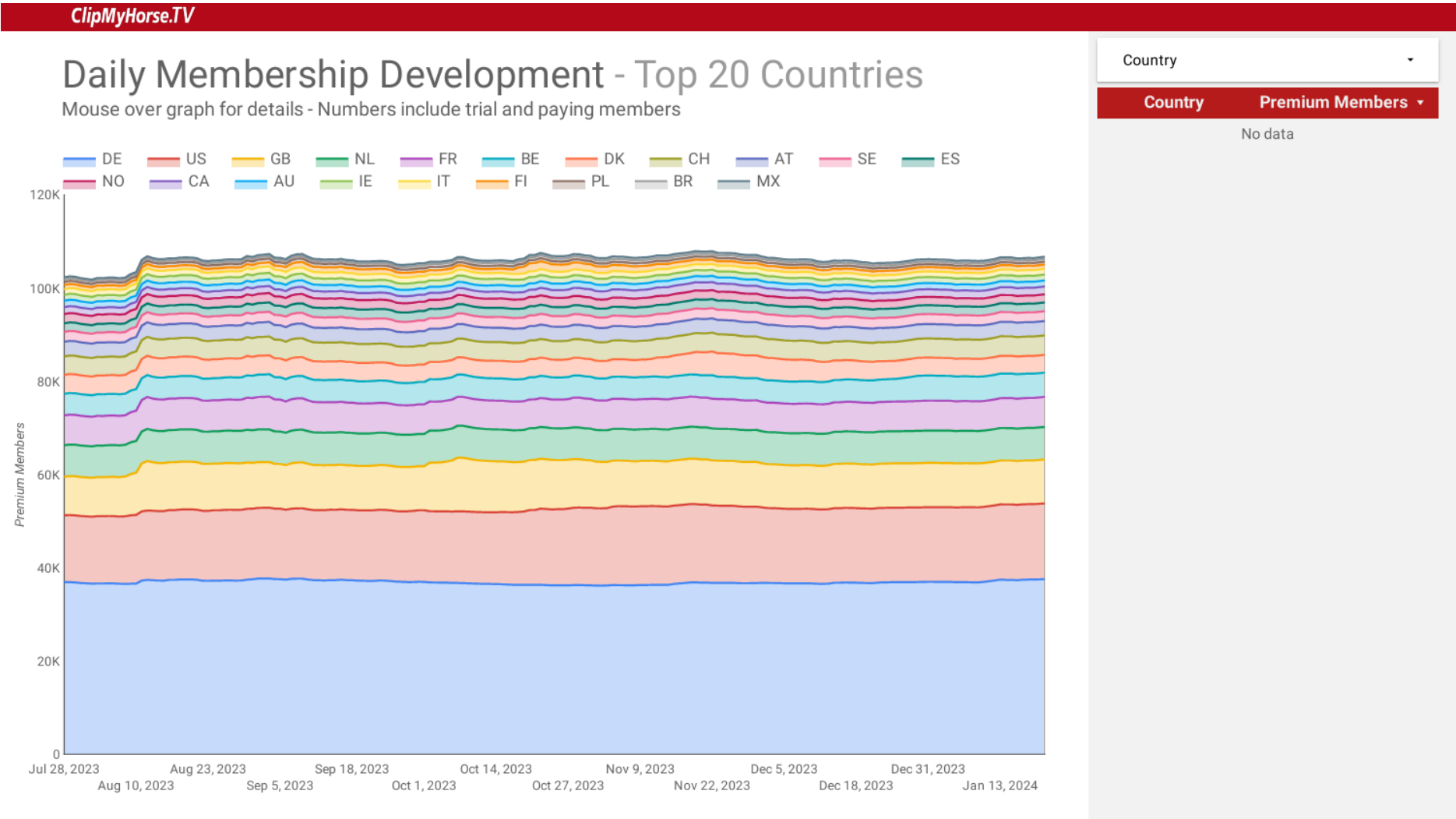| Country	Trial Total	Cancellations Total
Germany	23,638	20,798
United States	18,896	6,312
United Kingdom	12,042	4,592
France	8,233	2,009
Netherlands	4,375	1,648

Stacked bar chart (Oct 24, 2022):
- Paid - Active: 87,148
- Debt Collection: 5,213
- Trial Month: 5,151

Growth
50,383
(new registrations minus cancel)

New Trial Months
95,799

New Cancellations
45,416

Membership Cancel
20,953

Trial Cancel
24,543

Locale — Jan 1, 2022 - De...

Country	Trial total	Cancellations	User	conv.rate
Germany	23,638	20,798	1,174,546	2.01%
United States	18,896	6,312	506,069	3.73%
United Kingdom	12,042	4,592	223,775	5.38%
France	8,233	2,009	216,975	3.79%
Netherlands	4,375	1,648	212,832	2.06%
Denmark	2,742	1,465	69,151	3.97%
Spain	2,186	870	78,800	2.77%
Belgium	2,133	684	138,252	1.54%
Norway	1,923	706	41,775	4.6%
Switzerland	1,828	566	94,415	1.94%
Grand total	95,799	45,416	3,149,515	3.04%

1 - 10 / 222

Which Event generated most watchtime? (live & archive - all users)

- ECCO FEI World Cha...
- CHIO Aachen
- Partner Pferd Leipzig...
- FEI Eventing World C...
- Stuttgart German M...
- HKM Bundeschampi...
- FEI World Cup™ Jum...
- Horse of the Year Sh...
- Horses & Dreams m...
- others

9%, 74.8%

Which Discipline generated most watchtime?

- Show Jumping
- Dressage
- Eventing
- Stallion Show
- Stallion Lice...
- Vaulting
- Auction
- Miscellaneo...
- Presentation
- others

64.2%, 19.1%

50
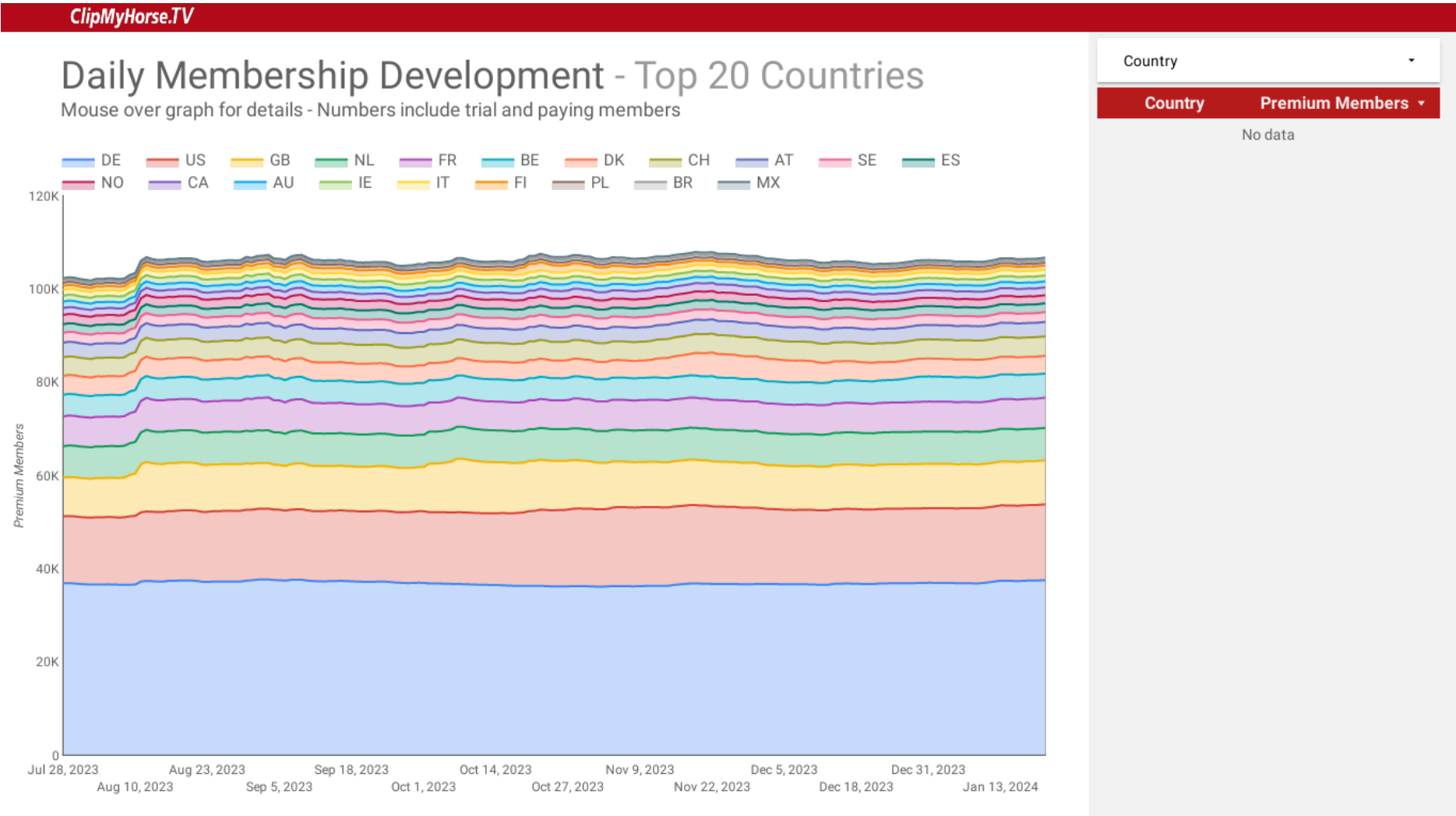
2023 report, p1.

2023 report, p2.

Daily Membership Development - Ranking

Trial & paying Premium Membership development over time and per country

Country

Premium Members

119,375

Country	Paused	Non Renewing	In Trial	Active	Grand total
				Type / Number	
DE	708	2,853	998	33,299	37,858
US	108	931	2,474	15,693	19,206
GB	86	528	920	8,928	10,462
NL	249	323	161	6,603	7,336
FR	363	339	408	5,848	6,958
BE	232	154	119	4,737	5,242
Grand total	2,277	7,280	6,761	103,057	119,375

Jan 1, 2023 - Dec 31, 2023

2023 report, p3.

ClipMyHorse.TV

Website — User Country — Jan 1, 2023 - Dec 31, 2023

— Stream Views — Users

Stream Views
9,677,295

Users
1,142,261

Mobile App

— Users — video_view

Stream Views
20,415,514

Users
231,579

2023 report, p4.

Daily Membership Development - Top 20 Countries
Mouse over graph for details - Numbers include trial and paying members

2023 report, p5.

ClipMyHorse.TV

What are the top countries by new trial registrations & cancellations?

- Trial Total
- Cancellations Total

Country	Trial total	Cancellations	User	conv.rate
United States	15,442	2,322	534,126	2.89%
Germany	13,855	6,176	769,060	1.8%
United Kingdom	4,691	578	110,765	4.24%
Netherlands	2,252	376	136,247	1.65%
France	1,887	390	120,804	1.56%
Denmark	1,578	337	41,522	3.8%
Sweden	1,146	174	43,150	2.66%
Switzerland	970	163	63,680	1.52%
Austria	969	166	51,442	1.88%
Spain	848	172	40,581	2.09%
Grand total	**52,755**	**12,468**	**2,175,458**	**2.43%**

1 - 10 / 223

Growth
40,287
(new registrations minus cancel)

New Trial Months
52,755

New Cancellations
12,468

Membership Cancel
11,286

Trial Cancel
1,185

Which Event generated most watchtime? (live & archive - all users)

- CHIO Aachen
- Land Rover Kentucky...
- The FEI World Cup™...
- Deutsches Spring- u...
- Jumping Amsterdam...
- Longines CHI Classi...
- The Dutch Masters / ...
- The Devon Horse Sh...
- Partner Pferd Leipzig...
- others

Which Discipline generated most watchtime?

- Show Jumping
- Springen
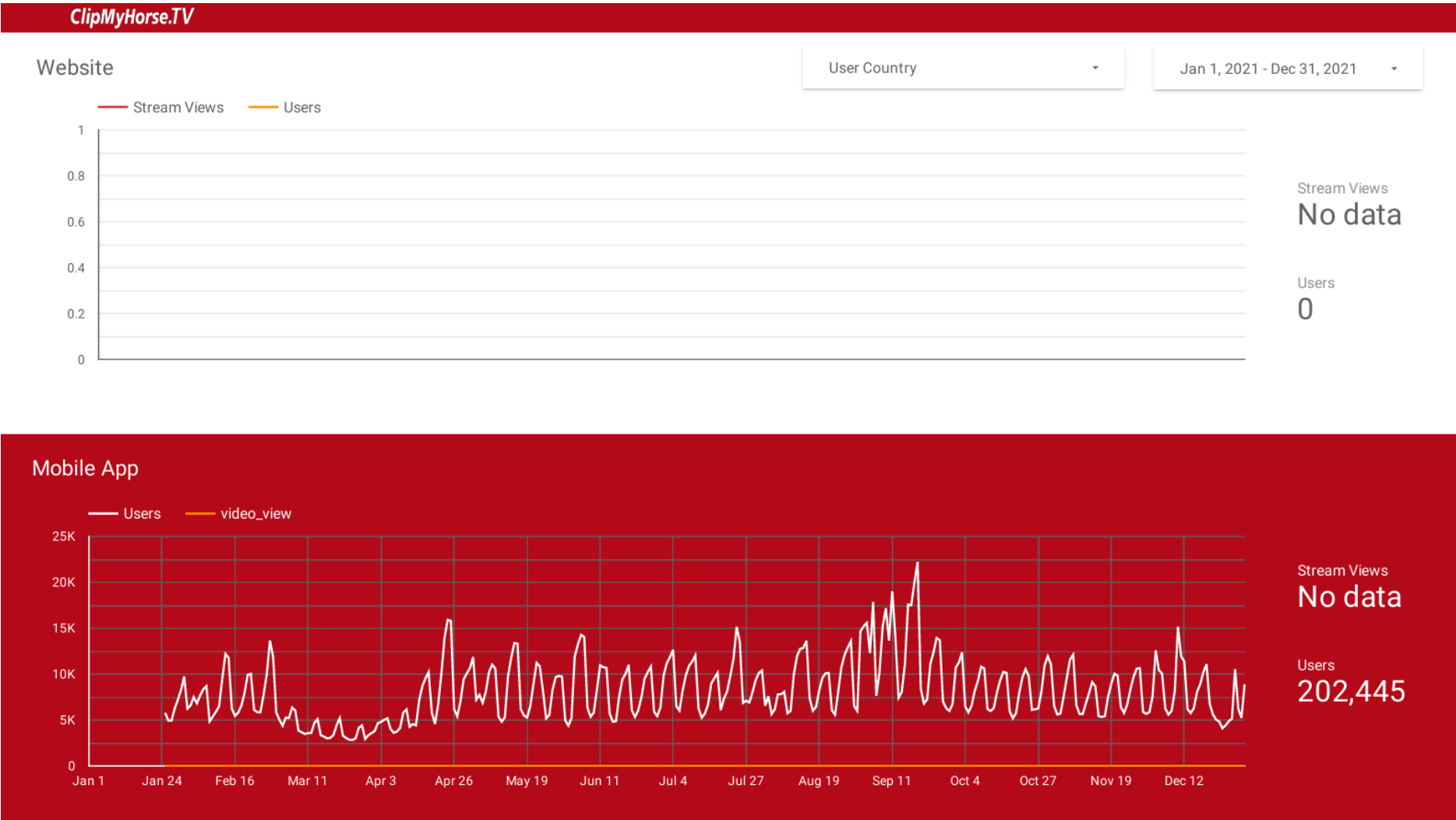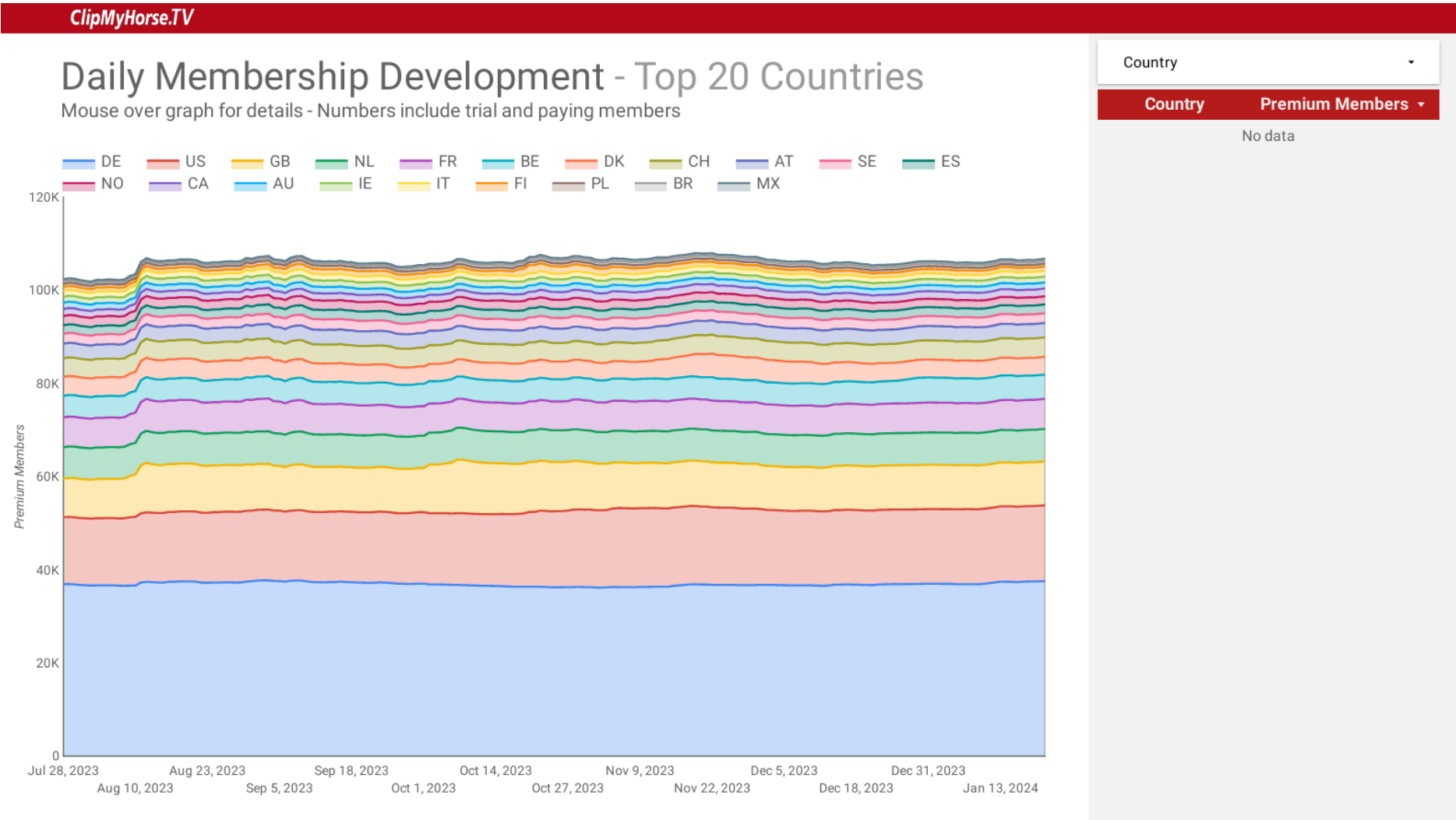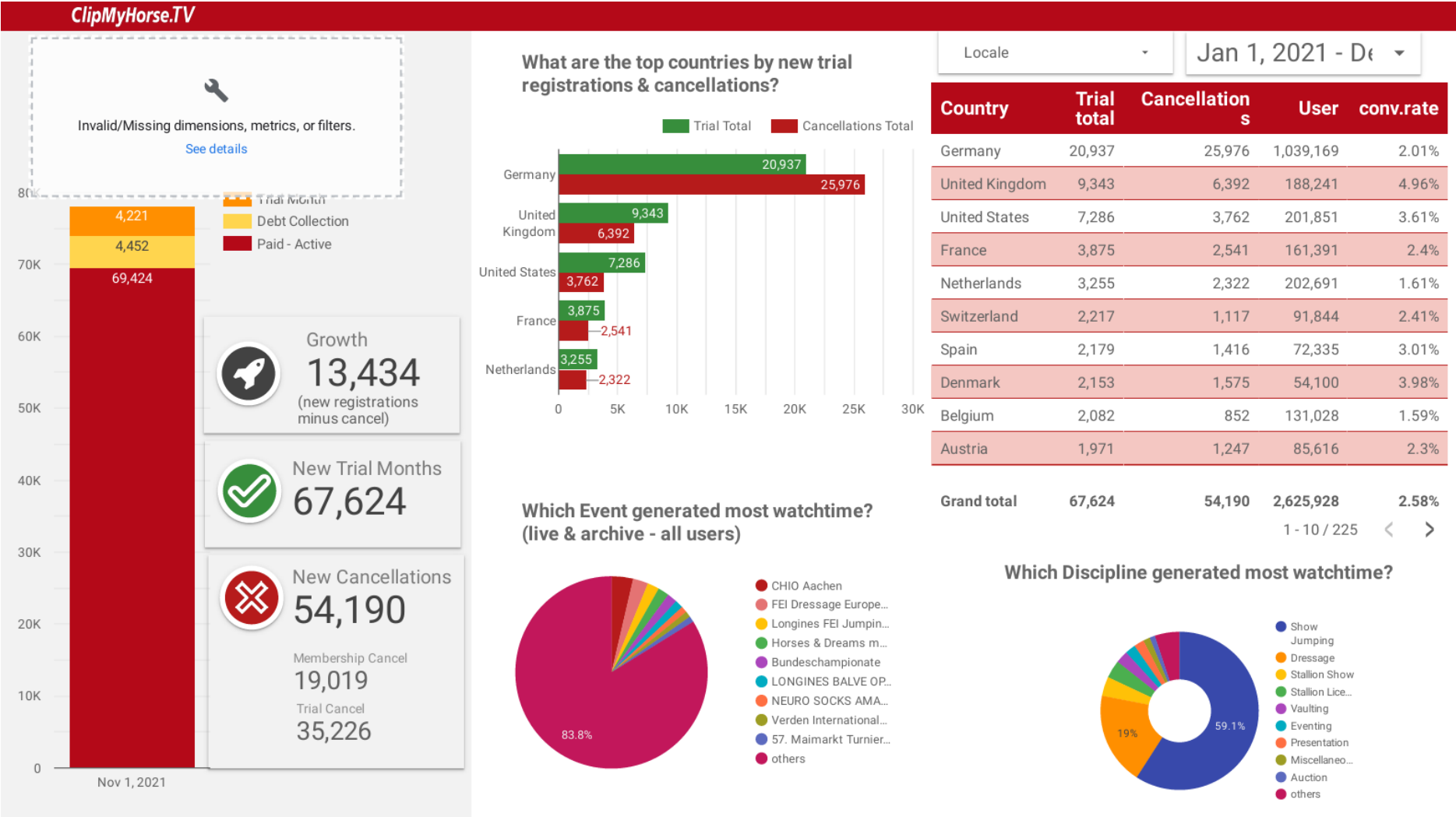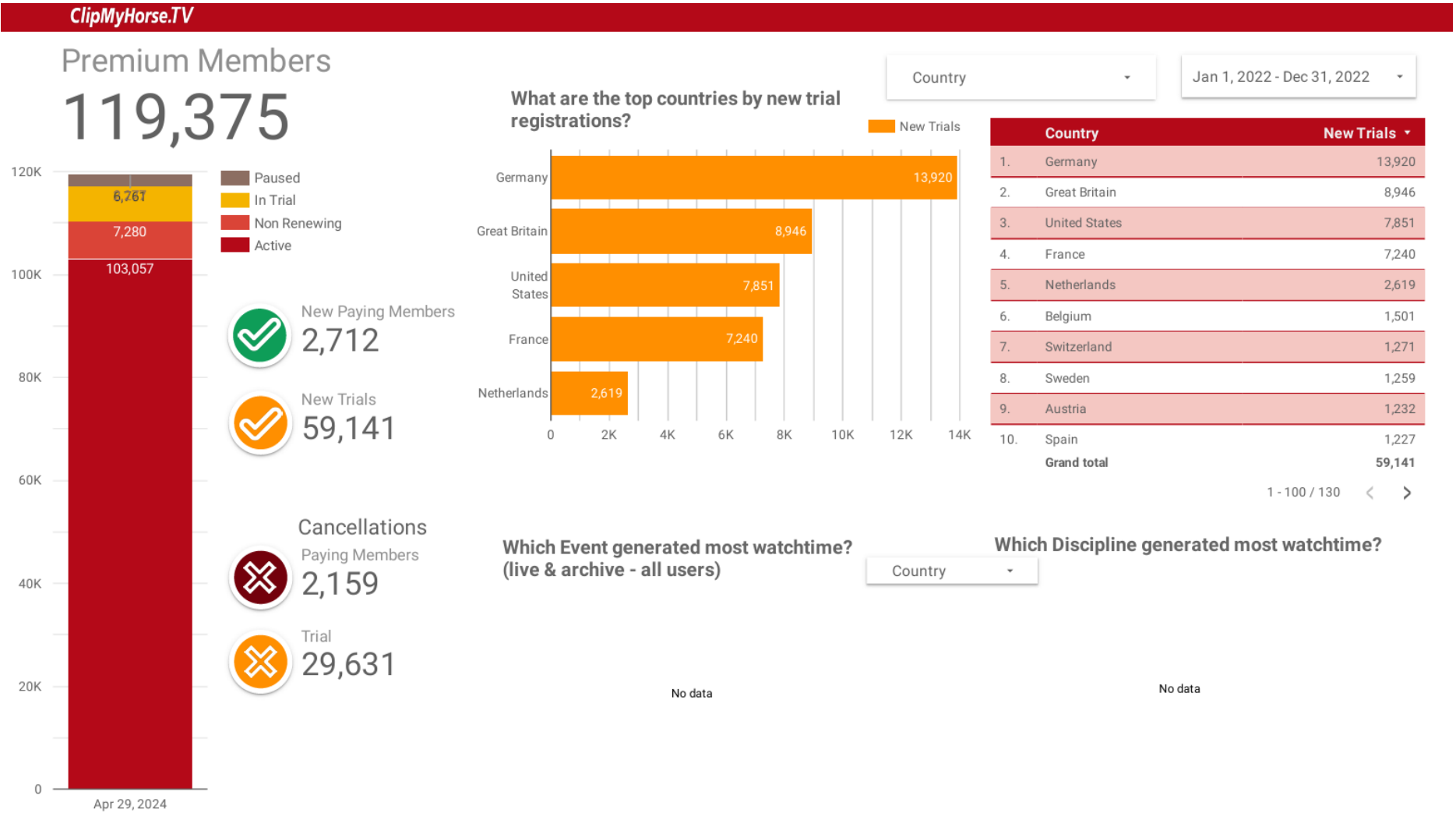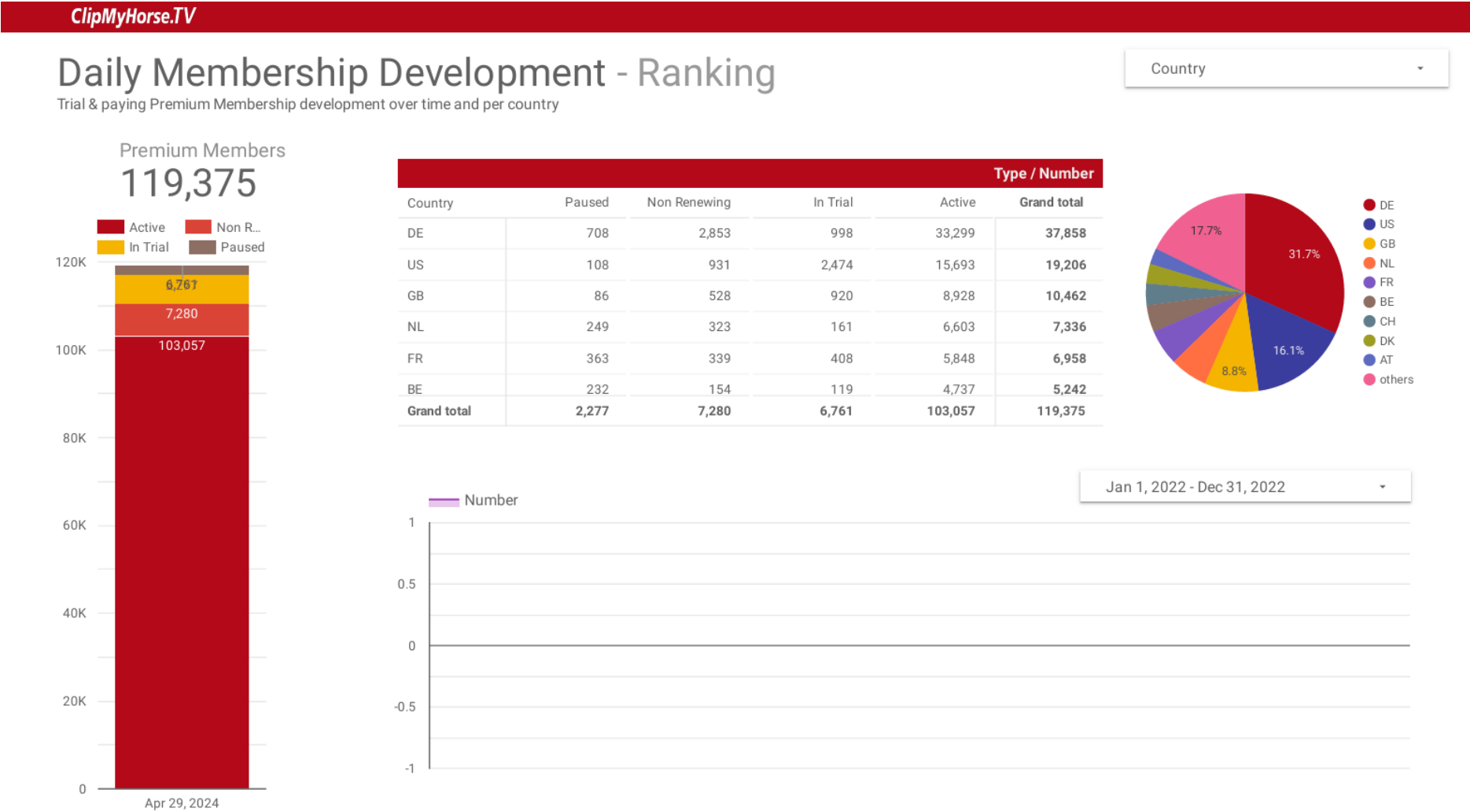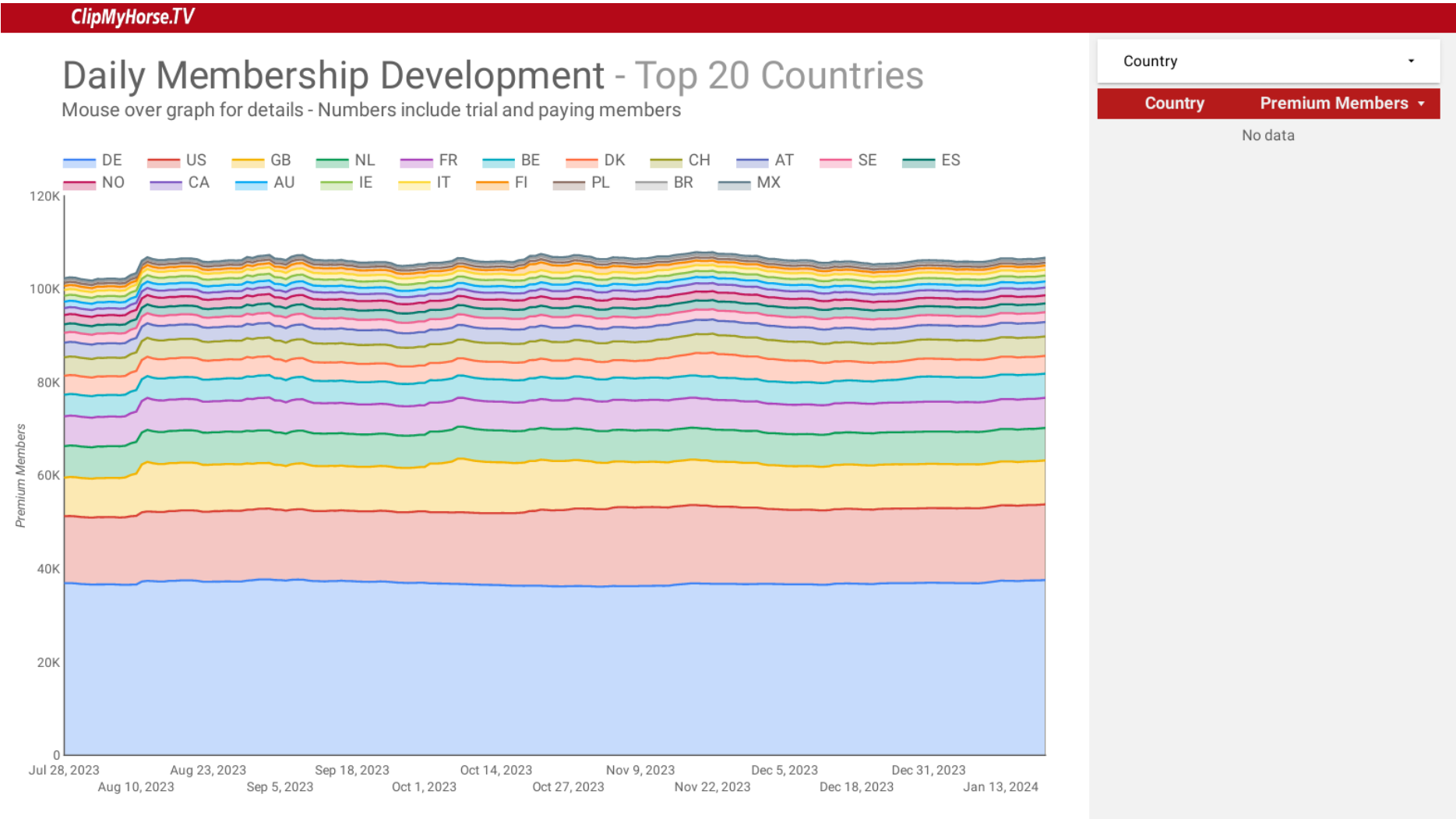- Dressage
- Eventing
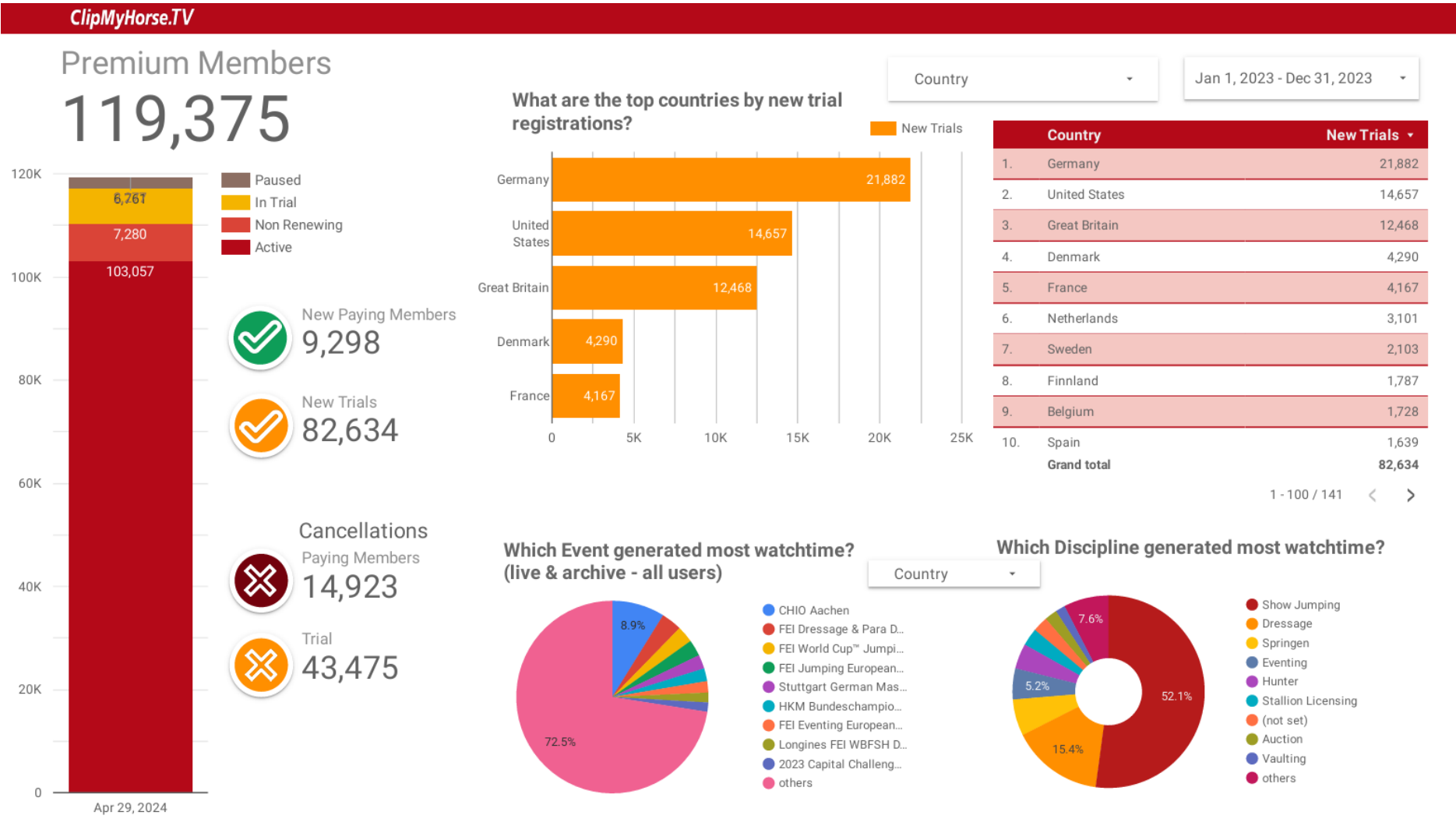- Stallion Lice...
- Dressur
- Hunter
- Stallion Show
- Miscellaneo...
- others

55

2024 report, p1.

2024 report, p2.

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Daily Membership Development - Ranking
Trial & paying Premium Membership development over time and per country

Country ▾

Premium Members
119,375

- Active
- Non R...
- In Trial
- Paused

	Type / Number				
Country	Paused	Non Renewing	In Trial	Active	Grand total
DE	708	2,853	998	33,299	**37,858**
US	108	931	2,474	15,693	**19,206**
GB	86	528	920	8,928	**10,462**
NL	249	323	161	6,603	**7,336**
FR	363	339	408	5,848	**6,958**
BE	232	154	119	4,737	**5,242**
Grand total	**2,277**	**7,280**	**6,761**	**103,057**	**119,375**

Pie chart legend: DE 31.7%, US 16.1%, GB 8.8%, NL, FR, BE, CH, DK, AT, others 17.7%
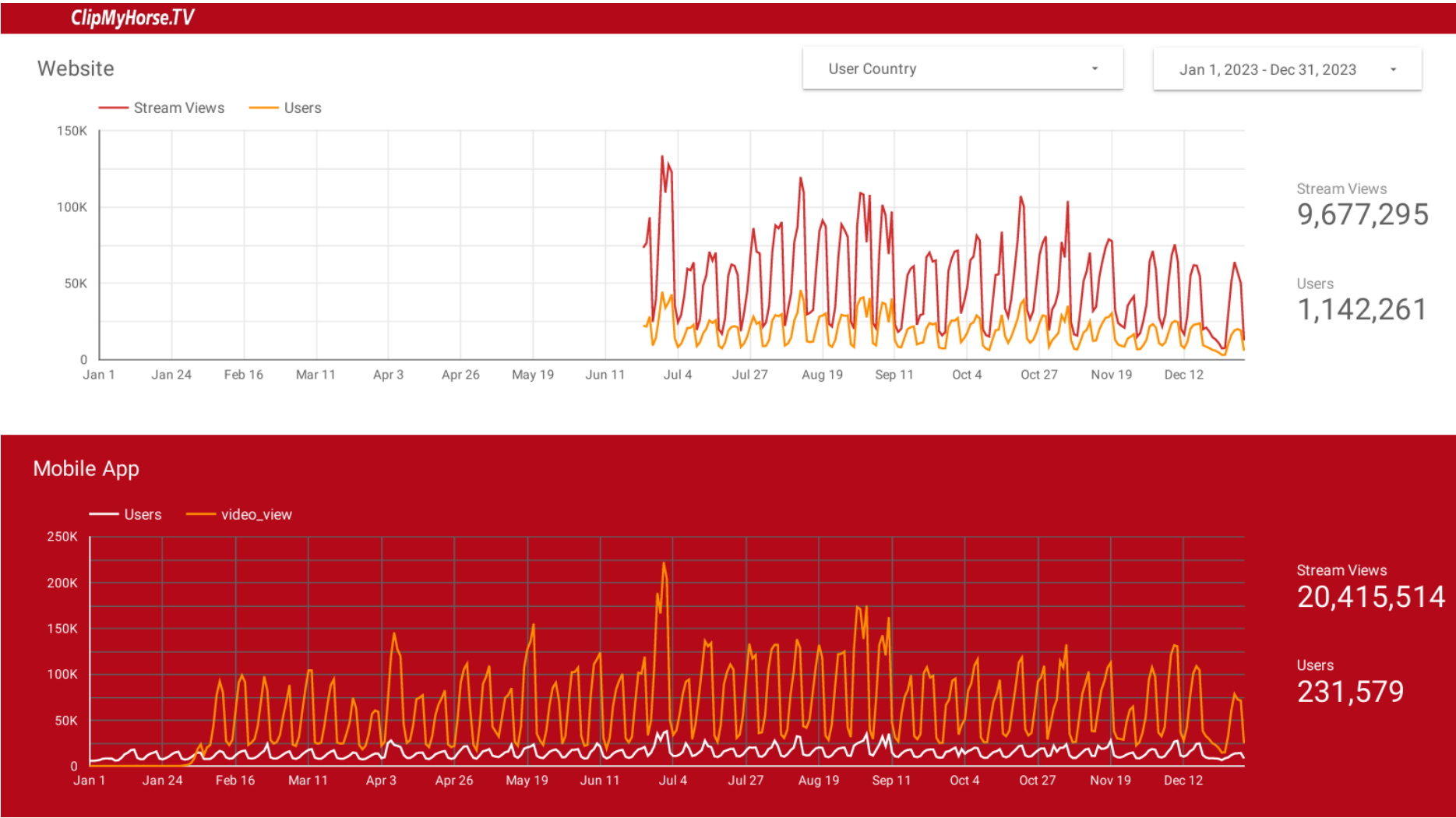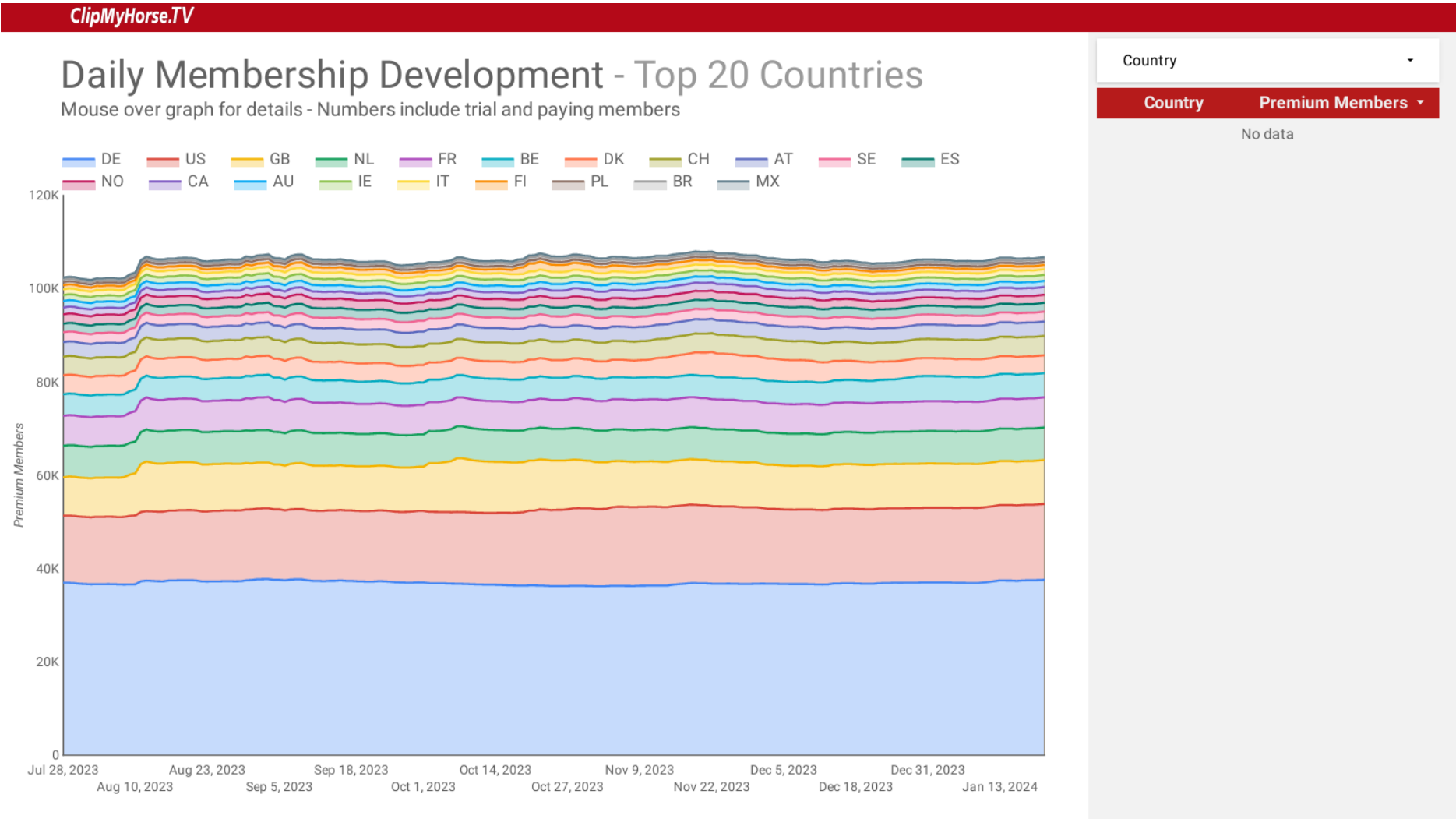
Time series: Active, Non Renewing, In Trial, Paused — Jan 1, 2024 - Apr 29, 2024

2024 report, p3.

2024 report, p4.

Daily Membership Development - Top 20 Countries
Mouse over graph for details - Numbers include trial and paying members

2024 report, p4.

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Invalid/Missing dimensions, metrics, or filters.
See details

2,571
3,273
105,576

Trial Month
Debt Collection
Paid - Active

Growth
No data
(new registrations minus cancel)

New Trial Months
No data

New Cancellations
No data

Membership Cancel
No data

Trial Cancel
No data

Jan 2, 2024

What are the top countries by new trial registrations & cancellations?

Trial Total   Cancellations Total

| | -1 | -0.5 | 0 | 0.5 | 1 |

Which Event generated most watchtime? (live & archive - all users)

No data

Locale   Jan 1, 2024 - A

Country	Trial total	Cancellations	User	conv.rate
No data				

Grand total   null   null   null   null

Which Discipline generated most watchtime?

No data

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