

INSIGHTS WITH **IMG**

Digital Trends 2024

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Introduction

In many years of producing this annual trends report, there's never been a moment where one of our predictions came true as emphatically or quickly as this time last year.

In our digital trends forecast previewing 2023, written in autumn 2022 before ChatGPT was launched to the world, the fourth trend was entitled *AI and the Future of Content*. Within weeks, ChatGPT took the world by storm, and the growth of artificial intelligence (AI) has not slowed down since. If we're totally honest, even we didn't think it would get that big, that fast.

And so to our trends for 2024. As is now tradition, our entire team has pooled their knowledge, which comes from studying the tech, media and sports sectors throughout each year on behalf of our clients, and collectively decided on the seven biggest themes for the 12 months ahead.

Why seven? Well, as all of our clients know, for every year before this one, this report was the Seven League Digital Trends Report. Seven always seemed an appropriate number to include, and we've kept it at that number as a nod to our roots.

This is the first year that the report is the *IMG Digital Trends*, after we strategically integrated under the new IMG brand that was launched in September, more than two years after our 2021 acquisition by IMG.

2024 will be a pivotal year on the global stage, with major elections in potentially 40 countries including the US, India, and possibly the UK (Source: [Bloomberg](#)), and with these events traditionally having a significant impact on tech platforms. A pivotal year also in the tech sector, as Facebook's 20th birthday provides a bookend for the web2 era, and we move forwards at startling speed in AI (especially), mixed reality, algorithms for everything, the blockchain, and more.

Unarguably, we now live in the web3 era. More arguable is your definition of that term. In our web3 shakedown chapter, we tackle exactly that challenge and state clearly how we feel about the label.

We also have a chapter for AI – did you expect anything else? Our only debate internally was whether to have two chapters devoted to it. We ended up somewhere in the middle – the web3 shakedown chapter touches on AI, and there is a full AI chapter synthesised into *AI: Cut, create, cultivate*.

Following our trend last year regarding women's sport, we see another iteration of this for 2024. The focus is on how the deep fan engagement women's sport enjoys will be a springboard to greater commercial success in 2024. That's discussed in *Here comes the money: Women's sport monetises through digital*.

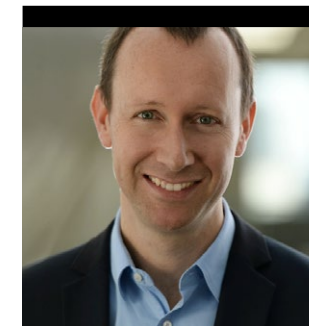
We also reflect on how your stadium will get smarter in 2024. Stadia are no longer just physical buildings. They're interactive broadcast experiences for your fans that delve far into the entertainment realm and with that create a whole new experience.

Personalisation in 2024 will also be a focus – no longer a frill, but something that sport needs to understand that large swathes of its audience simply expect, because for all of their lives, every other form of media they've consumed is uniquely tailored to them. Our other chapter talks about the phrase 'social media' and how, despite those platforms retaining their importance, the name is unhelpful and misleading – maybe it always was.

Finally, we reflect on *The rise of the mega influencer*, because who could've missed in 2023 the impact of Cristiano Ronaldo on the Roshn Saudi League – also known internationally as the Saudi Pro League (SPL) – Lionel Messi on the MLS and Taylor Swift on the NFL.

Our definition of influencer, and the expectation for what it means to move the needle for a sport, will never be the same.

That's a lot for the first ever *IMG Digital Trends Report* to cover. We know that its previous incarnation – the *Seven League Digital Trends Report* – was eagerly awaited by our clients and industry friends every year and we hope this year's report proves equally thought-provoking. While we're at it, we wish you, your businesses, and most importantly your families, a happy and successful 2024.



Lewis Wiltshire

SVP & MANAGING
DIRECTOR,
DIGITAL, IMG

Trend 01

Web3 shakes down, machine learning powers up

The anchor technologies and use cases associated with web3 and the metaverse are starting to emerge.



It's been a year or so since we were all talking about emerging technologies under umbrella terms like Web3 and Metaverse.

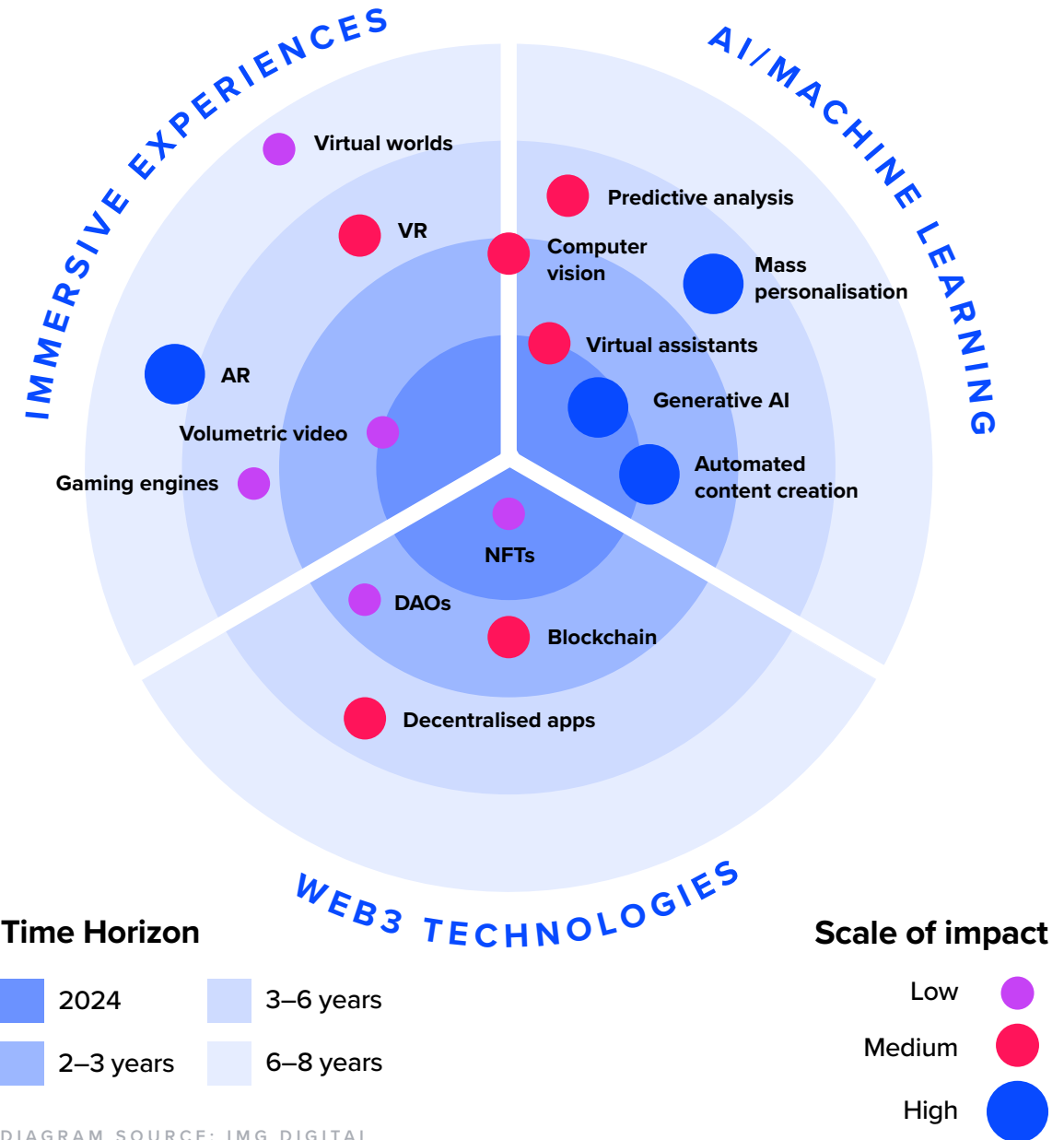
In truth, those terms were always contested, and the emergence of more practical applications powered by machine learning and large language models has created an ecosystem the sports industry's place in remains uncertain. Our clients are asking us which technologies might truly disrupt their businesses and which might present genuine commercial opportunities.

We remain confident in the directional truth that we are at the start of a third age of the internet and – as was the case in the first and second eras – some technologies will begin to emerge as category-defining, while others will fall away. 2024 will be the year this shakedown really happens.

Broadly, we think about the third age of the internet in three buckets:

- 1 web3 technologies underpinned by the blockchain**
- 2 immersive experiences encompassing everything from VR to virtual worlds**
- 3 AI/machine learning**

In each of these overarching categories there are technology sub-sets, each of which has a different time horizon and will impact the sports industry in a different manner. In 2024, applications of machine learning will dominate. Immersive experiences will still be nascent and the crypto winter we're currently in will persist.



As speculators have left the NFT space and high-profile scams have shaken the industry's confidence in crypto – the web3 space will be quiet in 2024 but the blockchain still holds promise. In time it will power some innovative new ticketing and membership approaches, but sports organisations aren't going to be seeing any big crypto sponsorship deals.

In the longer term, immersive experiences will truly transform how we consume and

participate in sports, but this impact will not be felt fully in 2024. Spatial computing and mixed reality developments offer 360-degree broadcast opportunities, allowing supporters to feel part of the action, regardless of their physical location. Through stereoscopic camera lens integration and spatial audio maximisation, the distance between physical and digital experiences will be minimised. Sports will need to stay across advances in

motion capture and 3D modelling that could see sports events rendered in new environments: rights holders that lead the market in 2030 will be the ones testing and learning in 2024.

Machine learning will be the area that has the most immediate and profound impact on rights holders' businesses in 2024 across content creation, customer service and predictive analytics that will enhance sales and marketing initiatives.

As we discuss in our *AI: Cut, create, cultivate* trend – immersive technologies will be significantly improved by AI/ machine learning and the rapid acceleration of computer power which has always been needed to create truly immersive worlds.

Machine learning will be the area that has the most immediate and profound impact on rights holders' businesses in 2024.

IMAGE SOURCE: GETTY



Trend 02

AI: Cut, create, cultivate

2024 will be the year the sports industry starts applying AI in a meaningful way to transform its business.



Last year we anticipated the emergence of generative AI, but even we have been surprised by the pace of its adoption.

ChatGPT reached 1 million users in five days and 100 million users just two months after launch, making it the most rapidly adopted consumer application in history. Where in the previous year crypto and NFTs were struggling to find on-ramps, consumers immediately got how AI interfaces like OpenAI's ChatGPT, Google's Bard and Anthropic's Claude could be useful to them.

What they offer is an easy and free (for now) way to access Large Language Model (LLM) technology – statistical models, trained on large datasets and backed by incredible computing power that allow users to generate 'original' responses from text prompts.

Adoption to date has largely been centred around content creation – more specifically copy-writing and image generation. The latter trend saw enormous growth in the

last 12 months, with text-to-image and text-to-video generators such as Midjourney and Runway out in front.

These services are already part of the content creator's toolkit across sports and entertainment, not just because of the creative possibilities they offer but also because of the efficiencies they create in the content workflow. For example, in the entertainment industry, Runway powers the edits of the *Late Show with Stephen Colbert*, reportedly cutting edit times from five hours to five minutes.

The technology has brought with it copyright issues and the use of digital likenesses. One recent incident of a misjudged faked interview with NBA star, Damian Lillard, is sure to be the tip of the iceberg, with deepfake content presenting multiple challenges in 2024. Hollywood's writers

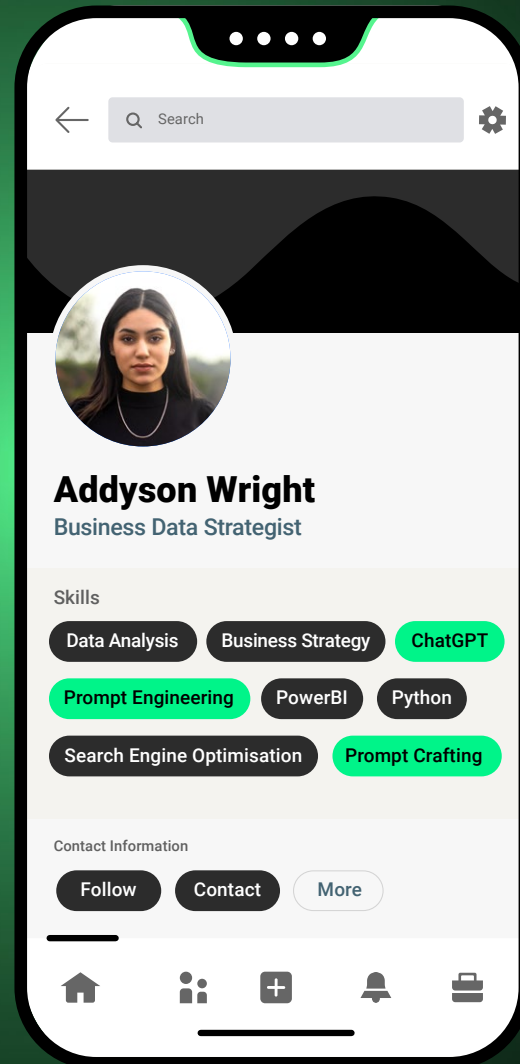


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'DEEPPAKE' DAMIAN LILLARD INTERVIEW. IMAGE SOURCE: THE US SUN

75% increase

in members worldwide adding terms like 'GAI', 'ChatGPT', 'Prompt Engineering' and 'Prompt Crafting' on their LinkedIn professional profiles.



and actors were engaged in industrial action for much of 2023, with AI utilisation a key point in the dispute.

As we predicted last year, ChatGPT's launch has turned prompt engineering into a highly sought-after skill. Since the start of the year, LinkedIn reported a 75% increase each month in members worldwide adding terms like 'GAI' (General Artificial Intelligence), 'ChatGPT', 'Prompt Engineering' and 'Prompt Crafting' to their professional profiles.

In 2024 sports organisations will have a clearer idea of how to use AI and will do so to cut (unlock efficiencies in their processes), create (develop new and innovative content formats and marketing campaigns) and cultivate (identify new commercial opportunities in large data sets).

We expect LLMs to get better and for more competition between AI interfaces to emerge. Services will differentiate themselves based on their proprietary datasets, conversational style and, of course, price.

At the time of writing, Elon Musk announced the launch of a conversational AI tool called Grok, pitching itself against ChatGPT and promising an irreverent tone as well as access to live data from X. It remains to be seen whether it will be successful, but ChatGPT's market-leading position will be challenged.

Nevertheless, its enterprise version will allow organisations the ability to unleash AI on their own data. We expect sports organisations to use LLMs to identify opportunities from the data they currently sit on as well as seeing possibilities in analysing datasets they currently don't capture.

Structural upheaval at OpenAI at the end of 2023 will be overshadowed by new product releases in 2024 including custom GPTs which will allow any organisation to build their own version of ChatGPT using their own data and a much-anticipated GPT Store (effectively an app store for AI).

Early use cases will see sports using AI to improve ticket and retail conversion

through better user targeting. Rights holders will seek to reduce churn on streaming and membership services and optimise pricing through much deeper predictive analytics.

They will also train AI models on content performance data to maximise investment in content production, ensuring they create more of what users value and less of what they don't.

Where organisations have been capturing user behaviour data, such as in-store or

in-stadium movement, AI will provide a valuable layer in improving the live experience for fans by identifying bottlenecks and reducing wait times. Teams and venues will leverage AI chatbots to do much of the heavy lifting of their customer service teams.

We will see content and marketing teams using AI to streamline their approach to research and ideation, content and campaign planning and content distribution. It will be increasingly easy to remove filler words in video, generate

visuals to complement audio, dub videos into different languages and clip long-form videos into shorter pieces.

We will continue to face challenges around deepfakes and misinformation. Athletes and their representatives must be increasingly watchful of which artificial versions of themselves are circulating online. AI will become a defensive play as much as offensive, as media teams at sports rights holders are forced to be constantly vigilant for faked AI versions of their athletes appearing.

In 2024, AI's impact on image and likeness will continue pivoting from reputational threat to commercial opportunity: while some issues will remain, we'll start to see certain standards emerging for athletes to grant the rights to AI usage of their likeness in exchange for a license fee.

We will see content and marketing teams using AI to streamline their approach to research and ideation, content and campaign planning and content distribution.



Trend 03

Stop saying 'social media'

As we enter 2024, it's time for sports rights holders, leagues and governing bodies to stop saying 'social media'.



The major platforms don't exist simply to connect us publicly with friends and family – that behaviour has moved to private messaging apps and groups.

The social graph has shifted to an interest graph: some of these interests we express explicitly (by following topics, brands and people on platforms) but increasingly algorithms are able to intuit and serve our interests simply by the way we behave and consume content.

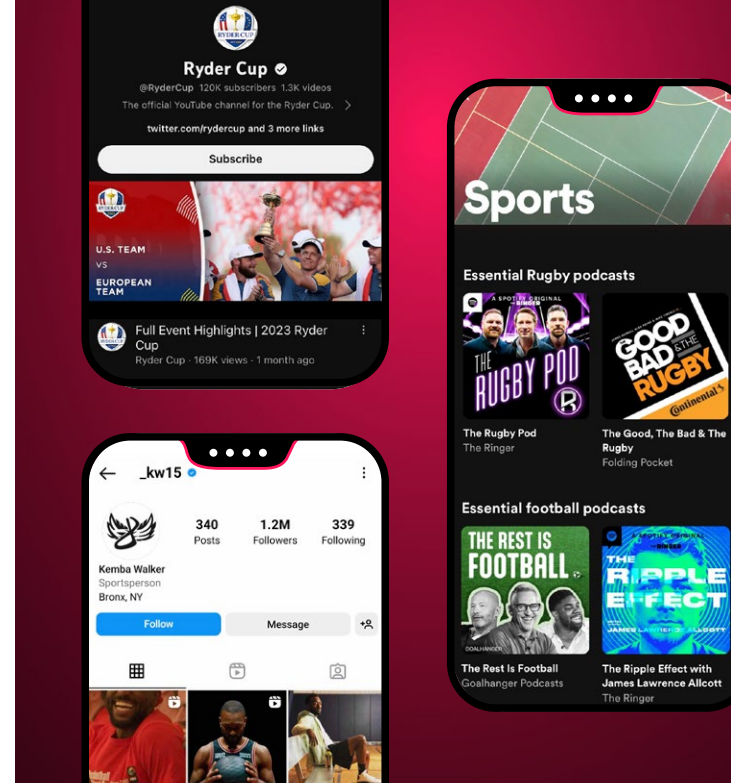
The term 'social media' has long meant different things to different people, while an ever-increasing number and variety of platforms get added into the mix. For publishers to be even remotely 'social' implies a level of commitment to, well, socialising.

This means two-way conversations and behaving as an equal in an audience of peers. This is inherently easier for athletes and individuals than organisations with accounts penned by faceless admins.

In this context, the phrase 'social media' has become unhelpful, misleading and suggestive of an old-fashioned approach to digital publishing.

By taking the emphasis off the social, sports organisations can and will reassess how they distribute and syndicate content and messaging in 2024. The mix of channels you're on will be guided by answers to questions like:

- 1 What are your key organisational objectives relating to fan engagement?**
- 2 Who are the audiences you are trying to reach?**
- 3 Which media formats are most important to your digital marketing strategy?**



By taking the emphasis off the social, sports organisations can and will reassess how they distribute and syndicate content and messaging in 2024.

2024 will see sports organisations coming off platforms where they'd previously invested a lot of time and attention. Avoid the sunk cost fallacy and consider this a good thing. If a platform no longer works for you then don't be reluctant to deprioritise or drop it altogether.

Traditional mainstay platforms have all undergone significant changes which have changed the value proposition for sports

rights holders – it's time to reassess whether they remain valuable to you.

Facebook's organic pendulum has never sat further away from brands or any publisher attempting to divert users away from the site.

It's the same story on X, where at least Owner Musk is more publicly transparent about what he wants users to do on the platform to be rewarded with reach and potential engagement.

For some this now means paying for verification to avoid becoming algorithmically irrelevant or risk a 'verified' imposter spreading misinformation under your guise. Or both!

YouTube, the most established long-form video platform, is prioritising its Shorts vertical video format to the extent that 2 billion users have now watched at least one.

Meanwhile, sports organisations have new options. It took WhatsApp, via its Channels functionality, mere weeks to accrue millions of followers for some leading sports organisations with only a modest amount of effort required.

There are more platforms than ever that you could be active on, but the impending year end should prompt a resolution to re-examine those that you should be on.

When considering your platform presence and the importance you place on each, consider four pillars of what you're using the platform to do.

PILLAR CONSIDERATIONS

Update

Break news in real-time, keep followers informed and set the record straight when required.

Entertain

Premium content, often video, which engages fans and has the potential to transcend to delight new audiences.

Revenue

Directly, through native advertising, sales or subscription. Indirect revenue through sponsorship and partnerships can be tailored to be more platform agnostic.

Community

Turning followers into fans. A platform for fans to interact with the property and, crucially, each other to create a deeper connection.

PLATFORM CONSIDERATIONS



WHATSAPP CHANNELS, X, TELEGRAM & INSTAGRAM BROADCAST CHANNELS

Owned-and-operated channels, email and push notifications will also be central to this.



SPOTIFY, TIKTOK, YOUTUBE, SNAPCHAT & INSTAGRAM



YOUTUBE, FACEBOOK, TWITCH, X & SNAPCHAT



DISCORD, REDDIT, PATREON, SUBSTACK & TWITCH

There is no reason why there should be an identikit list of platform links in the navigation of almost every sports website. If a platform doesn't help you excel in one or more of these areas, it should be deprioritised or discarded.

Some platforms may offer moderate functionality around multiple of these without specialising in any individually. You have a decision to make on these, too.

Liberating yourselves from the term 'social media' allows you to start with a blank piece of paper when considering where to prioritise your efforts and finite resources.

The classic quartet of X, Facebook, Instagram and TikTok may remain the correct prioritised mix for some. For others a top-four list may read WhatsApp, YouTube, Spotify and Discord.

Take your strategic business objectives and overlay your key target markets to find the correct balance for your organisation. In 2024, the forward thinkers in the sports industry will focus on a platform's potential impact rather than simply adhere to tradition.

Trend 04

Here comes the money:

Women's sport monetises through digital



2023 delivered record-breaking viewership across women's sport, specifically in football, basketball, golf, tennis and cricket, and the NCAA women's basketball final was the most-watched women's college basketball game in history, peaking at 12.6 million viewers (with an average of 9.9 million).

Meanwhile, there was the possibility of a FIFA Women's World Cup (FWWC) broadcast blackout in the big five European countries due to lower-than-expected bids by the major TV broadcasters. This was in line with our 2023 predictions where, despite its growth, women's sport still wouldn't see the same revenue threshold that appears on the men's side.

While many argue the expectations were too high given it was the first year of unbundled FWWC rights, the lack of a deal so close to the tournament resulted in lower marketing activity from the broadcasters, negatively impacting the coverage before it even started.

However, last year we also predicted there would be increased investment into women's sports, and in 2023 we have seen the first \$100m funds in this area – Mercury 13 and Monarch Collective, both in women's football. Mercury 13 is a multi-club ownership group that has publicly declared an intention to buy controlling stakes in professional women's football teams across Europe and Latin America, with the sports industry keenly awaiting the group's first acquisition. Monarch Collective launched its investment fund which is exclusively focused on investing in women's sports. These strategies involve an overhaul of the entire business spectrum,



The NCAA women's basketball final was the most-watched women's college basketball game in history.

NCAA WOMEN'S BASKETBALL FINAL 2023.
IMAGE SOURCE: GETTY

12.6M
viewers at peak

FIFA WOMEN'S WORLD CUP AUSTRALIA &
NEW ZEALAND 2023. IMAGE SOURCE: GETTY



from sponsorship to player scouting and the creation of a shared services model. This addresses a prevalent issue in women's sports – the lack of robust infrastructure and expertise.

We saw a change in the way women's sport is packaged – women's sport programming is given a prime focus rather being an afterthought or an add-on. Ally Financial and Disney's partnership has kicked off a new era of sponsorship with gender equity at its core. The multi-million dollar sponsorship package is aimed at increasing the coverage to grow the top of the funnel. A part of the agreement was structured in a unique way to grow investment in women's sport by creating opportunities for additional brands to join.

Women's football has led the way in increased coverage. In 2023, National Women's Soccer League (NWSL) launched its first-ever global streaming service, powered by Endeavor Streaming, giving fans much-needed access to the sport. Following that, together with WME, IMG

helped to secure a landmark partnership on behalf of NWSL, making it the largest media investment in women's sport history. It's a 40x increase on the previous NWSL rights deal.

While the women's sport commercial landscape has seen a shift for the better, a vicious cycle is still prevalent. As this [CNBC article](#) puts it, "brands say there is not enough media coverage to justify advertising dollars, while broadcasters say there are not enough advertising dollars to justify media coverage." 2023 saw the establishment of the 'Women's Sport Club' which brings together brands and sellers. This is testament to the women's sport industry maturing.

The key changes we expect to see in 2024 are that investment into women's sports will continue whilst the high engagement levels women's sport has always enjoyed will convert to tangible dollars.

On the digital side, we've seen for some time that women's sport has a very engaged,

digital-savvy audience. Fans often had to seek out information for themselves, which happened on digital platforms, and this grew highly-engaged pockets of online communities. In our experience, this always translates to effective commercial partnerships, sooner or later. 2024 is that moment.

There is already data to suggest that fans of women's sports will over-index on support of the brands that commit to it. Michelob Ultra found that fans of women's sport are 30% more likely to engage with its brand than fans of men's sports. And according to the latest Sports Innovation Lab report, fans of women's sports were 20% more likely to spend on sports streaming platforms than fans of men's sports.

In the digital era, all sports have gone on a journey from reach (literally, growing the global audience), to engagement (deepening the relationship with that audience), to monetisation (achieving return on investment). We believe 2024 will see the first signs that women's sport

is going through this cycle faster than men's sport ever did.

2024 being an Olympic year means we'll see women's athletes catapulted to global stardom – this always happens in this part of a four-year cycle. The female superstars of Paris 2024 will have greater opportunities than their predecessors to convert this through digital platforms into commercial income. The key for athletes is to prepare their channels well in advance of their moment in the spotlight – the national and global governing bodies of their sports can also prepare in advance to amplify female athletes across digital, which will be a multiplier effect for monetisation.

While this is happening, we will also see rights holders start to value women's sports separately. Up to now, rights holders have often treated women's sports as a free add-on, but we're already seeing evidence that they are starting to see the commercial benefits to it going behind the same paywalls that men's sport often is.



We believe 2024 will see the first signs that women's sport is going through this cycle faster than men's sport ever did.

PREMIERSHIP WOMEN'S RUGBY MATCH BETWEEN TRAILFINDERS & HARLEQUINS.
IMAGE SOURCE: GETTY

Trend 05

Your stadium will get smarter

Fan and commercial partner demands will put digital engagement at the forefront of the stadium experience in 2024, moving us closer to a future where venues are expected to be smart.



With fans' in-home entertainment opportunities better than they ever have been, venue owners need to step up and embrace the opportunity if they want to continue driving attendance.

The trend towards 'smart stadia' is being driven by technologies that enhance the fan experience and deliver value to stadium owners. We used to refer in theoretical terms to an 'internet of things' and like many concepts that have become reality, the term is less commonly used now but we see evidence of it all around us: smart TVs, speakers, connected cameras, doorbells, thermostats and wearable devices.

Adoption of these technologies in sports venues has rapidly accelerated thanks to lower prices and better connectivity. Fans can now stay seamlessly connected and rights holders can use this to their advantage. The value of smart stadia will come in many forms: reduced overhead costs, improved revenue, and deeper fan connections amongst others.

This will only happen if venue owners invest in the right tech infrastructure, including scalable data warehousing and CRM coupled with a fan engagement strategy that makes the large volumes of newly-acquired data useful to them.

Overhead costs will be reduced through smart solutions that control the stadium's infrastructure more effectively, regulating things like lighting, heating and cooling and helping plan the distribution of stock to stadium bars and shops.

In-stadium sales will be improved through contactless transactions and better understanding of consumer behaviour, leading to the potential of real-time product placement in advertising.



Smart stadia will help rights holders unpack their sponsorship proposition, enabling the creation of more targeted advertising for brands.

There have been many developments that have moved the industry towards smart stadia. From the San Francisco 49ers using technology to help fans locate their designated parking spots through

in-app directions, to the Tottenham Hotspur Stadium becoming the first 100% cashless stadium in the UK.

These venues have very much been the trailblazers and in 2024 we expect to see wider adoption of in-stadium technology. We'll also see more evidence of venues across live entertainment pushing the envelope of what's possible in a physical

venue. In 2023, Las Vegas opened its state-of-the-art events venue 'The Sphere' which, amongst a variety of advanced tech, gives visitors the ability to enter a virtual environment and generate an avatar, not to mention it's reported as the largest spherical structure in the world and one of the most expensive pieces of advertising real estate. Stadia no longer have fixed addresses. They are institutions

and edifices experienced across broadcast, social media, gaming and in-person. Technological advancements are now enabling rights holders to better reflect fan passion and partner needs, generating a better experience and more revenue. In 2024, your stadium will get smarter than ever.

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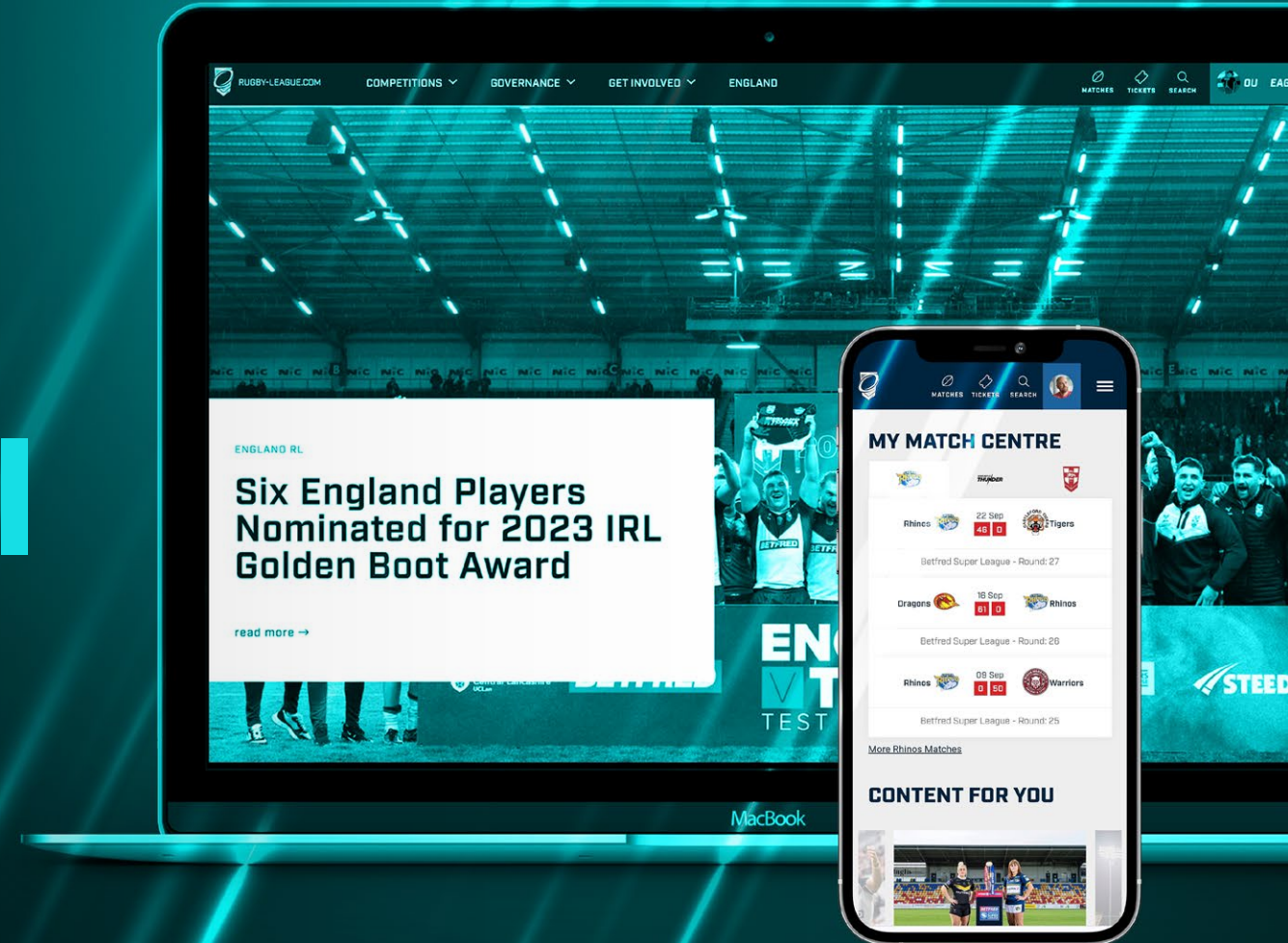
'THE SPHERE', LAS VEGAS, NV.
IMAGE SOURCE: GETTY



Trend 06

Personalisation becomes business critical

Personalised experiences are now an expectation, not a frill. Consumption options will change because they have to, before audiences drift away.



Sports rights holders, broadcasters and platforms that can create easy ways for more niche areas of society to experience their live product, will win.

The driving forces behind this trend come from changing consumer needs. Every sport worries about an ageing audience in-stadia and on TV, and the scale of competing attractions for the attention of Gen Z (and their successors Gen Alpha, born after 2010) is well understood.

An expectation of personalised services is simply how everything else has always been, for anyone born this century. Their social media, music, TV, film and gaming platforms have never *not* included algorithmic recommendations or a feed that's titled 'For you'. That has become the standard and anything that falls outside the user's interest is considered a failure of the product serving it to them. This is what sport is competing with, and realistically reaching that level of sophistication with any league or club-owned product is a long way away.

What rights holders *can* do is put foundations in place to support at least a 'hygiene' level of personalisation. Hygiene functions are ones that no-one praises when they're done right, but everyone complains about when they're missing. Even this requires significant focus.

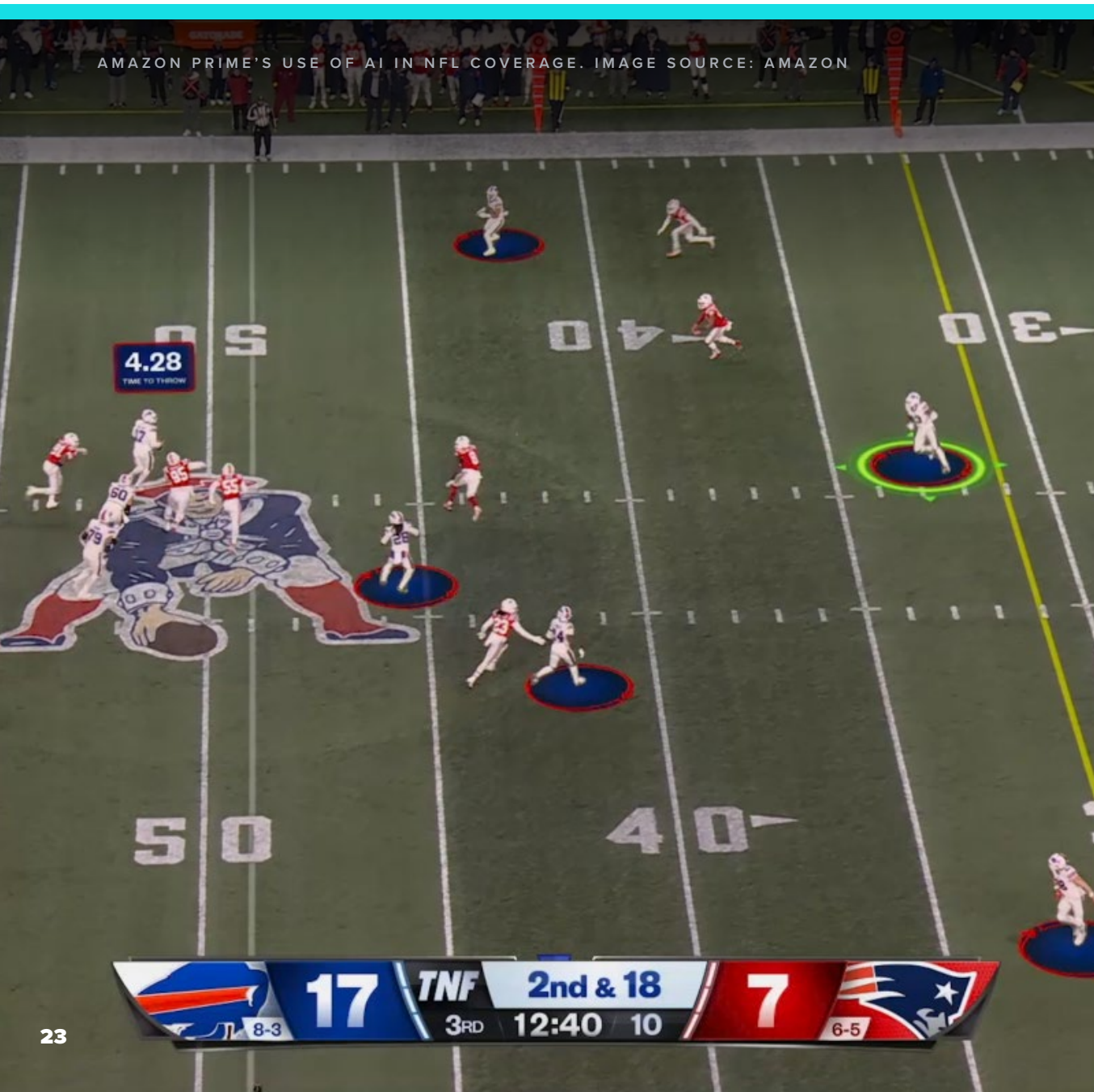
At IMG, we are in the third year of a digital transformation process with EuroLeague Basketball. This is a growing league with a great product, youth appeal and fans spanning multiple languages, and cultures – and lots that can go wrong if you don't get the hygiene part right.

At the start of that transformation, EuroLeague invested in marketing tech (martech) to make personalisation possible at scale. And then invested in software engineering resource to connect the ecosystem data together (web and app,

EuroLeague Fantasy Challenge **2023-24 SEASON**

IMG

EUROLEAGUE'S FANTASY CHALLENGE. IMAGE SOURCE: EUROLEAGUEBASKETBALL.NET



a popular Fantasy product, live scoring APIs and a direct-to-fan OTT service). And again, on the agency and internal skills to operate this tech.

Now, for example, the automation of local currency and price information in email and push marketing for EuroLeagueTV is standard. This meets a base user expectation and has a good impact on conversions and is one of many incremental markers of progress for the project – but the effort required to build the foundations that deliver those improvements was significant.

Most rights holders aren't at that level with martech yet, but it will be table stakes before the end of 2024.

The headline-grabbing developments in personalisation will come from broadcasters and platforms like YouTube and TikTok; broadcasters in particular have to keep innovating, because if they don't, they won't have a business anymore.

We've seen this recently with the Premier League and Premier League Productions partnering with Sky Sports to trial a 'Game mode' camera view to mimic the typical video-game perspective of a match.

Amazon Prime's use of AI in their NFL coverage to forecast and highlight on-screen "when defensive players are about to rush the opposing quarterback" is another example of tech adding new experiences to live sport consumption.

It won't be what every viewer wants, but it will be what some want, and this continual delivery of new niche ways to follow the live experience will be the key to sports' enduring popularity and growth with youth audiences.

Live sport delivers regular, shared mass human experiences in a way that no other media or entertainment sector can do. Regardless of how someone follows the event – on TV or radio, on a live blog, on social media, in the stadium, through a visualisation using live positional data

in Minecraft or Roblox – every person is experiencing the same event. And this happens multiple times a day around the world.

Shared experiences provide the talking points and common ground that binds neighbourhood, school and workplace communities together. As more people develop more relationships that are primarily online, that common ground with real-world neighbours becomes scarce; it is not positive for those local connections to weaken.

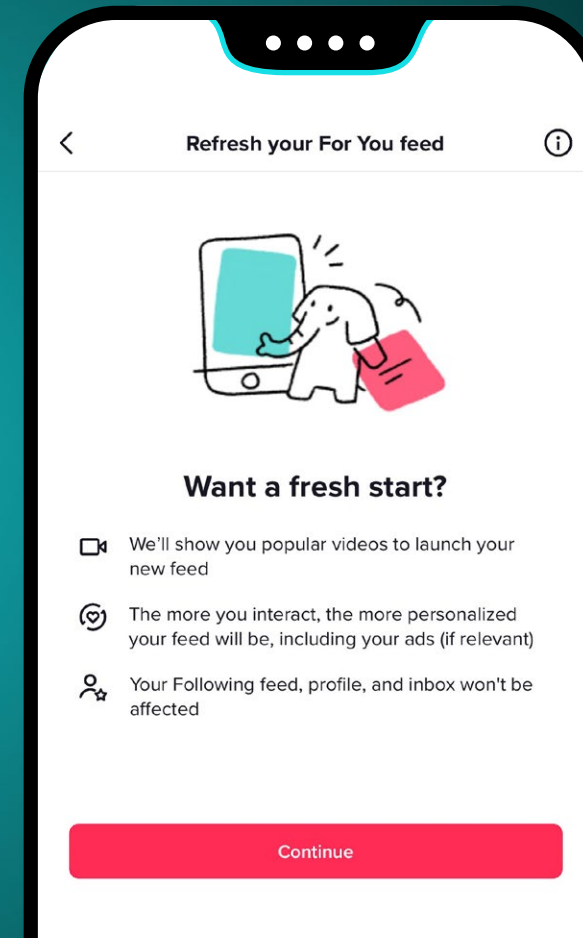
If the sports industry doesn't act to maintain this (by ensuring the next generation still follows these live events), there really aren't other sectors that can replace this impact.

TV and film no longer do it – content is so abundant that the chances of bumping into anyone in the office who watched the same thing as you last night are slim. If you're even in an office.

Music today is brilliant and genre-defying and live concerts are still a unifying experience – but everyone having easy and cheap access to 'all music ever' means new releases are rarely major events now.

Gaming grows huge communities and those absolutely have societal value, but since they are primarily a participatory experience, even individuals who play the same game see different events.

Sport is alone in being able to play this role in society; greater personalisation has to be the way it retains that status, because a broad-brush model simply won't work for the next generations.



Developments in personalisation will come from broadcasters and platforms like YouTube and TikTok; broadcasters in particular have to keep innovating, because if they don't, they won't have a business anymore.

Trend 07

The rise of the mega influencer

In 2023, we saw Cristiano Ronaldo join the Saudi Pro League, Lionel Messi move to Major League Soccer and Taylor Swift start dating the Kansas City Chiefs' player Travis Kelce.



These seemingly unrelated events have all been the equivalent of tidal waves in their respective leagues, creating a buzz, attracting new fans and driving growth opportunities.

For the past decade, most sports rights holders have held onto influencers for dear life, but the quick hits, measured through pre-agreed posts and in millions of impressions, haven't always been enough to convert new fans into hardcore ones. Longer-term and deeper influence is needed. Ultimately, it's about creating value for the sports property, rather than it being transactional and fleeting. So, what is real influence and how can Taylor, Lionel or Cristiano have a bigger effect over a league in a matter of months, than years of work by micro and macro influencers?

Since September, the Swift-Kelce romance has taken the NFL by storm. Kelce's jersey sales increased by 400% within days; the player gaining over a million followers in a month. Google searches for the Kansas City Chiefs increased 13-fold over two days; Sunday Night Football ratings increased

by over 50% with female viewers under the age of 18 during the Chiefs-Jets game in October. Kelce's 'New Heights' podcast jumped to number one on Apple's charts.

Like all sports properties, the NFL wants to attract new audiences and safeguard itself for the future. It has demonstrated this time and time again – most recently with the Toy Story broadcast in October 2023. With viewership figures for young women at an all-time high, this is the perfect time for the NFL to convert Swifties into NFL fans. The league will have to consider a series of digital initiatives over several months that resonate with this audience to convert them into long-term fans, as well as knowing which channels to reach them on, regardless of how long Taylor and Travis stay together.



The Swift-Kelce romance has taken the NFL by storm. Kelce's jersey sales increased by 400% within days; the player gaining over a million social followers in a month.

IMAGE SOURCE: GETTY

650% increase in Saudi Pro League's revenue after Cristiano Ronaldo joined.

IMAGE SOURCE: GETTY



Some athletes transcend their team or even their league and have significant influence on their entire sport. After Messi joined the MLS, it's been said the number of MLS Season Pass subscribers on Apple TV more than doubled, while Inter Miami's Instagram following is now bigger than any NFL, MLB or NHL franchise. Ronaldo has had the same effect on the SPL. He has helped the league drive traffic to their e-commerce website, increasing from 10,000 monthly visits two months before he joined to 300,000 monthly visits when he signed in January 2023. According to Carlo Nohra, SPL's Head of Operations, Ronaldo also increased the league's revenue by 650%, while research shows he helped fill an additional 20% of seats at the home stadium of his team, Al Nassr Football Club.

Beyond jersey and season pass sales, the key for the MLS and the SPL will be to keep attracting top talent and enhance the level of athleticism across the leagues. This can ultimately create better products for fans to watch and grow fandom over years, not just at the time of big signings.

The landscape has changed and having over a million followers on digital platforms is not enough to define a mega influencer anymore. In 2024, sports rights holders will need to look at what's happened with Swift, Messi and Ronaldo and assess what or who will have long-term influence on building long-term fandom.

Equally, some athletes will consider how they can benefit long-term from joining a certain league or club. This was true in 2007 when David Beckham put the MLS on the map for European fans. He went on to launch Inter Miami in 2018 and signed Messi five years later, having a long-term positive impact for himself but also on fan growth for the MLS. A financial stake may not necessarily come in the form of club ownership. Revenue share and medium-term incentives, measured through commercial partnerships or increased digital engagement, are both avenues to be explored by smaller rights holders.

Celebrity investors can have an influence on fandom. Ryan Reynolds and Rob McElhenney's investment in Wrexham A.F.C. is the perfect example. It has had an impact on both on-pitch performance and within the local community. While Wrexham had the advantage of starting off with a very loyal local fan base, Reynolds and McElhenney have brought the club global attention because they were able to tell a story and make sure people heard it, through *'Welcome to Wrexham'* – FX series which is shown on Disney Plus in the UK – and also through their own digital media channels.

Clubs and leagues can also look to diversify their portfolio of investors, just as the team has done at Angel City FC, focusing on attracting high-profile, primarily female, Hollywood executives and celebrities to invest in the club. Having the likes of Natalie Portman, America Ferrera or Christina Aguilera brings a different cachet to what football club ownership means. These celebrities can generate a new interest in the sport as their audiences are not those traditionally associated with it.

Sports rights holders are realising they need to go beyond the pitch and become part of everyday life, including how people dress. Certain sports teams are ahead of the curve, with the likes of Crystal Palace appointing Kenny Annan-Jonathan as their Creative Director or the New York Knicks making Ronnie Fieg, founder of mega brand Kith, their Creative Director.

Ultimately, a community is built by people who identify with similar values, whether they be moral or material ones. In sports and fashion, a brand is about how it makes people or fans feel, the values it represents and how its aesthetics fit into the fans' lives. Sports rights holders need to take advantage of any initial entry point which helps extend their fan base, even if that means their cap becomes more famous than their team.

In 2024, rights holders will need to reassess who or what that entry point to fandom is, and what types of long-term partnerships will truly move the needle in their favour. They need to start by defining who they

want to target and know what outcome they want from any partnership. Only this will allow them to find the right partners to help them achieve these goals, whether they be celebrities, investors, musicians, gamers or other organisations.

Once a plan is in place, rights holders will need to engage audiences with campaigns

tailored to them, reaching them on their preferred channels. Sports properties will need to give a reason for these fans to come back to them regularly whilst educating them on their sport. Results will show not just in new followers, but in the form of higher search volumes, e-commerce sales, improved brand affinity and growth in broadcast audiences.



ROB MCELHENNEY & RYAN REYNOLDS
CELEBRATE WITH THE VANARAMA
NATIONAL LEAGUE 2023 TROPHY.
IMAGE SOURCE: GETTY

Appendix

Platform power rankings

#1

TikTok



#7

LinkedIn



#2

YouTube



#8

Discord



#3

Instagram



#9

Snap



#4

Facebook



#10

Reddit



#5

WhatsApp



#11

Twitch



#6

X



#12

Threads



For the first time ever, we're ranking the most important third party media platforms for the global sports industry.

We arrived at the rankings through a detailed analysis of where we see clients putting their efforts, the results they're achieving, the audience profile and growth opportunities specific platforms offer, the commercial reality and commercial potential of each platform and the functionality they offer both rights holders and users.

In our inaugural list, TikTok secured top spot, closely followed by YouTube and Instagram – together they form the 'top three' with a significant gap between them and Facebook in fourth place.

If we'd compiled this list a year ago, WhatsApp probably wouldn't have made fifth spot but it's a platform very much on the rise and comes in above more established

platform X – which has had a well-publicised and difficult year. Clearly, an organisation's unique goals and circumstances should dictate what this list looks like for you. If you're targeting a younger audience based in the US and Middle East, Snap would be higher. If your business is premium hospitality, LinkedIn will play a much more important role.

We also didn't consider platforms where the userbase's main language is not English. For more understanding on how sports teams are using Chinese social media, Mailman's annual [Red Card report](#) is a must-read and the [2023 edition](#) provided detailed insights on Weibo, Douyin and Bilibili. For a comprehensive guide, please check out the [guide](#) by KAWO.



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