

FUTURE OF SPORT

FOREVER FANDOM

JULY 2024



CHAPTER 2

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INTRODUCTION

Welcome to “Future of Sport,” a four-part series from Backslash and Dark Horses that unpacks what will—and more importantly what should—come next in sport. In our second chapter, we explore how and why expressions of fandom are evolving.

Before we look at the innovations that are changing fandom, we must first understand the human behaviors that won’t change: a sense of shared fiction, reverence for athletic heroes, and the need for social identity.

These are the fundamental motives of fandom that have always and will always exist, and should therefore be the foundation of future-proof ideas and innovations to come. This is especially important as flashy tech and an accelerated trend cycle make it all too easy to get caught up in novelty.

A race to wow fans rather than deliver them lasting value is why we end up with things like worthless NFTs and apps that distract from the viewing experience rather than add to it.

That’s not to say, however, that fandom is at a standstill. It’s actually quite the opposite. New technologies, ownership models, and types of media coverage are allowing today’s supporters to get closer to the action than ever before—opening the door to a more intimate and interactive world of sport. This chapter unpacks these exciting developments and offers guiding principles for brands looking to make an impact.



“If you want to know what the future of fandom looks like, a smart place to start is with how fans have always behaved.”

Melissa Robertson, CEO of Dark Horses



Expressions of fandom are becoming more personal and participatory—turning fans from passive supporters to active contributors.



DRIVING THE SHIFT

→ **Extended reality tech is creating new opportunities for immersion and engagement**

When given a list of six different sports-related VR experiences, roughly 70% of Gen Z and Millennial fans were interested in at least one of them. The top activities of interest included playing sports-related VR games, watching live sports from an athlete's POV, and remotely attending a live sporting event.⁶

→ **Media coverage is extending far beyond the field, offering a more intimate glimpse into athletes' lives**

A sports documentary boom is underway, with upcoming series covering the Boston Red Sox, NFL receivers, NBA stars, Major League Soccer, IndyCar drivers and more. At the same time, more athletes are now producing their own content that takes fans behind the scenes.

→ **AI is allowing fans to choose and customize their own viewing experience**

The market for generative AI in live sports analysis (including personalization for fans) is forecast to hit \$2.3bn by 2032, up from \$170.5m in 2022.⁷

SHARED FICTION

Sports fandom is a classic example of shared fiction: an imaginary concept that holds power purely because society at large believes it does. This made-up reality is core to understanding fandom. Over centuries it has evolved but has never been broken. And in 2024, these shared stories are becoming more personal, accessible, and sensationalized than ever before—ushering in an exciting new era of sporting entertainment.

WAY IN 1

What hasn't changed

If you believe a \$100 bill is valuable and someone else also believes it's valuable, then it is valuable. Sports fandom is the same—it only matters because others believe it matters too.

The two constructs that have always driven this shared fiction are the spectacle and the story. The spectacle is what makes the whole world pause to watch a particular game. It's why 19 of the 25 most-watched programs of all time are Super Bowls.⁸ But while the spectacle can pull in casual fans, it's the story that sustains deeper, more lasting fandom. The triumphs, defeats, comebacks, heroes and villains that live in fans' memories are what creates legend and meaning in sport. This is where the true power of sports fandom lies, and is therefore what future strategies should be rooted in to be successful.

Connection beyond geography

Historically, the sporting stories closest to your heart were also closest to where you lived. Now, thanks to social media and a more connected world in general, fans can access and invest in stories that fall far outside the bounds of their area code. A recent survey found that the majority of 18 to 29- year-old sports fans in the U.S. support a team outside the place they grew up (54%) or the place they currently live (64%).⁹ This marks a notable shift from the hometown loyalty held by previous generations. In turn, we'll see new digital communities like Fanera that are forged by interest first, location second.

Excitingly, this lack of geographical limits is also creating opportunities for local grassroots sports to gain an unprecedented level of worldwide attention. The massively popular village basketball league in rural China is a perfect example. Held in the rugged hills of Guizhou province, the free CunBA games are livestreamed on Douyin and viewed by millions of fans who are drawn to the league's purity. Even without any big sponsorships or media dollars, the story is strong enough to organically attract fans across China and beyond.



Customizable realities

Not only do we have immediate access to sporting stories from all over the globe, we can also consume a single one of those stories a hundred different ways. If a major game was once broadcast on just a few primary TV networks, for example, it's now covered through multiple streaming services, social media channels, and podcasts—all with their own unique perspective and storytelling style.

This in turn is allowing sports coverage to take on a different vibe for different audiences that may otherwise be uninterested—like kids. The NFL is at the forefront of this. Last year, they partnered with Disney+ and ESPN+ to launch a “Toy Story” themed broadcast that used motion-capture technology to animate the players as if they were toys playing in Andy's bedroom. ESPN said it was the [biggest live event](#) on Disney+ to date. Similarly, the quirky kid-friendly 2024 Super Bowl broadcast on Nickelodeon averaged about [1.2 million](#) viewers.¹⁰

Looking forward, opportunities for customization will be further amplified by even more data and even more [immersive tech](#). Imagine watching a completely bespoke broadcast that emphasizes the stats of your favorite players, gives you live on-screen updates of your fantasy league standing, and is visualized in the imaginary environment of your choice. As far out as it may sound, this is already where things are headed. In February, the NBA [premiered](#) a voice-activated generative AI tool that can switch the game into alternate aesthetic modes on command. During the demonstration, the AI responded to a request to see a live Indiana Pacers game “as a Spiderman movie,” quickly converting the footage into a superhero aesthetic with animated players, comic-book graphics and dramatic music.

To ensure that this new level of individualization doesn't take away from the communal feel, enabling fan-to-fan interactions will be key. Will there be a way to invite people into your unique reality for a shared experience? Will fans still be able to live chat and share their reactions across different viewing modes?

“We don't watch sports for happiness; we watch for drama. In life and in sports, people want to experience the rapture of being fully alive, with struggle and defeat and misery and resurrection, heroism and enchantment and those short and misleading winning streaks that spark the flames of irrational optimism all over again.”

David Brooks, [The New York Times](#)

The blurring of spectacle and story

The third major change to our shared fiction is an accelerated blurring of the lines between sport and entertainment culture. This is evident in how live sport is being shaken up as rights holders dial up the spectacle inside venues. Max Verstappen [described](#) the inaugural Las Vegas Grand Prix as “1% sport, 99% show,” while LIV Golf is challenging the status quo with concerts, player walk-up songs, and dedicated ‘[party holes](#).’ The increase in celebrity-backed teams—from Ryan Reynolds buying Wrexham to Michael B. Jordan investing in Bournemouth FC—is also overhauling the traditional football business model to be more entertainment-forward.

Something for everyone

The unifying theme across all three of these changes is a shattering of limitations. Today's fans can choose to pledge their allegiance to any team anywhere, and to consume whatever version of a sporting story (or spectacle) appeals to them. Brands can get involved by opening up new gateways to sport through universally captivating entertainment or adjacent interests. The beauty of shared fiction, after all, is that it offers something for everyone—even those who don't consider themselves “fans.”

WHAT IF...



New platforms fueled global fandom around amateur players and grassroots leagues? Bringing visibility to untold sporting stories.



Brands gave fans an active role in the sporting stories they love? Making them key characters rather than passive spectators.



Customizable viewing experiences allowed fans to set their ideal dose of data, sensory stimulation, and spectacle?

FOLLOW YOUR HEROES

WAY IN 2

The biggest asset within the sporting story is, and always has been, its heroes. But while these heroes were once untouchable figures on a TV screen, they're now becoming direct competitors in the video games we play, personal trainers in our daily lives, and stars of deeply personal documentaries. This new level of closeness means one-dimensional player-fan engagement strategies will no longer be enough to break through.

What hasn't changed

The connection between fans and their heroes has always existed. Milo of Croton won his 6th Olympic wrestling title in 520 B.C., and paintings were still being created of him in 1900. Over two and a half thousand years later, this same level of admiration is evident all around us—from posters that adorn the walls of children's bedrooms to replica jerseys being worn on the street.

This desire to celebrate and immortalize our heroes in tangible ways is nothing new. What is new, however, are the *intangible* platforms and technologies that are bringing us closer to our favorite athletes than we ever imagined possible.

Play with your heroes

It used to be that the closest you could get to professional athletes was watching them from the stands. But that's no longer the case as technology places us in the action right alongside them. In the F1® World game, for instance, racing fans can attempt to beat lap times set by stars like Max Verstappen and Charles Leclerc. Cycling platform Zwift has taken this concept one step further with pro-am races that allow amateurs to race against professionals in real time.

And if competing against your heroes doesn't feel close enough, why not just pretend to be them? Look to how Aston Villa is putting body cams and mics on players so that fans can experience the game from their point of view, or how the NBA app is letting users scan themselves to create their own avatar that overlays an actual player in real time. With 66% of millennial and 62% of Gen Z sports fans saying they would pay to watch a sporting event from an athlete's perspective in VR, these activations are just the beginning.¹¹



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SPORT

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Train like your heroes

Perhaps even more interesting than how we follow our heroes during the game is the new ways we're able to monitor them outside of it. We're already seeing this with revered athletes like [Cristiano Ronaldo](#) launching their very own wellness apps that allow fans to mimic their personal workout plans, specialized diets and mental health strategies. As a next step, detailed health data could allow for even deeper personalization and proof of effectiveness. In a future where DNA testing is the norm, for example, we might see health coaching apps that match fans with pro athletes based on genetic similarities. Or, perhaps fitness wearables will one day allow you to track your personal training stats against the stats of your favorite players for extra motivation.

This is sure to become a bigger marketing play too. While previous athlete endorsements told fans to drink this drink, buy this equipment, or wear these shoes in order to play like their favorite athlete, future campaigns will have the biometric data to actually prove what's working.

A more personal connection

While data is allowing for deeper insights around how an athlete performs, more intimate forms of media are providing insight into who an athlete actually is. The recent Beckham documentary is a prime example—showing the personality and vulnerability of a player who has long seemed too perfect to be relatable. Fans became even more enamored as a result. This marks a significant shift from the days when stoicism was celebrated as a strength and media training taught athletes to be guarded in their replies.

If we've moved from a broadcast model to a documentary one, the next stage is athletes taking greater control of their content creation and distribution. In the world of freeskiing, [Cody Townsend](#) and [Nikolai Schirmer](#) have built huge audiences by producing their own videos direct-to-consumer. And in the world of golf, Bryson DeChambeau is blurring the lines between YouTube influencer and U.S. Open champion. If more athletes follow suit, we could see a radical change to the media model where fans are able to bypass pricey subscriptions and follow their favorite pros directly. Emerging platforms like [Heros.xyz](#) are already pushing us toward this future by helping athletes monetize their content through paid subscription models.

31% of Gen Z fans want access to behind-the-scenes content from athletes as part of the streaming sports-viewing experience.¹¹

Deloitte, 2023

From passive to interactive

Today's fans don't just want to watch their heroes—they want to play alongside them, train like them, and be invited into the most personal corners of their lives. Brands can deliver by unlocking exclusive access that makes fans feel like the true insiders. This is especially important in a world where the influence of individual superstars now extends beyond the teams, franchises, and even nations they represent.

WHAT IF...



New loyalty models allowed fans to accumulate points in exchange for exclusive access to their favorite players? So the more support you show, the closer connection you unlock.



AI training apps allowed fans to be coached by their heroes? Leveraging their personality, mental strategies, and techniques for extra inspiration.



INDIVIDUAL IDENTITY

WAY IN 3

One of the fundamental motives behind sports fandom is the human need for belonging and social identity. This is why we invest our time and money into supporting athletes we will likely never meet, and why we wear team logos with such pride. Fans will forever do this, but the “how” and “why” behind it is evolving.

What hasn't changed

Fandom has always served as a public badge of honor. We saw this in the Byzantine times with supporters wearing the colors of their chosen chariot racing team, and we see it today in the many millions of fans who proudly rock sports merch and belt out team chants. [Studies](#) have even shown that for fans, being identified with their favorite team is more important than being identified with their work and social groups, and is as or more important as being identified with their religion.

This connection between fandom and individual identity isn't going anywhere. If anything, it's only getting stronger as more traditional sources of belonging like workplaces and religion show signs of decline. What is changing, however, is how and why people are expressing their identity through sport.

Virtual identity signaling

Up until recently, the places we could flex our identity were largely limited to the physical world. But as we spend more time in digital environments, even greater possibilities for self-expression arise. The primary way this is happening right now is through digital apparel and accessories. Meta's Avatars Store offers official clothes from NBA teams and clubs like Liverpool FC, while Fortnite players can don virtual jerseys representing NFL teams and the world's biggest soccer clubs.

Digital collectibles are giving fans new ways to prove their allegiance too. We say this despite the high-profile collapse of the sports NFT market. This isn't because NFTs are a lost cause, but rather, because sports organizations were turning anything and everything into NFTs instead of using them to immortalize the moments that really matter. NFTs can once again be valuable, but only if they follow the same principles that have driven demand for physical memorabilia for decades: rarity, exclusivity, investment value, and social currency.



Values on display

Beyond the how, why we choose to support certain teams and players is also changing as personal values are put on display. Previous generations of athlete activists risked harming their careers for daring to enter socio-political debates. Back in 1967, Muhammad Ali was excluded from boxing for refusing military draft in protest against the Vietnam War. Fast forward to today, and athletes aren't just allowed to take a stand, they're often backed by big groups of supporters—and sponsors—when they do. Allyson Felix's opinion piece about Nike's lack of support during her pregnancy grew her already-impressive following and became the launchpad for her multimillion dollar shoe business. And similarly, Naomi Osaka became the highest paid female athlete in the world in 2020 while supporting the BLM movement and other social causes.¹²

This overt mixing of sports and ethics is raising the stakes for brands in the best way possible. Choosing to sponsor a particular player or a team now means you're also choosing to stand behind what they represent—personal beliefs, passions, faults, and all. It also creates an opportunity to harness the collective power of their fandom for good. Don't just give supporters a way to show off their values, give them tangible ways to put those values into action and contribute to real change—whether through crowdfunding efforts, petitions, or local activations. Being a part of something bigger is the ultimate identity marker.

From spectators to stakeholders

The tie between fandom and identity is also evolving through the lens of ownership. Beyond just owning merch or trading cards, many of today's fans are being given the opportunity to own entire clubs—taking back some control from billionaire owners and restoring a sense of community and grassroots connection. While not uncommon in the international sports world, these cooperative ownership models are only growing. International sailing competition SailGP is launching its first-ever fan-owned team that grants owners equity, voting rights and exclusive member benefits; a group of about 140 people in the U.S. recently pooled their cash to buy a struggling Danish soccer team called Akademisk Boldklub; and DAOs like CO92 are giving everyday fans the chance to own a stake in professional sports.

These efforts are being fueled by frustration with financial failures as well as a much larger push to democratize sports ownership. For fans, it also represents the ultimate badge of honor—a kind of social proof that you care enough about a team to invest your own time and money into its success.

“Being a fan means wearing the colors, knowing the chants, memorizing the numbers. It means being part of a family or maybe part of a cult, which in these fractured times can both feel very appealing.”

Chris Vognar, The New York Times

Give fans a role

Today, proving your loyalty means much more than buying a T-shirt. It means showing off your fandom in the digital world as well as the physical one, caring about social causes outside of sport, and literally investing in a team's success. Brands can fuel this need for belonging by giving fans a greater sense of ownership and control—even if it's as simple as letting them submit and vote on jersey designs. The bigger the role they have, the prouder they'll be to show off those markers of identity.

WHAT IF...



Fans could accumulate digital tokens that unlocked voting rights? Giving them a say in everything from team merch design to VIP fan experiences.



Brands highlighted social causes in place of their logo? Allowing fans to support their favorite athletes by backing the issues they believe in.



THE TEAM

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EDGES SHAPING THE FUTURE OF SPORT

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ARTIFICIAL CREATIVITY

AI is proving itself as a creative force to be reckoned with—pushing the boundaries of our imagination and enabling the masses to become makers. As previously held notions of creativity are shattered, matters of ownership, the value of human-made vs. AI-made, and the preciousness of the creative process will continue to come into question.

CONNECTION QUEST

We're simultaneously more connected and more isolated than ever before. With our world no longer built to facilitate face-to-face interaction, new social spaces, apps, and business models are stepping in to fill the void. The connection economy is booming, and it might just heal our collective well-being.

HEALTH HEDONISM

A once-sterile healthcare industry is taking cues from the pleasurable parts of wellness, ushering in a more holistic and hyper-personalized approach. As wellness becomes both a lifestyle and a belief system, everyday rituals will get a self-care makeover. Who says the journey to better health can't be enjoyable?

LIQUID REALITY

It's the end of reality as we know it. From synthetic media to the rise of virtual everything, immersive technologies are ushering in a heightened era of on/off-line blur. As the limits of our physical world are shattered, new possibilities for self-expression and deeper engagement abound.

NEO-COLLECTIVISM

A renewed emphasis on collectivism is redistributing power at scale. Realizing that individualism can only get us so far, brands and organizations are relinquishing control and inviting participation in the form of decentralization, crowdsourcing, and co-creation. The future belongs to all of us.

ODD-VSSEYS

A world exhausted by rationality is finding delight in the discomfort zone. With so few roads left untraveled and questions left unanswered, alternate realities and out-of-this-world adventures will feed our hunger for escapism. It's time to revive our sense of wonder.



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METHODOLOGY

This report was born from months of in-depth qualitative and quantitative research, strategic ideation, and collaboration between Backslash and Dark Horses. It also includes input from 56 Backslash Culture Spotters across 22 global TBWA offices. Our Spotters bring expertise from their work on some of the world’s biggest athletic companies and sports sponsors—from Adidas to Gatorade to Nissan.

This is an independent research report. None of the entities or individuals referenced herein has endorsed or otherwise participated in this report.

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THANK YOU.



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Discover more at backslash.com and darkhorses.com.

Stay tuned for **Chapter 3** coming soon.