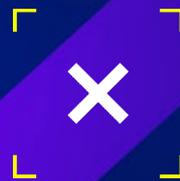




IMG MEDIA PRESENTS

SEVEN LEAGUE



DIGITAL TRENDS 2023

DECEMBER 2022



IMG



INTRODUCTION

At the turn of every year, Seven League releases its report on the seven key trends to watch for the 12 months ahead.

THIS YEAR, WE DO SO AT THE GREATEST MOMENT OF TRANSITION FOR THE TECHNOLOGY SECTOR SEEN IN A GENERATION.

Facebook and Twitter have been perhaps the two platforms most emblematic of the web2 era. At both companies – Twitter and also Facebook’s parent company Meta – we’ve seen thousands of job losses. Both companies have serious, albeit very different, question marks over their future direction.

Meta is facing challenges on several fronts – App Tracking Transparency and confidence in its vision for a metaverse being two. A third is the emergence of TikTok as a powerful competitor.

The fact that TikTok, which is a streaming platform not a social network, is forcing Instagram, a classic of the social media era, to redraw its product roadmap while Twitter goes through its own turmoil behind the scenes, is a significant moment.

The era of social media dominating digital may be over.

A NEW GENERATION OF THE INTERNET – WEB3 – STARTS NOW.

In its short lifespan to this point, the term web3 has come to be synonymous with the metaverse, NFTs, blockchain and crypto, and decentralised platforms.

All of those things will play a part but the dominant themes will be more familiar: the way to win in web3 is to have a strategy for streaming, content, communities, data and commercial.

Apple and Amazon as sports broadcasters was once the stuff of predictions - now reality. Content consumption is changing dramatically – with TikTok, Netflix, Disney and others at the forefront. Video is king and the streaming platforms is where it will happen.

Community management, a priceless skill through both web1 and web2, is now central to any successful NFT launch and platforms like Discord and Twitch. It will be even more vital on decentralised platforms, of which Mastodon is a current example.

Ownership of data remains an asset which every organisation must have a plan for. And here at Seven League we will be working to ensure that rights holders do all of the above as a revenue generator, not a cost centre.

2022 WAS SEVEN LEAGUE’S FIRST FULL CALENDAR YEAR AS THE DIGITAL ARM OF IMG MEDIA.

We’re more excited than ever about our own future – offering sports rights holders a complete offer they just can’t find anywhere else, combining Seven League’s long-standing digital expertise with IMG’s global scale and commercial prowess.

Please enjoy the 2023 trends report. Our team monitors the technology landscape 365 days per year on behalf of our clients and we are always excited to bring you this guide. If you need us to help you on your journey, please get in touch.

LEWIS WILTSHIRE
CEO, SEVEN LEAGUE

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1

THE MEMBERSHIP WARS

WHAT HAPPENED IN 2022?

An NFL game will take place on "Black Friday" for the first time in 2023 and air exclusively on the streaming platform of North America's biggest retailer.

In our 2022 annual trends that might have been a prediction. In this edition it is a fact.

The sport broadcasting landscape has changed seismically in the last 12 months. Streaming is the battlefield.

However, the popular shorthand of "streaming wars" to describe the ongoing tussle for attention and subscription revenues is outdated. "Membership wars" might be more appropriate.

That's because the streamers are not just streamers – they're utilities. No longer do we pay to subscribe to content. We pay to subscribe to a package from a utility provider, and sports rights are a key part of the bundle.

2022 saw a number of mergers, acquisitions and partnerships as even the biggest media companies brace for a landscape where there are a handful of major players offering broader packages to consumers.

This year saw streaming surpass cable TV for share of viewership in the US for the first time. But the ability of consumers to subscribe to

various services is not unlimited – we reported way back in our 19/20 report that we would sooner or later hit subscription fatigue and there's been clear evidence of this in 2022.

This plays into the hands of Amazon, Apple and Disney among others.

Amazon Prime offers NFL, UEFA Champions League and Premier League in various markets, but exclusive video is just one benefit, along with free next-day delivery of shopping, music, gaming and more.

Amazon's rival retailer Walmart has countered this by adding access to Paramount+ (live sports and entertainment) to its membership package.

Apple's 10-year global buyout of Major League Soccer rights gave us a fascinating and exciting new entrant into sports rights.

Disney+ membership has been expanded to include real-world discounts on theme parks and merchandise as well as video streaming.

Consumer expectations have been set in 2022 – they will pay to stream live sports, but the biggest winners will include these rights as part of a mix of digital and real-world membership benefits.

WHAT WILL HAPPEN IN 2023?

The value of live sport to the streaming platforms is clear – sport is a unique driver of audience acquisition and retention, and especially when it's part of a bundle.

Technology companies judge themselves on aggressive user targets which places sports at a premium, since sports can bring a guaranteed audience with them.

But we believe that sports must maintain or improve their own digital standards in order to remain attractive to the streamers.

Viewership for Amazon's 2022 streaming-only debut of Thursday Night Football exceeded advertiser expectations and generated a record-number of Prime sign-ups during the three-hour window.

But this is the NFL – whose games accounted for 48 of the 50 most-watched broadcasts of any kind in the US during the 2021 season. Most sports rights holders need to be able to show the new generation of broadcast partners that they have engaged fan communities which they can bring to the table.

Sports will also need to ensure their own membership propositions are premium – with a frictionless user experience and personalisation, factoring in ticketing, merchandise and community benefits.

The continued advancement of major tech-focused companies such as Amazon, Alphabet and Apple into sport will provide a financial boost – but every sport needs to rise to those standards.

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2

GO BIG ... OR GO DIFFERENT

WHAT HAPPENED IN 2022?

No review of 2022's tech trends can ignore the ongoing rise of TikTok.

Spearheaded by Gen Z users with a disdain for existing narratives and old media, we all know that TikTok has given rise to irreverent content. Maybe less well known is that it's also becoming the number one search option for this demographic – per the [New York Times](#).

Sports organisations have tried to ride this wave by embracing a new-found freedom in their content. From new ways of announcing news (these [Chelsea](#) and [Arizona Coyotes](#) examples are two among thousands) to recruiting comedians for individual skits (see: [Man City](#)) to the Buffalo Bills leaning into [meme culture](#).

What we're seeing is the slow death of repetitive, dull content where a win equals a "good week" and a loss equals a "bad week" for content. There may not be much of an audience for that funny meme when you've lost four in a row, but equally, content planning is increasingly not dependent on results.

Venezia FC has doubled down on fashion and Venice itself, whilst The Masters focuses on high-end photography and the culture at Augusta over standard highlights. Easy, you might say, to divert from the norm when you're a once-a-year event, or a team with minimal expectations, and there's some truth to that.

But, there is a but.

WHAT WILL HAPPEN IN 2023?

Middle of the road may feel safe. It's what your fans like. Or at least, what your core fans like. Or at least, what your core fans did like at one point. That comfortable spot in the middle is now shrinking beneath your feet.

The same device a sports fan uses to interact with their favourite teams or events is peppering them with alternative options for what to focus on in that very moment – news, music, games, video, retail, messaging.

To avoid becoming diverted by the wealth of other content and options, there are two main choices: Go bigger ... or go different.

Being different means giving your creative teams the freedom and permission to trial new ideas and collaborations. Going big means innovation, resource expansion, localising in new global markets and attracting new fans and partners.

Not everyone will have the budget for a *Drive to Survive* or a *Last Dance*. But for those who don't, there may be a different, more left-field path.

Both paths require change, but avoid becoming trapped in the malaise of the shrinking middle. Archive video, press conference quotes, highlight clips and post-game 60-second shoutouts have served us well, up to a point, but in 2023, we may need to find another way.

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3

WEB3 BECOMES USEFUL

WHAT HAPPENED IN 2022?

Web3 in 2022 was a tale of two halves for the sports industry. In early 2022 there were countless examples of crypto-based projects, sponsorship deals and NFTs. Crypto.com became an F1 and FIFA World Cup sponsor, blockchain company Tezos became a Manchester United sponsor. Wimbledon, Man City, Red Bull Racing and Liverpool FC all sold NFTs on various marketplaces whilst fan token projects like Sorare signed deals with hundreds of clubs and leagues including PSG, La Liga and Arsenal. The sports industry was making hay as the sun shone, and why not?

Then the value of cryptocurrencies collapsed. Ethereum dropped from a year-high of nearly \$4k to under \$1K in June. Crypto businesses were making less money and fewer people had spare crypto to buy or invest in NFTs. Despite the huge marketing spends by various crypto businesses, the conversion of sports fans to web3/NFT enthusiasts has been a lot slower than many expected.

The sports industry continued to mint NFTs – some good, some bad but in general it became far harder to make these projects a success. The collapse of FTX in November 2022 caused a double impact, directly hitting a large number of high-profile sponsorships in the sports sector but also financial

losses for individual users, further eroding the trust of a space already riddled with security concerns.

Although 2022 ends with an air of FUD (Fear, Uncertainty and Doubt – an acronym well-used in web3 circles) we are also seeing green shoots.

Meta has added NFT capabilities to Instagram and Facebook, Apple is relaxing its grip on NFT trades in the App Store (although sticking to a 30% cut on sales) and perhaps most fascinatingly, a loyalty programme from Starbucks has a Polygon NFT portion baked in.

WHAT WILL HAPPEN IN 2023?

The early uses of blockchain technology for sport have revolved around collectibles – sports fans like collecting and displaying digital assets (cards, highlights clips, skins) – but the principles of a decentralised public ledger remain a potent opportunity for any individual, business or organisation trying to reach an audience at scale. How can this ledger show off early adopters, the most engaged fans and how can this technology be used to create new experiences with fan bases already connected?

For sport, it's likely in 2023 that the innovation won't be focused on using these new technologies to solely make money but instead to improve the relationship with fans and customers. The true artform is in building and fostering fan communities who connect around these themes.

We've been working with Oracle Red Bull Racing to launch a Discord server to help grow communities around its F1 and esports teams as well as its NFT projects, for example.

Looking forward we think there will be evolutions in ticketing (proof of attendance backed with digital assets), fan engagement (community building), resaleable digital

WHEN A MARKET DECLINES THERE IS NO POINT REPEATING WHAT OTHERS HAVE DONE BEFORE: THE ONLY WAY FORWARD IS INNOVATION.

merchandise and loyalty programmes where fans' activities are permanently recorded via a digital membership card.

It's also likely we'll stop using phrases like NFTs and move towards more fan-friendly language. As it becomes more common, there will be less inclination for anyone to focus on the complexities of the technology, and instead think about its use.

When a market declines there is no point repeating what others have done before: the only way forward is innovation. A bear market is a time to build. The sports industry would be wise to start thinking longer term, and building for the future.



4

AI AND THE FUTURE OF CONTENT

WHAT HAPPENED IN 2022?

2022 saw the emergence of exciting new forms of computer-generated content. The umbrella term for these developments including DALL.E, Stable Diffusion, GPT-3, OpenAI, Hugging Face and others is known as generative AI.

There were early prototypes showing how AI engines may be able to create art and music, generate artificial influencers and celebrities and literally generate video from text. The technology has the potential to upend our notions of creativity, art, copyright and reality itself.

For several years we've grown comfortable with the idea that AI, or more specifically machine learning and natural language processing, can enable human-computer interaction, largely around text and speech. Think Alexa and Siri.

This year a Google engineer left the company after claiming that its LaMDA conversation engine had become "sentient". In truth, LaMDA's capability had advanced beyond that of a basic chatbot with narrow, predefined paths into a more conversational application, allowing it to engage in a free-flowing way around a number of topics.

We then saw experiments with AI systems that can create realistic images and art from a description in natural language, the two most prominent being DALL.E 2 and

Stable Diffusion. These interfaces, trained on thousands of images and videos, can render new content based on what they've learned. The results can be clunky, but the direction they point to is a paradigm change in content creation, much like the invention of photography in the 19th century.

This year saw a proliferation of deepfake-style content. The folks at play.ht made an entirely computer-generated podcast episode between Joe Rogan and Steve Jobs, while Ukrainian start-up Respeecher, which uses archival recordings and a proprietary AI algorithm, gave new voice to Darth Vader using archival voice footage of the now 91-year old James Earl Jones. Another notable example was Top Gun: Maverick, in which the voice of Val Kilmer (reprising his role as Iceman) was synthesised because of the actor's medical condition.

At the consumer level anyone can now mesh an image of themselves with famous pieces of cinema using free apps like Face Magic.

Meanwhile, Google CEO Sundar Pichai showcased a perpetual view generation tool called Infinite Nature which creates drone-style flyovers of landscapes from 2D images. The technology on which it's based, NeRF (Neural Radiance Fields), literally turns 2D photos into complex, volumetric 3D scenes.

WHAT WILL HAPPEN IN 2023?

In 2023 we will see the sports industry start to experiment with an exciting new toolkit for the evolution of its product. These tools will give the industry ways of serving audiences that have been habituated by gaming to expect immersion and interactivity in their entertainment.

Sports organisations will experiment by creating immersive 3D content from still images, offering engaging new content for fans on social media.

We will see hyper-realistic recreations of famous historical moments from the grainiest archive footage.

We'll see people experimenting with alternative commentary formats that marry live data feeds with AI-generated speech from famous voices.

We will see the emergence of a new skill – prompt engineering – where content makers differentiate themselves by knowing exactly which prompt to give the machine in order to get the best result.

2023 will see the first experiments of sports being presented in different environments or realities. With advances in motion capture technology and the adoption of gaming engines outside of gaming, it will be possible to transport sporting moments from the arena of play into new settings from the Sahara desert to the surface of the moon.

These experiments will create thorny new issues around copyright and intellectual property. Artificially generated images and video created by computers trained on

IT WILL BE POSSIBLE TO TRANSPORT SPORTING MOMENTS FROM THE ARENA OF PLAY INTO NEW SETTINGS FROM THE SAHARA DESERT TO THE SURFACE OF THE MOON.

proprietary IP will be something legal minds will need to grapple with. The issue of athlete image rights and fake content will need to be very carefully monitored and policed.

Purists will feel aggrieved, believing that human creativity is being robbed by machines. In truth what will happen is that creative humans will work out new things to do with the technology, as people did with photography and electronic music. We won't lose the old, but we'll have a whole new set of possibilities with the new.



5

D2C ≠ DIY

WHAT HAPPENED IN 2022?

In 2022 it became an accepted norm that every rights holder should have a direct-to-consumer strategy: a plan for how to understand, communicate and transact directly with fans.

Following the trend we saw four to five years ago in retail and latterly in streaming, the idea went that if you have a database of contactable fans, you can then create a vertically integrated offering that allows you to monetise those fans directly, eliminating the margins of third party suppliers and future-proofing your business.

It became an unquestioned logic: "we need to have a direct relationship with our audience".

Partly, this was a defensive consequence of social platforms creating successful data businesses from IP harvested from rights holders. Partly, it was an easily digestible line sold to B2B sports organisations with no direct digital experience of dealing with customers.

From a revenue perspective, the D2C model looks appealing at first glance. Imagine if X million Premier League fans paid \$Y per month – that would equal more than we get today. Imagine if we could get \$Z from each of our fans in ABC region – that would be new value we don't currently capture.

The direct costs are also not eye-watering: a proliferation of digital technologies means

that it's never been easier to stream to, talk to and transact with customers.

But it's not that simple - while digital distribution may be cheap, don't underestimate the real costs associated with D2C. Most of them lie with the C part.

Customers are people, not email addresses or data points, which means they require service. They speak different languages, use different currencies, have different tolerances to advertising, pay different prices, expect different things from the products and services they use, and they're getting increasingly expensive to acquire.

Customers want to speak to other people, they want their money back, they want a service, they want to be part of a community, they want to be heard, they are right ... always.

Building consumer-facing media businesses is hard. It requires specialist expertise and economies of scale.

There's not a sports organisation in the world that is set up to operate a successful direct-to-consumer business at scale, not least because they're also trying to sell media rights and sponsorship, sell tickets, ship retail products and serve people world-class food and drink ... and create a great sports product.

WHAT WILL HAPPEN IN 2023?

There's a good reason why sports has evolved largely as a B2B industry – most sports have multiple revenue lines and don't have the time, budget or wherewithal to become experts in each of these business areas.

B2B businesses exist because in any supply chain there are areas that are best done by a specialist, rather than an organisation developing a vertically integrated, end-to-end solution.

In 2023 the sports industry will realise that D2C is not its panacea, it's an ancillary business line. It will remain extremely important to understand your customer better and to grow a rich data picture to help grow multiple lines within your business. The ROI associated with getting better in this area still stacks up, particularly when it concerns event day revenue.

That said, any notion that a world in which sport circumvents B2B intermediaries as its main line of business is unfeasible.

IN 2023 THE SPORTS INDUSTRY WILL REALISE THAT D2C IS NOT ITS PANACEA, IT'S AN ANCILLARY BUSINESS LINE.

The sport industry will move to a new paradigm where instead of "going direct" and trying to do everything themselves they will look to stay connected to their customers, while trusted third parties help them navigate D2C, and B2B businesses continue to handle the heavy lifting and write the upfront cheques. There will be gains to be made in the D2C space, but D2C does not equal DIY. Sport will need to carefully consider its supply chain and which bits it is in a good position to own, and which it should outsource.



6

SPORT GETS SERIOUS ABOUT COMMUNITIES

WHAT HAPPENED IN 2022?

Twitter's recent turbulence will have caused more than a few sports rights holders to stop and consider how they use that platform. The reality is that social media has never been about community for sports.

Social media can bring fans closer to the brand but it's rarely about developing fan-to-fan relationships. No one builds a friendship with people they see in the comments under Instagram posts, because there's no consistency in who you see there.

Meanwhile, the effects of Apple's App Tracking Transparency policy (ATT) – released in 2021 but with its impact really felt in 2022 – have further undermined the programmatic ad industry.

While programmatic networks have for some years now been plagued with issues of ad fraud and false reporting, the walled-garden Facebook, Google and Snap ad platforms have now seen sharp revenue drops as ATT kneecapped their ability to attribute results to direct response campaigns. Ironically the campaigns themselves are likely as effective as ever, but the lack of attribution has undermined confidence and advertiser spend is way down.

Against this backdrop, brands and advertisers need more credible ways to reach actual

human beings with their digital spend (whether sponsorship or media buy), and that's something that should be a big opportunity for sports properties who can already demonstrate that connection with their audience through basic fandom.

So, with established community platforms like Reddit and Discord now serious considerations for sports orgs, with WhatsApp [rolling out community management tools](#) and Substack [launching chat functions](#), the opportunities for sports rights holders to get serious about investing in fan communities have never been broader.

WHAT WILL HAPPEN IN 2023?

There's long been an assumption from digital practitioners that because the medium is inherently measurable – every impression, click and conversion event can be reported on – it's therefore more efficient and "better" than old media.

Sports have been told repeatedly that the most important metrics are the high-volume figures – impressions, followers, views, reactions – almost to the exclusion of anything else. And particularly to the exclusion of things that can't be measured, or which measure in the hundreds / thousands rather than millions.

Rights holders who've converted billions of short-form video views into a meaningful number of ticket or merchandise sales, sponsorship uplift or even just newsletter registrations are few and far between.

And while those high figures will always play a role in opening conversations with partners, it's time to put faith in activity you can't quantify with a Facebook pixel. It's time to get serious about community.

This means taking on some uncomfortable tasks. For all the ills of not owning your fans on social media, at least you get to outsource the headache of content moderation (not that the platforms always do this as we'd choose).

One entertainment sector which resources community manager skills and roles is gaming – which may be where sports could look for inspiration (or even hiring). It's also an area used to dealing with tribalism at scale.

The sports clubs and leagues who succeed will be the ones prepared to step into that zone and deal with the tricky questions that will inevitably arise from giving fans access to official moderators and staff. Fans aren't wholly unrealistic in their expectations – feeling they're being listened to and responded to will go a long way to building credit for when on-pitch results turn sour.

We've built and run communities for multiple high-profile sports clients; it's not a short-term investment but it's unmatched for the outsized effect it has in creating advocates who will tell your story for you, not to mention the unmeasurable lurkers who take part just by reading.

When this trend is aligned with the growth of digital collectibles and other digital status assets (Reddit has done a careful job of specifically [not calling its NFTS](#)) we believe 2023 to be a year where communities are embraced once more. Expect more sports organisations to know what "running a Discord" actually means by the end of 2023.

THE SPORTS CLUBS AND LEAGUES WHO SUCCEED WILL BE THE ONES PREPARED TO STEP INTO THAT ZONE AND DEAL WITH THE TRICKY QUESTIONS.



DIGITAL DRIVES WOMEN'S SPORT

7

WHAT HAPPENED IN 2022?

In 2022 we saw the 50th anniversary of [Title IX](#), a piece of legislation implemented in the US to ban sex discrimination in any education programme or activity that receives federal funds, allowing more women into universities and to participate in sport.

You may be saying at this point, a lot can change in 50 years so why are we dwelling on this? A lot can and should change in 50 years but when it comes to women in sport, we still only see traditional media providing 5% of coverage vs 95% to men's sport. This has a direct correlation on both growth and commercial opportunities.

The three factors that will continue to help propel equality and support the revenue associated with women's sport are broadcast rights, attendance and sponsorship. The coverage in 2022 is not keeping pace with fandom along with sponsors looking for more, which normally means the new digital shiny object.

This is not to say that nothing has happened in the past year. We have seen a shift from rights holders like [FIFA](#) which unbundled its rights in line with the upcoming 2023 Women's World Cup, following [UEFA](#) which set the pace back in 2017 with its rights. UEFA's shift quickly allowed Visa to follow suit penning a seven-year deal with the women's game.

We also saw broadcast partners like [Sky Sports](#) recognising the need for greater women's football coverage but also utilising digital platforms where audiences would be more inclined to engage, specifically on TikTok and Snapchat.

However, when we look at non-traditional media and specifically the digital angle, we start to see a glimmer of hope for the next 50 years.

We have seen the launch of [TOGETHXR](#), founded and backed by elite athletes Sue Bird, Chloe Kim, Simone Manuel and Alex Morgan, and most recently announced, [Fast Studios](#) launching the Women's Sports Network, the first 24-hour streaming service for women bringing the LPGA, US Ski & Snowboard and World Surf League coverage for free.

We also saw continued growth of female athletes on their own social platforms, tying back to our trend in 2021 where we predicted the rise of athletes as their own media platforms. Female athletes still struggle to gain the same reach as males but are often backed by engagement fuelled by trust, as we predicted in our trends looking forwards to 2022, where we talked about athletes' use of social media pivoting to purpose.

Finally, Name Image and Likeness (NIL) has given power to those female college athletes who may still have not felt the impact of Title IX. We see basketball ranked third-highest among NIL-compensated sports with 12.6% of NIL compensation going to those athletes. The sport was only behind men's basketball (18.9%) and football (49.6%) according to [CNBC](#).

Outside of pure athletic talent most deals are directly linked to the authenticity of the athlete, their personal brand and their social channels, which when combined are very effective in reaching audiences and potentially showing commercial return.

WHAT WILL HAPPEN IN 2023?

Safe to say things can only go up from where they are now but digital will continue to drive the model for women's sports through the likes of OTT platforms, social channels, NIL rights, the growth of women's sport media platforms and sponsorship from brands seeking a direct connection to specific communities.

With the FIFA Women's World Cup approaching in 2023, the conversation around women's sport will come to the forefront once again with many brands and stakeholders asking what more can be done?

Following these major moments (or right before), we'll continue to see several large-scale partnership announcements, but they will not be in the traditional sense that we see in the men's game. Unfortunately, we still won't reach the revenue threshold that appears for their male counterparts – that is still some way off.

We'll see the trend of more investment in women's specific digital platforms. This follows the growth we have seen from the likes of [TOGETHXR](#), [Just Women's Sport](#) and [The GIST](#).

Sponsors will keep looking at an approach that allows them to connect with their audiences in a meaningful and new way. New almost always lends itself to digital, bringing together what we have discussed in other trends – new content, innovation like AI, bespoke communities and more.

With the continued growth in OTT media rights across all sports and the rise of non-live content, women's sport can sit perfectly at that intersection backed by the increase in physical attendance and new long-term sponsors. There is great value to be found in connecting with consumers through a new perspective on sport.

THE CONVERSATION AROUND WOMEN'S SPORT WILL COME TO THE FOREFRONT ONCE AGAIN WITH MANY BRANDS AND STAKEHOLDERS ASKING WHAT MORE CAN BE DONE?



ABOUT US

Seven League is the digital partner to the sports industry – powering strategy, operations and commercial. We help our clients reach new audiences, grow deeper relationships with fans and build sustainable commercial models.

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