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MARKET ANALYSIS OF SPORTS APPS

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ABSTRACT

Background: In order to identify the market for sports applications within the domestic market and to examine past and future trends, the present study aimed to investigate the status of the sports application market.

Methods: The research methodology included descriptive statistics and qualitative content analysis. To categorize the applications, the Myket and Café Bazaar markets were searched using sports-related keywords. A total of 2720 sports-related applications were identified, with 1640 domestic applications and 1080 foreign applications. The entire population of the study was considered as the sample and examined accordingly. In the second phase, the applications were statistically analyzed based on available indices, including size, average rating, place of origin, and number of installs, and their status and position were displayed using descriptive statistics.

Results: The analysis revealed that while domestic applications dominated in quantity, foreign applications had significantly higher installation rates, especially in gaming and educational categories. Sports game applications, particularly football apps, held the largest share of the market. Domestic applications received higher ratings due to active engagement with users and responsiveness to feedback. The market analysis also highlighted trends indicating that domestic developers, with access to local payment gateways and a better understanding of user preferences, are well-positioned to continue expanding their presence in the sports application market.

Conclusions: The findings of this research provide valuable insights for developers aiming to enter or expand within the sports application market, offering guidance on addressing user needs and market dynamics effectively.

KEYWORDS
Application, Digital Market, Sport Platform, Modern Business, Innovation

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Introduction

The expansion of the internet has created a unique opportunity for companies to manage their businesses electronically in order to stay competitive in a global environment [4]. Globalization of the economy has impacted all industries. The duration for which a company can rely on past innovations to maintain market leadership is decreasing day by day. This makes investment in innovation essential even for the most stable organizations [9]. Electronic business is one of the significant outcomes of the information and communication technology revolution, which, with its various features and capabilities, has facilitated the emergence of innovation and entrepreneurship. Market expansion, reduction in communication costs, and improved customer relations are among the benefits that electronic business provides to organizations and economic enterprises [18]. Electronic business involves the sharing of commercial information and business communications. Conducting electronic business transactions means employing new technologies to establish connections among manufacturers, sellers, and suppliers of goods and services, and on the other hand, buyers and consumers (customers). The outcome of electronic business includes the optimization of goods and services, cost reduction, opening new channels, and making more effective decisions [17]. Electronic business has a broader and deeper definition than electronic commerce. It not only encompasses the buying and selling of products and services but also includes customer service, business partner collaboration, e-learning, and intra-organizational electronic exchanges. IBM first defined the term electronic business as a secure, flexible, and integrated approach to delivering value in various businesses by creating a combination of systems and processes focused on core business activities, while maintaining simplicity and leveraging internet technology [40, 39].

According to Pon & swoaman, there are generally five advantages in electronic business that drive its adoption: wider market exposure, direct and indirect marketing, low communication costs, gaining a larger market share, and ultimately improving the company's image [10]. Therefore, moving towards the implementation of electronic business not only brings numerous benefits for companies but also allows them to achieve better opportunities for gaining productivity and effectiveness as a competitive advantage [19]. Previous research indicates that the application of internet-related technology throughout the entire value chain of an organization, such as human resource management, procurement, sourcing, marketing and sales, and customer service, provides advantages in cost reduction and efficiency improvement [36]. In this regard, Hosseini et al. (2016) found in their study that electronic commerce has a positive and significant relationship with the development of sales, cost reduction, awareness enhancement, and service acceleration [16].

A mobile application, commonly referred to as an app, is a type of software application designed to run on mobile devices. This includes all the software we use daily, except for system software like operating systems and programming languages. For instance, one app might be for video playback, while another manages downloads; thus, they are very different from integrated computer systems. Similar to websites, mobile applications are websites adapted to mobile device formats. Mobile applications are used on mobile devices such as smartphones and tablets. They allow users to easily use them by tapping on the app icons on their mobile devices after downloading and installing them [27, p. 11]. Sports applications have become one of the fastest-growing segments in the sports industry. The remarkable growth of the software industry not only provides a significant marketing opportunity to reach and serve consumers but also offers a way to generate new revenue streams [33, p. 125].

Shakourian et al. (2023) examined the social impact of sports applications on burnout in life using a dual enthusiasm approach and concluded that planning to improve users' mood and psychological states, such as alleviating life burnout, seems necessary[22]. Gheisvandi (2022) found that

perceived ease of use, perceived usefulness, enjoyment, and trust directly influence the decision to use sports team applications [24]. Salehi concluded that 65.7% of the variance in the intention to use sports apps was explained by perceptual, technological, individual, sports-related, and social variables, with the technological and perceptual factors showing the highest impact and the social factor showing the least impact in the model [35].

In Iran, the mobile application market has experienced significant growth in recent years. The expansion of internet access and the widespread adoption of smartphones have further boosted this market. According to an official report by Café Bazaar, in 2017, the platform had 36 million users, and over 151,000 programs and games were uploaded that year [29]. According to a 2017 report by the Iranian Computer Games Foundation, 28 million individuals in Iran engaged in video gaming. Of this number, 88% played on mobile platforms through applications. Within this segment, driving games ranked third, while sports games occupied the fourth position in terms of public interest. The estimated revenue generated by mobile gaming in this year reached 229 billion Tomans [30]. In e-business models, transformations occur in the way work is conducted, relationships with suppliers and customers, product delivery methods, and marketing approaches. Consequently, the first step for companies transitioning towards e-business should be identifying the appropriate e-business model [15, 3]. Understanding the components that constitute an e-business model is crucial for its identification and definition within an organization [37, 7, 26].

Given the significant role of sports and physical activity in various aspects of individuals' lives, encompassing entertainment, health, and social integration, e-business within this domain exhibits significant potential. Entering the e-business environment in the realm of sports necessitates a profound understanding of the market. This study, therefore, aims to analyze the market for sports applications within the domestic landscape, examining past and future trends. The research focuses on market identification through the categorization of products, existing competitors, and customer preferences.

Material and Methods

This research employs a mixed-methods approach, combining descriptive statistics and qualitative content analysis. The initial phase focuses on categorizing sports and health-related applications. A comprehensive search was conducted using keywords such as "sports," "health," "exercise," "gym," "physical activity," "fitness," "stretching," "sports nutrition," "sports media," "sports game," and "competition" to identify all available applications. Subsequently, the identified applications were grouped based on thematic similarity and categorized into relevant clusters.

The second phase involved a quantitative analysis of the identified applications based on readily available metrics, including size, average rating, origin of development, and installation count. These metrics were extracted from the applications' descriptions and platforms. Descriptive statistics were then employed to illustrate the overall status and positioning of these applications.

The final stage of the research involved a qualitative content analysis of user comments to identify factors contributing to user satisfaction and dissatisfaction with sports-related applications. Twenty recent comments from users were collected for the top 10 applications (ranked by installation count) within each category identified in the previous phases. Qualitative content analysis, as a research methodology, involves a systematic process of categorization, coding, and theme identification to interpret the meaning within textual data. A core characteristic of qualitative research is theory generation rather than theory testing. Qualitative content analysis provides an empirical, phenomenological, and controlled, step-by-step approach, taking into account the elements under investigation [13]. This study employed a three-stage coding approach for

qualitative content analysis of user comments from the app download sections to extract insightful results.

POPULATION AND SAMPLE

An investigation of the two major app markets in Iran resulted in the identification of 2720 sports-related applications. These applications were categorized into two sections: domestic and international. The domestic section comprised 1640 applications, while the international section included 1080 applications. The entire research population was considered as the statistical sample and subjected to analysis.

STATISTICAL ANALYSIS METHOD

In the descriptive section, which addresses the research questions (what are the categories of sport apps? and what is the statistical description of the state of them in terms of volume, average installation rate, price and origin), sports-related applications were examined using descriptive statistics. Subsequently, comments from the top-ranked applications in each category were analyzed using content analysis. The results of this analysis are presented below.

In this section, after extracting 20 comments from the top 10 sports applications in the investigated markets, a qualitative content analysis was conducted using a systematic coding process in three stages.

Four criteria have been presented for evaluating the results obtained in qualitative content analysis, which include credibility, transferability, dependability and conformability [19]. In order to increase credibility, the interpretations of raw data and the use of verifiable data in the reviewed websites were investigated. In order to increase the transferability of the data analysis, 10 applications were selected based on the statistics of the websites and their last 20 comments were analyzed. In order to increase the dependability, a single method was followed from the beginning to the end of coding, accurate recording of the stages and method of combining and summarizing and finally, to increase the conformability, the use of valid, accessible and unchangeable data form websites was used.

Results

Number of Sports Applications

An investigation of the two major app markets in Iran resulted in the identification of 2720 sports-related applications. These applications were categorized into two sections: domestic and international.

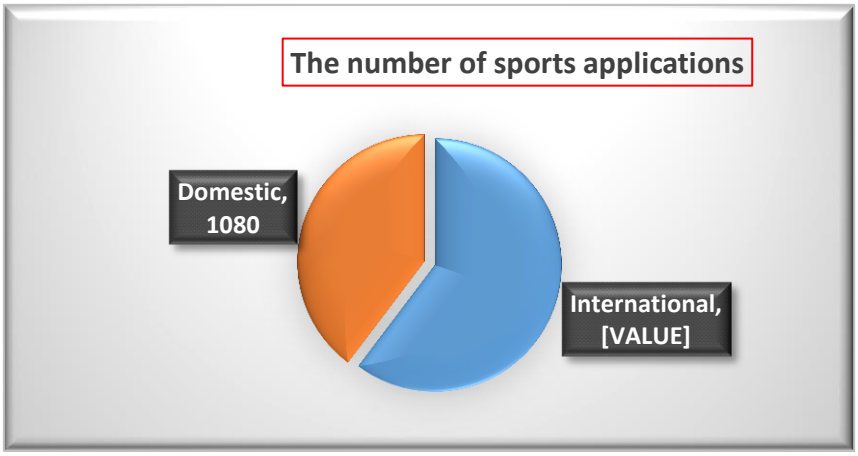


Figure 1: Number of Domestic and International Applications

This section reveals that the number of domestic applications (1640) outnumbers international applications (1080). This indicates a relative and favorable growth in the development of apps by Iranian developers.

Sports Application Activity Domains

Based on the frequency of applications analyzed across the two app markets, sports applications were categorized into four main domains. The number of applications in each domain is presented in the following charts .

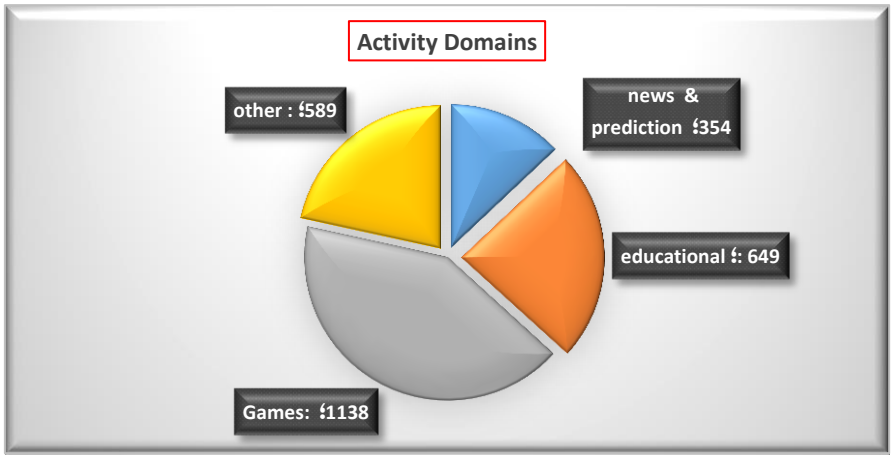


Figure 2: Activity Domains of Analyzed Applications

As observed in Figure 2, the majority of applications fall within the gaming domain, followed by sports education. The news and sports prediction domain ranks third. It is worth noting that the "other" category does not include any specific domain that garnered particular developer interest and warranted separate classification .

Such analysis indicates that domestic developers exhibit a greater preference for the gaming, educational, and "other" domains, with news and prediction ranking last in terms of developer interest.

Below are some subcategories for the "Other" category:

1. Music, Pics ,Academic points and hints about Fitness and Yoga Apps
    - This category includes apps that provides hints in fitness exercises, yoga programs, meditation, and health-related content. Due to the increasing popularity of home workouts, especially after the COVID-19 pandemic, these apps have seen significant growth.
2. Points and hints about Diet and Nutrition
    - These apps help users plan suitable diets and manage their calorie and nutrient intake. While often overlapping with fitness apps, they are considered a separate subgroup due to their specific focus on nutrition and dietary management.
3. Niche and Emerging Sports Apps
    - This subgroup consists of apps related to specific or lesser-known sports, such as parkour, badminton, or martial arts. Although these sports have smaller audiences

compared to mainstream sports like football, these apps cater to enthusiasts within these niche areas.

4. Activity Tracking and Monitoring Apps
    - These apps help users track their daily physical activities, such as steps taken, distance covered, calories burned, and heart rate. The use of these apps has grown due to their integration with wearable devices like smartwatches.
5. The remaining belong to other apps that fall into smaller or less significant categories, such as children's sports apps or social, sport markets and collaborative fitness apps that encourage users to participate in group exercises.

Table 1: Activity Domains of Domestic and Foreign Applications

Sport type	Foreign Apps		Domestic Apps	
	Percentage	Frequency	Percentage	Frequency
Games	44.44	480	40.12	658
Educational	12.78	138	31.16	511
News& Prediction	12.31	133	13.48	221
others	30.46	329	15.24	250
Total	100	1080	100	1640

From the perspective of foreign developers, after gaming, the "other" miscellaneous domains, followed by education and news, have proven to be attractive to their target audience .

INSTALLATION NUMBERS

The figure below presents average application installation numbers, revealing a preference among Iranian customers for foreign applications.

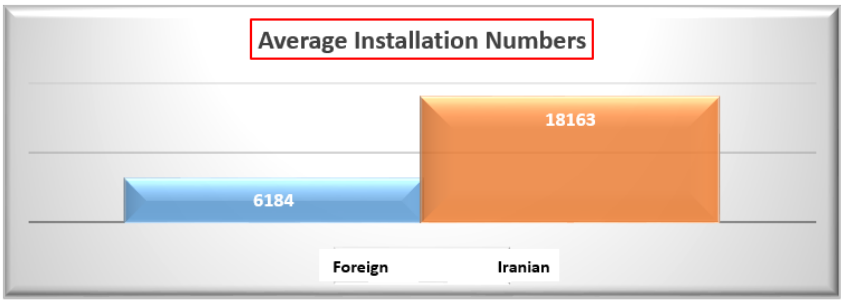


Figure 3: Average Installation Numbers by Activity Domain

Pricing

In terms of pricing, applications are categorized into three groups: free, paid, and in-app purchase. The number of applications in each group is presented in the following charts.

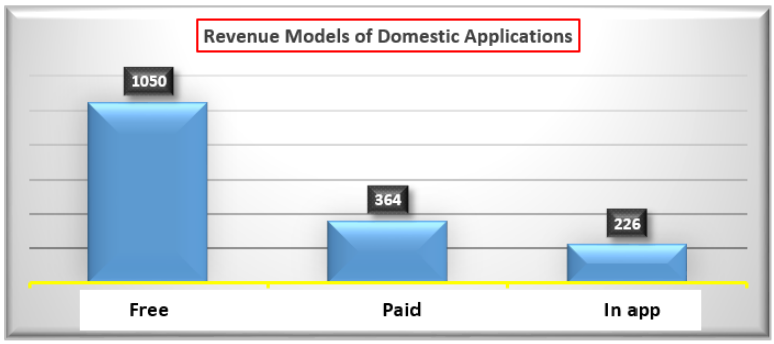


Figure 4: Revenue Models of Domestic Applications

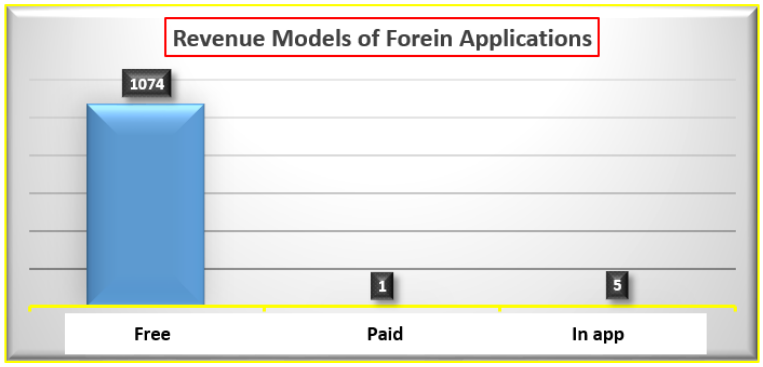


Figure 5: Revenue Models of Foreign Applications

Due to challenges with international payment processing in Iran, foreign applications lack in-app purchases. However, both in-app purchases and paid applications are observed among domestic applications.

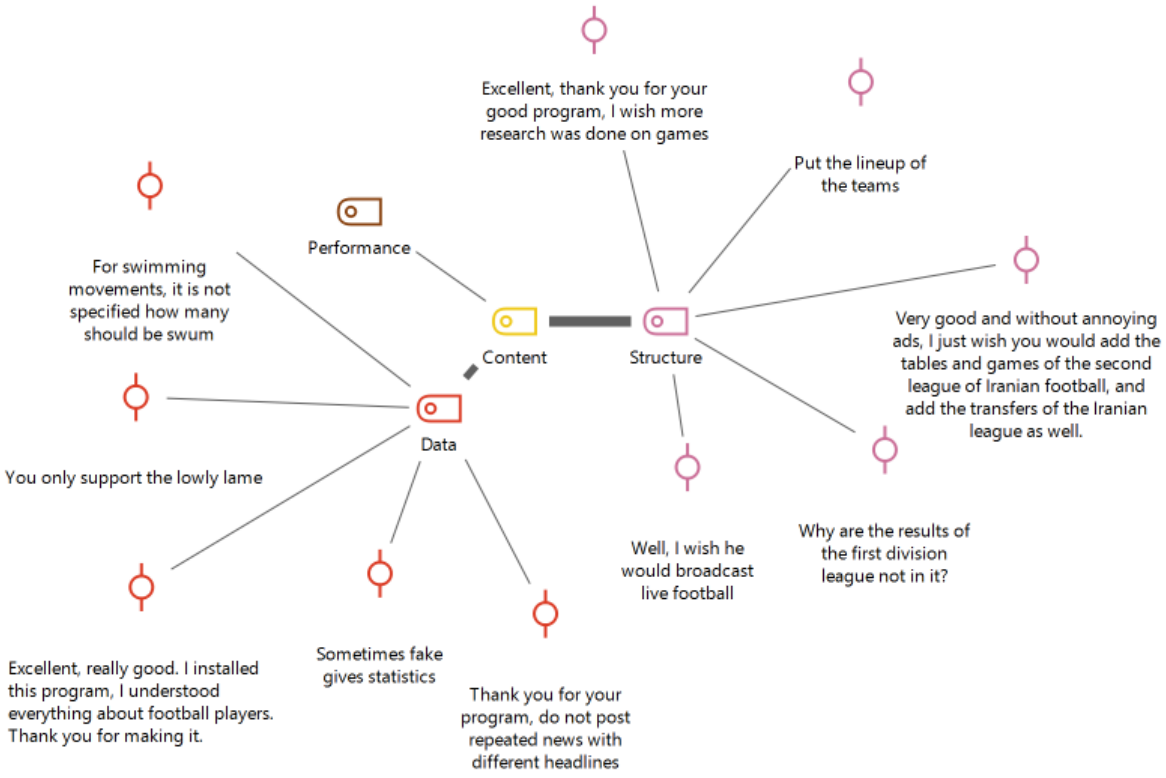
SPORTS TYPE

Based on the frequency of applications across sports domains, they can be classified into five main categories:

Table 2. Types of sports in Domestic and Foreign applications

Sport types	**Domestic Apps**		**Foreign Apps**	
	Frequency	Percentage	Frequency	Percentage
football	708	43.17	323	41.95
volleyball	32	1.95	12	1.56
fitness	179	10.91	51	6.62
Public	89	5.43	24	3.12
Other sports	632	38.54	360	46.75

In this section, the results of the analysis of comments using qualitative analysis are displayed.



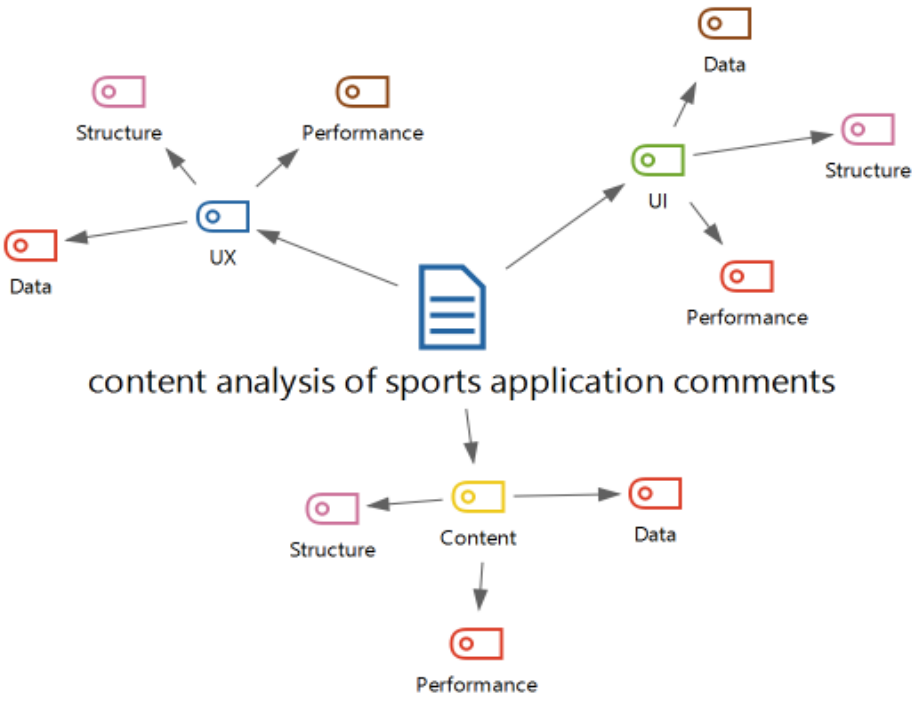


Figure 6. Application comments coding example

Figure 7. Content analysis of sport applications comments

Discussion

The descriptive analysis of the applications reveals a predominance of domestically developed apps, a finding consistent with similar research conducted in emerging markets like India and Brazil. In these regions, locally produced apps also dominate due to their inherent understanding of user preferences and the cultural nuances that foreign apps often overlook. Studies from countries with comparable tech ecosystems have shown that local developers are better equipped to address region-specific challenges such as payment processing systems and government regulations. For instance, research in India by Gupta et al. (2021) highlighted the success of Indian apps due to their seamless integration with local digital payment gateways [11], similar to the situation in Iran.

The strong presence of locally produced applications in Iran can also be linked to the growth in technical expertise and the surge of app development companies. The expansion of e-commerce in Iran, facilitated by economic sanctions limiting access to global apps, provides fertile ground for domestic developers. The literature on localized innovation, such as studies by Qureshi et al. (2020), emphasizes how constraints like economic sanctions can fuel domestic ingenuity, driving growth in homegrown applications tailored to local needs [18]. These findings resonate with our study, particularly in the dominance of locally developed sports apps.

The limitations faced by foreign applications—including the lack of localization and interaction barriers—mirror trends observed in other markets with distinct linguistic and cultural needs. In research comparing the app ecosystems in China and the Middle East, Fan et al. (2022) noted similar constraints faced by foreign developers who struggled to localize their offerings [24]. Our findings align with this, particularly in areas like bilingual support and user feedback channels. The lack of localized content and limited interaction between foreign developers and Persian-speaking users emerged as significant issues, contributing to the higher user ratings for domestic applications.

The monetization strategies also reveal important insights. While both domestic and foreign apps use in-app advertising, foreign apps face additional challenges due to financial transaction limitations in Iran. Similar patterns were observed by Bianchi et al. (2021) in their study of the Brazilian app market, where global apps struggled with local financial infrastructure, limiting their ability to monetize effectively [22]. In contrast, domestic apps, leveraging local payment gateways, could diversify their revenue models, enhancing their profitability.

Interestingly, despite the greater number of domestic applications, foreign apps have higher average installation rates. This echoes findings in studies from Russia and Turkey, where foreign apps demonstrated superior functionality, leading to higher adoption rates despite localization challenges. However, the higher ratings for domestic apps, as noted in our study, suggest that local developers have successfully created a responsive feedback loop, actively engaging with users to improve the user experience—a finding supported by Lee et al. (2019) in their analysis of the South Korean app market [8].

The popularity of football-related apps in Iran reflects broader global trends in sports app usage, as highlighted by Pérez et al. (2023), where football consistently ranks as one of the most downloaded app categories [30]. In our study, this is particularly true for domestic apps, which cater to the intense local interest in football and capitalize on real-time engagement, such as live scores and match updates. This user preference for locally relevant content over more generalized offerings by foreign apps emphasizes the importance of cultural alignment in app development.

Moreover, the content analysis identified significant issues regarding incomplete and complex content, particularly in the health and fitness sector. This aligns with studies by Thompson et al. (2020), who found that fitness apps often fail to provide clear guidance for different user

demographics, leading to user frustration [15]. In our study, the lack of clarity in app instructions and user segmentation negatively affected user satisfaction, reinforcing the need for targeted content based on user needs.

Lastly, updates and seasonal content emerged as a critical factor for user retention. During significant events like Ramadan or public holidays, users expect tailored content that aligns with their routines, a trend similarly noted by Yilmaz et al. (2021) in their study of Turkish mobile apps [21]. Failure to provide timely updates during these events can lead to disengagement, as users feel the app is no longer relevant to their needs.

Conclusion

In conclusion, the dominance of domestic applications in Iran is primarily due to their cultural relevance, localized support, and adaptability to user feedback. However, foreign applications, despite their higher installation rates, face substantial challenges in localization and monetization due to economic and regulatory constraints. Future app development in Iran should focus on improving the user interface, user experience, and content clarity to increase user satisfaction and retention. Moreover, leveraging local insights, enhancing bilingual capabilities, and maintaining responsiveness to seasonal and cultural needs will be critical in sustaining the growth of domestic apps while addressing the gaps faced by foreign developers.

Ethical Considerations:

Compliance with ethical guidelines

This study involved a descriptive analysis of sports applications and did not include human participants or interventions. Therefore, no direct ethical concerns were applicable. However, all data were collected and analyzed following ethical research principles, ensuring accuracy, objectivity, and proper citation of sources.

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Conflict of Interest

The authors declare that there are no conflicts of interest regarding the publication of this manuscript

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«مقاله پژوهشی»

تحلیل بازار اپلیکیشن های ورزشی

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چکیده

هدف: به منظور شناسایی بازار اپلیکیشن‌های ورزشی در بازار داخلی و بررسی روندهای گذشته و آینده، این مطالعه به بررسی وضعیت بازار اپلیکیشن‌های ورزشی پرداخته است.

روش شناسی: روش تحقیق شامل آمار توصیفی و تحلیل محتوای کیفی بود. برای دسته‌بندی اپلیکیشن‌ها، بازارهای مایکت و کافه‌بازار با استفاده از کلمات کلیدی مرتبط با ورزش جستجو شدند. در مجموع ۲۷۲۰ اپلیکیشن ورزشی شناسایی شد که ۱۶۴۰ اپلیکیشن داخلی و ۱۰۸۰ اپلیکیشن خارجی را شامل می‌شد. کل جامعه آماری به عنوان نمونه در نظر گرفته شده و مورد بررسی قرار گرفت. در مرحله دوم، اپلیکیشن‌ها بر اساس شاخص‌های در دسترس از جمله حجم، میانگین امتیاز، محل انتشار، و تعداد نصب مورد تجزیه و تحلیل آماری قرار گرفتند و وضعیت آن‌ها با استفاده از آمار توصیفی نمایش داده شد.

نتایج: تحلیل داده‌ها نشان داد که اپلیکیشن‌های داخلی از نظر تعداد غالب هستند، اما اپلیکیشن‌های خارجی نرخ نصب بالاتری دارند، به ویژه در دسته‌های بازی‌های ورزشی و اپلیکیشن‌های آموزشی .اپلیکیشن‌های بازی‌های ورزشی، به ویژه برنامه های مرتبط با فوتبال، بیشترین سهم بازار را به خود اختصاص داده‌اند . اپلیکیشن‌های داخلی به دلیل تعامل فعال با کاربران و پاسخگویی به بازخوردهای آن‌ها، امتیازات بالاتری دریافت کرده‌اند .همچنین، تحلیل بازار نشان داد که توسعه‌دهندگان داخلی، با دسترسی به درگاه‌های پرداخت محلی و درک بهتر از نیازهای کاربران، در موقعیت مناسبی برای گسترش حضور خود در بازار اپلیکیشن‌های ورزشی قرار دارند.

نتیجه‌گیری: یافته‌های این پژوهش بینش‌های ارزشمندی برای توسعه‌دهندگانی که قصد ورود یا گسترش در بازار اپلیکیشن‌های ورزشی را دارند، ارائه می‌دهد و راهنمایی‌هایی درباره پاسخگویی به نیازهای کاربران و پویایی‌های بازار ارائه می‌کند.

واژه‌های کلیدی

اپلیکیشن، بازار دیجیتال، پلتفرم ورزشی، کسب‌وکار مدرن، نوآوری

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