

WHAT THE FUTURE: FANDOM

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Why women's sports are the next frontier for brand growth PAGE 13

Why brands should reinvent sponsorships for the digital fandom era PAGE 23

How superfan expectations are reshaping brand-fan relationships PAGE 30

+ Leaders from Verizon, Molson Coors, Twitch, Pinterest, Aspen Institute and Parity, as well as a professional Swiftie share how livestreaming, social media and emerging markets are reshaping fandoms and how brands engage with them

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How the fandom revolution is changing the game for brand growth

Imagine it's 2035.

"Fandom is where I live," said a teenage What the Future reader. That's likely not an exaggeration. Fans binge the shows and books themselves and immerse in the fan fiction and related Discord channels and livestreams. And vice versa. Interacting with fan content can drive people to become fans of the original content. All of this can be a massive time suck.

It's also big business, and one that is increasingly digital as fans engage virtually across platforms, which you'll see in this issue.

Think about just some of the industries people are fans of: movies, music, sports, books and the individual entertainers, athletes and authors involved. Through creators and influencers, even fans have fans. Fandom has, for some, gone pro.

In the [What the Future: Identity](#) issue, cultural preferences (i.e., things we are fans of) were among the most important components of how people think about themselves after aspects of their physical selves and their lived experiences. In this issue, we explore the topic in much more depth.

Fan, remember, is short for fanatic

And who's more fanatic than the youth? Younger Americans (under age 34) are twice as likely to say they are fans of specific brands and specific athletes than older Americans (ages 55+). They're four to five times as likely to be fans of celebrities and influencers (often used to deliver brand messages and endorsements) and four times as likely to be fans of video games, a channel to reach young people on.

All of this is good news for brands, because younger consumers are notoriously hard to reach and younger fans are more than twice as likely to say they are more likely to buy products or services from sponsors of things they are fans of.

Fandom offers a powerful way in. You don't even have to work with the object of the audience's fandom. Who hasn't had a conversation about whether a band sold out? Fandom gives brands a way to do an end run around that problem. Band won't take your money? Fine, support the fandom directly or its fan influencers.

A man with a beard, wearing a white t-shirt with a 'COMIC CON' logo, is sitting in a room filled with shelves of collectibles. He is holding a glowing lightsaber in his right hand. The room is dimly lit, with the lightsaber providing a bright light source. The shelves behind him are filled with various action figures, toys, and memorabilia.

92%

of Americans say they are a fan of something.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,112 U.S. adults.)

Fandom is for the youth and that's too bad

People of color are also more likely to put the fanatic in fandom, according to the Future of Fandom survey. One demographic is sitting this out to some degree: older Americans. That's a shame.

Fandom is a gateway to community, something that older Americans are generally seen as lacking. Perhaps that's because so much of fandom (and everything) takes place online and on social media, where older Americans are less comfortable. Whatever your fan jam — maybe you collect records or Hummel figurines or you're a genealogy buff — there are online and offline ways to experience community through fandom.

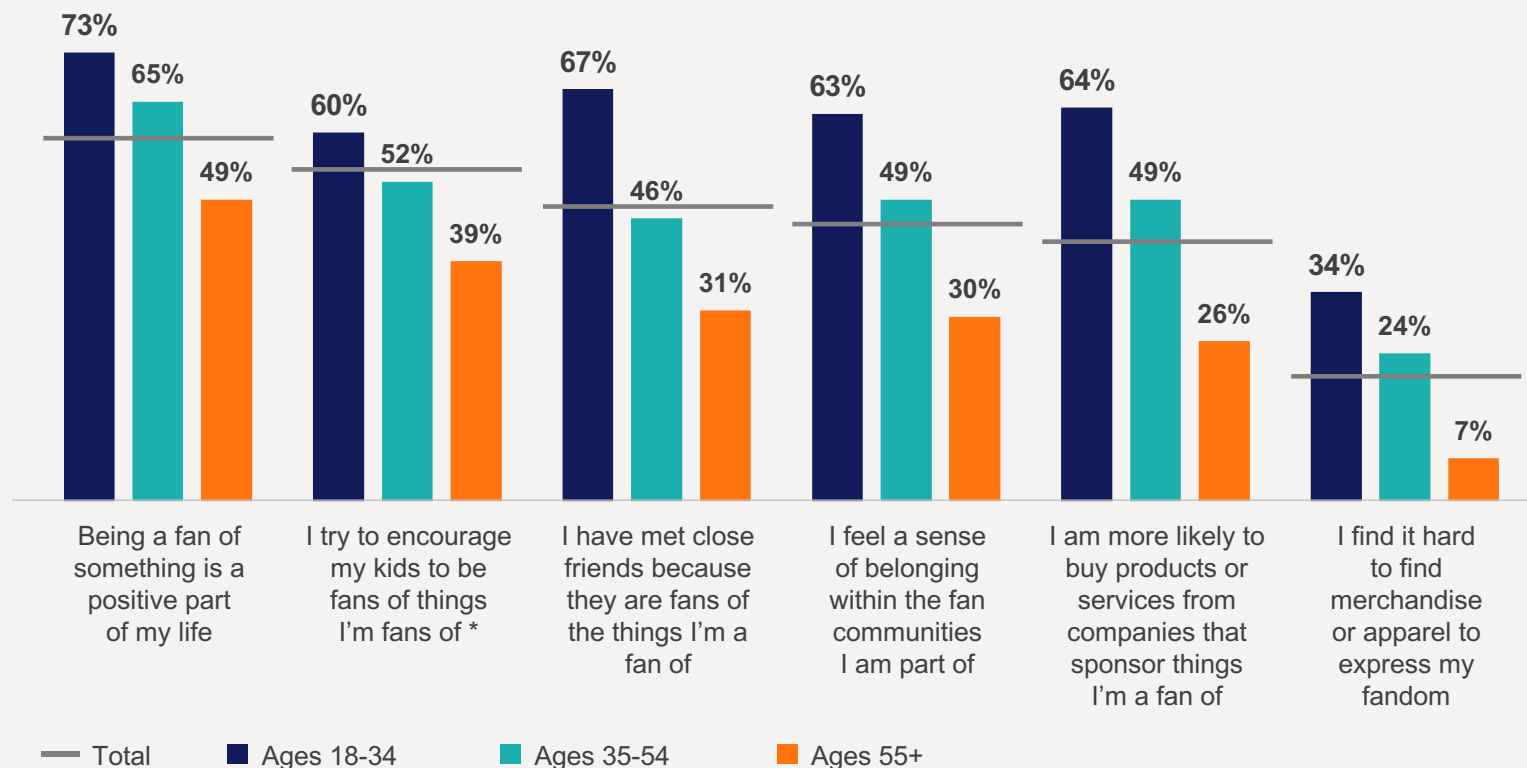
Niche vs. scale in reaching fandoms

For brands, one challenge is appealing to fans at scale. Once you're past the major sports, biggest chart-topping bands and TV shows, fandoms can get niche fast. And deeply intersectional. Are you a fan of beach volleyball and also a goth? Then you're likely a fan of Boise State University's Nora Hayd.

While we're talking about college sports and women, it's worth pausing to talk about the importance of youth sports as a pipeline to fandom.

Younger fans show stronger fan engagement and community connection

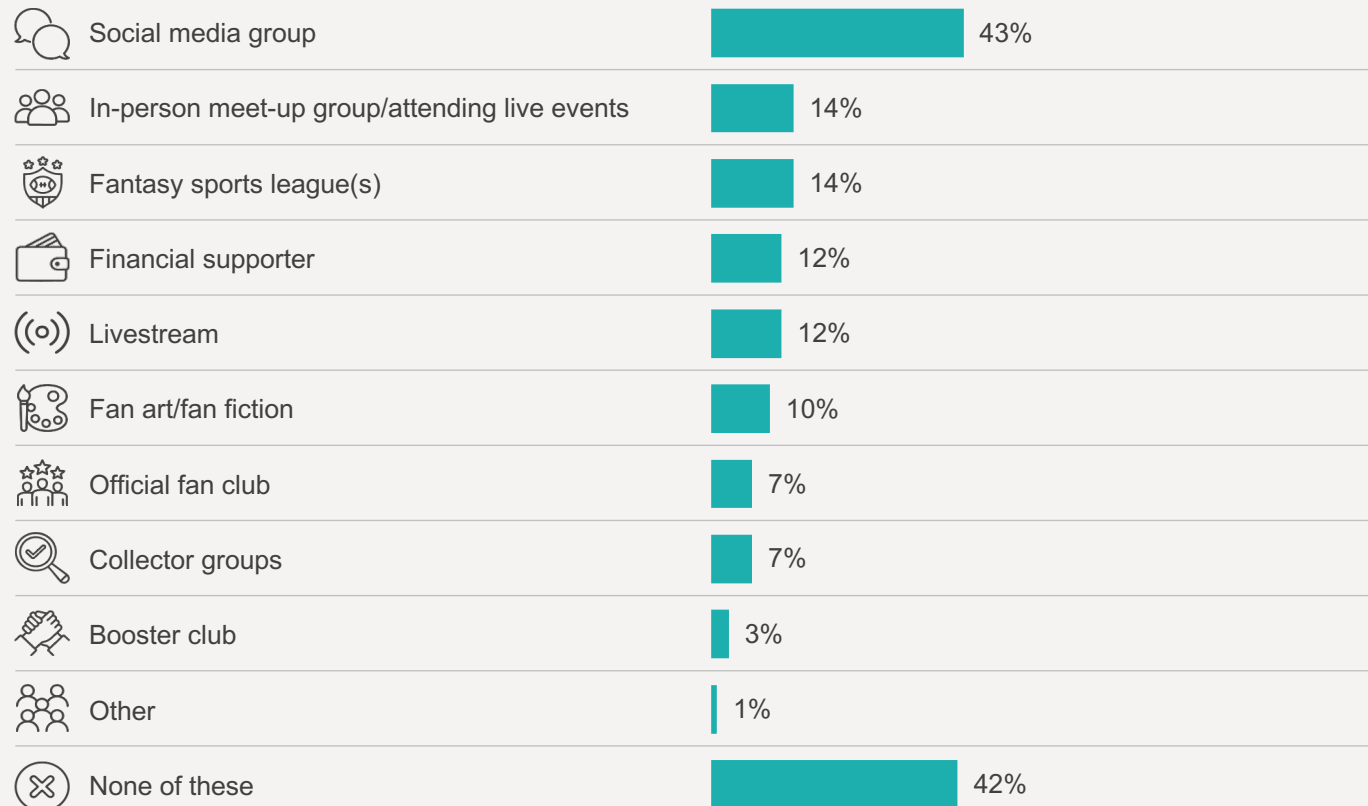
Q. How much do you agree or disagree with the following? (% Agree)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything, including *292 people with a child in the household.)

Most Americans' fan communities are online

Q. Do you belong to any of the following communities related to your fandom(s)? (% Total)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)

By definition, kids who play a sport are generally a fan of that sport. Often, for life.

The issues with the sports fandom pipeline

It's harder and harder to be a youth athlete these days. For one thing, it's gotten super competitive. "The level of programming and activity has gotten more and more sophisticated at the youth level," says Jason Clement, co-founder and CEO at The Sports Facilities Companies, which is exactly what you think it is.

"The philosophies and approach that used to be reserved for the professional or collegiate level has found its way down to the youth level of instruction and the increased level of investment for families. That has expanded exponentially over the last two decades."

That growth shows no sign of letting up. But a parallel phenomenon is the rise of women's and girls' sports and with them, brand tie-ins. One youth softball player and What the Future reader found their favorite player had their own line of batting gloves. They didn't really like the style, but they at least saw that it's now possible for female athletes to have product endorsements like that. That's relatively new and could be a game-changer for fans and brands alike.

One reason tech platforms are so successful is they aggregate niches and help us be fans of each other. And often it's led by those smaller communities bottom-up instead of the behemoths top-down.

So, we've made a case up until this point that brands have a place in fandom. But there's a danger. The people and organizations people are fans of are often ... humans.

The one that (thankfully) got away

The pages of What the Future have often featured interviews with people and brands our writers are fans of. Hopefully you couldn't tell that by reading the interviews, but sometimes our passions likely surface. But there was one interview we tried for repeatedly and never landed. That turned out to be OK, sadly, because the potential interviewee, author Neil Gaiman, has now been accused of all kinds of awful things by a growing number of women.

There are two reasons to bring this up. One is because of the obvious brand risks for being involved with or sponsoring humans. Humans range from imperfect to deeply flawed. You don't always know how these situations will play out.

Two, fandoms are often left doing their unique calculus about how far is too far, and when you stop being a fan of either

the human or their work or their legacy or their team or their sponsors or all of the above.

That leaves us with a whole host of questions and opportunities for brands and companies alike:

- How do you tap into fans authentically, especially the 28% who consider themselves actively engaged in fan communities?
- How do you find the fandoms that will resonate with your current and, even better, your potential customers?
- How can your brand make the experience of being a fan better for those fans, not just for your brand?
- How can you help grow the pipeline of fans for the communities your brand takes part in?
- How can you help diversify and enable access to those communities or maybe create exclusive sub-communities?

We'll get into those topics in this issue with our amazing panel. And if you're a fan of What the Future, smash that like button and subscribe, eh?



Matt Carmichael is editor of *What the Future*.



28%

of Americans consider their engagement with fan communities online as very active to active.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, 1,020 U.S. adults who are a fan of something.)

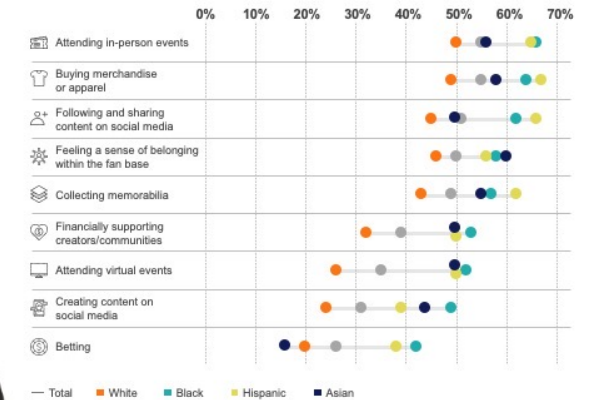
See beyond the horizon

Ipsos What the Future custom webinars give you
personalized insights for your business



Not all people express their fandom the same

Q. How important, if at all, are
the following aspects to you
personally for expressing your
fandom? (% Important)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)

When you imagine possible tomorrows,
you ask better questions today.

BOOK NOW

Shifts: How will fans move from consuming to influencing?



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NOW:

From fan to friend



Fans engage with their passions across various, fragmented platforms, fostering parasocial relationships with entertainers and athletes. This landscape offers content and can create connections where fans feel like they know their favorites despite no true interaction.

NEXT:

From passive viewer to active participant



Fan experiences will be revolutionized by technology advances such as augmented reality. As technological barriers fade, it will become possible to interact with one's favorite sports team, entertainer or fantasy world as though it is one's own life.

FUTURE:

From contributor to collaborator



Biotechnology may blur the lines of identity and authentic experiences by using brain interfaces to connect with fans and shape content in real time. Fans may experience events with personalized narratives shaped by their reactions.

How livestreaming is shifting fan engagement in the attention economy



Rachel Delphin

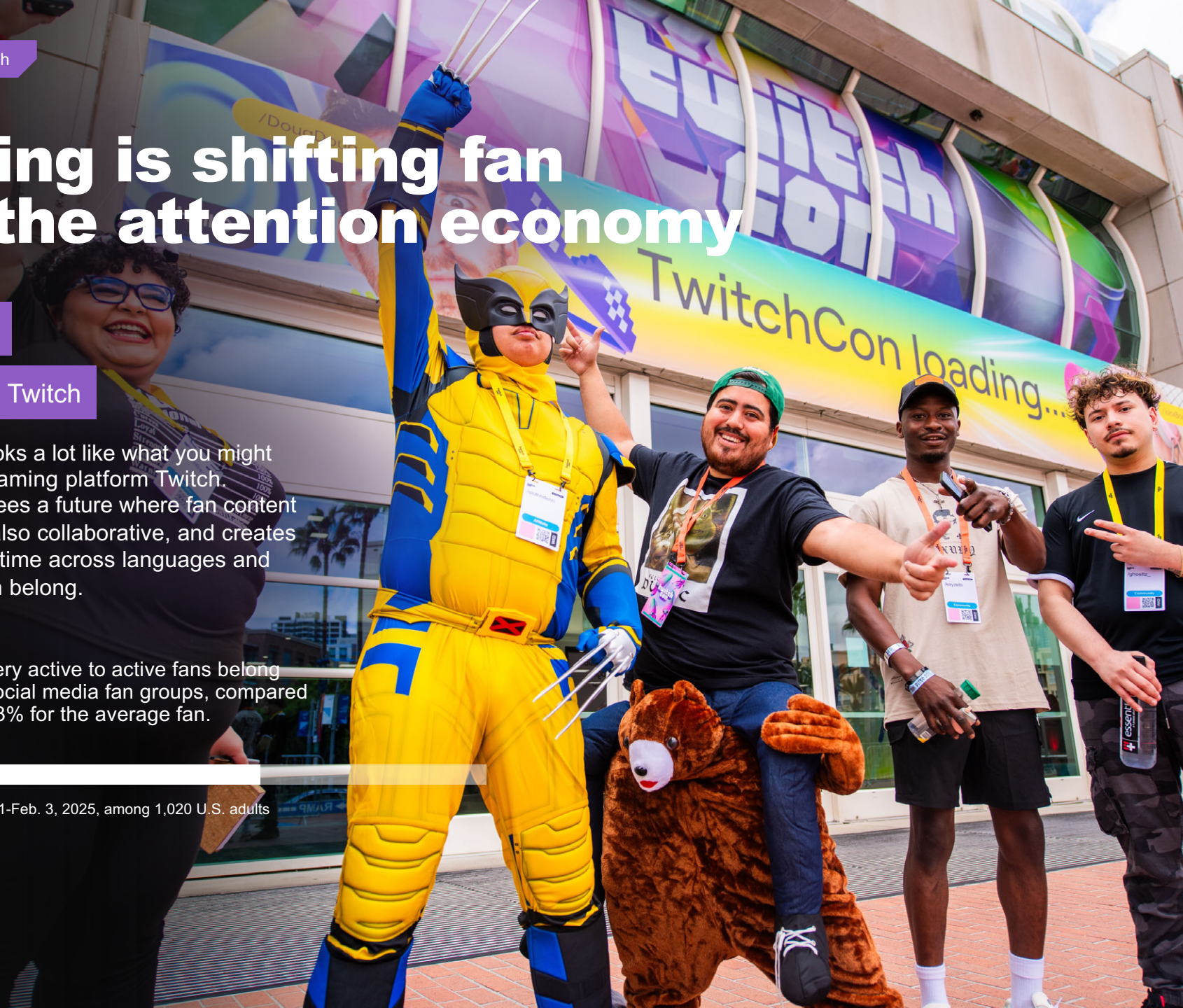
Chief marketing officer, Twitch

The future of fan content looks a lot like what you might already find on the livestreaming platform Twitch. Its CMO, Rachel Delphin, sees a future where fan content is not only interactive, but also collaborative, and creates deeper connections in real-time across languages and cultures, where anyone can belong.

70%

of very active to active fans belong to social media fan groups, compared to 43% for the average fan.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)





What The Future interview with Rachel Delphin

Kate MacArthur: Why has livestreaming become so popular, especially among younger people?

Rachel Delphin: It offers a sense of connection that keeps people engaged. Livestreams are dynamic, unscripted and interactive and that serendipity keeps you tuned in. You're able to interact directly with streamers and other fans in real time, making you an active participant rather than a passive viewer. It's that sense of immediacy and community resonating deeply with people, but certainly with younger audiences.

MacArthur: How has livestreaming changed fans' content consumption habits?

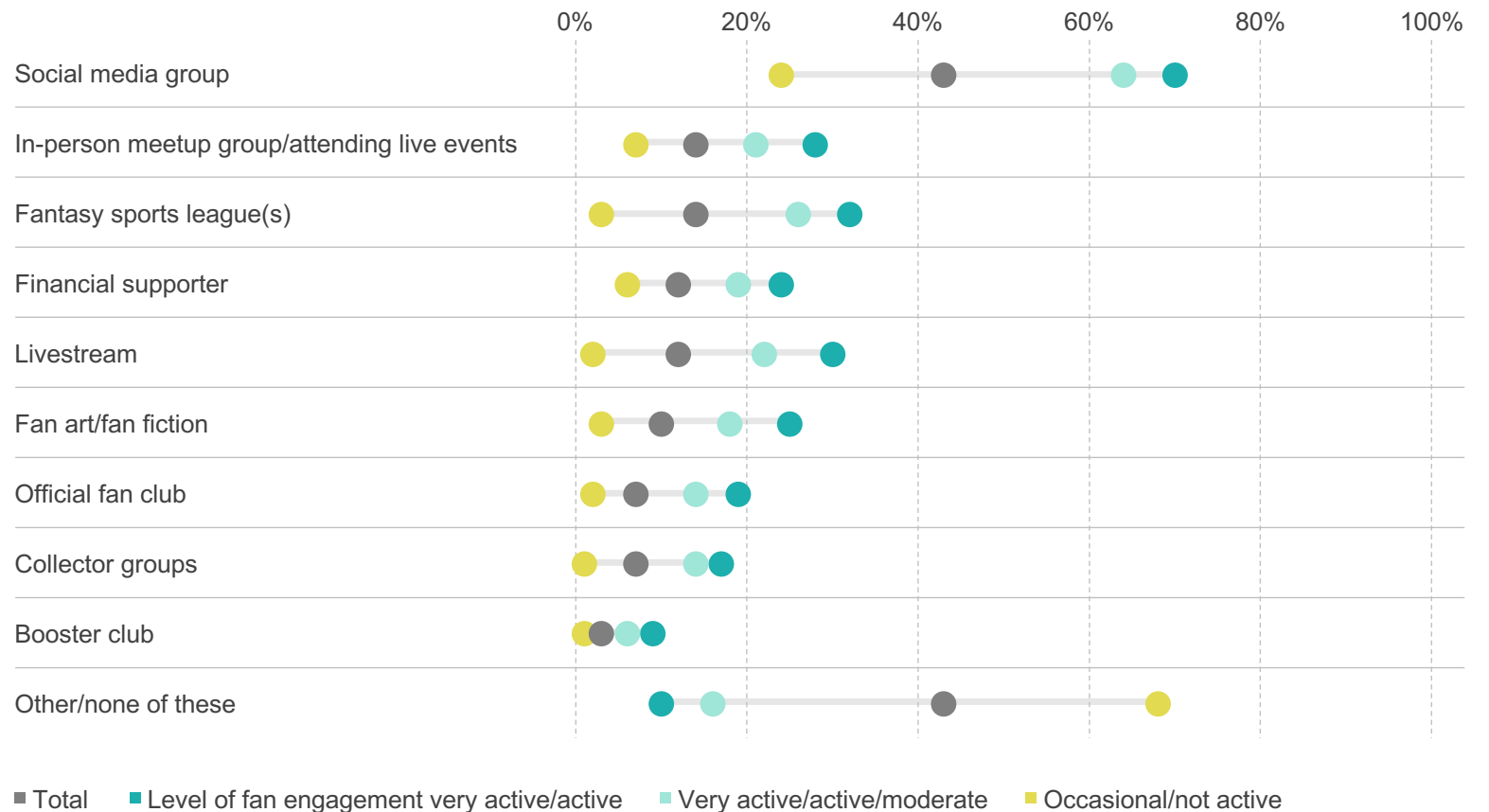
Delphin: There's an expectation that consumption is communal. Livestreaming brings that first- and second-screen experience into a single-screen experience. You can consume, react and influence the action on the screen and interact with the subject. This creates that deeper sense of engagement and personalization.

MacArthur: How is content consumption evolving?

Delphin: It's not pure consumption anymore. It is participation and contribution now. Fans want to understand what's the motivation, the story behind the story, the lore. Showing fandom is a way to confer status. There's been this real embrace of who you are in your deep fandoms.

Beyond social media, the most active fans join fantasy sports and livestream groups

Q. Do you belong to any of the following communities related to your fandom(s)? (% Total)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)

MacArthur: How do events on streaming platforms affect that relationship between fans and creators?

Delphin: Special events tend to bring more people in. But the thing that really strengthens the bonds is repeated time spent over a long period. The typical behavior on Twitch is not endless scrolling. You're here for 30 minutes or a couple hours, several times a week. So you're spending upward of 30 minutes, maybe a couple hours on a single creator's or maybe a couple creators' channels. You have membership in someone's channel and are recognized by other members within the community.

MacArthur: Do you have a favorite example?

Delphin: Twitch Plays Pokémon. It was a collective experiment where over 16 days, about a million people completed Pokémon Red by inputting commands in chat. It became this sensation and a seminal example of the community experience.

MacArthur: How do global fandoms influence content creation and platform development?

Delphin: There's a Twitch streamer who's a big Minecraft personality and his name is Quackity. He started this international game show, and it includes real-time translation. One of the harder things to overcome is language barriers. Being able to do it in real time is really

interesting because then the cultural change becomes immediate. The other way is that being a fan has status. Creating content with depth, leaving something behind where there's a trail where people are looking for the signs and symbols and sleuths to decipher — many superstars like Taylor Swift do this really well. That's the advice for brands: Build the fandom, leave Easter eggs for people to find and follow and dissect.

MacArthur: How does monetization influence both the content and the fan relationships?

Delphin: People pay because they're supporting the stream market, and they want the creator to continue. For the creator, there's income. Having income from either subscriptions or memberships tends to be more predictable. That value exchange is clear, and viewers feel good about being able to support creators.

MacArthur: Do you see a role for AI in influencing all those experiences going forward?

Delphin: There are a lot of tasks that a creator has to do. They are obviously talent, but they're also their own social media managers, editors and assistants. The more we could reduce the other mundane tasks and administivia that creators have to do, that would be great. There's certainly room in an ecosystem for something like that so creators can do what they love.

Kate MacArthur is managing editor of What the Future.



Livestreaming brings that first- and second-screen experience into a single-screen experience. You can consume, react and influence the action on the screen and interact with the subject.”

How fandom mashups can sharpen brands' marketing playbooks

Sneakerheads, K-pop stans and Formula 1 enthusiasts might not have the same obsessions, occasions or slang. But they express themselves in the same place: online. That gives brands an opportunity to learn how these fandoms overlap and align with their business.

Conventional social media monitoring tools sort conversations into keyword-based silos, omitting crucial context. But as the internet boosts cultural cross-pollination, the bigger opportunity is to gain a window on the interactions between fandoms — from gamers that love fashion, to foodies that frequent BookTok — and how those affinities shape their behavior as fans and as consumers.

More sophisticated listening tools can map out that landscape, drawing out cross-category connections that can inspire new products, partnerships or promotions.

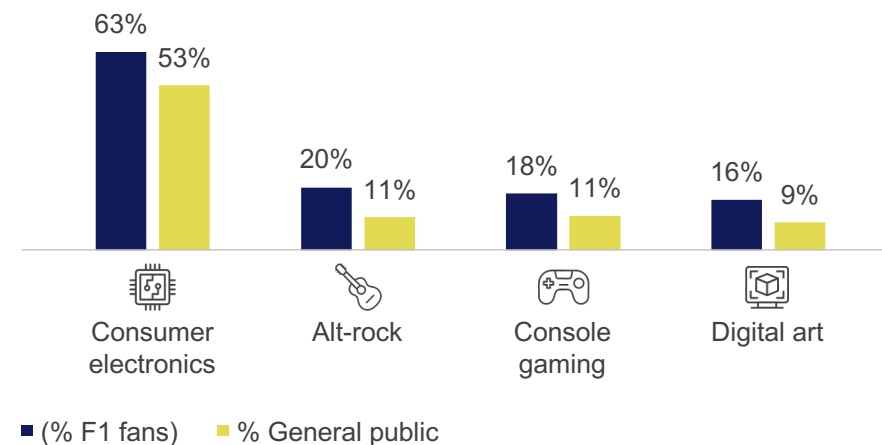
People contain multitudes. To keep up with today's fans and tomorrow's trends, brands need the complete picture.



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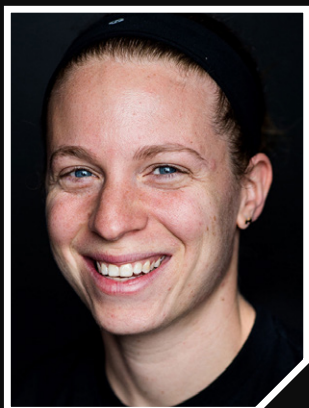
How cross-category fan profiles can reveal opportunities for brand partnerships

U.S. Millennial fans of Formula 1 racing are more likely than the public to share the following interests and communities.



(Source: Ipsos Synthesio Profiler Tool.)

Why women's sports are the next frontier for brand growth



Alana Casner

Senior vice president, athlete relations and business development, Parity

After years of fits and starts, women's professional sports are surging in popularity, viewership, financial backing and cultural significance. While not at parity with men's sports, the gap is closing. The aptly named platform Parity helps connect brands with female athletes in major leagues like WNBA basketball and niche sports like softball and lacrosse. When Parity's Alana Casner thinks about the future, she imagines a growing ecosystem of fans, media coverage and beneficial brand relations, all of which elevate the fandoms.

47%

of both U.S. men and women agree that women's sports are as exciting to watch as men's sports.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)



What The Future interview with Alana Casner

Matt Carmichael: Are we finally there with women's sports? Like, can we stop having the conversation about if this is a thing yet?

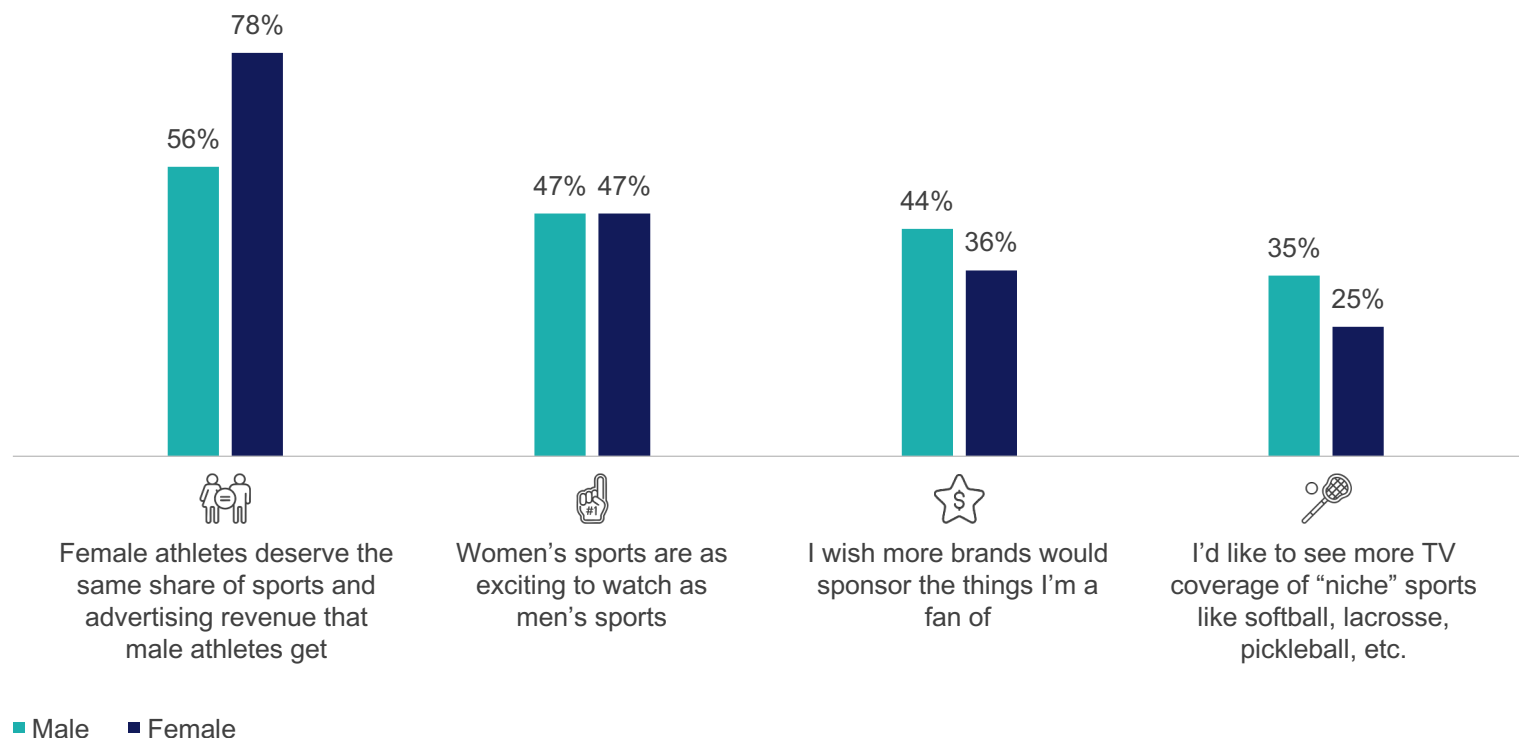
Alana Casner: The audiences are there. Sellouts are happening everywhere. Fandom exists. It's unfortunate that it took until 2025 for people in charge of the dollars and cents to get it. The LA 2028 Olympic games will be huge for some of the more niche sports and athletes. In 10 years, I think people will finally see that this is not just momentum. It's what the standard should be for women's sports from a viewership, fandom and earning perspective. And it won't just be the mainstream sports that are having this growth.

Carmichael: How can women's sports and athletes broaden audiences for sports in general and vice versa?

Casner: Women athletes, their fans and those that are on the periphery paying attention are already helping move the needle. I go to a ton of WNBA Liberty games. That arena is filled with men, women, kids, families and bros who hang out at the local bar who now have season tickets because it's way more fun to go to a Liberty game than a Knicks game. Sorry, Knicks.

Men and women agree women's sports is exciting but differ on coverage

Q. How much do you agree or disagree with the following? (% Agree)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)

Carmichael: How can we break the chicken-and-egg cycle of not having enough coverage to build an audience and not having an audience to merit more coverage?

Casner: Over the last 24 months we've seen the beginnings of that. NCAA women's basketball is finally now getting its March Madness to be a separate entity sold for media rights. It was always bundled with the men's. The viewership numbers speak for themselves. The media channels and the networks are starting to see that the women's sporting events are outperforming other events that have been in those time slots. There's nothing new happening in men's sports.

Carmichael: Can brands help develop this fandom?

Casner: We need more champions at different brands to invest in commercial slots. Women's sports fans are almost three times more likely to purchase a product recommended by a woman athlete than any other type of influencer.

Look at what Unrivaled 3-on-3 women's basketball did with their TNT and Turner Sports deal. They're airing Friday nights, Saturday afternoons and Monday nights on all the Turner channels. Turner saw the value, and they have so much sponsorship they were able to raise so quickly.

Carmichael: How does fandom differ between men's sports and women's sports?

Casner: For women athletes, you enjoy them as a person, and you care about what they're into and you might trust what they say. They're so much more relatable. They care about their fans and like to engage and make the kids happy. That is a huge difference between men's and women's sports. I've worked with a ton of pro women athletes over my career and a ton of pro male athletes over my career. I'm not saying there are not good eggs on the men's side, but the amount of time, effort and intention that the women put into everything they're doing — you see that as a fan of the sport, and you want to engage more with them.

Carmichael: Are brands catching on?

Casner: Parity has existed for four-plus years. The first two were spent convincing brands that they should work with these women. Talk about a frustrating conversation to have. But a lot of people did get it and bought in, and it was awesome. Now the conversations have shifted to brands that are coming to us, saying, "I want to invest in women's sports. I want our core brand audience to know that this is intentional and not that we're trying to check a box."

Matt Carmichael is editor of What the Future.



There's nothing new happening in men's sports. ... We need more champions at different brands to invest in commercial slots [for women's sports]."

As women's sports grow in popularity, brands need to get in the game today

Ipsos polling reveals that women's sports aren't just on the rise — they've already arrived. A plurality of Americans desire more coverage of women's sports, and half believe increased brand buy-in is a good business decision.

Major sponsors are backing women's leagues. Both college and professional female athletes are starring in multimillion-dollar campaigns. It is no longer enough for brands, both new and established, to just show up to women's sports — they must stand out.

To do so, brands need to focus on understanding women's sports fans, their expectations, and how they overlap with or differ from other audiences.

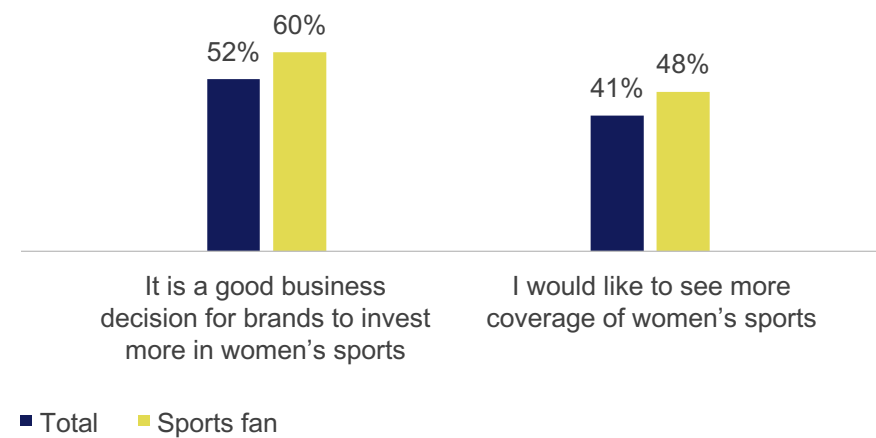
This also means brands need an accurate data provider, like Ipsos' KnowledgePanel, that accounts for fast-growing and harder-to-reach populations. The payoff is worth it. In this shifting landscape, the advantage is not with the first movers, but with the most-informed players.



Johnny Sawyer is a senior research manager with Ipsos' Public Affairs practice. johnny.sawyer@ipsos.com

Most sports fans back brands buying into women's sports

Q. To what extent do you agree or disagree with the following statement(s)? (% Agree)



(Source: Ipsos KnowledgePanel survey conducted Feb. 14-16, 2025, among 1,026 U.S. adults, including 698 sports fans.)

How to fix youth sports to build future generations of players and fans



Tom Farrey

Executive director, Sports and Society Program, Aspen Institute

In the past, kids got exercise by just being kids. Now, sports are a key way for youth to stay active while building self-esteem, interpersonal skills and wellness habits. The U.S. Department of Health and Human Services has set a 63% youth sports participation goal by 2030. Youth sports are also a fundamental part of the pipeline to fandom. When Tom Farrey thinks about the future, he acknowledges there is a lot wrong with the youth sports ecosystem, but he has concrete thoughts about how to fix it.

45%

of parents with a child in the household say they have a child who participates in a spectator activity through a school team.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 292 U.S. adults with a child in the household.)



What The Future interview with Tom Farrey

Matt Carmichael: What are the biggest barriers you see to kids playing sports today?

Tom Farrey: The fundamental flaw in the contemporary sports ecosystem for youth is that we are sorting the weak from the strong well before they grow into their bodies, their minds and their interests. We're creating travel teams at ever-earlier ages. That pushes aside the kids who are late bloomers or late starters who may just have a disadvantageous birthdate, meaning they are 11 months younger than other 7-year-olds. Plus, travel teams cost a lot. That structurally pushes children aside.

Carmichael: How did we get here?

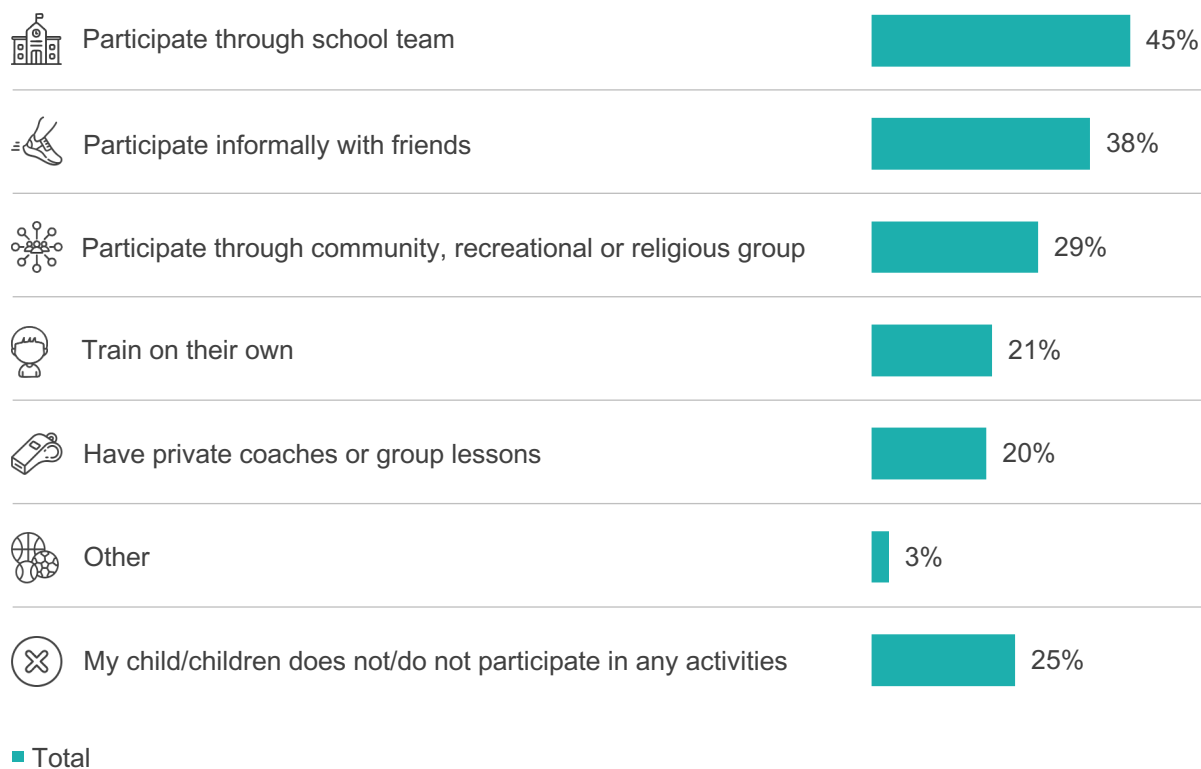
Farrey: Nobody drew up the system, it just sort of evolved. If you had a net promoter score at the end of the youth sport experience for sports parents, I suspect very few of them would give it a nine or a 10.

Carmichael: Can we break the cycle?

Farrey: USA Hockey has put together the American Development Model and adjusted their coach training products and their program standards and built it into their bylaws. They had a hard conversation around policy adjustments. Participation did rise, especially among girls, and the quality of the players that are coming out the back end after 10 years of this are better than they were a decade ago.

Most children participate in spectator activities through school

Q. Does your child/children participate in an activity where audiences or fans are part of the community in any of the following settings? (% Selected)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 292 U.S. adults with a child in the household.)

Carmichael: Who can make a difference? Is it the leagues, government policy, local park districts?

Farrey: At the bottom up, sports are delivered locally in municipally owned fields and gyms and recreational infrastructure and in schools. The public owns them and rents those spaces out to nonprofits and for-profits. Right now, they don't ask much. It's, "Do you have insurance, and can you pay?" There's no reason a community can't say, "We're going to give preferred slots in the schedule to the organizations that most reflect the makeup of our community." There's a real conversation that could be had with mayors about what type of local sports ecosystem we want to have. And then how do we align our facility-use policies in a manner that promotes that vision. Mayors get stuff done. They just don't always know where to start.

Carmichael: Private equity firms have been coming into the youth sports space. How will that factor in?

Farrey: Private equity could be either the best or the worst thing to happen to youth sports. It's still a largely volunteer-driven space — well-meaning people who are just winging it. Sometimes kids suffer as a consequence. So more professional management could bring more professional delivery of youth sports in this country.

Carmichael: And the worst thing?

Farrey: It could be the worst thing if they come in and all they try to do is pull out costs, and they don't take a longer view than they typically do for investments and ultimately monetize models that engage a broader swath of the youth population. About 54% of kids play sports. That's down from about 58% pre-pandemic. While sports are rebounding, we're trying to suck more and more money out of a smaller portion of the youth population.

Carmichael: How do we keep girls involved?

Farrey: We keep girls involved in sports by doing the same thing we want to happen with boys. But there are specific challenges that need to be addressed, too. One of those is injuries. Girls have far higher rates of ACL injuries. We need to have a conversation around early sports specialization and just what's a developmentally appropriate experience.

Carmichael: How will climate change affect youth sports?

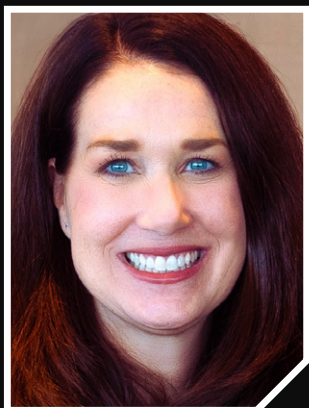
Farrey: It's already having an impact. We released a report called "State of Play Baton Rouge," and the main recommendations are around climate change. It's dangerous and potentially deadly to play football in summer. Should it be shifted to more of a winter schedule? Things simply have just gotten too hot.

Matt Carmichael is editor of What the Future.



Private equity could be either the best or the worst thing to happen to youth sports."

How sponsorships help brands tap into new audiences for the long game



Ann Legan

Global vice president of marketing, Miller family of brands at Molson Coors Beverage Company

It's hard not to associate sports in America with "Miller Time." The brand has a long legacy of sponsorship and has used it throughout the decades to tap into the fandom of mass audiences of potential beer drinkers. As Ann Legan, global vice president of marketing for the Miller family of brands at Molson Coors Beverage Company, thinks about the future, she's looking at novel ways to connect with new audiences.

#1

is how Americans rank cost as a barrier that has limited their access to fandom opportunities, followed by travel, distance and time.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)



Matt Carmichael: How do you view the differences between advertising and more direct sponsorship with entertainment and sports?

Ann Legan: With traditional advertising, you have more control. It's shorter term, and you can reach a lot more people. With sponsorship or a strategic alliance, that has a longer-term horizon. There's usually a distinct audience that we're able to tap into, and we're trying to align over a common interest and passion point. In beer, we partner with sports or music or you name the passion. It allows us to connect at a deeper level with our consumers.

Carmichael: What are some favorite examples?

Legan: Fandom is all about passion. A lot of what put Miller Lite on the map was our partnering with different athletes through time and showcasing them in our commercials. The history of the brand is everything, from our All-Stars campaign where we partnered with John Madden or Bob Uecker, or our longstanding relationships with the Dallas Cowboys, where we cultivate a unique fan experience with different Miller Lite fan experiences throughout that stadium.

Carmichael: Ipsos data shows price is often a barrier for fans. How can sponsorship make access easier?

Legan: It comes down to content creation and leveraging technology to get that information out to consumers.

We've just entered a relationship with Top Rank Boxing that allows us to tap into a unique fandom, unlike the NFL and MLB. It's a more multicultural and younger legal drinking age (21+) consumer demographic. Our partnership gives fans unique experiences through custom content creation with different fighters telling their stories through the Top Rank channels and our own.

Carmichael: How do you keep relationships going?

Legan: That's one of the biggest reasons we do these sponsorships: to generate content that we can push out throughout the year and not just one point in time. We sponsor Luke Combs' concerts, but we're also working with him throughout the year to push out custom content in our social channels. We had him visit our brewery in Milwaukee and talk to our employees. He has such a relationship with the brand and the company that we've been able to amplify.

Carmichael: And you can reach different audiences?

Legan: We just sponsored Unrivaled, the 3-on-3 basketball tournament featuring women from the WNBA. The events themselves are small, but it's televised, so that gets pushed out, and we can leverage that content to people who are interested in women's sports. You can take something niche and package it up and amplify it.

Matt Carmichael is editor of What the Future.



We just sponsored Unrivaled, the 3-on-3 basketball tournament featuring women from the WNBA. ... You can take something niche and package it up and amplify it."

Why earlier fan input is the secret to sponsorship success

When marketers invest in sponsorship ads, they're betting that fans' affinity for the main event will rub off on their brand. But Ipsos research on advertising effectiveness offers ample evidence that ads need relatability and authenticity to convert that attention to connection.

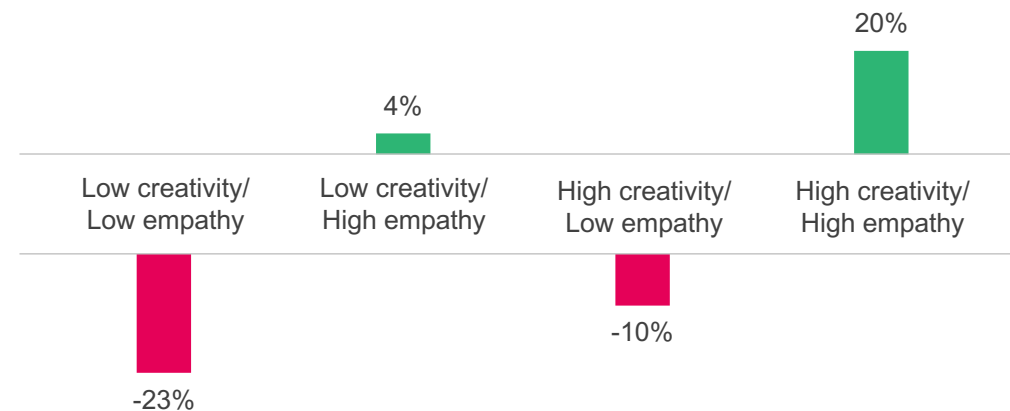
The only way to ensure these values are present in the final product is to make sure they're there before creative development. But all too often, brands and agencies cobble together old research, secondary sources and educated guesses to draft their briefs.

Instead, strategy development and assessment tools like Ipsos' Creative Fuel can bring internal and external audiences into the earliest stages of that process, ensuring marketers have an authentic understanding of how to connect with fans from day one.

By giving target audiences a voice in these foundational conversations, marketers can get off on the right foot with campaign briefs that reflect meaningful connections between fans and brands and lead to more effective advertising.

Ads that blend creativity with empathy toward consumers are 20% more effective than average

Creative Effect Index average performance (% Difference)



(Source: Ipsos Creative Excellence Creative Effect Index, 2025.)



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Why brands should reinvent sponsorships for the digital fandom era



Nick Kelly

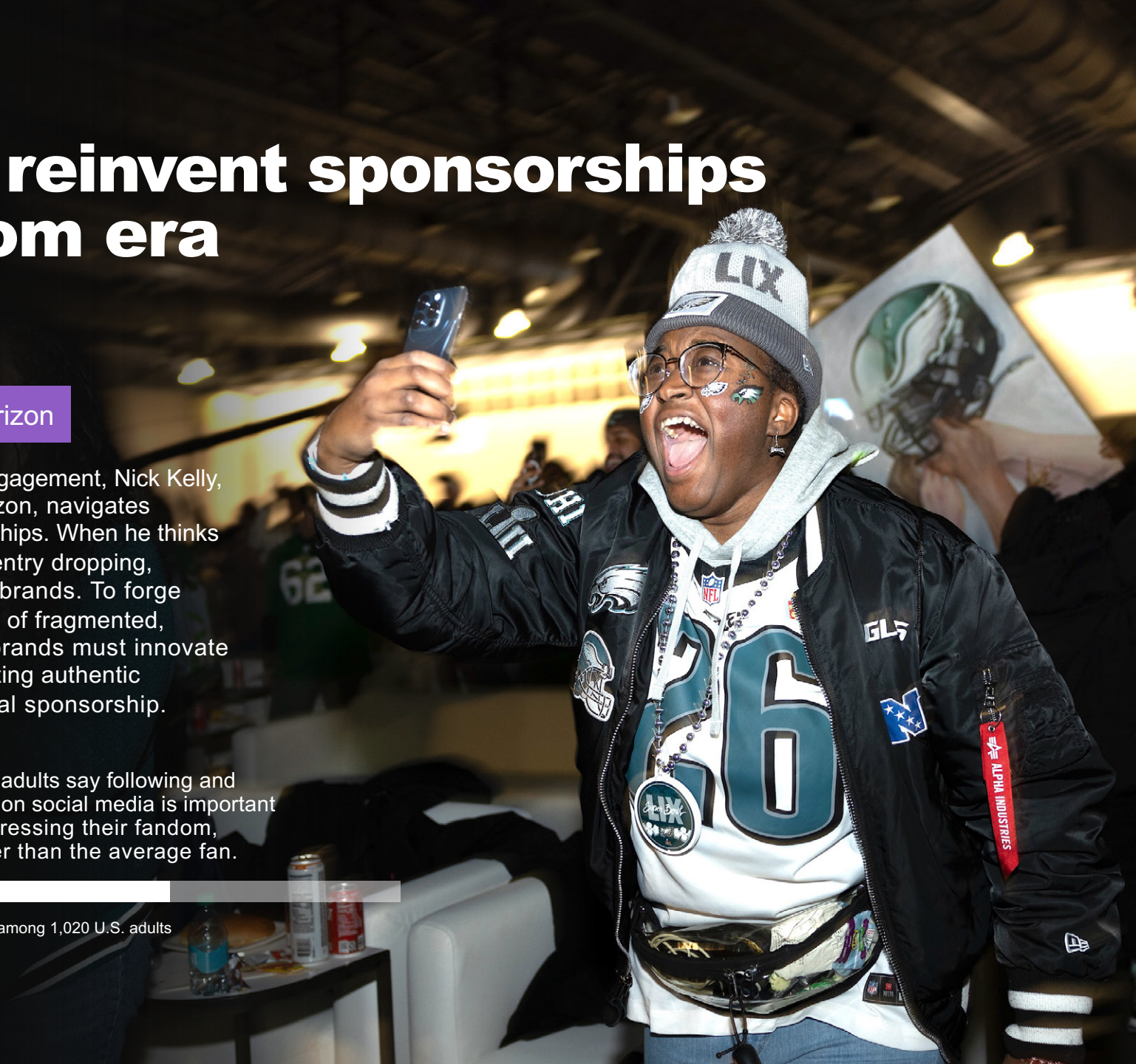
Vice president, partnerships, Verizon

As technology rapidly reshapes fan engagement, Nick Kelly, vice president of partnerships at Verizon, navigates the changing terrain of brand sponsorships. When he thinks about the future, he sees barriers to entry dropping, creating a crowded marketplace for brands. To forge meaningful fan connections in an era of fragmented, digital-first experiences, Kelly says brands must innovate and personalize their approach, creating authentic connections that transcend traditional sponsorship.

71%

of the youngest adults say following and sharing content on social media is important to them for expressing their fandom, 20 points higher than the average fan.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)



What The Future interview with Nick Kelly

Kate MacArthur: How important are phones to fans?

Nick Kelly: As technology and the ability to share experiences have evolved, we are at the center of that. Once we converted a lot of venues and experiences to 5G, you have reliable service. You can see when you go to something like a Taylor Swift concert, you've got 30,000 to 40,000 people livestreaming to their friends and family. That wasn't possible three or four years ago.

MacArthur: How does that shape fan experiences?

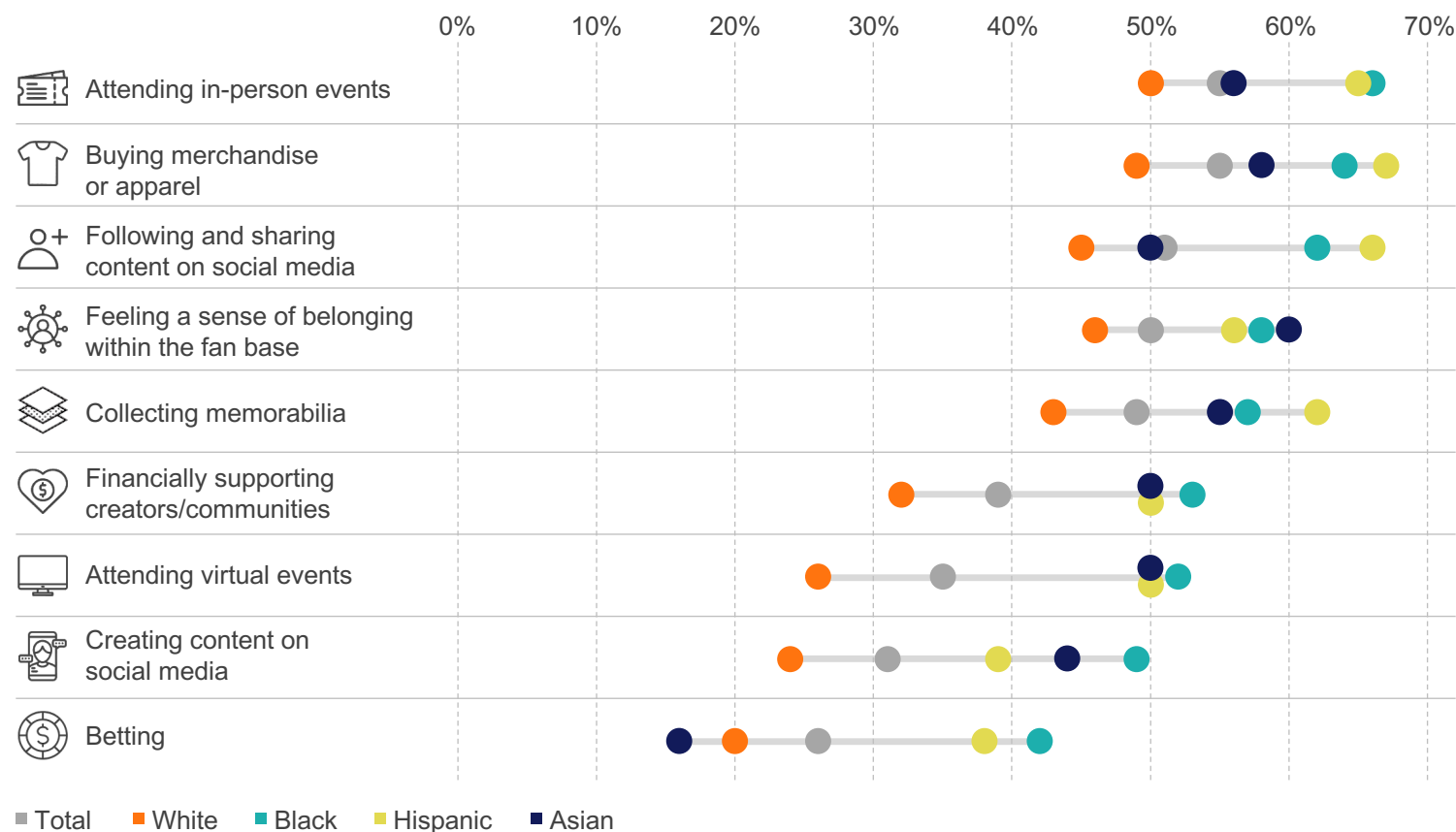
Kelly: The expectation of how a fan shares their experience now is far different because it's vanity, "Look how cool it is that I came to this event." You look at big moments of an average Monday night basketball game to the Super Bowl to the World Cup. These are once-in-a-lifetime experiences fans want to document and share.

MacArthur: What trends are you seeing in fan behavior?

Kelly: The fan behavior at concerts used to be 90% of the data being utilized in a venue was downloaded. In the last 12 to 18 months, it's switched to about 60% now being uploaded. Fans are sharing what they're doing. They're not trying to be reached. So it's changed us, as in, "How can I provide a service or an experience at this event?" They're spending this time on the phone to share their experience, not to be disconnected from it.

Not all people express their fandom the same

Q. How important, if at all, are the following aspects to you personally for expressing your fandom? (% Important)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)

MacArthur: How does supporting fan experiences nurture a brand's fandom?

Kelly: It's almost like they can count on us as a Beyoncé fan that if they can't get tickets in her regular fan presale, there's a high likelihood they're going to get some because they're a Verizon customer. Our ability to have that kind of tie to a passionate fan base has become invaluable to us because they see direct value in it.

MacArthur: How does AI fit in personalizing experiences?

Kelly: We're using AI tools to provide a personalized experience and offers that you care about. It's the continued modeling of the more you work with us, the better we can predict from an AI perspective what we should be offering you. Utilizing it more on the chatbot side and customer service has enhanced the customer experience within the last month. It's getting better and better by the day.

MacArthur: How do you see the balance of global to national to local fan engagement evolving?

Kelly: There are so many people who will never get the chance to go to a Taylor Swift concert. Look at the upcoming Olympics, the World Cup. The ability for brands to take a global event and win locally will be the ones that see the greatest short- and long-term returns.

MacArthur: Your Super Bowl FanFest seemed like a big hit. How are you measuring its success?

Kelly: First, sustained conversation in earned media and social media. Then we measured how many tickets were redeemed. Third, what brand-health metrics come back from this 30, 60, 90 days out: Driving gross ads? Retention? Those things we measure every marketing campaign against. It has to deliver a similar level of value or as efficiently, if not more efficiently, than some of the other things we do.

MacArthur: In our Future of Fandom survey, younger fans show stronger engagement and a higher likelihood to buy products. What's your takeaway?

Kelly: The younger generation is far more prepared to tune out commercial messages and ads. So when we're helping empower something that they care about, like sports or music, that's super powerful. This data continues to shift toward younger customers valuing experiences over things. If we can provide fans incremental value of behind-the-scenes content, early access to tickets or an enhanced experience at the event, we hope they remember, "I got this because I'm a Verizon customer."

Kate MacArthur is managing editor of What the Future.



You look at big moments of an average Monday night basketball game to the Super Bowl to the World Cup. These are once-in-a-lifetime experiences fans want to document and share."

How digital platforms will reshape brands' roles in fan communities



Nadine Zylstra

Global head of programming and originals, Pinterest

How fans consume content is expanding from bedroom walls adorned with posters and merch to endless scrolling on digital platforms. Nadine Zylstra, global head of programming and originals at Pinterest, envisions a future where brands leverage the platform's blend of individual curation and community trends. She believes fan communities have evolved into powerful digital organisms that are deeply connected and capable of driving significant action.

47%

of Americans with moderate incomes participate in social media fan groups.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)



What The Future interview with Nadine Zylstra

Kate MacArthur: How does fandom factor into Pinterest?

Nadine Zylstra: What's cool about Pinterest is you can aggregate everything you're interested in in one place, and it's actionable. Fans and fan communities gravitate to the platform because if you're looking for a new outfit for an upcoming concert, you can curate the best inspo in one place. It's cool to watch how fans use the platform to drive things they're actioning in their lives.

MacArthur: How do you see the role of platforms in fandom evolving in the future?

Zylstra: What's exciting about where fanship communities have evolved is they're so connected digitally they're an organism in themselves. We're connecting people globally and helping them bring their fandom into their real life.

MacArthur: What role do brands play with fandom in platform communities?

Zylstra: When brands are authentically listening to the community and meeting them with content or products or actionable things to bring that friendship into their life, that's when it really works. People plan a lot on Pinterest. We'd been tracking "Barbie" for two years before the movie came out because people were already passionate about that community.

People with moderate incomes are most active in fan communities

Q. Do you belong to any of the following communities related to your fandom(s)? (% Total)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)

MacArthur: How are platforms adapting to fan communities?

Zylstra: There's the fan originator layer and the community layer. We've noticed many K-pop bands using the platform for a new release or product coming out. What's interesting to me are the ways the fan community also uses the platform to make stories that happen outside of campaign cycles. The House of the Dragon fan community has 30,000 pins on a board that just hangs on that person's expression of fandom, even though we are not necessarily in the press cycle.

MacArthur: How does this shape fan engagement?

Zylstra: Commerce plays a very vibrant role in connecting the actual fan and the person who the fan's inspired by. If you want to express your K-pop fandom by getting a light saber from the concert, you can. It's not just about being a passive recipient of inspiration, but taking action in a way that's very attainable.

MacArthur: How can brands participate?

Zylstra: It goes back to that core question of authenticity. If a brand has enough self-awareness and intention around the fandom they're interested in, they can meet that fandom with an authentic expression. It does require really listening and coming to the community with something that's genuinely helpful.

MacArthur: How can brands measure fandom impact?

Zylstra: It's different for every platform but on Pinterest, the commerce piece helps make that connection. If we've built enough excitement from a fan community that they want to do something and that is measured very clearly in whether they purchase or show purchase intent, that's a helpful way to measure ROI.

MacArthur: How do you see human versus AI curation evolving?

Zylstra: Human curation is at the heart of Pinterest. Our platform is built on humans curating what they're passionate about. AI is still a fraction of the impressions on our platform. The way I'm most excited about AI is in serving the audience more completely. For example, when you search hair inspiration, you can choose your hair type, powered by AI. We use these tools to better meet the pinner with the most successful experience that we can give them. We launched a new body type range search last year. People who used the body type range search had a 66% higher engagement rate per session on Pinterest than those who hadn't used the tool. It really does matter that people feel they've been seen by the platform. And if we can use AI to help make it a better platform for you, that's amazing.

Kate MacArthur is managing editor of What the Future.



It really does matter that people feel they've been seen by the platform. And if we can use AI to help make it a better platform for you, that's amazing."

Why value proposition testing can spark fan loyalty

A fan following isn't just for celebrities and sports stars. As businesses cultivate closer and stronger bonds with their customers, brands have new opportunities to nurture their own fandoms.

But logos or taglines aren't enough to spark that connection — and landing on the right message takes more than rote claim testing.

Brands need to start with a deep analysis of their identity and how it intersects with fandom before they invest in marketing and promotion. This means uncovering the core functional and emotional benefits of sponsor-fan interactions and reflecting them consistently in every aspect of their sponsorship.

While traditional message testing has merit, today's complex marketing terrain calls for a more nuanced approach. Forward-thinking marketers are adopting holistic evaluation tools that assess messages on appeal, support and impact through high-quality business and consumer panels. This approach provides a comprehensive message effectiveness score, empowering marketers to craft campaigns that don't just resonate, but inspire true brand fandom.

In a crowded market, first impressions count. Clearly knowing your product and audience is the first step toward crafting messages that grab fans' attention and forge lasting bonds with them.



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How superfan expectations are reshaping brand-fan relationships



Kelsey Barnes

Swiftie

There are millions of Taylor Swift fans (Swifties) out there, but only a few have turned that passion into a career. Among them is Kelsey Barnes, a music journalist and former Swiftie advisor for the Victoria & Albert Museum in London. From Barnes' perspective as a superfan, Swift's close relationship with her fan base has helped her balance superstardom with authenticity. That offers important lessons about what fans of all kinds want from brands, and from fandom itself.

51%

of U.S. women consider themselves a fan of Taylor Swift.

(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)

What The Future interview with Kelsey Barnes

Christopher Good: How did you get into Taylor Swift?

Kelsey Barnes: I think I was 14 or 15. I just remember hearing “Teardrops on My Guitar” and feeling very seen, despite not never having any sort of romantic experience whatsoever. I’ve just been a fan ever since.

Good: She has really broad cross-generational appeal. Why do you think that is?

Barnes: There are kids who went to the “Eras Tour” that weren’t born when I started listening to her! But I think that speaks to her relatability, the universal aspect. It doesn’t really matter who or where you are. She was in Brazil. She was all over Europe. People feel seen, and it’s not something that’s specific to a country or age.

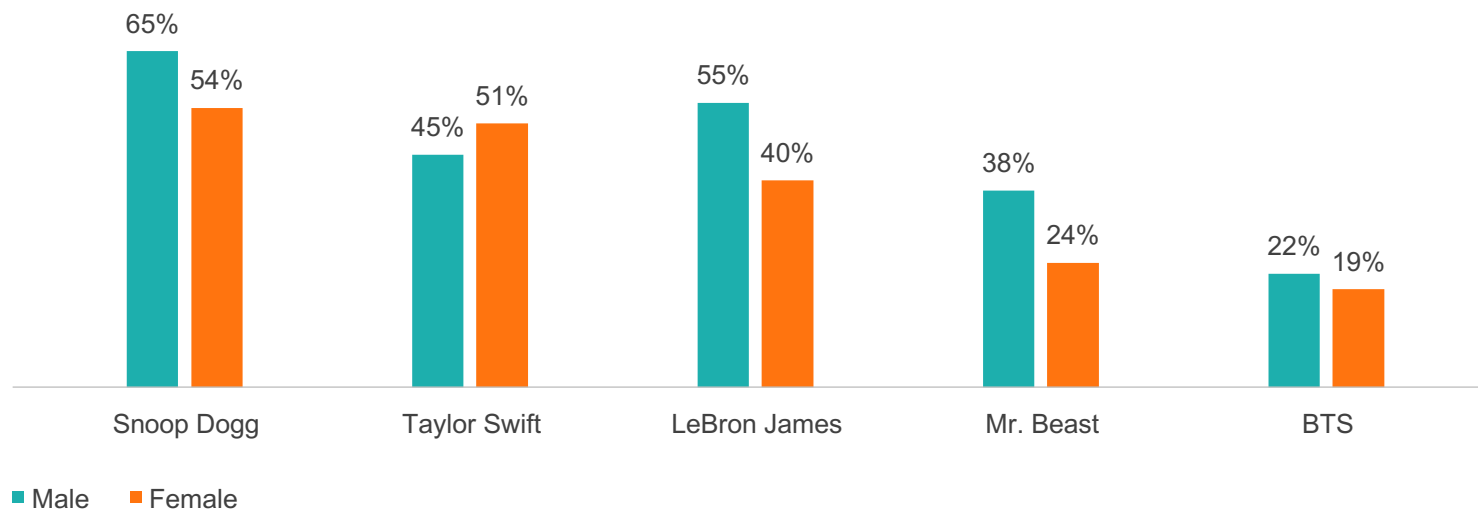
Good: Do you think you’ll be a fan for life?

Barnes: I’ve been a fan for over half my life now, so I don’t know a life without Taylor Swift. As I look around my room, I have a picture with her over here, a signed photo over there. She’s more or less all around me!

I do think I’ll be a fan for life. It’s just not a relationship I have ever had with an artist. And that’s because of her world-building and lyricism, but also because she has a way of transcending the artist-to-fan relationship, which I don’t think a lot of artists are able to do.

Taylor Swift’s fandom skews more female than male

Q. To what extent, if at all, would you consider yourself a fan of the following: (% A fan)



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything, including 292 people with a child in the household.)

Good: How does she manage that relationship?

Barnes: I mean, back in 2009, she was replying to people on Myspace. Obviously as she's gotten bigger, she's not able to do that. But she still tries to do things where she's able to meet people.

Her team invites specific fans to come to events and gets in on the fandom’s jokes.

I still feel very close to her, in a way. To me, it doesn't seem like she's like the biggest artist in the world.

Good: How do Swifties express their fandom?

Barnes: A lot of my work as a journalist has been about trying to explain to people who might not understand Taylor Swift why certain moments mattered. But for others, art is the biggest one. I know people that have written books inspired by her songs. Also fan fiction, meetups, buying or making merch. Tattoos are big as well. I have a Taylor Swift tattoo, and my friends do too.

And inside jokes. Taylor has a line about “feeling like a crumpled-up piece of paper on the floor” — and on the “Eras Tour,” someone came in costume as a crumpled-up paper on the floor. It’s so niche and specific, but immediately you know the reference!

Good: Is there a right or wrong way for brands to engage with fans and fandoms?

Barnes: I mean, the wrong way is anything negative — like anything to do with Taylor being a serial dater. But the good ones just engage with the inside jokes. This is so stupid, but I think once Taylor was in Travis Kelce’s [stadium] box eating chicken fingers with ranch, and an update account tweeted “seemingly ranch.” It became this big joke in the fandom, and then at one of the London shows, one of the venue’s food options was chicken fingers “with seemingly ranch.” Taylor wasn’t even involved in that joke! But the fans lost their minds.

Good: What do fans actually want from fandom?

Barnes: The constant output is a big thing. Taylor seems to be releasing something at least once a year. But it’s also about finding people to engage with. I met some of my best friends online through Taylor, just because we happened to be in the same forums or I saw their tweet. I think community is something fans are looking for.

Good: Would you say it’s a sort of common ground?

Barnes: Exactly. I think the reason people decide to get really invested in a fandom is that it’s another aspect of being seen. They can feel seen in Taylor’s work, but they can also feel seen by talking to like-minded people. I mean, there’s a reason football fans or soccer fans all come together and cheer on a team. They feel seen in that environment.

Good: Why does “feeling seen” matter so much?

Barnes: I think the artists, brands, whatever, that connect with people are able to make these very specific moments universal. Like, Taylor has a song called “22” and we’ve all been 22, you know? It can be something as silly as that. But I think that’s why people feel so seen in her work is because it doesn’t matter if she’s going through a heartbreak, whatever she’s experiencing, somebody else has probably felt those same feelings.

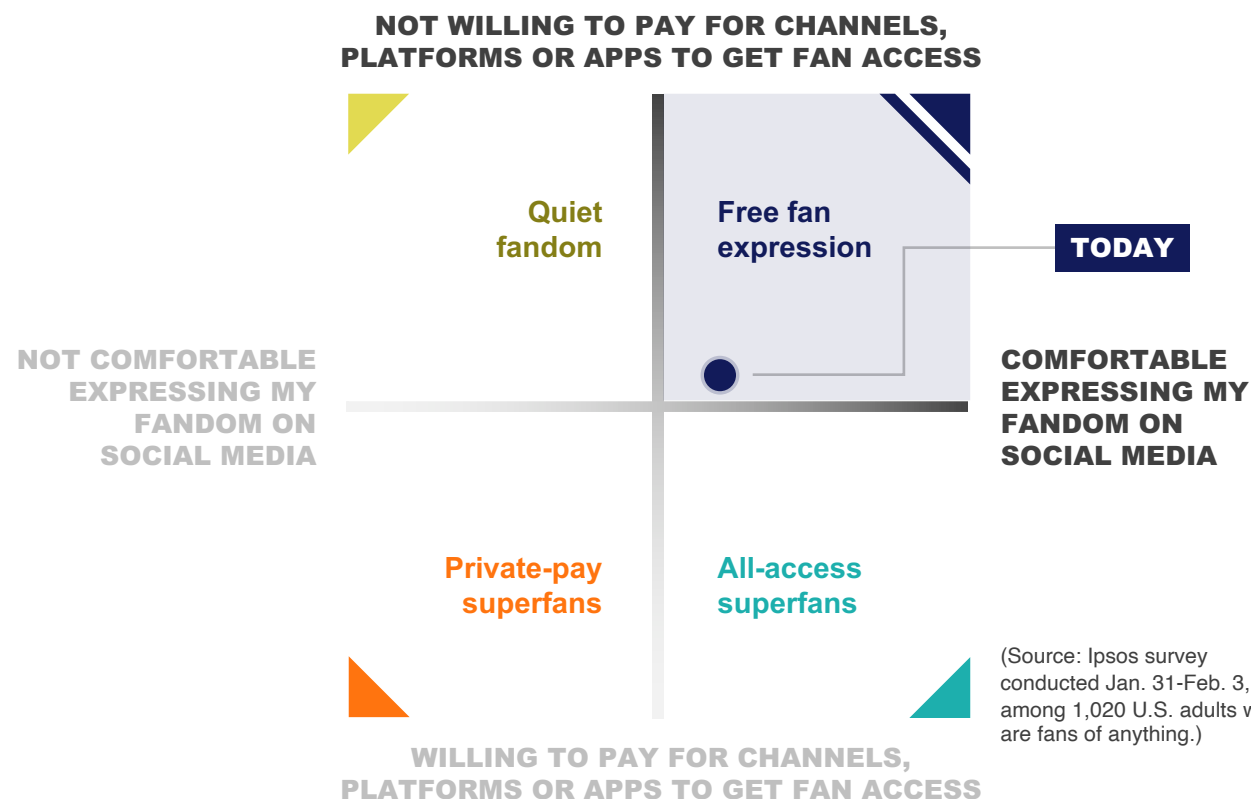
Christopher Good is a staff writer for What the Future.



As I look around my room, I have a picture with her over here, a signed photo over there. She’s more or less all around me!”

How will paid access vs. social expression drive fan behavior?

The future is always in tension. We can measure those contradictions today with forced-choice questions. We plotted two responses against each other in a classic 2x2 grid. If nothing changes, we'll stay where we are. But this way you can see how far opinion would have to shift to move us into a different quadrant in the future.



(Source: Ipsos survey conducted Jan. 31-Feb. 3, 2025, among 1,020 U.S. adults who are fans of anything.)

This tension is the epitome of modern fan culture: We have the urge to connect, share and belong to a larger community of like-minded stans, as long as it brings us influence rather than judgment. Yet the actual currency of fandom sits between life experiences worth any cost and the belief that recorded experiences should be freely accessible.

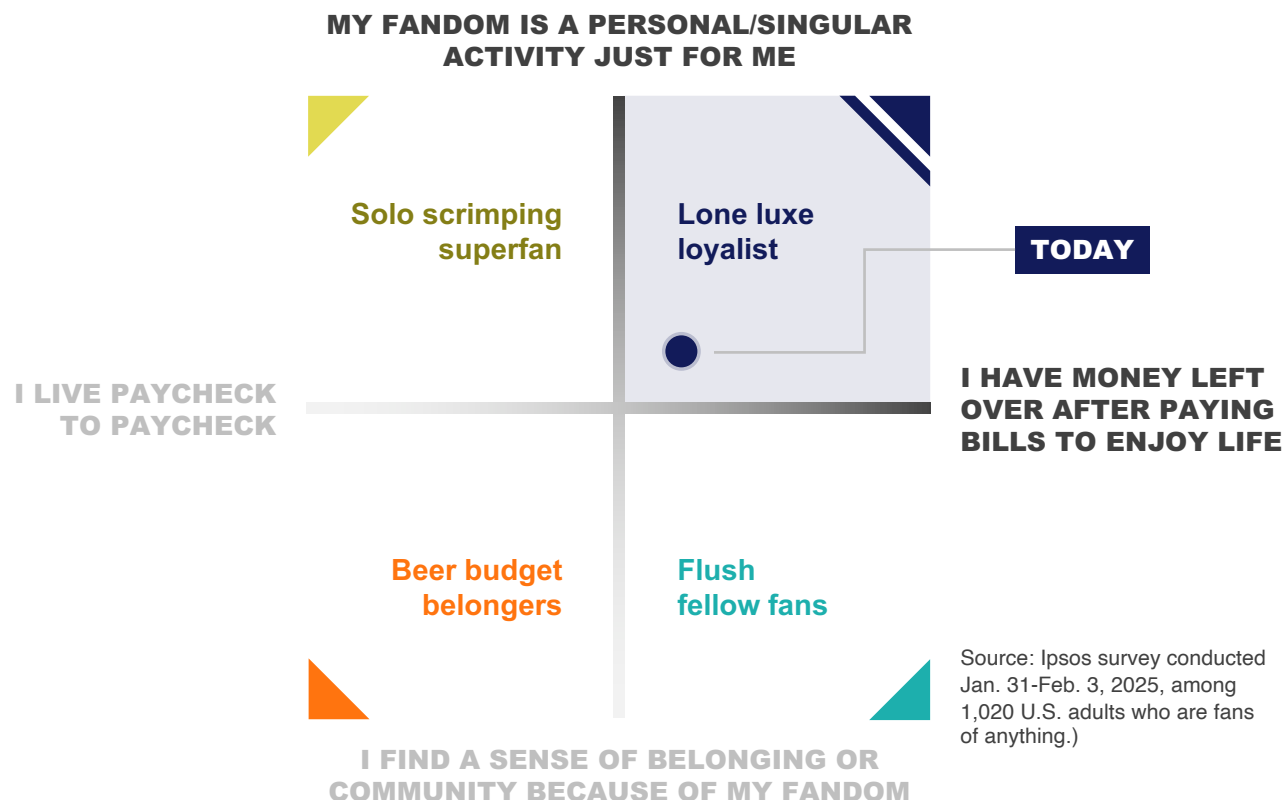
Of course, many fans are living vicariously through all-access passholders with every like, comment and post. But are they reveling in the moment or hate-watching?

In the future, ad-sponsored, freemium fan channels or apps could offer content based on loyalty points and premium access for AI-personalized upgrades.

To shift quadrants, we'd need to adjust our attitudes toward online vulnerability, monetization of fandom and the balance between private enjoyment and public expression. But will our ever-growing appetite for content and connection make that a dream or a reality?

How will income vs. belonging shape fandom?

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Today, fans are at the intersection of financial reality and private pursuit. On one side is our ability, or lack thereof, to indulge in our passions based on income. On the other, is fandom as a solo activity or a path to belonging. Imagine the solitary collector carefully arranging memorabilia or rewatching their favorite series alone but content.

We most often see people outfitted in official merch at fan conventions or in online communities. Does this mean we're all really introverts in an extrovert's world?

In one possible future, fans of any stripe could earn access and merch for doing acts of kindness or community service.

To move quadrants, our perceptions of fandom as private or communal will need to shift, along with how we prioritize our spending. But will our yen for connection and the accessibility of fan communities online make that shift more or less likely? And how will growing financial uncertainty play into this world?

Implications: Where the opportunities are for...



Travel/hospitality

- Develop fan travel itineraries attending live events with exclusive access to fan-only venues and local fan communities
- Via AI, curate personalized experiences tailored to fans' preferences, such as relevant dining options, activities and accommodations
- Offer VR experiences of fan-relevant destinations for those unable to travel



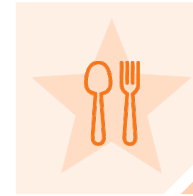
Entertainment

- Offer fan crowdfunding/ investment in their favorite productions
- Launch fan-driven content-creation platforms to allow supporters to shape storylines in real time
- Develop AI “fandom concierges” for personalized, cross-platform experiences
- Create fan-voted/co-created stage experiences for live/virtual shows



Technology

- Create “empath-tech” adjusting content based on viewers' biometric emotional responses
- Enable cross-reality fan engagement, across physical spaces, VR and AR environments simultaneously
- Establish decentralized fan ownership models, for creative decision participation



Food/beverage

- Expand AR-driven dining experiences tied to popular fandoms
- Offer real-time menu items based on trending fandom discussions online during broadcasts



Retail/consumer

- Build adaptive merchandise platforms that update based on real-time fan interactions
- Introduce AI-driven “predictive merch” that anticipates fandom shifts with limited-time, exclusive offers

With contributions from Ipsos'

Aron Galonsky, Matt Palmer and Jessica Phan

Unlock a glimpse into the future

Discover thousands of insights on evolving consumer attitudes and tension points.

Access our free, comprehensive survey data about the Future of Fandom instantly on the What the Future website. See demographic splits and more. Empower your business with foresight-driven strategies today.

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