

Sports fans on sustainability:

What do they say and
what does this mean
for organisations?



INTRODUCTION

Sporting organisations can **no longer afford to ignore** sustainability.

Not only is climate change, resource depletion, and social inequality impacting society at large, it is also directly impacting sporting events. Authorities have already made adjustments to events to mitigate these impacts – and will continue to do so as the issues become more acute.

We have seen examples across the globe including:

- + The US Open was forced to implement a new tournament policy that allows players to take a 'heat break' during matches due to rising temperatures.
- + Studies have shown that around half of the former Winter Olympics host cities won't be able to host the event Games by 2050 due to a lack of snow and ice.
- + Some sports associations, such as Major League Soccer (MLS) or Alberta Soccer in Canada, have established air quality and temperature safety thresholds to regulate holding events during hot weather events and pollution peaks.

However, sports organisations aren't passive observers of these changes, Sporting companies are also guilty of contributing to climate change. Though it's difficult to measure the magnitude of this impact, a report by the Rapid Transition Alliance has estimated that the sector contributes the same level of emissions as a medium-sized country.

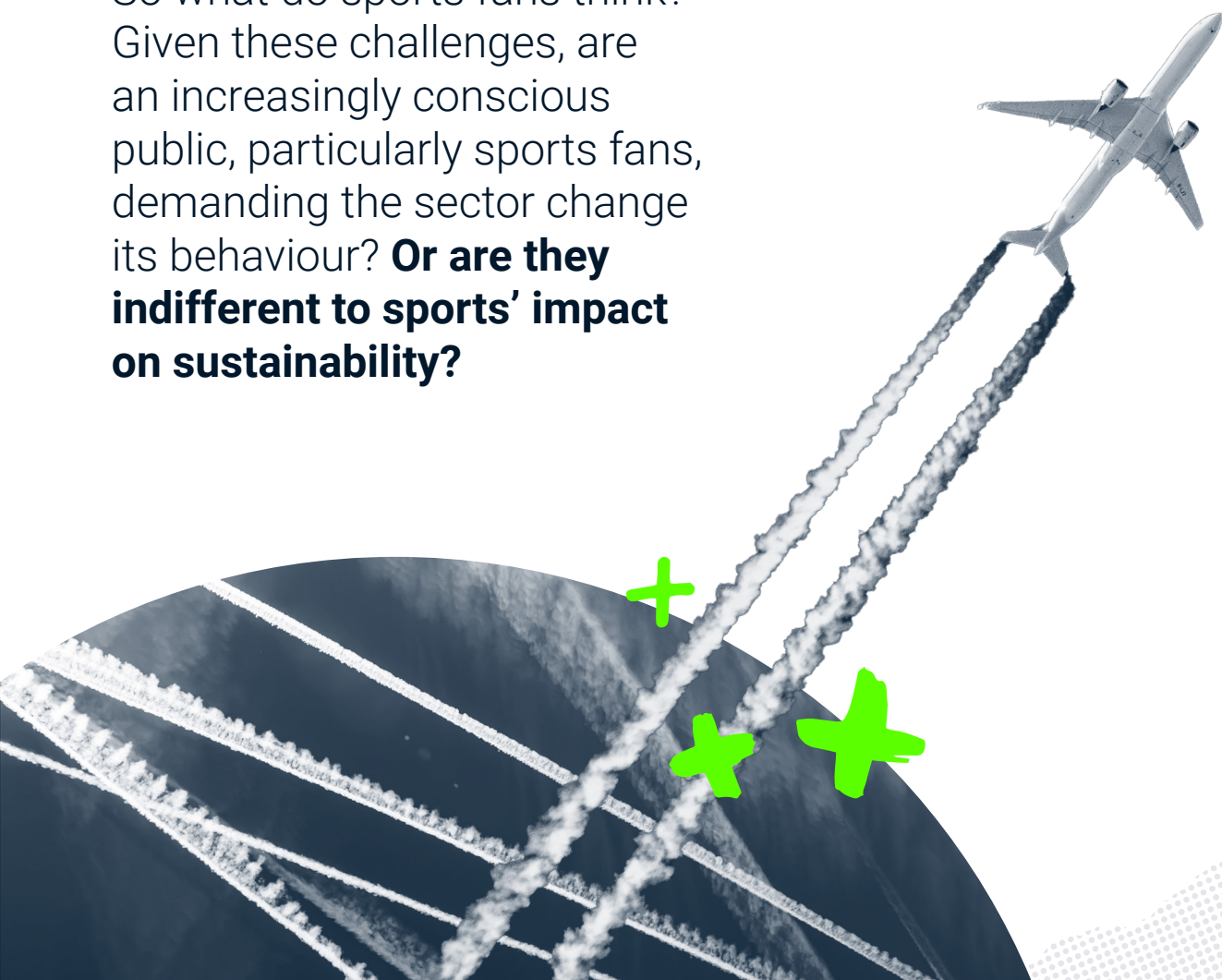


Carbon accounting firm Greenly estimates that just the shuttle flights alone from other Gulf countries to Qatar during the 2022 Fifa Qatar World Cup resulted in between 6,000 and 8,000 tonnes of CO₂e emissions being released. This is equal to the emissions produced by driving at least 1,246 times the circumference of the Earth in a car. The governing body has been reprimanded by regulator the Swiss Fairness Commission over claims that the event was the first 'fully-carbon neutral World Cup'.

So what do sports fans think? Given these challenges, are an increasingly conscious public, particularly sports fans, demanding the sector change its behaviour? **Or are they indifferent to sports' impact on sustainability?**

In order to answer this question, the sustainability measurement and management platform, FuturePlus, worked with text analytics specialist Relative Insight to ascertain whether fans' conversations around this aspect of sport have changed.

We analysed online conversations from the past five years to see how discussions had changed in that time. The results show just how dynamic and unpredictable fans' attitudes to sustainability are.



METHODOLOGY

Measuring what sustainability is, and therefore how fans talk about it, is difficult. This study required the power of both FuturePlus and Relative Insight's platforms to **pinpoint key insights from fans' conversations about sustainability.**

Relative Insight text analysis

Relative Insight is a comparative text analytics software that helps organisations generate actionable insights from text data.

Its platform combines AI-powered natural language processing with advanced comparative linguistics to analyse, quantify and visualise any source of text data. This helps brands and agencies across multiple sectors derive an enhanced contextual understanding of target audiences, competitors and trends.

The tool's comparative methodology quantifies which topics, words, phrases, grammar and emotions are more prominent in text data sets, helping you to understand what different groups are really saying.

FuturePlus sustainability indicators

The FuturePlus platform uses 200-250 sustainability indicators across five interlinked sustainability themes to quantify a company's current sustainability achievements, as well as its future ambitions. These themes are:



The indicators help business leaders to consider the practicality of sustainability in a balanced way, not solely focused on one aspect.

FuturePlus benchmarks and tracks different industries' sustainability journeys, harnessing intelligent ambition data insights to plot organisations' ESG objectives and the best way to achieve them.

A holistic view of sustainability is essential in identifying the symbiotic elements which all businesses need to consider – sports organisations included.

A greenhouse gas reduction programme, such as carbon offsetting for example, could create a hugely negative effect on biodiversity, environmental health, or social progress if poorly conceived. Similarly, it's impossible to understand climate change without delving into its major drivers, such as issues of inequality and exclusion.

Combining **both platforms**

To provide a starting point for analysis, FuturePlus and Relative Insight collected five years' worth of online conversations - primarily from Reddit and Twitter - to identify trends in how sports fans have been posting about sustainability. The study focused on four sports: motor racing, tennis, football, and cricket.

These discussions spanned millions of words and included both relevant and non-relevant conversations. To ensure the data was as clean as possible, FuturePlus used the key elements of its indicators to build semantic topics within the Relative Insight platform using its Custom Themes function. This identified discussions that reflect a combination of sport and the five themes which underpin the FuturePlus indicators.

With certainty over data quality, both organisations collaborated to develop comparisons to uncover key trends in sports sustainability conversations.

These comparisons examined the differences between each sport, in the use of language from fans across the US and UK, and each element of sustainability.

However, the comparisons that yielded **the most fascinating insights were those made over different time periods.** The report explores these insights in detail.



USING THE PAST TO INFORM THE PRESENT

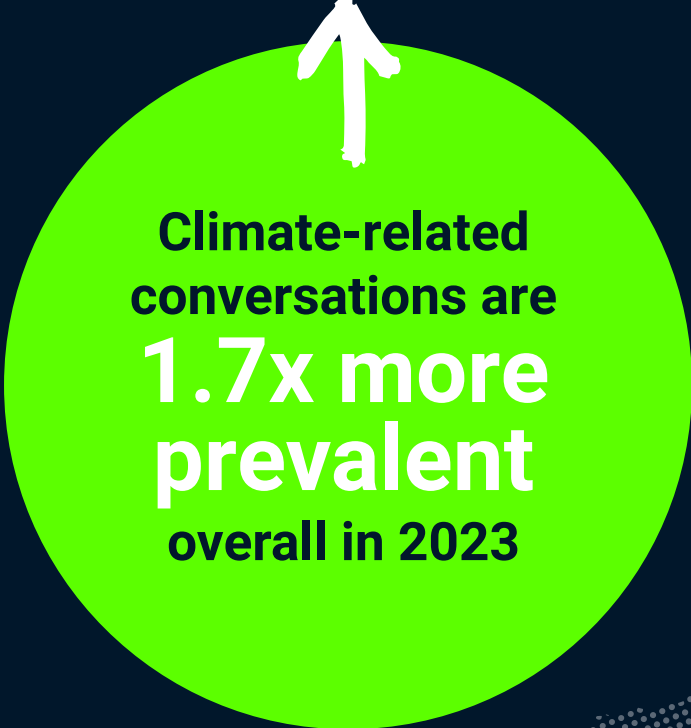
Due to a growing awareness around sustainability, it's unsurprising that comparing conversations year on year reveals vast differences in discourse.

Increased knowledge about environmental issues, the availability of information, athlete sustainability campaigns, and evolving generational values with younger people increasingly aware and vocal on the importance of sustainability are just some of the reasons for this.

For example, climate-related conversations are 1.7x more prevalent overall in 2023 when compared to 2018. Specific aspects of these discussions are even more likely to appear in these conversations, such as renewables (5.0x) and chemicals (11.5x).

However, mapping the data over time using Relative Insight's Heartbeat tool reveals a different picture. By using semantic topics, words and phrases to create themes within the Relative Insight platform that aligned to the FuturePlus indicators, we were able to visualise how frequently different elements of ESG appeared in online discussions.

Instead of a clear 'increase' in the prominence of sustainability in how fans are talking about sports, two clear trends emerge.



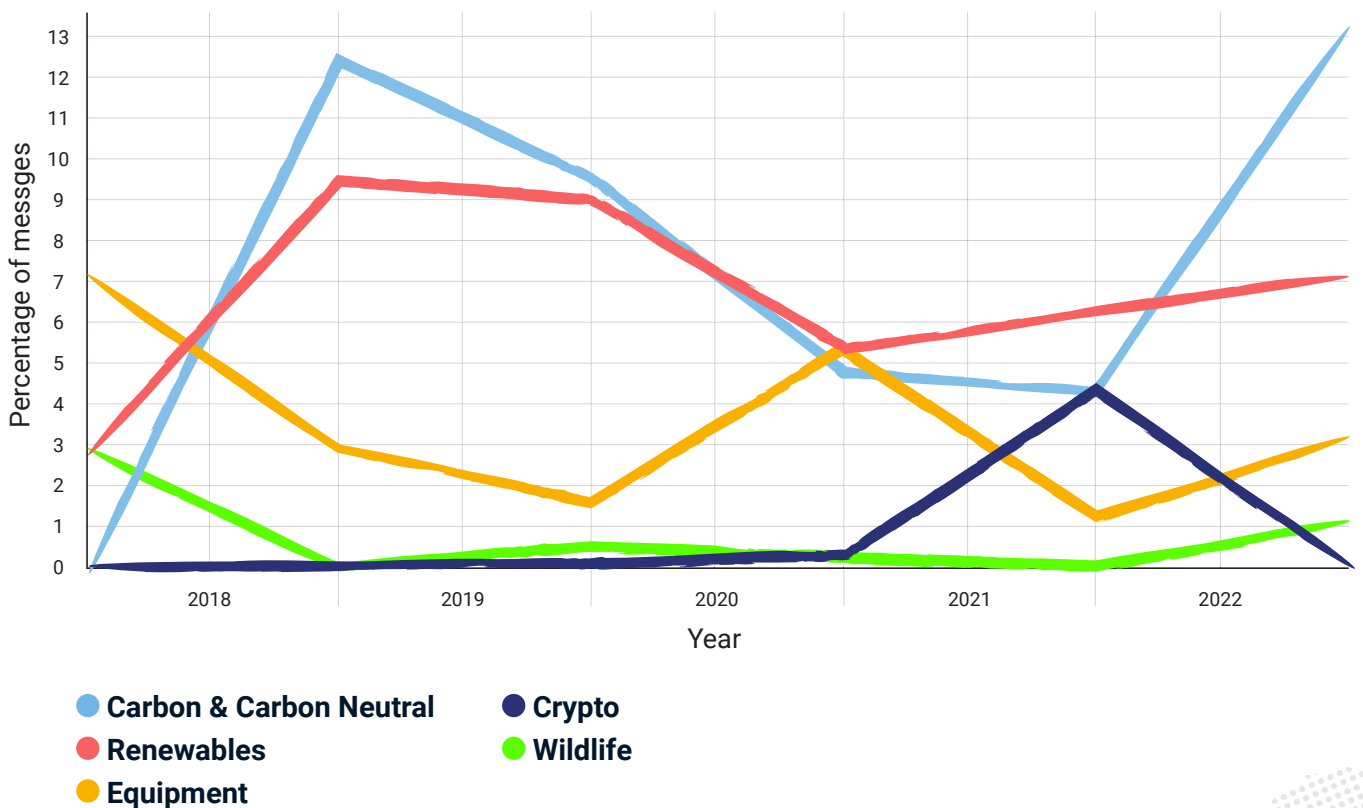
**Climate-related
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The first is the transient nature of sustainability themes within online sports discussions. Plotting five years' worth of data into a Heartbeat chart shows that no theme dominates for a period of time, with peaks and troughs across both Twitter and Reddit data.

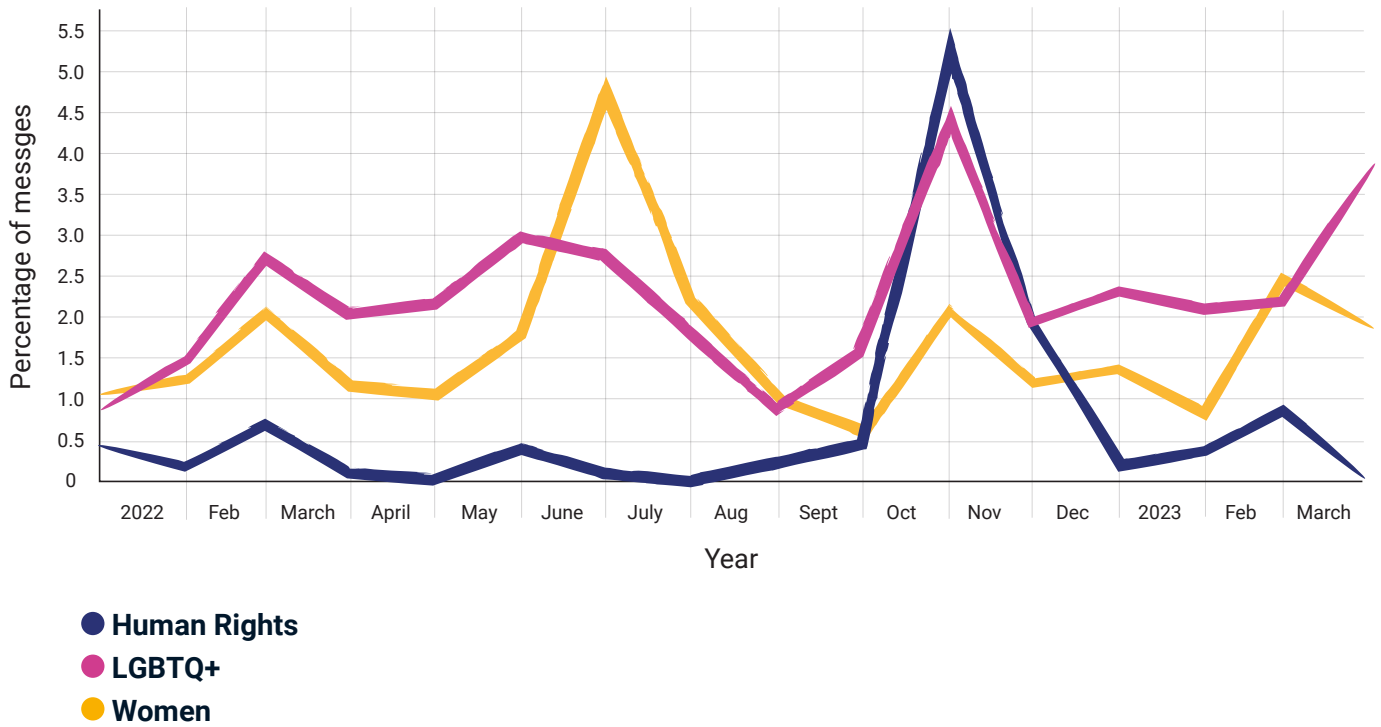
For example, Reddit discussions around sport and carbon emissions/carbon neutrality increase sharply between 2018 and 2019, fall considerably until 2022, and then rise sharply again.

If you simply compared 2018 and 2023 conversations, ignoring the intervening years, **this could appear to be a steady increase in awareness and discourse rather than something more varied.**

Sports Sustainability over time - Reddit data (Figure 1)



Sports Sustainability over time - Twitter data (Figure 2)



The second trend uncovered by our analysis is an increasing division between different groups of fans on the issue of sustainability. One segment demonstrates heightened awareness of climate change and social concerns. However, other fans believe that these topics have no place in the world of sports.

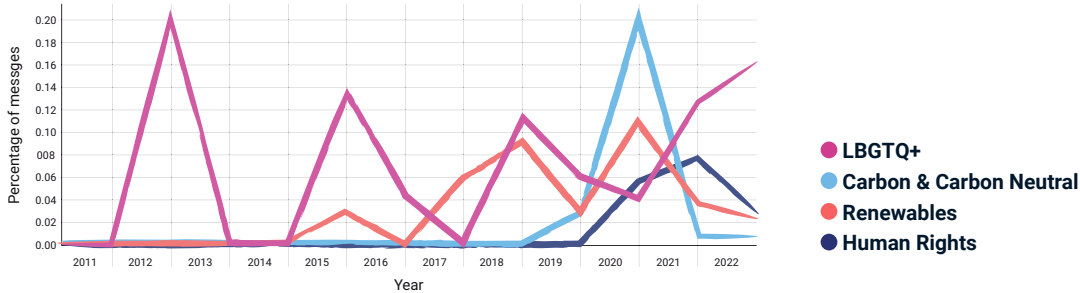
This split was strikingly clear when examining verbatim examples of differences that surfaced within the Relative Insight platform. Is a key factor behind sport being seen as a laggard on sustainability that there’s no consensus on the issue within teams’ primary audience – fans?

We’ll explore each of these changing dynamics and outline their implications for sports organisations.

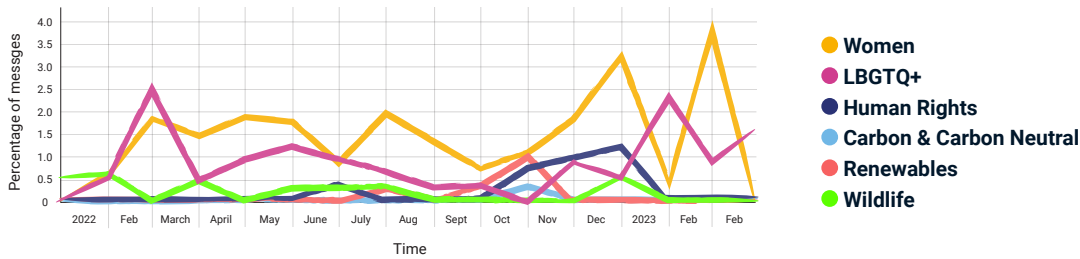


Heartbeat charts broken down by sports

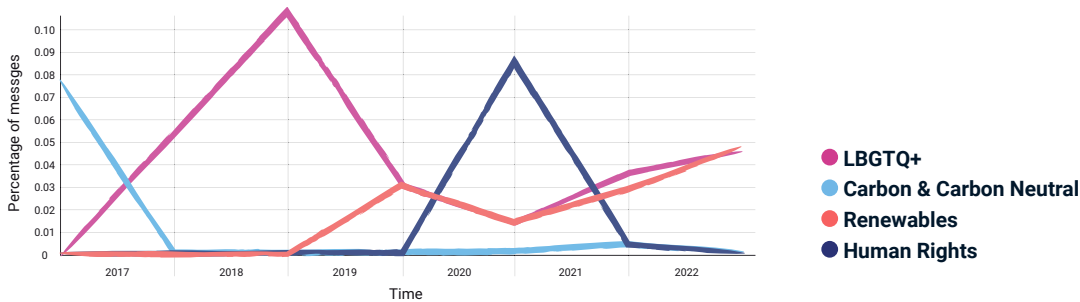
Football Reddit Data (Figure 3)



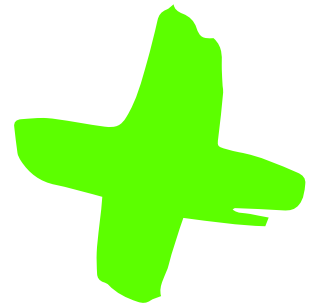
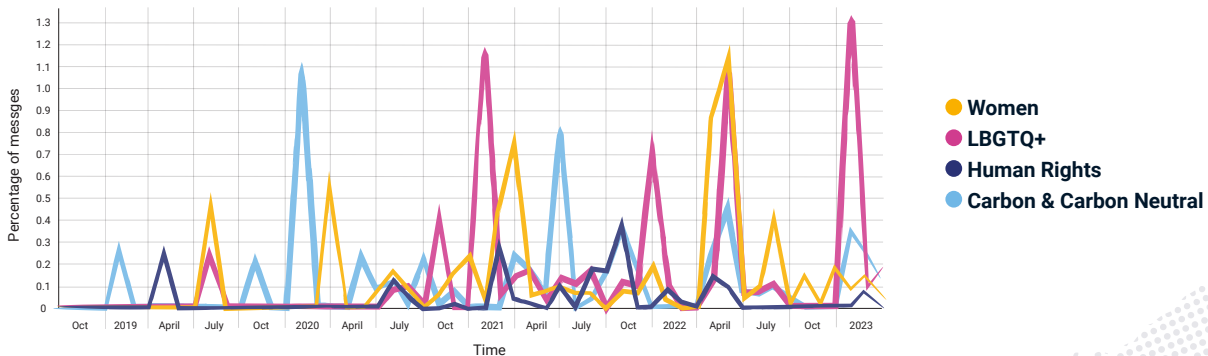
Cricket Reddit Data (Figure 4)



Tennis Reddit Data (Figure 5)



Motorsports Reddit Data (Figure 6)



UNPREDICTABILITY OF THEMES

The ways fans talk about sport and sustainability is intrinsically linked to political and societal events.

It's clear that online conversations in this area are driven by the news agenda, however, in certain scenarios, they also help to define the zeitgeist, determining how a story evolves.

This unpredictability in when themes surface is demonstrated by the 2022 Fifa World Cup in Qatar. Despite constant scenarios linking sport and human rights (regimes with controversial human rights records hosting smaller boxing tournaments, for example, or buying sports teams), the Qatar World Cup got people talking about human rights within sport.

Examples of these messages include:

“Why don't sports writers reporting on **#worldcup** consistently review concerns about human rights? They contextualize promotional statements; they sanitize selling soccer to states. Stop smiling/nodding at LIV golfers who speak in block quotes about the **“value of their product”**.”

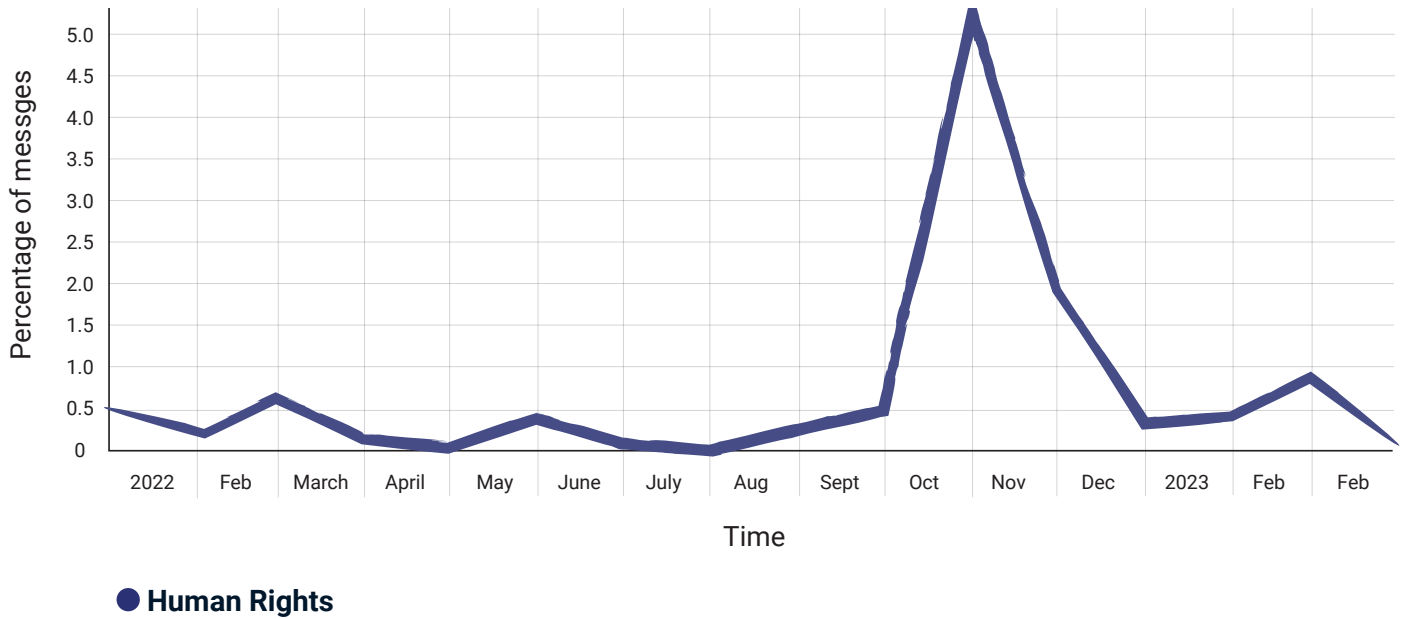
“The World Cup is being played in Qatar, a country where human rights are abysmal. Instead of whinging in interviews and social media, the professional football teams should just not play. Money talks. Playing there makes you as bad as them. **#nobackbone #fakethis**”

“...now they're going to spend The World Cup pontificating about human rights. **The only way to watch football anymore is with the volume muted.**”

However, despite this, interest didn't necessarily lead to sustained discussions about sport and human rights. Instead of conversations increasing, plateauing, or even falling slightly, the topic shot back down at the start of 2023 as new discussions took over.

*Quotes from Reddit and Twitter between 2018 and 2023.

Twitter all sports 2022-2023 (Figure7)



This is true of other elements of sustainability examined within the research.

In 2021, for example, conversations focused on sporting equipment. This topic overindexed 4.3x more overall when compared with other years, incorporating elements such as both footwear and balls, which were discussed infinitely more, as well as things like surfboards and wetsuits.

Online conversations also referenced manufacturing 2.9x more, highlighting that both materials and volume (and the waste which comes from it) were key topics of discussion.

“My mind goes to the question of shoes – we tennis players go through those much faster than other groups, with active players sometimes only getting a month out of a pair. **Think about the impact** that more durable shoes, or perhaps shoes that are more efficient in some way, could have.”



Diversity, equity and inclusion is an aspect of sustainability that many people and organisations overlook.

Discussions around this aspect of sport overindexed in 2023. The word 'gendered' appears infinitely more in online discussions this year than in 2022, while people are also 1.7x more likely to talk about 'trans' athletes.

“Alex Morgan sticking up for women in soccer and also trans kids is making me emotional.”

As the Heartbeat chart (figures 1 and 2) show, a variety of topics related to sport and sustainability go through peaks and troughs. However, it's noticeable that each theme does have its turn in the spotlight, following the cyclical nature of the news agenda.

This unpredictability highlights the need for sporting organisations to adopt a holistic approach to sustainability strategies.

Even though themes are unpredictable, they are **consistent**.

Themes do repeat themselves, meaning that they are always present, albeit at times latent, in public awareness.

By recognising the fluctuating relevance of different sustainability themes from year to year, sports organisations can future-proof their plans by addressing ESG issues from multiple angles. This approach ensures that their sustainability initiatives remain adaptable and responsive to evolving fan sentiments, fostering long-term engagement and demonstrating a genuine commitment to environmental and social responsibility within the sporting world.

Taking action to address their approach to human rights, diversity, equity and inclusion, sustainable use of equipment, climate change and becoming carbon neutral, their impact on wildlife, how they address growing crypto trends and resolving sustainability issues around ownership, must be key tenets of sports organisations' ESG strategies.



DIVIDED FAN BASE

The second big trend uncovered by analysing online conversations is a division in fan views when they speak about sustainability issues.

The rise of social media has seen sports stars given an unfiltered voice, with some weighing in on issues beyond sport. It's common for these individuals to be told to "stick to sport" by other people online.

This study uncovered a growing divide between fans who hold this opinion across all aspects of sustainability in sport, and those who want sports organisations to operate in a more sustainable way.

While the Relative Insight platform quantified text data by analysing the topics, words, phrases,

grammar and emotions around different themes customised to mirror FuturePlus's sustainability indicators, it also enabled us to granularly delve into the messages themselves. This highlighted the polarised nature of the conversations.

What this shows is that some fans have definitely undergone an education process when it comes to sustainability in sport. They speak with knowledge and raise uncomfortable questions for sporting organisations.

Example conversations include:

"The US soccer team invited migrant workers to watch practice and got some queer flair for its party? That's... that's how they're addressing the **real problems** of de facto slavery and human rights abuses at The World Cup? Get the f*** outta here."

"'Women's rights are human rights.' Except in Bahrain. And Saudi Arabia. And UAE for that matter. :("

"Is cricket sustainable amid climate change?"

"**RIP English cricket.** After all the racism scandals and totally pathetic ashes series, lock up the pavilions and sell the grounds for much needed housing projects."

"Good to see Premier League teams helping with climate change by **flying all around the world** just for pre-season friendlies. Obvs not enough teams in the football league at home to give them a test! #premierleague#efl#football#."

Pledgeball Case Study

Pledgeball, a unique charity initiative underpinned by academic research, recognises sporting fans' immense influence and passion and seeks to harness this power for meaningful climate impact.

Their model encourages fans to support their favourite teams by making lifestyle pledges. Pledges range from cycling to the stadium on match days to going vegan two days per week. Pledges are then tallied up, and the total amount of carbon dioxide equivalent saved by each group of fans is compared to that of the opposing team. At the end of the season, the cumulative amount of emissions saved by each club determines their standing in the Pledgeball league.

However, despite some fans showing a greater understanding of sports' impact, many still subscribe to the opinion that sustainability shouldn't have a place in sports. Many voice this opinion forcefully.

Indeed, when trying to undertake analysis into conversations about the environmental impact of sports teams flying, much of the data was distorted by the phrase "I don't give a flying f***", which overindexed greatly from fans with a 'stick to sport' mentality.

Other verbatim examples of this include:

“Yes there is the corruption of Fifa/ Qatar, a winter world cup, the human rights abuses etc, but I am still excited for the actual football matches -- it will get me through these dismal & depressing days of late November & December. Football is still football.”

“More virtue signalling bollocks from BT, Sky etc with the green football weekend crap. Another useless campaign that will do nothing just like racism and Black Lives Matter rubbish.”

“Green armbands in football now to raise awareness of climate change! Just play football & f***ck off with the kneeling, green armbands & any other lecturing!!!”

“It will be a sad day when Formula 1, Nascar, and IndyCar are sacked and dismantled by the climate change/race/Trans people. Sad indeed. Oh well.”

The 2021/2022 season saw 7,432,781kg of carbon dioxide equivalent pledged.

This is growing yearly, exhibiting the immense impact that can be achieved when we actively engage fans in sustainability efforts. Pledgeball succeeds in creating a sense of camaraderie and competition, which simultaneously plays into fans' love of their sport and ultimately influences ethical decision-making.

As the world increasingly recognises the importance of environmental conservation, initiatives like Pledgeball can play a crucial role in mobilising fans, transforming the sporting industry, and fostering a sustainable future.

“I'm increasingly enjoying reffing and watching women's football, so switched on the WSL preview show this morning on Sky. 20 mins in I'd been told about travelling green during train strikes, vegan diets, sustainability & car maintenance. Not one mention or highlight of the football.”

These polarising views create a tightrope for sports organisations to navigate. This necessitates that they carefully consider two crucial aspects within their ESG strategies.

Firstly, they must prioritise real, long-term impact, implementing tangible measures that genuinely contribute to environmental and social sustainability, rather than merely paying lip service to these concerns. Fans concerned about sustainability are knowledgeable enough to discern between cosmetic policies and actions that drive real change.

However, sporting organisations need to strike a balance that keeps fans engaged without compromising the essence of the sport. While some fans increasingly prioritise sustainability and social issues in their sports experience, others may resist any perceived dilution of the traditional sporting values. Finding this delicate equilibrium will be crucial if organisations are to simultaneously satisfy fans' desire for authenticity while fostering positive change and contributing to a more sustainable future.

EXTREME E

CASE STUDY

Given that policies around key sustainability areas identified in this report require a delicate balancing act to satisfy sustainability-conscious fans without alienating those who look to sport to escape the world's trevails, it's fair for sports bodies to argue that such a tightrope walk cannot be achieved.

However, there's at least one sport which has successfully combined entertainment and authenticity with a holistic ESG strategy. We explore how Extreme E has delivered this balance:

- ✦ By seamlessly blending exhilarating motorsport with a steadfast commitment to environmental and social sustainability, Extreme E stands as a remarkable case study for sporting organisations aspiring to implement impactful ESG strategies without compromising on the essence of their sport.
- ✦ The series centres around raising awareness about the climate crisis and its impact on fragile ecosystems, using racing as a platform for education and action. Extreme E races take place in remote and vulnerable locations, showcasing the devastating consequences of climate change firsthand. This unique approach sparks conversations and mobilises communities, creating a real impact beyond the confines of traditional sporting events.
- ✦ Extreme E's holistic attitude to impact, also encompasses a multifaceted approach to sustainability. By utilising hydrogen fuel cell systems, repurposing second life batteries, and encouraging fans to support races remotely, Extreme E showcases cutting-edge solutions that reduce environmental degradation and promote renewable energy sources. Such initiatives sit parallel to their Racing for All programmes which actively work to break down barriers and create opportunities for women, minority groups, and individuals from lower socio-economic backgrounds.
- ✦ Alongside this focus on sustainability, Extreme E also recognises the importance of not alienating its fan base by preserving the authenticity of motorsport. The series maintains the excitement and competitiveness of racing by featuring high-performance electric SUVs that can accelerate from 0 to 100 km/h in under 5 seconds. By employing cutting-edge strategies, Extreme E demonstrates that sustainable solutions can co-exist with thrilling motorsport, dispelling the notion that sustainability compromises the core value and enjoyment of the sport.

CONCLUSION

Analysing online conversations around sustainability in sport through the prism of the FuturePlus sustainability indicators reveals that sports organisations have a lot of work to do to satisfy the public. They need to balance the desires of two competing sections of fan bases.

They must address the demands of sustainability-conscious fans who expect them to tackle a range of issues in a meaningful way. To satisfy this growing caucus, organisations need to demonstrate that they are implementing ESG policies which have a real impact.

Not only will this re-engage sports fans who have become disenchanted with the industry's impact on wider society, it also allows organisations to take the lead when the news cycle focuses on particular sustainability issues – boosting reputation in the process.

However, sports leaders must do this in a way which is authentic to the sport to avoid negative backlash from those interested solely in sport itself rather than the way it operates and its impact on the wider world.

While this is a challenging balance to strike, sporting organisations have already offered examples of how it can be done successfully. The cyclical nature of focus areas when it comes to sustainability in sport means that organisations will face the same questions about how they operate over the coming years.

In the last three years alone, we have seen how conversations around racism in all areas of society peaked in 2020, sustainability of equipment trended in 2021 and how 2022 promoted discussion around human rights abuses due to the World Cup in Qatar.

It's impossible to predict which of these key themes will trend over the next three years, yet if companies are doing the above whilst working towards genuine, transparent, measurable, and actionable improvements, they should be future-proofed – and seen as sustainability leaders within the sector.



Ready to step up? Let's chat:

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