

ISC 2023 REVIEW

March 22-23, 2023 | Tottenham Hotspur Stadium

THE MEETING PLACE FOR
THE BUSINESS OF SPORT



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OF SPOR



WELCOME TO THE ISC 2023 ANNUAL REPORT

International Sports Convention is an events, education, and media business connecting individuals and companies in the Business of Sport.

Our annual flagship event in March is the most prestigious networking and content forum in the global sports industry. ISC is held at Tottenham Hotspur Stadium in London, UK. We stimulate meaningful conversations, provide platforms for innovative content, and connect key personnel within the field to build impactful relationships.

We are the meeting place for the business of sport.

The International Sports Convention has consistently brought together some of the sport business industry's most influential figures to provide insight and provoke debate and discussion on the subjects influencing the industry today. This traditionally includes sponsorship, broadcast/OTT, fan engagement, everything digital, integrity, sports events.

Equality, Diversity and Inclusion is also central to ISC ethos and mission and this is reflected in our programming, attendance and partnership. Sustainability is not just the future but the present and this is core to our operations, delivery and content.

ISC facilitates meaningful conversations and relationship building in order to better the industry. Networking is central with industry-leading peers throughout the event; thought leadership roundtables, innovative exhibition hall, masterclasses, drinks receptions, private dinners and all underpinned by our online technology and networking app.

With everything under one roof - ISC for the global sports industry and those connected to it, ensures its a must attend every year.

Our annual ISC report is a summary of the content and networking experience gained at the ISC 2023 edition. It allows us to share what happened, what was discussed and the many outcomes and opportunities for those in attendance. It also provides delegates and companies who did not attend, the opportunity to read a detailed summary with a view of attending the forthcoming edition.

Next year will be 15 years of The International Sports Convention and we will be providing enhanced networking and content opportunities. This also includes a special event on the Friday after The International Sports Convention at UK Parliament/House of Commons for all our partners.

Yours in Sport,

Nigel Fletcher
Chief Executive

Erin Gennard
Project Coordinator

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MOVING FOOTBALL FORWARD GLOBALLY: THE LEGAL CHALLENGES



EMILIO GARCIA SILVERO,
Chief Legal and Compliance Officer
FIFA

Emilio Garcia Silvero chose to talk about FIFA's reform of the international transfer system.

The basis of the international transfer system was designed in 2001, following on from the Bosman ruling in 1995. The aim was to encourage training of young players, protect contractual stability between players and clubs, and to protect young players (minors).

But Garcia asked: "Do the rules make sense?" The number of international transfers has ballooned 40% since 2011 from 11,882 to 20,209 in 2022.

When the regulations were created it was around 1000-2000.

"There are worrying trends and a reform of the transfer system is essential."

There have been problems with the transfer of money involved in the deals.

"Currently only 20% of money due to clubs for producing players is paid. Imagine clubs in Peru trying to get the money they are owed. It is not easy to trace this information", he said.



To improve this FIFA have created the FIFA Clearing House. The aim is to process payment related to transfers protecting the integrity of football and avoiding fraudulent activity. It was operational for the first time in the January transfer window.

Secondly, Garcia talked of reform of the regulations around agents. New regulations came into force in January. It is now mandatory to have a licence and maintain that licence every year. FIFA will set up an agent chamber to resolve disputes. Conflicts of interest must be avoided, all commissions are to be paid via the clearing house, and there will be a cap on commissions.

Thirdly, Garcia spoke about the FIFA Football tribunal, established in 2021, to resolve disputes within football. "The system works really well", Garcia said. "You don't have to go to court, but if you don't respect the decision we will impose a transfer ban. It is very effective."

" THE SYSTEM WORKS REALLY WELL, YOU DON'T HAVE TO GO TO COURT, BUT IF YOU DON'T RESPECT THE DECISION WE WILL IMPOSE A TRANSFER BAN. IT IS VERY EFFECTIVE "

- EMILIO GARCIA SILVERO



THE UNILEVER INTERVIEW



CHRIS BARRON,
General Manager Personal Care UK&I / VP Deodorants Europe
Unilever

For several years now we've been told that brands who put purpose at the heart of their business are outperforming their peers that are perceived not to. That's a view shared by Chris Barron, General Manager Personal Care UK&I and VP Deodorants Europe, during his interview on day one of the 2023 International Sports Convention.

Barron, who manages a portfolio of brands - including Lynx, Dove, Sure, and Radox - with associations to sport, outlined Unilever's position of "doing well by doing good" with a clear belief in sustainable business and making sustainable living commonplace.

"Brands with purpose deliver better business results. Purpose is at the heart of everything we at Unilever do because brands with purpose have a meaning to consumers beyond the product and its core benefits."

For Barron, the proof is in the results. "Brands like Dove, with purpose at their core, are growing faster. They also win new customers at a much higher rate," he said.

A Sure Sign of Success

Barron pointed to the success of Sure deodorant's partnerships with Manchester City and Chelsea, which extend across both men's and women's teams, as examples of how purpose can be used as a key lever within the positioning of product.

With a core focus on the message that the more active you are the more healthy you will be, Unilever were able to advertise Sure in engaging ways by utilising the club assets, such as Mason Mount, to target key audience segments. Barron also stressed that it was crucial to Sure that the relationships extended to the women's teams.



From Grassroots to Elite

Sure believes in the power of movement to transform lives and is on a mission to inspire everyone to move more. Barron explained how this insight not only drove its ads featuring elite athletes but became a powerful vehicle for a broader consumer campaign.

Leaning on research that showed fear of judgement stops one in two people from moving, Sure created the Sure Breaking Limits Programme - in partnership with Beyond Sport - to provide millions of young people with access to movement-based programmes, coaching and mentorship they need to transform their lives through the power of movement.

A content series 'Watch Me Move' depicted a group of eight content creators and athletes take to the streets and public spaces, each of whom breaks society's idealised image of the human body, ignoring the stares and quiet judgements of those around them. Participants included amputee Manchester City and England footballer Sean Jackson, fostering the link with the club at all levels of the game.

For Barron, sport remains a key activation platform for Unilever and one that it is committed to for the long term. The focus on purpose has increasingly moved sport sponsorships away from being badging exercises and Barron is convinced the storytelling potential sport offers will see brands that fuse the two elements continue to thrive.

This interview/session was moderated by Michael Inpong, Managing Director of Sport&Brands, brand strategy consultancy applied to sport.

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- CHRIS BARRON



FOOTBALL INTEGRITY BY STARLIZARD INTEGRITY SERVICES



AFFY SHEIKH,
Head of Starlizard Integrity Services
Starlizard Integrity Services

Starlizard is a UK-based company that specialises in providing sports betting advice and services to clients across the world. The company was founded in 2006 by Tony Bloom, a professional gambler turned entrepreneur. Since then, Starlizard has become one of the most respected and successful sports betting firms in the world.

Bloom, who has a Maths degree from Manchester University, has said, "I realised that applying mathematics and complex algorithms to sport allowed me to assess the probability of sporting events more accurately than the markets. Naturally, this was a significant advantage when it came to betting on sport."

This is underlined by a statement on the company's website: "We take analysis of sport into a completely different league. Through a combination of innovation and critical thought, we make the best sporting predictions in the world."

The company's expertise lies in its use of advanced data analytics and machine learning techniques to identify value in the betting markets. Starlizard employs a team of data scientists, analysts, and programmers, who work together to build predictive models and algorithms to forecast the outcome of sporting events. These models are constantly refined and updated using new data, allowing the company to provide its clients with the most up-to-date betting advice.

Starlizard builds highly specialised models that are tailored to the specific characteristics of each sport's league and competition. The company's analysts study everything from player performance data to weather patterns and injury reports, using this information to identify patterns and trends that can be exploited for profit.

In addition to its advanced data analytics capabilities, Starlizard employs a team of scouts who attend games and provide detailed reports on player performance and



other factors that may impact the outcome of a match. This analysis allows Starlizard to build a more complete picture of the factors that drive sporting events.

Additionally, a division of the company works with sports authorities to combat corruption in sport and ensure integrity of competition. Starlizard Integrity Services (SIS) works with governing bodies to identify and report suspicious behaviour and betting patterns.

Affy Sheikh, head of SIS, has said, "Starlizard Integrity Services was given its own identity with the express aim of going out there and reaching out to sports governing bodies, law enforcement agencies, public bodies, basically anyone who can do anything in the fight against match-fixing."

Starlizard is an innovative company that has disrupted the sports betting industry with its advanced data analytics. This is combined with a network of industry contacts and a commitment to sporting integrity.

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- AFFY SHEIKH



FOOTBALL INTEGRITY: NOW AND FUTURE



AFFY SHEIKH,
Head of Starlizard Integrity Services
Starlizard Integrity Services



EMILIO GARCIA SILVERO,
Chief Legal and Compliance Officer
FIFA



ALEXANDER BIELEFELD,
Director Global Policy & Strategic Relations
FIFPRO



MATTHIJS WITHAGEN,
Director of Legal and Governance Affairs
Saudi Arabia Football Federation (SAFF)

“Football without integrity doesn’t matter. How do we protect the integrity of football?” asked Affy Sheik. His company, Starlizard, has identified 1529 suspicious matches over five years.

“The match-fixers are great at identifying players’s weaknesses, particularly organised crime. Finding out what makes people vulnerable is important in combating it.” He added that few players have failed drugs tests in recent years.

Matthijs Withagen quoted statistics from Sportradar. “They have detected over 1200 suspicious matches across different sports in 92 countries across 5 different continents,” he said. “There is a growing problem in basketball.”

In football, 52% of suspicious matches came in third tier or lower matches.

Alexander Bielefeld said the issue of integrity is wider than match fixing and doping, “It is also about abuse-including online abuse, workload, head injuries.” He added, “Players

who haven’t been paid their salaries are more vulnerable to match fixing.”

Withagen agreed that non-payment of salaries is a big issue. “This is one of the main challenges. If a player doesn’t get his or her salary paid they are more vulnerable to engage in these kind of practices.”

Emilio Garcia Silvero agreed with Bielefeld that the concept of integrity needs to be expanded. “Integrity was a match-fixing issue,” he said. “Over the last 5/6 years we have seen the expansion of integrity. Doping, racism and sexual harassment are also part of the integrity of the game.” He continued: “Integrity also means multiple ownership of clubs competing in the same competitions.”

Withagen said that SAFF have produced an app which anyone can use to report suspicions around integrity. He stressed that education of players, officials and staff was essential to protect the integrity of the game. This included working with players on the influence of social media.



Bielefeld said that FIFPRO are working with FIFA on player work load. “There is training, matches, travel, international matches-players don’t get enough rest,” he said. “No-one really cares about their career paths. We need safeguards to protect off season periods for players in particular.”

Sheik returned to the topic of match-fixing. “The idea that you can contact a footballer through social media...if match-fixers can get hold of former players they tend to be more convincing.”

“We have heard from retired match-fixers how easy it is... that no-one has turned down the money on offer.”

“There have been a number of high-profile intentional yellow cards lately...a referee insisting on a goal being scored.”

As for the future, Garcia Silvero said: “There are two vital points going forward. Sexual harassment and financial integrity. We are dealing with sexual harassment across the world. The second point is financial transparency within the international transfer of players.”

Sheik said: “Regarding match-fixing, I’d like to see more, and better, investigations. More witnesses. An international football integrity agency? Addressing the issues that lead players to match-fix is vital.”

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THERE HAVE BEEN A NUMBER OF HIGH-PROFILE INTENTIONAL YELLOW CARDS LATELY...A REFEREE INSISTING ON A GOAL BEING SCORED ”

- AFFY SHEIKH

HOSTING MAJOR INTERNATIONAL EVENTS IN NEW ZEALAND



KYLIE HAWKER-GREEN,
Manager
New Zealand Major Events

A presentation from New Zealand Major Events began with words of welcome, in Maori, to the session, and of thanks, in English, for the hospitality received from the International Sports Convention and its London audience.

Cultural exchange flows through the events strategy in Aotearoa New Zealand and that can deliver some unexpected ironies. ISC delegates received gifts of chocolate – a gesture the organisation also extended to its hosts on a recent visit to Switzerland.

As manager Kylie Hawker-Green explained, New Zealand Major Events is a government agency working out of the country's Ministry of Business, Innovation and Employment.

Its responsibilities lie across four key areas: prospecting, where it identifies potential event opportunities and the cities that could host them; dispensation of a major events fund to support organising bodies from planning to delivery and evaluation; coordination between 26 different branches of government and the management of an Act of Parliament for major events; and the operation of a specialised major events team where bespoke capabilities are required.

But it is the values by which major events in New Zealand are run that are just as important. Developed during a period of review in the Covid-enforced shutdown, these draw on local culture and tradition to project the best of the nation overseas while sustaining a meaningful impact at home.

Manaaki refers to warm welcomes and fostering relationships based on respect, care and reciprocity. Later this year, New Zealand will co-host the Fifa Women's World Cup with Australia. When it staged the draw for the tournament in October, it treated over 400 delegates from Fifa and the 32 competing teams to a 45-minute reception, with cultural leaders offering tributes.

At the tournament itself, the opening ceremony in Auckland and the closing ceremony in Sydney will both reflect aspects of both Indigenous Aboriginal and Maori culture.

Tiaki is the drive to care for people, places and the future of the planet. For Hawker-Green, this is best encapsulated in a partnership with SailGP, a global inshore sailing league with its manufacturing base in Auckland.

Working with rights holders, New Zealand Major Events aims to deliver cleaner, more environmentally responsible sporting occasions and by that measure, SailGP's 'climate positive' goals are perfectly aligned. The league takes an open-source approach to competition data and also monitors its environmental impact across every available metric, rewarding the best-performing team at the end of the year with a donation to the climate charity of their choice.

Pono means acting with integrity, honesty and transparency. Hawker-Green illustrated this with a video of rugby player Ruby Tui leading fans in a celebration of New Zealand's victory in last year's Women's Rugby World Cup – making the moment about the nation, not herself and her teammates.

Across 2022 and 2023, New Zealand has hosted or will host three of the biggest women's team sports events on the planet, having also juggled pandemic health protocols to put on the ICC Women's Cricket World Cup last March and April. But those events were delivered with an honest understanding of the need to keep driving women's sport further.

There has been a "massive uptake in reporting of women's sport in mainstream media" – up from 7 per cent to 40 per cent of coverage in New Zealand – while legacy investment will aim to "create opportunities for those sports in particular [for women and girls] to play the game their way".



The social focus of the major events strategy will begin shifting from female sport to engaging young people in underrepresented communities. And the fourth value pillar for New Zealand Major Events, fittingly enough, is Potikitanga: the curious, ingenious and adventurous spirit of the youngest child.

The country's stunning landscapes have long made it a beacon for action sports fans. This is exemplified by a multi-year partnership with Crankworx, a North American-based downhill mountain biking event with spectacular action and youth-focused brand activations.

Bringing elements of those four values into every event, Hawker-Green says, helps to create "something magical" but it also expresses how the country is harnessing its potential while taking inspiration from its past.

Hawker-Green brought her presentation towards its close with a New Zealand Tourism video that told the story of modern New Zealand, showing off not just its astounding natural beauty and tradition but its ability to 'innovate with care'.

Creating events in that spirit, with a firm grasp of their economic and social contribution, is at the core of the Major Events New Zealand mission.

" MASSIVE UPTAKE IN REPORTING OF WOMEN'S SPORT IN MAINSTREAM MEDIA.

CREATE OPPORTUNITIES FOR THOSE SPORTS IN PARTICULAR [FOR WOMEN AND GIRLS] TO PLAY THE GAME THEIR WAY "

- KYLIE HAWKER-GREEN

DIGITAL AND TECHNOLOGY DISRUPTION



MICHAEL COLE,
Chief Technology Officer
European Tour Group



BILL JINKS,
Technology Director
ELTC/Wimbledon Championships



VINAYAK SHRIVASTAV,
Chief Executive Officer
Magnifi



SANJEEV KATWA,
Technology Director
Tottenham Hotspur Football Club

How do you harness cutting edge technology to bring traditional events like the Wimbledon tennis tournament, professional golf or professional football to a modern audience, and what will be the next steps? The panelists outlined the enormous changes taking place now, and in the future.

Michael Cole said: "Technology is having a huge disruption. Five years ago the smartphone was frowned on at golf tournaments. Now, this is the only device I want people to bring. This is your cash, this is your ticket, this is your everything."

Sanjeev Katwa believes Tottenham Hotspur have been pace-setters in this field: "I think we disrupted things early on. When we opened up the new stadium. In April 2019, we thought the mobile device was the only thing you needed. Cashless stadium, wifi, digital ticketing. We helped to set the bar quite high. Others are now following." He continued, "Now it is about taking better decisions about how we operate in our venue. We know

queue times, dwell times, how much beer is sold, how many rocket salads are left at the end."

Bill Jinks outlined his major concern: "We have to put new tech on a 101 year old stadium, Centre Court. The disruption is all about data. The players are expecting more. We now have ball-tracking for line calling, for example. The demands are coming from all sides, players, fans, partners. How do you package all that up and it still looks like Wimbledon?"

Cole's issues were different: "We don't have a stadium! We have to construct that temporary stadium week in, week out. Our biggest challenge is how we can get that consistency of delivery across all our territories and continents as technology plays a bigger and bigger role in sport itself. We are 100% cloud-based."

And for sports fans who can't get to the stadium or venue for the event, the changes are likely to be even more dramatic.



Shrivastav said: "We are trying to cater for the people who can't go to the stadium. We are creating personalised highlights for specific players. Personalisation is important for how you consume sport digitally. I can do that using AI. We used to enjoy watching five minute highlights...now it's come down to 20 seconds."

The developments in technology are likely to lead to a whole new way for sports fans to watch sport, according to Shrivastav: "Virtually, actually sitting in a seat, consuming a match as a live experience. They want to feel the crowd noise. How much of the live sports is going to be consumed virtually, when you don't really need to be in the stadium for the live experience."

And for Katwa and Tottenham: "The virtual stadium is interesting. We have to look at the demographic of our fans. They consume content in a different way. Having the same content shown in different ways. TikTok, Snapchat, Instagram and everything else. I'm interested in blockchain and football analytics."

Shrivastav: "The way AI has changed is about engagement. Short video content, personalised content. AI has to be there to create volumes. Can I get my content quickly, when I want it?"

Cole also looked ahead: "Automation is going to be huge. In broadcasting-we own European Tour Productions. At each golf event there are 15 production trucks, 200-400 personnel, 100 cameras on the course.. How can we do more remote production? Sending 200-400 people around the world is not good for us, for them, or the planet. Our graphics are already produced in New Zealand."

Cole added, "We want the Ryder Cup to be pioneering for technology."

And there are developments away from the live sporting action, Jinks said: "We looked at digital collectibles. Digital artworks that were unique. There is now a secondary market for those out there. What is sustainable in that space? We have our eyes peeled for the next opportunity in that space."

" TECHNOLOGY IS HAVING A HUGE DISRUPTION. FIVE YEARS AGO THE SMARTPHONE WAS FROWNED ON AT GOLF TOURNAMENTS. NOW, THIS IS THE ONLY DEVICE I WANT PEOPLE TO BRING. THIS IS YOUR CASH, THIS IS YOUR TICKET, THIS IS YOUR EVERYTHING "

- MICHAEL COLE

CELEBRATING THE LONGEST PARTNERSHIP IN PREMIER LEAGUE HISTORY...PROBABLY



LOUISE BACH,
Global Sponsorship Director
Carlsberg

Day one of the International Sports Convention welcomed Carlsberg's Global Sponsorship Director, Louise Bach, to the main stage for a look back on the beer brand's 30-year association with Liverpool FC, the longest of its kind in the amongst Premier League clubs.

Carlsberg started sponsoring sport with the Danish national team in 1978 and has been attempting to overcome consumer cynicism ever since using sport as a key vehicle.

Bach outlined how for Carlsberg brand saliency and recognition is a key target: "It's all about the magic moments, big and small. Putting the brand at heart of the moment, subconsciously knowing that fans don't really care if we are there or not."

Carlsberg's approach to sponsorship has three key focuses - loyalty, passion and affinity - and for Bach sport offers an unrivalled opportunity to meet these objectives.

"Fans will never change their football team, so loyalty is a given. Passion is inherent in sport whether at the grassroots level or elite - the reactions to success and

failure are equally powerful. And by being at the heart of the action we are able to generate incredible affinity with fans who are our key consumers."

The Danish beer brand was founded by J.C. Jacobsen in 1847, rooted in a philosophy of constant improvement. The partnership with Liverpool is rooted in this shared value, of striving to be the best you can be. This has become a clear focus of more recent activations between the partners.

Bach admitted: "Carlsberg and Liverpool haven't always got their activations right and a review that coincided with the 25-year anniversary of the partnership identified the need for more authenticity in the partnership with credible activation."

For that anniversary Carlsberg created a special beer using hops that have been cultivated using pictures and sounds from Liverpool matches, and soil from Anfield, by scientists at the Carlsberg Research Laboratory. They created 50,000 bottles and sent them to supporter's clubs and fans around the world.



"We knew we had done something right as we've managed to talk about hops and people were starting to associate the beer directly to Liverpool," said Bach.

For Carlsberg, the measurements of success have changed over the years, but the end goal is to "sell beer and ensure our brand is in hand no matter where you are."

More recently Bach's team look to social media for signals of success as that provides direct feedback from the fans, their target group.

"We believe great creativity drives sales, but at the end of the day fans buy the product. One goal of ours now is to receive comments on social media from fans of a rival team to say something you did was quite cool. That's where you know your campaigns and ideas are really working."

Bach concluded that a key priority for the next phase of Carlsberg's partnership with Liverpool is a greater focus on the women's game.

"We are still on a journey and our DNA means we are always looking to improve. We've been late to the game with Women's football. We are trying to support them, and this is our focus for the next five years. And not because this is the right thing to do but because it's the right thing for us to do. This needs to be accelerated and that our aim moving forwards, to participate at the same level as we do in the men's game."

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- LOUISE BACH



LIVE SPORTS STREAMING AT SCALE



THOMAS DECIEUX,
Head of Sport
EMEA & APAC, Harmonic

The massive growth in live streaming over the past decade has already transformed sports media. Yet there is little sign that the pace of that change, or the challenges it creates, will be letting up any time soon.

Thomas Decieux, Head of Sport for EMEA & APAC at Harmonic, noted early in his ISC presentation that the company's clients keep setting new streaming records.

In February, Super Bowl LVII became the most streamed event in the history of Fox Sports. Last year, Beijing 2022 was the most streamed Winter Olympics to date in the US, with 4.2 billion streaming minutes representing a 78% leap for NBC compared with PyeongChang 2022.

Harmonic helps its partners to stream over 3,000 live events a month, using cloud-based technologies that are "very elastic" and "allow us to build resiliency".

At the heart of Harmonic's offer is VOS360, a full-service, end-to-end streaming infrastructure product focused on video processing and delivery. This operates globally around the clock, which is crucial to delivering at scale.

For Major League Baseball games in the US, streaming platforms receive 1,500 requests to join per second – or around 100,000 per minute. For an NFL game, that figure can jump to 4,000 requests per second.

With 90% of US households streaming at high quality, that puts a huge premium on stability. "It's about the basics and getting the basics right," says Decieux. "The user will pay attention to that."

Guaranteeing that reliability is "not just about the technology, it also requires a lot of preparation". In this NFL example, Harmonic consulted with the client and prepared the system for 10,000 joins per second.

The Fifa World Cup brought home the breadth of challenges that exist in this sector. Harmonic had 15 VOS360 customers covering the tournament and deployed systems across nine cloud regions.

That event brings its own unique pressures. Four years is "an eternity" in digital media terms, with audience expectations moving on dramatically in between. At the same time, new innovations can be brought into plans just months before kick-off, while every day can have a different storytelling prerogative.

Ultra high-definition (UHD) streaming, Dolby Atmos and HDR were also adopted much more widely in this World Cup than any previous edition, placing further strain on cloud networks. To address this, Harmonic deployed geo-redundancy, where mission-critical components



or infrastructure are spread across multiple locations to compensate for any outage, and source redundancy, where video is ingested from more than one source in case the primary one goes down.

This is an era in which several key lessons have been learned. Good planning and preparation are vital, resiliency is paramount, and quality matters when "fans will share their experiences on social media".

"For us," Decieux says, "it means constant investment in how we compress the video and how we optimise for quality."

Innovation must scale as well, particularly with partners reliant on ad tech that has to reach their audiences effectively. Harmonic handles around 10 million ad insertions into content every day.

The company also emphasises the importance of tailored DevOps services for its clients, some of whom may need dedicated features or additional support on setup and testing. Streaming platforms, increasingly, are having to think beyond the live event.

One such client is RallyTV – a new global home for rally motorsports which operates as a 24/7 channel. Managing that programming, distribution and video library access is another function of VOS360.

With FAST channels – free, ad-supported streaming television – becoming an increasingly influential model in the sports industry, those technical capabilities are now fundamental. There is an expectation that services will be able to mix VOD and linear consumption, leveraging catalogues and live events while monetising streams through the effective integration of advertising.

It is a space that is constantly evolving to meet needs that may only just have been identified.

" FANS WILL SHARE THEIR EXPERIENCES ON SOCIAL MEDIA.

FOR US, IT MEANS CONSTANT INVESTMENT IN HOW WE COMPRESS THE VIDEO AND HOW WE OPTIMISE FOR QUALITY "

- THOMAS DECIEUX



CHILDREN'S RIGHTS AND SPORT



LIZ TWYFORD,
Sports Programmes Specialist
UNICEF

Liz Twyford explained her role is focussed on sport and children's rights for UNICEF, the world's largest charity working for children's rights. UNICEF coordinates international safeguards in sports. She highlighted the "three pillars" of children's rights in sport.

1) The rights of children taking part in sport.

Twyford recalled recent high profile safeguarding failures in football, women's basketball and gymnastics. She outlined three kinds of rights: protection rights, provision rights and participation rights. She asked, "How do we make sure we hear from children in sport?" She emphasised the importance of putting the child first: "We coach the child not the sport."

2) The rights of children around sport.

"Children can be impacted by major sporting events in negative ways," Twyford said. It could be big events where there is construction and families are forced to relocate. It may be extensive street clearances before the big sporting event. Children in families of workers in the sports supply chain can be affected-the children left behind when there is non-payment of wages for example.

Twyford emphasised how the concept of sustainability around events has developed considerably, particularly since the London Olympic Games of 2012. "There is now much more focus on social and economic sustainability."



3) Children's rights through sport.

Twyford said, "Sport is an incredible platform for change." It can bring children together: "Teamwork, cooperation." She spoke about the power of sport as a communication platform and referenced a successful campaign using the opening ceremony of last year's Commonwealth Games.

"How do we make sure children are safe? See children as human rights holders. Really listen to children. Sport should be about fun, enjoyment, team-mates."

" HOW DO WE MAKE SURE CHILDREN ARE SAFE? SEE CHILDREN AS HUMAN RIGHTS HOLDERS. REALLY LISTEN TO CHILDREN. SPORT SHOULD BE ABOUT FUN, ENJOYMENT, TEAM-MATES "

- LIZ TWYFORD

BNP PARIBAS BANK POLSKA AND TENNIS: A NATIONAL CASE STUDY



DAREK MACIOLEK,
Chief Marketing Officer
BNP Paribas Bank Polska S.A

This year, BNP Paribas celebrates 50 years as a supporter of tennis, with the global bank aligning to the sport through the values of fair play, reactivity and performance. Following a request by the French Tennis Federation to finance the construction of the centre court box seats at Roland-Garros in 1973, the Group is now a major partner of the sport globally through a unique commitment that applies to all levels of the game.

On the first day at the 2023 International Sports Convention, Darek Maciolek, Chief Marketing Officer at BNP Paribas Bank Polska SA explained the enduring strength of the relationship at both a global and local level.

BNP Paribas' historical commitment applies to all forms of tennis: singles, doubles, wheelchair tennis (World Team Cup, French Riviera Open, French Championships), team, family (BNP Paribas Family Trophy), amateur, university (BNP Paribas Master'U); from learning to the largest professional tournaments.

Roland-Garros was just the first in a long series of partnerships, developed with tournaments and

professional competitions around the world: BNP Paribas as title sponsor of the Billie Jean King Cup, sponsor of three ATP Masters 1000 (BNP Paribas Open in Indian Wells, Monte Carlo Rolex Masters, BNL Italian Open in Rome), Open 13 Provence (Marseille), Lyon Open Parc, Moselle Open (in Metz, France), BGL BNP Paribas Luxembourg Open.

The Group also promotes corporate sport through its employee tournament, the 'We Are Tennis Cup', which has become one of the world's leading corporate sporting events, involving over 3,000 employees each year.

At a local level, reflecting on the Polish market, where Maciolek manages the marketing activities, the rise of Polish players to the top of the game has coincided with a boom in interest.

"With Iga Świątek now a three-time major singles champion and the #1 ranked player in the world, plus Hubert, tennis is booming in Poland and the relationship between the sport and BNP Paribas has never been stronger."



In 2021, to strengthen the relationship further still, BNP Paribas took the title sponsorship of the Poland Open tournament - the only WTA 250 top tier event hosted annually in the country - which welcomes top ranked players from Poland and around the world.

As Maciolek says: "The results speak for themselves with research showing that BNP Paribas' brand recognition in the country has climbed almost doubled in the last five years from 14% in 2017 to 29% in 2022."

It's not just the elite level where BNP Paribas shows its support for the game. Sponsorship of tennis events also has a dimension of social involvement.

In 2015, as part of this activity, the Group initiated Aces from the Heart - an initiative aimed at financing social and self-help projects (environment, gender equality, youth inclusion) or projects aimed at improving living conditions in the neonatology departments of hospitals near tournaments. To date, nearly €600,000 has been transferred to the various projects supported by the scheme.

In Poland, the Kids for Rackets programme launched in 2016 promoting physical activity among children, their parents and teachers. The main goal of the project was to popularise tennis and, helped by the appointment of Iga Świątek as an ambassador, in the first four years more than 10,000 participants took part.

Maciolek explains that tennis provides BNP Paribas with a truly global platform which included 496m viewers in 2021. For its sponsorship programmes, BNP receives 31 minutes of visibility for each hour of a tournament and 75,000 hours exposure per year.

The numbers are impressive and there is no question one of sports longest running partnerships is set to continue for many more decades.

" THE RESULTS SPEAK FOR THEMSELVES WITH RESEARCH SHOWING THAT BNP PARIBAS' BRAND RECOGNITION IN THE COUNTRY HAS CLIMBED ALMOST DOUBLED IN THE LAST FIVE YEARS FROM 14% IN 2017 TO 29% IN 2022 "

- DAREK MACIOLEK



OPPORTUNITIES AND CHALLENGES IN THE BROADCAST AND MEDIA SECTOR



ANNA CHANDUVI,
Lead, Sports and Entertainment partnerships
Meta



ITAI EPSTEIN,
Head of EMEA & China
WSC Sports



PIERRE-OLIVIER BOUCHÉ,
Media Director / Chief Content Officer
Tottenham Hotspur FC

WSC Sports is an innovative company that uses artificial intelligence (AI) to create personalised sports video content. The company was founded in 2011 in Tel Aviv, Israel, and has since grown to become a global leader in the field of sports video technology.

WSC Sports say they work with over 300 sports organisations, including the NBA, NFL, UEFA, and the Olympic Channel.

WSC Sports' technology is based on an AI platform that can automatically generate sports video content in real-time. The platform uses algorithms to analyse live sports broadcasts, identifying key moments such as goals, assists, and highlights. It then uses this data to create personalised videos that are tailored to the preferences of individual viewers.

The platform is highly versatile and can be used in a variety of ways. For example, it can be used to create highlight reels of individual players, team highlights, or entire games. It can also be used to generate social media content, such as short clips that can be shared on platforms like Twitter and Instagram.

The platform can be tailored to the specific needs of individual clients, allowing them to create content that reflects their brand identity and messaging. This is valuable for sports teams and leagues, who need to maintain a consistent brand image across all of their communications channels.

WSC Sports has received testimonials from many in the world of sport. Bob Carney, Senior Vice-President, Digital and Social Content at the National Basketball Association (NBA) has said, "WSC Sports enables us to create unique content for every single digital platform that we touch, globally. And in the past season that content received a record 1 billion views on YouTube and 6.55 billion in-feed views on Instagram."

One of the key advantages of WSC Sports' technology is its ability to generate content quickly and efficiently. The platform can generate personalised videos in real-time, which means that fans can get access to highlights and other content almost immediately after the event has taken place. This is particularly important as fans expect to be able to access content quickly and easily.



In addition to its core technology platform, WSC Sports also offers a range of other services to its clients. These include data analysis and reporting, social media strategy development, and content distribution. The company has a team of experienced sports industry professionals who work closely with clients to develop customised solutions that meet their specific needs.

WSC Sports is a highly innovative company in the sports video technology industry. Its AI-based platform has the potential to transform the way that sports content is created, distributed, and consumed, and to provide fans with a more personalised and engaging experience.

" WSC SPORTS ENABLES US TO CREATE UNIQUE CONTENT FOR EVERY SINGLE DIGITAL PLATFORM THAT WE TOUCH, GLOBALLY. AND IN THE PAST SEASON THAT CONTENT RECEIVED A RECORD 1 BILLION VIEWS ON YOUTUBE AND 6.55 BILLION IN-FEED VIEWS ON INSTAGRAM. "

- BOB CARNEY

WHY WE SPONSOR AND WHAT WE ARE LOOKING FOR?



JEM MAIDMENT,
Chief Marketing Officer
Utilita Energy



MICHAEL COTTRELL,
Product, Partnership and International Marketing Director
Octopus Energy

Football still represents incredible value as a sponsorship opportunity according to CMOs from two leading energy companies.

Jem Maidment, Chief Marketing Officer at Utilita Energy, and Michael Cottrell, Product, Partnership and International Marketing Director at Octopus Energy, shared the stage for a panel discussion looking at the properties they sponsor and drivers behind those choices with football playing a key role for both brands.

As Maidment states: "Football is still a cheap way to build a brand. I wanted to use it as a proof point to acquire customers in specific geographical locations, so it all started when we became the presenting partner for Scottish League Cup and it was hugely successful."

From that starting point, Utilita, who launched in 2003 and count 800,000 customers in the UK, has established itself as a hugely recognisable brand in British football, partnering with more than 25 clubs.

Utilita has supplied power to several stadiums – including fellow Premier League venues Selhurst Park, home of Crystal Palace, and Villa Park, Aston Villa's historic stadium and secured arena naming rights in Newcastle, Birmingham and Sheffield, seeing sport and music as the two biggest cultural touchpoints.

Utilita has also launched an environmental movement - Football Rebooted - aimed at rehoming at least one million pairs of quality football boots across the UK, to stop them ending up in landfill, as well as 136,000 tonnes of carbon – the same as taking 7,000 cars off the road for a year or turning the energy off in one million medium-sized houses for a week.

Sustainable energy is the specialist subject of British renewable energy group Octopus Energy who launched as a challenger brand in 2016 and now counts 5 million customers in the UK and is branching out internationally with offices in Milan, Valencia and Munich.



One of Octopus' earliest and longest-standing partners is Arsenal FC and it's a relationship that started when the club approached Octopus as they were proactively seeking a green energy supplier.

It's an association that has had a huge impact on Octopus' growth, as Michael Cottrell explains: "The partnership with Arsenal was inadvertently a springboard into the B2B energy market, they were our first client, and this has now grown to more than 30,000. The halo effect of the Arsenal association is hard to quantify. Even today, as we grow in other markets, the global recognition that Arsenal brings is invaluable."

Whilst Octopus achieved a huge boost from being affiliated to Arsenal, it isn't always a direct driver of acquisition. "We did some activations at The Emirates Stadium, but it wasn't a natural fit - it was clear that football fans did not want to talk about their energy provider at the game!," said Cottrell.

The brand did, however, gain cut through around issues of sustainability. "When the club speaks on issues directly, which Arsenal do regularly, their fans tend to listen," Cottrell continued.

As both energy firms target long-term sustainable growth, it's clear that football, and sport more broadly, will remain strategically important as a way to build their brands and customer bases.

" FOOTBALL IS STILL A CHEAP WAY TO BUILD A BRAND. I WANTED TO USE IT AS A PROOF POINT TO ACQUIRE CUSTOMERS IN SPECIFIC GEOGRAPHICAL LOCATIONS, SO IT ALL STARTED WHEN WE BECAME THE PRESENTING PARTNER FOR SCOTTISH LEAGUE CUP AND IT WAS HUGE SUCCESSFUL "

- JEM MAIDMENT



RISK AND OPPORTUNITIES WITH METAVERSE APPLICATIONS AND NFTS



JOERN SCHLIMM,
Senior Manager, Audit Risk and Advisory
FIFA



HANNES GLAESER,
Head of Digital & Customer Experience
RB Leipzig



FELIX VETTER,
Managing Director
Ankura

The panel members kicked off the session by explaining how they see the metaverse and NFTs, and exactly what they are.

Felix Vetter said "NFTs provide virtual real estate for the metaverse. The metaverse provides new engagement for how we watch sport. Virtual reality is coming in. NFTs are more associated with a new product often sold with fan engagement."

Joern Schlimm talked about NFTs: "NFTs are digital collectibles. It has an identifier that means it cannot be copied." He outlined how FIFA are engaging with the new technology. "We've experimented a little bit. We have offered videos on our NFT platform."

"There are a lot of risks involved but also a lot of opportunities. Fan engagement comes with revenue opportunity. Every two years we have a big tournament, so we have to keep fans engaged between the tournaments. We have a lot of down time. We are hoping NFTs and the metaverse can keep us engaged with fans between these tournaments."

Hannes Glaeser: "We try to really put the fans really at the centre of everything that we do. The website and the apps for now, but we are looking into the future, the metaverse and NFTs are super-interesting for us."

Vetter pointed out that American sports organisations are leading the way at the moment: "In the metaverse, there are examples in the NBA. The Brooklyn Nets broadcast live events in a Virtual Reality environment. It allows the person watching to consume the game from all angles. If they want to attend the Virtual event, you can sell tickets for that. If they want to wear a Virtual jersey, you may be able to sell that."

He continued, "NFTs are frequently used for fan engagement. We've seen in the NBA sales of collectible items."

The panel members discussed the potential financial benefits and risks of owning NFTs, where the value can rise and fall dramatically.

Schlimm said: "There is an emotional moment to owning a video of a moment, but there is also a financial element to it."

Vetter pointed out some pitfalls: "Most people are buying it as a speculative asset. You run the risk of alienating your fans. Effectively you are promoting an unregulated product to your fans."

Schlimm compared NFTs to a Picasso painting, where there is just one original but thousands of people have copies around the world. "Let's say you own the original, say a video clip of a Messi goal, but there are thousands of copies, then the NFT will rise in value."

But NFTs are not universally welcomed. Glaeser said: "Fans in Germany are critical of commercialisation. We have very emotional discussions."

Schlimm "You have to look at your target audience. It is not just geographical or age groups."

" THERE ARE A LOT OF RISKS INVOLVED BUT ALSO A LOT OF OPPORTUNITIES. FAN ENGAGEMENT COMES WITH REVENUE OPPORTUNITY. EVERY TWO YEARS WE HAVE A BIG TOURNAMENT, SO WE HAVE TO KEEP FANS ENGAGED BETWEEN THE TOURNAMENTS. WE HAVE A LOT OF DOWN TIME. WE ARE HOPING NFTS AND THE METAVERSE CAN KEEP US ENGAGED WITH FANS BETWEEN THESE TOURNAMENTS "

- JOERN SCHLIMM



DRIVING SOCIAL IMPACT THROUGH THE POWER OF SPORT



HENRY UTKU,
Senior Director of Basketball Operations, Europe and Middle East
National Basketball Association (NBA)



SHAHAB UDDIN,
Director of Legal and Olympic Relations
British Olympic Association (BOA)



ANNA SCOTT-MARSHALL,
Director of Communications and Social Impact
British Paralympic Association (BPA)



KATHRYN MCCOLL,
Director of Marketing, Strategy and Impact
EVERFI

The wider economic and social climate is driving an increased strategic focus on social impact programmes, that's the message from a series of social experts who spoke at the International Sports Convention today.

Kathryn McColl, Director of Marketing, Strategy and Impact at EVERFI led the thought-provoking discussion that unpicked how a series of sports organisations are tackling social impact, which has come under increasing strategic scrutiny post-covid.

As Shahab Uddin, Director of Legal and Olympic Relations at the BOA, said: "Our previous focus was on one-off events with no dedicated long-term approach. We have just launched a new strategy focused on physical and mental wellbeing as it was clear to us in a post-covid that this is where we can make the most impact."

Recent research from Nielsen shows that the number of sports fans whose interest in brands that have strong social values has increased by 75% from pre to post covid pandemic. In a similar vein, 69% of 18–24-year-olds are now classed as brand-driven buyers whose purchasing is guided by the purpose and social.

The brand and commercial benefits of social impact programmes have long been key drivers of activity. Now, with issues surrounding physical activity, mental health, education and environmental wellbeing on the rise, many sport organisations have re-appraised their approach and are in a unique position to generate change.

The NBA is a good example and Henry Utku, Senior Director of Basketball Operations, Europe and Middle East for the company explained that a lot of the league's work is now "dictated by wider cultural forces," such as the Black Lives Matters movement.



The global outpouring following the murder of George Floyd, sparked the formation of the NBA Foundation which focuses on driving economic opportunity and empowerment in the Black community.

The role of players and ambassadors has also become increasingly important given the power and reach of their platforms and their relatability. Uddin asserts that "Athletes provide an authentic voice on these subjects and have become more comfortable talking about such issues."

The NBA has taken this a step further by launching an off-court schools programme - NBA in the Classroom - in collaboration with EVERFI that provides downloadable, flexible, curriculum-linked teaching resources for use in PE, PSHE/Health and Wellbeing, careers and/or enrichment and personal development.

The NBA used players to deliver key messages within the programme knowing that pupils would be far more engaged with a video featuring LeBron James than a corporate voice. In the first year over 100,000 pupils have taken part.

Sponsors are also increasingly invested in the delivery of impactful campaigns and programmes. Anna Scott-Marshall, Director of Communications & Social Impact at the British Paralympic Association, referenced the organisation's latest campaign with Toyota.

"The Every Body Moves initiative empowers disabled people to become active in a way that is right for them. A key facet of this campaign is the modernised method of delivery which is crucial in engaging young people," Scott-Marshall said.

As more sponsors turn their attention to social impact as a way to activate their partnerships, the scrutiny on ROI has increased and the panellists all referenced the need to increase focus on measurement and evaluation.

Scott-Marshall said: "We are at the start of the journey when it comes to measuring success. Funders and partners help push us to be more accurate with our targets beyond pure participation. We now look at more metrics, as opposed to the bigger the number the better. It's also important to remember that success doesn't have to look like a big number."

Shahab Uddin agreed and asserted that "making sure measurement is embedded to track actual outcomes" was a key priority moving forwards. "Sponsors are now demanding hard data as to how a project or programme is moving the dial and changing behaviours."

The movement of traffic is clear: sport, its sponsors and its athletes have a huge role to play in driving social impact and that role has never been more critical.

" WE ARE AT THE START OF THE JOURNEY WHEN IT COMES TO MEASURING SUCCESS. FUNDERS AND PARTNERS HELP PUSH US TO BE MORE ACCURATE WITH OUR TARGETS BEYOND PURE PARTICIPATION. WE NOW LOOK AT MORE METRICS, AS OPPOSED TO THE BIGGER THE NUMBER THE BETTER. IT'S ALSO IMPORTANT TO REMEMBER THAT SUCCESS DOESN'T HAVE TO LOOK LIKE A BIG NUMBER "

- ANNA SCOTT-MARSHALL

BACKLIGHT STREAMING MASTERCLASS



MATT LOREILLE,
CMO
Backlight Streaming

The Fifa World Cup showcased a step change in the possibilities of digital media presentation and storytelling.

That was the theme of the masterclass delivered to ISC by Matt Loreille, Chief Marketing Officer of Backlight Streaming – a new brand created around a year ago, alongside Backlight Creative, after the acquisition of five companies. Its mission is to connect video content with viewers of all kinds, on every device, and Loreille put the spotlight on broadcasters operating during last year's tournament in Qatar to demonstrate the level of innovation that is now out there.

These innovations, he said, will have been developed to serve one or more of four different purposes: developing speed and reach of content, enhancing the viewer experience, stimulating engagement and improving monetisation outcomes.

Highlights and match feeds

The production of near-live clips, extracted automatically from match footage using AI solutions, has been an especially significant development. Their adoption is now widespread: Loreille was surprised to discover Backlight customers asking for automated solutions during the World Cup, despite the fact that with few matches played concurrently, traditional editing teams would have been available for most games.

Automation, however, enables the efficiency that unlocks new storytelling capabilities. Bespoke highlights packages were created to a range of tastes and needs; metadata and pre-roll advertising could be inserted without additional intervention, while broadcasters could create multiple versions by language, length, or a focus on individual players.

Distribution workflows are also shortened in this way, with automated web stories delivered straight to platforms like Google OneBox.

Growing reach through distribution

The value of producing content tailored to each platform was also evident during the World Cup.

Social platforms allow broadcasters to connect in moments of high emotion but broadcasters also showed novel ways of tailoring content for those channels.

The production of mobile-first vertical video – popular on TikTok and Instagram Stories – has moved closer to the industry standard but over the course of the World Cup, companies like Telemundo found they could generate further engagement by dividing the screen into zones – showing something closer to the conventional TV aspect ratio alongside an alternate angle of a tactical view or a close-up of the coaching staff, for example.

Meanwhile, brands found that developing content ideas that were closer to the spirit of each platform – producing advertising as entertainment – improved the performance of their campaigns.

At the same time, Backlight Streaming has been working with its partners to emphasise the quality of social-first video, applying broadcast-level expectations by ensuring, for instance, that scoreboxes are not cropped from a mobile screen.

Back on the big screen, FAST channels – free ad-supported streaming television – are set to become an important part of many companies' strategies. Fox Sports loaded up its games on its FAST outlet, Tubi, so that fans could watch at more convenient times in the US. The channel was still running that looped match footage weeks after the tournament finished, providing ongoing advertising opportunities.

The same broadcaster, along with Telemundo, also experimented with free teaser offers for its paid OTT service. Fans were given the chance to watch up to 60 minutes of live action, allowing them to trial the product

before deciding on a subscription. In the MENA region, beIN Sports made the final available for free as part of a day-long, geo-blocked livestream.

Interactivity and engagement

As the fundamentals of mobile distribution become easier to handle, fans are coming to expect differentiated viewing experiences. The World Cup was an opportunity for media companies to push the envelope in that respect.

Multi-angle video has improved in terms of reliability and flexibility, and different companies were ready to take advantage in their own way. In Switzerland, SRG SSR split the screen to show a pitch map below the action. India's Viacom18 introduced the JioCinema interface, a more intuitive means of controlling the action through a time wheel and other joypad-style commands.

In Colombia, Caracol used SportBuff's technology to integrate sponsor messaging through polls and other interactive on-screen elements that added another level of play.

Several broadcasters also introduced more dynamic and enticing push notifications on mobile, tied more closely to the story of a match. These optimisations, Loreille noted, could only be effective once the entire workflow had been built to allow such flexibility.

The next generation of digital experiences are ready to emerge and in Hong Kong, Now TV provided the most telling glimpse. It rolled out features like online watch parties and a comprehensive augmented reality offering. Through their mobile screens, users could see real-time graphical overlays of in-game tactics and even perspectival images of players projected on to their surrounding environment.

The age of standard replications of the TV feed in digital streaming is nearing its end. From here, there are many exciting paths to follow.



THE ONE-ONE INTERVIEW WITH SAUDI ARABIA FOOTBALL FEDERATION



IBRAHIM ALKABBAA,
Deputy Secretary General
Saudi Arabia Football

Ibrahim Alkabbaa outlined the ambitious vision for football in Saudi Arabia. This encompasses everything from increasing children's participation in the sport, to development of the men's Saudi Pro League and women's football - all the way up to staging the FIFA World Cup.

He said: "Football is the number one sport in Saudi Arabia. It is part of our roots, part of our vision."

He emphasised how inspired he had been by last year's men's World Cup, and by the shock victory of the Saudi national team over the eventual champions, Argentina, in their first Group game.

"Watching these international tournaments...2022 in Qatar, attending our historical win against Argentina. We all went berserk in the stadium! Qatar hosting the 2022 World Cup shows the region's capabilities."

"Our strategy was launched in September 2021. It has seven pillars. The first is player pathway. Number

2 is women's football. It is truly a crucial part of the development stage we are in."

"In order to develop in playing we have to develop our youth and our talents, and the people around those talents. Coaches, staff, referees, admin staff. On top of that you are talking about infrastructure and development in schools."

He agreed that staging the 2027 men's Asian Cup is a building block to hosting the World Cup. "We won the Asian Cup three times but we haven't ever hosted the Asian Cup."

"Talking about Cristiano Ronaldo, having Cristiano play in the Saudi Pro League is massive. We welcome the spotlight around it. You never know, maybe more world stars will come and play in the Pro League."

"Our aim is to develop the beautiful game. We must work together."



" TALKING ABOUT CRISTIANO RONALDO, HAVING CRISTIANO PLAY IN THE SAUDI PRO LEAGUE IS MASSIVE. WE WELCOME THE SPOTLIGHT AROUND IT. YOU NEVER KNOW, MAYBE MORE WORLD STARS WILL COME AND PLAY IN THE PRO LEAGUE.

OUR AIM IS TO DEVELOP THE BEAUTIFUL GAME. WE MUST WORK TOGETHER "

- IBRAHIM ALKABBAA



DEVELOPING THE DIGITAL AND PHYSICAL FOOTPRINT OF NFL



HENRY HODGSON,
General Manager
NFL UK

Capturing the attention of as many people as possible in the UK over the two-week period NFL games are played in London - not just the games themselves - has been a central part of the strategy to increase long-term interest in the UK said Henry Hodgson (General Manager – NFL UK) in his ISC presentation.

Hodgson was talking in the NFL's Home Locker Room at the Tottenham Hotspur Stadium, which has hosted two regular season NFL games in 2019, 2021 and 2022 as part of a 10-year partnership, and is the only purpose-built NFL stadium outside of the USA.

"The games themselves, the Sundays where 70,000 people come into this stadium to have a fantastic time,

is part of [driving fandom] - but we really look to capture the attention of as many people as possible over that two-week period we have games in London, to make sure people understand it's not just a travelling circus that comes into town and goes," he said.

All 32 teams have played a regular season game at least once in London since 2007 and this year the Buffalo Bills and Tennessee Titans will play at the Tottenham Hotspur Stadium as designated teams.

Hodgson said the NFL currently has a global fanbase of 400m, with 15m in the UK. Globally, TV viewership (unique reach) is up 12% year-on-year across core markets, while social following has grown 32% year-on-year.



Hodgson added that in the USA the biggest challenge the NFL faces at the moment is making sure the Gen Z and Gen A audience continues to be interested and engaged in the sport.

Metaverse partnerships with Roblox and Fortnite, flag football and augmented reality with Nickelodeon were called out as recent key initiatives the NFL has embarked on to achieve that.

The Roblox partnership has seen the NFL reach 200m global active users with 70% under the age of 18, 44% of which are female. Hodgson added that the Roblox environment will be one that presents commercial opportunities in the future.

" THE GAMES THEMSELVES, THE SUNDAYS WHERE 70,000 PEOPLE COME INTO THIS STADIUM TO HAVE A FANTASTIC TIME, IS PART OF [DRIVING FANDOM] - BUT WE REALLY LOOK TO CAPTURE THE ATTENTION OF AS MANY PEOPLE AS POSSIBLE OVER THAT TWO-WEEK PERIOD WE HAVE GAMES IN LONDON, TO MAKE SURE PEOPLE UNDERSTAND IT'S NOT JUST A TRAVELLING CIRCUS THAT COMES INTO TOWN AND GOES "

- HENRY HODGSON

FORMULA 1 AND FAN ENGAGEMENT



FABIO CALAMOSCA,
Head of Fan Strategy and Planning
F1

F1 was the fastest-growing global sport on social media in 2022 and one in three fans started following F1 in the last four years Fabio Calamosca (Head of Fan Strategy and Planning at F1) said at ISC this morning.

He added that Netflix series Drive to Survive is just one channel through which this fandom is being ignited..

"It's gaming, fantasy, F1TV, F1 Arcade...today the F1 Exhibition also opened in Madrid," he said. "We have attracted a large number of new fans in a short period of time. The majority of [new] fans are fans who have made a connection with the sport...sports fans [talking about F1] within their circle of friends.

"These fans are wearing the F1 badge of honour, and the job for us is making sure we keep on elevating them, so that they stick with the sport before they move on to the next cool thing."

Calamosca said F1's new brand campaign - This is No Ordinary Sport - is targeted specifically at existing sports fans who have previously not engaged with F1. It was launched at the 2023 F1 season start in Bahrain this March.

F1 insight shows that 50% of F1 fans in the US have become a fan in the last year, and a number of marketing initiatives have been created specifically for that market Calamosca said.

This includes the F1 Wake Up Call service which gives fans a phone call from their favourite driver to wake them up in time for the race, in recognition that 80% of races take place in Europe and Asia.

"We've been working on trying to create a Sunday morning ritual for watching the sport in the US. It's a big opportunity because there's not much live sport airing on a Sunday morning," he added.

" IT'S GAMING, FANTASY, F1TV, F1 ARCADE...TODAY THE F1 EXHIBITION ALSO OPENED IN MADRID, WE HAVE ATTRACTED A LARGE NUMBER OF NEW FANS IN A SHORT PERIOD OF TIME. THE MAJORITY OF [NEW] FANS ARE FANS WHO HAVE MADE A CONNECTION WITH THE SPORT...SPORTS FANS [TALKING ABOUT F1] WITHIN THEIR CIRCLE OF FRIENDS.

THESE FANS ARE WEARING THE F1 BADGE OF HONOUR, AND THE JOB FOR US IS MAKING SURE WE KEEP ON ELEVATING THEM, SO THAT THEY STICK WITH THE SPORT BEFORE THEY MOVE ON TO THE NEXT COOL THING "

- FABIO CALAMOSCA



PREVAILING COMPLIANCE ISSUES IN SPORT

ADAM GARSIDE,
Control Risks
Director
Control Risks


TORSTEN WOLF,
Principal
Control Risks


RICHARD DAVIES,
Senior Associate
Charles Russell Speechlys LLP


BARBARA LUSTENBERGER,
Director Legal & Compliance
Infront Sports and Media

Adam Garside set the scene for the discussion: "We hold sport dear, and that is something we should protect. How do you check on who's providing you with money?"

The panel members initially addressed the issues surrounding due diligence on prospective relationships between sports rights holders and potential partners such as sponsors.

Barbara Lustenberger kicked the discussion off by saying she could speak for an hour on the topic! She said: "There are three key challenges: third party due diligence due to the war in Ukraine and sanctions on Russia. Screening companies is very complex. The second challenge is the whole crypto, NFT, metaverse entering sports. The third challenge is the whole betting sector - it is a high risk business. Where are they based, what is the regulatory framework?"

Richard Davies pointed out that the level of due diligence carried out by sports rights holders can vary enormously: "What level of due diligence does the rights holder do on a sponsor? It can be as little as 'where do we send the invoice?'"

Referencing English football and the fit and proper person's test for ownership of clubs, he asked: "How do we regulate the participants? Should human rights factor into these sorts of tests? There's no consensus on that at all."

Torsten Wolf emphasised the practical difficulties with collecting the relevant information: "You need to use sources on the ground. How much money and time is available to the client? Where to put the limited capacity and money that you have? For some sports this is the biggest hurdle. Some sports need to tolerate the risk"

The panel then addressed enforcing existing relationships and ongoing contracts. Davies said: "Audits generally rely on self-reported information, which has its limits. If you have a bad actor, they are not likely to reveal their wrong doing. You've seen how difficult for UEFA it has been to impose their Financial Fair Play regime."

Wolf: "It works best when you link audit and audit clauses to funding. FIFA does something like that, but for the bigger national associations that is not important."



Wolf asked which areas compliance should extend into: "Safeguarding, integrity, money laundering, bribery? The sport is there for the athletes and public entertainment. It is very important you understand what the needs are."

He added, "As well as understanding where the flow of money goes it is also important to understand what if something goes wrong?"

Lustenberger outlined developments in Switzerland with the creation of an independent whistle blowing hotline: "Within one year there were 264 reports. 20% of the cases led to disciplinary investigations."

Davies added: "Press attention is the number one driver of adopting proper processes." He stressed the affect of a scandal becoming public: "What is the reaction of sponsors? The first thing they'll do is work out whether they can terminate the contract."

"SAFEGUARDING, INTEGRITY, MONEY LAUNDERING, BRIBERY? THE SPORT IS THERE FOR THE ATHLETES AND PUBLIC ENTERTAINMENT. IT IS VERY IMPORTANT YOU UNDERSTAND WHAT THE NEEDS ARE.

AS WELL AS UNDERSTANDING WHERE THE FLOW OF MONEY GOES IT IS ALSO IMPORTANT TO UNDERSTAND WHAT IF SOMETHING GOES WRONG? "

- TORSTEN WOLF

REPUTATION, INTEGRITY AND VALUE: STRIKING THE RIGHT BALANCE WITH SPONSORSHIP AND ADVERTISING IN SPORT



JONNY GRAY,
Senior Managing Director
Ankura



LORYNN DEMETRIADES,
Senior Managing Director
Ankura



TODD KLINE,
Chief Commercial Officer and Board Member
Tottenham Hotspur Football Club



NEVENA VUKASINOVIC,
Lead on Influence
BCW

Jonny Gray outlined the parameters of the discussion: "The interaction between brands and rights holders. ESG, financial sustainability, EDI, corporate responsibility. This is about balancing opportunity and risk."

Regarding financial due diligence he said: "The sports sector has some way to go."

Gray highlighted some recent high profile failures in the relationship between sport and sponsors.

- The collapse of FTX, who had multi-million dollar links with a wide variety of sports.
- The collapsing Inter Milan deal with digitalbits, a crypto currency, who became shirt sponsors. "Inter haven't received any payment for these sponsorship deals."

Gray said: "It also works the other way. Phoenix Suns owner Robert Sarver had years of allegations around his conduct. PayPal decided to end their sponsorship. Sarver had to leave."

Gray emphasised how the power dynamics are changing. He explained that Kylian Mbappe feels players should be consulted before sponsorship deals are done. He outlined a Netball Australia deal with a mining company, Hancock Prospecting. The players refused to wear the sponsorship, and the deal collapsed.

Gray also spoke of the importance of planning and communications. He related the tie-up between Shell and British Cycling. Widespread public criticism led to the CEO of British Cycling losing his job.

Things change he said: "Tobacco, betting..what next oil and gas?"

Todd Kline spoke of the nuances of the decisions that have to be made: "Everything is shades of grey. Nothing is black and white any more. We want partnerships, not sponsorships."

Nevena Vukasinovic picked up on Gray's point about how everything changes: "Blockchain and digital transformation of the world is the future, less so oil and gas," she said.

Grey raised the point: "How do you partner with the right blockchain and crypto company?"

Lorynn Demetriades agreed this was important, but sometimes difficult to establish:

"Resources affect the due diligence you can do. Sporting organisations are not insulated from rising financial pressures."

Kline underlined the difficulty: "People get fooled. The criminals are good at what they do! You have to set a framework of what is acceptable. If you are not proud of what they stand for then maybe you shouldn't be reaching out to them."

The panel members discussed the importance of shared values around sustainability and equality, diversity and inclusion in the relationship between organisations.

Kline said: "We're going to work with people who share our values around ESG and EDI." Referencing the recent announcement of Tottenham's development of a karting track at their stadium, he said: "We align with Formula One."

"Ethics are non-negotiable."

Demetriades emphasised the important of research. "How do you get to know them on a personal value? Legacy brands have baggage. Some of these organisations are on a journey." She suggested older businesses should conduct reverse due diligence on how they have conducted themselves in the past. "Trying to hide and deny it is no longer acceptable."

Vukasinovic suggested that brands have the opportunity to set the pace in this area, and not wait for legislation. "CEOs of the brands should be proactive and take the lead ahead of their governments." She suggested an obvious target: "It is the moment for brands to transform women's sport."

" EVERYTHING IS SHADES OF GREY. NOTHING IS BLACK AND WHITE ANY MORE. WE WANT PARTNERSHIPS, NOT SPONSORSHIPS "

- TODD KLINE

DIGITAL INNOVATION



RÜDIGER MÜLLER,
Head of Digital Content Products
FIFA

TALLY

JULI FERRE NADAL,
Managing Director EMEA
Tally Technology



KAHLEN MACAULAY,
Sports Partnerships
Snapchat

A panel of digital innovation experts took to the stage at ISC to discuss how combining the digital and physical worlds can be a “game-changer” when turning Gen Z audiences into lifetime fans.

A recent partnership used to illustrate this was between Snapchat and SoFi Stadium in California, home to the NFL’s LA Rams and Chargers, which has seen AR photo filters used on live shots of fans displayed on the giant “Infinity screen” video boards.

“There’s a lot of potential for fans to really engage on-site but also off-site...in particular when I look at the next [men’s] FIFA World Cup [in the USA and Mexico],” said Rüdiger Müller, Head of Digital Content Products at FIFA - adding that the digital innovation he is most excited about is in connections stadiums.

Kahlen Macaulay (Senior Manager, Sports Partnerships – Snapchat), adding that 250 million people globally currently use augmented reality on Snapchat everyday and it is the company’s mission to “democratise the world of augmented reality and make it available to everybody.”

“We’re really trying to think about the touchpoints of sport and the Gen Z audience and younger consumes sport,” Macaulay added. “They are less likely to watch a full live event or a very long event. But the fragmentation and all those different individual components adds up to much more engagement.”

Juli Ferre Nadal (Managing Director EMEA – Tally Technology) took the opportunity to challenge the sports industry about building meaningful relationships with fans before thinking how fandom should be monetised.



Tally Technology, co-founded in 2018 by Super Bowl champion quarterback Russell Wilson, is a fan engagement and consumer data platform company that collects and segments consumer data to help its partners increase sponsorship and direct revenue.

“When you’re in a football club, you end up talking too fast about monetisation,” he said. “I’m not a big fan of this...before we can do that we need to build a meaningful relationship, so you get data [on the fan] and so they trust you.”

He added rights-holders who are taking a step back and understanding whether they need to embrace the newest shiny product (or not) are the ones leading the way in digital innovation.

“I’ve been inside football clubs and sometimes it feels like you need to jump on the next big thing. We saw that with NFTs,” he added. “Clubs, in particular the top clubs, are really taking one step back. When you talk to the digital teams, they will tell you they cannot cope with everything that is happening because there is so much innovation.”

“But they are taking that step back and looking at what they want to do in terms of digital innovation, and how they can direct the fan conversation.”

“ I’VE BEEN INSIDE FOOTBALL CLUBS AND SOMETIMES IT FEELS LIKE YOU NEED TO JUMP ON THE NEXT BIG THING. WE SAW THAT WITH NFTS, CLUBS, IN PARTICULAR THE TOP CLUBS, ARE REALLY TAKING ONE STEP BACK. WHEN YOU TALK TO THE DIGITAL TEAMS, THEY WILL TELL YOU THEY CANNOT COPE WITH EVERYTHING THAT IS HAPPENING BECAUSE THERE IS SO MUCH INNOVATION.

BUT THEY ARE TAKING THAT STEP BACK AND LOOKING AT WHAT THEY WANT TO DO IN TERMS OF DIGITAL INNOVATION, AND HOW THEY CAN DIRECT THE FAN CONVERSATION ”

- JULI FERRE NADAL

ATHLETE PARTNERSHIPS AND BRANDS



TIM EDWARDS,
Public Figures, Sports and Athletes
TikTok



MATT RICHES,
Head of Partnerships
Lucozade Ribena Suntory



LUCY ENGLANDER,
Group Partnerships Director
Saracens Rugby

What makes a great partnership between athletes, clubs and brands and how do they use social media such as TikTok to develop their relationships and profile?

For Matt Riches everything relates to the aim of the business: "It all comes back to the fact that we are in the business of selling drinks." So how do they decide which athletes can help them achieve improve sales? "We look at all their different metrics, what they do on social media, what they do on the pitch. But we really need to get to know the person."

Riches was keen to emphasise a long-standing relationship: "Anthony Joshua has worked really well for us. Now, it's a real business relationship."

Lucy Englander said that her role at Saracens covered

their men's and women's rugby union teams, plus Mavericks netball team. "Brands are wanting to be involved in women's sport. There is an untapped market there."

"A good sponsor is one who is really activating the sponsorship."

Tim Edwards outlined the importance of sport to his company. He mentioned TikTok's sponsorships at the men's and women's football European Championships and the Six Nations rugby.

Athletes are creating content on TikTok to grow their profile, which also benefits the brands they are linked with. "We help shine a light on culture," he said. "We have an eco-system of athletes on the app. Sharing what their life as an athlete is like."

EVENT PARTNERS



He pointed out the demographics of TikTok users. "It is a uniquely young user base of sports fans as well as a really high percentage of female users. Those users are watching 80 minutes each day of content on the app."

"Sports rights and highlights really work on TikTok when they can use the app and put their own spin on it," he said. "In rugby, Joe Marler messed up a line out, but he used the voiceover tool and he did it in a very funny and self-deprecating manner and that ended up generating more positive press coverage for him."

For a club to grow their presence on social media, Englander said it was important for a club to choose their athletes carefully. "Work with those that are interested. Show the human side of the athletes and that will grow their social presence."

An athlete who is attuned to the latest trends can use those to their benefit. Riches said, "There is an eco-system of trends...around sounds, features, filters. A large part for an athlete is how can you jump on those trends and make it about yourself and your life as an athlete?"

He picked out Arsenal and England star Bukayo Saka's use of TikTok at the World Cup, behind the scenes in the England camp, quizzing players on their spelling.

Englander asked Riches how Saracens should launch on TikTok. He had plenty of ideas: "Think about how you storyboard around match day, build up and post-game. Encourage content creation, get fans to emulate kicking like Owen Farrell for example. People massively over-think how they launch on TikTok. It might be a low-level launch is the most successful."

"IT ALL COMES BACK TO THE FACT THAT WE ARE IN THE BUSINESS OF SELLING DRINKS."

"WE LOOK AT ALL THEIR DIFFERENT METRICS, WHAT THEY DO ON SOCIAL MEDIA, WHAT THEY DO ON THE PITCH. BUT WE REALLY NEED TO GET TO KNOW THE PERSON"

- MATT RICHES

DIGITAL EXCELLENCE



CRISTIAN LIVADIOTTI,
CEO
Backlight Streaming



GUILLAUME POSTAIRE,
Media Factory Director
France Televisions



JOHANNES FRANKEN,
Director of Digital
Host Broadcast Services (HBS)

What does it take to deliver comprehensive digital coverage?

Cristian Livadiotti addressed the main issue directly: "What governs in the digital era is fragmentation, content scattered around tons of platforms. We created a platform to optimise the way they created content to address that fragmentation. We can turn that into an opportunity."

Guillaume Postaire pointed out the change in viewing habits and demands from the public: "5/6 years ago people would consume what you offered them. Now they want the things they want on the device they want."

Johannes Franken emphasised the need to offer a great variety of content, tailored to audience taste and interests: "We have customers from different countries with different appetites. We cater for those needs with a

story for them. China is a big market for Virtual Reality. The World Cup had millions of viewers on VR in China."

Livadiotti agreed: "You have to diversify the format and diversify the story, targeting various parts of the audience, changing the way you are creating and producing the content."

He was keen to stress it is not just about sports highlights clips any longer: "Live sport on digital is coming back, big events like the Olympics and Roland Garros - when you go to digital, you unlock the monetisation of those events."

In terms of highlights of those major events Postaire outlined some major considerations, particularly if the event is taking place in a different time zone: "You have to have in mind, what content, how you deliver and what time of day you deliver. Every contact is important."



Franken emphasised the need to think smartly: "You need to decide where you put your money." He admitted that footage from a smartphone can be better than a 4K television camera. "The picture that came out of the smartphone has authenticity."

Speed is essential, Postaire said: "If you are not on social media within seconds, you have lost it. You need to be online quicker than everybody."

Livadiotti: "Click a button and be live right away. You need to ensure whatever happens you click a button and you are out there. Not just in sport, but also in news. Speed is key if you want to prevail on digital."

And what of the future? Franken had an interesting view on AI. "People [staff] are scared of it. But the pressure coming from the tool will make our editors better. It will push us to a new level of what we can deliver."

Livadiotti added: "The goal has never been to replace humans. AI is just a tool box."

" WE HAVE CUSTOMERS FROM DIFFERENT COUNTRIES WITH DIFFERENT APPETITES. WE CATER FOR THOSE NEEDS WITH A STORY FOR THEM. CHINA IS A BIG MARKET FOR VIRTUAL REALITY. THE WORLD CUP HAD MILLIONS OF VIEWERS ON VR IN CHINA "

- JOHANNES FRANKEN



WOMEN IN FOOTBALL



YVONNE HARRISON,
CEO
Women in Football



HEIDI PELLERANO,
Chief Commercial Officer
Concacaf



MONIKA STAAB,
Women's National Team (Former) Coach and Technical Director
Saudi Arabia Football Federation (SAFF)

Senior figures from women's football emphasised that major football events alone cannot be relied upon to drive investment into the game at the 'Women in Football' session at ISC 2023.

Despite the successes achieved in creating opportunities for young girls in the UK following the UEFA Women's Euro 2022, Yvonne Harrison, CEO of Women in Football, said enthusiasm cannot unpick decades of under-investment into women's football.

Women in Football is a membership network of professionals that champions female talent in a bid to bring about a change in attitudes to women working in the industry.

"You can host all the major events you want but if you don't have strategy, [positive] things are not going to happen in a structured and meaningful way," Harrison said. "The Lionesses stand for equality and promoting the women's game, and they see it as their role to help create opportunities for young girls who want to play. The first thing the Lionesses did when they won the Euros was equal opportunities in every school for every girl. You kind of sit back and think... 'What? We don't actually have that?'"

Harrison was talking alongside Heidi Pellerano (Chief Commercial Officer – Concacaf) and Saudi Arabia's Women's National Team Technical Director Monika Staab.



Pellerano reflected on the challenges she has faced being a high-profile female in football: "There aren't a lot of women working in football at our level. It takes a lot of boldness for an organisation. We've all been in situations where 'mansplaining' takes place. I've been mansplained a lot. Nothing gets me going more than that.

"I've done this job for a long time and I feel very confident in my role. You deal with these things. When I moved into football from the agency world it felt like I moved back in time 40 years...but at the same time it made me realise I had made the right move."

Monika Staab, who is also a former coach of the Saudi Women's National Team, added that women's football in the country is thriving thanks to buy-in across the country - buy-in that tends to be misunderstood globally.

"All the girls want to play and now they are allowed to play," she said. "The federation established a Women's Football Department in 2019. The General Secretary is very supportive. It is point number three in the [Saudi Arabian Football Federation's] strategy to have women's football developed and supported."

"THE LIONESSES STAND FOR EQUALITY AND PROMOTING THE WOMEN'S GAME, AND THEY SEE IT AS THEIR ROLE TO HELP CREATE OPPORTUNITIES FOR YOUNG GIRLS WHO WANT TO PLAY. THE FIRST THING THE LIONESSES DID WHEN THEY WON THE EUROS WAS EQUAL OPPORTUNITIES IN EVERY SCHOOL FOR EVERY GIRL. YOU KIND OF SIT BACK AND THINK... 'WHAT? WE DON'T ACTUALLY HAVE THAT?'"

- YVONNE HARRISON

BRAND PARTNERSHIPS



SARAH BATTERS,
Director of Partnerships and Marketing
Southampton FC



ANTHONY DOUGLASS,
Legal Director, IP, Data Protection, Marketing & Digital Strategy
Specsavers



RICHARD BARNWELL,
Head of Partnerships
Yolo Group (sportsbet.io)

What makes a good brand partnership?

Richard Barnwell detailed Yolo's involvement in football. "We partnered with Watford FC and are a crypto first company and do a lot of work on the blockchain. We put the bitcoin logo on the Watford shirt sleeve."

"We're quite a unique industry, gaming with blockchain technology. We like long term partnerships. We need to know that our partner has some interest in the technology we're working in."

Yolo are currently in partnership with Southampton FC. Sarah Batters agreed that Southampton and Yolo are a good fit. "Shared values, our ownership group - a sports tech company, your company, and Southampton as a brand."

"Everything we do is to ask 'what are we doing for our fans'. Everything is for the benefit of the fans. What

is the next technical development that brings fan engagement?"

"We've just done our second bitcoin hunt, partnering that could change the life of one of our fans. Yolo are sponsors of our Foundation."

Anthony Douglass explained how Specsavers have adapted their strategy. He said they are in a period of recalibration that is reflected in a different style of sponsorship, and what their brand messaging needs to look like.

"Specsavers is a very aspirational brand. Historically, we've done a lot more than we do today. A few years ago it was the County championship up to the Ashes. Local stores have a lot of autonomy to engage with their local communities."



"There is a definite need to re-engage with sport at a grass roots level."

He referenced Specsavers needing to reach a younger demographic so they sponsored a charity match involving the YouTubers Sidemen that has now had over 54 million views.

They engaged with Cavaliers FC 'the worst team in the country' who asked for some help. They put together a YouTube channel. "It's about accessibility."

"You have to engage with the right sort of influencers."

" WE PARTNERED WITH WATFORD FC AND ARE A CRYPTO FIRST COMPANY AND DO A LOT OF WORK ON THE BLOCKCHAIN. WE PUT THE BITCOIN LOGO ON THE WATFORD SHIRT SLEEVE.

WE'RE QUITE A UNIQUE INDUSTRY, GAMING WITH BLOCKCHAIN TECHNOLOGY. WE LIKE LONG TERM PARTNERSHIPS. WE NEED TO KNOW THAT OUR PARTNER HAS SOME INTEREST IN THE TECHNOLOGY WE'RE WORKING IN. "

- RICHARD BARNWELL



FAN ENGAGEMENT – WHAT NEXT?



WILL PITHERS,
Strategic Partner Manager | Sports Partnership
Meta



SERGIO FRIEDE,
Head of Marketing and Growth
NBA



TOM MCDONNELL,
Co-founder/CEO
Monterosa



SATPAL GHATRORA,
Head of Product
Sky Betting and Gaming

D2C is much more than live streaming OTT - it's the opportunity to create a one-stop shop for fans to engage with the sport or sports properties they love. That was the message from Sergio Friede (Head of Marketing and Growth – NBA) at this year's 'Fan Engagement – What next' session at ISC.

Joined by Will Pithers (Strategic Partner Manager | Sports Partnership – Meta), Tom McDonnell (CEO – Monterosa) and Satpal Ghatrora (Head of Product – Sky Betting and Gaming), Friede was giving details on the strategy behind his organisation's new app, launched in September 2022 as an "all-in-one destination" for fans.

"[NBA commissioner] Adam Silver is thinking about D2C in a different way. He is thinking about how D2C can reach fans across all touchpoints," Friede said, alluding to features such as behind-the-scenes coverage and archive games.

"Only 1% of our international fans will ever go to a game. How can we use D2C to bring the US closer to our international fans? Investment in our app is long-term

play based on the opportunity that we see in the number of fans we have globally," he added.

Will Pithers from Meta explained how the organisation's Instagram platform has been used to great effect by sports rights-holders giving greater context to a memorable moment that happened on the pitch. His case study of best practice was the English Football Association's interview with Jude Bellingham, in which he explains his "intense" celebration with Jordan Henderson after the latter scored against Senegal at the 2022 FIFA World Cup.

"It encapsulates exactly what social media content can do in giving that extra level of context alongside live TV," Pithers said. "Everyone saw the moment live and we know you can go to social the next day for more. We're seeing increasing amounts of that, not just from teams but from publishers too."



When the conversation moved onto the role AI will play in fan engagement, Monterosa's McDonnell said tools like ChatGPT are going to cause "more of an iPhone moment than an NFT moment" - while Ghatrora added AI was being used to great effect in the safeguarding customers at Sky Betting and Gaming.

McDonnell said: "We've been using [ChatGPT] to suggest ideas...and it takes three seconds, whereas in the past you'd have to think and then write down. It's saving huge amounts of time more than anything. This is just the start."

Ghatrora added: "We're looking at customer behaviour to try and anticipate things and act before they happen...it is a number one priority for the business."

" EVERYONE SAW THE MOMENT LIVE AND WE KNOW YOU CAN GO TO SOCIAL THE NEXT DAY FOR MORE. WE'RE SEEING INCREASING AMOUNTS OF THAT, NOT JUST FROM TEAMS BUT FROM PUBLISHERS TOO "

- WILL PITHERS

SPORTS EVENTS – THE FUTURE



GORKEM DONMEZ,
General Manager
Gloria Sports Arena



KAMEL BADAWY,
Business Management and Intelligence Director
Qatar's Aspire Zone Foundation



KEITH BRUCE,
President
Quint Events



BRENDAN WILLIAMS,
Chairman Commonwealth Games Federation's (CGF)
Athlete's Advisory Commission

One of the final sessions at ISC 2023 looked ahead to the future of sports events.

The panel brought a range of perspectives to the table. There were two venue operators represented, with Gloria Sports Arena General Manager Gorkem Donmez and Kamel Badawy, Business Management and Intelligence Director of Qatar's Aspire Zone Foundation.

They were joined by Keith Bruce, President of Quint Events and F1 Experiences, and Brendan Williams, Chairman of the Commonwealth Games Federation's (CGF) Athlete's Advisory Commission.

Between them the group delivered some valuable insights into how sports events are changing, based on some fundamental ideas about where they add value culturally and commercially.

Venues need a diverse long-term event plan

Gloria Sports Arena is a multi-sport complex in Antalya, Turkey. Built in 2015, it serves over 50 sports through performance training camps and has an on-site sports medicine facility.

In order to be viable, however, it needs to have a consistent flow of events running through its calendar. Gloria Sports Arena, Donmez explained, has approached that challenge from different angles to ensure it can build on success and improve its offering to fans and athletes alike.

It is "cooperating with international federations" to bring in more existing competitions, while also making the most of good local weather and its accessible location for athletes across the MENA region to establish itself as a training venue. But with Antalya still working to build a reputation as a sports tourism destination, Gloria Sports Arena has also created its own branded events that can attract fans and leading competitors while also showing rights holders its capabilities.

Cultural exchange delivers across sectors

Events of all sizes now feature associated activations and experiences, from fan zones and skill challenges to concerts and food markets. At a tournament on the scale of the Qatar 2022 Fifa World Cup, the breadth of options available to fans grows exponentially.



For those efforts to be effective, Kamel Badawy suggested, organisers "really need to know what people want". Cultural activations should fulfil a specific commercial purpose or cater to a specific part of the audience.

"Let's talk about, for example, the Argentinian fans that [came to Qatar 2022]," he said. "Everyone knows Argentinians love steak, they love to have their own community, they love to have a place where they have fun and enjoy themselves."

These activities can improve the fan experience but the audience development aspect is also crucial to the future performance of events and event hosts.

"The event is not about the number only of people that are attending," Badawy added. "The event is about how people are interacting with it."

He suggested that by giving people a taste of what they enjoy, you are likelier to see them return in the years ahead.

A better fan experience can inspire a better athlete experience

The Birmingham 2022 Commonwealth Games, Brendan Williams believes, were an opportunity for athletes and fans to release the pent-up emotion of the Covid-19 pandemic.

They were a reminder as well of the importance of forging links between competitors and the community around major events. "We could see through an independent review conducted that we had a record number of ticket sales – 1.3 million ticket sales – for the Birmingham Games," he noted. "And we saw the increase in performance is not only from our top-level athletes, but the athletes who came from the lower spectrum."

Birmingham's multi-cultural nature meant hundreds of athletes could count on local support but it also

gave them plenty to explore around the city. Seeing performers appearing around their neighbourhoods grounded the experience for local people but it also created memories for the athletes.

The CGF has been working to improve the wellbeing of all its competitors and, Williams says, "it is important that you actually visit the country" in order to really bring the experience home.

Giving fans access is the future

Quint Events has been working with Formula 1 and its owner Liberty Media to create unforgettable new experiences at Grands Prix, getting hardcore and newer fans behind the scenes for a sense of the championship they have glimpsed on live broadcasts and the Netflix show Drive to Survive.

Fans might be attracted to the legacy of venues like Monza or Spa, or the way unique experiences are built into more recently finished tracks like the one at Miami's Hard Rock Stadium. Developing concepts that chime with the local character is key but principally, the goal is to leave visitors with something only sport can deliver.

Together with the NBA, he added, Quint Events has been trying to find ways of getting supporters on court with players for warm-ups – breaking some of the final barriers between the fan and the action.

"Because if you're 10, or 12, or 16, or 18, and you have that kind of opportunity, you're a fan for life," he said. "And you'll remember that whether you're down on the grid in Formula One – because you had an ability to do that, and we made it possible – you're on the basketball court, you're on the football pitch, you're on the cricket ground, whatever it is, how do we get you as close as we can get you as part of the ticketed experience? And so that's what we're constantly looking to do and pursue."

PRIVATE THOUGHT LEADERSHIP ROUNDTABLE - WOMEN IN SPORT

The Marketplace

What's missing from the fundamentals in women's sport & key opportunities

- The market is fragmented but there is still no 'go-to' destination for fixtures, team news, scores etc.
- Example of WTA who have been ahead of the curve for women's sport, but have always lagged behind men's tennis and the ATP
- Massive opportunities for platforms to aggregate women's sport and improve SEO/coding so that search results give women's sport result rather than only ever seeing men's sport result
- Sentiment that women's sport will only ever be seen or treated as equal once female athletes are competing alongside male athletes
- There is parity in terms of coverage and data available around women's sport but also need to acknowledge the uniqueness of women's sport and leverage that to help grow it
- Celebrate our differences but recognise when we can bridge the gap between women and men's sport
- Until sport is seen at an equal sense at the base of the pyramid, it won't filter up to the top of the pyramid at the elite level
- We need to be able to give young girls more choice around sport participation early in their lives such as at school or encouraging extra-curricular participation in other leagues



Money into Women's Sport

How the market is moving — Where rights holders are investing or how broadcasters are doing more in women's sport

- Girls can now see themselves on TV and broadcasters should feel a sense of responsibility to show more opportunity for young girls and athletes. They are able to share and tell those stories around women athletes
- Separating TV guides and search results to be able to recall the correct information around women's sport
- Governing bodies are slow to paying attention to how the women's game is represented globally but there is progress happening. Time for Rights Holders to be bold and push their women's programmes forward — can't solely rely on media coverage to do the work for them
- Some women's finals are getting bigger audiences than mens' finals i.e. Women's Euro 22 on BBC, US & AUS Open in tennis
 - When these events are available, people are interested

Importance of commercials and how we get brands to realise the potential and value of women's sport. What are the best ways of achieving this? Why brands may latch onto talent or campaigns around big women's sporting events & the importance of alignment with the right partners.

- Brands see value in women's audience and want to align with them. Growing the understanding that women are a huge commercial market for many brands because they are the key decision makers for household buying
- Awareness, behaviour change and participation is key for brands getting involved — they want to be able to access where they can benefit the market but also help to influence behaviour change

- Brands now care about where they put budget. There is so many options they could invest in but a lot of brands are now questioning the core audience they can reach and who is best positioned to tell that story for them to align with
- People connect with stories and even through peaks and troughs of 'on-field success' brands can find ways to tell those stories through women's sport
- Brands can show they are committed to driving change by the kinds of sport they align with and defining who their target audience is

How brands and rights holders communicate why they are working together should be thoughtful and with intent. Demonstrating needs and evaluating potential reasons why brands latch onto sport or choose a particular sport or athlete is key to building an authentic and purposeful alignment to women's sport.

Audience & Broadcast

Digital strategies that rights holders are deploying to drive audience growth? Should short form content be prioritised?

- Is this the time to be brave and look at women's sport and be ahead of the curve, unlocking those that aren't 'avid women's sport fans' and use this as a strategy to revamp how people engage with women's sport in slightly different ways

Additional Takeaways from the Round Table

- As a whole decisions within the industry are dictated by men which, on many occasions, have been unfavourable for women
- Interesting dynamic that women have between choosing family and choosing career. Some choices are still condemned even though women should feel empowered by making a choice based on what's best for their personal circumstances



EXHIBITION SPACES

"AS AN EXHIBITOR OF THE ISC 23 IN LONDON'S BEAUTIFUL TOTTENHAM STADIUM, WE HAD AN INCREDIBLE TIME SHOWCASING OUR PRODUCTS AND NETWORKING WITH INDUSTRY LEADERS. WE ESPECIALLY LOVED THE LOCATION AND OUR EXHIBITION STAND AND LOOK FORWARD TO NEXT YEAR'S EVENT."

- ANDREAS BESTÄNDIG,
Plazz Ag/Polario

"ATTENDING ISC LONDON IS ALWAYS A GREAT EXPERIENCE AND OFFERS A FRESH PERSPECTIVE ON THE LATEST INDUSTRY TRENDS AND BEST PRACTICES. THE EVENT WAS A TREASURE TROVE OF STIMULATING DISCUSSIONS, NETWORKING AND INFORMATIVE PRESENTATIONS, OFFERING VALUABLE INSIGHTS INTO EMERGING TECHNOLOGIES AND INDUSTRY CHALLENGES."

- ROSS TANNER,
Director Sales, Magnifi



"ISC WAS A GREAT EVENT WITH A GOOD MIX OF OPERATIONAL AND SENIOR PEOPLE FROM ACROSS THE SPORTING SPECTRUM FROM RIGHTS HOLDERS TO GOVERNING BODIES. IT GAVE US A REAL OPPORTUNITY TO DISCUSS OUR OFFERING WITH MULTIPLE STAKEHOLDERS. THERE WAS ALSO A GOOD INTERNATIONAL PRESENCE."

- MATTHEW MCGRORY,
CEO, Arwen

"SENDING THE TEAM TO ISC IS ALWAYS SUCH A BREEZE AS NIGEL AND HIS TEAM HAVE MASTERED THE ART OF FLAWLESSLY ORGANISING THE EVENT AND BRINGING TOGETHER THE BEST OF THE INDUSTRY TOGETHER TO NETWORK AND SHARE INSIGHTFUL INFORMATION ON WHAT IS SHAPING THE FUTURE. A GREAT CONFERENCE TO NOT ONLY SHOWCASE YOUR LATEST INNOVATIONS, BUT ALSO SO MUCH TO IMBIBE FROM INDUSTRY EXPERTS"

- GEETANJALI DOGRA MEHTA,
Events & Content Manager, Magnifi

GUINNESS WORLD RECORDS

At ISC 2023 Guinness World Records gave delegates that chance to become a Guinness World Records™ title holder! Delegates had the chance to immortalise themselves and become part of an exclusive group, all while being under the watchful eye of one of their world-renowned adjudicators.

" WE WOULD LIKE TO EXTEND OUR SINCERE GRATITUDE TO ALL THOSE WHO VISITED OUR GUINNESS WORLD RECORDS STAND AT THE ISC AND ENGAGED WITH US DURING OUR ATTEMPT TO BREAK THE WORLD RECORD FOR THE LONGEST-DURATION COIN SPIN. ALL YOUR INTEREST AND ENTHUSIASM IN THE RECORD-BREAKING PROCESS WAS REFRESHING TO SEE AND MUCH APPRECIATED BY OUR TEAM, AND WE ARE DELIGHTED TO HAVE MADE SOME GREAT CONTACTS ALONG THE WAY. WE HOPE OUR CONVERSATIONS WERE HELPFUL AND INFORMATIVE AND WE ARE CERTAINLY LOOKING FORWARD TO BEING A PART OF YOUR RECORD-BREAKING JOURNEY. THANK YOU ONCE AGAIN FOR YOUR TIME, AND WE CAN'T WAIT TO SEE YOU AGAIN AT FUTURE EVENTS "

- WILL BAXTER-HUGHES,
Commercial Marketing Manager, Guinness World Records



CSM LIVE

One lucky delegate got the chance to win themselves and 7 guests the use of our event partner's, CSM Live's, hospitality box at Wembley Stadium for the Women's FA Cup Final on the 14th of May.

CSM Live is driving the event management industry through defining, designing, and delivering award-winning experiences with impact. Their innovative expertise and global presence allow for CSM Live to successfully connect brands with rights holders and fans, invent new revenue streams, and create impactful engagement around the world. CSM Live took responsibility for the scoping, production, and delivery of all branding elements at ISC 2023.

CSM Live took responsibility for the scoping, production, and delivery of all branding elements at ISC 2023. CSM Live also hosted the sport and sustainability roundtable with leading rights holders and event organisers. (Top image)



DELIVERING EXCELLENCE AT EVERY TOUCHPOINT THROUGH ISC

" IT'S BEEN A GREAT TWO DAYS HERE AT ISC, AS ALWAYS A MIXTURE OF CONTENT, NETWORKING AND SOCIALISING. WE LOOK FORWARD TO WELCOMING EVERYONE BACK AT A SIMILAR TIME NEXT YEAR FOR OUR 15TH YEAR "

- NIGEL FLETCHER
CEO, ISC

" VOLUNTEERS HAVE BEEN VITAL TO THE DELIVERY OF THE INTERNATIONAL SPORTS CONVENTION FOR THE PAST 14 EDITIONS. OUR COLLABORATION WITH THE UNIVERSITY OF EAST LONDON IN RECENT YEARS HAS BEEN BENEFICIAL ON BOTH ENDS. OUR EDUCATIONAL COURSE AND TRAINING HAVE ENABLED PARTICIPANTS TO TRANSFER NEW AND IMPROVED SKILLS INTO THEIR WORK LIFE. "

- ERIN GENNARD
Project Coordinator, ISC



Leading figures from the business of sport around the world gathered at the Tottenham Hotspur Stadium for two day of insight, debate and discussion. Plus countless networking and business development opportunities.

A key component of many of the wide-ranging conversations on the conference panels was how sport can embrace and benefit from the extraordinary pace of change in the modern world, particularly around new technology. How to balance the risk and opportunities. From sponsorships, to broadcast, to social media, to compliance and integrity.

If you wanted to learn from technology specialists about the world of the metaverse and NFTs or perhaps understand how sports organisations around the world, like Premier League clubs in England or Bundesliga clubs in Germany, are planning on exploiting these new developments - you were in the right place. Or maybe you left better informed on the likely impact of AI, and how the world of sport - including broadcasters and rights holders - can harness the power of that new technology.

Key decision makers from organisations such as FIFA, F1, NFL, European Tour Group, Wimbledon tennis, and from our hosts at Tottenham Hotspur shared their expertise and insight. Over 100 speakers drawn from a global platform contributed to two days of rich discussion for the benefit of the delegates.

Discussion regularly returned to the importance of sustainability and equality, diversity and inclusion in the modern world of sport. Many speakers emphasised the potential for growth and opportunities for brands involved in women's sport in particular.

International Sports Convention Chief Executive Nigel Fletcher said: "It's been a great two days here at ISC, as always a mixture of content, networking and socialising. We look forward to welcoming everyone back at a similar time next year for our 15th year."



THE MEETING PLACE FOR THE BUSINESS OF SPORT

MARCH 20-21, 2024 | TOTTENHAM HOTSPUR STADIUM

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