

JULY 2026

GEN Z

SPORTS FANDOM + THE MEGA-MOMENT

ACC / ACCELERATION Community of Companies

THE USC ANNENBERG x ACC THINK TANK

is a directed research program at the USC Annenberg School for Communication and Journalism. It serves as a vibrant interdisciplinary hub fostering collaboration between industry experts from the Acceleration Community of Companies, a premier marketing, communications and media agency network, and the inquisitive student minds at USC Annenberg.

Together, we engage in thought-provoking interactive discussions, dynamic research methodologies, and forward-thinking trend forecasting, creating a fertile ground for valuable insights.

USC Annenberg
School for Communication and Journalism

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METHODOLOGY

HOW WE BUILT THIS

To understand how Gen Z is reshaping sports fandom, we combined quantitative scale with qualitative depth through the USC Annenberg × ACC Think Tank, a semester-long directed research course made up of 15 USC graduate and undergraduate students working alongside leaders from ACC.

**All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2154 adults who are part of Generation Z (born 1997 or later). Fieldwork was undertaken between 12th - 20th May 2026. The survey was carried out online. The figures have been weighed and are representative of all US adults (aged 18-29).*

The report also incorporates secondary research from YouGov Profiles, drawing on rolling survey data collected by YouGov Plc. between June 2025 and June 2026. Findings are based on a 52-week dataset that is updated weekly. Data is nationally representative in the US and weighted.



LIVE FOCUS GROUPS

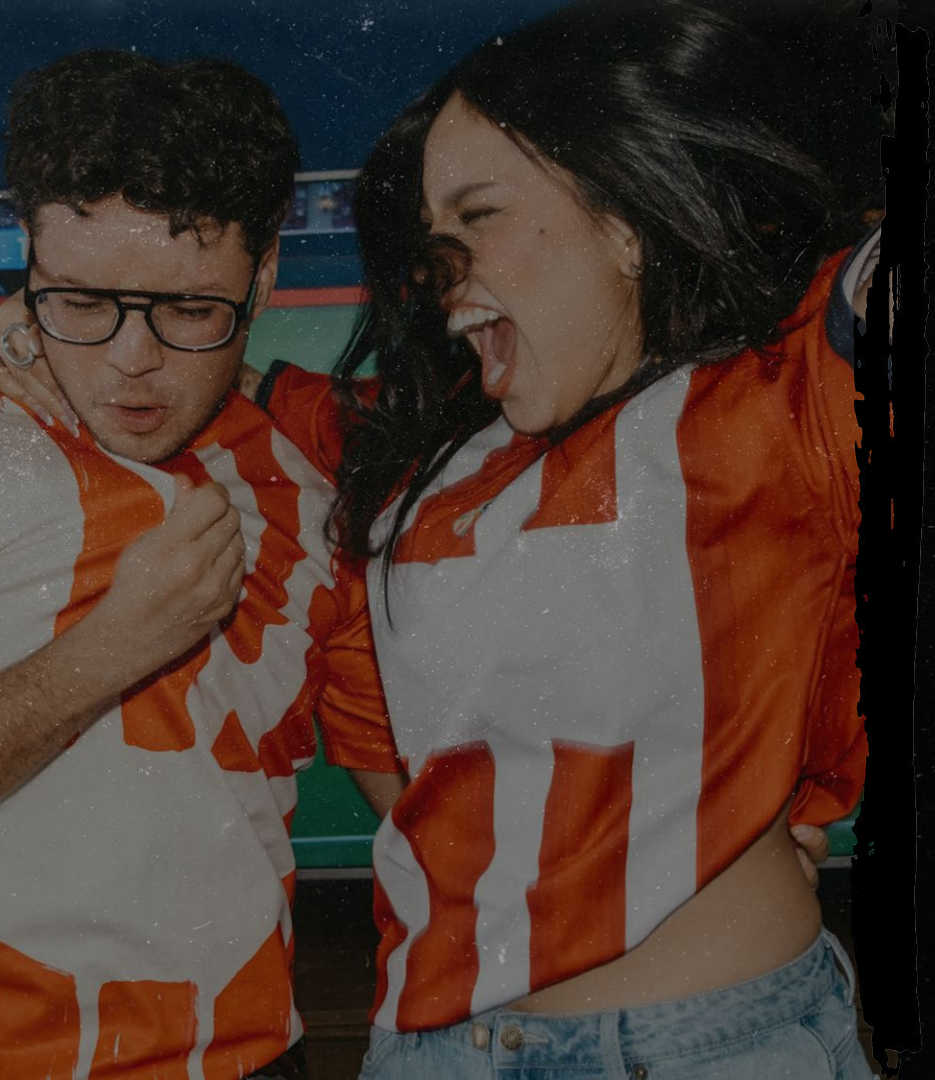
In-depth conversations with members of Gen Z spanning die-hard fans, casual participants, and sports skeptics to uncover the emotional logic behind modern fandom.

NATIONAL SURVEY

Nationally representative quantitative survey conducted in partnership with YouGov, a global online research data and analytics technology group.*

COMMUNITY SURVEY

A community survey of 146 Gen Z adults (aged 18-29) from around the world exploring identity, fandom pathways, participation triggers, and brand expectations.



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Emerging Forms of Fandom

For decades, sports fandom was predictable. Fandom was relatively stable. Viewership was habitual. Team loyalty was inherited.

For Gen Z, there are endless ways to be a fan. Fluid fandom. Second-screen viewership. Algorithmic interest.

And while athletes still compete against each other, they also compete against an infinite TikTok scroll, countless streaming options, and every other form of entertainment fighting for attention.

MACRO-THEME 1

ENTER THROUGH THE SIDE-DOOR



MACRO-THEME 1: THE SIDE-DOOR

FOR GEN Z, THE LOVE OF THE GAME OFTEN COMES LATER

Family and hometown loyalty still matter. They're just one path in. Today's fandom can begin with algorithms, group chats, relationships, and subcultures. They don't always fall in love with the game first.

They fall in love with everything around it

49% of Gen Z sports fans have become interested in a new sport or athlete because of fan-created content or something entirely outside the sport, like an athlete's relationship.

MACRO-THEME 1: THE SIDE-DOOR

FANDOM STARTS SIDEWAYS

The front door isn't the only door. For Gen Z, fandom can start with a Netflix docuseries, an athlete's tunnel walk, or #CoupleGoals.

The more sports collides with music, fashion, gaming, and internet culture, the easier it is to become a fan.

Short-term fandom

Intense interest that lasts less than a year. Often driven by "hype spikes" or mega moments like the Super Bowl, FIFA World Cup, or Olympics.

Which, if any, of the following has triggered intense, short-term interest in a sport or athlete?

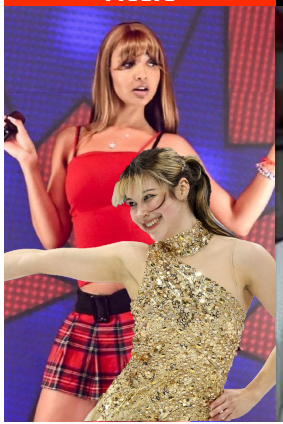


Base: US Gen Z who have interest in sports/athletes (n=1823)

SO WHAT EXACTLY IS A SIDE-DOOR?

THE SCORE ACCORDING TO GEN Z

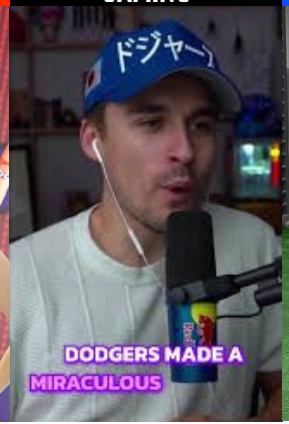
MUSIC



Two focus group participants said they first got interested in Olympian Alysa Liu because she used PinkPantheress' song Stateside in her exhibition.

After her performance, the months-old song hit No. 1 on Billboard's global 200.

GAMING



"I watch this video game streamer Ludwig on Twitch. Before him, I wouldn't have known anything about the Dodgers, but he always had a game streaming on his phone next to him. I got curious."

- Focus Group Participant

GOSSIP



"I had no idea who he was, but I saw photos of Charles LeClerc and his wife and thought they were so cute. So then I got into F1 and now I'm obsessed with it. I watch every race."

- Focus Group Participant

FILM + TV



"In high school, some of the worst people I knew either liked sports or played sports. So I always had that bad association. After Heated Rivalry, my friends and I were like 'oh my god, we have to go.' Boy aquarium!"

- Focus Group Participant

FAN EDITS



"There was this TikTok trend of people editing F1 drivers to Taylor Swift songs. I'm a huge fan of her so it popped up on my feed. That's basically how my interest started. Then I watched Drive to Survive. I would love to go to a GP."

- Focus Group Participant

FASHION



"In the NBA, I love the Rockets because I'm from Houston. But I actually follow individual athletes more than teams. For example, I follow OKC because of Shai Gilgeous-Alexander and his fashion."

- Aminee, Think Tank Participant

MACRO-THEME 1: THE SIDE-DOOR

SIDE-DOORS: FIFA WORLD CUP EDITION

As millions descend on the U.S. for the World Cup, ordinary fans are becoming social media sensations.

Fans documenting their first Waffle House visit, a barbecue stop, or an unexpectedly joyful interaction are reaching millions of viewers who care about the journey just as much as (if not more than) the matches.

Some of the World Cup's biggest breakout stars aren't even players

FREDDYLA7



German fan FreddyLA7 gained over 750K X followers showing his road trip across the U.S. without ever showing his face.

Highlights included Waffle House, Taco Bell, and Buc-ee's, plus a VIP invite to an Ella Langley concert, a 5-star hotel stay courtesy of JJ Watt, and a visit to NASA HQ.

HIRO NAKI



A clip of Japanese fan Hirochika Nakakuki sharing his excitement with a DFW news anchor earned hundreds of millions of views, proving tournament joy knows no language barriers.

BOB



Japanese fan Bob challenged himself to travel SEA->LA->MIA->NYC with $0. Along the way, he gained new friends (and followers) enamored by his positive attitude.

One fan favorite isn't even human

European fans fell in love with ranch dressing. American fans fell in love with European fans falling in love with ranch dressing. Kraft-Heinz, Applebee's, and even the TSA got in on the action, turning ranch into the Cup's hottest souvenir.



MACRO-THEME 1: THE SIDE-DOOR

FOR ATHLETES

Winning games is no longer the primary path to winning fans



25% of Gen Z would rather follow an athlete's personal story than watch them compete.

32% of those aged 18-29 agree that they support individual athletes over specific teams.
vs. 20% of those aged 30+
[YouGov Profiles 2026-06-21]

One fan might be there for the 3-point percentage. Another is there for the tunnel walk. And a third because of who they're dating.

All eyes on the same player, but they're looking at completely different things.

Athletes figured this out first. Teams and leagues are catching up. And smart brands are realizing that if you build on the ecosystem *around* the game, the fans will come.



WHAT THE SIDE-DOOR MEANS FOR BRANDS

SUBCULTURE IS THE NEW Fan acquisition channel

The game still matters. But fandom increasingly starts elsewhere. And the brands winning Gen Z aren’t waiting at the front door anymore.

01

Meet fans where the side-door is

Music, gaming, fashion, gossip, and fan edits aren't add-ons anymore. They’re key to reaching existing fans *and* converting new fans.

02

The ecosystem is the opportunity

The opportunity isn't just on the field. It's in the conversations, communities, and culture around it.

03

Short-term fandom is still fandom

Someone who shows up for one week around the Olympics, World Cup, or a viral moment is still a fan. Don't confuse casual with unimportant.

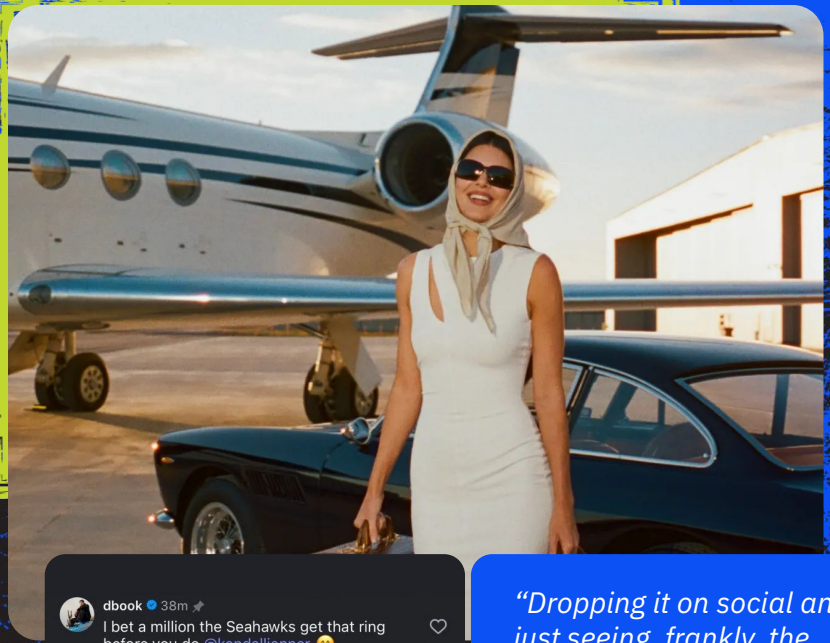
A BRAND DOING IT RIGHT

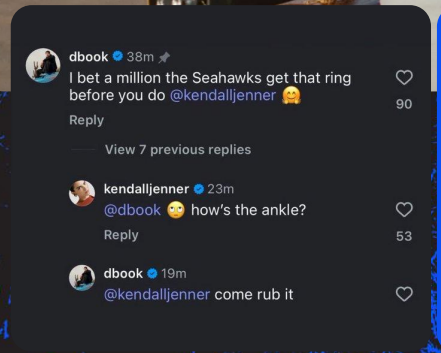
FANATICS SPORTSBOOK x KENDALL JENNER

"Bet on Kendall" — Super Bowl LX, 2026

Fanatics' first-ever Super Bowl spot tapped into the long-running "Kardashian Kurse" theory that athletes who date a Kardashian (or Jenner) inevitably hit a rough patch. Released just as Jenner's then-beau Bad Bunny was gearing up for the Halftime Show, the spot turned sports gossip into a marketing sensation.

Downloads spiked, "Boyfriend #3" (aka Devin Booker) joined in with a $1M counter-bet against Kendall on Instagram, and the campaign generated its own content ecosystem driven by side-door lore.





"Dropping it on social and just seeing, frankly, the momentum and life it took on for itself was truly incredible. ***It's the definition of going viral."***

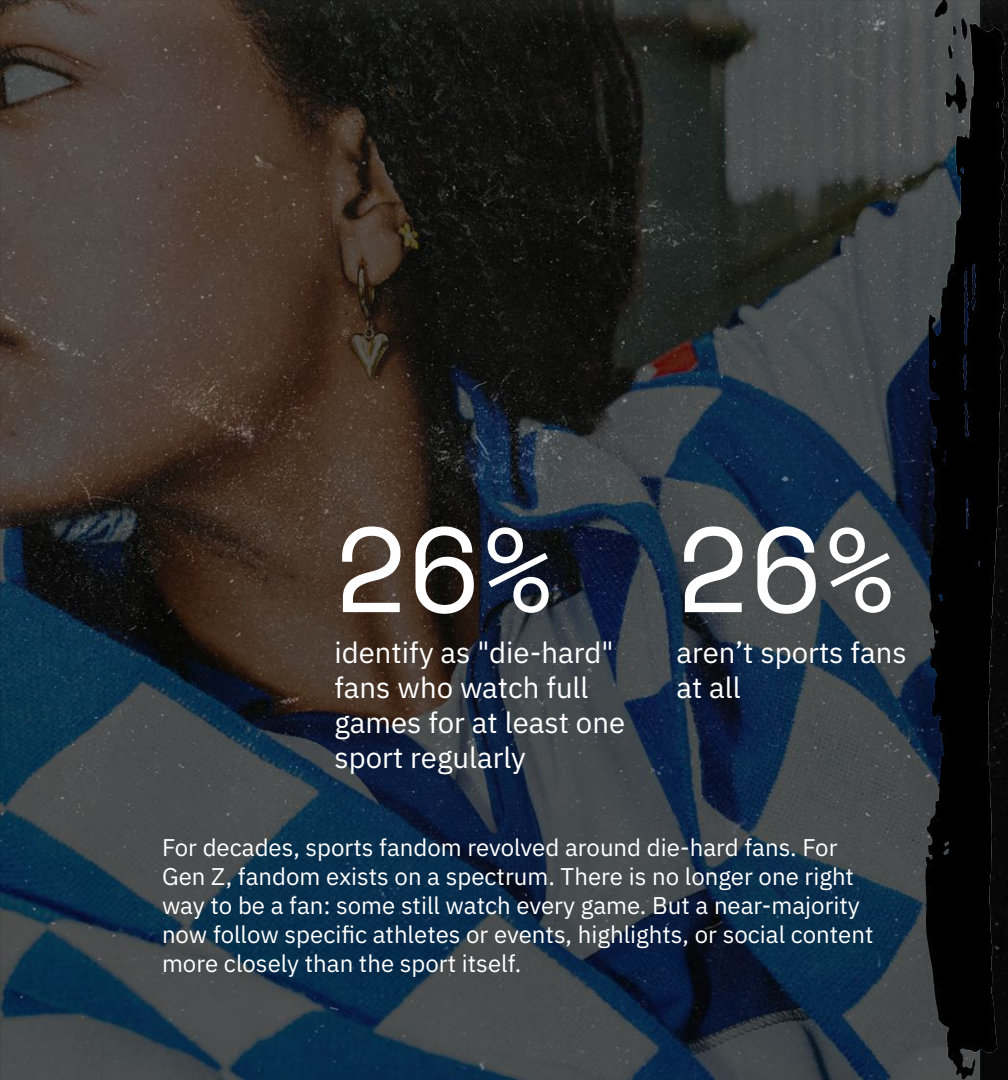


Fanatics CEO Matt King



MACRO - THEME 2

THE NEW BANDWAGON



MACRO-THEME 2: THE NEW BANDWAGON

FANDOM DOESN'T LOOK LIKE IT USED TO

26%
identify as "die-hard" fans who watch full games for at least one sport regularly

26%
aren't sports fans at all

48% FALL SOMEWHERE IN BETWEEN

These are the fans who live between the extremes, following athletes, highlights, social content, or major moments without identifying as die-hards.

For decades, sports fandom revolved around die-hard fans. For Gen Z, fandom exists on a spectrum. There is no longer one right way to be a fan: some still watch every game. But a near-majority now follow specific athletes or events, highlights, or social content more closely than the sport itself.

WE CALL THIS THE NEW BANDWAGON

If the Side-Door is how Gen Z discovers sports, The New Bandwagon explains how they participate in them.

MACRO-THEME 2: THE NEW BANDWAGON

FIVE MODES OF FANDOM

SAME TEAM, DIFFERENT POSITIONS

In the past, sports fandom was defined by what fans did. For Gen Z, it's defined by what they believe. They don't need to watch every game, know every stat, or own season tickets. If they feel connected to a team, athlete, or moment, that's fandom.

ATHLETE-DRIVEN

The athlete carries the fandom. If the athlete leaves the team, the fan follows.

"Getting into Formula One, it isn't about nostalgia, it's because I like the personality of a driver or team principal. As I've gotten older, it's become more about the players." - Focus Group Participant

CONTENT-DRIVEN

An influencer, a meme, a snippet of a play brings the audience. Fandom ignites from the moment, not the sport.

"Social media has brought me into more sports. People were editing the Turkish shooter [Yusuf Dikeç] into the John Wick movies. I didn't even know shooting was an Olympic sport before the memes." - Think Tank Participant Joe Carreon



DRAMA-DRIVEN

The storylines create the fandom. The scandal, the villain, the comeback. The relationships, gossip, and shock factor.

"Did anyone even care about curling before the cheating scandal?" - Focus Group Participant on the "double-touch" scandal at the 2026 Winter Games

TRADITION-DRIVEN

Place, heritage, values. The most durable form of fandom... and most punishing when a team or brand betrays those values.

"Being a sports fan is a behavior, not an identity. I personally believe you have to actively participate or perform something to be part of the fan community." - Focus Group Participant

"The qualifier for what being a fan means is that you have to be there for your team even when they suck." - Focus Group Participant

COMMUNITY-DRIVEN

Group chats, campus circles, the friend who dragged you to your first game. The social experience matters more than who wins.

"You don't have to be a huge fan to sit down and enjoy a sports game, see a competition, and have a good time." - Focus Group Participant

MACRO-THEME 2: THE NEW BANDWAGON

FANDOM HAS NO HOME STADIUM

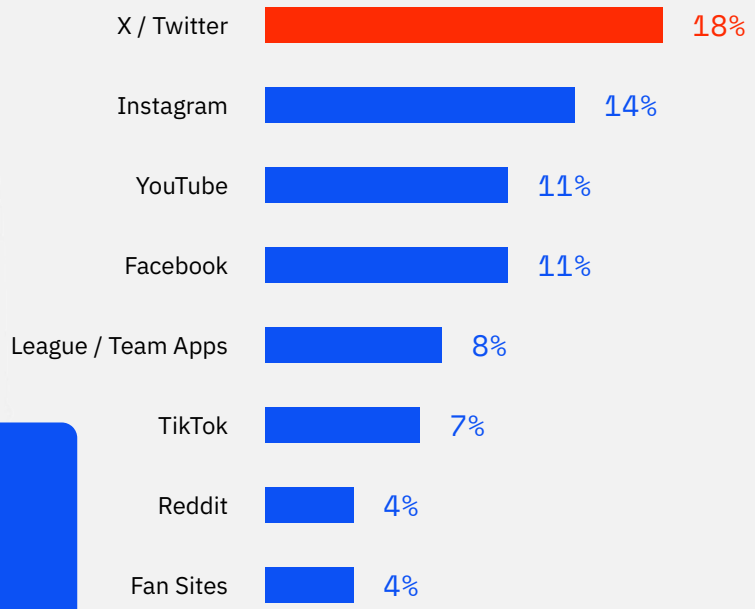
When we asked Gen Z where online sports fandom feels most active, no platform came close to a majority.

Just as there is no single way to be a fan, there is no single place fandom happens online. Communities, conversations, and content are now spread across a fragmented digital ecosystem.

"TikTok edits are super helpful for me. My boyfriend loves F1, and I didn't know anything about it, so the conversation there helped me catch up."
— Focus Group Participant

"The ESPN app is basically the only notification I pay attention to."
— Focus Group Participant

WHERE ONLINE DOES SPORTS FANDOM FEEL MOST ACTIVE?

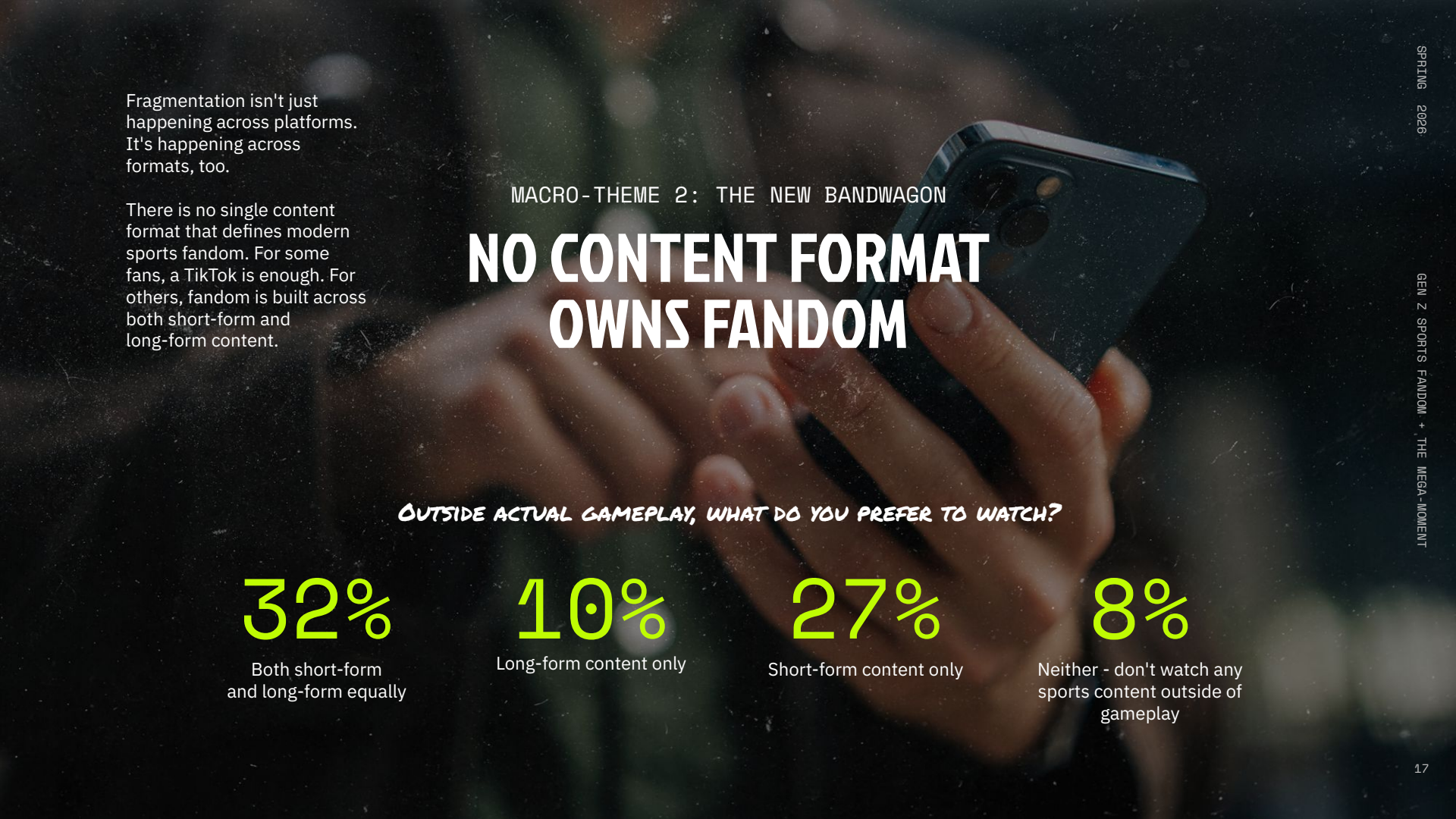


Fragmentation isn't just happening across platforms. It's happening across formats, too.

There is no single content format that defines modern sports fandom. For some fans, a TikTok is enough. For others, fandom is built across both short-form and long-form content.

MACRO-THEME 2: THE NEW BANDWAGON

NO CONTENT FORMAT OWNS FANDOM



Outside actual gameplay, what do you prefer to watch?

32%
Both short-form and long-form equally

10%
Long-form content only

27%
Short-form content only

8%
Neither - don't watch any sports content outside of gameplay

WHAT THE NEW BANDWAGON MEANS FOR BRANDS

STOP MARKETING TO "SPORTS FANS" START MARKETING TO FAN MODES

Gen Z fandom is flexible. Fans follow athletes to new teams, watch highlights instead of games, and become deeply invested in a sport for a single moment.

The New Bandwagon isn't less legitimate it's just less predictable

01

SEGMENT BY MODE, NOT SPORT

Athlete-driven, content-driven, and drama-driven fans are watching the same game, but looking for completely different things. One message won't move all of them.

02

CONTENT IS THE PRODUCT, NOT THE PROMOTION

For the new bandwagon fans, a highlight, edit, or BTS moment isn't marketing for the game, it's where fandom unfolds. Brands with sub-culture native content earn their way into the fan ecosystem.

03

THE DIE-HARD ISN'T DEAD

26% of Gen Z still fits the traditional mold of the die-hard fan. The future of fandom isn't replacing them, it's just expanding what fandom can look like.

A BRAND DOING IT RIGHT

LAY'S FIFA WORLD CUP 2026™



"Jump On, America" — FIFA World Cup 2026

As the FIFA World Cup returns to the U.S. for the first time since 1994, Lay's and Will Ferrell are reclaiming the idea of the "bandwagon fan," turning it from an insult to an invitation.

Rather than rewarding expertise, the campaign rewards participation. It's a positive take on bandwagoning that perfectly aligns with Gen Z's evolving modes of fandom. No gatekeeping (or goalkeeping). No loyalty tests. Just an invitation to jump on.

"People love to pretend you have to pass some kind of test to enjoy the FIFA World Cup. Lay's is basically saying: forget that. Just jump on the Bandwagon, grab some chips, and have fun."



Will Ferrell

MACRO-THEME 3

FULL COURT FANDOM



MACRO-THEME 3: FULL COURT FANDOM

THE GAME IS NO LONGER ENOUGH

For past generations, sports fandom revolved around the game itself. For Gen Z, the game is just part of the experience.

Whether they're watching from home or showing up in person, Gen Z engages deeply with the entire ecosystem around the sport.

The brands winning this moment are the ones that recognize the opportunity isn't just the action on the field, it's everything around it.

FOR GEN Z, THE MOST MEMORABLE PART OF A SPORTING EVENT ISN'T ALWAYS THE SPORT

WHEN THE SIDE DISH BECOMES THE MAIN COURSE



A ballpark staple for over a century

Hot dogs have been part of the baseball experience since at least the early 20th century. You show up, watch the game, hot dog in hand.

Then the 9-9-9 challenge went viral

Nine hot dogs. Nine beers. Nine innings. The 9-9-9 trend transformed an everyday concession item into an event of its own.





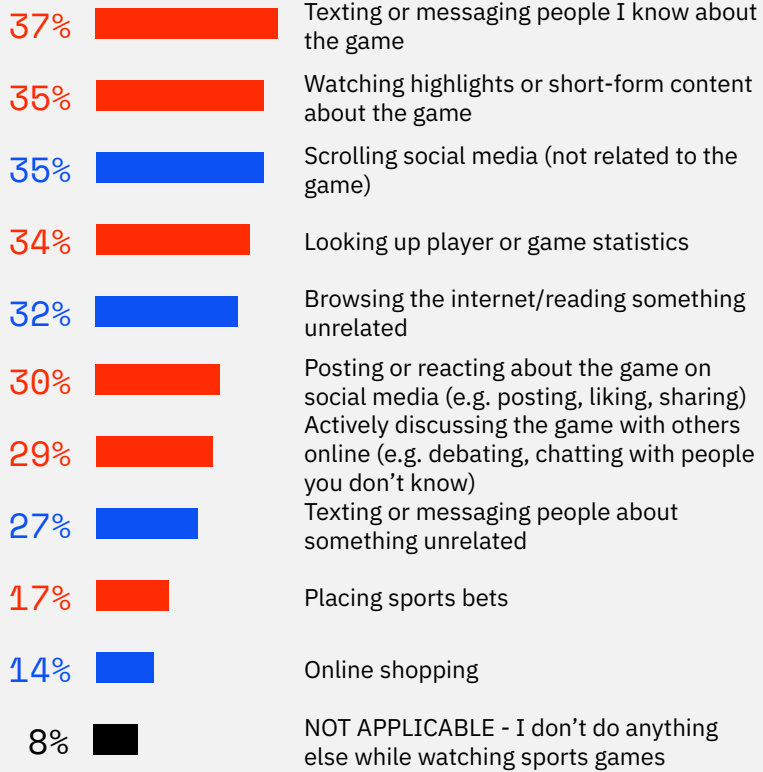
What started online became part of the in-stadium experience

After gaining traction on social media, Philadelphia's Citizens Bank Park officially adopted the challenge during the 2025 postseason. By 2026, it had spread to six stadiums.

MACRO-THEME 3: FULL COURT FANDOM

WHEN THE GAME IS ON, SO IS EVERYTHING ELSE

WHEN YOU ARE ON YOUR PHONE WHILE WATCHING A SPORTS GAME, WHAT ARE YOU DOING?



Base: US Gen Z who watch sports or have any interest in sports/athletes (n=1,654)

THE SECOND SCREEN ISN'T A DISTRACTION IT'S THE DEFAULT SETTING

Just 8% of Gen Z sports fans stay off their phones entirely.

MACRO-THEME 3: FULL COURT FANDOM

LIVE SPORTS ISN'T COMPETING AGAINST OTHER TEAMS

IT'S COMPETING AGAINST STAYING HOME

Gen Z attends fewer live sporting events than older generations.

Between rising ticket prices and an increasingly attractive at-home experience, the game alone often isn't enough to justify attendance.

The live experience has to offer something more.
If it doesn't, Gen Z's default is to stay home.

WHEN ASKED TO SELECT THE THREE TOP DRIVERS THAT WOULD MOST INCREASE GEN Z'S LIKELIHOOD OF PURCHASING A TICKET FOR A LIVE SPORTS EVENT:



Base: US Gen Z (n=2154, select up to 3)

ONLY **46%** **of Gen Z agree that attending live sports events is more enjoyable than watching them on TV** [YouGov Profiles 2026-06-21]

"You can't guarantee that the gameplay will be great [in person]. It's not like a movie where you can read reviews ahead of time. Even if there's a player you want to see, players get injured, or teams just have an off-day. So knowing there's something else there can really help make it feel worth it." -Focus Group Participant

Despite the barriers to attendance, Gen Z still sees value in live sports. Increasingly, that value comes from the extra experiences around the gameplay.

A halftime show, celebrity first pitch, or exclusive merch can make the price of admission feel worth it.

"I only watch the Super Bowl for the Halftime."
- Focus Group Participant

MACRO-THEME 3: FULL COURT FANDOM

THE EXTRAS AREN'T EXTRA ANYMORE

78% of Gen Z sports viewers have attended or would attend a major sporting event primarily for the experience around it — concerts, brand activations, fan festivals — rather than the game itself.

39% already have, **39%** would. Meaning the ecosystem around the game is already driving live attendance.

Base: US Gen Z (select up to 3)



WHAT FULL COURT FANDOM MEANS FOR BRANDS

THE OCCASION IS THE PRODUCT

Brands that show up only for the gameplay miss many of the moments Gen Z actually cares about.

From second-screen content to in-person fan zones, the ecosystem around sports is increasingly where fandom happens.

01

DESIGN FOR THE SECOND SCREEN

Gen Z isn't putting their phone away. Design for the audience that's already watching on two (or more) screens.

02

THE ACTIVATION IS THE TICKET

For a huge share of Gen Z, fan zones and brand pop-ups are the entire reason they show up in person. Brands that make the live experience feel worth it win over Gen Z even when the game disappoints.

03

BUILD FOR MEMORIES, NOT IMPRESSIONS

Gen Z isn’t just buying a ticket. They’re buying stories worth sharing. The moments people post, text, and talk about often matter as much as the game itself.

A BRAND DOING IT RIGHT

HEINEKEN x FORMULA 1

Expanded Multi-Year Global Partnership

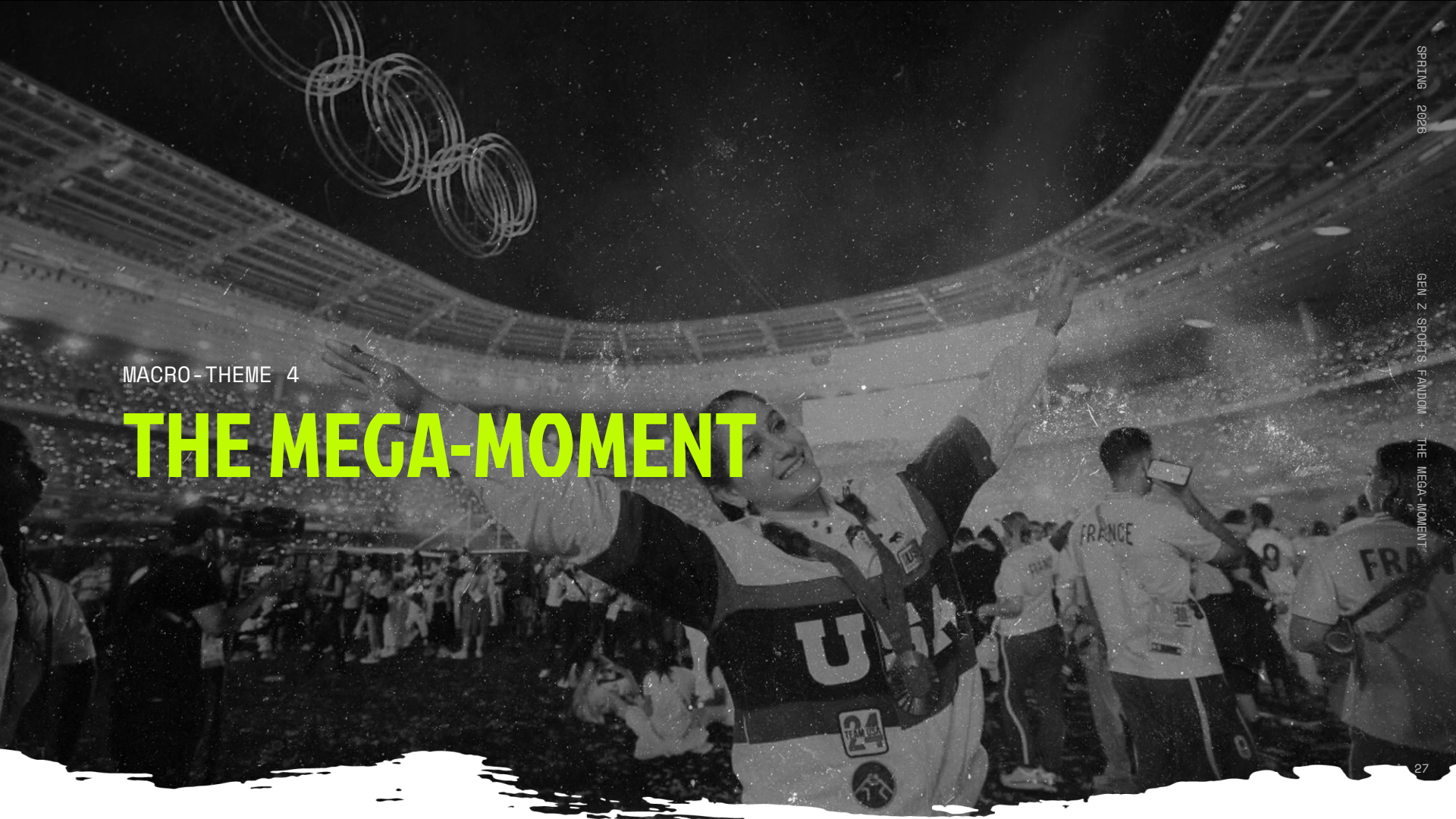
In 2025, Heineken and Formula 1 expanded their global partnership with a focus on enhancing the fan experience on and off the track.

The standout activation was the world's first Season Ticket, sending one fan and a guest to every Grand Prix on the calendar with travel and accommodations included. The prize directly addressed Gen Z's top attendance drivers: inexpensive tickets and the ability to share the experience with friends or family.

Meanwhile, the F1 Fan Zone presented by Heineken 0.0 reflected a broader shift in fan culture. The non-alcoholic offering speaks directly to Gen Z's growing sober-curious mindset, showing how the fan experience is evolving alongside the audience itself.



Brandon Burgess, the first annual recipient of the 2025 Heineken Season Pass, was a 29-year-old who went viral online for vowing to visit every Grand Prix on a budget while working full time.



MACRO-THEME 4

THE MEGA-MOMENT

MACRO-THEME 4: THE MEGA-MOMENT

THE MEGA-MOMENT IS THE ULTIMATE FAN DESTINATION

Gen Z fandom may start in new places and take new forms, but one thing hasn't changed: the mega-moment remains the pinnacle.

Mega-moments bring die-hards, casual fans, and even non-fans together. They offer elite competition, generate mass conversation, and

come with a built-in ecosystem of rituals, activations, and shared experiences that give every type of fan a reason to tap in.











MACRO-THEME 4: THE MEGA-MOMENT

GO BIG OR GO HOME

For Gen Z, mega-moments concentrate everything great about sports into a single event.

Events like the Olympics or a championship game promise to deliver the ecosystem of experiences Gen Z craves.

31% of both Gen Z sports fans and non-fans would choose a mega-event over all else.

Looking at sports fans specifically, the figure rises from 31% to 38% who would choose the mega-event.

Base: US Gen Z

IMAGINE YOU WERE GIVEN $3,000 AND YOU HAD TO SPEND IT ON ONE OF THE FOLLOWING SPORTS EXPERIENCES. WHICH ONE, IF ANY, OF THE FOLLOWING WOULD YOU CHOOSE TO ATTEND?



MACRO-THEME 4: THE MEGA-MOMENT

FOR THE RIGHT MOMENT...

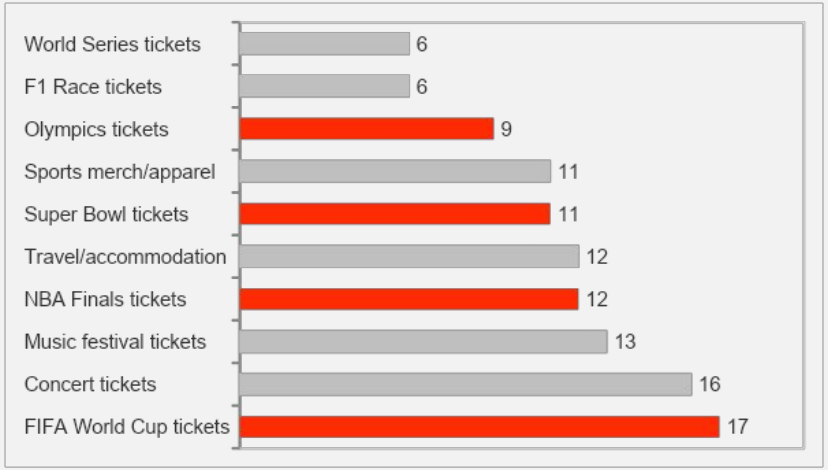
GEN Z WILL FIND A WAY TO BE THERE

BNPL is having a moment. You can finance everything from festival tickets, which 60% of Coachella 2025 attendees did according to a Billboard study, to a burrito on Doordash. Yet for all the attention BNPL gets, Gen Z sports fans seem less enthusiastic about using it than the broader cultural conversation would suggest. Exactly half of Gen Z says they wouldn't use Buy Now, Pay Later services at all.

Among those who would, 34% would use it for FIFA World Cup, followed by 32% who would use it for concert tickets. Which explains why the World Cup is integrating their first-ever halftime show (more on this later).

BUY NOW, PAY LATER: SPORTS + LIVE EVENTS

% of Gen Z who have used or would use BNPL/financing for each:



50% of Gen Z say they don't/wouldn't use BNPL at all — but for the half who would, live sports and entertainment lead the category.

Base: US Gen Z (n=2,154)

WHAT THE MEGA-MOMENT MEANS FOR BRANDS

THE MEGA-MOMENT IS THE PEAK

Gen Z fandom may be fragmented day-to-day, but events like the Olympics and World Cup still unite audiences at massive scale. **The mega-moment remains the ultimate concentration of attention, participation, and spending.**

01

MEGA-MOMENTS, MEGA-VALUE

World Cups, Olympics, and other mega-events attract audiences and their wallets even when presented against several regular season games. For many Gen Zs, these are the moments worth budgeting, or even financing, for. Once-in-a-lifetime beats out the noise of a regular season every time.

02

THE COMPETITION IS ONLY PART OF THE ENTERTAINMENT

Gen Z expects and loves when mega-moments are multi-modal entertainment: brands that bring in music, fashion, or a celebrity guest turn the mega-moment into a full-funnel fandom experience that appeals to the many ways Gen Z wants to be entertained.

03

PLAN FOR THE MOMENT BEFORE THE MOMENT

Gen Z doesn't show up cold to mega-moments. Often, they arrive already invested through athlete storylines and viral content that builds anticipation. Brands that start honing their relevance in the lead-up earn the right to show up at the peak.

A BRAND DOING IT RIGHT

FIFA WORLD CUP FINAL HALFTIME SHOW

Madonna, Shakira, and BTS

For the first time ever, FIFA is adding a Super Bowl-style halftime show to the World Cup Final. Curated by Coldplay's Chris Martin, the performance brings together Madonna, Shakira, and BTS, combining pop, Latin, and K-pop music to appeal to different generations and subcultures.



BTS in particular taps into a Gen Z, K-pop-forward audience just as the group is in the midst of a massive comeback following its nearly four-year hiatus.



MACRO-THEME 5

THE ROAD TO LA28







MACRO-THEME 5: THE ROAD TO LA28

3 MEGA-MOMENTS ONE CITY

FIFA World Cup matches, Super Bowl LXI, the Olympics.

These are three events that reshape culture, command the internet, and turn casual spectators into overnight fans.

And over the next few years, every one of these events, and every theme in this report, plays out in Los Angeles.

This is the road to LA28

MACRO-THEME 5: THE ROAD TO LA28

THE OLYMPICS HAVE A GEN Z PERCEPTION PROBLEM

LA28 will be the most significant sports mega-moment on American soil in a generation. Yet before it even begins, LA28 faces a challenge: many Gen Zs don't feel connected to the Olympics.

Only 23% of Gen Z say they follow and engage with the Olympics (either Summer or Winter Games). Nearly as many feel disengaged, while others see the Games as overly corporate or just not designed for people like them.

The challenge isn't awareness, it's relevance

37%
Have no interested in attending the Olympics in person

21%
Think they should care about the Olympics, but don't feel very engaged

20%
Agree the Olympics feel overly commercialized or corporate

11%
Don't feel like the Olympics are for people like them



When given a list of options to select two from for what would most increase their interest in the 2028 Summer Olympics, Gen Z selected the following:

34%

Viral moments and/or social media content

29%

Cultural events around the games (e.g. brand pop-ups, concerts, parties, etc.)

26%

Knowing specific athletes' personal stories

21%

National pride during marquee events

20%

A creator, influencer, or celebrity I follow being involved

Only 9% of Gen Z sports fans and non-fans responded "Not applicable – I am not interested in the Summer Olympics"

MACRO-THEME 5: THE ROAD TO LA28

LA28 IS THE PROVING GROUND

Gen Z is open to engaging with the Olympics, but they expect more.

They want more than competition. They want the Games to feel more social, more cultural, and more personal.

And the appetite is there. Nearly two-thirds (65%) say they would definitely, or potentially, watch a *Drive to Survive*-style Olympics series that follows athletes and personalities through the Games.

Gen Z wants to go deeper into the lore, characters, and world-building of the Olympics

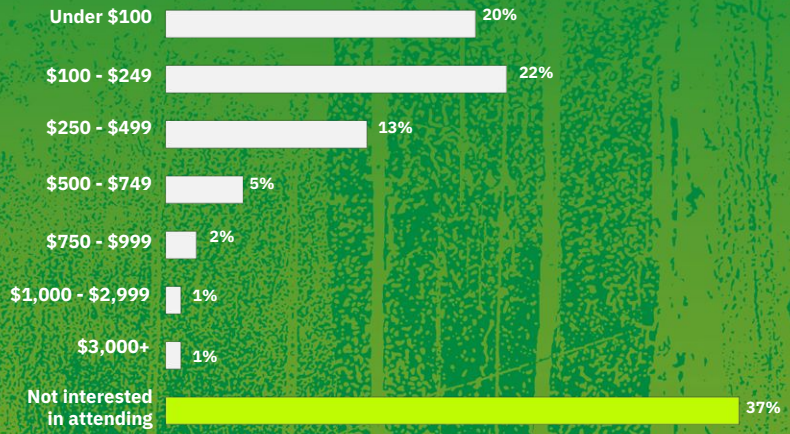
MACRO-THEME 5: THE ROAD TO LA28

GEN Z WANTS IN. CAN THEY AFFORD IT?

More than 2 out of 5 Gen Z won't spend $250 or more on a single Olympic ticket, putting many of the Games' most coveted events out of reach.

While LA28 promoted tickets starting at $28, the supply of lower-priced tickets was limited, and premium events like the Opening Ceremony quickly climbed far beyond what most Gen Zs say they're willing to spend.

For them, the barrier isn't wanting to attend. It's feeling like they can afford it.



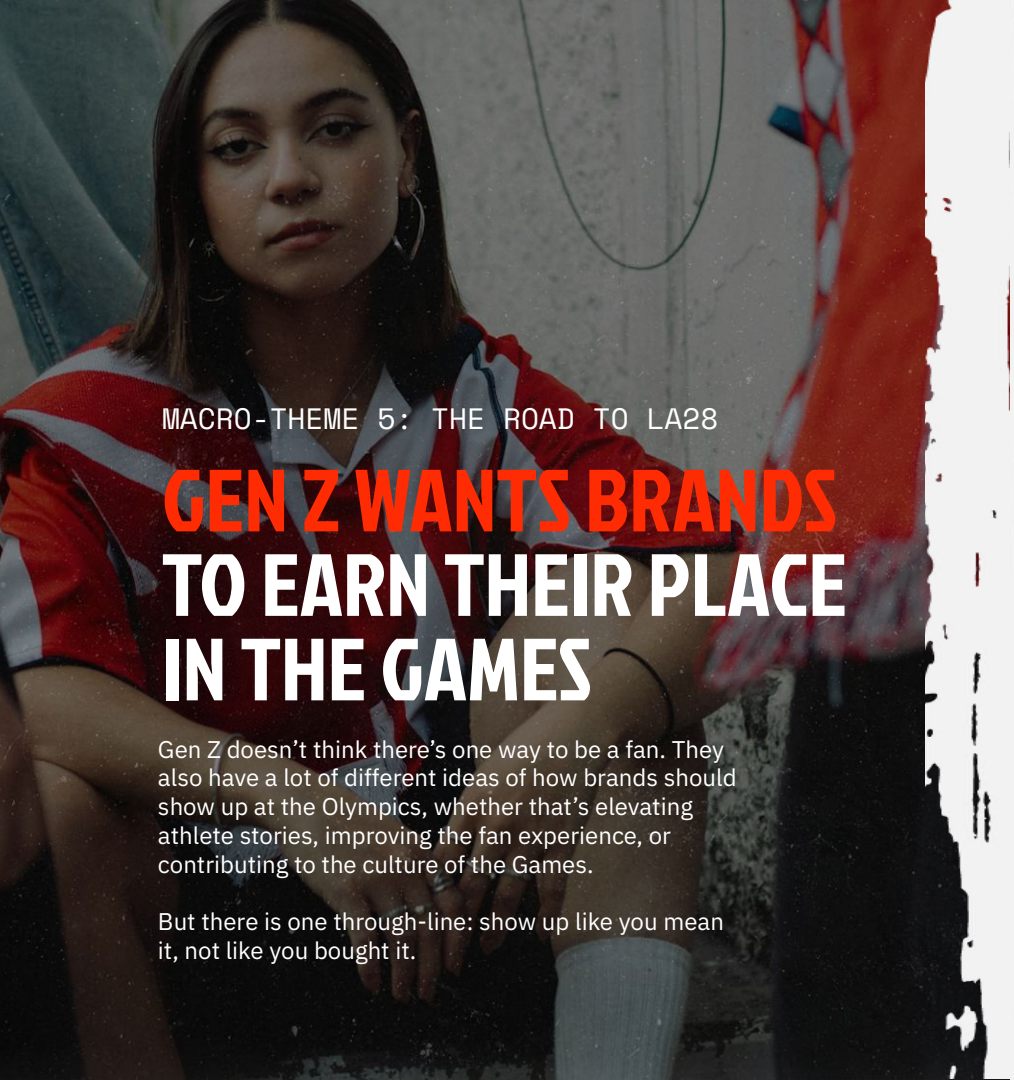
27% of Gen Z is interested in attending the Olympics, but feel it's financially out of reach

"My fear is that there are going to be two Olympics. One for the influencers and the very wealthy, and one for the common people."

— Focus Group Participant

"I feel like LA is going to be very different. It's going to feel more accessible. But also more exclusive at the same time."

— Focus Group Participant



MACRO-THEME 5: THE ROAD TO LA28

GEN Z WANTS BRANDS TO EARN THEIR PLACE IN THE GAMES

Gen Z doesn't think there's one way to be a fan. They also have a lot of different ideas of how brands should show up at the Olympics, whether that's elevating athlete stories, improving the fan experience, or contributing to the culture of the Games.

But there is one through-line: show up like you mean it, not like you bought it.

WHEN IT COMES TO BRANDS AND THE OLYMPICS, WHICH ONE, IF ANY OF THE FOLLOWING, WOULD YOU MOST WANT BRANDS TO DO?

14%
Celebrate athletes as full human beings, not just competitors

13%
Improve how I watch or experience the Olympics

12%
Show that they actually love the sport, versus buying their way in

12%
Prove that they support athletes year-round, not just every four years

11%
Be part of the culture surrounding the Olympics, not just the athletics

11%
Stay out of it – the Olympics don't need a brand angle

Base: US Gen Z who think about the Olympics (n=1806)



MACRO-THEME 5: THE ROAD TO LA28

WHAT THE ROAD TO LA28 SHOULD LOOK LIKE FOR BRANDS

The opportunity isn't the IOC logo. It's contribution to the athletes, the fans, and the ecosystem.

The Olympics is a platform, not just a sponsorship

01

CELEBRATE THE WHOLE ATHLETE

Personal stories, not just podium moments. Gen Z wants to know the person behind the performance.

02

PROVE THEY WERE THERE BEFORE

Show up more than every four years. The road to the Olympics is long. Your brand's commitment should follow suit.

03

BE IN THE ECOSYSTEM

The logo isn't the play. The energy around the event is. Concerts, activations, cultural moments are where fandom increasingly happens.

A BRAND DOING IT RIGHT

AIRBNB x THE OLYMPICS

Since 2019, Airbnb has partnered with the IOC on a nine-year agreement designed to support athletes year-round while creating new ways for fans to engage with the Olympic movement between Games.

Rather than focusing solely on sponsorship visibility, Airbnb has invested in athlete support, athlete-led experiences, and cultural programming beyond the competition.

Multi-Year Global Partnership



AIRBNB ATHLETE TRAVEL GRANTS & AIRBNB500

A $40M, 9-year pledge of travel grants that support elite athletes as they train, compete, relax and recover in over 100 countries around the world. It's a tangible commitment to the athletes, year-round.

AIRBNB OLYMPIAN EXPERIENCES

Partnering with Olympians, Airbnb has created hundreds of athlete-hosted experiences that let fans connect with their favorite athletes. The program included 26 experiences timed to the 2026 Winter Games–and priced at only $30/per person.

CASA AIRBNB @ THE WINTER OLYMPICS 2026

A free-to-attend brand hub with DJ sets, athlete talks, and Olympian-led programming that brought fans closer to athletes they love: Italian cooking classes, waffle making with Team GB freeskier Zoe Atkin, curling clinics with world champ Brent Laing counted among the offerings.

"BRING IT HOME" CAMPAIGN

For the Winter Games, Airbnb released a mini-doc and ads featuring interviews with athletes like Mexico's first Winter Olympian in 30+ years Donovan Carillo, giving audiences a chance to get to know athletes on a deeply personal level.

MACRO-THEME 6

EMERGING FORMS OF FANDOM

LA28 will be the first Summer Olympics where AI-generated sports content and widespread legal sports betting are both fully present at scale. We don’t yet know what that does to the experience. But we can read the current signals.



MACRO-THEME 6: EMERGING FORMS OF FANDOM

DON'T BET ON GEN Z'S LOVE OF SPORTS BETTING

Sports betting is growing, particularly among Gen Z, but many of these fans worry about what it changes.

Gen Z is more than twice as likely to view the rise of sports betting negatively than positively. The concern isn't necessarily betting itself, but more so what betting might do to the experience of fandom.

36% of Gen Z (aged 21+) agree that widespread sports betting makes fans care more about money than sports.

"Sports betting makes it more interesting to watch — but I feel like it changes why people watch. They stop caring about the sport and start caring about the money."
— Focus Group Participant

How do you feel about sports betting becoming a more popular part of the sports experience?

[Base: US Gen Z age 21+]

33%
I don't like it – I would never participate in sports betting

25%
I'm neutral – it doesn't affect how I engage with sports

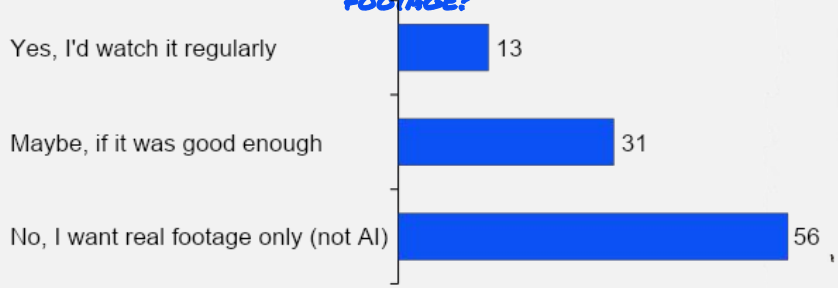
11%
I'm into it – it makes sports more interesting

9%
I like it – I actively participate in sports betting

9%
I'm concerned – sports betting feels predatory

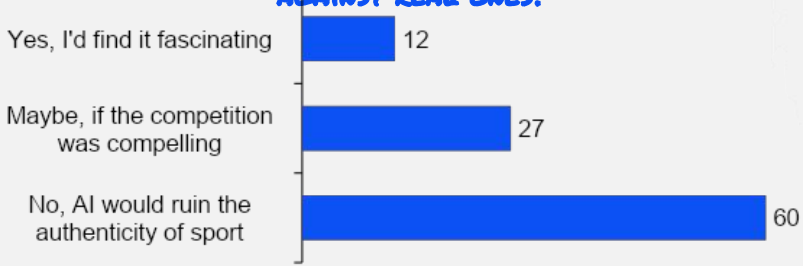
Overall, 48% of Gen Z considers the rising popularity of sports betting to be negative, versus 20% who view it positively.

WOULD YOU WATCH A HYPOTHETICAL AI-GENERATED SPORTS HIGHLIGHT REEL THAT WAS PERSONALIZED ENTIRELY TO YOUR INTERESTS, EVEN IF IT WASN'T REAL FOOTAGE?



Base: US Gen Z who have interest in sports/athletes (n=1817)

WOULD YOU WATCH A SPORTING EVENT THAT FEATURED AI-GENERATED OR SIMULATED ATHLETES COMPETING AGAINST REAL ONES?



Base: US Gen Z who have interest in sports/athletes (n=1817)

MACRO-THEME 6: EMERGING FORMS OF FANDOM

GEN Z STILL WANTS REAL SPORTS (FOR NOW)

LA28 will be the first Summer Olympics where AI-generated sports content operates at scale: personalized highlights, synthetic commentary, AI-assisted broadcast. The IOC has already published official guidelines for their use of AI, focused on keeping it human-centered and optimizing their internal operations.

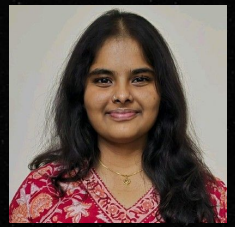
One day, Gen Z might watch an Olympic match-up between [OLD CHAMPION] and [NEW ONE]. At least for now, Gen Z fans want real footage of real competitors.

But we'll check back in in 2028.

MEET THE USC ANNENBERG x ACC THINK TANK TEAM


JADA BEAN


JOSEPH CARREON


SOWMYA CHANDRASEKARAN


A.J. DOMINGO


YANA GARANKOVA


ELIZABETH GUTIERREZ


NATALIE LOPEZ


NATALIE LOPEZ


ANVI MAHAJAN

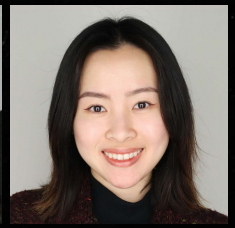

VIANGELLY PEÑA


JESSICA PHAN


AYMON RENTUMA


SOPHIE SCHAKED


AMINEE SIRIBOE


ANNIE YANG

USC ANNENBERG x ACC THINK TANK LEADERSHIP TEAM



MICHAEL NYMAN

Founder & CEO, Acceleration Community of Companies

Co-Chair, Board of Councilors, USC Annenberg



MONICA CHUN

President, Acceleration Community of Companies



MATTHEW LE VEQUE

Professor of Professional Practice Public Relations and Advertising, USC Annenberg



MADISON GRUBB

Director of Strategy, Acceleration Community of Companies



MICHAEL KITTILSON

Sr. Strategist, Applied AI, Acceleration Community of Companies

USC Annenberg X ACC Think Tank Member ‘24, ‘25



ANA BLANCO

Account Executive, Acceleration Community of Companies



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