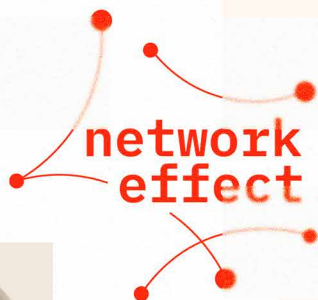
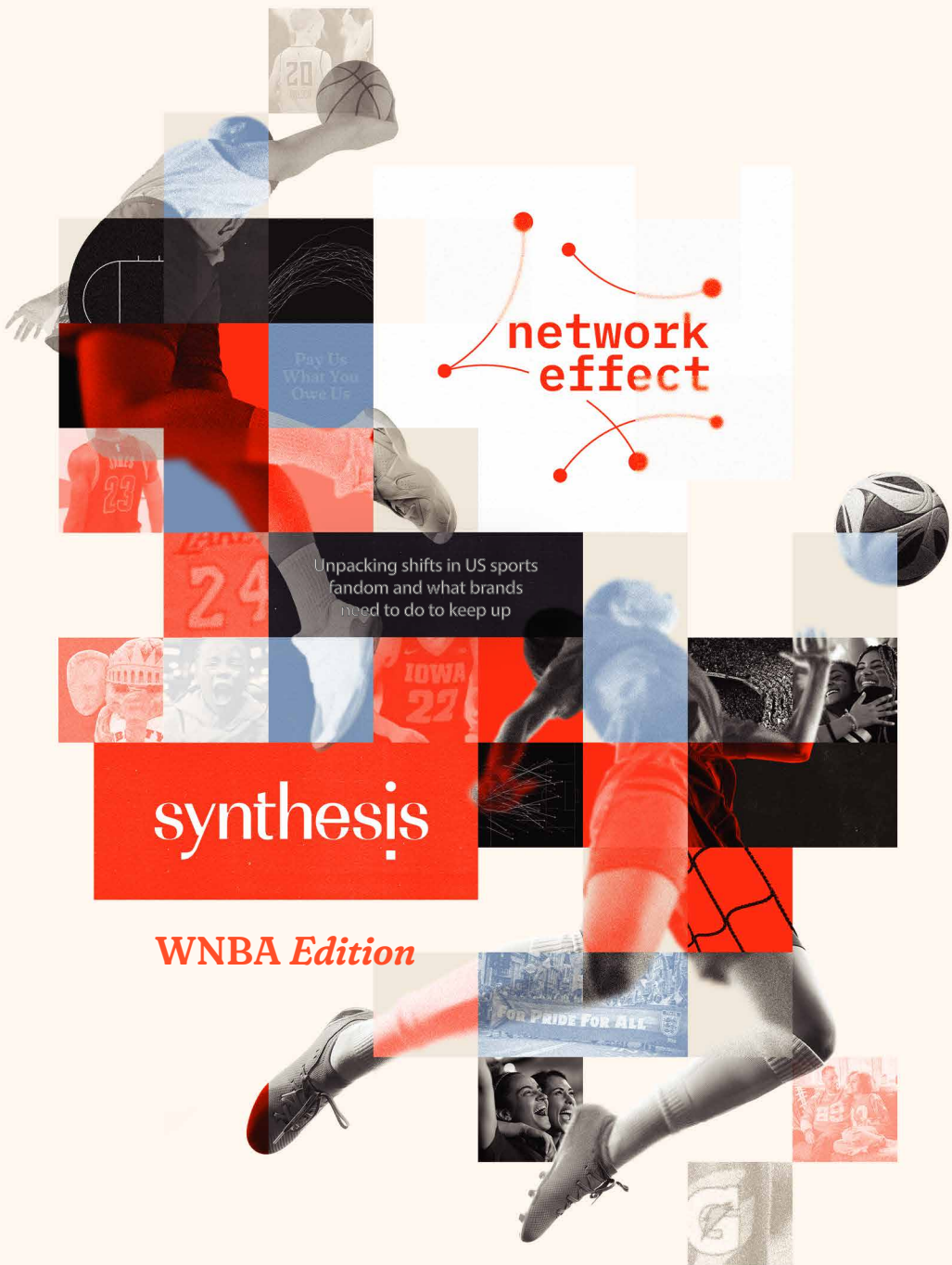




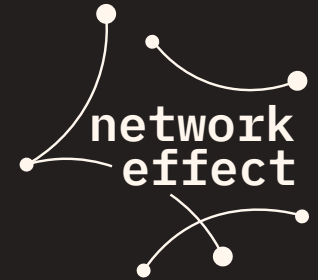
Pay Us
What You
Owe Us

Unpacking shifts in US sports
fandom and what brands
need to do to keep up

synthesis

WNBA *Edition*





Common Ground: When the world feels fractured, *fandom* holds us together.

In an America marked by division and uncertainty, people are searching for spaces that offer connection and relief. **Sport** has become an anchor, in the roar of packed stadiums and the pulse of online communities. It offers the comfort of tradition in an age of dislocation, the rush of shared celebration when everything else feels isolating, and a stage for a new generation to shape culture in more inclusive ways.

Fandom today goes *beyond* watching games. It is about reclaiming connection, identity and hope in a world starved of all three.

Where else would you find a lifelong New Yorker celebrating with a Gen Z newbie fresh off the L train?

WNBA
Edition

Network Effect

Launched at the Home of the Reigning WNBA Champions, New York Liberty

Change is in the Air

Movements don't begin with budgets or media rights. They begin with fans who show up before the spotlight, turning belief into culture.

A Defining Decade Ahead

The Americas are entering a defining era for sport. Over the next decade the region will host the FIFA World Cup in 2026, the Women's World Cups in 2027 and 2031, the 2027 FIBA Women's Basketball World Cup, and the LA28 Olympics. In the U.S., 160 million people engage with live sports — *but how they engage is transforming.*

Playing Outside the Lines

The defining moments in sport now stretch far beyond the scoreboard, fueled by fashion crossovers, athlete activism and the embrace of women's sports. Synthesis' analysis of billions of fan signals over the past three years confirms the cultural center of gravity is shifting.

Shifting the Spotlight

The WNBA is breaking attendance records. The MLS and NWSL are bringing in new and diverse audiences. Women's sports are growing faster than most men's leagues. Fandom is being rewritten.

The Challenge for Brands

What if your playbook expired seasons ago? The next era of fandom isn't forming in the places you've always looked. While brands double down on familiar tactics, fans are creating new arenas of loyalty through women's sports, athlete activism, and cultural crossovers.

The opportunity is clear: evolve with them, or risk being sidelined from the culture they're building.

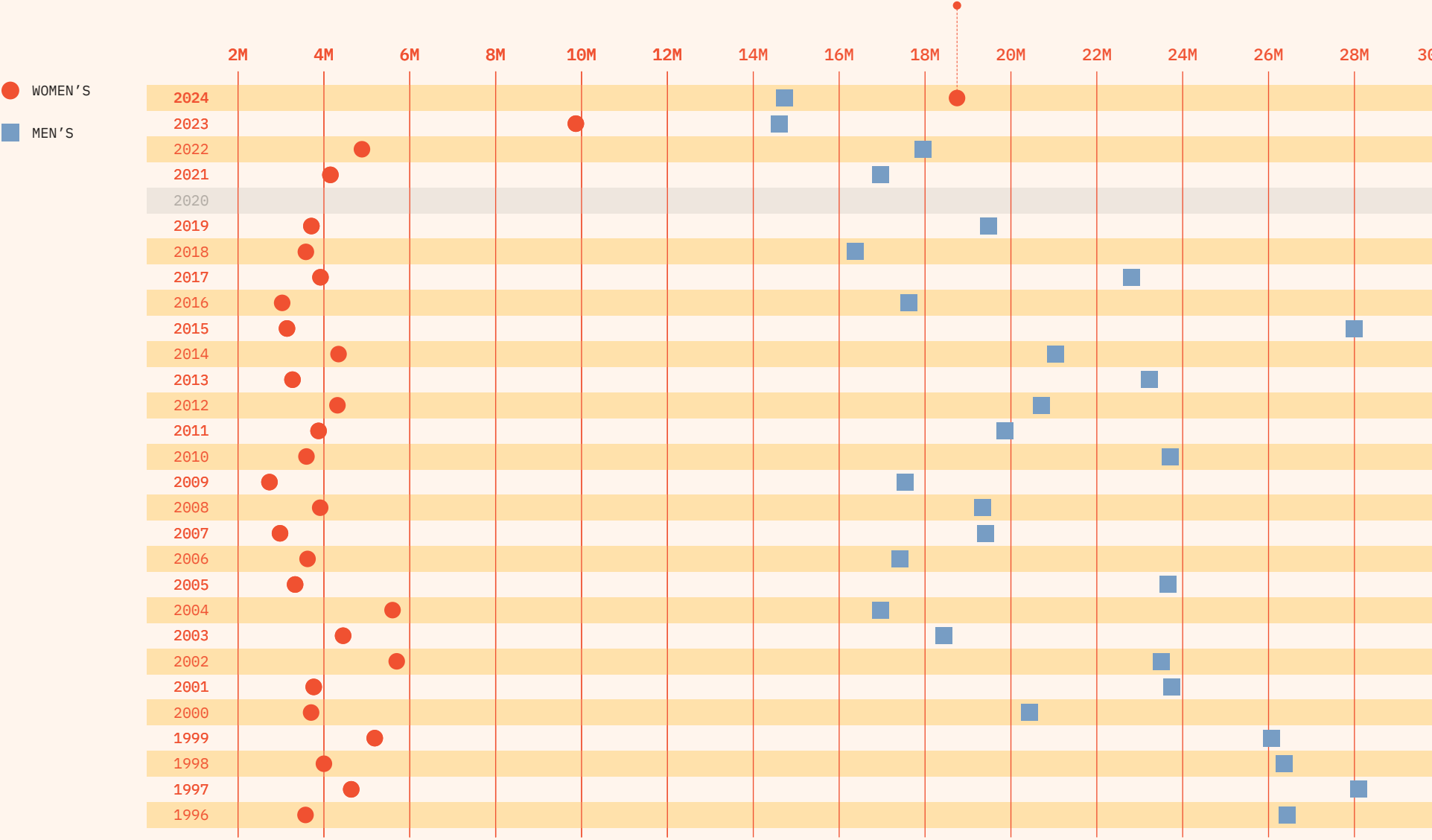


Fandom in *transition*, in one chart.

Average Viewership of College
Basketball Championships

Fandom is evolving, fast.
Brands that stake a place
today will define, build and
shape culture tomorrow.

Women's basketball is a powerful example of fandom in transformation. The 2024 women's NCAA championship drew a larger audience than the men's title game– a historic first. The WNBA was named the fastest-growing brand in the U.S. (Ben & Jerry's came second). And this season, the league shattered a 23-year-old attendance record. **The brands winning big today backed players' stories early. Their foresight turned into outsized rewards as the WNBA's momentum is exploding.**



Source: Sports Media Watch; ESPN Press Room | Graphic: Synthesis



Expanding Entry Points to Sport

▲
FROM

TO
▼

From gladiator arenas to Super Bowls, sport's pull has always been the spectacle, but only if you were there to witness it. Today, the stage has multiplied. No longer confined to what's happening in the stadium, spectacle plays out across **three dimensions**:

Cultural Spectacle

The entry point into sport isn't the field anymore. You don't have to play, or even watch live, to belong. Today, fandom spreads through culture: spin-offs, collabs, causes, and stories that travel far beyond the game.

Experiential Spectacle

As sport grows more data-driven and risk-averse, fans look beyond the court for theater. Engineered for drama and built to be shared, live in-stadium experiences restore unpredictability and keep attention alive between plays.

Spectacle in Renewal

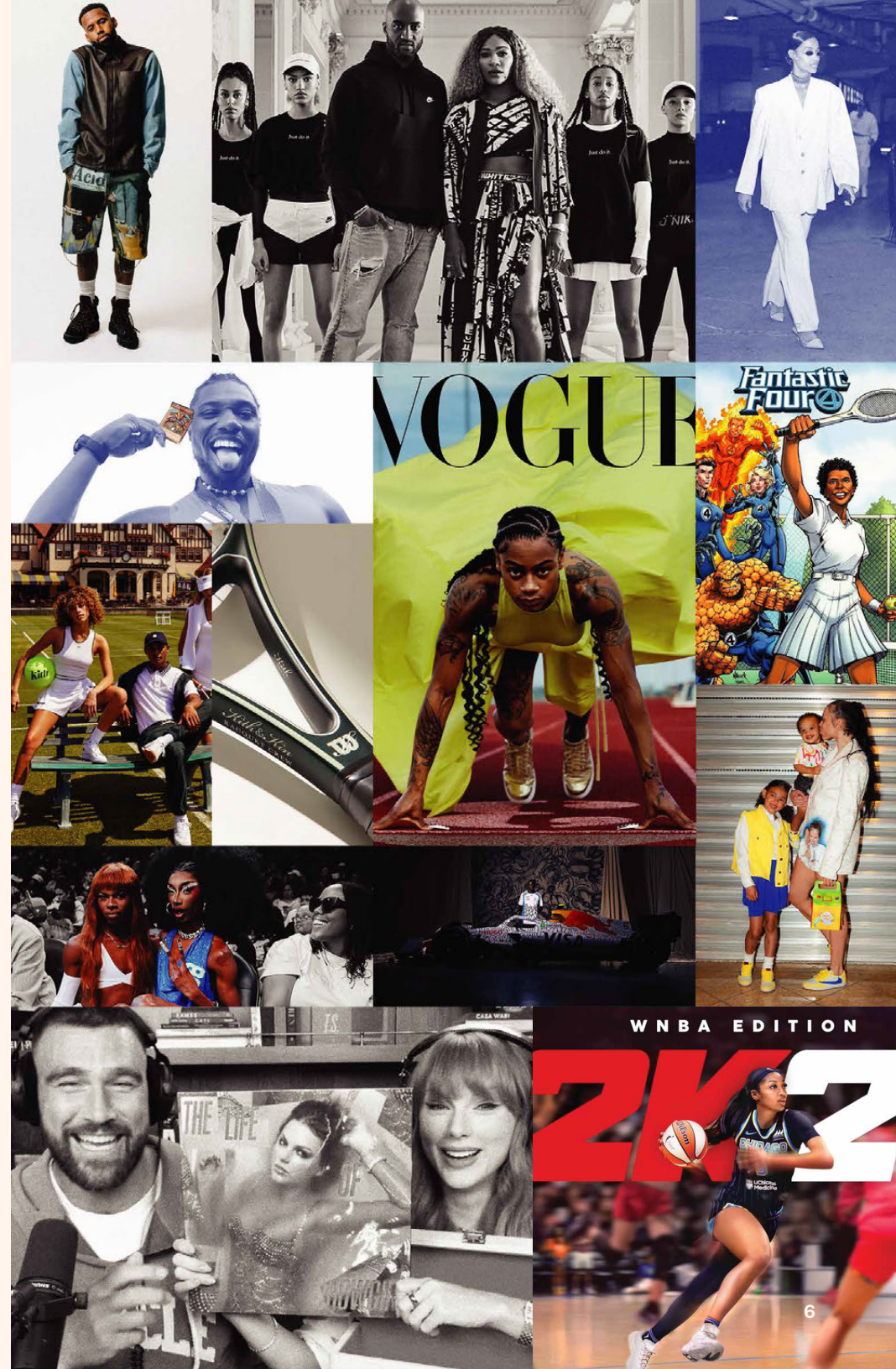
Renewal is where sport loosens its edges, adapting to the attention economy with fresh rules, new formats, and faster pacing that put drama back at the heart of play.

Formula 1 shows what happens when all three align: cultural storytelling through *Drive to Survive*, glamorous live experiences and concerts, and format tweaks like city night races that transformed a niche sport into a pop culture force and drew a new generation of fans.

**SPORT IS A
*CULTURAL SPECTACLE.***

The game is only one chapter in a story that unfolds through fashion, music, art, gaming, and identity — giving fans a thousand new ways in.

Today, attention concentrates in the off-court stream. Tunnel fits turn hoopers into fashion icons. Formula 1 cars double as canvases for contemporary artists. Taylor Swift may have sparked the headlines, but Travis and Jason Kelce's *New Heights* cashed in — 5.5M views in 24 hours shows how sports platforms can outpace traditional media in shaping culture. 2K video game title covers are status symbols. Even discovering which Yu-Gi-Oh! card Noah Lyles has taped to the back of his bib has become as iconic as his fastest races.



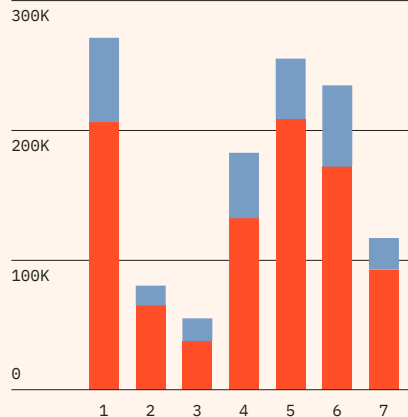
**SPORT IS AN
EXPERIENTIAL SPECTACLE.**

As elite sport grows more analytical and risk-averse, unpredictability has faded — reflected in slipping NBA, MLB, and NFL viewership. Fans and leagues are now engineering new drama, filling pauses with rituals and attention spikes as entertaining as the game itself.

The NBA's In-Season Tournament re-energized mid-season play with bold courts and live DJ sets. The Tour de France Femmes turned mountain stages into rolling festivals of music and food that pulled in crowds new to cycling. And in Sacramento, Kings fans chant "Light the Beam!" after every home win, firing a purple laser into the night sky and transforming victory into a civic ritual.

“While it’s been driven by optimization and winning, the way the game has changed has been detrimental to fans and to the entertainment value of the game”

Theo Epstein
MLB Executive

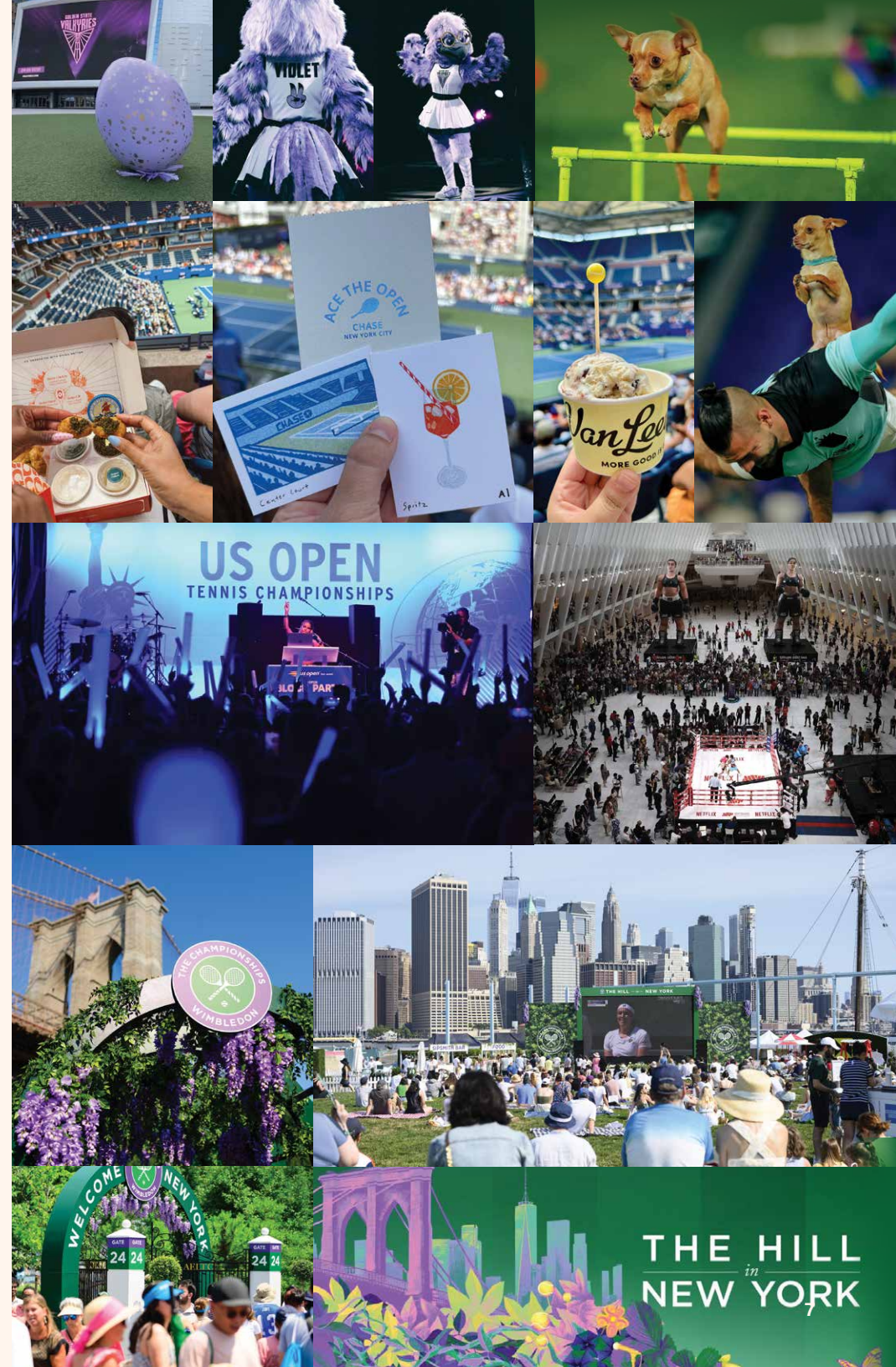


1. AMERICAN FOOTBALL
2. BASEBALL
3. BASKETBALL
4. COMBAT
5. SOCCER
6. WOMEN'S BASKETBALL
7. WOMEN'S SOCCER

Hardcore: Audiences who engage with match-specific content e.g. analytics, match breakdowns etc.

Casual: Audiences who primarily engage with culture

Source: Synthesis



SPORT IS A SPECTACLE IN RENEWAL.

Affinity grows fastest when sport adapts to where fans already are. New and reimagined formats are loosening the edges of legacy play: faster pacing, fresher rules, and built-in entertainment value. That renewal creates fertile ground for brands to embed fan-side activations directly into the game.

The US Open's Mixed Doubles has become a star-driven spectacle with crossover appeal beyond tennis purists. Unrivaled's player-owned basketball league puts athletes in control, blending curated fan experiences with equity. Unrivaled salaries averaged \$220,000+, exceeding WNBA norms. Even MLB has drawn bigger crowds since pace-of-play reforms made games more watchable, driving a 9.6% increase in attendance from 2022 to 2023.



How Brands Tap into the Triple-Spectacle

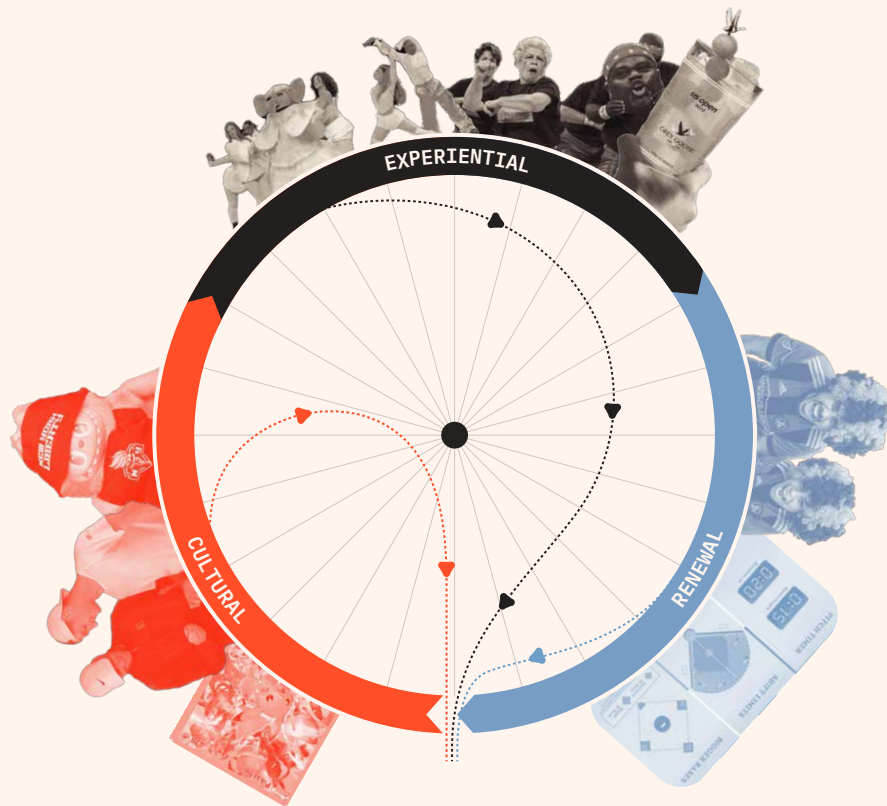
Sports fandom has exploded outward, pulling fashion, music, gaming, travel, parenting, feminism into its orbit — each drawing in new energy, diverse fans, and fresh ways for brands to matter. The game is no longer the center of gravity; culture is.

For brands, ignoring these layers is a risk. Every dollar spent without this lens risks irrelevance.

At best, you're shouting into a void. At worst, you are fanwashing and alienating the audiences you need to grow.

The **Triple-Spectacle model** isn't optional; it's your playbook for staying in the game. Culture pulls fans in, live experiences hold them, and renewal keeps the game alive. Miss one, and you're outpaced by those who don't.

Mapping the landscape reveals where growth is real: which audiences (women, Hispanic fans, Gen Z) are shifting the center of gravity, and which partnerships — athletes, platforms, creators — can pull your brand into their orbit.



Cultural Spectacle

Treat Culture as Core Inventory, not an Add-On

The whole athlete - their passions, values, playlists, fashion, and off-court crossovers are the new “culture rights”, and they live beyond the leagues.

Think the ATP partnership with TikTok - giving tennis fans exclusive behind-the-scenes access to tennis stars.

Experiential Spectacle

Turn Downtime into Showtime

Pauses are prime time, where fans make moments replayed long after the final buzzer. Brands win when they make those breaks unforgettable.

Think Big Ellie commanding the fourth quarter, or Sacramento's “Light the Beam” ritual sparking city-wide celebration.

Spectacle in Renewal

Reward Game Behavior

Brands can turn every play into shared stakes by linking in-game moments to real-world rewards.

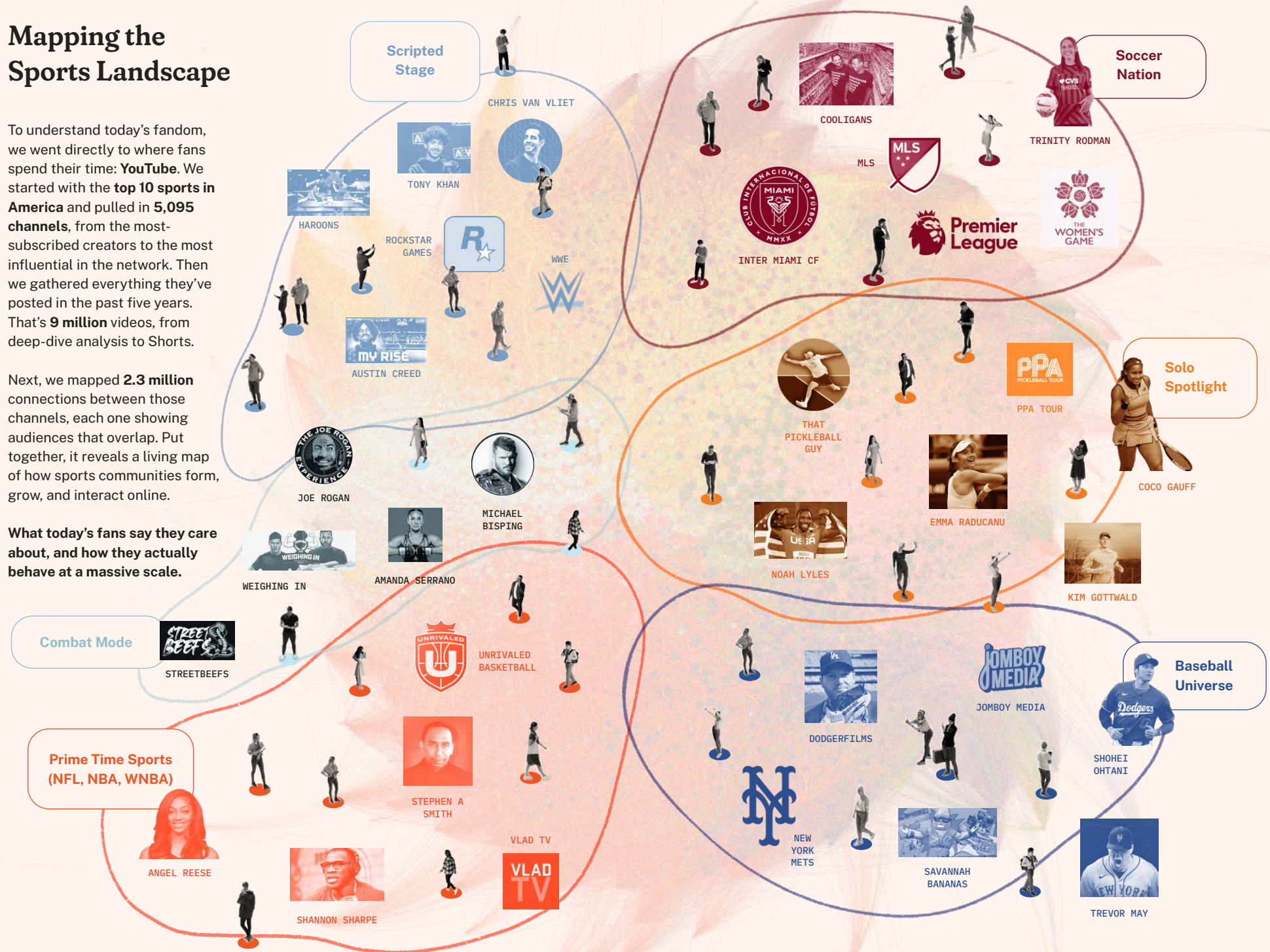
Think ‘Go For Dos’- Dos Equis’ campaign that sparked tailgate rituals and social buzz keeping College Football fans engaged well beyond the field.

Mapping the Sports Landscape

To understand today's fandom, we went directly to where fans spend their time: **YouTube**. We started with the **top 10 sports in America** and pulled in **5,095 channels**, from the most-subscribed creators to the most influential in the network. Then we gathered everything they've posted in the past five years. That's **9 million** videos, from deep-dive analysis to Shorts.

Next, we mapped **2.3 million** connections between those channels, each one showing audiences that overlap. Put together, it reveals a living map of how sports communities form, grow, and interact online.

What today's fans say they care about, and how they actually behave at a massive scale.



CHANGING THE GUARD

Legacy power still holds, but momentum is uneven. NFL viewership slipped 2% in 2024, yet it remains a dominant fixture on the TV calendar. NBA regular-season numbers also dipped slightly, while MLB's attendance climbed after pace-of-play reforms. Audiences across all three remain steady but aging and growth is slowing.

At the same time, rising leagues are accelerating and rewriting sports growth. WNBA audiences are up 21% year-over-year, with viewership surging 170%. MLS set an all-time attendance record in 2024 and locked in a \$2.5B rights deal with Apple. The NWSL's new multi-partner media agreement signals a shift toward platform-native distribution and new modes of fan engagement.

For brands, the takeaway is clear, early investment matters. Anticipate assimilation from incumbents, position for growth, and the opportunities to connect with passionate fans will endure, regardless of which league makes the headlines first.

Brand Takeaways

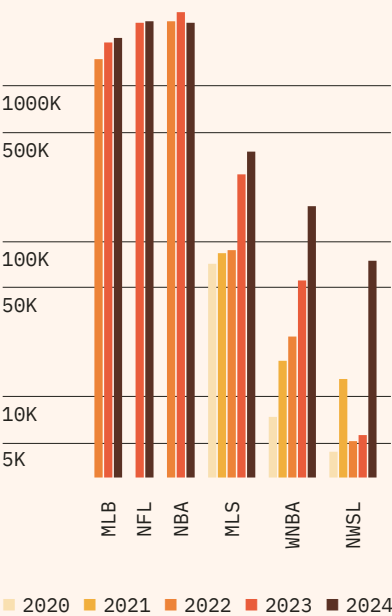
Get in early while the opportunity is undervalued. The WNBA, MLS and NWSL audiences are growing; early supporters capture brand love before mainstream adoption drives costs up.

Leverage the compounding streaming boom – Media expansion amplifies reach, turning early investments into outsized reach.

"It's absolutely [true] that the analytics have taken teams in certain directions. Coaches and general managers are paid to win at all costs are not necessarily focused on the aesthetic appeal of the game."

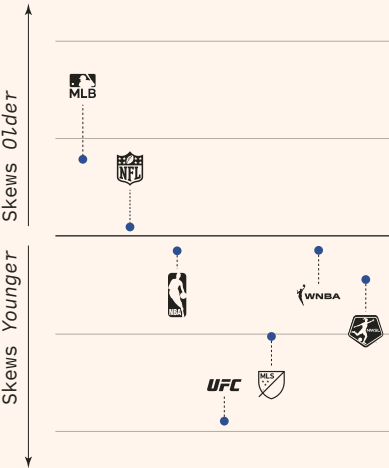
Adam Silver
Commissioner of the NBA

YouTube Sports Audiences: Median Viewership



Source: Synthesis

Sports that tap into the Triple-Spectacle attract a younger audience



SOCCER: FROM IMPORT TO *IDENTITY*

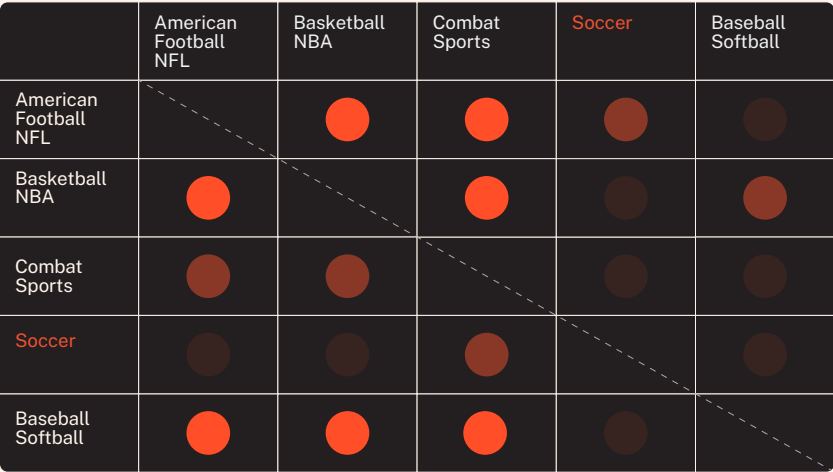


Source: ESPN

Soccer in the U.S. is evolving beyond its international origins. It now thrives with a domestic following rooted in younger, more diverse crowds. Fan culture is hyper-local: marches, tifos, bilingual chants, and player-led causes. It's democratic, accessible, and proudly fan-driven. The difference between watching greatness and helping create it.

The English Premier League, once dominant, has slipped. NBC Sports' average EPL viewership recently hit a three-year low, down 7% year-on-year. Meanwhile, American clubs are reshaping the game at home. Angel City FC directs funds into community programs. Vermont Green FC ties every match to environmental action. This is soccer as civic pride, where belonging matters as much as the score.

Soccer isn't overlapping with other sports audiences.



OVERLAP: ● HIGH ● MEDIUM ● LOW

Source: Synthesis

Brand Takeaways

Do: Back the people and values fans built

To win with Hispanic audiences, invest where fútbol already lives: tifos, murals, drumlines, and community-led storytelling. Make Spanish-first content central, and back neighborhood initiatives so the community carries the brand story.

Women's soccer fandom connects deeply with WNBA through values, style, and community culture. Treat them as a shared ecosystem — amplify rituals, cross-league player stories, and moments that resonate across both audiences.

Avoid: Betting only on imported icons

Big-name signings may spike ticket sales but rarely build cultural equity. Chasing the Messi moment while overlooking the MLS or NWSL striker who's sustained supporter culture for years misses the point, and the loyalty.

MORE THAN A MOMENT: WOMEN'S SPORTS TAKING CHARGE

Women's sports are building a movement. WNBA Finals average 1.6million viewers, more than double the 2023 figures. The NCAA Women's Basketball Championship hit a record 18.9million, outdrawing the men's final. And TV viewership of women's sports overall surged 131% in 2024, with ad effectiveness rising 56% year-over-year.

What's driving this isn't a single star. It is women showing up for women. Athletes amplifying each other. Creators telling authentic stories. Fans turning support into ritual. Media and attendance growth follow because culture leads. Every move builds momentum, creating a flywheel where each game cultivates community and each fan feels like they are writing the next chapter.

Brand Takeaways

Do: Amplify the bonds that fans cherish

Spotlight mentorships, cross-sport friendships, and community-driven rituals in campaigns. Celebrate athleticism and sisterhood, and equally women lifting each other up.

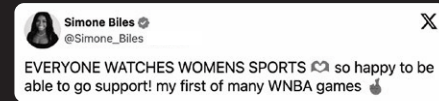
Do: Create spaces where generations connect

Highlight legacy like alumni returning with daughters, parent-child game traditions, rituals that connect yesterday's heroes with today's stars. Good storytelling helps fans see themselves in the movement.

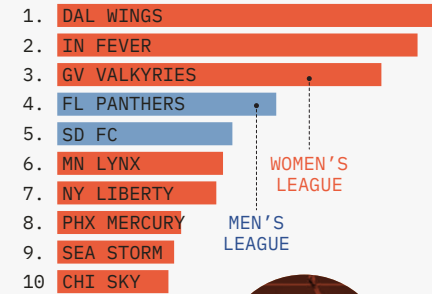
Avoid: Hijacking player bonds

Fans connect to authentic player bonds. Don't drown them out with brand scripts or staged activations. If the dynamic doesn't exist naturally, don't manufacture it.

Source: Synthesis, Sports Business Journal



Teams with Most Social Media Follower Engagement



MEDIAN VIDEO VIEWS

500K

400K

300K

18.9 MIL PEOPLE TUNED IN

100K

2020

2021

2022

2024

GROWTH OF VIEWS AND ENGAGEMENT IN WOMEN'S SPORTS ON YOUTUBE OVER P5Y

MEDIAN VIDEO ENGAGEMENT

6K

4K

2K



The Courtside *Renaissance*



“This is not just basketball-endemic brands coming to life. This is an amazing intersection of sport, culture, fashion, music, technology, and I don’t think there’s any league that can bring those facets of an ecosystem of business together like the **WNBA** can.”

– Phil Cook, CMO at the WNBA

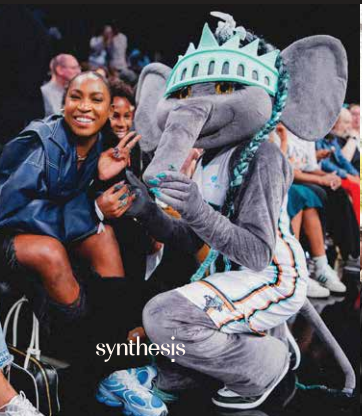
Source: Sports Business Journal

The WNBA is more than basketball. It's culture, community, and celebration happening courtside. The lines blur fast: is it a block party, a concert, a game?

Fandom is performance. Spike Lee in the front row. Coco Gauff across the aisle. Lana Ja'Rae on the Fenty Gloss Bomb Cam. In the stands, teens screaming for Sabrina Ionescu like she's Taylor on the Eras Tour. Ellie the Elephant greeting the crowd like it's her house, and bringing friends. Every moment is built to be seen, styled, and shared.

It's loud. It's queer. It's Black. It's multigenerational. And it's what the future of fandom looks like: expressive, inclusive, and impossible to ignore.

**How will your brand
belong in this future?**



WNBA IS A MASTERCLASS IN ENGINEERING ENERGY.

Every beat is built for engagement. Shorter quarters, a lighter ball, and smaller rosters keep tempo high and players familiar.

Even "breaks" are programmed: fans stay in their seats for the Timeless Torches or the fourth-quarter Ellie Stomp.

At home, audiences follow high-impact micro-stories — a walk-out dance, a rivalry flare-up, a clutch 3-pointer — without needing to track the full game arc. Drama and action flow straight into feeds, carrying the energy beyond the arena.

Brand Takeaways

Do this:
Sync with the league's rhythm.

Join or create moments that match the pace like fan-triggered rituals, quick-turn AR overlays, or branded edits that hit social before the next whistle. If it slows the energy or feels bolted on, it won't last a quarter.



WNBA is a Cultural Spectacle.

The WNBA spotlight shines just as brightly off the court. Players are style icons. Fans dissect friendships, love life and “shipping” with as much passion as the box score.

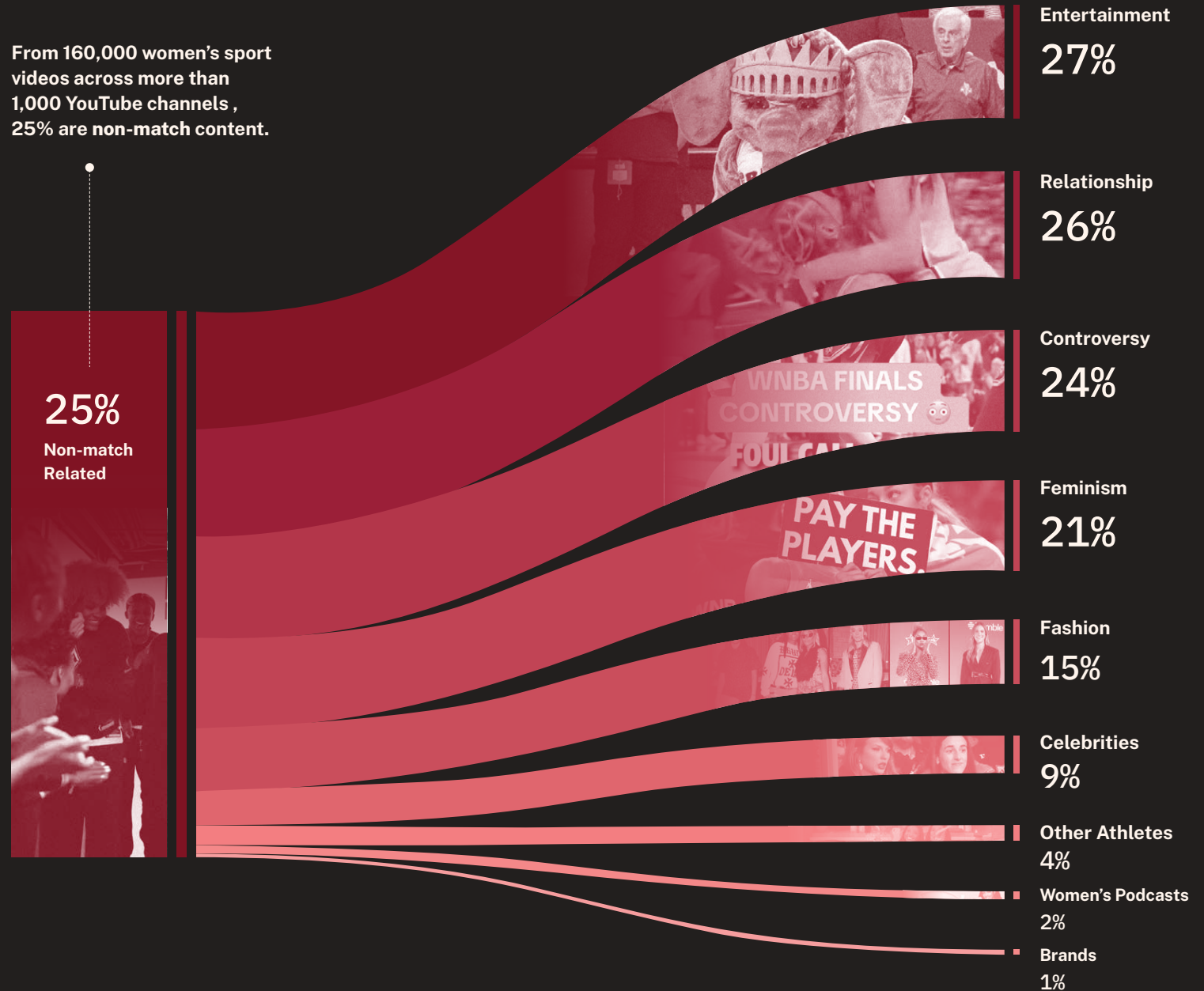
Halftime shows, dance crews, and mascot reveals like the Golden State Valkyries’ Violet the Raven — who dramatically hatched from an egg — create moments built to be shared. Podcasts such as *Unapologetically Angel* and *Attacking Third* give audiences inside-access to the stories that matter.

Rivalries spark viral conversation, and debates around pay and equality ripple across the league. Yet beneath it all, athletes flip the script: they champion one another, stand up for shared values, and foster real community.

Once mired in one of the WNBA’s fiercest rivalries, Breanna Stewart and A’ja Wilson now lead with respect. Wilson dismissed media spin, saying, “It’s not beef... we’re making each other better every single possession”. Joy, friendship, and connection resonate as powerfully as competition.

**Come for the rivalries,
stay for the sisterhood.**

From 160,000 women’s sport videos across more than 1,000 YouTube channels, 25% are non-match content.



Among the 25% of non-match related content, topics breakdown into the following:

FROM THE GROUND UP

Repping the W is a badge of cultural awareness, proof you saw it before the world did.

This IYKYK community built the league's early momentum: filling arenas when coverage lagged, boosting players on socials before brands did, cutting their own highlight reels, launching podcasts, and keeping the story alive when mainstream media looked away. They guard that energy fiercely.

Brand Takeaways

Don't parachute in for the photo-op.

Stand with the people who made this possible by funding their platforms, co-creating with their leaders, and giving them the tools to keep growing the league's story, on their terms.



PLAYERS ARE THE ATTENTION ENGINE

A League of Many Faces

While Caitlin Clark has become a cultural flashpoint and media magnet, the WNBA's momentum runs deeper. A'ja Wilson pairs MVP dominance with a fashion presence that owns tunnel walks and fashion magazine covers. Angel Reese brings unapologetic confidence that fuels headlines and debate. Paige Bueckers commands national attention with her skill and charisma.

Together, these players create a chorus of voices and personalities that pull the league into new cultural spaces.

The Liberty exemplify what happens when on-court excellence meets off-court magnetism.

Natasha Cloud's fearless advocacy resonates as deeply with fans as her "What Bag Did Stewie Bring Today?" Instagram series. Sabrina Ionescu's sharpshooting and crossover moments with NBA stars draw in new audiences. Breanna Stewart's behind-the-scenes content on YouTube gives fans a window into the life of a champion. In the Liberty's rise, you see the power of player-driven brand building in action.

Brand Takeaways

Do: Invest in the ecosystem of personalities and give a platform for emerging talent.

Mix up MVPs, rookies, locker room leaders and style icons. Build partnerships that celebrate individuality and extend influence into the spaces where culture is being shaped.

60%

of the Top 10 Affinity IG accounts are **star players**, surpassing WNBA official and teams.

Source: Synthesis

What Now?

In a time of uncertainty, Americans are turning to sport. Fandom is evolving, and brands have a chance to connect, inspire, and lead culture.

Fans are participating in communities, rituals, and cultural moments that extend beyond the game. Sports provide a stage where identity, creativity, and shared values intersect, and brands that recognize this can move from being observers to active participants in fandom.

Winning in today's landscape requires attention across three dimensions of the Triple-Spectacle Model:

Cultural Spectacle

Connect beyond the field. Highlight athletes' passions, off-court creativity, and lifestyle influence. Engage in ways fans already care about: fashion, music, social causes, and storytelling that travels far beyond the game.

Experiential Spectacle

Build rituals, surprise activations, and immersive live experiences that fans want to relive and share, whether in the arena or online.

Spectacle in Renewal

Keep the game fresh and unpredictable. Embrace new formats, rules, and reward systems that encourage fan participation, embed brands into the flow of play, and spark excitement across generations.

Brands that activate across all three dimensions earn **trust, loyalty, and relevance**. Those who wait risk being sidelined, as fans create new arenas of engagement.

Welcome to synthesis

We help future-proof
business by making
sense of the world's
data.

We are a creative data
consultancy, experts in defining
your audience and how their
needs will evolve in the short
and long term.

We plot **growth pathways** for
brands by mapping now, next,
and future audiences, using
millions of behavioral data
points to track how real
behavior changes over time.

Once we've identified priority
audiences, we build **deep
empathy** by analyzing
thousands of videos and posts
from authority nodes in the
network. This reveals what unites
and divides them, so brands know
exactly how to connect — and
with which creators and partners.

We've partnered with **Liberty
Media** to grow the next
generation of **Formula 1**
audiences; with **Netflix** to chart
global fandom pathways for
Korean content and anime; with
YouTube to launch Shorts; and
with **John Elliott** to expand into
new verticals.

ANALYSIS & WORDS

Hollie Jones
Lana Allen
Lee Fordham
Xiao Shuang Na
Linnah Tan
Dajou Cottrell
William Pratt

CREATIVE & INFOGRAPHICS

Sophia Sena
Nicole Tan
Jace How
Eleni Tecos



If you're looking to propel your brand
into the future and grow beyond the
fans you know, **reach out.**

We're a curious, culturally attuned,
straight-talking partner who cares
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