



DIGITALSPORT

#DSTRENDS2018

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INTRODUCTION

A very happy New Year to you and welcome to our look ahead to what 2018 could hold for us through the eyes, not of industry observers, but those on the front line who are working either at governing bodies, teams, media companies or as consultants.

All the people involved in this report have been guests on the Digital Sport Insider Podcast, a project I've been privileged to bring to the world and has enabled me to meet and interview some of the very best in the industry. To hear them, and many others, you can subscribe on iTunes, Audioboom, Stitcher Radio and other leading platforms.

For this report I asked 3 simple questions to enable us to get a feel for what has been and what is yet to come. They were;

- What have been your highlights of the past 12 months?
- What specific opportunities are you excited about within digital sport in 2018?
- What threats do you see for the industry?

I hope that through reading their insights you can build a picture that will help you to plan ahead within your role. As with everything we do at Digital Sport we want to be able to provide the tools and information that allow you to get ahead through reports such as this, DigitalSport.co, the events and of course the podcasts.

This year we will also be linking up the events, articles and podcasts as each month we will take a look into certain themes to provide an in-depth opinion on each one and see how we can help push the industry forward within them. Starting this month with OTT and then in February we'll be talking VR, AR and MR. Keep an eye on the website for the information.

Thank you to all those who took part, and to you for downloading this report. I hope you have a fantastic year and that we can meet in either London or Manchester at one of the Digital Sport events.

Kindest regards,

DAN MCLAREN
FOUNDER & CEO,
DIGITAL SPORT

A handwritten signature of Dan McLaren in black ink, written in a cursive style.



2017 HIGHLIGHTS

#DSTRENDS2018

2017 HIGHLIGHTS

AMAR SINGH HEAD OF CONTENT, WEST HAM UNITED

Personally, it has been moving from online publishing into a club and having the opportunity to bring my experience and approach to content strategy to West Ham United.

It's hard to summate just how varied and fulfilling my job is and the canvas my team has to work with.

Highlights for the West Ham content team include launching a series of successful formats including Ironworks, Hammers Heritage, Watch With, GIFS of the game, relaunching our matchday programme and more...

Right now we are in the midst of our end of year '12 days of Christmas' content series and we have had a lot of fun putting that together.



2017 HIGHLIGHTS

STEVEN ENGLISH HEAD OF CREATIVE SERVICES, WILLIAMS F1

A major highlight of our last 12 months has been the success of the increased investment we've made in video content. We've achieved more than 10 million views across our platforms in 2017.

To put that into context, we'd had about three million in the all the previous years combined, so it's colossal growth for us.

We've successfully capitalised on some incredible opportunities to create content that we know our audience is passionate about, and we'll be working to continue that trend in 2018.



BOB TAIT HEAD OF DIGITAL, MIDDLESBROUGH FC

My highlights of the last 12 months? It's been bonkers. Setting the foundation from which to launch the club's digital capability. New department and new strategy.

Developing our own digital platform: App upgrade (more to come); launched new, bespoke website (came out of EFL Digital); commenced work on data segmentation. Launched, evaluated and 'sidelined' a VR app!

Strategy education pieces with club personnel and partners. The real highlight? Doing all this whilst successfully raising my daughter to reach her first birthday, although my wife must take most of the credit there!



2017 HIGHLIGHTS



ANDREAS HEYDEN CEO, DFL DIGITAL SPORTS GMBH

Massive growth in interest in and engagement with the Bundesliga content on social and traditional media

The success of great innovative digital projects from our clubs – from AR App (FC Bayern München) to Mobile Ticketing (FC Köln) and Data Driven Management (TSG Hoffenheim) as well as many more...

Our change from distribution of Standardised content to tailor-made content production (partner specific and market specific)

Launch of augmented reality toolkits by major platforms and opportunities to connect online and offline

More players entering the sports rights market which are coming from a non-broadcast background and will be innovating the viewing experience

RINA RASOLOFONIAINA DIGITAL CONTENT MANAGER, FIBA

I would say that the main highlight is the launch of the FIBA Basketball World Cup Qualifiers, sport's biggest centrally managed worldwide competition.

More than 312 million fans were reached on digital platforms in such a short amount of time...We have also managed to raise the profile of the FIBA Basketball World Cup 2019 by reaching 1 million fans on our Facebook page in only 6 months.

After years of conversations, I finally achieved to have FIBA's first-ever Twitter branded emoji for #EuroBasket2017. And FIBA's Social Media platforms are still some of the most popular ones among international sports federations.



2017 HIGHLIGHTS

JAMES DICKENS HEAD OF SPORT, YAHOO

I've enjoyed the innovation in US sports, driven by federations.

Mobile specific NBA streams, VR, 360, being able to watch every game your team plays in the NFL.

It's something the Premier League needs to learn from.



PAUL RAYNER PUBLISHER, SPORTBIBLE

Passing 10 million Facebook followers on SPORTbible, sponsoring an F1 car, working commercially with Nike, Lucozade and countless others.

Speaking at SoccerEx was good, but the highlight was recording the DigitalSport podcast obviously.

I've had a lot of feedback on that!



2017 HIGHLIGHTS

JAMES KIRKHAM HEAD OF COPA90

I've loved seeing the world catching up; COPA90 was born in this era, born for this digital sports world. But for over 5 years it has been about waiting for other elements to get further ahead.

Now this is it. This is the era where sports consumption and sports media is entirely driven and lives in a digital space. It is a digital only narrative.

I've loved seeing this play out for real. Something that went unnoticed to media people but was huge in my eyes was the announcing of Manchester United's record-breaking summer transfer this season.

This was once only broadcast in the most traditional manner, stage managed and controlled through a club and leveraging the manager only in a properly orchestrated event from the top down. But THIS year, it was announced to the whole world in all of our personal Instagram stories feeds.

It was announced by Paul Pogba, who shot a comedic film skit around an LA pool in the summer with his friend Lukaku. It was announced through his own social, into our streams, done their way as they wanted.

Without a hint of interference from any more official capacity. It says so much now about modern consumption, about how we expect to view our talent, how we expect to embrace a new story too.



2017 HIGHLIGHTS



TOM HALLS **HEAD OF STRATEGIC DEVELOPMENT & FRANCHISES, GFINITY**

Launching the first true path to pro esports competition and securing linear broadcast coverage around the world with it.

We've created a viable route for aspiring gamers to go pro and built and infrastructure around it that allows individuals and teams to develop

The refreshed NA LCS League of Legends series in the USA. We've seen a number of endemic sports brands enter, so it's been invigorating to see adoption of esports into the mainstream continue to grow.

SEB CARMICHAEL-BROWN **COMMERCIAL DIRECTOR, HASHTAG UNITED**

The highlights for me personally was our Wembley Cup final in partnership with EE.

Our very own Hashtag United playing football to a live, paying 34,000 spectators in our national stadium with millions watching at home.

It was something groundbreaking on an digital sports industry front but also truly magical to experience first hand on the pitch as well. :-)



2017 HIGHLIGHTS

RICHARD CLARKE SPORTS DIGITAL CONSULTANT

I have enjoyed the blossoming of F1 since the social media shackles were taken off.

Esports also barged its way into the limelight and I can see it getting more mainstream media attention in 2018.

But it needs a set of star players to compete responsibly and respectfully for top honours in order to breakthrough.



ALEX TRICKETT SPORTS CONSULTANT

Innovation-wise, Instagram had a standout year in 2017, winning increased loyalty from teams and athletes with every new Stories feature. It's notoriously difficult to keep innovating at such pace.

It will be interesting to see whether Insta can keep the momentum going in 2018, or whether the chasing pack steal back some of the limelight.



2017 HIGHLIGHTS

ALEX FENTON

LECTURER IN DIGITAL BUSINESS, SALFORD UNIVERSITY

The growth of esports has been phenomenal and will be one to keep an eye on.

The idea that virtual characters and amateur teams like Hashtag United can engage millions of fans around the world is brilliant.

It gives all of the gamers and people who are not naturally gifted at sports to become part of the story. Ambush marketing campaigns such as those at the Euro 2016 were also fascinating.

Iceland supermarkets working with the Iceland football team and Jimmy Bullard will be an enduring image and shows that smart brands on lower budgets can use digital to engage people through clever and interesting digital content and campaigns.

I also enjoyed the #VenkysOut social media campaign by Blackburn Rovers fans. It didn't work, but it was fun and enabled fans online and offline to engage with each other for a common cause.



2017 HIGHLIGHTS

BEN W.S MILLER

DIRECTOR OF COMMUNICATIONS, ACTYVOS GROUP / COMMON GOAL


Being part of Common Goal, an innovative social movement in which football leaders pledge a percentage of their salaries in order to empower high-impact soccer charities around the world.

I'm proud to have helped a small team, in the space of only 5 months, create an established movement currently with 33 players from 6 continents, plus a Bundesliga coach and the President of UEFA.

Best summed up in a message sent to me by a middle-aged lady from the North of England: "I've been a football fan the whole of my life and Common Goal has restored my faith in the sport."

Also seeing my 9-year-old scoring a goal in the top left hand corner against FC Barcelona at the club's gleaming training centre, two pitches along from where Messi and the rest of the first team train, in a match that his small-town team won very unexpectedly 3-4. Anything is possible in sport.





OPPORTUNITIES

#DSTRENDS2018

OPPORTUNITIES

AMAR SINGH

I expect to see more brands and major companies activate around specific digital sport activations. This could be around growth areas such as esports or simply around major fan engagement opportunities in the online space.

Social media presents an opportunity for clubs to engage and interact with fans in a meaningful way.

I think we'll see more people in the commercial world look away from traditional advertising such as perimeter ads or shirt sponsorship to activate in the digital space.

Also expecting to see big developments in areas such as OTT, live social media content such as Facebook Watch, podcasts - which are in the midst of a brilliant renaissance - and direct social media campaigns.



OPPORTUNITIES

STEVEN ENGLISH

In sport as a whole, I'm excited to see how rightsholders evolve their broadcast models to take coverage to audience – live, highlights, round up, etc.

And how opportunities here are taken, either direct, or with existing/traditional or new broadcast partners.

For Williams, one opportunity we're excited about for digital in 2018 is developing the personalised experience we can offer – both the benefits fans can enjoy as a result, and the value it can bring back to us as a business.



BOB TAIT

I'm actually excited about data and in particular, GDPR! It's got to be of benefit to hugely important permission based marketing initiatives; yes, numbers (vanity) will drop but the end pots will result in more targeted campaigns with willing recipients prevailing (sanity).

I'm also excited about the OTT offerings and models that sport can provide and the opportunities to create some really engaging content; everything from broadcast standard pieces with high production values through to off the cuff UGC.



OPPORTUNITIES



ANDREAS HEYDEN

Further acceleration of the “voice” trend with a fast-growing ecosystem expanding the media space into the smart home.

Social Payment within social networks enabling new content business models. WeChat’s take on Europe trying to gain relevance in the social, messaging and payment space.

RINA RASOLOFONIAINA

The fact that Social Media/Digital platforms are getting more and more involved in sports broadcasting rights. You see Twitter, Facebook but also Amazon becoming legit options for distributing the best sports events.

We have to adapt to fans’ behaviors so to fully reach our audience we need to show sport straight in their hands, on their mobile.



OPPORTUNITIES

JAMES DICKENS

Seeing where the next round of rights goes will be extremely interesting. Is this the moment where tech companies push past traditional linear broadcasters and give fans different viewing and most importantly, payment options.

It's a matter of time, but my hunch is that it will more likely be in three years. Watch out Sky, they ARE coming.



PAUL RAYNER

The continued defragmentation of sports rights.

Over the last year we have broadcast football, street football, rugby league, beach volleyball, table tennis, boxing and MMA. This is only the beginning.

OPPORTUNITIES

JAMES KIRKHAM

Digital Sport 2018 will I think see a revolution in sponsorship packages and therefore far greater invention in activation.

If you look just at Turner acquiring rights to the Champions League for example, the simple time of each game for a US audience means this is a world away from solely looking at shiny TV shows and in stadium exposure.

The time of total digital assets is now here, so what that means for brands in sport is super exciting. It means we are likely to stop seeing smart inventive digital only as an add on or a nice to have and instead see it as core.

It means too that mobile at the heart of all consumption changes the parameters for how people consume sports and for this to be better leveraged than it has ever been before.

Just as the monster media players enter the rights game (such as Amazon and Facebook) so we will see a total change in narrative; no longer a clumsy relationship between TV in the corner of a living room, and second screen - but instead about consumer journeys which are hyper localised and personalised.

Watching the game on your phone, perhaps via a micropayment using your thumbprint, perhaps all via the same messenger environment will change a lot about how we look to leverage digital sports in all its different forms.



OPPORTUNITIES

TOM HALLS

The traditional industry's current fascination with esports and the younger demographic they control.

Traditional viewing methods continue to fade and dynamic new OTT and UGC consumption services such as Twitch continue to grow

I'm really intrigued to see how the industry reacts from a rights and platform perspective.

SEB CARMICHAEL-BROWN

The continuing growth of IRL YouTube/online football as a space and a medium to engage with fans and football culture.

The type of content opportunities this presents are really very exciting especially with a new player looking to enter the mix in the form of "Facebook Creators" amongst other platforms continuing to develop new publishing tools to help us tell stories to our audiences in new and creative ways.

The continuing rise of esports is another very exciting prospect with new ground being made every month in that space right now too!



2017 HIGHLIGHTS

RICHARD CLARKE

I think that AR is a very interesting, if overhyped, space and I believe that 2018 could see the start of significant innovation from rights holders.

There are some straightforward routes to monetisation so it may be one of those oft-quoted 'hot topics' that has real substance.

Also it will be interesting to see rights-holders thinking as brands outside the traditional confines of sport.



ALEX TRICKETT



It's clear that the sports rights landscape will continue to transform at pace, as new packages go to tender during 2018.

The big question is whether exclusive rights to any tier one leagues or competitions (Premier League etc.) will be snapped up by a pure-play digital platform like Facebook or Amazon.

There's a growing suggestion that this might happen, and if it does, it will likely help to open the floodgates for direct-to-consumer sports rights propositions.

What is certainly clear is that traditional custodians like Sky and BT Sport, will continue to have to adjust their models - and even to collaborate with each other - to stay relevant.

OPPORTUNITIES

ALEX FENTON

As generation Z turn their attentions away from TV and even more towards their various devices, this provides more opportunities for interactive and innovative content. Live streaming and video will continue to increase and it will be interesting to see how the major digital providers will continue to claim a share of the pie.

Sports clubs will become savvier with their use of social media channels, content and data in order to reach and engage a global audience.

This will include reaching out and engaging directly with fans around the world and producing the right content for their audiences, fuelled by increasing levels of fan generated content.

Thanks to the success of projects like Pokemon Go, AR is starting to make some inroads into digital sport. VR headsets and software are improving, but experts question the solitary experience of VR.

I am excited about the potential for VR to create social experiences around sport. If the majority of fans cannot make it to a stadium, it will be interesting to see what immersive environments and social VR and apps can do to extend the social match experience.

Clubs have only scratched the surface with apps. Many club apps do not offer much more than an extension of the website, fuelled by kickback from betting companies, so apps will have to evolve further to take advantage of their capabilities.

Clubs are interested in corporate social responsibility and fan engagement, so therefore fitness apps and the Internet of Things will play their part increasingly. Apps that are not engaging will be unused and deleted.



OPPORTUNITIES

BEN W.S MILLER

I'm very excited to see how the tech giants (such as FB, Amazon, Netflix) continue to unfurl their sports strategies, particularly in European football. It'll also be fascinating to see how the more enlightened rights holders take advantage of new opportunities digital platforms present.

It's going to be disruptive, occasionally messy and wonderful to be part of. I'm also looking forward to seeing the esports bubble burst, and then quickly continue to grow again in the "sports simulation games" space, that traditional sports are vying to exploit.

I'm also keen to see that younger millennials, and consumers in general, come around to the idea that quality content, at its objective best, is an absolute necessity and as such needs to be paid for.

If not we'll end up with... well, what we have: the situation in Catalunya where I live, Brexit where I come from, plus Trump, fake news, far right, corruption, global warming, poverty and conflict. It's not sport as such, but it's all connected.





THREATS

#DSTRENDS2018

THREATS

AMAR SINGH

I think in digital sport right now it's all about opportunities and innovation rather than threats. One area that concerns me, however, is the cloak of secrecy that social media and big tech organisations operate within.

Facebook change their algorithm and everyone has to completely pivot and reshape their organisation. Fake news, click bait and fraudulent e-commerce operations are thriving.

It's highly important that the tech companies work hand in hand with rights holders, quality publishers and, in our case, official sports organisations to clamp down.



THREATS

STEVEN ENGLISH

One challenge is navigating the constantly moving landscape. Decisions we made or opinions we held, even as little as 12 months ago, could have very different consequences in another 12 months' time.

Wherever you need buy-in from the business, investment in resource, capability etc, that takes time.

But you need to be agile enough to change direction quickly; otherwise you risk looking on with envy as the first adopters reap rewards while you're still trying to do your three-point turn.



BOB TAIT

A growing challenge to me is how to engage Generation Z in what we are doing. And I mean properly engage.

Not just digitally, but sport in general needs some solid ideas here. Another threat could be new central broadcast deals undertaken collectively.

Might these be too restrictive for individual clubs? Might they be too rigid and not flex enough to move with the times and on going tech developments?



THREATS

ANDREAS HEYDEN



Too little investment into broadband infrastructure (landline and mobile) in urban areas to relieve the last mile jam within cities as well as enabling high-speed internet connections in rural areas.

Dismantlement of net neutrality regulations endangering the core of many internet business models.

RINA RASOLOFONIAINA

I think that it is going to be harder and harder to capture fans' attention.

The competition is now so super tough because on Social Media timelines you're now up against other sports entities but also media, athletes, entertainers, memes, brands, fans' friends, etc.

To make the puzzle even more complicated, you see that now Social Media platforms are also seriously thinking about moving content from non-personal pages out of the main feeds so you have there another pretty disturbing obstacle.

Trying to have your content emerge in all of this will require incredibly strong strategies.



THREATS

JAMES DICKENS

Mobile penetration outside sport is increasing but no sports companies have worked out how to own the mobile experience.

If a start-up can work out how to do this via live or AR/VR second screen then they could be onto a winner.



PAUL RAYNER

There is always something new coming along. We are aware of that, and actively position ourselves to be able to respond quickly. In reality these threats represent opportunities.

2 years ago we weren't monetising Instagram, we are now at 2.5 million followers and it's a decent revenue stream for us.

But we need to keep our ears to the ground, and to do that we've employed 3 17 year olds. They are our Snapchat leads, heavily involved in building our Insta, and constantly letting us know what they use socially.

The threat is going all in on another Vine though, it's important for us to choose the right battles.

THREATS

JAMES KIRKHAM

I can't see a single threat to digital sport in 2018, really. How could there be?

This is the means of communication, the means of consumption, the means of reaction, the means of spreading your enthusiasm.

This is every single aspect now without compare and without obstacle. There is no threat, only immense opportunity.

TOM HALLS

Esports. Our research shows that more and more younger viewers are choosing to watch competitive video games and their favourite streamers over the more traditional sports.

We're a time-poor society that needs to be entertained and captivated – that's becoming more and more difficult with the saturation of our digital worlds.



THREATS

SEB CARMICHAEL-BROWN

The main threats are simply people or organisations that put a barrier on what can be achieved in this sector.

We have been very fortunate with what we have been able to achieve with Hashtag United in these past 18/24 months, however in our minds are only just getting started! :-)



RICHARD CLARKE

Greed, lack of cohesive thinking and short-termism, but you could say that every year.

The dominance of Facebook and its subsidiaries is a potential problem. We should not hammer anything or anyone because of success but, at the same time, their market control could strangle innovation or at least make it innovation 'their way'.

Speaking generally about social media, I see some early signs of a backlash beginning, celebs taking a break and general fatigue at daily diet of bile that we sometimes have to swipe through.

We have seen in the last 18 months how the reputation of a 'Millennial company' like Uber can change. There have been challenges for the social media companies already and there will be more to come.



THREATS

ALEX TRICKETT

Away from live, I'm fascinated to see what impact AI will have on the way that as-live or post-match highlights are put together.

Many sports struggle to pull in big live audiences, so the challenge for them is to clip killer, social-first video, which people will share - and talk about - after the event.

As we arrive at a point where it is realistic for the creation of this content to be at least partially automated, does this help or hinder rights holders and their audiences?

Is a bigger bank of AI-driven content better than fewer editorially-curated pieces? Time will tell.



ALEX FENTON

All of the above require a stable and robust internet connection. Will the rise of hacking and political factors hinder the growth of digital sport in 2018?

Probably not, but there is no doubt that connected devices need new technologies in order to progress digital sport to the next level.

This may require virtual currencies underpinned by technologies such as blockchain, or perhaps even more dramatic changes in the foundations of digital.



THREATS

BEN W.S MILLER

On a micro level I can see increasing conflict in football as new entrants start to clash with existing entities, many of whom are already competing against each other in the quest to meaningfully monetise content.

Players will have a big part to play in all of this, as although their fame is ephemeral, so is the attention span of most consumers, and it's the star athletes that drive digital engagement.

On a more macro level - I worry that many of the traditional power brokers in football continue to ignore that blatantly obvious need for the sport to evolve and change.

From a middle-aged, middle-class white bloke this may sound twee but football is crying out for more diversity - gender, race, age, economic - and more transparency and a greater social commitment.

