

creativefutures
PRESENTS

Fan Z

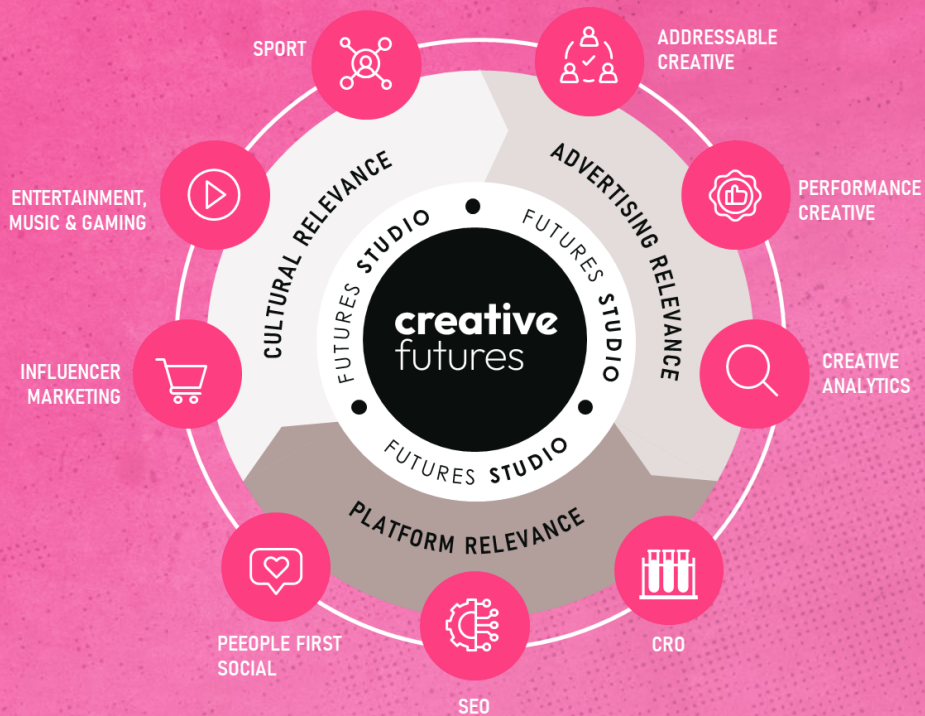
A new generation of sports fandom



Chris Hitchcock
Chief of Creative Futures



Dan Collier-Hill
Head of Strategy, Creative Futures



Who is Creative Futures?

We're 46 people, across 3 states with 9 disciplines

We're all about driving relevance.

Our work is the integration of content, context & creative to maximise the potential of modern media



**Australian Open 2024:
Athlete-led social content**

**Extra Jam 2023/24:
Ownership of
street basketball**

**SOO BIG BUCKET 2022:
Standing out in a
cluttered space**



A diverse group of eight young adults, including men and women of various ethnicities, are walking in a line against a stone wall. They are all looking down at their smartphones, suggesting a high level of digital engagement. The image has a purple tint. The text 'Gen Z is forcing us to innovate' is overlaid in the center in a large, white, bold, sans-serif font.

**Gen Z is forcing
us to innovate**

Gen Z are a different type of fan.

**They behave differently.
they consume differently.**

**IT'S TIME TO RIP UP THE
OLD RULEBOOK**

A group of young people, likely fans, are shown in profile, looking down at their smartphones. The scene is dimly lit with a blue tint, suggesting a concert or event. The text 'Who is Fan Z?' is overlaid in large, white, bold letters.

Who is Fan Z?

90% favour

AUTHENTICITY

Curation



82% follow
ATHLETES

Teams or leagues

***Unafraid to
speak their
minds***





50% do not regularly
WATCH OR ATTEND
the live game

Historically, sports fandom was
BUILT OFF THE RITUALS
of live sport



SPORT HAS NOW EVOLVED

**With shorter formats, more content
and advanced digital capabilities**



The new ecosystem has created
A GENERATIONAL SHIFT
in how we engage with fans

The new rules of Fan Z





Insight #1
**Fandom has
evolved beyond
the live game**



53%

**Of new F1 fans say
they watched a race
because of DTS**



70%

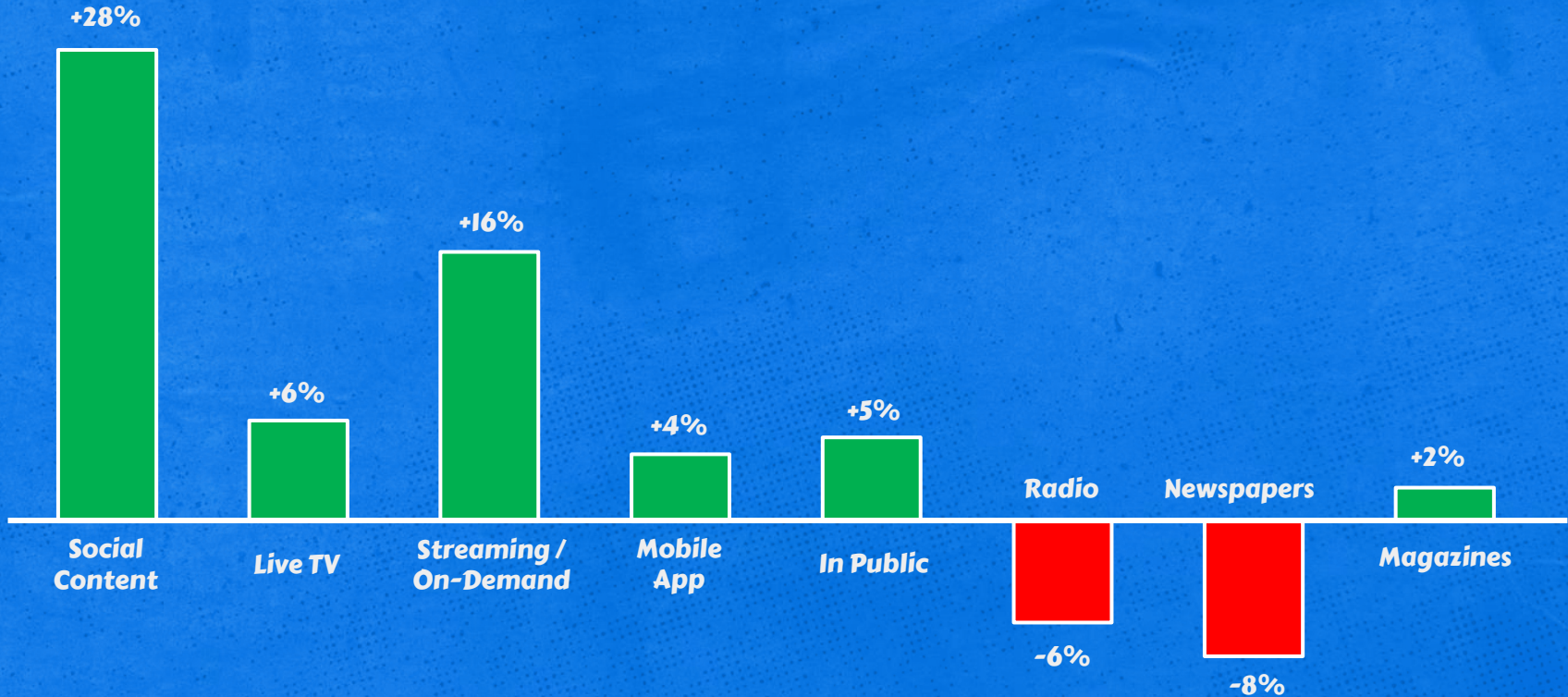
**Increase in EPL viewership
outside of the UK,
thanks to Ted Lasso**



57%

**Of Tik Tok users
now watch sport
content weekly**

YOY Growth / Decline in Consumption of Sport

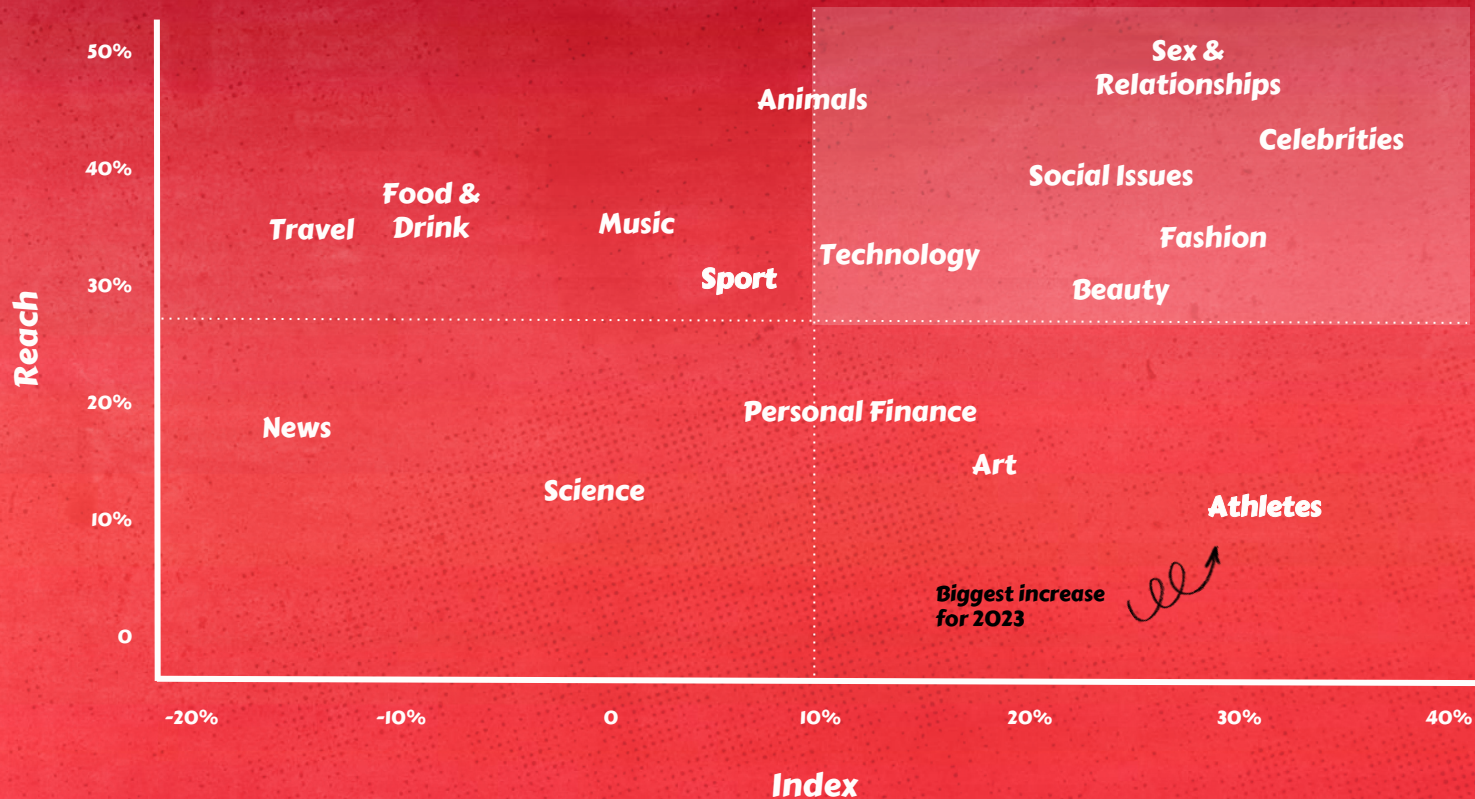


A woman with long blonde hair, wearing a white beanie and a red jacket with white and yellow accents, is walking through a crowd. The background is blurred, showing other people and lights. The entire image has a red tint and a halftone dot pattern.

Insight #2

**Isolating interests
reduces cut through**

Fan Z interests

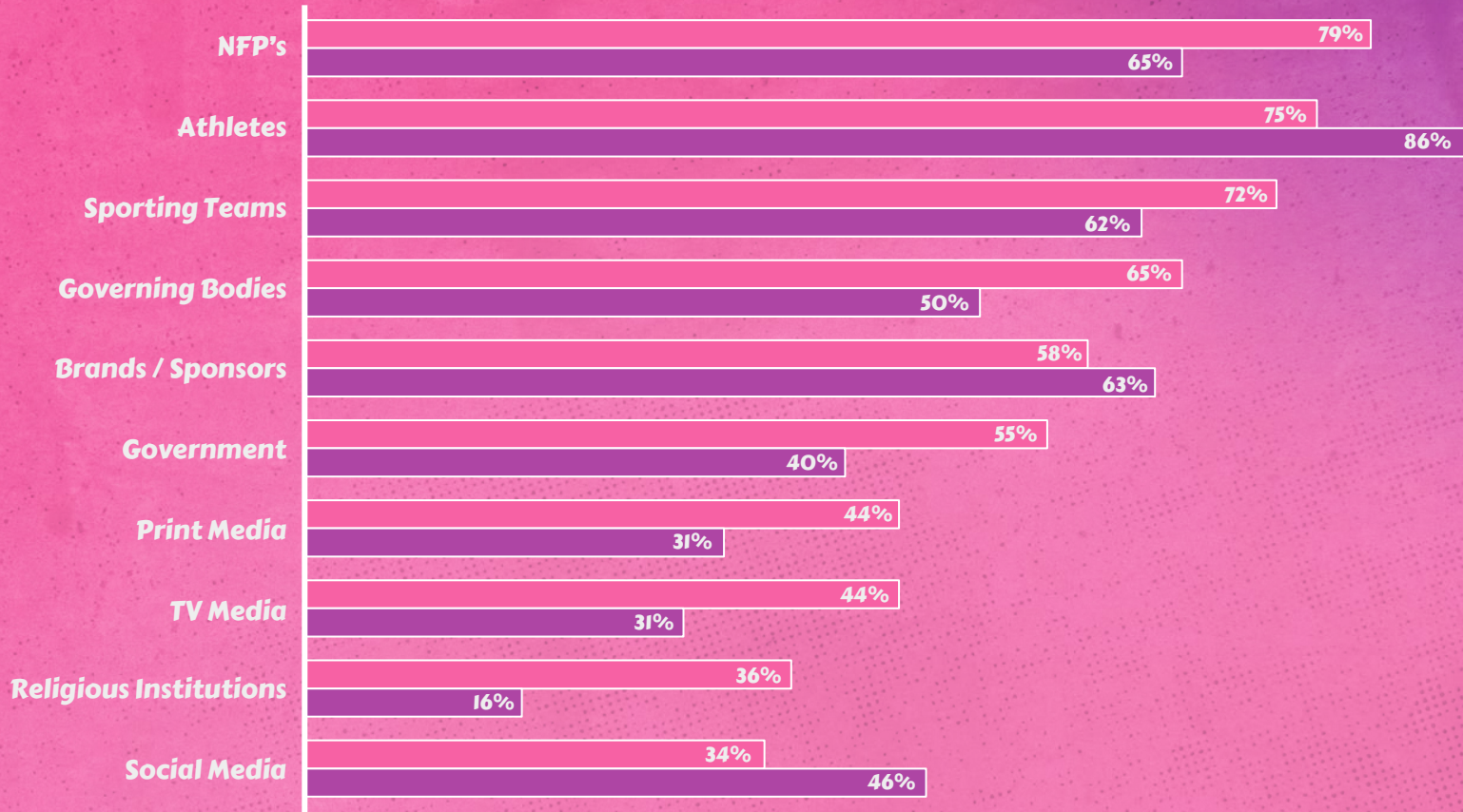




Insights #3

**Fan Z have a booming
affinity with Athletes**

Fan Z Trust in People or Institutions

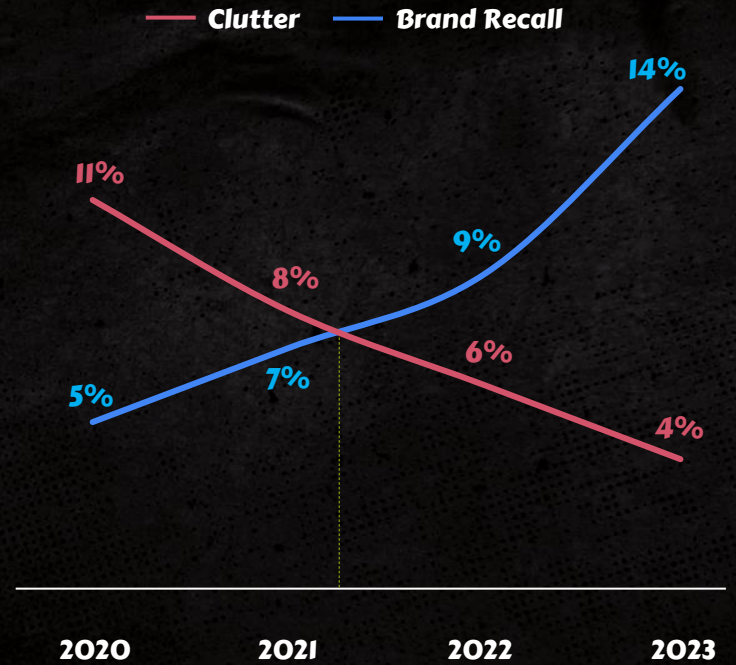
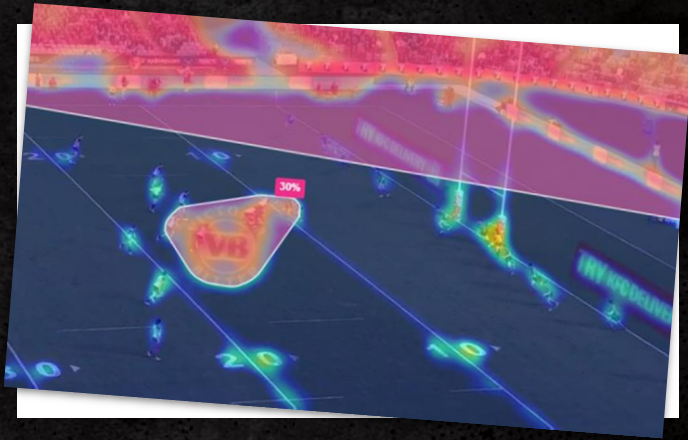


Insight #4

Fan Z don't care about the logos



Growth vs Clutter



Inflection point, where rights holders began selling more awareness-based assets



Rule #1

***Plan to participate
in their world***





Rule #2

No more tick box tactics



Rule #3

Build around Athletes

Rule #4

**Stop interrupting their
experience, add to it**



The new rules of Fan Z

Insight #1

**Fandom has evolved
beyond the live game**



Rule #1

**Plan to participate in
their world**

Insight #2

**Isolating interests
reduces cut through**



Rule #2

**No more tick
box tactics**

Insight #3

**Fan Z have a booming
affinity with Athletes**



Rule #3

**Build around
Athletes**

Insight #4

**Fan Z don't care
about the logos**



Rule #4

**Stop interrupting their
experience, add to it**

Thank You

