LS:N GLOBAL

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Game-Changers

The Future of Sports Fandom

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Front cover: Adidas and 100 Thieves, US; Above: Nike NWSL 2024 Kits, US

Topline Takeaways



Sports Transformed

A new era of sports fandom is being ushered in, driven by new technologies, new geographies, and a new attitude towards sport itself that prioritises inclusivity, accessibility and joy



Fresh Frontiers

New sporting epicentres are emerging that are shifting the focus away from the historically sport-dominant West due to a combination of public health policy and investment in infrastructure



Female Fandom

Across sport, interest in women's sport is peaking, with unprecedented numbers of fans supporting them in stadiums and at home – showcasing the previously untapped financial power of this category



Wellness Wave

Having integrated healthier habits into daily routines during the pandemic, most people regard playing a sport as a lot more fun than going to the gym. This adoption of active pursuits is creating a demand for new types of sport too



Diverse by Design

A noticeable shift in the sports industry is being driven by sports brands themselves. To shed outdated traditionalism, brands are adopting new identities that promote inclusivity and accessibility



Game, Set, Sports!

Building sports fandom is challenging when most young audiences show little interest in watching sports, which is why sports organisations are racing to launch partnerships on gaming platforms such as Roblox and Fortnite



Beyond the Storefront

With consumers choosing sports to seek out community, brands are now transforming their retail spaces, acting as a conduit through which consumers can connect with each other



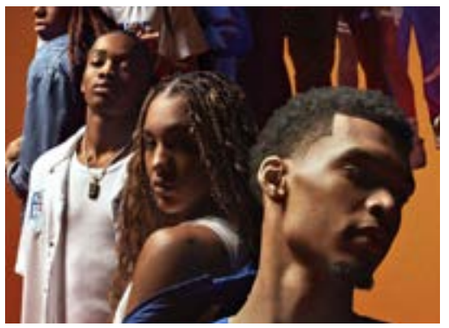
Sporting Getaways

Recognising the need to integrate sports fandom into hospitality packages, businesses in this sector are innovating to provide consumers with wa 24/7 fan experience



Digital Loyalty

Blockchain can offer solutions for closing the gap between fans and their favourite sports, enabling monetisation of their connection and giving fans a real stake in the game



Civic Fandom

If brands can successfully convert audiences into fully engaged fans, it won't be long before fans start seeking a higher purpose from the sport, the brand and themselves

Key Statistics

: The Saudi Arabian government aims to increase the proportion of individuals exercising at least once a week to **40%** by 2030 (source: **Jing Daily**)

: **44** fashion houses seated athletes in the front row to preview their spring/summer 2024 collections (source: **Vogue Business**)

: Lewis Hamilton generated **£1.3m** ($1.7m, €1.6m) in earned media value after attending Louis Vuitton and Rick Owens shows in 2023 (source: **Vogue Business**)

: A 2023 UK YouGov report revealed that only **31%** of engaged fans aged **18–24** watch sports live on television (source: **YouGov**)

: FIFA World has become the most visited* branded sports experience on Roblox, with over **17.5m** visits and a highly positive community rating of **83%** (source: **FIFA**)

: The five debut franchises in the Women's Indian Premier Cricket League tournament sold for almost **£156m** ($200m, €184.8m) in 2023, surpassing the combined value of the eight founding Men's Premier League teams in 2008 (source: **The Times of India**)

: Sports tourism market accounts for about **10%** of global tourism expenditure and is expected to grow by **17.5%** between 2023 and 2030 (source: **UNWTO**)

: The global sports hospitality market was valued at **£3.7bn** in 2020 and is expected to expand at a CAGR of 23% to reach a market value of £15.8bn in 2027 (source: **Research and Markets**)

: In 2023, Manila set new records for the highest single-game attendance of **38,115** at the International Basketball Federation (FIBA) Basketball World Cup, surpassing the previous record set in Canada in 1994 (source: **Doha News**)

: Revenue from elite global women's sports is set to hit **£1bn** in 2024 – a staggering increase of over **300%** from 2021 (source: **Deloitte**)

: In April 2024, **2.45m** viewers tuned into ESPN for the Women's National Basketball Association (WNBA) draft, not only shattering its own record but also surpassing Major League Basketball (MLB) and National Hockey League (NHL) draft viewership in 2023 (source: **ESPN**)

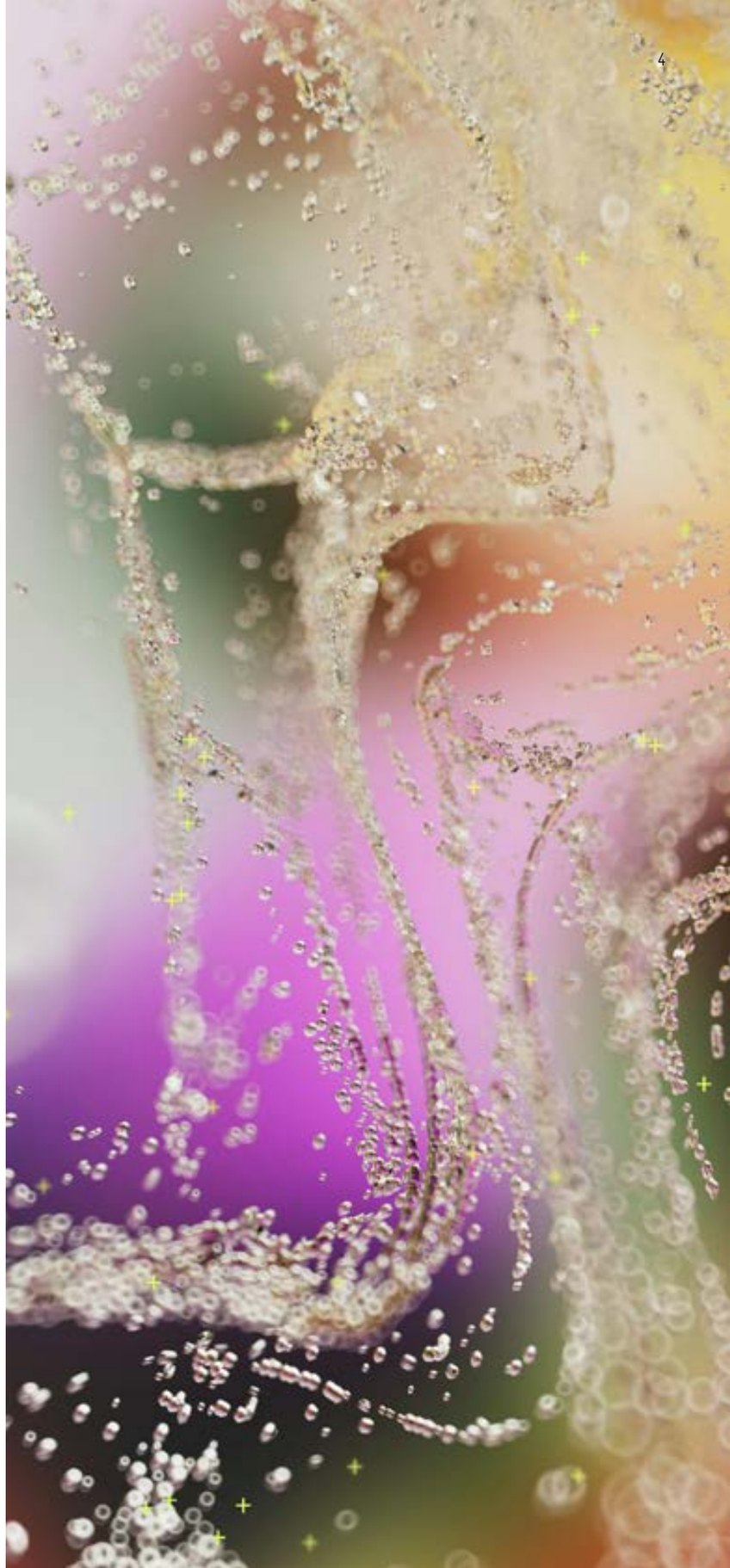
: Some **23** National Football League (NFL) teams boast over one million followers each on TikTok, with videos routinely attracting more than **100,000** views (source: **ESPN**)

: Almost two-thirds (**65%**) of Gen Z self-reported as struggling with at least one mental health issue between 2020 and 2022 (source: **Oliver Wyman Forum**)

: Gen Z are spending nearly **70%** less time with friends in-person than those of the same age in 2003 (source: **Office of the US Surgeon General**)

: A 2022 poll of almost **1,900** self-identified adult US F1 fans revealed that **53%** credited Drive to Survive as the reason they became race viewers (source: **GQ**)

: Meanwhile, across the pond, only **28%** of UK families eat dinner together in the evenings (source: **Sainsbury's**)





Adidas featured Chinese breaker B-Girl 671 in its brand film ahead of the Paris 2024 Olympics, Germany

Introduction

By embracing new technologies, geographies and audiences, sport is becoming bigger than ever and offering valuable lessons on nurturing a new era of fandom.

In April 2024, Women's National Basketball Association (WNBA) All-Star Caitlin Clark made headlines. Depending on where you get your news, you were either reading about Clark being the first overall pick by the Indiana Fever, the light pink satin Prada two-piece she wore on the day or how women's basketball tv ratings are soaring. The confluence of these factors perfectly illustrates the transformation that sport is undergoing today.

For a long time, sport has been codified for Western, male audiences. From cricket and rugby to football, most professional sports have had powerhouses in the West from where they've been exported to the rest of the world.

This dynamic no longer holds true. The Middle East, South and Southeast Asia are vying to be headquarters for these sports, investing in top-of-the-line infrastructure along with public health policies designed to develop passion among their populations.

It isn't just about who is playing sports, or where, either. The very definition of sports has come into question, with younger audiences shifting the long-standing emphasis that has been placed on performance, athleticism and even elitism. The burgeoning interest in hiking, padel and pickleball shows how accessibility, connection and enjoyment are superseding the long-standing sports values of endurance and physicality. Professional organisations are taking note too: the 2024 Paris Olympics is the first to introduce breakdancing.

For many, interest in sports might not have originated from sports at all. Perhaps it came from tracking corresponding fashion trends such as #gorpcore, #tenniscore or #blokecore, or watching Hollywood sweetheart Zendaya star in the tennis blockbuster Challengers. Or maybe a Taylor Swift fan decided to tune into the Super Bowl to catch a glimpse of Swift's new National Football League (NFL) beau Travis Kelce.

'Thanks to her romantic life, Swift had more mentions in sports communities on Reddit than in music and entertainment communities,' Steve Huffman, CEO of Reddit, affirmed at Cannes Lions 2024.

Cross-sector collaboration is just the beginning of how sports, and subsequently fandom, are being rewritten. New technologies will enhance the fan experience not only in stadiums, but also before and after the game. Meanwhile, Gens Z and Alpha will develop an affiliation for sport without ever stepping into a stadium, instead embarking on unique sport experiences on Roblox or Twitch.

As traditional markers of achievement – home ownership, marriage, having children – fade in importance, the desire to unlock achievements can be fulfilled through sporting accomplishments, further feeding the demand to watch, play and participate.

Lessons can be learned from this report that extend beyond sports fandom. Ultimately, a driving force propelling this industry forward, and which we first identified in the microtrend **Mass Movement**, is the human desire for connectivity and finding your tribe, curiosity and courage, and seeking contentment while embracing imperfection.

Drivers

The sports sector is in growth mode, attracting audiences from fresh markets and reshaping fandom across innovative new platforms. These drivers point towards a burgeoning new economy of sports, ushering in a new era of super-fandom – offering lessons for brands across multiple sectors.



Fresh Frontiers

New sporting epicentres are emerging that are rerouting sports away from Western capitals to passionate fans across the Middle East, South and Southeast Asia



Female Fandom

Women’s sport is serious business, as evidenced by loyal audiences consistently showcasing their unwavering support



Sport Unveiled

Netflix, social media and docu-series are breaking the fourth wall between athletes and audiences, bringing them even closer together



Wellness Wave

The post-pandemic prioritisation of wellness has pushed sports to the fore, and more people are adopting sporty lifestyles whether that’s padel or a slow hike



Play Pals

Sports’ unique ability to foster camaraderie and friendship has thrust it into the spotlight, especially as loneliness is on the rise across generations

Fresh Frontiers

From football in Qatar to basketball in The Philippines, new sporting epicentres are emerging that are shifting focus away from the historically sport-dominant West. But this zeal for new sports hasn't developed overnight. Governments have been making concerted efforts through public health policies to foster an affinity for personal fitness among their citizens.

According to **Jing Daily**, the Saudi Arabian government aims to increase the proportion of individuals exercising at least once a week to 40% by 2030. The country's Ministry of Sports encourages participation in community sports groups and marathons through cash prizes, incubation programmes and social media campaigns.

Governments investing in public infrastructure to promote sports development, combined with a growing interest in personal wellness and leisure routines, is propelling the popularity of sports in previously untapped markets – and unlocking opportunities for brands to capitalise on the expanding fan-sphere that comes with this.

In 2023, Manila, capital of The Philippines, set new records for the highest single-game attendance at the International Basketball Federation (FIBA) Basketball World Cup, surpassing the previous record set in Canada in 1994 (source: **Doha News**).

Similarly, baseball – an archetypal American sport – is laying down roots in South Korea, where enthusiastic crowds celebrated the first Major League Baseball game being hosted at the capital's Gocheok Skydome arena in March 2024. Tickets for the country's first major league regular-season games reportedly sold out within an hour (source: **The Athletic**).

Global Driver : Micro-globalisation

As new sports gain popularity beyond the West, the world feels smaller as people share the same common interests





Above and left: What if you can? by Wieden+Kennedy Amsterdam aims to inspire young women in Saudi Arabia to discover their potential

What are Drivers?

Drivers are fundamental shifts and external forces that have the potential to reshape the future trajectory of a brand or business, also sometimes referred to as mega-trends or global forces of change. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative

The 2023 FIBA Basketball World Cup set a FIBA single-game attendance record of **38,115** fans in Manila, The Philippines

Source: Doha News



Nike NWSL 2024 Kits, US

Female Fandom

American tennis player Billie Jean King once said 'sports are a microcosm of society'. Reflecting this, recent years have shown a promising shift towards gender equality, with women's sports experiencing a spectacular boom.

According to Deloitte's Technology, Media and Telecommunications Predictions 2024 **report**, revenue from elite global women's sports is set to hit £1bn ($1.28bn, €1.18bn) in 2024 – a staggering increase of over 300% from 2021.

Gone are the days when women's sports were viewed as token or as the poor relation of men's sports. There is now serious money in the game. When the England Lionesses played the USA in women's football in 2022, it became the fastest-selling England game at Wembley Stadium in London, selling out in less than 24 hours.

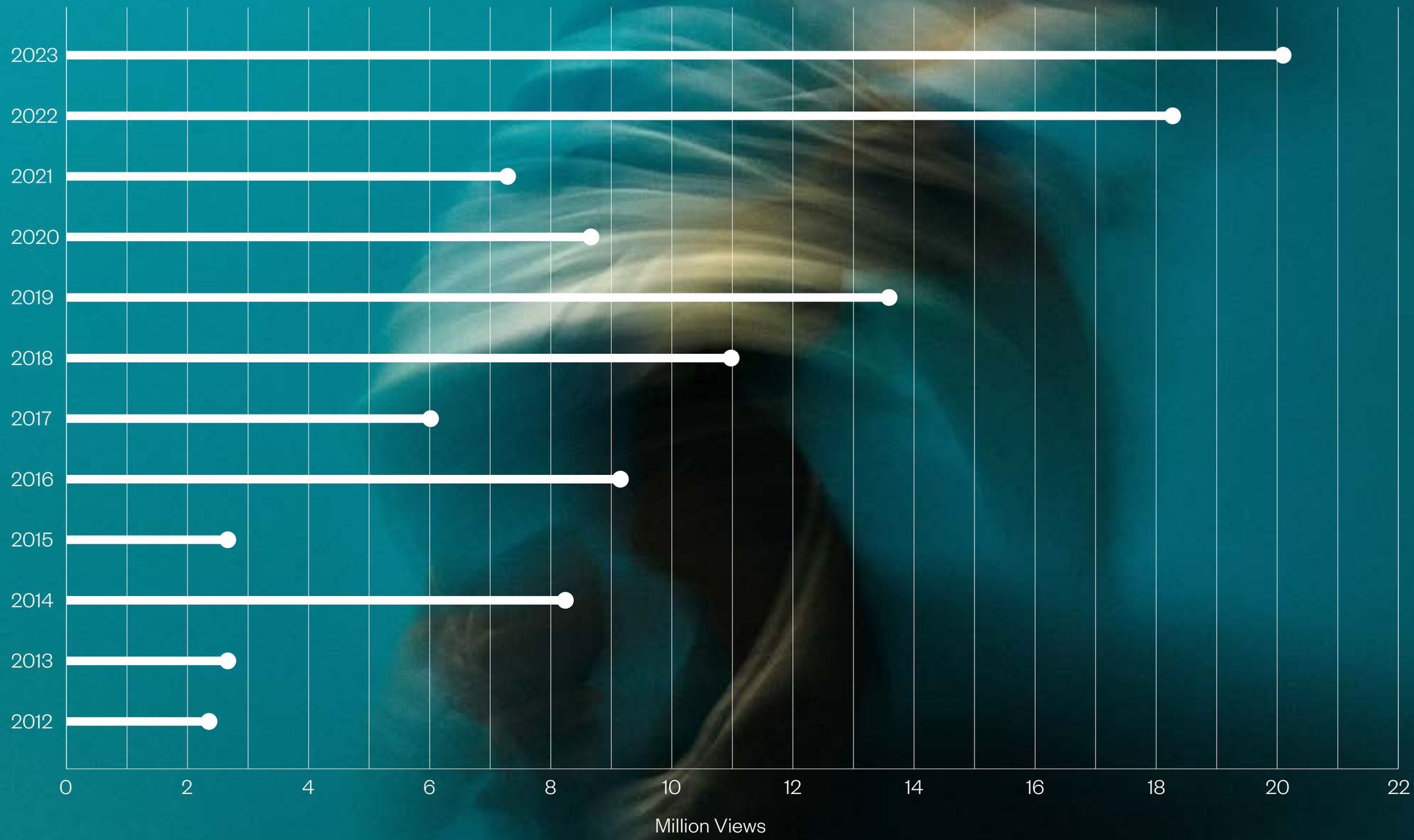
While women's football demonstrates a mindset shift in a male-dominated sport, it also shows how huge financial opportunities can be unlocked in other sports. The five debut franchises in the Women's Indian Premier Cricket League tournament sold for almost £156m ($200m, €184.8m) in 2023 a few months before the league was inaugurated – surpassing the combined value of the eight founding Men's Premier League teams in 2008 (source: **The Times of India**).

Audience numbers are soaring, presenting a golden opportunity. According to **Broadcast Now**, in the UK average viewing time for women's sport has risen 16% year on year since 2019, showcasing increasing engagement. In April 2024, 2.45m viewers tuned into **ESPN** for the Women's National Basketball Association (WNBA) draft, not only shattering its own record but also surpassing Major League Basketball (MLB) and National Hockey League (NHL) draft viewership in 2023.

Global Driver : Evolving Demographics

As more woman play, watch and develop a passion for various sports, the demographical makeup of fans will change - a shift brands must pay attention to

The growth of women's football in the UK



Adidas, Germany



Puma and Formula 1, Germany

There is little doubt that last season, which saw some races increase their 2021 figures by as much as **73%**, benefited overwhelmingly from the Netflix Effect

Source: ***Motorsport*** ***Tickets***



The Formula 1 Exhibition in London gives fans behind the scenes access to one of the most hyped sports, UK

Sport Unveiled

In 2017, US-based entertainment company Liberty Media acquired Formula 1, a motorsport that had been losing both viewers and ticket sales. To attract younger fans and expand the sport in the US, Liberty Media partnered with streaming giant Netflix to create a documentary. Enter Drive to Survive, released in March 2019, which transformed the sport's course – or should we say racetrack? – entirely.

A 2022 poll of almost 1,900 self-identified adult US F1 fans revealed that 53% credited Drive to Survive as the reason they became race viewers (source: **GQ**). Recognising the power of emotional and intimate storytelling, other sports such as tennis and golf have adopted this approach. Even motorsport competitor NASCAR has tapped into this desire for behind-the-scenes, personality-driven engagement, launching Full Speed on Netflix in January 2024 with the aim to revitalise its ageing and dwindling audience.

It's not just Netflix providing fans with a closer look at athletes. Social media has, of course, played a significant role in authentically connecting audiences with their favourite teams and players. Some 23 National Football League (NFL) teams boast over one million followers each on TikTok, with videos routinely attracting more than 100,000 views (source: **ESPN**).

With 68% of Gen Z in the US using apps like TikTok, according to **Morning Consult**, organisations have an opportunity for real-time, global engagement through content that is humorous and irreverent while also being revealing and informative.

Global Driver : Accelerating Technology

New technologies will foster a more emotional connection between athletes and fans, giving fans intimate insights into athletes' lives

Drive to Survive Week 1 Viewership Figures



Photography by Jenda Kubeš

Wellness Wave

According to Patricia Ladis, a New York-based holistic physiotherapist, ‘the pandemic played a huge role in altering people’s routines and helping them engage in sports beyond using an elliptical machine at home’. Indeed, the pandemic offered people the opportunity to re-assess their physical and mental wellbeing, with many vowing to prioritise their wellness at any cost.

Realising that playing a sport is a lot more fun than just going to the gym, more people are adopting a sport – not just an exercise – mindset, giving rise to trends such as **Racquet Culture** and #**hotgirlwalks**. This integration of sports into daily routines is also merging active pursuits and hobbies, which in turn is democratising the sector. It isn’t just football or tennis that are attracting more participants; pickleball, hiking, slow running and even pole dancing are gaining traction and pushing the definition of what sport actually is.

As identified in our Generation Z **report**, almost two-thirds (65%) of Gen Z self-reported as struggling with at least one mental health issue between 2020 and 2022 (source: **Oliver Wyman Forum**. For Gen Z, this focus on mental and physical wellbeing is non-negotiable, further pushing physical wellness through sports and activities to the fore.

Global Driver : Evolving Demographic

Physical and mental fitness have become non-negotiable for younger generations, who see this as an integral element of their wellbeing



HOKA partnered with designer & digital creator Nicole McLaughlin to wet consumer appetite for trailwear, US

‘Apps like Strava aren’t about reaching your goals. They are about being able to continue the conversation into the week’

Holly Swinyard, author, A History of Fans and Fandom



Adidas redesigned the Ultraboost 5 to give runners more energy, Germany



Rapha’s Spring/Summer 2024 collection was designed by women riders, for women riders and includes cycling-specific performance wear for Muslim women, UK

Play Pals

Loneliness is on the rise across generations. In May 2023, the US Surgeon General issued an advisory highlighting the public health crisis of loneliness, isolation and lack of connection in the nation (source: **US Department of Health and Human Services**).

This reported that 15–24-year-olds are spending nearly 70% less time with friends in-person than those of the same age in 2003. Meanwhile, across the pond, only 28% of UK families eat dinner together in the evenings (source: **Sainsbury’s**).

The yearning for friendships, connections and a sense of belonging has helped thrust sports into the spotlight. Its unique ability to foster camaraderie and celebrate shared passions extends beyond team sports like football or cricket to individual activities such as running. The London Marathon made history when 840,318 people entered the ballot for its 2025 edition, marking an increase of 261,696 entrants from the previous year (source: **Runner’s World**).

From slow running to hiking and skating, community-centric sports are emerging everywhere, a trend we first identified in **Mass Movement**. Some groups, like Black Girls Skate or Daytimers Run Club, cater specifically for minority communities, encouraging people to find comfort and joy in connecting – or reconnecting – with their culture.

Global Driver : Dislocated World

As loneliness continues to create divides in society, sport has the potential to bring people closer togeather through shared passions and fandom

Insight

Recognising a new typology of sports consumer, brands and organisations are innovating to engage these new-era fans in more creative ways, connecting with them through their varied passions and moving far beyond traditional tv viewing and in-stadium attendance.



Diverse by Design

To shred outdated traditionalism, brands are adopting new identities that promote inclusivity and accessibility



Haute Athletics

As fashion vies for maximum attention, athletes, with their enormous global influence, have become a new touchpoint for brands to connect with audiences



Game, Set, Sports!

As young audiences show little interest in watching sports, gaming is fast emerging as one of the channels to maximise fan engagement



Beyond the Storefront

Recognising the role sport plays in fostering connectivity, brands are transforming their retail spaces to headquarter local sport communities



Sporting Getaways

Addressing the demand for sport-centric packages, businesses in the travel and hospitality sector are innovating to provide people with a 24/7 fan experience

Diverse by Design

A noticeable shift in the sports industry is being driven by sports brands themselves. To shed outdated traditionalism, brands are adopting new identities that promote inclusivity and accessibility.

UK brand and communications studio Happy Ending Agency worked with BBC Creative to revamp the broadcaster's cricket coverage to attract younger fans, using bold motion design and vibrant colours to break away from cricket's stuffy, male-dominated image. The result made its debut during the Ashes series in June 2023, infusing the sport with cheerful animation.

Sports have often been associated with perfectionism and winning, creating a barrier for newcomers. French sports company Decathlon aimed to change this by collaborating with brand consultancy Wolff Olins on a two-year transformation. Its new positioning, Make Sport Yours, shifts the focus from elitism to participation and enjoyment.

New York-based Athletics Studio collaborated with female motorsports racer Alba Hurup Larsen, who, at 15, has shattered the glass ceiling for women in motorsport. With the aim of inspiring other women to find motorsport enticing, it created a fresh, fun and slightly feminine visual identity – with winged eyeliner-clad eyes batting from beneath a yellow racer helmet. This coincides with makeup behemoth Charlotte Tilbury announcing in February 2024 that it will become the first beauty brand (and first female-founded brand) to sponsor the F1 Academy (source: **Charlotte Tilbury**).

Where brands and organisations won't make changes, athletes are stepping in. From American sprinter Sha'Carri Richardson's bright red fishnets on-track to Lewis Hamilton breaking Fédération Internationale de l'Automobile (FIA) code by wearing jewellery, athletes are infusing their identity into a wider variety of sports, giving them a long-overdue makeover.





Above and left: Athletics identity for Alba Racing, US

'Borrowing, stealing and leaning into entertainment and bringing that into sports to make it not just accessible, but just really exciting'

Stuart Watson, co-founder, Nomad Studio



‘If you only portray emotions that are always around success, grit and glory, that doesn’t feel there is place for enjoyment’

Jocelyn Turlan, senior strategy director, Wolff Olins

Sports Rebranded
Wolff Olins was tasked to shift the focus from elitism to participation and enjoyment for Decathlon’s new identity positioned as ‘Make Sport Yours’, France



Adidas Originals and Wales Bonner spring/summer 2024, Germany
right: LVMH for Paris 2024 Olympic and Paralympic Games, France

‘Where once you would turn to Lewis Hamilton in F1, now there’s a whole roster of F1 drivers in the fashion space’

Madeleine Schulz, reporter, Vogue Business

Haute Athletics

From Hermès to Rick Owens, 44 fashion houses seated athletes in the front row to preview their spring/summer 2024 collections (source: **Vogue Business**). As fashion vies for maximum attention, athletes, with their enormous global influence, have become a new touchpoint for brands to connect with audiences.

Italian tennis prodigy Jannik Sinner upended Wimbledon’s all-white dress code with his Gucci-embossed bag, while WNBA superstar Caitlin Clark turned heads in an all-Prada outfit at the drafts. The relationship between sports and fashion is growing stronger. It’s not just individual players either; Prada partnered with China’s women’s football team in July 2023, and LVMH placed a solid bet on sportonomics by sponsoring the entire Paris Olympic Games 2024.

‘You’ve always had fashionable athletes in this space, but the sheer number of players brands are attaching to today is entirely different,’ Madeleine Schulz, US reporter for Vogue Business, tells The Future Laboratory.

‘Where once you would turn to Lewis Hamilton in F1, now there’s a whole roster of F1 drivers in the fashion space.’

Why is this? Tapping into athletes is proving a successful strategy for brands to reach new audiences and establish themselves in new markets. Athletes are disciplined, diligent and daring – values that resonate with younger audiences, especially those fatigued by influencers and Hollywood’s ‘nepo babies’.



What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025. Insights help brands and businesses to understand and identify the opportunities presented by this trend

Game, Set, Sports!

Building sports fandom is challenging when most young audiences show little interest in watching sports: a **2023 UK YouGov report** revealed that only 31% of engaged fans aged 18–24 watch sports live on television. One of the fastest-growing channels for sports engagement is gaming.

'You're not going to get young audiences to try new platforms they're unfamiliar with, so it's better to work with platforms like Roblox, Fortnite and Minecraft where they're already spending their time,' Thommy Bouman, marketing and business development manager at Beyond Sports, a fan engagement software company, tells The Future Laboratory.

This is why sports leagues are racing to launch original partnerships on gaming platforms. In November 2023, the National Basketball Association (NBA) in the US partnered with game developer Saber to create NBA Playgrounds on Roblox, an arcade-style basketball game inspired by real public courts.

Similarly, in the UK, Wimbledon launched Race to Wimbledon on Fortnite ahead of its 2023 tournament, where gamers had to run to Centre Court overcoming obstacles and London's biggest landmarks (source: **Campaign**).

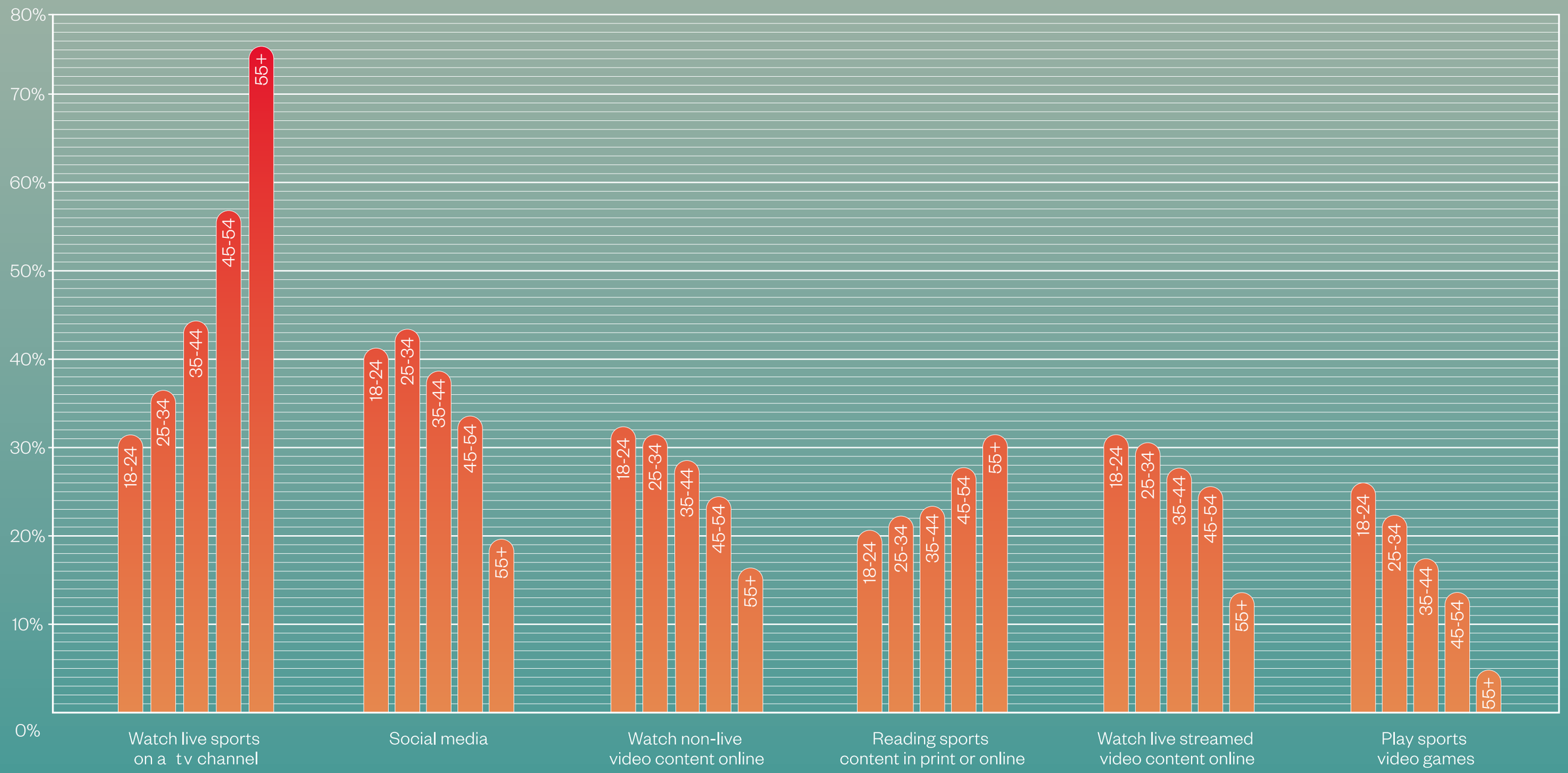
In February 2024, North America's National Hockey League (NHL) became the first professional sports league to render an entire game in 3D on Roblox, expanding opportunities for young people to engage with the sport.

The opportunity for sports leagues and teams to follow the NHL's example is clear; expanding licensing will allow audiences not only to watch games on these platforms, but also to co-create content.

'The industry needs to liberalise media rights because Gen Z and Gen Alpha want to create their own memes and highlights content,' Tian Pei, former head of sports for Roblox, tells The Future Laboratory. 'Sports organisations need to consider how to attract young audiences so they want to tell the stories of sports themselves.'

Race to Wimbledon on Fortnite, UK

How people engage with the sports they regularly follow



*Data source: **The Global Sports Media Landscape Report**, YouGov, UK*

Beyond the Storefront

As outlined in our Mass Movement microtrend, people quickly abandoned their pandemic-induced homebody lifestyles once restrictions were lifted. They channelled their new-found energy into active hobbies with a hyper-local focus, connecting with nearby communities and forging new friendships. Building on this, brands are now transforming their retail spaces into headquarters for these communities to act as a conduit through which consumers can connect with each other rather than just with products or services.

Hiking brand turned streetwear icon Arc'teryx opened its largest European store in London's Covent Garden in March 2024. A key feature is its community hub, which screens films, recommends books and literature, and provides local trail maps.

Similarly, the quintessential Los Angeles sports apparel retailer Alo Yoga is expanding its global presence with a second UK store set to open at the end of 2024. Known more for its wellness studios than its retail offerings, Alo Yoga hosts in-person events, yoga and Pilates classes, and workshops by celebrity instructors and influencers. Altogether, it reinforces its 'wellness is a lifestyle' ethos.

This approach mirrors that of British fitness apparel retailer Gymshark, whose community-driven strategy includes hosting weekly running clubs, providing in-store personal trainers and referring to its community as the 'Fam' (family).





Above and left: Jordan Brand set up District 23, a six-week programme during the Paris 2024 Olympic Games to engage local youth in basketball, France

'The post-run is where people really connect, because movement and exercise can really open you up, mentally and emotionally'

Matt Horrocks, co-owner and managing director, Knees Up

Summer of Sport
Selfridges' officiated the 2024 summer of sport with the launch of its Sportopia pop-up featuring a climbing wall in collaboration with Gorp Girls, UK



Hôtel de Crillon unveiled The Skateroom exhibition ahead of the Paris 2024 Olympics to celebrate the artistry of skateboarding, France

The global sports hospitality market was valued at **£3.7bn** in 2020 and is expected to expand at a CAGR of **23%** to reach a market value of **£15.8bn** in 2027

Source: ***Research and Markets***

Sporting Getaways

As illustrated in our Sports Tourism Market analysis, there is a growing demand for sports-centric holidays that offer entertainment, wellness or luxury experiences – or often a combination of all three. According to the **UNWTO**, the sports tourism market accounts for about 10% of global tourism expenditure and is expected to grow by 17.5% between 2023 and 2030.

Recognising the need to integrate sports fandom into hospitality packages, businesses in this sector are innovating to provide consumers with a 24/7 fan experience. Ahead of the FIFA World Cup 2026, the InterContinental Washington DC has teamed up with DC United, the local Major League Soccer team, to create a package that includes premium suite accommodation, VIP tickets and exclusive meet-and-greet opportunities with the players.

For Formula 1's first Las Vegas edition in November 2023, fans could purchase Resorts World's 888 Experience. This £693,825 ($888,000, €821,130) package included a stay at Crockfords' Palace Suite with a private butler, paddock club and grandstand tickets, first-class air transport, customised tailoring and styling services – plus VIP experiences at nightclubs. Nearby, Las Vegas' infamous Caesars Palace offered the Nobu Sky Village package for a modest £3.9m ($5m, €4.6m), which included a private culinary experience for 12 with celebrity chef Nobu Matsuhisa.

Fans travelling for a sporting event want their excitement and passion to be reflected in every experience they engage with. Here, personalisation offers brands the opportunity to enhance their offerings, from celebrating team wins to creating unique VIP experiences.

Foresight

To boost future engagement, brands must transform fans into 24/7 enthusiasts using technology, loyalty programmes and by showing Gen Alpha that sports are fun.



Digital Loyalty

Blockchain and other digital platforms can offer a solution to fans' growing stakeholder mindset, offering possibilities to monetise their loyalty



The Future of Stadiums

The experience of watching a sport live cannot be replaced, but with the help of new technologies like AR and VR, it can be enhanced



Alpha Fans

In order to fuel sport fandom with Gen Alpha, brands will need to connect with them through their passions and on their favoured platforms



Civic Fandom

If brand can successfully convert audiences into 24/7 fans, it won't be long before fans start seeking a higher purpose from the sport, brand and themselves

Digital Loyalty

The future of fandom lies in transforming casual supporters into full-time fans. This involves closing the gap between fans and their favourite sports, enabling monetisation of their connection and giving fans a real stake in the game. Today, even super-fans don't have a say in the operations of their favourite teams. This model will falter if sports organisations fail to embrace fans' new-found stakeholder mindset.

Polish-Estonian start-up Zetly is leading the way. Using blockchain, it has created a digital platform that maximises fan experiences. This multipurpose platform allows fans to create digital wallets to buy, sell and trade tokens and memorabilia – including content they've shot at live games.

Furthermore, sports clubs can allocate tokens to super-fans for voting, buying merchandise or accessing VIP content, making fans feel part of a virtual boardroom. Fans can vote on jersey styles, stadium music, ESG commitments and more.

In the near future, fans could go one step further and become actual investors. Through blockchain, they could directly invest in smaller teams and emerging athletes, potentially profiting from their success while building life-long loyalty.

Sorare is a fantasy sports gaming experience and marketplace where fans can collect, trade and compete with digital player cards, France

What is Foresight?

Foresights examine speculative future scenarios five to 10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments.

The Future of Stadiums

‘Fans expect more from stadiums than just a game; they want seamless connectivity and immersive tech to deepen their connection with sports,’ Shireen Hamdan, senior principal at Populous Architects, tells The Future Laboratory.

Populous’ designs for the new Prince Mohammed Bin Salman Stadium in Saudi Arabia’s sports city Qiddiya show what future stadiums will offer. The integrated venue, featuring a retractable roof, pitch and LED wall, can transform in hours, accommodating boxing, football, esports, concerts and theatre performances. Fans will have instant access to live data and can virtually interact with celebrities through hologram technology.

In future, the stadium experience will be gamified with omniscreen viewing. Fans can already scan a QR code for real-time analytics, add virtual effects to the game via AR and join the shared-reality experience with fans across the globe through an 87-feet diameter LED dome, developed by Los Angeles-based immersive entertainment and tech company Cosm. These mixed-reality experiences will enhance the fan experience by creating hyper-personalised yet community-immersed experiences.





Above and left: HOK has designed a retrofitted stadium for the NFL’s Jacksonville Jaguars, US

‘Stadiums are sometimes referred to as modern-day cathedrals, but I like to think of them as town halls – civic buildings that can spark widespread regeneration’

Shireen Hamdan, senior principal, Populous Architects



Transformative Stadiums
Populous' malleable design for the Prince Mohammed Bin Salman Stadium can be transformed in hours with its retractable roof and LED walls, Saudi Arabia

‘Kids don’t want to trust the government, they don’t like it. But if Arsenal FC tells them to go to a beach clean-up, you’ll see them running – it’s a whole new belief system’

Lauren Scott-Harris, founder, Earnt





Left and above: Nike Air Max 270 Go, US

Alpha Fans

One of the key challenges the industry needs to tackle is how it will engage Gen Alpha, the generation born between 2013 and 2025. As revealed in our Gen Alpha **report**, for this tech-native generation, traditional streaming platforms, live television and even social media platforms from the 2010s feel outdated to them. Simply trying to get them to watch a sport won’t suffice; in order to fuel their fandom, brands will need to connect with them through their passions and on their favoured platforms.

Dutch software company Beyond Sports has developed a technology that allows real-time sports data to be translated into a 3D environment. Since the development of its first animated character, the team has collaborated with Nickelodeon, Disney and others to create real-time games and highlights with loved characters from entertainment franchises including Teenage Mutant Ninja Turtles and Toy Story.

‘It’s not just about watching the game, it’s about creating an end-to-end virtual environment with storytelling – almost like a movie,’ Thommy Bouman, marketing and business development manager at Beyond Sports, reveals. When translated on Roblox, Beyond Sports also found that kids were creating their own highlight reel and exporting it to TikTok. ‘The engagement opportunities are endless,’ adds Bouman.



Jordan Brand revealed its France Basketball National Team collection which aims to unite athletes and fans from all backgrounds, France

Civic Fandom

If brands can successfully convert audiences into 24/7 fans, it won't be long before fans start seeking a higher purpose from the sport, the brand and themselves. Future-thinking brands will integrate benevolent responsibilities into the fan experience, finding innovative ways to reward the civic fan.

UK-based organisation Earnt incentivises people to volunteer by rewarding them with exclusive access and VIP treatments from brands, restaurants and performers. 'When people are a fan of something, they love it deeply,' Earnt founder Lauren Scott-Harris tells The Future Laboratory. 'I remember thinking, what happens if we harness that into social good?'

When Earnt teamed up with London's iconic Michelin-starred restaurant River Café in 2023 to organise a Thames river clean-up in exchange for VIP booking access, one thousand people signed up. Imagine the impact if sports teams and athletes rewarded super-volunteers with super-fan experiences?

Tiered Fandom

Fans are differentiated by their knowledge and participation; be sure to address each distinct group in relevant ways.

SUPER-FAN

- Super-fans pride themselves on their deep knowledge of the sport
- They have a strong stakeholder mindset and seek maximum involvement with their team or sport
- Often, they create their own fan content on platforms like YouTube and TikTok, and may even have their own fanbase

LOYAL FAN

- Loyal fans are willing to invest significant time and money to stay connected to their team or sport
- They seek hyper-personalised fan experiences
- They desire recognition for both their emotional and financial contributions to their chosen team, athletes and sport

HYPE FAN

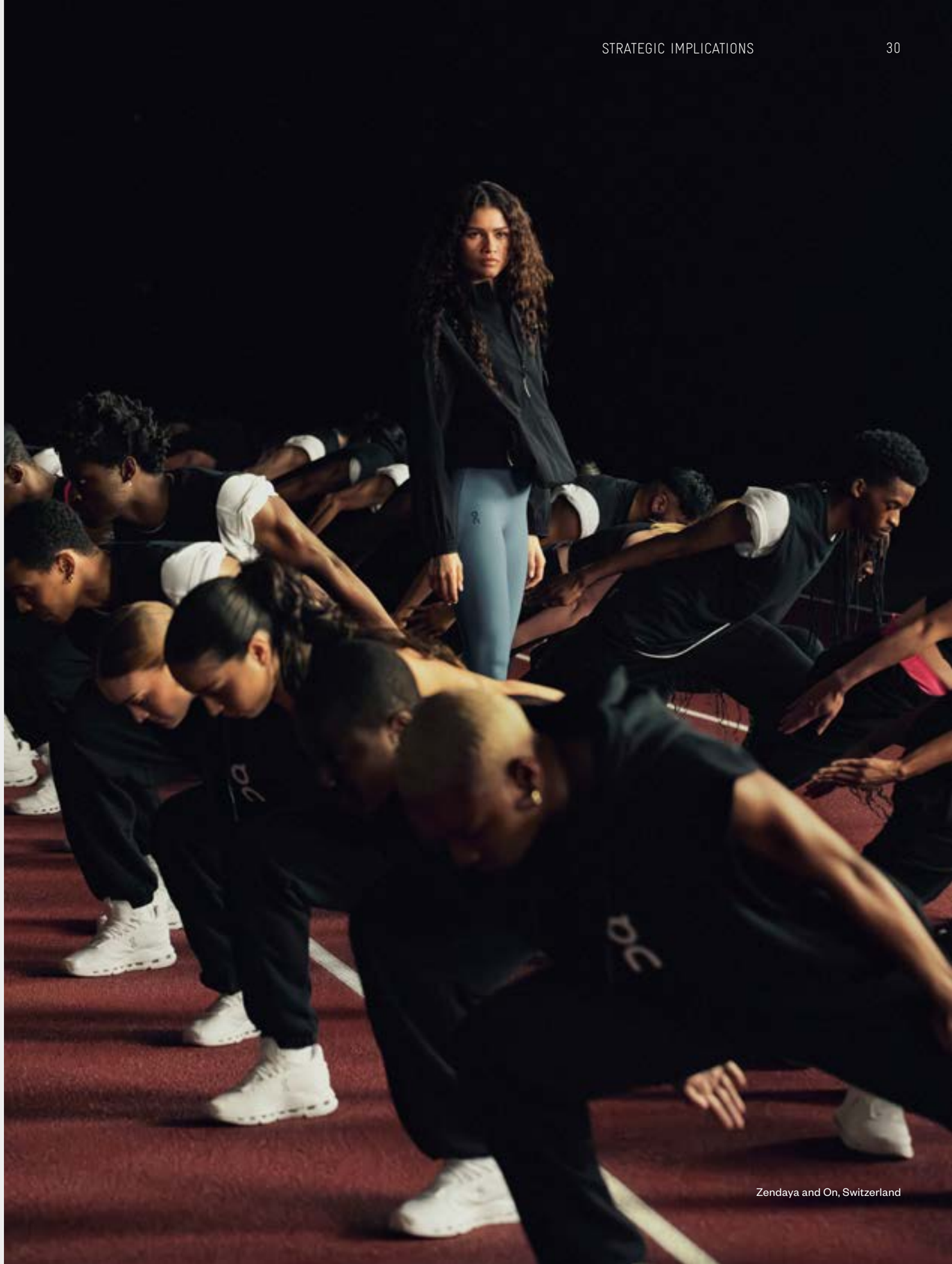
- Hype fans are new converts, often drawn in by tv shows or gaming
- They're eager to get more involved in the sport but aren't ready to make large financial commitments yet
- They are likely to buy tickets and branded merchandise, making them effective word-of-mouth promoters

QUIET FAN

- Quiet fans consume sports content passively, often through following athletes' partners on TikTok or being fans off fashion labels collaborating with sportpersonalities
- These fans represent an untapped market, ripe for conversion
- Brands should make a concerted effort to engage them through non-sporting activities

Strategic Implications

The sport sector faces a crucial challenge: how to cultivate the next generation of 24/7 fans. This raises an essential question: how can businesses foster early fandom and ensure it evolves alongside their audience? The answer may lie in strategic investments in education and culture, providing the foundation for a deeply-rooted and enduring fanbase



Zendaya and On, Switzerland

Strategic Actions

Build bridges, not barriers

As new cultural touchpoints bring in fans without prior sports knowledge, it is crucial to develop strategies that not only welcome them, but celebrate their newness and enthusiasm.



Art of Victory by Nike at Centre Pompidou, France

Craft personalised communities

Even if consumers are getting involved in sports to reap the benefits of having a community, they will still value hyper-personalisation. Utilise AI technology to monitor their individual fan journey, rewarding them along they way



Sorare, France

Loosen the licensing purse strings

Cross-sector and cross-platform collaboration has proven to attract new audiences. To succeed on new platforms, relax your licensing rules so your content can be seen, shared and even co-created.



Puma and the Land of Games on Roblox, Germany

Thought-starters

COMMUNITY

The quickest way to create a sports fan? Have them play the sport. Develop strategies to engage communities that have typically been left out of the sports equation. Can you offer sponsorship, mentorship or visibility?



Nike Victory Mode, France

EDUCATION

Can you inspire the next generation by showcasing the diverse educational paths within sports? Beyond being athletes, children can pursue careers as mechanics, data analysts or physiotherapists – broadening the sport ecosystem and fostering a lifelong passion for sports



Bot Initiated Longevity Lab by Nike NXT, US

BUSINESS

As new sporting hotspots emerge in the East, revaluate your brand to ensure it is being culturally nuanced and respectful. Are you taking note of local customs, religions and traditions? Can you be more hyper-local?



Rapha Women's Spring/Summer 2024 collection, UK

Related Macrotrends

2020

Pleasure Revolution

The post-pandemic consumer continues to prioritise wellbeing by indulging in leisure activities – shifting focus away from relentless productivity and instead finding joy through entertainment



Off Hours, US

2021

Elastic Brands

Businesses must showcase quick reflexes and adaptability to remain afloat in the current economic and sociopolitical climate. It's time to collaborate with – not against – the other players



Puff by Borja Alegre, Spain

2022

Meta-tainment Futures

As consumers divide their time between physical and digital worlds, businesses need to implement effective strategies to capture their attention between realms



The Ice Runner NFT by Myami, US

2022

Neo-collectivism

United by values of empathy and community that are inherently present in sports, consumers are shunning individualism in favour of alliances that will foster friendship and camaraderies



Adidas and Zalando, Germany

Strategic Worksheet

This strategic worksheet is to help you apply a macrotrend to your business.



Rapha and Shrimps, UK

Prioritisation

Consider the following:

Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity | Identity | Purpose | Security | Fulfilment

Which driver will have the most impact on your brand/business?

Micro-globalisation | Fragmenting Societies | Accelerating Technologies | Evolving Demographics | Climate Change & Resource Scarcity | Urbanising World



Influence

Consider the following:

How will this trend affect how you fulfil that need?

What impact could these drivers have on the business?

Select two insights that feel most relevant to your brand/business:

How do these insights align with your brand's trajectory?

How could you apply these insights to your business?

Which foresight scenario is your company least prepared for?

What is most surprising about this foresight scenario?



Consider how this macrotrend could impact the following pillars of your brand:





01 Culture

What cultural conversations are emerging and who are the tastemakers?

How do we add-value to culture?

What will our consumers pay more for in the future?

02 Category

What's our greatest opportunity?

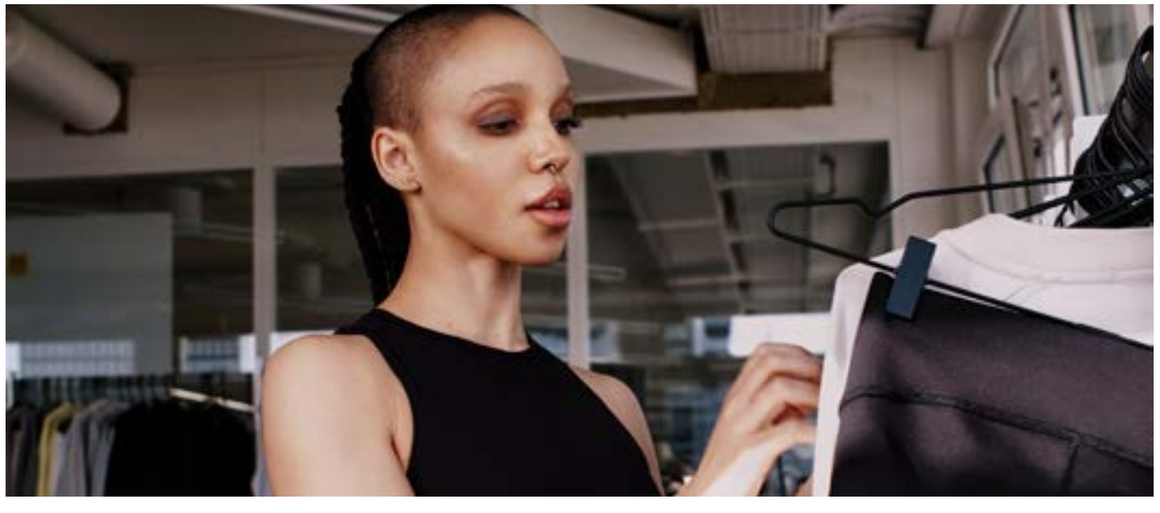
How is the competition evolving?

How can we differentiate?

Clockwise from left to right: Run in the Louvre, France; THE SKATEROOM at Hôtel de Crillon, France

Consider how this macrotrend could impact the following pillars of your brand:





03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?

04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

Clockwise from left to right: Rapha Women's Spring Summer 2024 collection, UK; On and FKA twigs Switzerland

Planning

YEAR 1

Over the next 12 months, how will this macrotrend affect your team?

YEAR 2

In three years, how will this macrotrend change the brand?

YEAR 3

In five years, how will this macrotrend change the business?

Methodology

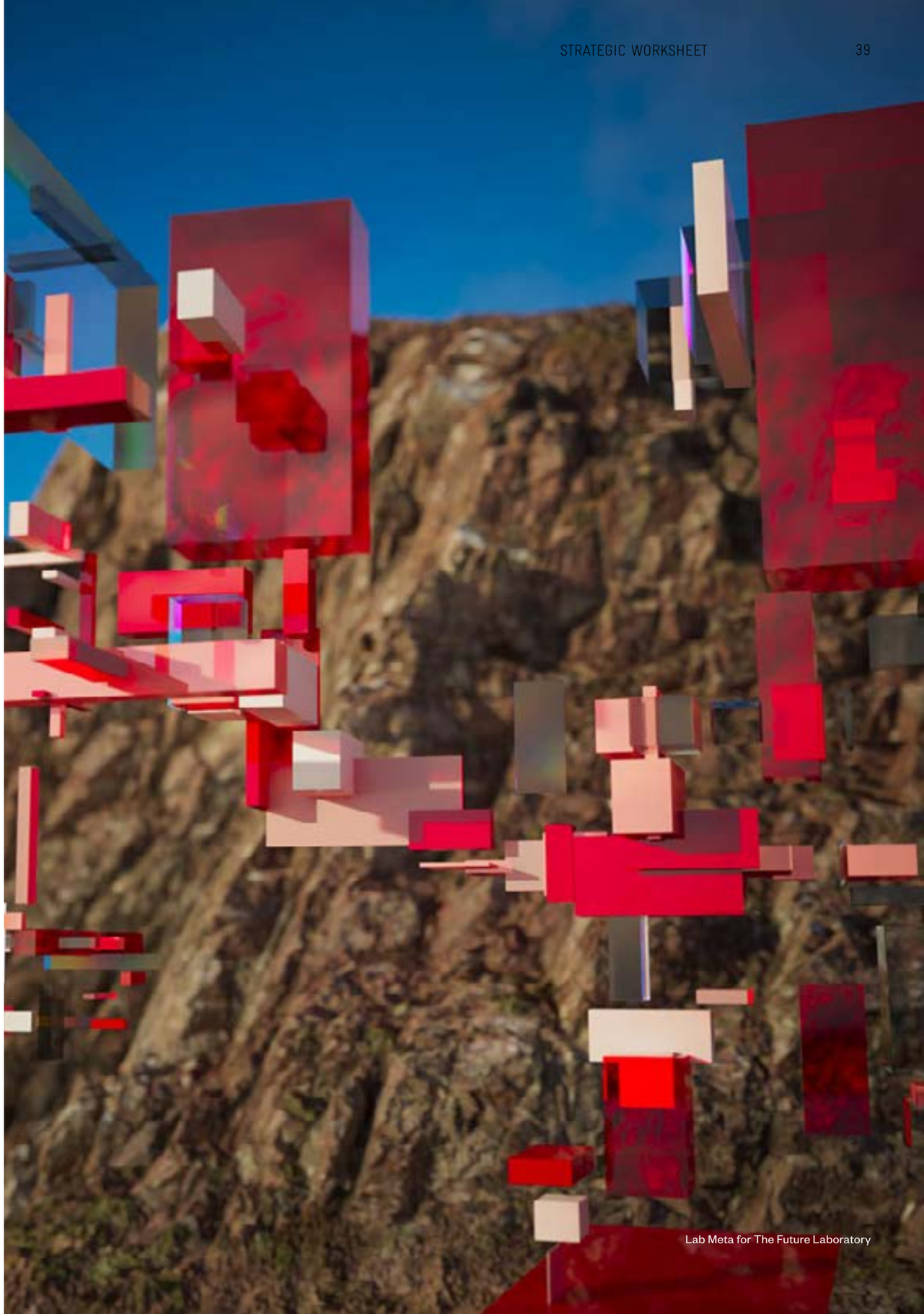
Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

However, our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is provable, practical and minimises uncertainty.

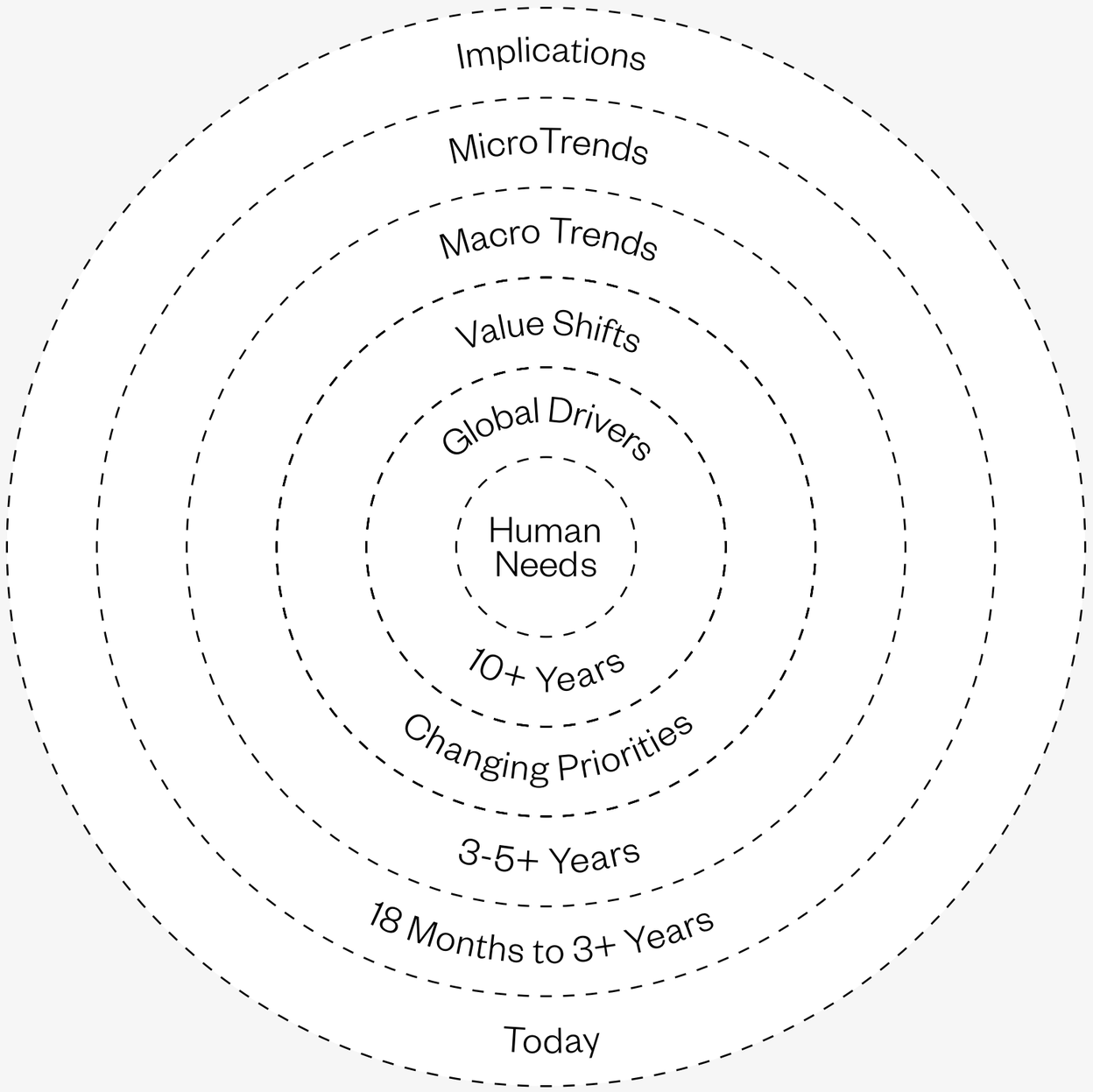
We do this by understanding the influence of six global drivers causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging macrotrends and microtrends, and ascertain what their implications are for the future landscape.



Lab Meta for The Future Laboratory



The Future Laboratory's proprietary foresight methodology

Methodology: Foresight Process

At the heart of The Future Laboratory is a unique proprietary methodology that allows us to determine, define and track the key drivers of change affecting the future. We do this by tracking:

Human Needs : Universal

The foundation of our society based on a value system that supports human nature's physical and emotional programming.

Global Drivers : 10-year+ Horizon

Key global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in.

Value Shifts : Ever-evolving

The new ways in which we strive to meet these human needs, shaped by our contemporary context.

Macrotrends : 3–5 years+ Cultural and Societal Shifts

The cultural manifestations of new and emerging attitudes worldwide as shown by the behaviours of innovators and early adopters.

Microtrends : 1–3 years+ Lifestyle

Specific and tangible business innovations already emerging across key lifestyle categories.

This report is based on the sector research from The Future Laboratory's trends intelligence platform, **LS:N Global**

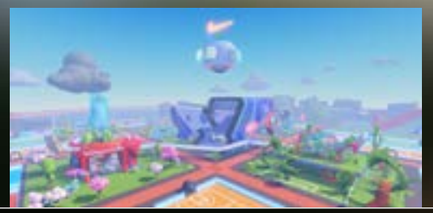
Read our latest articles and sector reports:



Sports Rebranded

Sporting bodies and brands are cementing appeal among Gen Z with rebranding campaigns that celebrate inclusivity and the joy of participation.

Rapha and Shrimps, UK



Digital Fandom Market

Fandom in the digital age is booming, with live-streaming, tokenisation and neopatronage changing how we think about and interact with the creators we love.

Nikeland on Roblox, US



Mass Movement

In-person gatherings are increasing at an unprecedented scale, serving a visceral need for vitality and human connection among young adults.

Adidas Ultraboost 5, Germany

We can also deliver our macrotrends to your business in a number of ways, from on-demand video presentations to strategic workshops and bespoke reports.

If you want to find out more, say

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The Future Laboratory is one of the world's foremost strategic foresight consultancies. Members of our trends intelligence service LS:N Global get exclusive access to the mindsets defining tomorrow and the early adopters driving global change across ten industry sectors.

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