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The Rise of Gamified Fandom: Why Gen Z Is Reshaping the Sports Industry

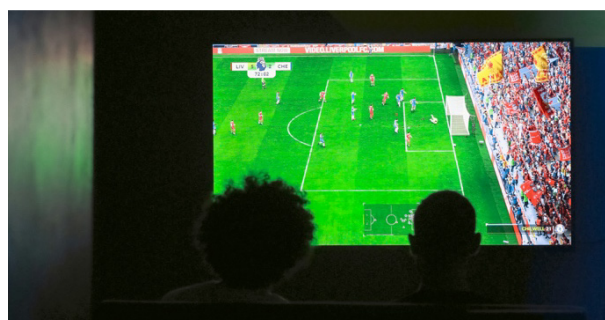
Identifying megatrends and generating investment ideas aren't found just in spreadsheets. They're uncovered in observing and analysing shifting social, cultural, and technological behaviours often long before the numbers reflect them.

A clear example is the evolution of sports fandom. While ~28% of Americans still identify as avid fans, how younger audiences engage has fundamentally changed. **For those under 40, only 25% of weekly sports content is consumed live.** The rest? Bite-sized TikTok clips, YouTube edits, fantasy leagues and increasingly, video games.

Gaming has become a gateway to fandom. **Over 50% of Gen Z fans say sports video games and fantasy leagues increase their real-world engagement—almost double that of older generations.** Titles like FIFA and Madden aren't just entertainment they're onboarding tools. A UK study found 89% of sports gamers also play the physical sport, and 25% credit the video game for sparking that interest.

This isn't a niche trend. Twitch draws over 30 million daily viewers, and global esports audiences surpassed 611 million in 2024 predominantly under 35. Games like Fortnite and Roblox now host sports-themed branded experiences, deepening fan relationships in interactive environments that rival traditional broadcast formats.

These trends are disrupting traditional media models. While NFL and NBA rights remain robust, college football and MLB are under pressure. Regional Sports Networks are declining, and teams are experimenting with hybrid or direct-to-consumer models. Yet, these risk alienating younger viewers who expect seamless, gamified, mobile-first experiences. MLS's move to Apple TV, for example, coincided with a 67% drop in Cup viewership.



In contrast, women's sports are thriving. **The WNBA gained over 17 million new fans last year, fuelled by Gen Z's demand for diverse role models and fresh narratives.** Much of this growth has been amplified through digital platforms and gaming crossovers, demonstrating how fandom is increasingly built online before it's felt in stadiums.

For investors, the message is clear: the future of sports lies not just in rights or ticket sales, but in interactive ecosystems. Video games, esports, and tech-enabled fan platforms sit at the intersection of media, identity, and engagement making them one of the most dynamic and underappreciated ways to gain exposure to structural shifts in entertainment and sport.