



FANSHIFT



2035

A large crowd of people, likely fans, sitting in bleachers. The image is overlaid with a semi-transparent white box containing text. The text is in a bold, sans-serif font. The background is a warm, orange-toned photograph of a large group of people, mostly young adults, sitting in bleachers. Some are wearing hats and jackets, suggesting a sports event. The text is centered within the white box.

FUTURE FANS AREN'T GUARANTEED.

**THEY MUST BE UNDERSTOOD
AND INSPIRED.**



THE BACKSTORY

In November of 2024, I took part in a leaders' retreat in eastern North Carolina. I had the opportunity to introduce our closing keynote speaker, a demographer who reminded us of the term "Silver Tsunami." During his 45-minute interactive presentation, he explained the impacts of the population wave that will strike: the United States will have more 65-year-olds than 18-year-olds by the year 2035.

When he stepped down from the podium, I caught myself muttering in disbelief. In that instant, it became clear to me that college athletics fan attendance was in serious trouble.

Throughout the next 10 years, the stressors on our aging fans will include, and will certainly not be limited to, health concerns, rising ticket and concession prices, a desire to travel with family and friends, and an ever-changing roster of players that will affect both performance and the integrity of the brand. Currently, our 18-year-olds, who are now fewer in number, are not being conditioned to attend games. The social factors that press upon them from a variety of sources contribute to a lack of habit of passing through our gates. In a decade, when they have expendable income as they build their lives, the expectation they will be ticket buyers for our stadiums and arenas will be farfetched.

The financial condition of our athletic departments is already in jeopardy, and the impending changes in our national age demographics make revenue generation tenuous. The need to cultivate and maintain fans is more important than at any time in our collective college athletics history.

What we are at risk of losing, beyond the revenue, is a sense of community pride through civic engagement. Our venues are gathering places where spirit is maintained and relief from the frenetic can be found, even if for a few hours. If there are fewer people attending, the college athletics industry and our campuses will suffer mightily.

In January of 2025, I embarked on a "listening tour" with the goal of launching a thought leadership mechanism to discuss the demographic challenges and to develop solutions. The result of my efforts is *FanShift 2035*.

Trip Durham



QUOTES AND COMMENTS

from
Online Publications

Forbes

“Today, they are a demographic group 73 million people strong, with the oldest boomers just turning 75. Since 2010, about 10,000 of them have turned 65 per day, and they all will cross that age threshold by 2030. Once again, this – now aging – population will have a significant impact on everyday life, the economy and society.”

“The key is collaboration through interdisciplinary partnerships that bring together experts in medicine, public health, business, the social sciences, law, and the humanities.”

Business Insider

“The over-65 population is on track to grow 30% over the next 16 years, encompassing 80 million Americans by 2040, according to the US Census Bureau.”

U.S. Census Bureau

“The number of people 85 years and older is expected to nearly double by 2035 (from 6.5 million to 11.8 million) and nearly triple by 2060 (to 19 million people).”

Government Executive

“Last week (June 2024), Pennsylvania unveiled its master plan to care for older adults. The Keystone State is the fifth oldest state in the nation, and the number of residents 60 and over is projected to surpass 3.8 million, or one-third of the population by 2030. The commonwealth’s plan, called Aging Our Way, PA, is a roadmap for improving “the way older adults are cared for, how they receive and connect to services and supports, and how they can get the most out of their communities to age in place,” said Department of Aging Secretary Jason Kavulich.

Congressional Budget Office

“The size of the U.S. population and its composition by age and sex have significant implications for the economy and the federal budget. For example, the number of people ages 25 to 54 affects the number of people who are employed, and the number of people age 65 or older affects the number of Social Security and Medicare beneficiaries.”

HousingWire

“Laura Streed, a senior associate state director for the group’s Florida chapter, told attendees about the population demographics. By 2034, she said, people in the 65-and-older group will outnumber those in the 18-and-older group for the first time.”

Florida and South Carolina are not the only states that expect to reorient services to meet the needs of an increasingly older population. Higher costs of living are pushing more older homeowners toward aging in place or other novel solutions like taking on roommates.”

Zillow

“Places likely to be most impacted by this upcoming Silver Tsunami include both retirement hubs (Miami, Orlando, Tampa and Tucson) and regions where young residents have left (Cleveland, Dayton, Knoxville and Pittsburgh). The impact of the Silver Tsunami is also likely to vary greatly across different areas within metros.

The places likely to be least impacted include those with vibrant economies featuring fast growth and affordable housing that act as magnets for younger residents (Atlanta, Austin, Dallas and Houston).”

Inforum

“53% of Minnesota business owners are over age 55, according to data from the U.S. Census, and 52,000 out of the 525,000 businesses are expected to change hands or dissolve in the next five (2030) to ten years (2035).”

Senior Living Consultants

“The demand for senior living facilities will be greater than ever as baby boomers can no longer live in their own homes. More independent senior housing communities, continuing care retirement communities, assisted living homes, memory care facilities, and private residential care homes will need to be built to meet the need for senior housing.”





THE FORCES BEHIND FEWER FANS



THE SHIFT IN COLLEGE SPORTS

THERE ARE FEWER PEOPLE ATTENDING COLLEGE SPORTING EVENTS.

NOW

2035

Birth rates declining,
Population getting older

Fewer young people
attending sporting events

Weaker emotional
connections between fans
and athletes

Financial priorities are
being reevaluated

Digital viewership is on
the rise

59/135 FBS schools
experienced reduced
attendance over 5 seasons

Inflation fatigue with
loyalty programs

Fewer high school graduates

Cost of living that will
influence budget for
entertainment

Distaste for years of rising
ticket prices and fees

Physical limitations, less
desire to endure long events

10 years of evolving
streaming opportunities

2D CONSULTING'S UNIVERSITY COHORT INITIATIVE

This initiative is designed to confront this challenge head-on, bringing together institutional leaders, industry experts, and innovators to develop forward-thinking solutions. Through a structured series of collaborative sessions, we will analyze demographic trends, reimagine the fan experience, and explore new marketing and technology-driven strategies to sustain and grow stadium attendance in the years ahead.

**TO GET STARTED,
LET'S HAVE A CONVERSATION**

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FANSHIFT

2035



ATHLETIC ADMINISTRATION
THOUGHT LEADERSHIP
THE BLUEPRINT OF A NEW PROGRAM

The Membership of the NACDA Affiliates

A seven-month continuing education series, certificate program for emerging leaders in game-day strategy, fan engagement, revenue growth, stewardship, and communications.

- This is a laser-focused engagement, with far-reaching benefits.
- This is not generic leadership training.

FanShift 2035: Navigating the Demographic Shift in College Athletics

Think of the initiative as an investment that pays twice. 2D's continuing education program doesn't just check a training box—it equips the associations' members with skills that directly elevate performance and leadership potential. Affiliate members can earn a recognized certificate, giving them a tangible achievement to add to their professional profile. For the associations and the schools that are members, that means better retention: supervisors are more inclined to keep people who've proven they're growing. For the affiliate members, it's motivation to stay in the profession because they see a path forward. In short, the associations (and their schools) keep talent, athletic administrators see a future, and everyone wins. We all value relationships, and *FanShift 2035's* cohort will build a lasting peer network.

Format

2D Delivery: Monthly 90-minute live video platform (recorded for on-demand, password protected)

2D Audience: Athletic Administrators at all stages of their careers

2D Structure per Module:

1. 15 min: Framing lecture from a subject-matter expert
2. 30 min: Case study / real-world example
3. 30 min: Small group discussion rooms
4. 15 min: Share-outs, Q&A, and assignments

2D Between Modules: Reading/video assignments + brief reflection or mini-project

2D Completion: Certificate of Professional Development in 'Demographic Preparedness for FanShift 2035'

Module Breakdown

Module 1 (September)

The Demographic Time Clock: Why 2035 Matters

Objective: Build awareness of the shifting U.S. population makeup and why it will redefine the fan experience.

- ②① **Guest Presenter:** Demography Expert
- ②① Overview of 18–24 decline and growth in older adult populations
- ②① Rising multicultural demographics and implications for marketing
- ②① Urban vs. rural population changes affecting regional fan bases

Case Study: NCAA attendance patterns over the last 20 years

Assignment: Identify three ways your school's core fan profile could look different in 10 years. Consider the characteristics of your city and surrounding areas. Think about who your fans are currently, as a family, as a business community. Submit thoughts (no later than) five days before the next meeting.

Module 2 (October)

The Changing 18–24-Year-Old: Redefining the 'Student Section'

Objective: Understand behavioral, social, and cultural shifts of upcoming student cohorts.

- ②① **Guest Presenter:** College Enrollment Strategy
- ②① Tech-first engagement and short-form content habits
- ②① Mental health, social belonging, live events, back to in-person
- ②① Competing entertainment options (esports, streaming)

Case Study: How one university grew student attendance by creating 'micro-communities' inside the stadium

Assignment: Draft a '2035 Student Section' concept plan. Dream on this. A bit of a magic wand exercise grounded in what you see today. Submit plan (no later than) five days before the next meeting

Module 3 (November)

Sociology and Why It Matters: Who Are We Now and Who Are We Becoming?

Objective: Develop an understanding of the structure of our society and how sports factors into our cultural fabric.

- ②① **Guest Presenter:** Sports Sociologist
- ②① How we treat gatherings and the benefits of relationships
- ②① The consequences of smaller fan bases and fewer opportunities to share

Case Study: The closing of Limestone University

Assignment: Choose one moment in sports in which a large fan base contributed to the ethos of a community. Submit one page profile (no later than) five days before the next meeting.

Module 4 (January)

Multicultural America: Meeting Fans Where They Are

Objective: Build cultural competence in marketing and fan engagement.

- ②D **Guest Presenter:** College Athletics External Relations
- ②D Shifting racial and ethnic demographics and what they mean for sport culture
- ②D Language access, family traditions, and culturally resonant promotions
- ②D Avoiding tokenism – building authentic relationships

Case Study: Hispanic Heritage Night done right – and wrong

Assignment: Create one authentic multicultural game-day activation plan. Submit plan (no later than) five days before the next meeting.

Module 5 (February)

The Aging Fan: Accessibility, Comfort, and Loyalty

Objective: Prepare for a growing base of older fans without alienating younger ones.

- ②D **Guest Presenter:** College Athletics Development
- ②D One-on-One conversations, senior living communities
- ②D Flexible ticket models for those on fixed incomes or with limited mobility
- ②D Amenities and services that enhance comfort without sacrificing atmosphere

Case Study: Stadium features that make for a senior-friendly fan experience

Assignment: Map out one fan journey for a 70-year-old season ticket holder. Submit journey (no later than) five days before the next meeting.

Module 6 (March)

Tech, Data, and the Personalization Imperative

Objective: Leverage data and technology to anticipate and meet diverse fans needs.

- ②D **Guest Presenter:** Corporate Industry Expert
- ②D CRM and ticketing analytics for targeting fan segments
- ②D AR/VR, mobile apps, and 'virtual game-day' options for those who can't attend
- ②D Using technology in building loyalty programs and communications that cross generations

Case Study: How data personalization boosted attendance at a mid-major program

Assignment: Use your school's available data to propose one segmented outreach strategy. Submit plan (no later than) five days before the next meeting.

Module 7 (April)

From 2027 to 2035: Building an 8-Year Game-Day Plan

Objective: Synthesize learning into a practical, future-ready attendance strategy.

- ②D **Guest Presenter:** Strategic Plan Expert
- ②D Mapping year-by-year initiatives leading to 2035
- ②D Interviewing stakeholders
- ②D Funding models and ROI measurement

Case Study: 8-year attendance growth roadmap from a Power Four program.

Assignment: Present a 5-slide '2035 Readiness Plan' for your campus. Submit plan (no later than) five days before the next meeting.

Deliverables

- ②D At the end of the program, athletic administrators will have generated at least three fan engagement concepts.
- ②D The assignments associated with each module should not be considered “extra work,” rather strategic planning accelerators for their careers and their current athletic department(s).
- ②D Yearly cohorts would present at convention every June starting in 2027.

Endorsements

A demonstration that this is an opportunity for athletic administrators to contribute not only to their campus but also the industry. Statements would be crafted by presidents, commissioners, and/or sitting ADs across college athletics.

Steering Committees

A small group of leaders from the NACDA affiliate Board of Directors would comprise this advisory body.

Educational Support

FanShift 2035 will collaborate with a Sport Management program from a renowned university. The students engaged will assist with research and planning (they are the budding professionals that will be faced with the challenges ahead).

Investment

This cohort-based continuing education program requires an **investment per participant**, with limited seats available to ensure a high-impact, collaborative experience. Detailed investment information is provided during the enrollment conversation.

This program is designed to invest in the athletic administrators with the intentions of not only returning revenues through solutions generated, but also creating both fan and staff retention mechanisms for universities across the country.

