

CANVAS  
WORLDWIDE

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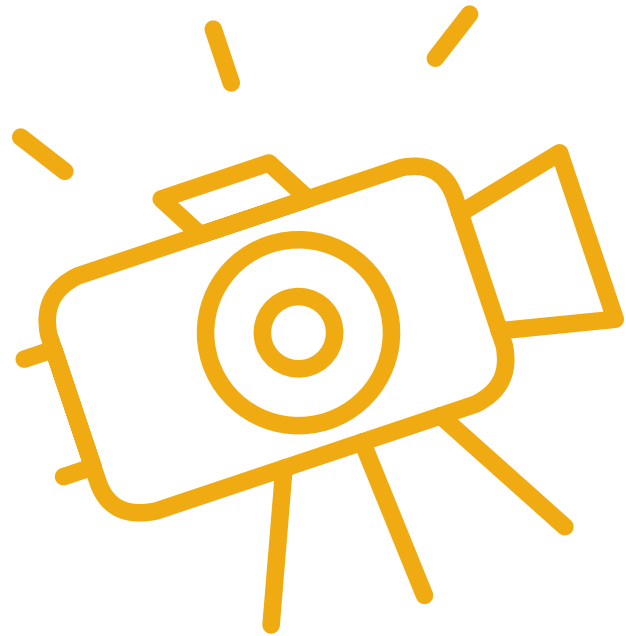
Brand  
INNOVATORS



# THE FANDOM ADVANTAGE



**HOW FANDOM BECAME MARKETING'S  
MOST POWERFUL GROWTH ENGINE**



**A NOTE FROM THE MANAGING EDITOR**  
**PAUL WOOLMINGTON**

# A seat at the table



**M**

y passion for sports started with Arsenal. And I have continued to support the club for fifty years! I can't express my excitement over we uniting as one to win the English Premier League title after having come in second three years in a row prior.

Yes, I said "we."

I may not be taking the field physically with Arsenal's fantastic

players. But personally, emotionally, existentially, religiously, I'm with Arsenal for every pass, every sprint, every header, every goal, every set piece, every kick. No matter the state of play, every sports fan knows what I'm talking about.

It started when I was a small boy living in a variety of African countries. Arsenal was beloved across the continent. My



Arsenal are crowned the Champions of the Premier League for the 2025/26 Season, after the Premier League match between Crystal Palace and Arsenal at Selhurst Park on May 24, 2026 in London, England. (Photo by Michael Regan/ Getty Images For Premier League)



grandparents lived in London, close to the team's stadium. Our shared fandom brought me closer to them, despite the thousands of miles distance.

My father, a brilliant academic, had little interest in sport, but, when I was six or seven, my mother baked me a birthday cake and iced the Arsenal gunners crest into the frosting and my father shared our enthusiasm as we celebrated. I remember it as one of the happiest moments of my early life. Arsenal brought me and my father closer together in that moment, despite the distance in interest.

I am an only child. I have always had to find a seat at other people's tables. Arsenal gave me an extra chair at one of the most welcoming tables in the world. I never left that seat.



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This year, after 22 years of waiting, my club finally won the Premier League title again. The club's message to its fans worldwide was simple: This belongs to all of us.

A week later, we lost the Champions League final in Budapest on penalties — 1-1 after extra time, with the decisive miss falling to Gabriel Magalhães (aka "Big Gabi"), the heart and soul of our defense. It was the cruelest possible end; and it was the second European final we lost. The first was 20 years ago.

In sport, as in life, there is only one winner. But losing has its own power. It reinforces the bonds. It deepens the family.

What followed at the end of May was extraordinary. Arsenal's trophy parade through north London drew an estimated 1.5 million people. The Metropolitan Police called it >

the largest parade ever held in the country, according to The Guardian.

People came from everywhere. There were hijabis marching down Holloway Road wrapped in flags. There were Colombians in Clissold Park with cool boxes. There were Black Londoners at the front of crowds, as the Guardian's reporter put it, "in a way rarely seen inside a Premier League football ground." There were young fans wearing the shirts of the 2004 Invincibles, a team these young fans have no memory of. But as with all sports, there's the way the force of history meets the force of the moment. As one younger Arsenal devotee from south London explained his presence, "Everyone's looking for a bit of happiness."

That is fandom. It's not about the trophy or a parade. The one and a half million people who came out for a team that had just lost a final, to celebrate one that had won a title twenty-two years in coming. The Kroenke Sports Group — Stan and Josh Kroenke — now have championship trophies across their portfolio: the Rams, the Avalanche, the Mammoth, the Nuggets, and now Arsenal. But the deeper story is what the parade revealed about what these clubs represent to the communities who love them.

Like you, I keep many teams in my heart. The New York Yankees



Donovan Mitchell #45 of the Cleveland Cavaliers drives around Karl-Anthony Towns #32 of the New York Knicks during the second quarter in Game One of the NBA Eastern Conference Finals at Madison Square Garden on May 19, 2026 in New York City. (Photo by Sarah Stier/Getty Images)

and the Los Angeles Rams, to name two more, represent something ineffably personal to me. Every game is imbued with meaning, from the plays to the players to the stadiums and the fields decked with logos. Watching these teams creates indelible moments, whether it's a make-or-break match-up or not. But when a team you love is in a fight for the championship, everything takes on a new depth of feeling, color, and importance.

Speaking of the long arc of the passionate, I was acutely aware of those powerful emotions watching, along with so many long-suffering NY Knicks fans, the team's stunning performance during the

playoffs. I shared the collective ecstasy with some 20,000 other Knicks fans at Madison Square Garden in April when the Knicks' dominance was on full display.

This sensation of feeling the potency of the Knicks morphing into what The Athletic dubbed "a superteam" comes with the pent up hopes of knowing it's been over 25 years since these men in orange and blue last made it to the finals; hell, the franchise's second and most recent NBA championship was in 1973. That says something about the enduring spirit of fan passion, and the possibility of game-changing history that feeds our individual and communal obsessions.

I share my reverie not to celebrate (though I am, joyously, exuberantly). Rather, I want to make a point that sits at the heart of this report.

In last year's edition, we wrote about sport as something close to a modern religion, a space where shared ritual creates meaning — a commodity that is even more precious in this era that has dismantled so many of the older sources of meaning. This year's



If sport is the cathedral, fandom is the congregation. And what our research and interviews reveal, repeatedly, is that the congregation has become the most valuable asset in the entire sports economy.

report extends that argument into the realm of fandom. If sport is the cathedral, fandom is the congregation. And what our research and interviews reveal, repeatedly, is that the congregation has become the most valuable asset in the entire sports economy.

Arsenal counts roughly 435 million fans worldwide. Around 114 million follow the club across social platforms. The club is searched 22 million times a month, with our largest followings outside the UK in the United States, Indonesia, and Brazil.

The Arsenal Women's team, which I also follow avidly, has seen its average home attendance grow nearly tenfold in four seasons, with crowds of more than 56,000 for matches against rivals. These numbers describe a community, not merely "an audience." That distinction is the entire subject of what follows in this report.

Mikel Arteta, Arsenal's manager, said something over six years ago that I keep returning to. "If you don't have the right culture, in the difficult moments the tree is going to shake. My job is to convince everybody that this is how we are going to live." That was about building a football team (okay, U.S. readers, "soccer"). But it applies just as cleanly to brands, broadcasters,



and properties trying to build durable fan relationships in 2026.

The fandom I belong to lifts me, heals me, frustrates and infuriates me — sometimes in the same afternoon. It is a constant. It knows no borders. I have shared knowing nods with kindred spirits in airports from Cape Town to Seoul to Los Angeles. My friend group chats are knowledgeable, impassioned, and, yes, bonkers; there's no hierarchy, all fans welcome.

This is the third edition of the Canvas Worldwide and Brand Innovators State of Sports Marketing report. Our earlier editions traced the Americanization of sport and sport's emergence as a kind of secular religion. This one explores what it means to build for the passionate sports fan who never leaves the stadium.

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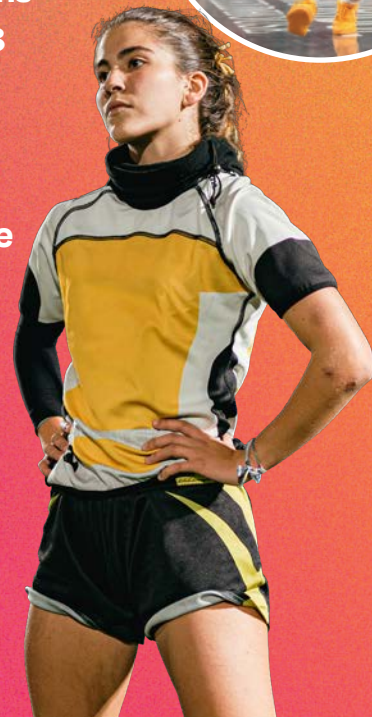


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# Welcome



The summer of 2026 is delivering one of the densest concentrations of sports tentpoles in recent memory. The FIFA World Cup arrives in June and July — what Ravi Kandikonda, Chief Marketing Officer at Zillow, describes as “13 Super Bowls happening over a concentrated period of time” —followed by a calendar that runs through the Women’s World Cup cycle and toward the LA28 Summer Games.

For brands, broadcasters, and sports properties, these moments serve as eye-opening test cases for a thesis that has been building across the industry for years: that fandom, not audience, is the richest asset.

Grasping the distinction is crucial. Audiences are rented, they are temporary, their attention, ephemeral. But fans! Fans are cultivated, their attention, constant, and long-lasting. So while audiences deliver impressions; fans deliver advocacy, loyalty, and durable lifetime value.

In a media landscape defined by fragmentation, cord-cutting, and the steady erosion of appointment viewing, tentpole sporting events have become one of the few remaining contexts where massive audiences gather simultaneously and pay attention. And the savviest operators in the space have recognized by now that this is a rich opportunity, measured not only in immediate capture, but, more importantly, in the fan-driven activity that continues before and after.

This report examines how three constituencies — broadcast and streaming platforms, brands, and sports properties — are approaching this new era as both opportunity and inflection point. Drawing on original executive interviews and proprietary research, this report aims to reveal how the relationship between fans and the entities competing for their attention is evolving dramatically. The theme is consistent: *those who treat fandom as a long-term investment rather than a transactional exchange are building competitive advantages that compound over time.*



**CANVAS**  
WORLDWIDE



# THE FANDOM IMPERATIVE

The case for fandom begins with one seemingly obvious observation: fans spend more time, more money, and more emotional energy than casual viewers. >



What's more, the data increasingly suggests that those differences compound, creating what Deloitte's 2026 Digital Media Trends report calls "fandom lifetime value" — the long-term economic potential of an individual fan and the communities they belong to.

Numbers reveal the comparative value of fans to casual viewers. According to Deloitte's survey of U.S. consumers, fans spend 51 more minutes per day with media and entertainment than non-fans — a 16% premium. They subscribe to more streaming services (an average of four versus three) and spend more on them (\$71 per month versus \$56). Three-quarters of fans are gamers, compared to about half of non-fans, and they are nearly four times more likely to subscribe to paid gaming services. Fans use more social networks too: an average of six versus four. They

drive the economics of the industry.

The differences extend beyond consumption. Fox Sports' "Fans Have More Friends" research, conducted across the network's portfolio, found that high-value sports fans report having an average of 35.6 friends, compared to 21.1 for non-fans. They are more than twice as likely to describe

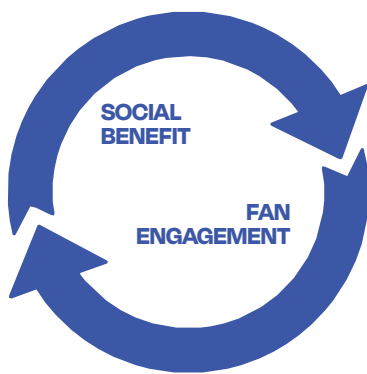
themselves as "very happy" (34% versus 16%) and significantly more likely to say they "feel close to people" (61% versus 37%). Fandom, the data suggests, goes beyond mere media behavior; it supplies a social architecture that creates connection, identity, and belonging — and the long-term benefits that arise from that.

"There are generally three things you can talk about with strangers: politics, religion, and sports," says Zillow's Kandikonda. "Two of those are deeply divisive. Sports is the unifying element brands can lean into. It brings people together in a way nothing else does."

The unifying power Kandikonda describes is hardly theoretical. When Arsenal paraded the Premier League trophy through north London at the end of May, the Guardian captured the diversity of who showed up: hijabis with flags

## THE FAN FLYWHEEL

From Fox Sports' "Fans Have More Friends" research



## FEATURED



**Ravi Kandikonda**  
CMO, ZILLOW GROUP



**Jaime Weston**  
FIRST COMMISSIONER OF MAJOR LEAGUE VOLLEYBALL



**Jeff Collins**  
PRESIDENT OF ADVERTISING SALES, MARKETING, AND BRAND PARTNERSHIPS AT FOX CORPORATION



The Dallas Pulse defeated the Omaha Supernovas in the 2026 Major League Volleyball Championship on home court in their first year as a franchise.

around their shoulders, Colombians with cool boxes in Clissold Park, Black Londoners at the front of crowds in massive, exuberant numbers. Three generations of fans, including young supporters wearing the shirts of a team that won the title before they were born.

That is the function sports performs in a fragmented culture — and the asset brands and broadcasters are positioned to either honor or squander.

The observation echoes the thinking of athletics philosophers like legendary sportscaster Bob Costas, who has waxed poetic about sport’s place in American life — that it functions as a kind of secular communion, gathering people who otherwise share little common ground around a single screen, a single team, a single outcome. In a fragmented media culture, that gathering function has become commercially priceless precisely

because so little else delivers it.

“Fans want to feel connected to something bigger than themselves, and to feel they have a personal connection to it,” says Jaime Weston, the first Commissioner of Major League Volleyball. “It also needs to be easily accessible.” Weston, appointed in March 2026 after a career that included senior roles in the NFL, brings to MLV a working theory of fandom built across multiple categories: >



**Jocelyn Monroe**

CHIEF MARKETING OFFICER OF THE NWSL’S KANSAS CITY CURRENT



**Sean Gilpin**

CMO, HYUNDAI MOTOR AMERICA



**Daniel Dao**

GLOBAL SENIOR DIRECTOR, STRATEGY & INTEGRATIONS EPICS, COCA COLA



that the underlying drivers are the same whether the sport is a century old or three seasons in.

This social dimension explains why shared viewing moments retain their power even as the broader media ecosystem fragments. Jeff Collins, President of Advertising Sales, Marketing, and Brand Partnerships at Fox Corporation, sees a flywheel effect at work. “The media landscape is quite fragmented now, which is making these times when people come together so much more important than ever before,” he says. The events themselves create shared experiences that fans want to discuss, debate, and relate with beyond the broadcast moment.



42% of global adults say they are likely to follow the tournament — a figure that extends well beyond core football/soccer enthusiasts.

Jocelyn Monroe, Chief Marketing Officer of the NWSL’s Kansas City Current, offers a similar insight from inside the fan’s experience. “Every sports fan comes to sports through a story,” she says. “The story of connection. Watching baseball with my grandfather was part of growing my love for sports. For many it’s the time spent with a parent or friend that sparks the love of a game. For some it’s the hatred of the team from the other side of town that inspires long-term support of one mascot over another.”

Underneath the rivalries, Monroe adds, “the stories of the athletes, legacies, and moments created on

fields across the world are what bring fans back to stadiums week over week. It’s what drives them to scroll and share highlights on social channels so they don’t miss a moment from any angle.”

The World Cup illustrates the dynamic vividly. YouGov research finds that 42% of global adults say they are likely to follow the tournament — a figure that extends well beyond core football/soccer enthusiasts. Pre-tournament buzz in the host nations is already running higher than it did at the equivalent point before the 2022 Qatar tournament. And the U.S. and Canada are unique among host countries >



in one respect: their soccer fans skew significantly younger than the general adult population.

Among U.S. soccer followers, 56% are under 35, compared to 30% of the general adult population. But the pattern extends well beyond soccer. Across categories — from women’s basketball to combat sports to volleyball — the audiences accelerating fastest are skewing younger, more diverse, and more cross-platform than the sports they’re joining.

“What makes this moment different is that we’re not treating the World Cup as a single event, we’re treating it as a catalyst,” says Sean Gilpin, CMO, Hyundai Motor



Brands like Hyundai, Zillow, Coca-Cola, and others have numerous options for sparking fan passion across a constant stream of major sports events.



America. “Everything we’re doing is designed to create impact that lasts well beyond the final match.”

Instead of focusing only on Hyundai’s visibility, the carmaker is focused on participation, Gilpin says. From youth camps that bring world-class training directly into local neighborhoods, to immersive experiences that reflect where fans actually live, play, and connect today, this approach reshapes how Hyundai thinks about sports marketing.

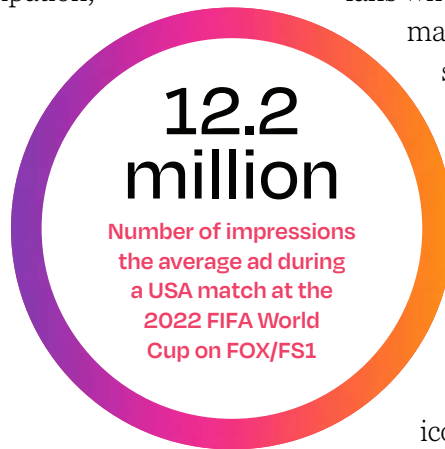
“You’ll see this influence in future Hyundai partnerships across sports,” Gilpin adds. “We’re looking for platforms where we can

combine innovation, community, and purpose, where we can help unlock potential and support what’s next. The World Cup shows that when you put people first and meet

fans where they are, sports marketing becomes something bigger: it becomes a force for inspiration and progress.”

Take a brand like Coca-Cola. The beverage and consumer packaged goods icon has been a fixture of the world’s

biggest sporting moments for decades — FIFA World Cup, Olympics, NCAA. To Daniel Dao, global senior director of Strategy and Integration at the brand’s EPICS unit (Entertainment,





Hyundai keeps its brand in play throughout the fan experience – from tip-off to halftime and beyond.

Partnerships, Influencers, Culture, Sports), the company’s approach to tentpole events of all kinds is rooted in terms of what stays constant and what evolves.

“In reality, fandom knows no season,” Dao says. “It’s ever-present, moving from passion to passion and experience to experience. In the case of football, the work that we do with FIFA will bridge into our annual partnerships with leagues like the Premier League and MLS, in addition to other regional tournaments like Copa Libertadores in Latin America. Additionally, our partnership with national teams and clubs provide the local relevance to those competitions while our roster of football

athletes creates opportunities to share throughout the year.”

Beyond that, Dao and Coca-Cola look at how these passions intersect. For example, with both football and FIFA, the brand launched its global music anthem in the form of reimagining Van Halen’s ‘80s hit “Jump” featuring current and classic pop stars like J Balvin, Amber Mark, Travis Barker and Steve Vai. The song serves as the real and virtual leap of distributing more than 1 billion collectible PANINI stickers around the world this year.

“We recognize and appreciate the value in building long-term relationships with our rightsholder partners, along with our consumers and customers,” Dao adds. “At the

core, when we are able to partner with like-minded rightsholders that share in our values and vision, it provides the foundation that can endure for decades.”

The Olympic partnership, he notes, allows the company to deliver against its purpose — “to refresh the world and make a difference” — at a global scale “that truly brings the world together every two years.”

Of course, brands like Hyundai, Zillow, Coca-Cola, and others have numerous options for sparking fan passion across a constant stream of major sports events. Their broadcast and streaming allies are able to take advantage of that “always on” quality like never before.

# THE BROADCAST LENS DISTRIBUTING FANDOM

For broadcast partners holding rights to the year's biggest tentpoles, these events represent both commercial opportunity and strategic laboratory. >





Matilda De Angelis performs during the opening ceremony of the Milano Cortina 2026 Winter Olympics at San Siro Stadium on February 06, 2026 in Milan, Italy. (Photo by Maja Hitij/Getty Images)

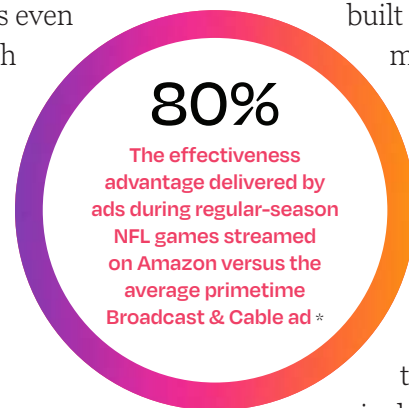
“ During the 2026 Milano Cortina Winter Olympics, viewers were 97% more likely to search for brands that advertised in the Opening Ceremony than for brands advertising in major league sports.

The commercial case is straightforward: massive reach, premium inventory, and audiences who actually watch the ads. The strategic dimension is even more interesting. Both networks are using the World Cup to test approaches to fan engagement that extend well beyond the tournament itself.

Robert Gottlieb, President of Marketing at Fox Sports, calls it “once in a career, once in a lifetime” and emphasizes the need to stand out amid the noise. “Nike, Pepsi, Coca-

Cola — they’re going to feature Messi, Ronaldo, Yamal,” he says. “We need something that Fox Sports can own. The strategy is built around three pillars: make it undeniably American, incite emotion, and give fans goosebumps.”

The operational scale is considerable. Fox is deploying technology that includes AI-powered highlight generation capable of producing near-real-time clips, alongside experimental features like an AI chatbot modeled on



\*Note: The top brands and creatives filtered out Theatrical Movie, Streaming Movie, Streaming Show and uses an airings threshold of 10

personality Colin Cowherd. But Collins is careful to note that technology serves the experience rather than defining it. “In these big communal moments, the broadcast and the game are the star,” he says. “What we’re doing with data and analytics is finding fans in different niche areas and targeting them — extending the moment rather than replacing it.”

The tension between personalization and communal experience runs throughout broadcast strategy in 2026. Streaming platforms offer increasingly customized viewing options, but the core appeal of tentpole events remains stubbornly collective. “For most people now, they don’t really distinguish between streaming and linear,” Gottlieb says. “But when the U.S. plays its first match, people want to be watching with their friends,

with their family, experiencing the same moment together.”

Laura Grover, SVP and Head of Client Solutions at streaming media analytics firm EDO, frames the dynamic in measurable terms. “In an increasingly fragmented environment, shared moments are more valuable,” she says. “Live sports, especially global tentpole events such as the World Cup, encourage fans to watch matches live, creating massive shared moments.”

EDO’s data quantifies the gap. During the 2026 Milano Cortina Winter Olympics, viewers were 97% more likely to search for brands that advertised in the Opening Ceremony than for brands advertising in major league sports. Total ad impact during the Games rose 63% over the 2022 Beijing edition, even as overall viewership grew 34% to 21.4 million. The compounding effect — more viewers, more engagement per viewer — is what makes these >



## FEATURED



**Robert Gottlieb**

PRESIDENT OF  
MARKETING AT FOX  
SPORTS



**Laura Grover**

SVP AND HEAD OF  
CLIENT SOLUTIONS  
AT EDO



**Peter Lazarus**

EVP OF ADVERTISING  
SALES AND  
PARTNERSHIPS AT  
NBC SPORTS

moments economically distinct from the rest of the media calendar.

Streaming amplifies the dynamic rather than diluting it. NBCU reported that the 2026 Winter Olympics saw 2.5x more views on streaming services like Peacock than in 2022. EDO's broader tracking shows that ads in Netflix's MLB Opening Night this past March were 67% more effective than the average primetime program on broadcast or cable, while ads during Amazon Prime Video's regular-season NFL broadcasts ran 80% above the primetime benchmark. "For passionate fans, streaming services provide the opportunity



Search activity for LA28 jumped 5,000% following the 2026 Winter Games, and 30% of fans say they are more excited for an Olympics on U.S. soil.



Fans are seen at the Bullpen Fan Activation during the MLB Opening Night Game: Yankees vs. Giants, at Momo's on March 25, 2026 in San Francisco, California. (Photo by Thos Robinson/Getty Images for Netflix)

to engage more deeply," Grover says. "When fans enjoy watching a game, streaming services are perfect for shoulder programming — the ability to search past matchups, team specials, related content. That keeps an already-engaged consumer in front of advertisers."

The Spanish-language opportunity is equally significant — and arguably more developed. Peter Lazarus, EVP of Advertising Sales and Partnerships at NBC Sports, reports that Telemundo's World Cup spurred ad spending roughly double compared to what brands committed in 2022. The premium reflects research showing that Spanish-language viewers experience the World Cup with heightened emotional intensity:

90% describe themselves as "more passionate than not" about the tournament, and 8 in 10 say World Cup ads are enjoyable. Spanish-language broadcasts deliver double-digit lifts in emotional connection and purchase intent compared to English-language alternatives.

"Fandom doesn't live only in moments. It lives year-round, and so should brands," Lazarus says. He points to NBCU's broader sports portfolio as evidence. At the Milano Cortina Winter Olympics, NBCU reached more than 223 million Americans, with research showing that a single Olympic ad could outperform 100 or more competitive TV ads in driving search engagement. The playbook — using tentpoles to acquire fans



and shoulder programming to retain them — applies directly to the World Cup, and increasingly to the LA28 Summer Games on the horizon. Search activity for LA28 jumped 5,000% following the 2026 Winter Games, and 30% of fans say they are more excited for an Olympics on U.S. soil.

The broader broadcast architecture also reflects how viewers actually find sponsors. YouGov data shows that TV broadcasts and social media are the two dominant channels for sponsor recall — 43% and 41% respectively across markets. But the channel mix

shifts sharply by age: among fans 18-34, social media leads at 49%, with TV at 39%. Among those 35 and older, the order reverses, with TV at 45% and social at 37%.

For broadcast platforms, that pattern reinforces a

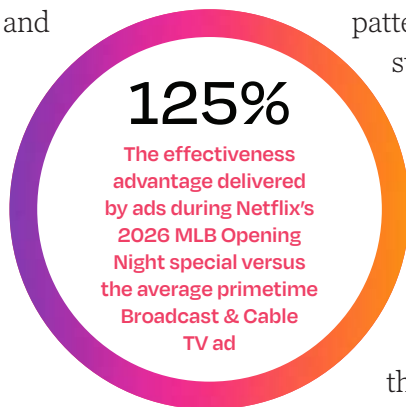
strategic point: the broadcast itself is the foundation, but the social conversation it generates is where younger fandom takes shape. Networks that get it right are not choosing between the two,

but orchestrating across them.

Getting sports marketing right in 2026 ultimately comes down to sponsors and media companies driving brand values

with clear performance metrics and outcomes, says Coca-Cola’s Dao.

“In creating ongoing meaningfulness and relevance of these [media] partnerships, we leverage data to unlock the most powerful insights on what’s resonating with fans, and we look to action those against a backdrop where we can deploy our global scale but with local intimacy,” Dao says. “And through these partnerships we create an environment to boldly innovate across product, packaging and experiences. We create the most value and effectiveness when we activate the full Coca-Cola System, i.e., bottlers, customers, associates, in addition to our networked partners (i.e, agencies, media, creators, rightsholders).”



# THE BRAND LENS ACTIVATING FANDOM

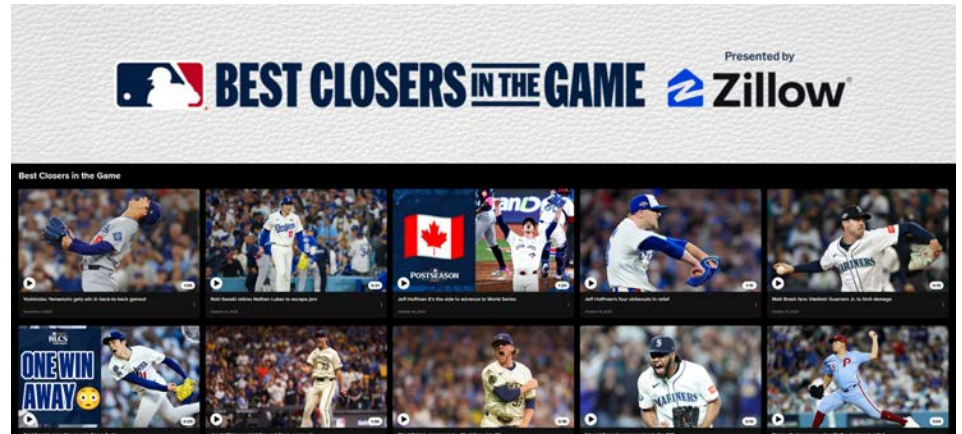
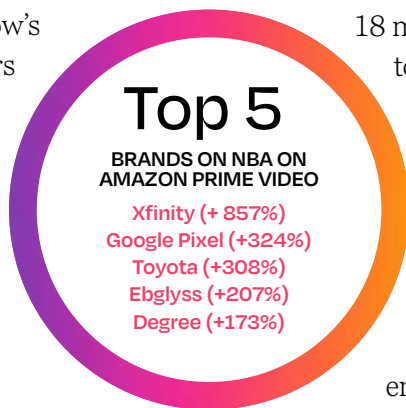


For brands entering the tentpole sports environments, the strategic question is how to fully leverage opportunities. >



The tournament’s scale guarantees reach; the challenge is converting that reach into something more durable. YouGov research finds that 48% of likely World Cup followers say they feel more positively toward tournament sponsors — a figure that rises to 60% among viewers under 35. But sentiment alone does not drive business outcomes. The brands seeing the strongest returns are those connecting their World Cup presence to a broader fan strategy.

Zillow offers an instructive case study. The company’s sports marketing portfolio spans MLB, the NFL, WNBA, and NWSL, with the World Cup representing a natural extension of partnerships that Kandikonda describes as purpose-aligned. Zillow’s brand platform centers on the idea of getting home — a concept that maps naturally onto baseball and extends more broadly to the emotional territory of belonging and arrival. The company’s Rams “Zillow Draft House” activation in Los Angeles and its national MLB partnership reflect a consistent principle: meeting fans in moments that connect to the company’s core purpose.



When thinking about advertising during sports like soccer, Zillow’s Kandikonda says the format is part of the appeal. “Soccer doesn’t have the constant commercial interruptions of American football,” he says. “The audience isn’t fatigued — they’re engaged continuously for 45 minutes at a stretch. That creates opportunities for brand integration that feel organic rather than intrusive.”

Zillow’s preparation began 18 months before the tournament, with investments in platform readiness and data infrastructure designed to capture and respond to fan signals. Kandikonda emphasizes that the company measures sports

marketing primarily through long-term brand metrics rather than short-term conversion. “When you do it well, the impact to mid and bottom funnel media is actually better. But you have to



Zillow meets fans in the moments that matter most — connecting brand purpose to real life moments.

be patient. You’re building brand love, not harvesting transactions.”

Zillow’s patience marks the company as something of an outlier in an environment crowded with brands chasing immediate activation. The Brand Innovators FIFA World Cup 2026 Ad Tracker, compiled by Dianna Dilworth, catalogs dozens of major campaigns; the most ambitious share a common feature, treating the tournament as a moment within a larger fan relationship rather than a standalone media buy.

A few examples illustrate the range. Verizon, an official telecommunications sponsor, has explicitly rejected traditional sweepstakes mechanics in favor of

what Ricardo Aspiazu, Verizon’s SVP for Creative & Brand Design, calls “creating a core memory.” Michelob ULTRA, the official beer sponsor, redesigned the World Cup’s “Superior Player of the Match” trophy and built a Messi-centered ad around the reveal — YouGov tracking data shows the campaign drove an 11-point lift in Net Impression among Canadian football fans within weeks of launch.

Ferrero North America, maker of Nerds, Sweet Tarts and other confections, has committed \$100 million combined to Super Bowl and World Cup activation, what Michael Lindsey, the brand’s global president and GM says is “our boldest statement of confidence in our North American growth trajectory.” The pattern repeats across tentpoles. Brands building lasting equity stitch the moment into a longer campaign that extends well past the closing ceremony or final whistle.



Lionel Messi, shown here holding the Superior Player of the Match Trophy, is Michelob Ultra’s global soccer ambassador and appears in a new TV commercial for the FIFA Club World Cup.

Hyundai’s “Be There With Hyundai” platform pairs vehicle marketing with a children’s art contest, “The Greatest Cheer,” that generates content for the brand throughout 2026.

“For Hyundai, the World Cup isn’t just the world’s biggest sporting moment, it’s a human moment,” says Gilpin. “It brings together families, communities, and generations around shared passion and possibility. That’s exactly where our brand shows up. Through

our ‘Next Starts Now’ campaign, we’re using the World Cup to move beyond traditional sponsorship and create real, meaningful connections with fans, especially younger ones.”

Gilpin points to Hyundai’s sponsoring of hands-on youth soccer camps in local communities, which are designed to inspire the next generation alongside legends like Mia Hamm, or bringing innovation and mobility to life around the tournament.

“Our goal is simple,” the >

## FEATURED



**Ravi Kandikonda**  
CMO, ZILLOW GROUP



**Steven Graciano**  
SVP, SPORTS STRATEGY, CANVAS WORLDWIDE



**Daniel Dao**  
GLOBAL SENIOR DIRECTOR, STRATEGY & INTEGRATIONS EPICS, COCA COLA

Hyundai executives tells us, “and that’s to make the experience more personal, more accessible, and more impactful. At Hyundai, our vision is Progress for Humanity. The World Cup gives us a powerful platform to live that out, by investing in people, inspiring belief, and helping fans see that the future doesn’t start someday. It starts now.”

The data suggests investments like Hyundai’s are well-founded. YouGov research shows that Americans who plan to watch the World Cup are twice as likely as the general population to notice sponsors. The gap widens for specific activation types: World Cup viewers index at 228 on sports equipment sponsorship recall, 200



43% [of polled Americans] say they seek experiences that make good social media — an audience that has come prepared to amplify what brands give them.

on jersey sponsors, and 196 on TV graphics. For brands with on-site presence, the research points to two priorities. The first is special discounts: 51% of likely attendees say they “deserve special discounts from sponsors,” more than double the general population. The second is shareable content: 43% say they seek experiences that make good social media — an audience that has come prepared to amplify what brands give them.

“Fan passion has always been there. What’s changed is the way brands should look at sports as a platform,” says Steven Graciano, SVP of Sports Strategy at Canvas Worldwide. “There are so many more touchpoints now than there were before. And brands have to view sports as a full-funnel marketing platform — as opposed to before, when it was just signage and awareness. Now there are different levers you can pull within sports that get you to the heart of a fan, and then to conversion. It’s so much more sophisticated than it was in the past. And it’s only becoming more so as we prepare our

brand and media partners for the Los Angeles 2028 Olympics.”

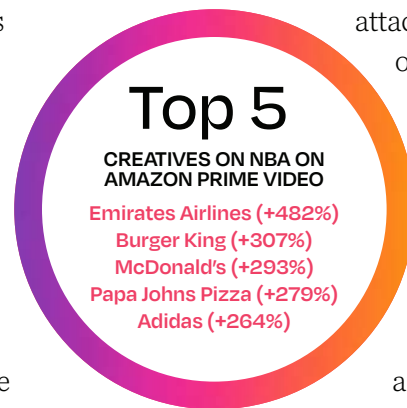
The sophistication, Graciano argues, comes from the convergence of measurement tools and access. “Measurement tools are more advanced than they were. More is being asked of these sports programs that a brand is

attached to, and a lot of the time they can better inform sports partnerships in terms of how brands drive sentiment and action. At the same time, leagues and athletes are still building out their own

brands. They’re letting you take a peek behind the curtain more than before. That brings a different layer, and even more passion in some ways, because fans feel closer to the athletes and the leagues. There are more ways to see what the league and the athletes are about. The ecosystem has gotten more sophisticated, so there’s

more a brand can rely on when it looks at a sports partnership.”

That sophistication is also tied to the AI-powered media intelligence platforms that now track brand visibility





FIFA World Cup Trophy Tour by Coca-Cola – Dallas Panini Community Event DALLAS, TEXAS – APRIL 24: Guests attend the FIFA World Cup Trophy Tour by Coca-Cola – Dallas Panini community event at Boys & Girls Club, East Dallas on April 24, 2026 in Dallas, Texas. (Photo by Rick Kern/Getty Images for The Coca-Cola Company)

across linear and streaming broadcasts, social media, and digital channels in near real-time, translating sponsorship exposure into equivalent media value. The capability matters particularly for World Cup activation because soccer’s no-commercial-break format means that in-broadcast brand visibility — on jerseys, LED boards, digital overlays — gets roughly four times the occurrence time of comparable assets in NBA broadcasts. For brands measuring full-funnel impact, that data becomes a critical input into mix modeling and renewal decisions.

“For the past century, sports partnerships have been key to the growth of our company, bottlers, customers and brands,” Coca-Cola’s Dao says. “We

look at sports partnerships from three critical areas.”

Dao outlines those three as:

### **Brand Growth.**

“Sports allow us to connect with consumers through things they care about. Billions of people around the world tune in to major sporting events, and these numbers tell a story – sport is an undeniable passion point. When our brands are there tapping into consumer passions, it helps drive business growth.”

### **Customer Growth.**

“Our business relies on our system of bottlers and customers to reach our consumers. They are key in the value equation and sports has proven to be a wonderful unifier within our

system where everyone recognizes its value and wants to activate around these major moments.”

### **Purpose Alignment.**

“Our company’s purpose is to refresh the world and make a difference. There’s immense power in sport to bring people together and leave a legacy, especially as we work with partners with shared values,” Dao says.

The deeper lesson is that tentpole activation is increasingly measured against the same standards as any other media investment. However, there is one important difference. The brands building lasting equity aren’t simply optimizing for the moment, but for what comes after it.

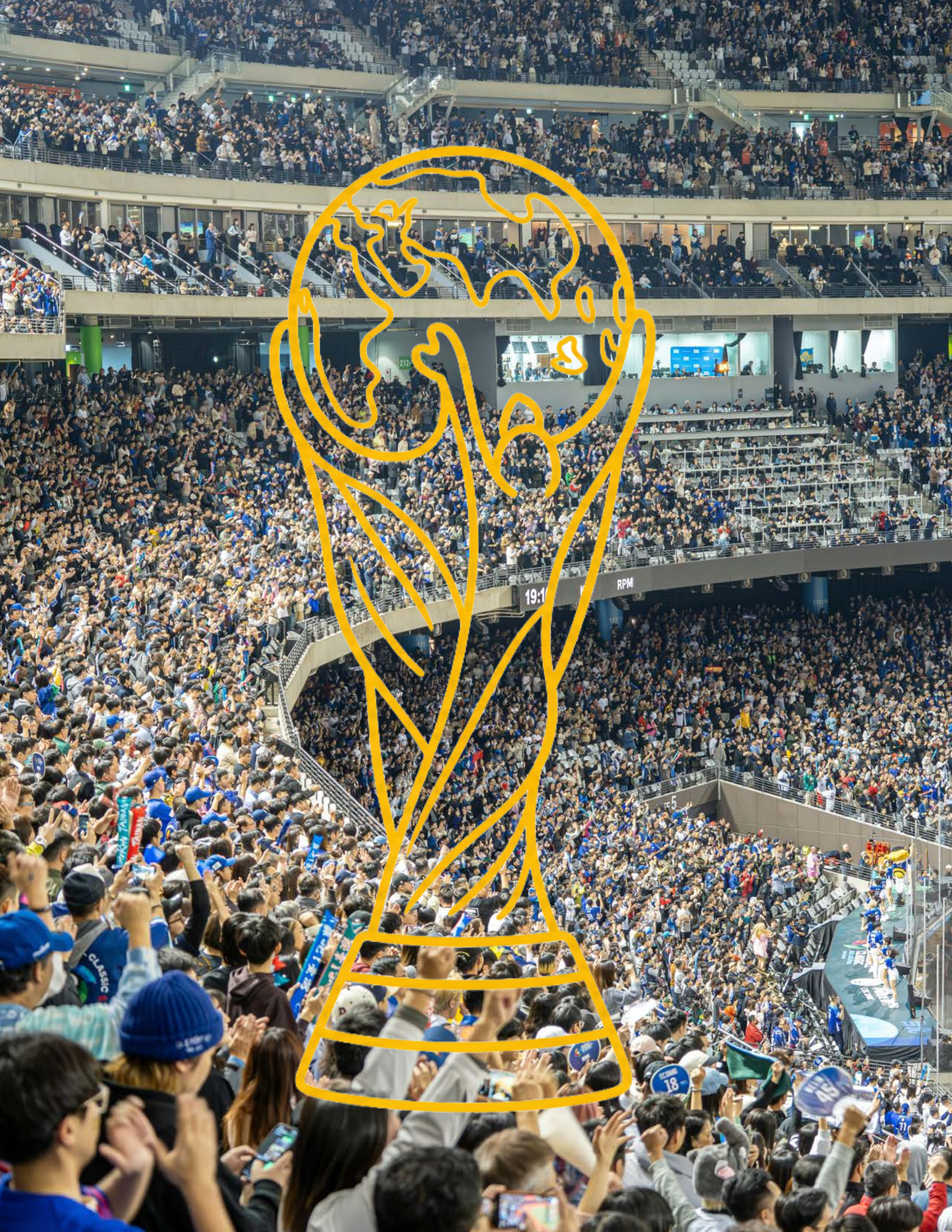
# THE SPORTS PROPERTY LENS



# GROWING FANDOM



For soccer as a sport in America, the 2026 World Cup represents something closer to an inflection point than a single event. >



The tournament arrives after a decade of accelerating momentum. It started with Major League Soccer's long expansion that began in 2005, on to the 2023 Apple TV broadcast deal, record National Women's Soccer League attendance in March of this year, as well as the arrival of global stars like Lionel Messi at Inter Miami three years ago.

But soccer is not alone in

benefiting from this moment. The nature of sports fandom itself is shifting, and a constellation of categories — women's basketball, volleyball, women's hockey, combat sports, motorsports — are riding the same wave.

“Volleyball has been the number-one girls' high school team sport in the country for more than a decade, ranking ahead of

both basketball and soccer,” says Weston. “Those athletes take their passion for the sport into college, and now they are following their favorite college players into Major League Volleyball.”

Until MLV launched, American volleyball players had to leave the country to play professionally — which meant fans lost the ability to follow them. “The



Volleyball has been the number-one girls' high school team sport in the country for more than a decade,



appetite has always been there,” Weston says. “It just had not been fully served until now.”

The forces driving growth across these categories extend beyond any single league or sport. Fandom is becoming more personal, more portable, and less tethered to geography than in previous generations. Fans increasingly follow individual athletes, communities, and cultural storylines across multiple platforms, creating new pathways for engagement and expanding the ways sports properties can attract and retain audiences.

Deloitte’s research finds that Gen Z and millennial fans report belonging to four distinct fandoms on average, compared to three among older generations. They are also significantly more likely to engage with their fandoms across platforms — 71% of Gen Z and 67% of millennial fans say their fandom leads them to engage across multiple platforms, compared to 30% of boomers.

Soccer is unusually well-suited to this environment. The sport’s global footprint means fans can follow players across leagues and national teams, creating multiple entry points and sustained engagement opportunities. YouGov data shows that Messi and Ronaldo are the



SAN DIEGO, CALIFORNIA – MAY 24: Julie Doyle #20 of Orlando Pride competes for the ball against Kenza Dali #10 of San Diego Wave FC during the NWSL match between San Diego Wave FC and Orlando Pride at Snapdragon Stadium on May 24, 2026 in San Diego, California. (Photo by Mike Nowak/NWSL via Getty Images)

most popular players across all three host countries, with domestic stars — Christian Pulisic in the U.S., Alphonso Davies in Canada, Raúl Jiménez in Mexico — building recognition behind them. For many North American fans, the World Cup will be the first opportunity to see these players compete live in a major international competition. The emotional intensity of that first encounter is the kind of moment that converts curiosity into commitment.

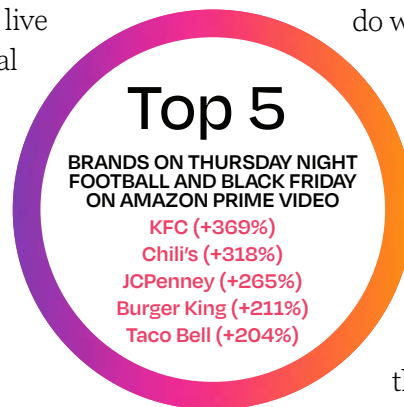
The same dynamic plays out across categories. Women’s hockey sees cultural attention spike during Olympic cycles and ripple outward to volleyball, basketball, and soccer. New leagues like Major League Volleyball are building from a

standing start, capturing audiences that the Olympic Games and college championships have warmed up but not yet locked in.

The challenge each of these properties faces is identical: the tentpole gives you the audience.

Building the league is what you do with them afterward.

The Kansas City Current’s Monroe argues that community is the connective tissue that turns audiences into fans. “The power that sports have to impact a community and create moments where people feel seen and heard is incredible,” she says. “Teams can work with community groups and partners to highlight groups or initiatives that are important to the



communities where they play. That drives cultural relevance and helps reach casual fans who may come to fandom because of shared values.”

The Current’s approach reflects this logic. The club opened CPKC Stadium in 2024 as the first purpose-built professional venue for a women’s sports team — a \$120 million infrastructure investment that signaled a commitment to permanence in the market. The economics that follow from that kind of rootedness are different in kind from the economics of a touring property. Fans who feel a place is theirs come back. Fans who feel rented don’t.

The conversion opportunity — turning World Cup or Olympics



Women’s hockey sees cultural attention spike during Olympic cycles and ripple outward to volleyball, basketball, and soccer.

viewers into year-round soccer or volleyball fans — depends on what happens after the tournament ends. A successful broadcast running over several weeks is a nice outcome. But discovering and building upon fandom’s durable infrastructure is far better. A sound strategy captures and retains viewers as fans.

The Olympic effect in particular is real, MLV’s Weston says. Now the women’s sports landscape is no longer dependent on it. “The Olympics are still one of the few truly global cultural moments where athletes become household names overnight,” she says. “But I also think we are getting beyond the point where women’s sports only spike every four years. Paris 2024 was the first Olympic cycle where U.S. Women’s National Team players returned to their pro teams in the United States instead of exclusively playing internationally. That creates a much easier pathway for American fans to stay engaged year-round.”

Canvas’s Graciano, observing the same dynamic from the agency side, sees the Olympics functioning as an accelerant rather than the ceiling. “For the Olympics, look at the different sports that get a spotlight every four years,” he says. “Because there are so many more measurement tools and there’s >



Caitlin Clark of the Indiana Fever dribbles the ball while being guarded by Sydney Colson of the Las Vegas Aces in the first quarter at Gainbridge Fieldhouse on September 11, 2024 in Indianapolis, Indiana. (Photo by Dylan Buell/Getty Images)





PARIS, FRANCE – AUGUST 10: Shamier Little, Sydney McLaughlin-Levrone, Gabrielle Thomas and Alexis Holmes of Team United States celebrate winning the Gold medal in the Women’s 4 x 400m Relay Final on day fifteen of the Olympic Games Paris 2024 at Stade de France on August 10, 2024 in Paris, France. (Photo by Patrick Smith/Getty Images)



The playbook is becoming clearer. Tentpole tournaments generate the moment. Athlete-level storytelling sustains attention across the calendar.

more sophistication, that engine of awareness is going to be sustained more than it has been in the past. Sports like volleyball — there’s going to be a bigger opportunity to draw in that awareness, continue to build and sustain it, and show brands how these emerging sports are going to have more success than they may have in the past.”

The strategic implication for brands, Graciano finds, is the value of getting in early. “There’s more of an avid fan base that’s going to continue to grow once these sports are in the spotlight. The athletes participating are sharing their own stories, building their

own narratives, building their own brands — so there’s more opportunity for a brand to be involved with the sport overall. And for brands that have been part of the fabric of a sport from the beginning, before it continues to grow, there are real pluses. You’re seen as a mainstay, a follower of that sport — and that speaks to being part of the fan community.”

Deloitte’s research is particularly relevant here. Roughly half of fans say social media is their primary way of engaging with their fandoms year-round, and 36% lean on fan or companion podcasts between releases. More tellingly, 40% of fans



Megan Carter pursues Nadia Mattivi during the championship game of the annual Womens Beanpot Hockey Tournament at TD Garden on January 23, 2024 in Boston, Massachusetts. Photo by Richard T Gagnon/Getty Images

(and 49% of Gen Z and millennial fans) say they wish they could aggregate all the content related to their favorite property into one place. Put into strategic language, the off-season is an opportunity that most properties currently fail to capture.

For MLS, NWSL, US Soccer, and FIFA itself, the playbook is becoming clearer. Tentpole tournaments generate the moment. Athlete-level storytelling sustains attention across the calendar. Social media — particularly creator-led content — extends fan experience beyond the broadcast. And first-party data

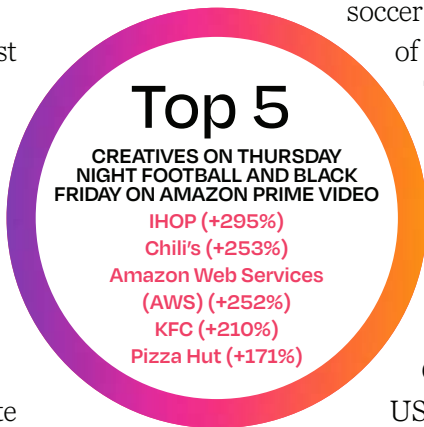
infrastructure converts engagement into intelligence that can inform everything from sponsorship pricing to content programming.

The stakes extend well beyond soccer. Merrick Haydon of brand consultancy

ThirtyThree18, quoted in The New York Times, captures the broader principle: “Relevance now beats reach.”

Catherine Newman, US Soccer’s CMO, articulates the principle

from inside the federation. “Soccer has always been about more than what happens on the field,” she says. “It lives in our communities, in our fans, and in every person



## Top 10 streaming games by media engagement rate



- 2025 YouTube Opening NFL Game (+180%)
- 2025 Peacock Exclusive NFL Game (+151%)
- 2025 NFL Football Regular Season on Amazon Prime Video (+80%)
- 2025 NFL Football Season on Amazon Prime Video (inclusive of regular season and playoffs) (+78%)
- 2026 MLB Opening Night on Netflix (+67%)
- 2025 NFL Football Wild Card Game on Amazon Prime Video (+47%)
- 2025 NFL Football Black Friday on Amazon Prime Video (+37%)
- 2025-2026 NBA Basketball Play-In Tournament on Amazon Prime (+24%)
- 2025-2026 NBA Basketball First Round (Initial Games) Tournament on Amazon Prime (+21%)

Data provided by EDO

who believes in this team.” The World Cup will deliver one of the largest audiences in American sports history. Whether it delivers a generation of new fans — durable, engaged, and economically active — depends on whether the sport’s stewards build the connective tissue to hold them.

CANVAS PRESENTS  
THE FANDOM ADVANTAGE



# THE CONVERGENCE FANDOM AS COMPETITIVE ADVANTAGE

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The 2026 FIFA World Cup is a tournament,  
but the lessons it offers are universal. >



Whether the context is the Olympics, the Super Bowl, March Madness, or the rapidly expanding portfolio of women's sports properties, the same fundamental dynamics apply: Fragmentation has made mass reach harder to achieve and easier to waste, attention is abundant but engagement is scarce, and the organizations that treat fans as long-term relationships rather than short-term transactions are building advantages that compound across event cycles.

Sport occupies a singular cultural position in this environment. It remains, perhaps uniquely among forms of mass media, a space where strangers can gather, share an experience, and feel connected to something larger than themselves. In an era of algorithmic personalization, where individual content feeds become increasingly idiosyncratic, the collective experience of watching a national team play in a global tournament is itself an asset. People don't gather around personalized feeds. They gather around shared stakes. The World Cup, like the Olympics and the Super Bowl, is one of the last reliably communal experiences in American media life — and its value to brands, broadcasters, and properties is rising precisely because of its increasing rarity.

The implication for marketers is that the prevailing framework of attention economics is incomplete. Optimizing for impressions in a fragmented environment means buying smaller and smaller slices of distracted attention. Whereas optimizing for fandom — for the durable, multi-channel, year-round relationship — produces a different category of return. Fans don't just see ads. They wear merchandise, attend games, follow athletes, share content with friends, and bring their children into the same affiliations they were raised in. Their economic



Sport remains, perhaps uniquely among forms of mass media, a space where strangers can gather, share an experience, and feel connected to something larger than themselves.

value is not a single transaction, but a compounding stream of advocacy, loyalty, and lifetime engagement.

This is the framework Canvas Worldwide has been building its sports practice around. The work begins by asking different questions than most agencies. Not “how many people will see this?” but “how will this deepen our client's relationship with the people who already care?” Not “what's the cost per thousand?” but “what's the lifetime value of the fans we're acquiring?” Not “how do we extend the campaign?” but “how do we earn a place in the fan's identity?”

What emerges from the research and interviews conducted for this report is a consistent set of principles for thinking about fandom strategy.

The first is recognition: Fans are behaviorally and economically distinct from audiences, and that distinction matters more, not less, as the media environment fragments.

The second is patience: Tentpole events are not relationships; they are acquisition moments. The brands and properties extracting the most value are those investing in the spaces between events — the social conversation, the off-season content, the always-on community infrastructure.

The third is alignment: The >

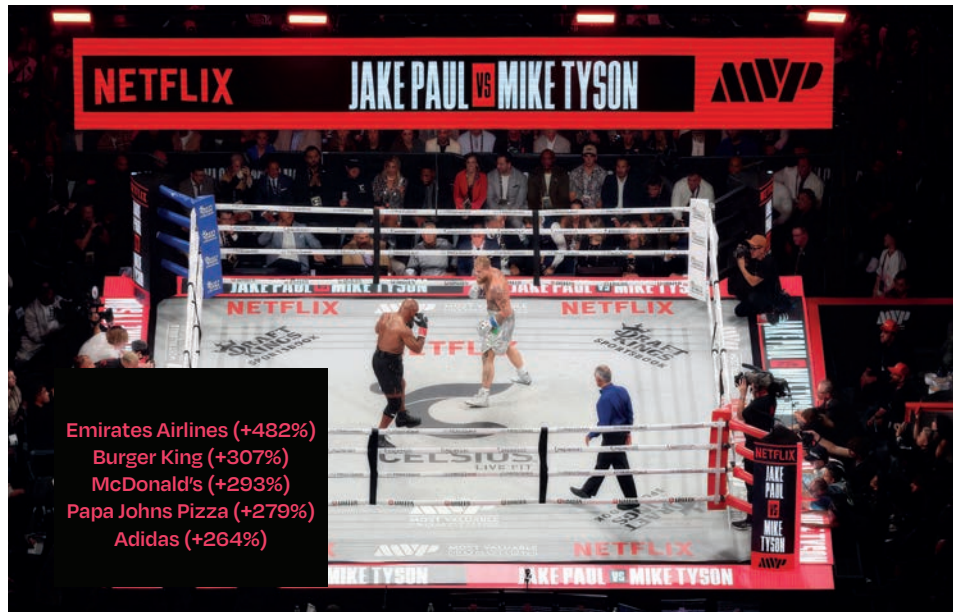


Napheesa Collier of the Minnesota Lynx heads for the net as Jonquel Jones of the New York Liberty defends during Game Five of the WNBA Finals at Barclays Center on October 20, 2024 in the Brooklyn borough of New York City. Photo by Elsa/Getty Images



# Top 10 streaming games by ad impact

- **2025 NFL Football Wild Card Game on Amazon Prime Video** 85% as impactful as an ad on primetime B&C
- **2025 YouTube Opening NFL Game** 84x as impactful as an ad on primetime B&C
- **2025 NFL Football Season on Amazon Prime Video** 54x as impactful as an ad on primetime B&C
- **2025 NFL Football Regular Season on Amazon Prime Video** 51x as impactful as an ad on primetime B&C
- **2025 Peacock Exclusive NFL Game** 49x as impactful as an ad on primetime B&C
- **2025 NFL Football Black Friday on Amazon Prime Video** 41x as impactful as an ad on primetime B&C
- **2026 MLB Opening Night on Netflix** 9.2x as impactful as an ad on primetime B&C
- **2025-2026 NBA Basketball First Round (Initial Games) Tournament on Amazon Prime** 7x as impactful as an ad on primetime B&C
- **2025-2026 NBA Basketball Play-In Tournament on Amazon Prime** 6.4x as impactful as an ad on primetime B&C
- **2025-2026 NBA Basketball Season-to-Date on Amazon Prime** 2.5x as impactful as an ad on primetime B&C
- **2025-2026 NBA Basketball Regular Season on Amazon Prime** 2x as impactful as an ad on primetime B&C



- Emirates Airlines (+482%)
- Burger King (+307%)
- McDonald's (+293%)
- Papa John's Pizza (+279%)
- Adidas (+264%)

Jake Paul vs. Mike Tyson at AT&T Stadium on November 15, 2024. Photo by Brett Carlsen/Getty Images for Netflix © 2024

most durable fan relationships emerge when a brand's purpose connects authentically to the fan's identity. Zillow's "get home" platform finds genuine resonance in baseball not because it tested well but because the connection is real. Forced alignment fails. Earned alignment endures.

The fourth is measurement: The metrics that matter for fandom strategy are not the metrics that dominate quarterly reports. Brand impression, sentiment lift, share of voice within fan communities, lifetime engagement value — these are the signals that predict long-term ROI. The brands optimizing exclusively for short-term conversion miss the more valuable game.

As Zillow's Kandikonda notes, when fan strategy is executed well, the impact on mid- and bottom-funnel performance is actually better than what direct-response

optimization alone produces. Brand love, properly cultivated, drives transactions. Transactions, on their own, do not produce brand love.

MLV's Weston puts it more bluntly. "Do not wait for perfect measurement models before you act," she advises CMOs. "The brands that win culturally are usually early, consistent, and authentic long before the spreadsheets fully validate the opportunity."

To that, EDO's Grover adds, "To know what works in streaming and linear advertising, you have to go beyond impressions and attention," she says. "Those audience metrics only tell you what people saw.

Immediate, mid-funnel engagement metrics like search and site visits tell you what people did — capturing the magic moment when consideration turns into intent." Those are the signals the strongest sports investments in 2026 will be held to.

The fifth is what might be called

Data provided by EDO

the convergence imperative: The lines between broadcast, brand, and property are blurring. Broadcasters are becoming brands and brands are becoming media companies. Sports properties are becoming content engines, and content platforms are becoming sports properties. In this environment, the organizations succeeding are those that orchestrate across the full ecosystem rather than optimizing within their traditional category. The summer sports of 2026 will reward the orchestrators. The fragmenters will reach fewer fans, less deeply, for less return.

For CMOs and their agency partners, the practical implications are straightforward. When evaluating sports investments, demand a fan strategy, not a media plan. When measuring outcomes, insist on long-term metrics that capture what's actually being built. When designing campaigns, start



Zillow turns fandom into meaningful connections.

with the fan's existing identity and ask how the brand can serve it — rather than starting with the brand's message and asking how to insert it into a moment. The best sports marketing in 2026 will feel like belonging.

This sports season offers a different way of thinking about reach. When one tentpole event

ends and another gears up, will the viewers be captured and converted to more devoted fans in the months and years that follow? Will the brands that showed up during the moment still show up when the moment is over? Those are the tests. That is the opportunity. That is the fandom advantage.

Graciano sees this moment — and all its advantages and challenges — as foundational for the next decade of sports marketing.

“There are always going to be learnings after huge events like the World Cup and the Olympics,” Graciano says. “We’ll look back, see how brands activated around these large platforms, take the learnings, and figure out how to do it better. With LA28 ahead, you have a diverse community across all sports, major and niche, that are going to make these tentpole events that much richer.”

## FEATURED



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