

# The Changing Face of Fan Passions

How brands and rights holders can  
play in the new era of engagement

Ogilvy One

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On



PART I

# Sport is now culture



# SPORTS IS NOW ON THE CENTER STAGE OF CULTURE

Once the domain of a traditional fan base whose passion was the defining feature of a sporting occasion, sports leagues, teams and athletes now find themselves with outsized influence. In an era of accelerated growth, the sports industry, the world's games, and those who play them transcend stadiums and events, with a wider world of fans driving new waves of culture, conversation, and increasingly, economies.

Global spend on sports media rights broke the \$60bn barrier in 2024<sup>01</sup>, with broadcasters and streamers competing to capture a share of premium rights as sporting events represent one of the last – and by far most reliable – ‘appointments to view’ among linear content and live audiences. These are rare, shared moments in a world of media fragmentation, where consumers now opt for on-demand and individual convenience.



As Google's Sundar Pichai noted during the last World Cup, "it was like the entire world was searching about one thing!"<sup>02</sup>

The increased investment in sports media alongside the soaring valuations of teams and leagues has placed a premium on sports rights. The value of sports sponsorships, estimated at \$105.47bn in 2024, is expected to grow with an annual rate of 8.73%, reaching \$189.54bn by 2030<sup>03</sup>.

With its unique mix of adrenaline-fueled competition, shared community, personal stories, and cultural spectacle, sports culture lies at the heart of this drive. The explosion of unofficial media spaces and the digital democratization of creator content have transformed sports culture, attracting younger, more diverse

audiences than ever before and fostering entirely new communities united by shared passions.

In the last decade, the audience for F1 has completely transformed, with 41% of F1 fans now female and those aged 16-24 the fastest growing group<sup>04</sup>, while soccer seems poised to attract a new wave of fans ahead of the 2026 World Cup in USA, Canada, and Mexico. Sports rights holders and smart brands are reaching new audiences as the next generation of fans emerges.

But as attention across the media landscape continues to scatter, how have sports become a collective experience that transcends demographics?

Both the short – and more complex, longer answer – is the rise of fandom.

More than just an audience, fans are supporters, stakeholders, culture-makers, volunteer spin doctors, and a media and creative culture force – one that, when engaged, can make stories fly. Already a mainstage for brand presence and sales, sports are experiencing a new level of cultural impact thanks to the agency and ownership fans feel over the sports, leagues and teams they love – and how they capture and share their passion.

Modern fandom offers multiple opportunities to activate the unique power of fans. Traditional media buys and sponsorship deals still play a part. But emerging behaviors like participatory fan media, younger fans opting for highlights, social video, and second-screen experiences rather than linear TV moments create new pathways for brands looking to activate within sports.



**Clare Lawson, Global President of Ogilvy**  
**One says she sees the growth from working with sports rights holders and brands. "The huge cultural impact and unprecedented growth of sports make the compelling case for brands, broadcasters, streamers and sponsors to invest in sports as a stage for their brands. Increasingly our brands look to sports as hosts for their sponsorship."**

But getting it 'right' is new terrain. Brands, teams, and leagues vary in their effectiveness at activating fans, leading to mistakes, sponsorships that feel misconceived, tickets not selling or second tier media rights not meeting reserve prices. Savvy consumers have grown wise to brand tactics and will call foul when a marketing moment feels disingenuous or forced. With sports, the stakes are even higher, as the nature of the games stokes closer scrutiny and passionate commentary.

How should sports and the brands they host look to connect with fans and get a piece of the action? Why is participating with fans essential? What is it about fan behavior and culture that requires a different approach to brands? Why are sponsorship rights and logo placement not enough?

Leveraging modern fandom means connecting across a network of live events, diverse media spaces, and the culture at large, and understanding the tensions over control, between what brands deliver and what fan passion demands is crucial.

# FAN ENGAGEMENT IS A BUSINESS FUNDAMENTAL

The modern sports business, a multi-billion-dollar<sup>05</sup> juggernaut built on passion and loyalty, faces a peculiar paradox: its foundation — the fervent devotion of its fans — lies tantalizingly beyond direct control. Fan engagement, while often missing from the balance sheet, is the bedrock upon which the business is built. Fans are the sole source of value, watching at home, subscribing, liking, traveling to events, buying tickets and merchandise, creating atmosphere and giving attention to sponsors. They aren't mere consumers. They are volunteers, a collective force that can elevate a team or brand to glory or plunge it into controversy.

Fan engagement is a business fundamental, but one that remains intangible and hard to capture. The goodwill of fans, the voluntary, ultimate intangible accounting asset, can make or break your business plans. If you build it, they may not come.

If fan engagement is fundamental, then grounding your sports marketing in a deep understanding of fan communities is a first step. Major League Soccer's Commissioner Don Garber<sup>06</sup>, reflecting on the 30th birthday of the league, admitted being skeptical about Atlanta's new soccer team, until they met Atlanta United owner Arthur Blank and his ownership group. They had done their homework, particularly in considering the young, diverse population of the city and youth participation in soccer. Atlanta United now has the highest average attendance in the league, and Mercedes-Benz Stadium is hosting FIFA Club World Cup games this summer and World Cup games in 2026.

Understanding fans can supercharge engagement, fan participation, multichannel storytelling, cross cultural content, direct to fan experiences, apps, connected stadiums and partnerships that go deeper than sponsorship badging.



## FANS DON'T SEE THEMSELVES AS CONSUMERS

Fans aren't simply customers, nor do they think of themselves as customers; they are emotionally invested, displaying behaviors rooted in raw passion. This deep connection fuels what might be perceived as economically irrational decisions, unique rituals, and an unwavering, often lifelong commitment that defies traditional customer marketing logic. Fandom transcends the typical customer-brand relationship, demanding a more nuanced approach.

Fans are aware of this also, as Borussia Dortmund CEO Hans-Joachim Watzke warned, "The German spectator traditionally has close ties with his club, and if he gets the feeling that he's no longer regarded as a fan but instead as



**Jackson Russ, Global Head of Fan Engagement at Ogilvy One says fan attitudes are critical: “Fans do not see themselves as customers. Therefore, addressing fans as consumers can cause friction; you need a different approach. This isn’t simply about transaction but about connection with the fan story and experience.”**

a customer, we’ll have a problem<sup>07</sup>.” This is most apparent in the German Bundesliga, with their structural inclusion of fans as stakeholders in clubs. The Bundesliga historically runs teams as membership associations, in which club members must share 50% + 1 in voting rights. Thus, fans are represented in the business, maintaining involvement and exceptional relationships between fans and the club brands.

But even without such organizational structures, fan appeal works beyond transactions. Casual fans, digital fans catching up remotely, or bucket list fans making the rare pilgrimage to a live game are all looking to connect with something bigger.

Social Identity Theory<sup>08</sup> (Tajfel & Turner, 1979) suggests that fans view their allegiances as integral to their identity; purchases are seen as extensions of themselves. Sports fans aren’t just buying a ticket or a jersey, they’re buying a connection to a story, community, or moment. Camping out for days to buy concert tickets, or the ultra-soccer fans who keep chants and songs going for hours around games, aren’t transactional behaviors. They’re expressions of identity.

The Journal of Sports Economics (2020) showed fans will happily pay top dollar, especially when the stakes are high. Why? The academic consensus includes not only entertainment but group affiliation, escape, self-esteem and eustress, the psychology term for the stress that comes with following the ups and downs of your team<sup>09</sup>.

These deep-rooted identitarian and psychological connections are why the major powers know that sport is unique, and the ambitions of those behind the leagues high. The International Olympics Committee sees their role as one to “Build a Better World through Sport”. The NBA’s mission is “to inspire and connect people everywhere through the power of basketball”. At FIFA, football “Unites the World”.

Brand executive Frank Cooper, whose career credits include looking after the legendary hip-hop business Def Jam Recordings, once asked rapper LL Cool J what made a great performer, who in turn described the impact from fans: “the extent that they could extract a connection and emotion from an audience that made them feel elevated.”



**Executive Creative Directors of Ogilvy One Angus George and Johnny Watters bring to life the paradox of working with fans: “Fan passion means lack of control, which is the challenge for brands. You want the passion, the connection, and the cultural defining moments but brands are not comfortable with a lack of control, and yet, participating in this era of fandom automatically cedes some of that. We see sports fandom having a permission structure which is more acute than in other industries – i.e., fans have expectations of the way teams, clubs, and brands behave and they make their views public.”**

When fans show up for these “elevated moments” they are not employees, over whom you can exert some direct control. Instead, you have to work with them, ideally by permission. Because sometimes the fans don’t like your plan – and if they don’t like it, they might try to change it.

A vivid illustration of the tension between commerce and fan identity is the European Super League debacle. In 2021, major club owners across the continent proposed a breakaway venture to rival the UEFA Champions League, the annual competition that brings together the top clubs in a regional competition.

The Super League proposed that elite clubs would be saved from the unpredictability of relegation to lower leagues based on on-field performance, promising a U.S. model of forever franchises playing amongst the chosen few. It sounded good for the bottom line. But in doing so, it would have eliminated decades-old rivalries and storylines, authentic, cultural

connections between fans and the grassroots of football. It promised to make revenue certain and everything else about football worse.

It was over in 48 hours, uniting the football world in ridicule. Fan backlash against the proposed league, perceived as a cynical venture insulating the big clubs from relegation, was so intense that it forced the participating clubs to withdraw<sup>10</sup>. Fans demanded proper competition, prioritizing their sense of sportsmanship over individual club loyalties. Unlike when dissatisfied consumers walk away, leaving the brand none the wiser until sales slump, fans see themselves as more than passive consumers and are quick to voice their concerns.

PART II

# Fan engagement







now virtual and instant via activism, fan fiction, remixed highlights, and smart memes.

Gamers waiting for the latest version of Grand Theft Auto viewed the trailer for GTA VI 93 million times in 24 hours, but according to YouTube, the remixes, commentary, and reactions created by fans piled up another 192 million views in the same 24 hours. YouTube creators now compete with established media brands for sponsorship and advertising revenue, with the platform holding the largest share of viewing time in 2024 in the US, outperforming Disney, NBC, and Netflix<sup>15</sup>.

Smart, fan-centric creators and independent channels are not new. It's been a decade since the relaxed interviews of COPA90's FIFA and Chill started, while Barstool Sports is of legal drinking age in the U.S. These early successes show the power of the "unofficial", fan-centric and fan-created version of sports content and coverage, which continues to see massive scale.

Jomboy Media is a prime example. Beginning with humorous breakdowns of baseball plays, focusing on lip-reading and interpreting what players and managers were saying, their content resonated with fans. They

have expanded to a range of sports-related content, including podcasts, interviews, and documentaries, becoming a significant voice in the baseball community, influencing how fans consume and discuss the sport.

Fan-centric outlets offer depth and devotion to parts of the fan community that mainstream media won't reach. The Anfield Wrap is a fan-side media group with no conventional rights to games or clips, but they still produce a dozen regular podcasts, plus video and analysis that captures in loving detail the experience and mood shifts of Liverpool Football Club fans.

## UNDERSTAND THE FANS, UNDERSTAND THE BUSINESS

As with audiences for any industry, an understanding and acknowledgment of fan base is essential. For rights holders and brands, spending time and effort to get to know the rituals, attitudes, needs, and wants of fans brings growth, reach, engagement, and monetization. Mapping different types of fan media consumption, values, behavior and journeys, from the hardcore season ticket holder to the casual viewer, unlocks the ability to better serve your supporters and visitors.

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FANS ARE MORE THAN AN AUDIENCE,  
THEY ARE YOUR CREATIVE ECONOMY

A new generation of female content creators like Lissie Mackintosh and Toni Cowan-Brown have created an inclusive way into the world of F1, going behind the scenes and into the business with content that entertains, educates, and doesn't assume prior knowledge<sup>14</sup>.

This shift highlights the power of niche communities and resonates with web guru Kevin Kelly's famous concept of "1000 True Fans," which suggests that creators thrive by cultivating a dedicated following. As Ogilvy's Jackson Russ notes, "clips and highlights are given new meaning by the point of view added by fans and then shared with followers. If fans are engaged in the right way they can become a critical part of your acquisition, retention, and creative department."

Leagues are taking note. The NFL is planning to offer templates, loaded into Adobe Express, for fans to remix and share content<sup>15</sup>. The NBA have long seen fans sharing on YouTube as part of their ecosystem, as commissioner Adam Silver note, "We promote the posting of our highlights. The highlights are identified through YouTube's software, and when ads are sold against them, we share in the revenue. We liken our strategy to snacks versus meals. If we provide those snacks

to our fans on a free basis, they're still going to want to eat meals — which are our games. There is no substitute for the live game experience. We believe that greater fan engagement through social media helps drive television ratings<sup>16</sup>."

Clare Lawson points to the tension: "Brands must ask themselves how they work with the value in fan commentary. Some sports organizations are happy to embrace the creator economy and are perhaps relaxed about the reuse of clips, while others want to defend and police the use of their brand assets. The aim is to find a way that works for your fans and business model."

However, there is an inherent challenge for brands — whether league or sponsor — in recognizing that fans' voices and perspectives are central to the overall sports experience, with the power to influence brand perception. While the dynamic, fan-driven world generates serious value, producing content and sparking real-time conversations means brands cede some control over assets and outputs, as well as any prevailing narrative.

For brands who want to play in the sports space, it's essential they find ways to harness fan energy. Encouraged and permitted, fan-centric



creators add to the culture and provide a unique take on events, with a factory of spin doctors volunteering to add to the buzz. Creators now compete with traditional media outlets for attention and sponsorship revenue with YouTube being one of the strongest creator platforms<sup>17</sup>.

As both producers and consumers of content, fans demand a deeper and more holistic connection to their world — their story might not be the same as the league or sponsors. Authentic connection requires plugging

into the community: engaging, celebrating, and treating fans not as a target market but as valued stakeholders. "Fans peer to peer connection can be more compelling than the official line from brands, leagues or distributors", says Jackson Russ. "The shared experience and shared passions mean fan to fans recommendation are more compelling in the way that word of mouth and fan reviews on a movie can outplay the mainstream reviews."

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FAN ENGAGEMENT

## THE SPORT AND CULTURAL CROSSOVER IS ACCELERATING

Sports crossover is everywhere: Snoop Dogg commentating for the Olympics as an NBC host, Lewis Hamilton using his F1 paddock walk as a showcase for young designers and CBS's UCL show embracing comedy like a late night talk show. A crossover between sports and popular culture is exploding, with gaming, fantasy sports, music, fashion, politics, food, travel all in the mix.



Today's fans, especially those beyond the hardcore, want more than just the game itself. Sharing memes from other fans, insider jokes, and a recognition of the experience of that extraordinary moment on and off the field make the game more than just a game. Fans need to be approached around all their cultural passion points, and new fans might find their way to your brand via off field interests that

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THE SPORT AND CULTURAL CROSSOVER IS ACCELERATING



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intersect with the sport. This cultural shift is driving change, and sports are reacting.

We see this clearly with F1's explosive growth. Though it's been a decade in the making, F1's evolution was exemplified by Netflix's smash-hit "Drive to Survive" docuseries and its crossover to new audiences. Drivers who were once banned from social media were allowed to post, new owners Liberty Media invested in branding, TV and fan engagement and the deal with Netflix. Drivers were brought into the spotlight, out of their cars, helmets off, and made into characters that fans could get to know in an ongoing story. Sport remade as drama is now standard operating procedure.

When Rob McElhenny and Ryan Reynolds invested in Wrexham at a low ebb, they had a plan to make the project a cultural phenomenon from the start with the documentary series "Welcome to Wrexham". Now viewers across the globe can get another chapter in their "so good you wouldn't script it" story with the team's third back-to-back promotion into higher leagues in English football. Though the series doesn't generate direct revenue, the show and its stars have driven the club into a new cultural stratosphere, with sponsorships and additional dollars following.

Smart sports coverage is now anticipating this crossover. For their Olympics coverage, France Télévisions mobilized the whole public service broadcast, not just its sports department, crafting daily shows around the event and elevating its stories to national importance

by engaging the news department as well as sports. Quality sports reporting is still at the core for rights holders, but it's only half the story.

The hugely successful Indian Premier League seemed designed from the ground up with cultural crossover in mind. It delivers a carnival atmosphere, the best global and local players facing off in cricket's intense twenty over game backed by Bollywood stars and business moguls.

The crossover works both ways, as today's athletes and celebrities not only impact culture. Increasingly, we see culture influencing sports. And at this intersection, brands have a chance to thrive, like when Lionel Messi and Bad Bunny teamed up with Adidas for their collaborative collection<sup>18</sup>.

Ogilvy's Johnny Watters and Angus George see cultural crossover as a route to growth: "The smart brands are driving wider cultural reach with connections that play into audience passions as they crossover from culture into sports. New generations of fans look for known and loved cultural guides that they trust to bring them into sport in a way that is authentic, recognizable and relatable."

For sports rightsholders and brands, new fans and extended reach comes from finding the right partnerships and producing compelling content for the wider cultural space. Brands that embrace this cultural crossover in ways that feel authentic and not forced will be able to make connections with fans.



FAN ENGAGEMENT

## GOING DEEPER WITH SPONSORSHIP

Global sports sponsorship is currently outgrowing the economy<sup>19</sup>. Sponsorship is rapidly evolving. In part, because the menu of rights has become so much more than this season's kit badging or display boards. Conventionally, logo placements in sports were about awareness and presence, dictated by where and how long you appeared on screen. The advantage of sponsorship was the context and meaning: F1 might add technology associations, Wimbledon sophistication.

As media fragmentation makes capturing large audiences harder, sport sponsorship has increased value. With sports, you have reliable audiences, communities to speak to, cultural relevance, and attention available for brands to capitalize on.

The best placements establish a natural fit within the sport. Tag Heuer's return to F1 on the timing gantry feels logical. Mastercard picked

the back of McLaren overalls to capitalize on shots of celebratory priceless moments.

For Clare Lawson, "Sports sponsorship is laying a claim to being the global stage for brand partnerships, but brands need to back that up with multichannel storytelling that connects to fans and not simply rely on badging and visibility. Then brands can earn the right to a relationship space with fans."



Sponsorship can take a leap forward by integrating engagement across multiple channels, with earned attention and paid activation alongside rights and placements. This aims to achieve reach, fame, authority, and shared engagement with brand growth. Host and brand activation with multichannel storytelling is synced with spend, including owned and operated channels. The best partnerships build creative storytelling across multiple channels with authentic shared values that work harder for fans, brands, and the hosting sports.

These deeper partnerships are built on shared values and passion points for fans and users. They create exclusive value, experiences, and stories that wouldn't be possible without collaboration between the brands, effectively creating a new platform, intellectual property, and perhaps new inventory. When this aligns with fan engagement, it adds value and authenticity to lasting sponsorship partnerships.

### VERIZON'S EXTENDED SUPER BOWL

Verizon's sponsorship of the Super Bowl created new experiences for fans. Not everyone can go to the Super Bowl in person, but Verizon laid on Super Bowl LIX experiences for customers and their guests across 30 US Cities. They held meet and greets with football legends, sourced local flavors in food trucks and music, and of course, the game played on big screens. Leslie Berland, EVP, Chief Marketing Officer at Verizon said they aimed "to bring that collective excitement and energy to fans across the country with once-in-a-lifetime access they'll never forget," using local and main sponsorships and technology to bring the game to a home field<sup>20</sup>. The Super Bowl FanFest isn't just about showing up and watching; it's about immersive experiences, shareable moments, and becoming part of the story. By empowering fans to be more than spectators; they've extended the Super Bowl experience to a wider fan base.

### COCA-COLA AND THE OLYMPICS – THE POWER OF THE HUG

Coca-Cola celebrated the "real magic" of the Olympics<sup>21</sup> by bringing people together with the power of hugs. These moments were amplified across all touchpoints to make the Coca-Cola hug a symbol of Paris 2024 showing the value of this decades-long partnership<sup>22</sup>. The brand spots showed how sports can be inclusive, with rivals and strangers sharing affection in a hug. Individual cans showed half of a hug, when brought together they created an embrace, while real-time hugs captured during games were shared on social media.

### DOVE'S BODY CONFIDENT SPORT

Dove has a decades-long relationship with women in sport. "We don't just want to slap the Dove logo on. There actually needs to be a real commitment to taking action and wanting to do something." Dove's Stacie June<sup>23</sup> explains Dove ambitions for female participation and cultural impact goes beyond logos and aspires to Body Confident Sport<sup>24</sup>. They empower sports coaches with tips on how to teach positive body image in sports, helping to build girls' body confidence. Their partnership with Nike has created new coaching methods, based on academic research, to encourage teenage girls to continue playing sports, including a YouTube series and Spotify activation as well as the learning program.



FAN ENGAGEMENT

## HOW FANS AND BRANDS ARE REACTING TO THE FRAGMENTED MEDIA LANDSCAPE

The battle for a share of fan attention and spend is going to the next level, with so many entertainment and sport options, and only so much spare time.

Streamers are piling into sports rights, imitating linear television with live appointment-to-view, while linear incumbents like ESPN are about to go direct-to-consumers like the streamers. ESPN is adopting what they call their “parallel paths” strategy, launching a direct to consumer (DTC) service alongside their conventional cable channels, in an attempt to hedge the balance between revenue now and reach for tomorrow. The pre-launch codename of “Flagship” revealed the importance to the sports brand.

Fans are confronted with their own challenge, piecing together a jigsaw of multiple subscriptions to watch all games. NFL fans

are estimated to have to spend over \$1,000 a year, while to catch all the Premier League live games in the UK would cost well over £1,000 and require at least three subscriptions<sup>25</sup>. For tennis fans the situation is worse, with tours and Grand Slams spread over multiple suppliers.

Meanwhile, the question on every media company’s mind: Will Gen Z spend the time and money to watch the full games live<sup>26</sup>? Given the costs and the scatter of live sports rights across platforms, it’s not surprising that younger fans can’t or won’t pay. But within this chaos there is opportunity.

## HOW DO BRANDS AND RIGHTS HOLDERS CUT THROUGH THE NOISE AND CONNECT WITH THIS FRAGMENTED AUDIENCE?

Fan engagement needs to transcend channels and fan attention cannot be taken for granted. Showing up with one angle via one platform isn't going to reach as it once did. Providing value to fans needs to be far more compelling.

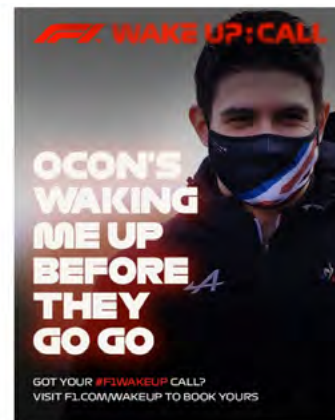
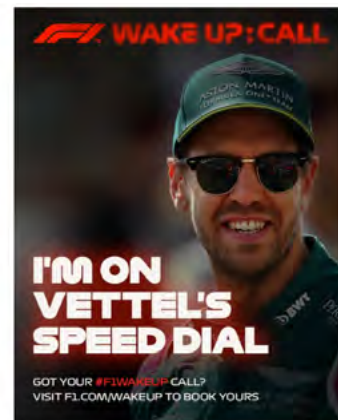
Understanding fans by looking at the unique path of each audience segment is crucial. Take the US Hispanic market, for example—a highly engaged demographic that is increasingly turning to CTVs and social media. They're spending less time with traditional media and embracing a wider range of sports. An incredible 354% growth in Hispanic viewership of the women's NCAA tournament in 2024 provides a golden opportunity to connect with an underserved audience through targeted streaming ads and culturally relevant content, with social channels like @MarchMadness on YouTube or @HoopsForHotties on Instagram.

For FIFA, the MLS, and the growth of soccer in the US, gathering diverse audiences will be vital to success. The MLS Apple TV streaming deal offered the league control over schedules and a way to project themselves internationally. That deal has been adjusted this season to increase reach beyond Apple. The MLS Season Pass is now available through other platforms with the addition of Sunday Showcase which is free to stream and broadcast on linear TV on Fox in English and Spanish<sup>27</sup>. In this way, MLS grows reach and discovery while maintaining the revenue and international home Apple provides.

Still, as fan interests drive the breakaway from traditional sports reporting, crafting content and experiences that resonate with diverse fan audiences is essential. This can be seen in the success of alternative points of view from the likes of 433 and Men with Blazers or Overtime's focus on grassroots basketball.



HOW FANS AND BRANDS ARE REACTING TO THE FRAGMENTED MEDIA LANDSCAPE



FAN ENGAGEMENT



**Johnny Watters and Angus George think that brands need more ways to reach fans: “To capture attention in a fragmented media landscape, brands and sports organizations have to reach audiences where they are, turning up on diverse channels and add them to your ecosystems.” This requires a deep ecosystem of content and assets each with an angle: “You need to get to know each audience segment with its own preferred platforms and content styles, demanding a tailored approach”.**

Leagues and broadcasters are taking note – like the Women’s Tennis Association did when No. 3-ranked star Coco Gauff was asked at the Indian Wells Open how the Association might improve. Her suggestion? More content for the fans: “Obviously I’m someone who is on social media a lot. A lot more TikToks and following the trends that a lot of the other sports are doing, which I know that WTA has a plan in place ... they ask for feedback and that was the main thing I noticed<sup>28</sup>.” The WTA has new YouTube, TikTok and Instagram ambitions, with personal stories of their star players on “Inside The Tour”, highlights, memes, sounds and trends relevant to people who don’t usually watch tennis<sup>29</sup>.

and Eli Manning, providing a more relaxed and authentic approach than the standard coverage. Paramount have signed David Beckham for an alternative “Beckham and Friends” telecast for the Champions League. CBS’s own Champions League Today studio show feels like hanging with presenters Kate Abdo, Jamie Carragher, Thierry Henry and Micah Richards; their insights and playful banter fuel social clips and memes, making these former players-turned-presenters stars all over again.<sup>30</sup>

This same kind of relatability was the key to unlocking F1 drivers for new audiences. Following Hamilton’s lead, we see a next generation of drivers who are serious about their presence outside racing, like Lando Norris’s “full-time life” as a gamer and part-time life as an F1 driver being central to his social presence and brand. F1 used this connection with fans to offer a fan service using automated wake up calls direct from drivers, urging fans in the Americas to wake for early morning appointments to watch live.

In the U.S. “Inside the NBA” were pioneers in this space, with their pregame, halftime, and postgame show becoming as much appointment viewing as the games themselves, as fans awaited the hot takes and arguments of Charles Barkley, Kenny Smith, and Shaquille O’Neal. Even as TNT wraps up its final season of broadcasting the NBA in the U.S., “Inside the NBA” will migrate to another network.

Traditional broadcast media have been widening their approach. The Manningcast offers an alternative broadcast of NFL’s Monday night games fronted by Peyton

## WHAT DOES YOUR NEXT SET OF FANS LOOK LIKE? CREATING INCLUSIVE WAYS TO ENCOURAGE GROWTH

Most Manchester United fans never get the chance to visit Old Trafford. Less than 1% of F1 fans make it to a race. Most fans, most of the time, will be remote. Their experience will be digital, perhaps social with friends, but via a screen. The value of Manchester United and other huge brands – and their ability to field and pay for great teams – depends on this global fan base, media reach and sponsorship impact as much as legacy revenue sources.

In one sense, this is an effect of globalization. The English Premier League, offering allegedly the most competitive version of the beautiful game, has spread beyond the home market, with export revenues now exceeding domestic<sup>31</sup>. This drive for growth is picking up across big leagues, with the NFL teaching the world about American football through stealth education, their Global

Markets Program, and showcasing games in new markets, including Europe and South America<sup>32</sup>.

If you are trying to sell NFL to Europe or soccer to new audiences in America, your globally diverse audiences are going to have different media habits, values, and expectations. Your next wave of fans might not look, behave, and speak like the current crowd.

WHAT DOES YOUR NEXT SET OF FANS LOOK LIKE?  
CREATING INCLUSIVE WAYS TO ENCOURAGE GROWTH

Italy's Serie A had to invest heavily in technology to improve their output for new audiences, as Michele Ciccarese, Commercial & Marketing Director noted in 2020: "Believe it or not, Serie A was only speaking in Italian. Now it speaks in nine languages, in 22 different accounts all over the world, with highlights available in five languages<sup>33</sup>." Disney's Welcome to Wrexham series has given a small-town club from North Wales with a Hollywood story a new global reach, fan membership, and increasing international revenues<sup>34</sup>. The Masters in Augusta, one of golf's most traditional events has been opening up to new audiences in Latin America and America with Spanish language hole-by-hole commentary and AI-personalized highlights<sup>35</sup>.

Arsenal Football club have built strong attendances for the Women's Super League, capturing the growth in women's football. They offer inclusive ticket pricing to attract new fans including families, lionize players across their own media, and foster a sense of community. Two-tier ticket pricing with affordable options and simple "home advantage" ticket packs for home games help build returning support. This investment in women's football has seen repeated record attendances for matches in their North London stadium<sup>36</sup>.

At the start of the latest MLS season, the Seattle Sounders launched a "First Match

On US" program with sponsors. They bet that during the first game, a free taster experience of Sounders' '90 minutes of heart' and the legendary stadium experience at Lumen Field would be enough to convert new fans<sup>37</sup>.

The Indian Premier League now has a women's version of their stunningly successful T20, which has propelled Indian cricket to one of the most lucrative leagues in the world. The heady mix of big-hitting, fast-paced cricket from world-class players, plus investment from Bollywood and Indian business houses has made it the biggest in cricket. The women's league mirrors the franchise system and success with global stars and in their first season, women and girls got free entry, with men paying a nominal fee.

When sports embrace a more inclusive strategy, lowering barriers to entry and making stadium events more accessible, they also generate opportunities for social storytelling and unique coverage that sets the stage for long-term growth.

F1 has been on a long journey of transformation towards becoming a rich, multilayered cultural phenomenon. This focus on opening the sport to new audiences is paying dividends, with F1's latest global fan survey showing that 41% of fans are now female and that the fastest-growing group of fans were women aged 16-24<sup>38</sup>.





FAN ENGAGEMENT

## CREATING A CONNECTION WITH FANS IN THE NETWORKED ERA

If we look at today's world, the dominant organizing system is not the hierarchy, but the network. Enterprises want to be networked organizations, characterized by ecosystems of collaboration. Participation is possible everywhere in our lives, with decentralized platforms offering global communication possibilities to anyone with a mobile phone.

In other words, we are ultra-connected and empowered to engage. Our expectations and ability to use our voices have exploded onto the scene. And yet, we also find ourselves paradoxically challenged to connect because of the sheer volume of options laid before us.

So how do you connect with the ultra-networked fan and communicate clearly with generations that have only ever lived in today's decentralized media culture?

Fan-based brands in sports and entertainment are at the heart of the tensions between hierarchy and peer-to-peer networks, between the center and the periphery, between official narratives and the stories in the crowd, between control and permission.

An artist, athlete, team or brand has to create spaces within their owned and operated channels which are open to fan engagement. These spaces can then intersect with all the fan networks of creators and independents.

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CREATING A CONNECTION WITH FANS IN THE NETWORKED ERA

## CONNECTING TO FANS

To connect, you must create extra value in content and experiences, enabling a peer-to-peer exchange that celebrates, showcases, or chimes with the fan base.

Engagement is foundational. Ultimately, having a direct connection to your own fans is vital. You can build a database on the direct-to-fan experiences and content, bring the remote digital fan closer and connect the live experience stadium fans with a wider base.

Many sports teams and leagues still do not know who is entering their stadium or paying to watch the events on streaming and television services. This leaves them with no understanding or purchase on the fans whose engagement they are dependent upon. The rights holders or brand remain dependent on

buying access, via other people's platforms to their own fans and the missing value.

For example, after Spotify approached Barcelona about a sponsorship deal, reports suggested that the team had surprisingly slim registration of their fan base, and that the deal might have been bigger if Spotify believed they had better ways to understand and access their fans<sup>39</sup>.

This is why sports and fan brands are investing in apps and stadium connectivity as a way to understand their fans. Apps can be more than results and ticketing facilitation, becoming a stage for behind-the-scenes exclusive content and experiences. The best stadiums are now connectivity hot spots, venues functioning as entertainment hubs with technological integration, giant high-definition scoreboards and in-seat ordering through mobile apps. All of this



enhances the overall fan experience. NASCAR and Daytona recently upgraded the connectivity at the circuit to enhance their fan experience and fix issues with wait times via smart entrance gates that use real-time data from fans<sup>40</sup>.

To connect to fans, you might be relaxed about the sharing of your highlights like the NBA, build a beautiful app like the Olympics, have stunning social like Inter Miami or make your stadium a connection hotspot like SoFi in San Francisco. You could drive incredible Fantasy league participation like The Premier League, build a Hollywood-level behind-the-scenes story like F1, be inclusive about your ticketing like Arsenal or give the fans a say, as in the Bundesliga. But all of it is based on engagement. The ecosystem can be deep and wide, but without fan engagement it'll lack the atmosphere and energy to thrive within the community.

Fans want it all: authentic insights, a community feel, relatable personalities and the best moments of the action. You have to find the right mix of free clips, fan content and paid content that works for discovery, reach and subscriptions. This means reaching fans across key moments; pre-match, during the live action, between events and off-season. All the while providing powerful storytelling that has cultural relevance to your community. And on top of it all, of course, fans expect to be entertained.

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