

EXECUTIVE SUMMARY

In a rapidly evolving sports and entertainment landscape, stakeholders within the biathlon family are facing both a challenge and an opportunity when it comes to engaging Generation Z – a digitally native, socially conscious, and highly selective audience. While biathlon has distinctive strengths, including its exciting format, gender equality, and unique combination of endurance and precision, there is more that needs to be done to attract younger fans.

Drawing on over 1,500 survey responses and insights from 100 Gen Z focus group participants across six markets, this whitepaper identifies three strategic imperatives for biathlon to increase its relevance among Gen Z:

NEW PATHWAYS TO BUILD FANDOM

BUILD A COMMUNITY TO DRIVE FANDOM

ELEVATE YOUR ATHLETES

1. NEW PATHWAYS TO BUILD FANDOM

Gen Z fans are no longer discovering sports primarily via traditional TV broadcasts. Instead, social media and gaming are emerging as key entry points. While the latter is unlikely to be a viable channel for the Biathlon Family in the short term, it should consider experimenting with influencer partnerships, lighter, behind-the-scenes content, and relatable storytelling that highlight the sport's unique challenges and entertainment value.

2. BUILD A COMMUNITY TO DRIVE FANDOM

Without peers to share their passion, young fans are unlikely to become core fans. It is essential to establish digital communities through the likes of Reddit, Discord, live streaming platforms, and strategic publisher partnerships. These forums can provide fans with native language environments that foster a sense of belonging and the regular touchpoints required to nurture fandom.

3. ELEVATE YOUR ATHLETES

Gen Z is increasingly drawn to individual athletes over teams or nations. Athletes' stories, emotions, and perspectives are increasingly what younger fans look for on social media. It will be vital to support athletes in this effort, with content planning, training, and production, especially during major events. Identifying and highlighting standout personalities can have transformative effects, as seen with other sports like Formula 1 and darts.

By implementing initiatives that address these imperatives, stakeholders within the biathlon family can position biathlon as an exciting, entertaining and unique sport that resonates with the next generation of fans. This will be essential to secure the future success of the sport and to generate new revenue streams.

“ ”

IF BIATHLON WERE MORE VISIBLE, I THINK A LOT OF PEOPLE
MORE WOULD FOLLOW IT BECAUSE IT IS VERY INTERESTING

ITALIAN GIRL, 17 Y/O

In 2024, fans worldwide consumed more than a trillion hours of sport content, making sports the third largest entertainment industry behind video games and TV. And while the industry as a whole is growing, not all sports are growing equally. Unsurprisingly, sports that are outpacing the market are ones that have put audience growth strategies in place to be relevant with all generations, especially the younger ones. And with 1 in 3 people worldwide now falling within Generation Z, capturing their attention is more important than ever.

We conducted research with Gen Z fans to understand how stakeholders in the biathlon family need to adapt their strategies to

attract more Gen Z fans, and thus secure the future of the sport both from an sporting and commercial perspective. We collected over **1500 survey responses** and spoke with **100 Gen Z fans** across **6 European markets** – ranking from large to small, mature to emerging – to understand what the strengths of biathlon are that we should capitalize on, and what the areas for development are to grow relevance with Gen Z fans in the future.

The findings and recommendations set out in this paper should be used as input to audience growth strategies at a local level to ensure they resonate with Gen Z fans.

STRENGTHS OF BIATHLON

While the research revealed a number of areas where stakeholders in the biathlon ecosystem can do more to capture the attention of younger generations, there are strong bases that biathlon can and should build on, to gain more attention in the future.

The most mentioned strength is the inherent excitement of the format of the sport. The survey results showed that excitement is the #1 ranked factor why fans follow biathlon (figure 1). This was echoed in the focus groups, where participants mentioned that the last shooting and lap are all-decisive, so one often cannot know who will win until the very end.

“**OFTEN THE RESULTS ARE COMPLETELY RE-SHUFFLED AT THE LAST SHOOTING OR IN THE LAST LAP, SO YOU CANNOT KNOW UNTIL THE END WHO WILL WIN**”

GERMAN GIRL, 15 Y/O



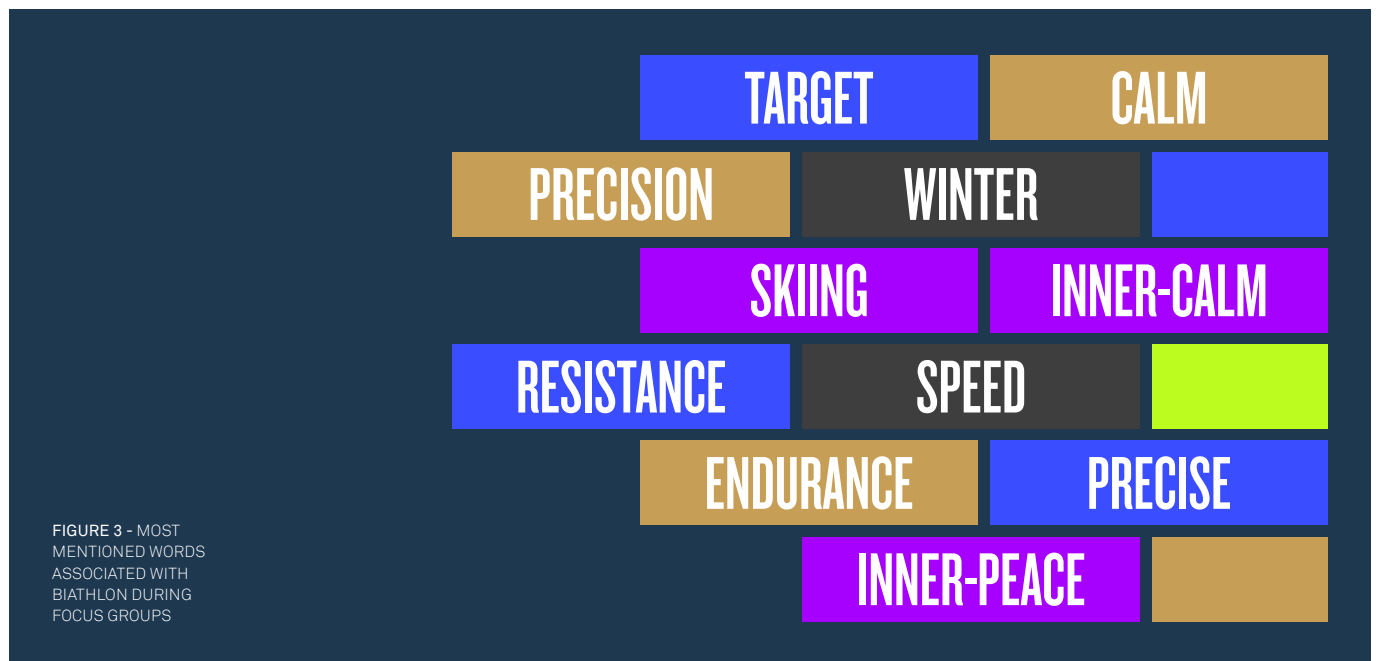
A second positively viewed characteristic of biathlon that resonates with Gen Z fans is the gender equality of the sport. Especially for younger female fans, having a sport that puts equal investment and importance on female athletes and competitions as men’s is a strong motivator to follow biathlon. In a world where women’s sport is on the rise, being able to draw on a long history of gender equality in the sport is an advantage. This is reflected in the way fans follow biathlon:

80% of fans reported following both men and women’s biathlon, with 35% of fans following both equally (figure 2). This puts biathlon on-par with Tennis in terms of following, and ahead of sports such as Volleyball, Handball and Football. A number of female focus group participants suggested that the gender-equality of the sport is a strong factor in them following biathlon over other sports, where male competitions are prioritised.



FIGURE 2 - SPLIT IN FOLLOWING BY GENDER IN FRANCE, GERMANY AND SWITZERLAND

Lastly, and perhaps the strongest point that biathlon can build on in the future, is the USP the sport provides. Biathlon has a unique positioning within sports in that it is one of the rare disciplines that combines two “sub-elements” that need to be completed in close succession and require a very different skillset. What makes it unique, is that these two elements are physically diametrically opposed. Every one of the 100 focus group participants mentioned this combination as being something that drew them into the sport, and should be central to the biathlon family’s efforts to bring biathlon to more Gen Z fans.



OPPORTUNITIES

While the important building blocks are here to make biathlon a fan-favourite amongst Gen Z in the future, there are some challenges that the biathlon family needs to address to make this a reality. The main challenge that biathlon faces today is that it is not well known by the younger masses. Whether a Gen Z fan knows about biathlon largely depends on their family's knowledge and following of the sport. In a world where digital channels play a key role in building knowledge and awareness, we must meet Gen Z where they are. Given biathlon's history of being a strong TV product, the challenge will be to continue growing an authentic digital presence to capture Gen Z fans, while maintaining a strong TV product to cater to older generations. We've broken

the awareness challenge down into three key opportunity areas that emerged during the research and should be central to future strategies:

**BUILD NEW PATHWAYS
TO FANDOM**

**BUILD A COMMUNITY
TO DRIVE FANDOM**

**ELEVATE YOUR
ATHLETES**

New pathways into the sport need to be built to increase attention with Gen Z fans, communities need to be established to connect fans and drive deeper fandom, and biathletes need to be elevated to serve as gateway into the sport.



NEW PATHWAYS TO BUILD FANDOM

In proprietary Two Circles research conducted across seven markets with over 32,000 responses, fans from different generations were asked which factors led them to become fans of a sport. Of the eight possible factors, three showed a significant difference between Gen Z and Baby Boomers.

Linear TV/streaming has had the biggest decrease, while social media and gaming have relatively increased the most across generations. This means that fewer young fans are being drawn into a sport through watching live coverage on TV or streaming, and increasingly by engaging with a sport on

social media or via gaming.

This trend is true across sports in general, but is it also true for biathlon? In short, yes. However, the changes are not as pronounced as in other sports. The importance of linear TV / streaming has only decreased by 20% (vs. 51% in sports in general), and social media has only increased in importance by 50% (vs. 121% in sports in general). The change in the importance of gaming could not be researched, as the gaming offering within the biathlon ecosystem is relatively new, and that channel has not had a significant impact on generating fans for biathlon.

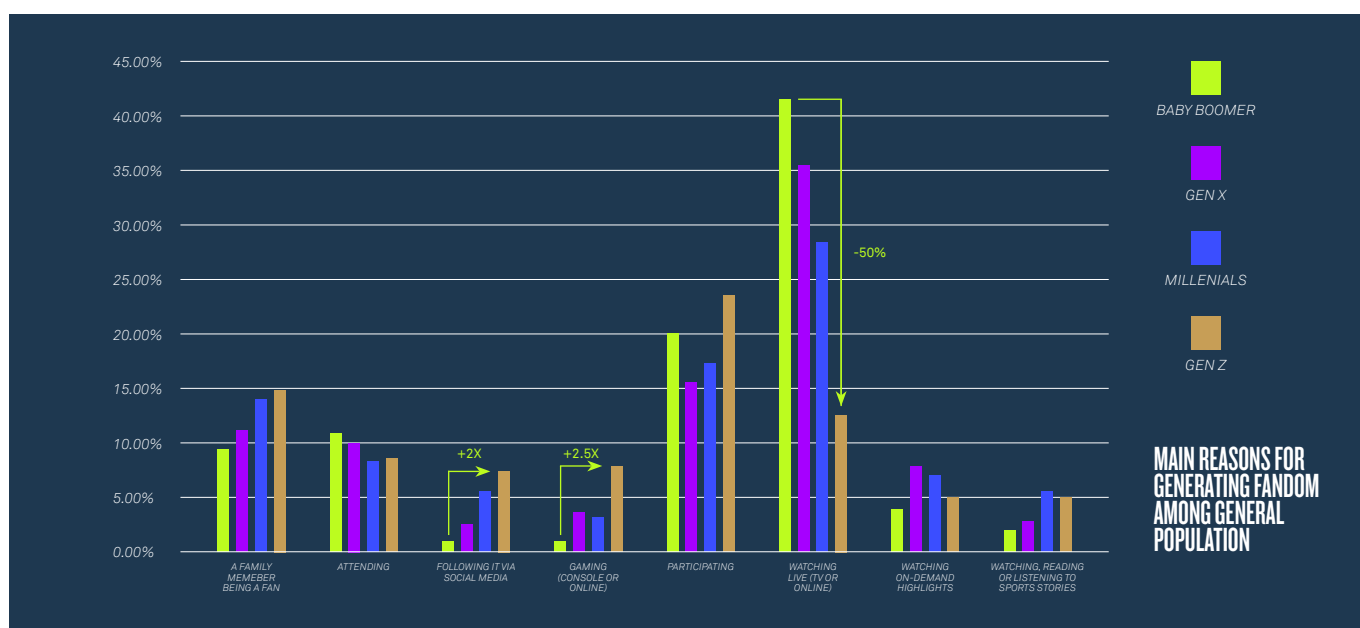


FIGURE 4 - MAIN REASONS FOR GENERATING FANDOM

Comparing these values, and while biathlon has excellent linear media distribution in core winter sport markets, we can nevertheless say that biathlon is still relying heavily on linear TV / streaming, and under performing in terms of using social as a medium to generate new fans. In order to capture the attention of younger fans, we therefore need to do more to meet them where they are, in particular on social platforms.