

SELECTED COMMERCIAL TRENDS IN SPORTSBUSINESS 2017

THE EMERGENCE OF NEW MARKETS, LED BY CHINA

CHINA, RUSSIA AND MEXICO HAVE EMERGED AS INFLUENTIAL NEW MARKETS FOR SPORT



... AND MENA & PARTS OF ASIA ARE ALSO GROWING & PROFESSIONALISING AS SPORTS MARKETS

NEW AUDIENCES AND NEW AUDIENCES HABITS DRIVING CHANGE

WOMEN'S PROFESSIONAL SPORT CONTINUES TO GAIN TRACTION, BUT MORE TO DO...



Major events in 2017

- More investment and promotion
- More broadcast interest
- Rugby League World Cup played in parallel with men's for first time



Leagues leading the way

- WTA: enhanced digital presence for 2017
- WNBA celebrated 20th anniversary in 2016
- UK's Women's Super League establishing broadcast/sponsorship credentials



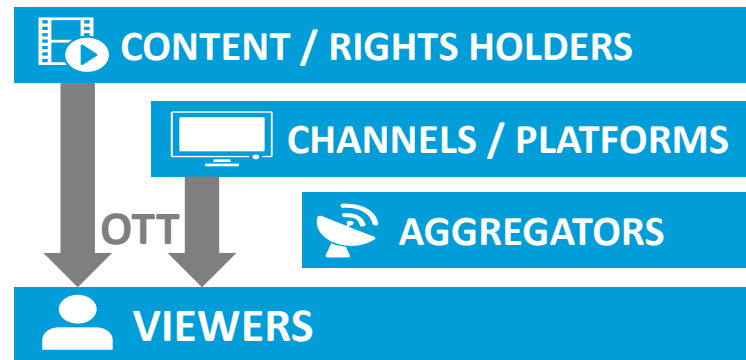
Elite and grassroots investment

- Greater investment in mature markets.
- Powerful social and media campaigns achieving cut-through
- More female professional athletes signing endorsement deals.

OTT & SOCIAL MEDIA REVOLUTIONING THE VIEWING EXPERIENCE

THE OTT GOLD RUSH IS UNDERWAY, MOTIVATED BY A DESIRE TO REACH FANS/AUDIENCES DIRECTLY

- Over-The-Top (OTT) content is **distributed over the internet**, which can be seen on your computer or your TV.
- Takes advantage of the **low cost of internet bandwidth** compared to satellite uplinks or cable network set-ups.
- Move to OTT encouraging viewers to “**cut the cord**” with their cable operator.
- OTT can be **paying or free** for the final user.



SOCIAL RESPONSIBILITY INCREASINGLY DRIVING DECISION-MAKING

A RECOGNITION THAT SPORT CAN PLAY A MAJOR ROLE IN A SUCCESSFUL CSR STRATEGY



DATA PLAYING THE CENTRAL ROLE FOR RIGHTS HOLDERS

CRM IS AN ESSENTIAL TOOL FOR RIGHTS HOLDERS

Sophisticated CRM can help....

- **Optimize fan relationships**

Improved fan engagement; tailor-made offers



- **Develop income sources**

Cross- and upselling potential; identification of new target groups



- **Enhance performance**

Refine existing business processes; increased efficiency

