

October 2025

PLAYFLY SPORTS FANSCORE:

The Acceleration of
Owned IP Events

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EXECUTIVE SUMMARY

In a sports ecosystem crowded with owned IP, events that differentiate themselves will create opportunities and enable operators to turn storytelling and fan passion into scalable revenue. They allow rightsholders to better monetize assets already under control, deepen relationships with existing partners, and create premium sponsorship inventory for brands aspiring to distinguish themselves. The next three years will be defined by organizations that not only participate in owned IP events but own the narrative around them, and Playfly is already operating and monetizing in this space. Playfly is well positioned to deliver value to brands and agencies through its purpose-built owned IP events. Playfly has created and currently operates leading nationally recognized female basketball and volleyball events in the Coretta Scott King Classic and the Opening Spike Classic, support more brands through innovative partnerships and activations.



IF YOU BUILD IT, THEY WILL COME, AND KEEP COMING BACK

In the classic 1989 film *Field of Dreams*, Kevin Costner's character Ray Kinsella hears a mysterious voice: "If you build it, he will come." Against all logic, he carves a baseball diamond into his cornfield, risking everything, even foreclosure on his family's farm. In the end, the field brings back legendary players and, more importantly, reunites him with his late father for one last game of catch. The scene is about more than the bond between a father and son; it's about the power of sports and the passion and meaning it can bring to an individual's life.

Over time, Kevin Costner's line has come to mean something bigger: sport has a uniting power and if you create something special around it, people notice. They show up, and if it's truly compelling, they keep coming back.



A GROWING OPPORTUNITY

Among the disruptions the sports industry is facing today (post-House NIL, the AI boom, direct-to-consumer streaming platforms), there is another area of growth that is less talked about: the creation and expansion of differentiated owned media IP events. These are events whose media rights and IP are created by a myriad of sports entities across the industry and monetized beyond traditional broadcast rights. They aren't just games, they are platforms for storytelling, sponsorship, and accelerating long-term equity for brands that invest in them.

Legacy leaders and new entrants alike are aware of the trend. Network Events (FOX, TNT Sports, and ESPN) are aggressively expanding, agencies and foundations (WME Sports, Intersport, HS&E, AEG, the Charlotte Sports Foundation, and the Nashville Sports Council) are investing, and media agencies like Publicis, in partnership with Disney and TNT Sports, are making big bets on women's sports through owned IP (e.g., the Players Era Challenge and Women's Sports Connect).

Playfly saw this growth area and has begun to produce owned IP events, seeing the unique platform they provide for brands to stand out. In 2025, Playfly Sports launched two of its own events centered around women's sports: the Coretta Scott King Classic, a women's college basketball double-header in honor of the Estate of Dr. Martin Luther King Jr. and Coretta Scott King, and the Opening Spike Classic, a two-day "week one" women's college volleyball event. The showcase of elite programs and unique value proposition of each of these events have distinguished them in the crowded landscape and contributed to the positive momentum and increased demand around women's sports content. Both events have created value beyond expectations and garnered unique media attention. According to Deloitte, women's sports are projected to generate \$2.35B in global revenue in 2025, up 25% from 2024's \$1.88B, evidence that the demand for premium, well-produced events is only growing, and leading this growth is investment from brands. To that, both ESPN Events and FOX Sports are "all-in" on the women's game.

The sports landscape is flooded with content: In 2024, there were more than 700,000 TV ads running in sports and over 4.2 billion minutes of brand logo exposure. But these events have differentiated themselves by providing unique outlets for storytelling and offering more visibility to advertisers because fans engage with the content on a deeper level. Creating owned IP events that can stand out from the crowd is a proven way to better engage with and monetize fandom, which, in the sports ecosystem, is more important now than ever.

WHAT'S BEEN DONE SO FAR

Clint Overby, 23-year veteran of ESPN Events, is keenly aware of the rising viewership of women's sports and is actively seeking open programming windows to increase the frequency of women's content, especially with college volleyball. In August 2025, in partnership with the NCAA and FOX Sports, ESPN expanded the AVCA First Serve to include ten of the nation's top collegiate volleyball teams across four days and two venues, up from one venue and four teams in the previous year. Over the four days, both Disney (ESPN) and FOX Sports (FOX, FS1, and Big Ten Network) jointly broadcast matches nationally. Then, a week later, on the same weekend as Playfly's Opening Spike Classic, ESPN Events created the Sprouts Farmers Market Broadway Block Party, a tripleheader of women's volleyball at the Bridgestone Arena in Nashville, across ABC, ESPN2, and SEC Network. Both sold over 11,500 tickets for their Sunday sessions, outdrawing most NCAA regionals.

ESPN Events recently announced Sprouts Farmers Market would also be the Title Sponsor of the *espnW Invitational*, an event featuring top women's basketball teams that will take place on December 14 in Fort Worth, Texas, between Baylor and Texas—a clear indication that Sprouts views events like these as an opportunity to target passionate audiences and “level the playing field” against competitive brands with bigger national budgets.

ESPN Events launched in 2001 with the acquisition of the Las Vegas Bowl and is the legacy player in the owned IP space. ESPN Events is a “business within a business” at ESPN, totaling twenty-five people, five of them in sales and many outsourced in operations. They sell the best of ESPN's events inventory, work outside the ESPN sales group, and frequently partner with third-party sales organizations. Overby defined the essence of his group as “internal content creators, reshaping the monetization model of rights and executing a playbook where $1 + 1 = 3$.” Overby shared, “The biggest challenge for the ESPN Events is team commitments. With the center of the wheel being team scheduling, the pipeline must be primed for the best opportunities. We look to align the right school brands with the appropriate events for the greatest impact.” The 2026 Opening Spike Classic will be televised on ESPN and promotion, broadcast, and commercial inventory will come from them. ESPN Events can sell the IP (ownership platform) surrounding these events differently than traditional ad sales upfront and scatter cycles, which unlocks incremental value to brands.

On the FOX Sports side, another partner of Playfly (who broadcasts the Coretta Scott King Classic on FOX), Jordan Bazant, Executive Vice President of FOX Sports, expands on how the monetization model differs from conference-affiliated programming and ROS (Run Of Schedule) commercial obligations. “Creating neutral-site events, like the Coretta Scott King Classic with Playfly, has benefits on many fronts. First and foremost, it ensures FOX Sports consistently fills its schedule with nationally relevant matchups that capture fan interest and deliver strong viewership. These must-see events both elevate our programming and strengthen FOX Sports' position as a destination for college sports.”

Two things can be true at the same time. In college sports, the changing landscape is impacting

how athletic directors refine the business framework of their administrations and the need to innovate and drive incremental revenue to better monetize their programs. As the collegiate industry evolves, industry stakeholders are turning to owned sports media properties. FOX Sports is fully committed, especially to growing the women's sports audiences. Bazant added, "The rapidly evolving landscape of college athletics is reshaping how stakeholders operate. With conference realignment, expanded playoff formats, and shifting media rights deals, it's more important than ever to identify new and sustainable revenue streams. These events provide a flexible model that generates value beyond traditional broadcast rights. Together with partners like Playfly, we're able to leverage complementary assets to the benefit of all our fans, schools, and stakeholders."

A partner to FOX Sports on the College Basketball Crown, AEG entered the sports media IP ring in 2025 to deliver new inventory to existing brand partners, add value in the marketplace, and program venues during dormant periods. Nick Baker, President & COO, AEG Global Partnerships, cites the "exchange of value and mutual interests to align on this joint venture creates a sustainable business model that is additive to the existing AEG portfolio." As FOX Sports was seeking an opportunity to go deeper on their commitment to college sports, they saw an opening to modernize the postseason model and sought a partner that could bring the expertise of sponsorship sales, venues, and event operation. A year in, the Crown is profitable, with multi-year sponsor commitments and a revamped TV schedule for 2026 to reflect a smaller field of eight teams, exclusively with marquee college brands. AEG monetized the Crown because the dynamic offering was relevant to new and existing partners.

THE PLAYBOOK GOING FORWARD

ESPN, FOX Sports, and AEG have all increased their commitments to the creation of owned media IP, becoming more relevant to brands. Similarly, Playfly is utilizing owned media IP events to offer unmatched reach for brands looking to make lasting connections with loyal audiences. The Coretta Scott King Classic and the Opening Spike Classic are two successful examples of this expansion, which Playfly will continue through its consulting arm dedicated to maximizing value for brands around owned IP, inclusive of building customized events for its own clients.

As brands leverage Playfly content, properties, and media assets, there has never been a better time to curate owned media IP events to shepherd brands through the nuances of owned events. Just recently, a brand and a sports marketing agency engaged Playfly inquiring about ownership of media properties in 2026. A committed roster of owned media properties positions Playfly as a deeper player across sports and will elevate our status during the all-important media upfronts. Additionally, it solidifies our standing as an innovative sports media, marketing, and tech agency to our legacy brand partners, allowing us to build equity-driving growth platforms for brands.

Just as Ray Kinsella's field became more than a ballpark in Field of Dreams, owned IP events can be more than games. They are platforms for expanding brands' reach and visibility in new markets, standing out through innovative integrations, and creating evergreen access to loyal fans. In the words of Ray Kinsella, if we build it, fans will not only attend these owned IP events but will keep coming, allowing us to deliver long-lasting incremental value for our brand partners.



Playfly Sports, the sports industry's leading revenue maximization company, drives growth for its partners across the sports ecosystem – including 2,000+ brands, 100+ professional teams, 65+ college athletic departments, all U.S. local sports networks and associated streaming platforms, and other marquee properties. Its fan engagement platform allows its partners to reach and engage over 85% of all U.S sports fans. Playfly builds and implements custom strategies across media, sponsorship, premium experiences, ticketing and fan engagement offerings through proprietary data, innovative technology and compelling storytelling. Playfly operates an expansive portfolio of services with a data-driven and fan-focused approach to maximize revenue yield in key growth areas, such as media, sponsorship, ticketing, premium experiences and fan engagement offerings. Founded in September of 2020, Playfly Sports is now home to approximately 1,000 team members located across 43 U.S. states and internationally dedicated to maximizing the impact of highly passionate local sports fans. The company has been named a *Best Place to Work in Sports* by Sports Business Journal, Front Office Sports, and Newsweek. To learn more, follow Playfly Sports on social media platforms or visit www.Playfly.com.