

BBDO KNOWS

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Sports, Fans & Brands

The Sports industry is vast, lucrative and loved. At the start of the pandemic, sport was quickly put on pause; huge live and international audiences made the sport industry especially vulnerable to restrictions. Events were cancelled, shown virtually, or most notably, like the Tokyo 2020 Olympic games, postponed. Fans grieved and adapted – taking to social media to voice how much they missed sport. 35% of Gen Y and Z males globally say watching live sport with friends and family was what they missed most during the pandemic – more than feeling safe to go outside or general social interaction with friends or family.¹

Clearly, sport is about much more than games played competitively. WARC writes that sport is “about a lot of other things.... like community and belonging and shared experience. Storytelling and myth-making, even...

... And it's this broader, more all-encompassing kind of sporting event that's going to become more and more important in today's and tomorrow's world.”²

Predictions around sport's heightened importance is due to several factors, among them: greater and more widespread interest in sports and athletes; and increasingly, the political purpose which imbues sports, fans and players. Equally, sports fans are one of the most highly emotionally engaged consumer groups. During the pandemic, fans expected brands to support them; 78% of people on Twitter agreed that brands should try to bring sports fans together while they cannot go to the stadium or watch together as a group in-person.³ Brands like Nike rose to the challenge, with community-led messaging⁴, a rallying competition⁵ and a celebratory retrospective⁶.

Early in the pandemic, communities also came together around sport of their own accord. For example, in the UK, 99-year-old war veteran Tom Moore raised £4m for the NHS by doing laps of his garden.⁷ Tennis player Roger Federer delighted two girls in Italy – and as a result, the world – by surprising them with a game of socially distanced tennis.⁸ Football player Marcus Rashford created a remarkable campaign to end child food poverty.⁹

¹ Sports pro media, [link](#)

² WARC, 'Upping the game (and avoiding an own goal in sports sponsorship)', July 2021

³ Twitter, [link](#)

⁴ Play for the World. [link](#)

⁵ The Living Room Cup. [link](#)

⁶ You can't Stop Us. [link](#)

⁷ BBC, [link](#)

⁸ Today, [link](#)

⁹ Guardian, [link](#)

Sports, Fans & Brands

Instances of individuals using sport to bring people together at a time of crisis were popular and poignant. Fans engaged with sport on an even more emotional basis – as their worlds grew smaller and their passions became greater.

Now, as some markets re-open and restrictions lift, people are eager to celebrate and support their teams. The sports industry is predicted to grow to \$440.77bn in 2021 at a compound annual growth rate of 13.5% - from \$388.28bn in 2020.¹⁰ The industry ecosystem – made up of fans, brands, media, clubs, leagues and players – is a huge business opportunity. Research shows there is +63% engagement on athlete ‘advocacy posts’ generated for brands than on owned social media content.¹¹

Sport is a huge opportunity to connect with consumers – fans – in a highly emotional space. Fans also make up a sizeable portion of the population; globally, one in five (22%) 16-64 year olds see sports teams and players as central to their identity.¹² On this basis, Dr. Daniel Wann, Sports Fan Psychologist says: “If you’re a sports team or an athlete, you want fans to identify with you because that’s where the money is.”

This article explores three recent developments in fandom:

EVERYDAY ATHELETES

During the pandemic, more people worked out than before: 39% of consumers worked out at home during covid-19 vs. 26% went to the gym pre-covid; and +28% of GB consumers and 26% of US consumers said they were doing more exercise because of the outbreak.¹³ Bands, like the exercise bike Peloton benefited, with +197% increase in visits to Peloton’s website in September 2020 YoY.¹⁴

The pandemic also gave fans a greater appreciation of sports. Globally, more than a third (36%) see sport as important to their identity.¹⁵ Meanwhile, 63% of 13-39-year-olds consider themselves a fan and 46% of Snapchatters started watching a new sport during the pandemic – and users watch 28 hours of sport per week.¹⁶ Active fan engagement in sports increased during covid.

¹⁰ Globe News Wire, [link](#)

¹¹ Nielsen, [link](#)

¹² Foresight Factory

¹³ Goodform, 2020, [link](#)

¹⁴ As above

¹⁵ Foresight Factor, 2020, [link](#)

¹⁶ Y pulse, [link](#)

ACTIVIST ATHLETICISM

In recent years, sport has become more political, most notably in relation to athletes taking the knee to support the Black Lives Matter movement. Activism among athletes has become mainstream; 95% of athletes with more +5 million followers on Instagram advocated for causes on social media in 2020, while advocacy collectively generated \$314 million worth of QI* media value.¹⁷ Not only are athletes speaking out, but consumers are listening to them and buying into brands which support them. Consumers are x4.5 more likely to buy from a brand that addresses human rights, and x4 more likely if it speaks out on systemic racism.¹⁸

As well as being strongly supportive of anti-racist messaging and acts, consumers want more brands to close the gender gap in sport. Although women make up 47% of passionate fans across 13 of the world's most popular sports,¹⁹ seven in 10 women think that women's sports do not get enough coverage; AND ½ of men (50%) think the same.²⁰ A big part of the issue is representation, and 47% say they would watch more women's sport if it were readily available.²¹ Megan Parry, Executive Director of Women's initiatives at the Sports Innovation Lab notes: "We know that investing in women's sports isn't just the right thing to do, it's a really savvy business decision...the fluid fan is the path to growth - women's sports fans are the most fluid of all."

REMOTE FANDOM

During the pandemic, fans had to be content with distanced and digital viewership. This accelerated pre-existing digital behaviors. 57% of young UK-based sports fans would prefer to watch goals as they go in on social media rather than through a live broadcast.²² Not only are fans increasingly engaging remotely but they report preferring this; 69% of fans say that the use of emerging technologies has enhanced their viewing experience both inside and outside the stadium.²³

Additionally, while live sport was put on pause during the pandemic, professional gamers playing e-sports flourished - as did their fanbases. E-sports sponsorship revenue growth projection is predicted to go from \$347m pre-covid to \$842m post covid.²⁴

¹⁷ Nielsen, 2021, [link](#)

¹⁸ Edelman, 2021, [link](#)

¹⁹ Gemba Insights [Link](#)

²⁰ Good Form [Link](#)

²¹ As Above

²² Sports pro media, [link](#)

²³ Capgemini, [link](#)

²⁴ Nielsen, 2021 [link](#)

WHAT THIS MEANS

More people than ever consider themselves fans – and sport as crucial to their identity. Fans are also more actively engaged with sport. There is a significant opportunity for brands to be allies, educating their followers and impacting behavioural change. Top priorities need to be, closing the gender gap in sports, and creating safe and inclusive environments for underrepresented sports fans attending live events. Brands can also look to make the most of additional digital touchpoints, as the e-sports industry growth promises to be a lucrative opportunity.

ABOUT BBDO KNOWS

BBDO KNOWS is a planning resource for the BBDO network.

BBDO KNOWS offers thinking, strategy, insights and inspiration on key categories, key themes and consumer segments.

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