



HAVIAS Play

The Global State of Play

February, 2025



THE GLOBAL STATE OF PLAY

*A look at the trends
shaping passions and
fandom across the world*

Havas Play's mission is to help brands play in culture and, with 400+ experts in 21 countries, we have the local expertise and the global reach to create truly meaningful experiences that are intertwined with consumer passions and activate in the spaces that matter most to people.

We tapped our network of Play experts to take their pulse on the current and future state of fandom around the world. We're proud to share our first Global State of Play, which looks at the global and the local – from regional sports, gaming and music trends to worldwide advancements in AI and hyper personalization – for a deep dive into the technologies, trends and platforms revolutionizing how fans connect with their passions and the brands that support them.

— **Charlie Farrant**

Global Managing Director, Havas Play

THE SPORTS LANDSCAPE SHIFTS TO PASSIONS NEW AND OLD



As hallmark sports competitions across the globe become increasingly expensive for brands and consumers alike, expect a **shift in the sports landscape to niche properties** – with passionate and engaged fan communities – where sponsorship money goes further. **In North America, soccer is poised for an explosion of local fan engagement** during the 2025 FIFA Club World Cup, hosted by the United States, and the 2026 FIFA World Cup, jointly hosted by Canada, Mexico, and the United States.

“Until now, soccer hasn’t had the impact in the United States that other sports have generated,” shared Jez Jowett, Managing Partner, Havas Play North America. “That is all set to change. Infrastructure is in place, sponsorships have been secured, and fans are assembled and hyped. Soccer is about to explode and grab the attention and fandom of the huge American population.”

Women’s sports are also at an inflection point; however, while several successful campaigns have created new, engaged fan communities, barriers to participation persist and audiences are still far behind those of men’s sports.

“2025 is the year for unity – both private and public – to deconstruct stereotypes and harassment of female athletes and bring greater visibility to these inspiring figures,” shared Augustin Penicaud, Vice President, Havas Play France.

Across the world, **traditional sports with established fan communities are being revived**, but with improved infrastructure in place to reach audiences at newfound scale. A prime example is Kabaddi, a South Asian contact team sport that has flourished with the establishment of the Indian Pro Kabaddi League, turning the traditional game into a televised spectacle anticipated to reach 400 million viewers in 2025.

“India’s sports landscape is evolving with a growing appetite for diverse sports,” shared Arun Kumar Rao, Head of Sports, Havas Play India. “Kabaddi has deep roots in rural India and is widely popular across demographics. As infrastructure and support systems improve, we’re seeing it take center stage in India’s growing multi-sport culture.”

In today’s hyper-connected world, even the most **niche sports interests have the potential to ignite a cultural fire**, such as Sky Sport’s coverage of the Premier League Darts world championship, which generated over 10 million views on a single viral X video.

“When we talk about fandom, we usually think moments surrounding dominating basketball, soccer, and NFL leagues,” shared David Pueyo, Head of Havas Play Spain. “The learning this year is clear: there is no small passion in a hyper-connected world where marbles and darts world championships fill stadiums.”

WIDESPREAD GAMING ACCESS ENABLES ENGAGEMENT OPPORTUNITIES FOR BRANDS

With over 3 billion gamers worldwide, gaming is no longer a niche interest. Expect **local communities to flourish as improved infrastructure fuels a favourable environment for online gaming**, streaming platforms, and e-sports competitions across the world.

"With improved internet connectivity and a youthful population, the gaming market is particularly promising in Africa," shared Marc Antoine Koreki, Head of Havas Play, Havas Africa Côte d'Ivoire. "Gaming events such as FEJA and King of the Hill attract players from across the continent, providing branding opportunities for local and international companies looking to reach engaged fan communities."

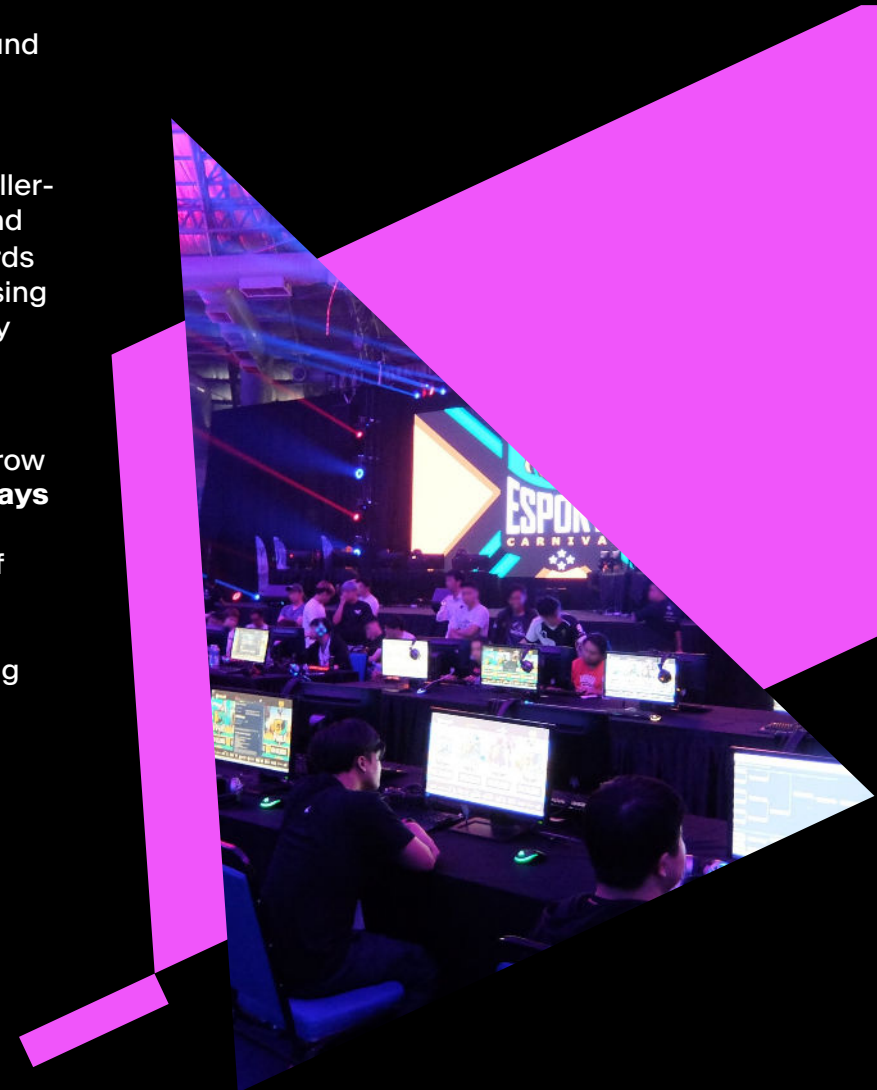
Beyond local growth through infrastructural improvements, **expensive consoles are no longer a barrier to entry for gaming**, with the rise of game-streaming enabling the same premium experience regardless without the need to purchase console.

"Screen-agnostic gaming is the future. For the proof, look no further than Microsoft's This is an Xbox campaign, which highlighted how mobile phones, tablets and laptops can be used a console through Xbox Game Pass," shared Patrick Tierney, Director & Gaming Lead, Havas Play USA. "Gaming is more accessible than ever before, allowing casual gamers to level-up their setup and shift towards more premium gaming experiences."

While a few years ago brands could only activate around the gaming experience through influencers, e-sports partnerships, and gaming content, today there is an **explosion of in-gaming activations that reach gaming audiences** during high-engagement, controller-in-hand moments. From branded skins, cosmetics, and playable maps to ads integrated into in-game billboards and platform homepages, this new frontier of advertising reaches a huge, engaged audience and is increasingly trackable, measurable and effective.

Cross-culture collaborations mean that gaming activations are not only engaging, but they can also grow love for subcultures by **allowing fans new, active ways to experience their passions**, such as fans of Squid Game competing in their favorite challenges in Call of Duty and Mariah Carey lovers playing as their icon in Fortnite. Furthermore, **generative AI and enhanced publisher tools** such as Unreal Editor are empowering creators to build their own gaming experiences that remix IPs, making gaming a new medium for creator storytelling.

"Gen Z is redefining fandom, building communities within games, shaping narratives, and impacting culture," shared Abel Delgado, Innovation Booster, Havas Play Spain.



AI FUELS DEMAND FOR AUTHENTIC CONTENT



For creators and marketers alike, AI is now an essential partner – functioning as an additional team member that can be embedded into daily routines and processes to drive new efficiencies and capabilities.

"I anticipate we are no longer going to talk about 'what AI will be able to do', and instead the conversation will shift to 'what will humans be able to do with AI'," shared David Pueyo, Head of Havas Play Spain. "The future that we're enacting is a hybrid world where, rather than seeing AI as continually in competition with humans, we dedicate our efforts towards seeing what AI and humans can do together."

Expect some of the panic around AI replacing the role of creatives to subside as teams explore practical applications for leveraging **AI that compliment rather than replace existing expertise**, automating routine tasks and serving as a partner for ideation and research.

"For senior creative talent with keen intuition, adept at understanding user needs and storytelling, the assistance AI brings far outweighs the threat," shared Joanne Zhou, General Manager, Havas Play China.

In many ways, **AI will level the playing field**, enabling production capabilities that were previously only available to those with large budgets and big teams to be attainable to all.

"Investing in AI-powered content production is no longer a luxury, but a strategic necessity," shared Kenny Yap, Chief Operating Officer, Havas Play Singapore.

From AI-generated imagery to the use of voice and video AI, new technology has the capability to drive cost-effective content production at scale. However, in a

world where production value is no longer a barrier to entry, **expect authenticity, and 'lo-fi' content to drive engagement and connection with audiences.**

"Prepare for the lo-fi social explosion," shared Miłosz Jacyna, Digital Content Managing Director, Havas Play Poland. "When production capabilities are no longer a point of differentiator, authenticity will mean more than high-value assets that are crafted to perfection."

As consumers increasingly seek out lo-fi content, their social media consumption will shift in turn, with engagement generated by the platforms that succeed in delivering against this growing preference for authenticity.

"Expect consumers to reassess their social habits as they seek out more authentic social content amidst growing fatigue and declining engagement on mainstream channels," shared Prachi Narayan, Head of Content, Havas Play India. "Telegram, Discord, and BeReal are all growing as Gen Z users seek authentic communities."

Beyond consumers' digital footprint, expect offline cultural touchpoints to shift in turn. As streaming platforms such as Spotify dominate the consumption of music, often prioritizing commercial interests over diversity and discovery, **consumers are increasingly shifting to smaller venues and grassroots music events** that have a greater sense of community.

"The shift towards smaller concert venues and more intimate live experiences reflects a growing demand for authenticity, offering brands a unique opportunity to connect with audiences through culturally relevant, locally-driven experiences," shared Gabriela Dominguez, Global Director, Havas Play Spain.



INTERACTIVITY AND PERSONALIZATION MAKE EVERY FAN'S EXPERIENCE UNIQUE

While AI is fueling demand for 'lo-fi' content, **new technologies are also enabling interactivity**, creating personalized experiences that are tailored to individual preferences and habits.

"Interactive storytelling is transforming how we connect with audiences, fostering deeper relationships and setting a new benchmark for engagement," shared Rajika Mitra, Managing Partner, Entertainment, Havas Play India. "Active participation is enabling media experiences that are more memorable and impactful for audiences."

New technologies in broadcasting are enabling sports fans to curate a viewing experience that is tailored to the insights and viewing options they find most engaging.

"Advancements such as multi-screen viewing allow fans to customize their experience, accessing different camera angles, commentary options, and statistical overlays," shared Arun Kumar Rao, Head of Sports, Havas Play India. "Simultaneously, AI-powered algorithms can curate personalized highlights tailored to an individual's viewing preferences."

COLLABORATIONS PUSH BOUNDARIES AND REACH NEW AUDIENCES

Collaborations not only have the power to tap into multiple fan communities, achieving crossover success, but can also **bridge the gap between online communications and offline experiences** for truly memorable activations.

“Over the past year, we’ve seen some jaw-dropping collaborations: Ja’Marr Chase x 7-Eleven, IKEA x Virgil Abloh, Gucci x McDonald’s, and Lush x Ben & Jerry’s,” shared Elias Reinheimer, Chief Creative Officer, Havas Play Netherlands. “Luxury fashion houses partnering with fast food giants would have been unthinkable a few years ago, but seeking surprising collaboration outside of the industry that challenge perceptions and delight consumers don’t just get people talking—they create experiences.”

When evaluating a partnership, logical collaborations – crossover activations between sports, food, music, and art – are a natural way to bridge online and offline experiences, but more unexpected pairings

have the ability to excite and delight consumers.

“Go beyond tactical agreements and bet on the sum of brands to create unique, memorable, and relevant experiences that would not be possible without the union of both companies,” shared David Pueyo, Head of Havas Play Spain.

With the growing prominence of collaborations, media partners that approach media experiences holistically – eliminating silos between media, culture, and commerce – are equipped to identify and extract the most value from these partnerships.

“With the power of our Converged strategy, which seamlessly fuses talent, capabilities, platforms and expertise, Havas Play is ideally positioned to connect culture to media experiences and create the most impactful collaborations,” shared Ana Roma Torres, Managing and Creative Partner, Havas Play Portugal.

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*Interested in learning how
Havas Play can help your brand
play in culture in 2025 and beyond?*

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