



THE FAN CONNECTION CRISIS:

WHAT BRANDS ARE MISSING IN CONNECTING WITH THE
MOST PASSIONATE AUDIENCES IN MARKETING

Sports fans represent one of the most emotionally engaged and culturally expressive audiences in marketing. They're loyal, vocal, and build identity around the teams, players, and rituals they love. This should be the ideal environment for brands to thrive. Yet in many cases, they don't.

The disconnect is striking. Brands pour billions into sports marketing, securing naming rights, sponsorships, and prime advertising spots. They're everywhere fans look. But visibility alone doesn't guarantee connection.

In partnership with BERA.ai, this research examines how brands across five major industries are performing with sports fans. The analysis measures six key drivers of emotional connection, moving beyond awareness and recall to understand what actually makes fans care about brands.

The findings reveal a fundamental gap between brand investment and brand resonance. Most brands are showing up in sports, but they're showing up in ways that fail to connect with what fans actually value. They're focused on visibility when the real opportunity lies in building genuine cultural relevance.

The sports marketing landscape is at a crossroads. Success requires more than presence. It requires understanding fan culture, participating authentically in it, and building relationships that extend beyond transactions. The brands that recognize this shift will have a significant advantage over those that continue to prioritize reach over resonance.

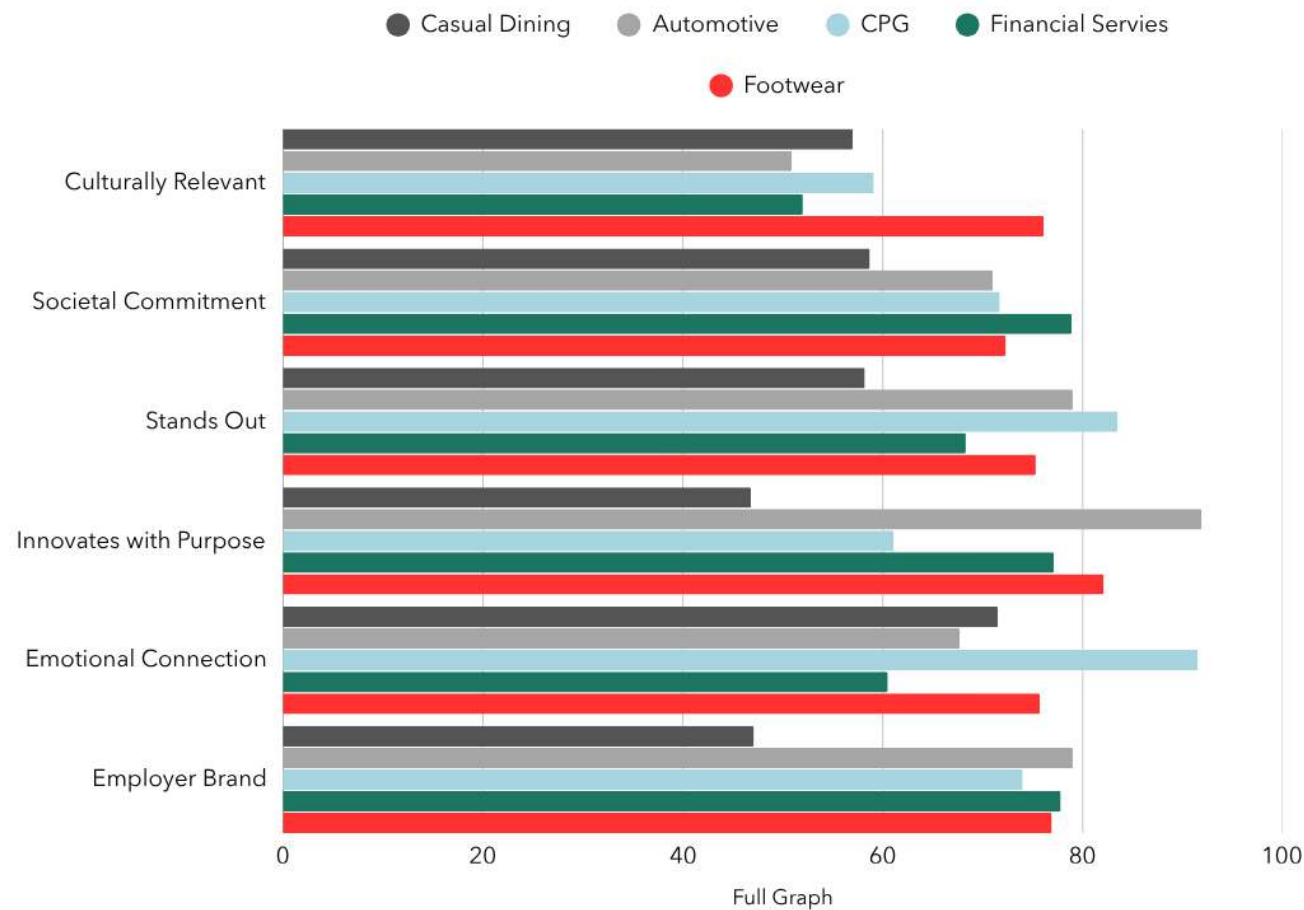
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MikeWorldWide

WE EVALUATED HOW FANS PERCEIVE BRANDS IN FIVE KEY CATEGORIES WITH SIGNIFICANT INVESTMENT IN SPORTS MARKETING.



INDUSTRIES INCLUDED

- Automotive
- Casual Dining
- Consumer Packaged Goods (CPG)
- Financial Services
- Footwear

THE SIX DRIVERS OF BRAND CONNECTION WE TESTED:

- Culturally Relevant: Does the brand feel part of the conversations fans care about?
- Stands Out: Is it distinctive compared to competitors?
- Emotional Connection: Does the brand evoke any real personal feeling?
- Innovates with Purpose: Is it seen as forward-thinking for a reason?
- Societal Commitment: Is it seen as doing more than chasing profit?
- Employer Brand: Would people be proud to work there or associate with it?

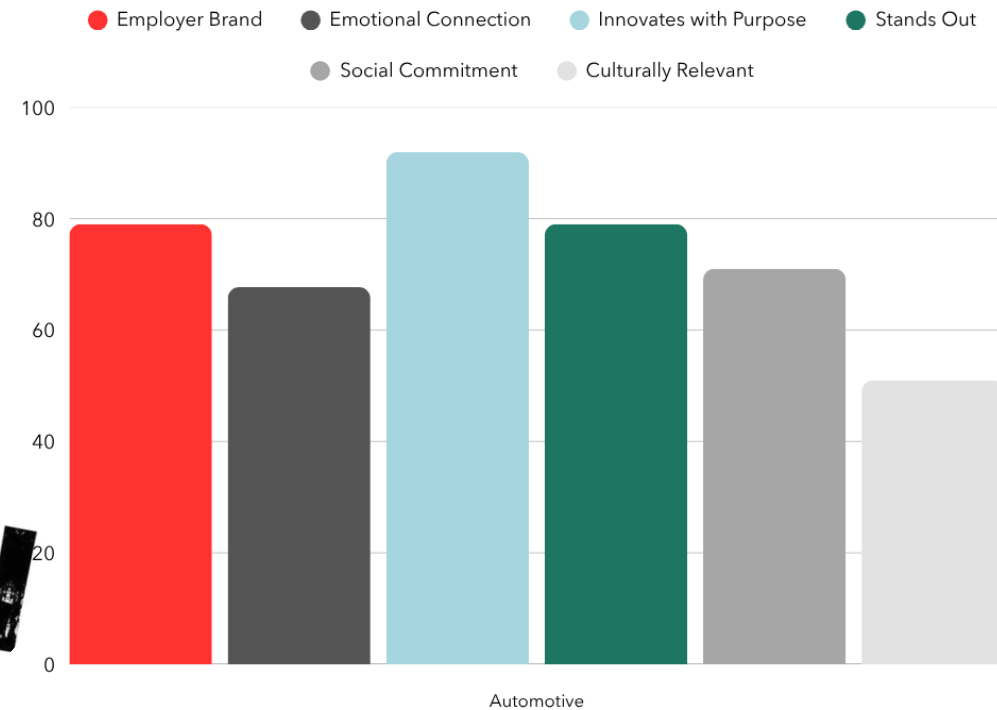
Each metric was percentile-ranked based on responses from sports fans who were familiar with the brand.

AUTOMOTIVE: ALL ENGINE, NO HEART

Automotive brands know how to turn heads. They lead the way in standing out and innovating with purpose, reflecting a long-standing focus on performance, design, and pushing the category forward. Fans see these brands as powerful and advanced.

But they also feel distant. Automotive underperforms in emotional connection and societal commitment, which tells us that while fans admire these brands, they don't feel especially close to them. There's a gap between technological leadership and emotional relevance.

These brands are present in the fan experience, but they aren't personal. They don't reflect the kind of loyalty and shared identity that defines sports culture.



THE PLAY

Use the power of storytelling to shift from spectacle to substance.

Automotive brands can build stronger ties with fans by connecting innovation to real-life journeys—community, pride, tradition, even struggle.

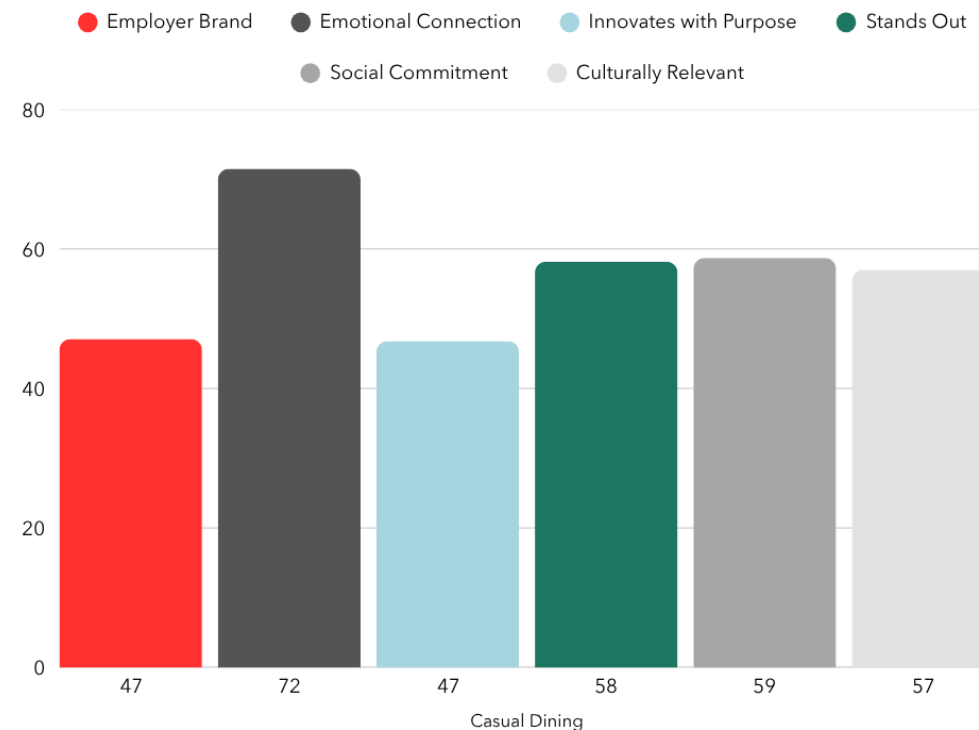
The goal isn't to stop impressing, but to start relating.

CASUAL DINING: PRESENT BUT INVISIBLE

Casual dining should be one of the most emotionally rich categories in sports. These are the places fans gather before games, celebrate after wins, and commiserate after losses. In theory, the category has home-field advantage.

But the numbers tell a different story. Casual dining brands rank near the bottom in cultural relevance, standing out, and innovating with purpose. They're present, but not memorable. Familiar, but not distinctive. They've become background noise in the fan experience.

It's not that fans dislike these brands—they just don't notice them. And in a world driven by emotional connection, invisibility is a major risk.



THE PLAY

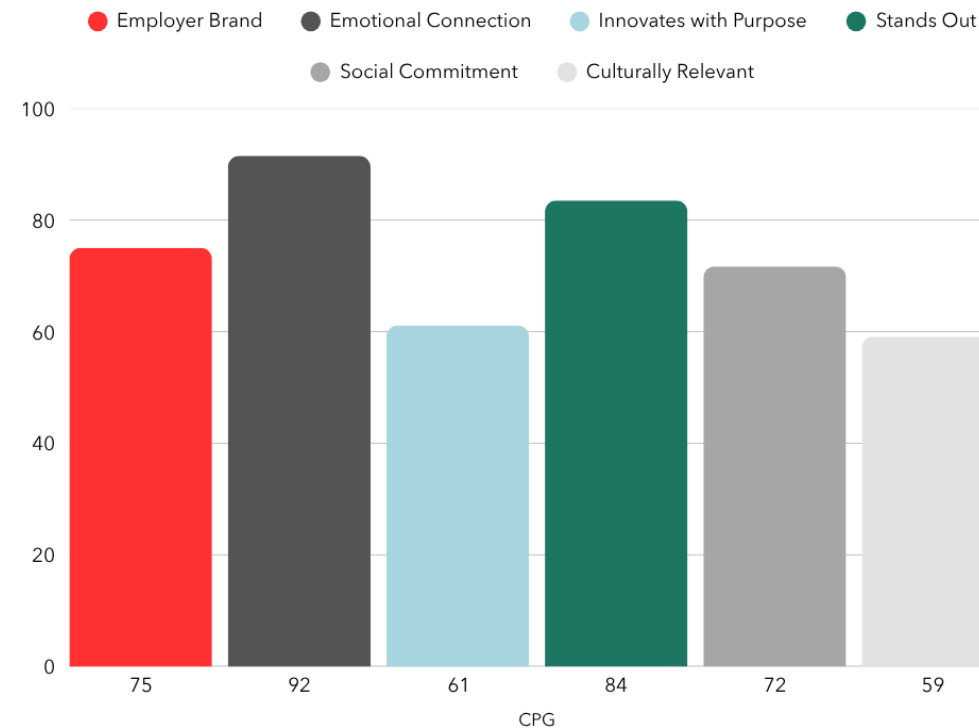
Start treating the fan experience like a cultural moment, rather than a transaction. Casual Dining establishments in this space should own their role in game day rituals, create moments that feel shareable and communal, and build identity into the dining experience beyond just meals.

CPG: THE GOLDILOCKS PROBLEM

CPG brands consistently earn high scores in emotional connection and employer brand. They're familiar, trusted, and almost always within arm's reach. They're part of everyday fan life.

But that closeness can work against them. These brands underperform slightly in cultural relevance and innovating with purpose. Fans like them, but don't get excited about them. They're seen as safe and functional—nothing more.

The issue isn't what these brands are doing wrong. It's what they're not doing at all: surprising, evolving, or actively participating in fan culture.



THE PLAY

CPG brands have achieved something valuable. They're trusted and emotionally present. But they're also undifferentiated. There's no spark, no surprise, no reason for fans to choose them over competitors beyond habit and availability.

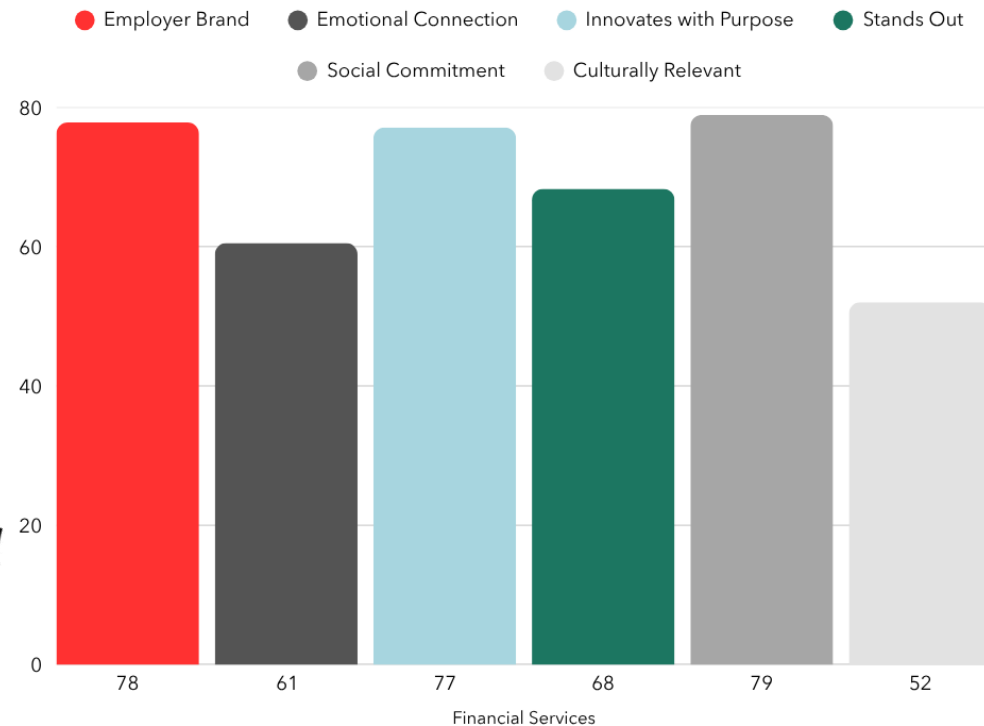


FINANCIAL SERVICES: STABILITY WITHOUT SOUL

Financial brands are built on trust. And it shows—this category performs well in societal commitment and employer brand. Fans see them as responsible and values-driven.

But they lag in cultural relevance and standing out, which suggests something's missing: energy, personality, presence. These brands are respected but rarely remembered.

They often show up as official sponsors, but not as cultural participants. In an environment where emotion and allegiance drive everything, that kind of distance makes it hard to connect.



THE PLAY

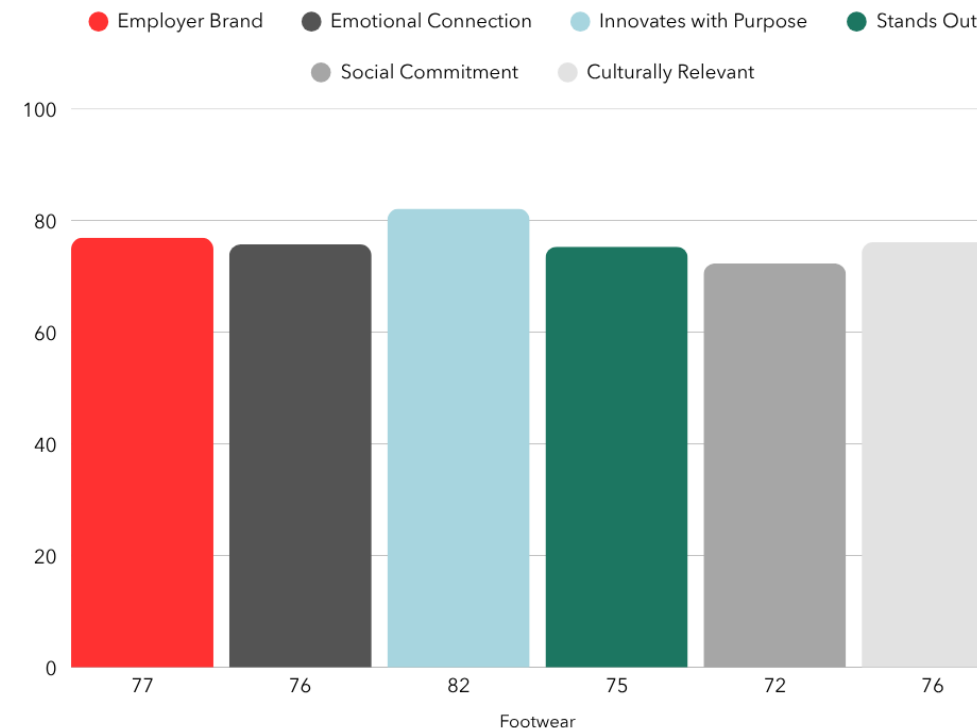
Translate values into emotional relevance. Financial services brands don't need to be flashy, but they do need to be human. Speak to real-life goals—like community investment, generational security, or shared wins—and you'll get closer to the fan's identity.

FOOTWEAR: THE GOLD STANDARD

Footwear is the benchmark for how to connect. These brands perform strongly across all six drivers, especially emotional connection. For fans, footwear is personal. It's a badge, a ritual, a statement.

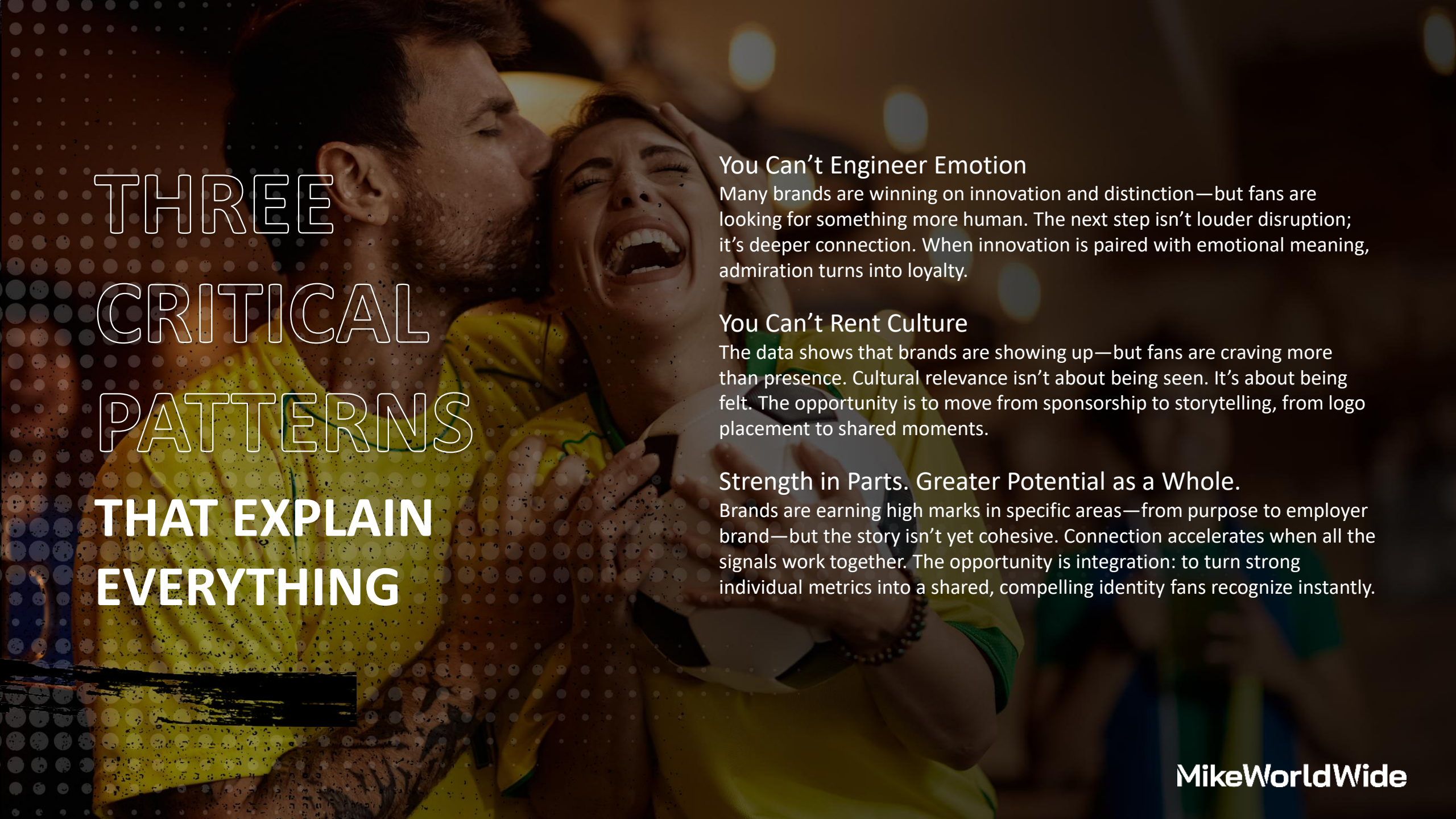
These brands don't just advertise to fans—they understand them. They participate in culture, collaborate with athletes and influencers, and create moments that fans want to share.

They aren't just worn. They're lived in, on the field, in the stands, and on the streets.



THE PLAY

Keep building on what's working. Footwear brands have a head start, but the space is evolving fast. The next wave of connection will come from even deeper collaboration—with fans, communities, and creators—and from products and stories that continue to reflect what it means to belong.

A man with a beard and tattoos is kissing a woman on the cheek. The woman is holding a soccer ball and has a look of pure joy, with her mouth wide open as if screaming or cheering. They are both wearing yellow soccer jerseys. The background is blurred, suggesting a stadium or a large crowd.

THREE CRITICAL PATTERNS THAT EXPLAIN EVERYTHING

You Can't Engineer Emotion

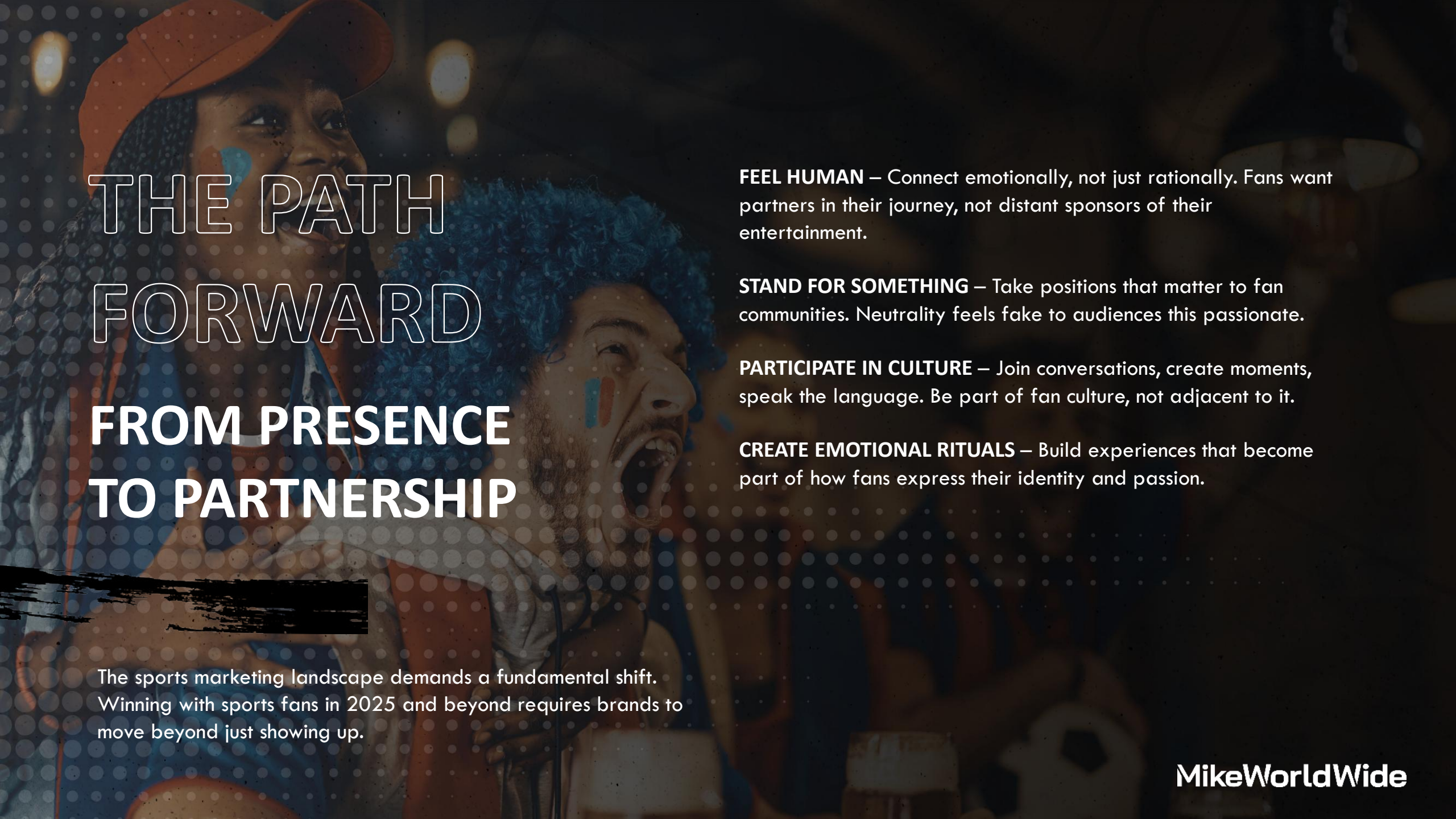
Many brands are winning on innovation and distinction—but fans are looking for something more human. The next step isn't louder disruption; it's deeper connection. When innovation is paired with emotional meaning, admiration turns into loyalty.

You Can't Rent Culture

The data shows that brands are showing up—but fans are craving more than presence. Cultural relevance isn't about being seen. It's about being felt. The opportunity is to move from sponsorship to storytelling, from logo placement to shared moments.

Strength in Parts. Greater Potential as a Whole.

Brands are earning high marks in specific areas—from purpose to employer brand—but the story isn't yet cohesive. Connection accelerates when all the signals work together. The opportunity is integration: to turn strong individual metrics into a shared, compelling identity fans recognize instantly.



THE PATH FORWARD FROM PRESENCE TO PARTNERSHIP

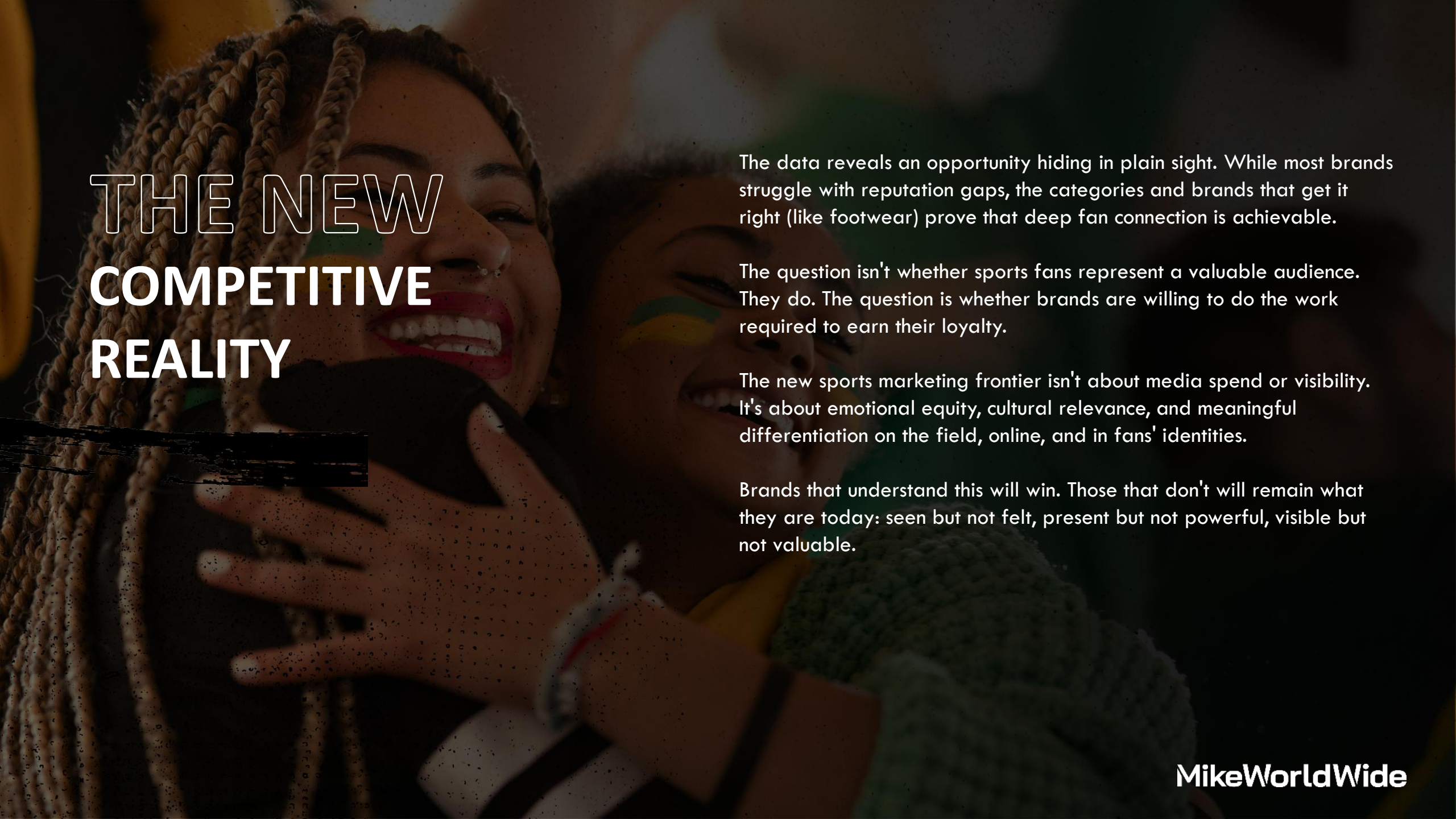
The sports marketing landscape demands a fundamental shift. Winning with sports fans in 2025 and beyond requires brands to move beyond just showing up.

FEEL HUMAN – Connect emotionally, not just rationally. Fans want partners in their journey, not distant sponsors of their entertainment.

STAND FOR SOMETHING – Take positions that matter to fan communities. Neutrality feels fake to audiences this passionate.

PARTICIPATE IN CULTURE – Join conversations, create moments, speak the language. Be part of fan culture, not adjacent to it.

CREATE EMOTIONAL RITUALS – Build experiences that become part of how fans express their identity and passion.

The background of the entire slide is a photograph of two young women with long dreadlocks. They are both smiling and cheering, with their mouths open. They have rainbow-colored face paint on their cheeks. The woman in the foreground is wearing a black jacket and has her hand near her face. The woman behind her is also smiling. The overall tone is energetic and positive.

THE NEW COMPETITIVE REALITY

The data reveals an opportunity hiding in plain sight. While most brands struggle with reputation gaps, the categories and brands that get it right (like footwear) prove that deep fan connection is achievable.

The question isn't whether sports fans represent a valuable audience. They do. The question is whether brands are willing to do the work required to earn their loyalty.

The new sports marketing frontier isn't about media spend or visibility. It's about emotional equity, cultural relevance, and meaningful differentiation on the field, online, and in fans' identities.

Brands that understand this will win. Those that don't will remain what they are today: seen but not felt, present but not powerful, visible but not valuable.