



ANGEL CITY FOOTBALL CLUB // R + R CONSULTING

The Future of Sports Media

Nathalie Robertson & Doug Reid

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1.1 Project Overview

This exploration of the possible Futures of Sports Media is intended to assist Angel City Football Club (ACFC) in designing its near-term media strategy amidst a changing media landscape. ACFC is an expansion team of the American National Women's Soccer League (NWSL). The team application was accepted in 2020 and their inaugural season kicked off in April 2022. Angel City's founders are successful women in entertainment, technology, and sport and are united by an activist goal to use ACFC as a platform for equity and impact. Their aspiration is to create a global brand on par with the New York Yankees or FC Barcelona and they see ACFC as the first product of that brand platform. (Corban & Ryssday, 2021). To achieve their activist ends, the business model of the organization has been designed as an engine of profit and purpose; 10% of every sponsorship dollar is directed to a community impact project. Sponsors choose a specific area of impact and work with Angel City to identify partner organizations working on that issue.

Before ACFC had played their first game, the team booked \$35 million in sponsorships including multi-year agreements (Hruby, 2022). ACFC broke NWSL records with a \$100 million valuation which is more than double the next-highest NWSL team (Hruby, 2022). Once their season had begun they achieved record-high in-person attendance for the NWSL, selling out the 20,000-seat Banc of California stadium 4 times during 2022 and earning a 90% ticket subscription renewal for 2023 (Carp, 2022). Although the team failed to make the season playoffs, they made a strong challenge in their first season to place eighth of twelve. These early success metrics are promising for an NWSL soccer team, yet ACFC's goals of a global brand platform require success on a larger scale.

Historically, ticket sales, sponsorship and media deals are the winning combination for team success and this is where Angel City runs into its most significant obstacle. The percentage of media coverage women's sports receives isn't reflective of the number of women

participating in sports nor is it reflective of the audience demand for access to women's sports. Although 40% of sports participants are women and 84% of sports fans are interested, Women's sports received just 4% of global traditional media coverage (UNESCO, 2018). In fact, fans of women's sports have had to become adept at seeking out opportunities to watch their favourite teams and athletes 43% (482m) of the record 1.12 billion 2019 FIFA Women's World Cup viewers were digital (Glass, 2019). ACFC's audience growth and revenue will hit a ceiling without an order of magnitude increase in its share of global media. ACFC must design a media strategy that enables them to connect with fans and build an audience beyond the limitations traditional media have placed on Women's sports.

In our exploration, we have used a 2x2 scenario building technique to determine possible futures as we examine the critical uncertainties of media rights distribution and fan loyalty. As Angel City must form their media strategy within a competitive and changing media landscape, we have focused our exploration on sports with an established global popularity and fan base as well as new-entry sports connecting with fans to gain widespread global interest. Our view is global, in that we focus on the interests of sports teams and actors seeking global audiences. **Our horizon is the year 2035.** Each scenario examination includes call-outs and special considerations for women's sports. These insights guide the development of strategies and finally recommendations specific to Angel City Football Club.

Fan loyalty ranges from fixed to fluid. Fixed fans are extremely loyal to a specific team, have deep emotional ties to that team, and spend time and energy deepening their connection to the team. They are emotionally impacted by team wins and losses. Fluid fans are open to change, loyal to players rather than teams, and engage with a variety of sports interests across an omni-channel network. Fluid fans make use of technological innovation to connect with their favourite players and other fans.

Within media rights we consider the extremes of a centralized to highly dispersed approach. Centralized media rights distribution is characterized either by a direct-to-consumer model; a team maintains media rights as the sole owner or partners with one of a few large media partners that dominate the landscape to achieve reach and presence across an omni-channel ecosystem. Highly dispersed media rights distribution results in a portfolio of media agreements with a collection of broadcast and streaming partners. Content is diffused across the ecosystem and new media forms are explored with an innovative and experimental approach.

Changing media consumption habits and sports fan behaviours have caused dominant American sports leagues to question their media strategies. Over the next 13 years, these leagues will renegotiate their media rights distribution agreements and media partners (Weprin, 2022). Their decisions will be influenced by changes in fan behaviours enabled by technological advancements and also impact the trajectory of the evolution of the media landscape.

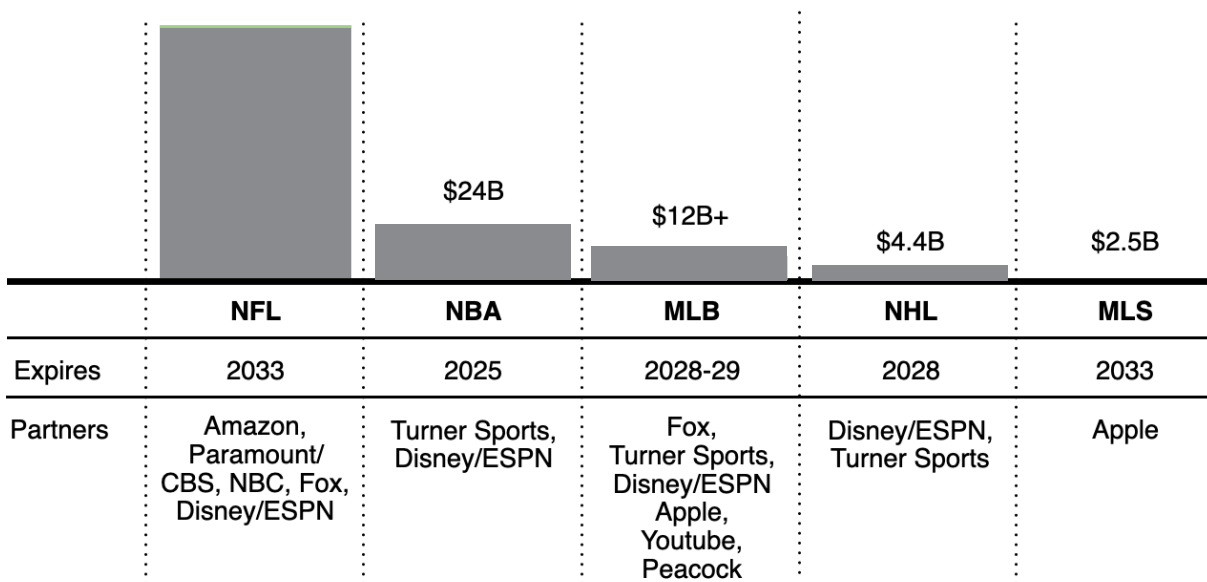


Figure 1 - League TV Rights Deals

Dominant American Sports leagues will renegotiate their media rights distribution agreements and re-evaluate their media partners over the next 13 years. Their decisions will be influenced by changing media consumption habits and fan behaviours enabled by technology advancements. New agreements will impact the evolution of the global sports media landscape. (Weprin, 2022)

1.2 Our Context

Sporting events allow for multiple story arcs. Who will prevail? How will this end? In a world where the desire for media consumption appears to be insatiable, live sports offer the potential of an unfolding drama, one that people love to try to predict, and yet the outcome is often determined by rare moments of human skill,

artistry and happenstance. Whether in person, or on-screen we quickly assign roles to players and teams – the heroes and the Villains – and we are instantly enthralled in an entertainment spectacle, where the ending is always in doubt. **Sports are a near perfect form of entertainment**

The experience of sport has previously been transformed by radio and television, providing an opportunity for connection across time-zones and locations. Through technology, remote viewers felt connected to the energy and emotion of the sporting crowd.

In the 2020s, Sports Media is much more than the broadcasting of a live sporting event. Analysis and punditry have created a media landscape that weaves together the pre-game and post-game experience and even what was once considered the 'off-season' now attracts and maintains viewer interest, in what appears to be a constant season of sports. Moreover, the rise of fantasy sports and betting has further heightened a sustained desire for sports analytics and insights.

Building upon the work of Evens et al (2013), we consider the following stakeholders (Figure 2), as key members of the Sports Media Industry.

For the purposes of our research, we adhere to the following definitions:

Sports Organisations - Professional sports leagues and the professional teams that are a part of the league e.g. NWSL and Angel City FC.

Advertisers & Sponsors - Product and services companies that choose professional sporting events as a vehicle for product advertising and promotion through sponsorship agreements e.g. DoorDash for Angel City FC.

Sports Fans - Followers of professional sports teams who may have fixed allegiances (loyally connected to a sporting team with heritage) or fluid preferences (following players over teams).

Media Companies - Commercial organisations seeking to gain financial gain through the ownership of sports media rights e.g. Disney, Amazon, Apple.

Broadcast/Cable Companies - Incumbent broadcasters of professional sport e.g. CBC, NBC, Fox and ESPN.

Sports Agencies - Consulting firms who focus on providing media advice to leagues, teams and players.

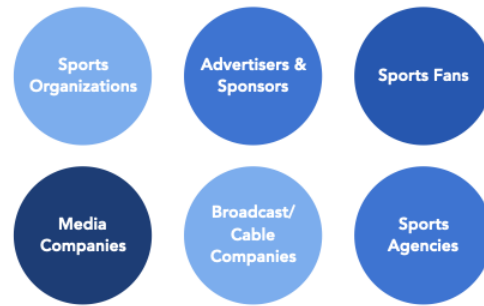


Figure 2 - Sports media industry stakeholders

Traditionally, professional sporting teams operated on the following core economic principles: single-game and season ticket purchases; shared media rights deals orchestrated at a league-level; sponsorship with goods and service providers who are looking to connect with an active fan-base for potential purchases, and a potential upswing in brand recognition; and team merchandise, from player jerseys to customized tail-gating equipment.

For many smaller-market teams, the equitable sharing of the financial windfall from media rights deals has been a key component of their business model. However, despite attempts to diversify into alternative revenue streams, the jenga-block structure of sports media is impacted by the continued reliance on multi-year, billion-dollar media rights broadcasting deals.

As generational tv viewing habits shift, indicating a movement away from traditional cable company deals (where cable viewing packages are often required to gain access to sports networks), the stability of the sports media jenga-stack begins to de-stabilise. Further, starting in 2025, all of the major US professional sports leagues - the NBA, MLB, NHL, MLS and the NFL - will enter into media rights negotiations.

1.3 Our Process

We have employed the methodology of a 2x2 matrix to develop four plausible futures in the near-term horizon of 2035. This method is useful as it will assist Angel City Football Club to develop a variety of strategies in divergent possibilities. Our approach plots each scenario in relation to two intersecting areas of change with high impact and high uncertainty: distribution of media rights and fan loyalty. Each scenario presents potential opportunities and challenges for teams to consider.

We began our project with an horizon scan to identify trends and drivers. We gathered information from a variety of sources: sports marketing reports, trend forecasts, business analysis and research papers, reports from sports organizations, media companies, fan intelligence companies, and popular print magazines and podcasts to identify trends and global drivers salient to our area of focus. During our research, we identified stakeholders whose interests we would include in the analysis of each scenario. We then clustered trends and drivers according to levels of uncertainty and potential impact on our area of focus. We explored the dynamics between these uncertainties by laying them on an axis and extrapolating the potential consequences of the polarities.

We considered technological disruption, media innovation, shifts in fan experience and fan behaviours, and shifts in player power. We explored the impact of climate change, shifts in the role of sports arenas, visualization of sports, 3D game engine development, and sports betting. Experimentation lead us to identify the intersection of media rights distribution and fan loyalty as the areas of change having the greatest uncertainty and impact for the future of sports media.

Media distribution rights are currently the most significant revenue source for major sports teams and leagues and how teams choose to distribute their media rights is foundational to their business model (Zheng and Mason, 2022). The media ecosystem of sports is in a

state of change. Traditional broadcasters are disrupted by streaming platforms. Social media platforms provide direct relationships to fans yet are difficult to manage. As social channels decline in popularity, new open-source social communities are forming. Bundled subscriptions merging sports media and entertainment offerings (Disney, ESPN, and Hulu) attempt to capture audience attention amidst the changing landscape. New media forms such as NFTs, virtual 3D event spaces, gaming and esports have developed expanding the ecosystem ever wider.

The size and loyalty of a team's audience dictates the value of their media distribution rights and fan behaviours are in an era of change. Two extremes of fan loyalty can be seen: fixed, extreme loyalty and deep connection to a team and fluid, moving across an omni-channel ecosystem enjoying a portfolio of favourite players within several sports. The extreme positions of these polarities represent opportunities and challenges for established and dominant sports teams and leagues as well as women's teams and new-entry sports. The media strategies of these actors will be key to their ability to draw in revenue and maintain operations over the next 10 to 15 years.

As Angel City Football Club is one of many women's sports teams, we identified the implications for women's sports teams and new-entry sports in each scenario's conditions. As a group these stakeholders share the following context:

- Women's sports teams and new sports entrants have historically been excluded from the traditional media landscape.
- Investment in women's sports teams and new sports entrants threatens to encroach upon the current power hold traditional sports teams have over share of media

THE FUTURE OF SPORTS MEDIA > PROJECT PROCESS

- The fan bases of Women’s sports teams and new sports entrants included a diversity of identities and cultures that have felt excluded from the fan communities of traditional men’s sports teams. Activation of these groups may lead to potential knock-on effects that extend beyond the sports to cultural and political, and public health domains.

The year 2035 is a useful horizon for women’s sports and new-entry sports because of the following considerations:

- 2035 is the year of the 12th FIFA Women’s World Cup and represents a near-term peak of women’s sports attention towards which stakeholders might plan.
- Between 2025 and 2033, traditionally dominant American sports leagues will renegotiate their media rights distribution agreements and potentially form new media partnerships. Their decisions impact the trajectory of the media landscape.

- 6G, the sixth generation of wireless network technology providing data at a rate of 1 terabyte per second is expected to be released in 2030. A horizon of 2035 allows for 5 years of use and technology innovation utilizing the advanced capabilities of 6G. (Kranz, 2022)

The aim of our project is to develop recommended strategies that will assist Angel City Football Club (ACFC) in designing its near-term media strategy amidst a changing media landscape. To develop strategic recommendations we identified strategies that would be effective in each scenario individually. We then conducted a wind-tunnelling exercise evaluating the potential impact of each strategy as high, medium, or low across each scenario world. We analyzed the emergent strategies from each world and uncovered four strategic focus areas: fan engagement, player investment, audience expansion, and social impact. These areas operate as themes in our recommendations. We completed our process by highlighting implications and signals to watch within each recommendation.

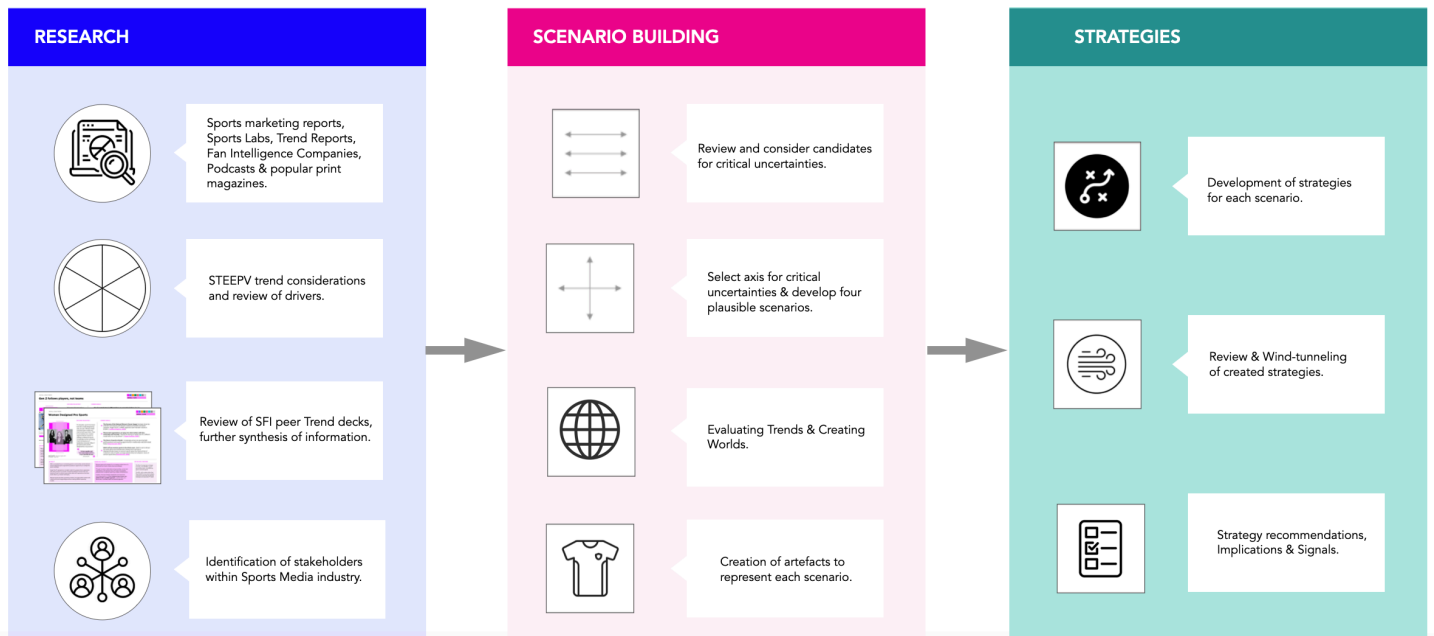


Figure 3 - Research & Scenario Building Methodology

2.1 Possible Futures



Four distinct plausible future worlds in 2035 are identified in a 2x2 matrix.

The following four scenarios represent the polarities of possible futures for sports teams with regard to media rights distribution (centralized and distributed)

and fan loyalty (fixed and fluid). Comparison of the key features, advantages, and disadvantages and implications of each world will assist Angel City Football Club in designing and implementing their media and fan engagement strategies.

2.2 Superstructure

We have employed the methodology of a 2x2 matrix to develop four plausible futures in the near-term horizon of 2035. The horizontal axis, critical uncertainty of media rights distribution, spans the extremes of **centralized distribution**, to **highly dispersed media rights distribution**.

Centralized rights are characterized either by a direct-to-consumer model where a team maintains media rights as the sole owner, or partners with one of a few large media partners that dominate the landscape to achieve reach and presence across an omnichannel ecosystem. Highly dispersed media rights distribution requires a portfolio of media agreements with a collection of broadcast and streaming partners. Content is diffused across the ecosystem

The vertical access represents the critical uncertainty of **fan loyalty, ranging from fixed to fluid**.

Fluid fans are open to change, loyal to players rather than teams, and engage with a variety of sports. Fluid fans make use of technological innovation to connect with their favourite players and other fans.

Fixed fans are extremely loyal to a specific team, have emotional ties to that team, and spend time and energy deepening that connection. Fixed fans are emotionally impacted by team wins and losses.

The four worlds created in this process represent the polarities of possible futures, BetterVerse, Player Power, SuperClub, SuperFan.

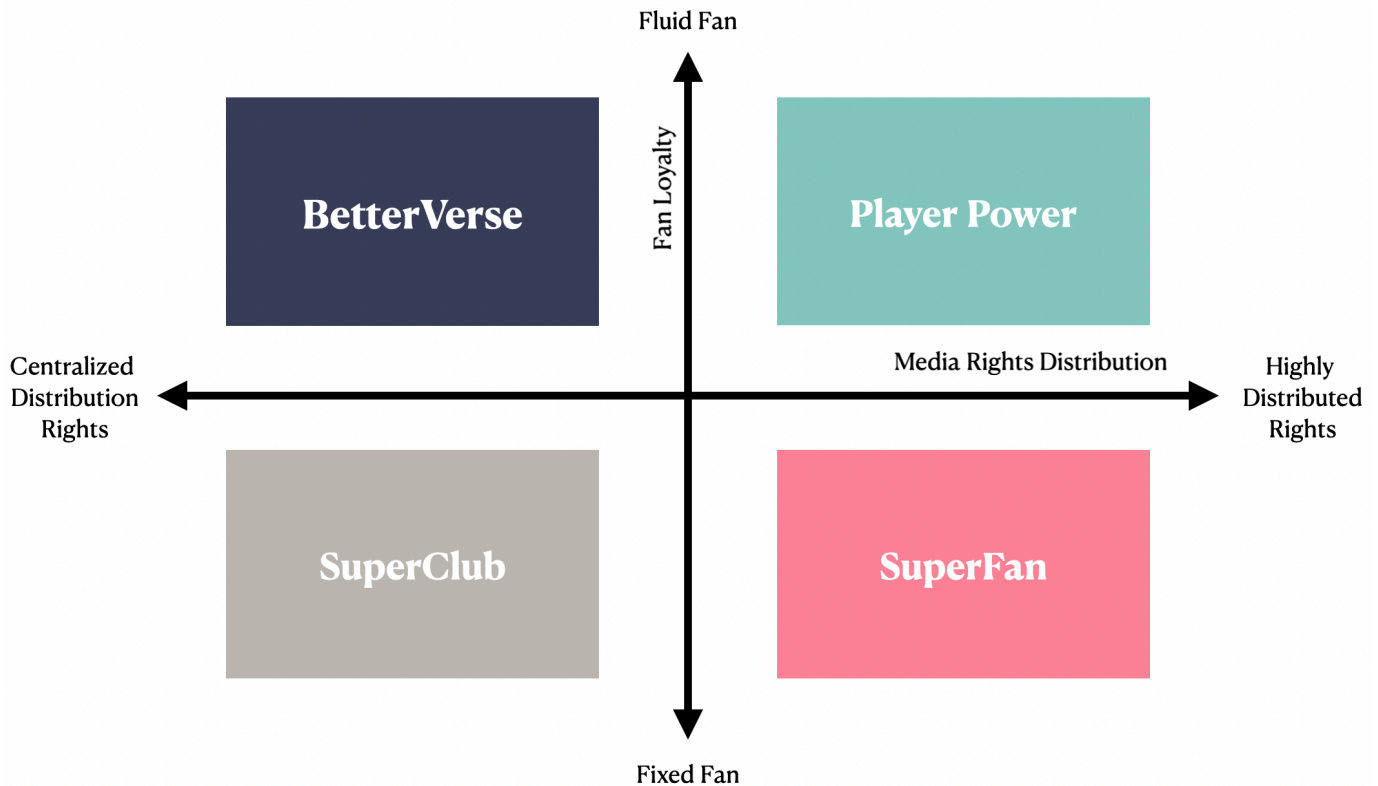


Figure 4. 2x2 matrix of the critical uncertainties, media rights distribution and fan loyalty

THE FUTURE OF SPORTS MEDIA > SCENARIOS

Figure 5 provides a comparison of the four possible worlds, providing a description of the world, the ownership of media rights and the impact on the identified collection of sports media industry stakeholders.

	BetterVerse	PlayerPower	SuperFan	SuperClub
Description	Fluid Fans & Centralized Media Rights.	Fluid Fans & Highly distributed Media Rights.	Fixed Fans & Highly distributed Media Rights.	Fixed Fans & Centralized Media Rights.
Media Rights	Technology/Media giants own media rights.	Players own their own digital rights & teams negotiate media rights to gain access to player platforms.	Myriad of streaming networks bid for broadcast rights on per game basis, with surge pricing for playoffs.	Influential sports clubs retain their own media rights for direct-to-consumer models.
Sports Fans	Fans prioritize personalization and holistic integration of services and content.	Fans follow a collection of players and sports across an ecosystem of channels. Seeking greater alignment in social values with their favourite players.	Loyal fans rely on SuperFans as content aggregators and way finders, curating the fan experience	Fans seek connection and identity through sports affiliations. Membership of the SuperClub becomes a measure of societal success.
Sports Organizations	Teams attempt to attract and hold fan attention by developing extended reality fan experiences.	Teams seek to attract and retain players with significant followings to maintain fan connections.	Teams embrace SuperFans who gain lucrative punditry deals and become sought after commentators & analysts for sports teams.	SuperClubs are the most influential sports clubs across the globe, using their reach & fan loyalty to expand into health care, mobility & finance.
Advertisers & Sponsors	Need to provide competitive and lucrative options to limited array of media giants.	Players with global followings attract individual sponsorship & advertising deals.	Influential SuperFans secure sponsorship deals & advertisers seek access to their following fans.	Clubs consider only limited sponsorship offerings, making them highly sought after.
Media Companies	Technology/media companies have significant influence and have replaced traditional broadcasters.	Player platforms host exclusive media content. Media companies seek partnerships with players.	Hundreds of streaming companies compete to secure individual sporting events.	Direct to Consumer models relegate Media Companies to tech partners, as clubs control their own eco-systems.
Broadcast/Cable Companies	Traditional broadcasters impacted by cord-cutters & changing media habits, lose ability to retain sports media rights.	Cable companies compete to secure partnerships with star players to ensure access to sports content.	Broadcasters have been replaced by a multitude of streaming companies.	Broadcasters may compete for SuperClub specials and documentaries, but games are the sole media property of clubs.
Sports Agencies	Sports Agencies struggle to maintain relevance as broadcasters have been replaced by tech providers.	Sports Agencies pivot to assist players in the creation of unique & bespoke player platforms.	Sports Agencies seek partnerships with SuperFans to gain influence in media buys.	Sports Agencies morph into fan experience consultants, assisting clubs with the creation of eco-systems.

Figure 5. Scenario comparisons impacting key stakeholders.

BetterVerse

CENTRALISED MEDIA RIGHTS + FLUID FAN

In this world, advanced technology providers have merged with media broadcasters to form a few competitive tech-media giants. Each of these tech-media giants hold a collection centralized media rights from athletes, sports teams, leagues, and new-entry sports. To maximize appeal to fluid fans, these athletes, teams, and leagues are unified under a broad and collective identity or brand. The mega tech-media partner orchestrates content and experiences across an expansive ecosystem. Sports collectives attempt to further capture the attention of fluid fans by offering access to a community that reflects the values and preferences of their fan base along with experimental new sports based on fans' preference data.

Within this ecosystem, technology, neuroscience, and psychology are integrated to create a unique holistic and personalized subscription service that curates content and experiences so that each day is optimized to the individual's physical, emotional, and mental needs. Sports are integrated into the mix. A spectrum of memberships options are provided from basic to elite levels of high-tech sensory extended reality (XR) experiences. Entry level fans can provide personal data in exchange for access to services.

World's Key Characteristics

- Collectives of athletes, sports teams, leagues, digital sports, and gaming centralize their media distribution rights with a tech-media partner to reach audiences across a broad ecosystem and extend immersive experiences into areas of interest outside of sports events such as health, training, and education.
- Collectives engage communities in purpose-driven projects and outreach initiatives that back their brand values with action.
- Personalization enables fans a curated media experience reflecting their values, priorities and integrating the many aspects of their daily lives.
- Sports teams attempt to heighten the entertainment value of their fan experience to attract and hold attention by experimenting with extended reality experiences and developing new sports.

How we got here

- Users migrate away from social media platforms to open-source self-hosted social networking services and gaming platforms.
- Frustrated with the challenge of finding events dispersed across several platforms, and the expense of holding more than one subscription, fans flock to aggregator sites, social networking services and portals pirating their favourite content.
- Aggregator sites and individuals pirating content on social networking services are shut down through enforcement of IP and licensing regulations.
- Sports teams and leagues face financial difficulties due to climate change forced relocation, destruction of arenas, and struggle to keep their fans engaged as fluid fan behaviours increase.
- Women's sport teams and leagues form collectives to build communities of fans united by purpose and shared values and expand into gaming experiences and esports.

Role of the Sports rights holders

- Maximize potential audience by working with other like-minded athletes and sports organizations.
- Create a wide range of access points to games and events by partnering with mega tech-media partners.
- Work with tech/media partners to gain data and optimize desirable content and experiences.
- Embrace technological innovations to find new ways to engage fan attention.
- Connect to value-based community actions to deliver on mandate of purpose.

Implications for Women's & New entry sports

- Women’s sports and new entry sports find parity in global media by gathering to form a collective power.
- Physical activity and participation in sport has increased for women, young people, and children with significant uptick in teenage girls and post-menopausal women. It is hoped that this will lead to a correlated long-term improvement in mental and physical health.
- Rates of advancement of women to more senior roles has shown signs of increase.

Acting Forces - Drivers & Trends

Primary Trends & Drivers			
Globalization	Entertain Me Year Round	Unreal Game Engine	Sports Culture Ripe for Change
Tech Disruption of Media	Choice Overload	I Want My Free TV	Reformation Generation
Climate Change	Athletes as Brands	World Wide Sports	Women Designed Professional Sports
Generational Change	The Female Web	Soaring Cost of Sports Media Rights Threatens Cable	Sports Tracking Gets Personal
Financial Volatility	ESports are Watchable Sports	Climate Forced Relocation	
Increasing Health Awareness	Broadcast Blues	Stadiums are Energy Hogs	

Drivers
 Social
 Technological
 Economic
 Environmental
 Values
 Legal

PlayerPower

HIGHLY DISTRIBUTED MEDIA RIGHTS + FLUID FAN

In this world, as fluid fans continue to favour players over teams and leagues, players ascend to their own global media platforms. Players have ownership of their own digital rights and embrace technologies to create exclusive in-game views and immersive experiences. Player platforms truly bring the fan into the in-game experience.

Teams negotiate arrangements with their own players exchanging the team media distribution rights in return for access to players' fans. Fans follow a collection of players and sports across an ecosystem of channels and access points. They seek out more than technical skill and title wins, they look for greater alignment in social values and advocacy with their favourite players.

Players extend their reach into lifestyle networks and social advocacy partnerships with major corporate organizations to build career trajectories that extend beyond their sports roles. In this world, players must carefully curate and control their digital persona to avoid digital cancellation.

World's Key Characteristics

- Extreme weather impacts location availability & viability to play - encouraging players to move to teams that are less impacted by a changing environment, providing more encouragement to follow players, not teams.
- With a reduced work week and a need to maintain health, fans turn to players for health, nutrition and workout advice. The player platform becomes a lifestyle network.
- Cultural emphasis on values driven decisions leads to global megastars and the quick demise of once powerful players through orchestrated social media take-downs.
- Sports players become influential philanthropists capable of social change and sought by Governments to provide authenticity to policies and projects.
- Sports agents morph into Sports Media Platform Agents, securing content creation services and bespoke tech additions for player platforms.

How we got here

- In a shake-up that has similar seismic affects as the Bosman transfer ruling in 1995 (starts player free agency in European Soccer), players gain ownership of their digital rights.
- Leagues are no longer able to negotiate broad media deals, and instead owners seek to sign those players with the most significant social followings.
- Tech advancements, including 6G, allow for immersive fan viewing experiences. Fans can elect to follow single players, or sign up for multiple player subscriptions.
- Working week is reduced to 15 hours, creating an opportunity for Sports to become the New Religion.
- Fans seek lifestyle advice from players to reduce their extensive health care premiums. Player loyalty points are recognised as valid evidence to insurance companies.

Role of the Sports rights holders

- Sports media rights are deemed to be part of digital human rights, and in a landmark ruling, players are awarded the ability to transmit their own player casts.
- In attempts to gain sponsorship reach, sports teams seek to sign players with significant social platforms.
- Players broker collectives that bring unique player combinations to tournaments and competitions.

Implications for Women's & New entry sports

- High profile women players in tennis and basketball create and sustain their own player platforms.
- With a societal desire to address generations of inequity, players embrace the cause of women's sports and put their considerable social capital behind these causes.
- Ironically, traditional broadcasters look to women's sports to regain market share.

Acting Forces - Drivers & Trends

Primary Trends & Drivers			
Globalization	Increasing Health Awareness	Financially Independent Players	How Free are Free-agents?
Tech Disruption	Entertain Me Year Round	Climate Forced Relocation	
Climate Change	Athletes as Brands	Sports Culture Ripe for Change	
Generational Change	Broadcast Blues	Reformation Generation	
Climate Increase in Leisure Time	Player Tracking Market	Politicised Athletes	
Data Collection & Media Rights	I Want My Free TV	Sports Tracking gets Personal	

Drivers
 Social
 Technological
 Economic
 Environmental
 Values
 Legal

SuperFan

HIGHLY DISTRIBUTED MEDIA RIGHTS + FIXED FAN

In this world, fans seek a stronger sense of connection with their favourite legacy/heritage teams. The inflation of Sports media licensing deals has finally proven too much for cable companies and broadcasters to sustain. Despite merger and consolidation attempts, cable companies enter bankruptcy and are replaced with a myriad of streaming networks. These networks bid for media broadcasts on a per game basis, often changing their fees (sports surge pricing) when they secure premium match-ups and for play-offs.

Loyal fans need a new kind of content aggregator, someone who loves their team as much as them – the SuperFan. The SuperFan curates streamed content and offers custom fan-focused content. SuperFans gain lucrative punditry deals and become sought after commentators, and even analysts for sports teams. Co-watching is now an incredibly immersive experience, facilitated by Super Fans.

SuperFans are the ultimate guide for Fans.

World's Key Characteristics

- In a polarized world, where people are tired of being pitted against one another, fans seek solace in the communities offered by SuperFans.
- Nationalistic attempts to restore geographical supply chains cause recurring financial volatility, and the billion-dollar sports media rights deals can no longer be sustained.
- Advertisers and sponsors seek guaranteed returns on investment, and SuperFans with their communities of aligned and engaged fans, represent enticing business opportunities.
- Super Fans gain notoriety through unpolished and 'real-world' commentary and opinion. amateur commentators customize their craft according to the language, level of expertise, or fandom of specific target audiences.

How we got here

- Cord-cutting ultimately bankrupts cable companies, creating a void for sports media rights.
- Social media platforms, decentralized grassroots initiatives, and influencers with high global reach increasingly challenge traditional power structures.
- Cyclical national recessions drastically reduce organizations' willingness to invest billions in the potential returns associated with sports sponsorship.
- Fibre connections to every household negate the barriers to broadcasting.

Role of the Sports rights holders

- Media rights are volatile and in a state of flux. 100s of streaming companies bid for individual game broadcasting rights.
- Games in smaller markets, may only be viewable through authorized SuperFan casts, as some media companies will not bid on those games.
- In this fragmented media landscape, streamers compete for sports teams and viewing markets. Analytics play a huge part in the investment selection, trending out fan interest and intent to purchase for advertisers and sponsors.

Implications for Women's & New entry sports

- Women's sports, traditionally overlooked, become key markets for streamers. The fan persona for women's sports aligns with highly sought-after consumer preferences that sponsors are seeking.
- Streamers bid for exclusive rights to women's teams, bringing a long sought-after, consistency and prominence to the viewing of women's sports.

Acting Forces - Drivers & Trends

Primary Trends & Drivers			
Globalization	Entertain Me Year Round	Soaring Cost of Media Rights Threatens Cable	
Tech Disruption of Media	Choice Overload	Alternative Economies	
Generational Change	Athletes as Brands	Reformation Generation	
Increase in Leisure time	The Female Web	How Free are Free-agents ?	
Financial Volatility	Broadcast Blues		
Data Collection & Media Rights	I Want My Free TV		

Drivers
 Social
 Technological
 Economic
 Values
 Legal

SuperClub

CENTRALISED MEDIA RIGHTS + FIXED FAN

In this world, Superclubs are the most influential sports clubs across the globe, using their reach and fan loyalty to ultimately expand into health care, mobility & finance. Superclubs attract investments from powerful syndicates, allowing for the creation of exclusive and walled media networks. With world-wide appeal and Direct-to-Consumer models Superclubs bypass any need for league media deals and negotiate directly with advertisers & sponsors.

Technology arms races are prevalent across Superclubs, where immersive technologies are layered to maintain fan interest - locally, globally and virtually. SuperClubs have the wealth to transform stadiums into media and entertainment resorts, constantly enhancing the in-person experience with layered multimedia extensions, and the virtual experience through bespoke offerings.

In-person viewing is still considered the premier way to experience sports. Newer stadiums have smaller capacities, but regular attendance is now almost exclusively curtailed to the financial elite. Loyal fans on lower incomes plan for stadium pilgrimages every five years.

World's Key Characteristics

- Cultural emphasis on connection and identity through sports affiliations. Membership of the SuperClub becomes a measure of societal success.
- The subscription culture of the previous decades paves the way for the SuperClub to simplify the fixed fans digital experience. A recurring bundle of subscriptions from loyal fans creates an almost guaranteed source of revenue.
- Financial markets collapse drive people to look for alternative investment models. Fantasy sports and sports betting become accepted forms of retirement planning.
- SuperClubs compete in global super leagues to sustain fan interest, which creates a growing tension with environmental issues.
- SuperClubs deploy AI to scour the globe for talent.

How we got here

- Financial volatility drives investor syndicates to sports clubs. Creating a wealth of resources to fund exclusive SuperClub media platforms.
- With increasing power and reach, Superclubs create that Player contracts fluctuate depending on performance, requiring enhanced salary cap management, Players cede their media rights to clubs.
- Technology advances in media capture, playercasting and "God views" become part of the SuperClub Tech stack. SuperClubs become sought-after employment opportunities for developers, working on bespoke eco-systems.

Role of the Sports rights holders

- Media rights are intrinsically tied to Superclubs. The Direct-to-Consumer model and tech advances negate the need for broadcast companies and cable providers.
- With an assured exclusivity of media rights for each club, Superclubs will control the sports media landscape and the nature and composition of competitions.
- In a closed and controlled eco-system, the Superclub determines the technology stack and the roadmap for future upgrades. Superclub off-seasons are now akin to Silicon Valley Developer events, as they announce versions and upgrades.

Implications for Women's & New entry sports

- In this scenario, SuperClubs control the media spotlight. Direct to consumer models restrict the visibility of the breadth of sports. Women's sports remain largely ignored, until the emergence of Women Investor syndicates.
- For those fans who are excluded from walled media gardens and recurring revenue bundles, they may turn to lower-quality, authentic fan casts of women's sports. This plants the seed for future disruptions to SuperClubs.

Acting Forces - Drivers & Trends

Primary Trends & Drivers			
Globalization	Increasing Health Awareness	Unreal Game Engine	Reformation Generation
Tech Disruption of Media	Entertain Me Year Round	Armchair QB Enters Virtual Arena	Women Designed Professional Sports
Generational Change	Athletes as Brands	Sports Venue as Media Platform	
Increase in Leisure Time	The Female Web	World Wide Sports	
Financial Volatility	ESports are Watchable Sports	Sparing Cost of Sports Media Rights Threatens Cable	
Data Collection & Media Rights	Broadcast Blues	Alternative Economies	

Drivers Social Technological Economic Values

3. Strategies

The fulcrum of success for ACFC in each scenario is fan attention at scale that can be leveraged to behaviours that support a team economically. The more consistent and reliable and widespread that fan attention is, the greater the ability of the team to achieve its aim. These observations informed the development of emergent strategies

To develop recommendations supporting ACFC’s goal, we identified strategies that would be effective in each scenario individually. We then conducted a wind-tunnelling exercise to evaluate the potential impact of each strategy as high, medium, or low across each scenario world.

STRATEGY	BetterVerse	Player Power	SuperFan	SuperClub	APPROACH
integrated nutrition and wellness approaches to player training	h	h	h	h	ROBUST
innovation lab - player technologies	h	h	h	h	ROBUST
investment in technologies to monitor player performance and recovery	h	h	h	h	ROBUST
capture fans who don't consume traditional sports media	h	h	h	h	ROBUST
extend partnerships across a wider ecosystem	h	h	h	m	ROBUST
Rundle - adaptable to different fan segments, personalized	h	h	m	h	ROBUST
financially accessible tiered levels of membership	h	h	h	h	ROBUST
support player business ventures	h	h	m	m	FLEXIBLE
players media platform training to increase individual player audiences	h	h	m	m	FLEXIBLE
include player audience as a scouting and trading criteria	h	h	m	m	FLEXIBLE
bring in retired players and figures that interest fans	h	h	m	m	FLEXIBLE
ACFC Train with Me - player platform training programs	h	h	m	m	FLEXIBLE
focus on solutions for systemic issues e.g. health insurance	h	m	m	h	FLEXIBLE
ventures team looking into portfolios/streams lining up to values	h	m	m	h	FLEXIBLE
soccer academy becomes purpose academy	h	h	m	m	FLEXIBLE
develop new forms of media i.e. player casting	h	h	m	m	FLEXIBLE
galvanize players around specific social innovation initiatives	h	h	l	m	GAMBLE
social innovation lab	h	m	l	h	GAMBLE
immersive digital platform for global fans	h	m	l	h	GAMBLE
ACFC lifestyle network	h	m	l	h	GAMBLE

Figure 6. Emerging strategies were evaluated as high, medium, or low impact in the conditions of each scenario .

Analysis of the emergent strategies uncovered four strategic focus areas: fan engagement, player investment, audience expansion, and social impact. These areas operate as themes to collect emerging strategies into five strategic recommendations. (As seen in Figure 7).

Robust strategies, high impact across all worlds:

- The Angel Rundle: a recurring revenue subscription bundle of services offering fluid fans a chance to select content and services that match their individual preferences. Fixed fans may subscribe for unlimited access to all services.
- Player Destination: Be the team players want to join by supporting players beyond their on-the-field activities with a holistic approach to player support
- Train with Me: a digital fitness experience that features the healthy lifestyles of Angel city's top

players. This is a unique opportunity to both promote player platforms to and connect with a fixed and fluid fan

Two gambling strategies have high impact in two worlds, these strategies are relevant to the current conditions of ACFC's environment and, if implemented, would provide ACFC with significant advantage in terms of building a global and loyal audience.

- Social Innovation Lab: a commitment to the social innovation lab, vaults ACFC beyond their current 10% sponsorship agreement, to gain reputation and audience growth by doubling down on their early commitment to social essentials, equity and education.
- AngelVerse Immersive Crowd: a redesign of the game day experience bringing in virtual fans from around the globe through immersive 3d technologies.






		STRATEGIC FOCUS AREAS			
		FAN ENGAGEMENT	PLAYER INVESTMENT	AUDIENCE EXPANSION	SOCIAL IMPACT
STRATEGIES	 ANGEL RUNDLE	✓		✓	✓
	 PLAYER DESTINATION	✓		✓	✓
	 TRAIN WITH ME	✓	✓	✓	✓
	 IMMERSIVE CROWD	✓		✓	✓
	 SOCIAL INNOVATION LAB	✓	✓	✓	✓

Figure 7. Emerging strategies were evaluated as high, medium, or low impact in the conditions of each scenario .

4. Observations & Insights

Angel City must continue to monitor the following signals to best determine how to managing their ongoing strategies, to evaluate when to act, and when to pivot:

For Fan engagement, ACFC must track developments in technology and monitor the willingness of leagues to offer shared ownership models.

In the area of Player Investment ACFC must be aware of the ratio of fan engagement on player platforms compared to ACFC's own platforms engagement rates.

In terms of audience expansion, when considering player acquisitions, Angel city may consider more than the on-field presence of their players, including the ability to grow an audience as part of a reimagined scouting report. The reach of retired players may also be key for audience engagement.

In the area of Social Impact ACFC must continue to scan for opportunities to partner with institutional organizations addressing systemic sources of inequity at a local, national, or global scale. ACFC must be open to inquiries from other sports and leagues for assistance in setting up similar purpose + profit models. ACFC must monitor player platforms that achieve significant impact in areas of interest to ACFC.

As we conducted this exploration of The Possible Futures of Sports Media we uncovered consistent implications for Angel City Football Club across the four

described scenarios. Strategies recommended in this report address these implications but in themselves, will not resolve them. These implications are ongoing elements within the environment. ACFC must take these factors into account as they embark on all of their media and fan engagement initiatives:

- Increasingly, fans follow players, not teams. This provides the potential for attracting new fan audiences by bringing new players to the Angel city roster. However, Angel city must be aware of the team relevance to fans.
- Diffused media offers extended reach into a broader media ecosystem but may be frustrating for fans without way-finding support and personalization
- Partnership may speed the development of immersive experiences while also spreading risk and cost of technical innovation yet reduce the exclusivity and unique quality of the ACFC fan experience.
- A direct-to-consumer media structure provides independence from networks yet requires in-house capability and fixed fan loyalty at scale.