

CONTENT IS QUEEN

HOW WOMEN'S SPORT HAS PUT DIGITAL FIRST

The rising demand for video content has changed the game for rights holders promoting women's sports. Here's what you can learn from their innovative digital-first approach.



FOREWORD

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365 million live viewers.
453.3 million social
interactions.
590,000 new followers.

Those are just a few of the statistics shared by UEFA, illustrating the success of UEFA Women's EURO 2022. The tournament was shown worldwide via more than 60 broadcast partners, becoming the most-watched Women's EURO ever. The final between England and Germany is estimated to have drawn in a cumulative live viewership of 50 million people, three times more than the 2017 final (15 million).

Even before the EURO 2022 finals, women's sport had reached a turning point, with both fan interest and media attention reaching unprecedented levels. Its continued growth is a result of a conscious effort to employ a digital-first strategy and provides the ideal roadmap for successfully engaging fans, growing audiences and raising the profile of your sport.

Imagen teamed up with SportsPro to explore what sports professionals working within women's sport see as the key drivers fuelling this dramatic growth. We've updated our 2019 research in this new report, looking at the experiences of 204 senior industry professionals in women's sports.

The survey indicates that respondents are taking steps to own the distribution of their sports content, with 43% planning to launch their own direct-to-consumer (DTC) streaming product in the future. The ever-increasing use of over-the-top and DTC digital platforms inevitably raises the question of content. As more content is created, organisations will be required to effectively manage and access growing content libraries across multiple territories.

Cloud-based technology has made this a possibility. It makes storage, access and delivery affordable for any size organisation and enables rights holders to easily manage and repurpose content for various formats.

Don't just take our word for it. Interviews with Marzena Bogdanowicz at The English Football Association, Clare Briegal at the International Netball Federation and Rebecca Smith at Copa90, will give you an insider's perspective. They reveal how a rights holder, a federation and a media platform are utilising a variety of digital media to meet audience demands for women's sport and grow their fan base.

It can't be denied that 2022 was a pivotal year for women's sports. Yet there is a way to go. As traditional channels continue to underserve fans, sports federations and rights holders will need to continue utilising digital media to satisfy the demand for women's sports. This whitepaper can hopefully serve as a guide to creating and implementing your own digital-first strategy.

INTRODUCTION

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As extra time ticked away and penalties loomed in the UEFA Women's Euro 2022 Final, England's Chloe Kelly poked the ball into the Germany net to send over 87,000 fans inside Wembley Stadium wild. It was Kelly's first international goal.

The goal won England their first-ever European title, something the men's team have not been able to manage. "Honestly it's amazing," Chloe Kelly said in an interview after the final whistle. "This is what dreams are made of. As a young girl watching women's football, this is amazing."

That day was another landmark moment for women's sport, the culmination of a decade of high profile sporting successes. The London Olympics in 2012 was the first time in the long history of the Games when all participating countries included female athletes. Team USA in 2012 had more female athletes than male athletes.

In 2017, England Women beat India by nine runs to win the ICC Women's Cricket World Cup final, ending a tournament that had broken records by every measure – from global viewing hours, to attendances, to print and online coverage.

Women's sport is beginning to bridge the gap with more commercially developed men's properties. With interest and engagement among fans still on the rise, more digital content is being produced and consumed than ever before. This, in turn, is encouraging sports organisations and media outlets to provide wider access to content, thereby fostering broader appeal and stoking further demand.

ABOUT THIS SURVEY

This whitepaper explores the relationship between technological trends and consumer behaviour to understand the rise and future outlook for women's sports. To support this, SportsPro and Imagen surveyed 318 senior sports industry executives, 204 of whom are operating within women's sports at federations, leagues, teams, broadcasters, media organisations and agencies across the world.

The online survey, conducted throughout August 2019, took the form of a quantitative and qualitative questionnaire, with respondents asked for their views on the current market for women's sports content, how and why sports consumption is changing, and what the future holds from an investment perspective.



WOMEN'S SPORT IS DIGITAL-FIRST

Digital media has been at the heart of the growth of women's sport to date, but it will have an even more important role to play in shaping its future. The evolution of technology has removed barriers that previously prevented women's sports properties from connecting with existing and potential audiences, creating an environment in which female athletes are now enjoying unprecedented exposure and popularity.

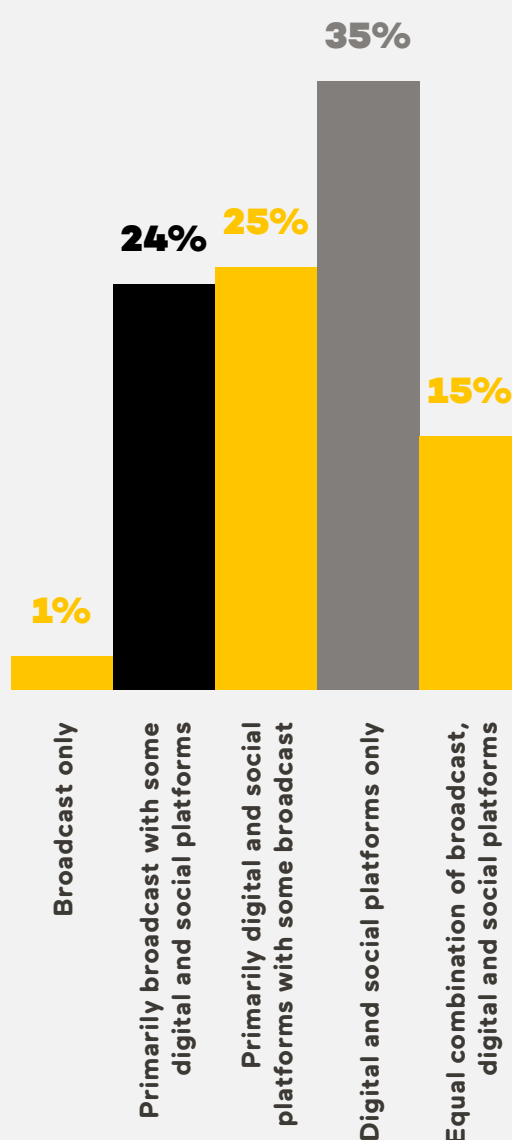
Sports consumption, in general, is now digital. At a time when sports fans are consuming more media content through social media and an array of over-the-top (OTT) platforms, rights holders have more avenues to market at their disposal than ever before. OTT platforms like DAZN, Amazon and FloSports are now acquiring live rights to a range of premium and emerging sports, while many rights holders are building their own streaming services, such as The FA's recently launched FA Player.

This changing media landscape, coupled with evolving consumption trends, explains why organisations large and small are taking a digital-first approach when it comes to devising a content distribution strategy for men's and women's sport. In our survey, **35% of respondents indicated that their entire women's sport output is distributed exclusively via OTT platforms and social media**, while a further quarter said they primarily release content across OTT platforms and social media, complemented by some broadcast distribution. In total, **62% of respondents said they expect more of their women's sports content will be distributed via OTT platforms and social media in future**.

For example, new OTT streaming venture Women's Sport Network launched in November 2022. It is meeting the demand for a more streamlined viewing experience from fans and is supported

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HOW DOES YOUR TOTAL WOMEN'S SPORTS CONTENT OUTPUT BREAK DOWN ACROSS BROADCAST (INCLUDING BOTH FTA AND PAY-TV), DIGITAL AND SOCIAL PLATFORMS?



Source: Content is Queen, Digital lessons from women's sport; Imagen & SportsPro; Survey results, August 2019



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by 12 professional women's sports leagues and federations. These include: the WNBA, LPGA, UK Ski & Snowboard, and Athletes Unlimited.

Rising online consumption has naturally meant that OTT platforms and social media are fuelling most interest and engagement among women's sports audiences. **More than half (52%) of all respondents said they are seeing most interest and engagement with women's sports content on social media, while a further 23% said streaming services are driving most interest and engagement.** Similarly, a third of respondents cited 'new opportunities for digital distribution' as the number one factor that has enabled their organisation to cater to increasing audience demand for women's sport in recent times.

This trend towards digital distribution and consumption is catching the attention of brand marketers. **Notably, 37% of respondents cited 'increased commercial interest' as the number one factor enabling them to meet rising demand** – a figure which illustrates the important role

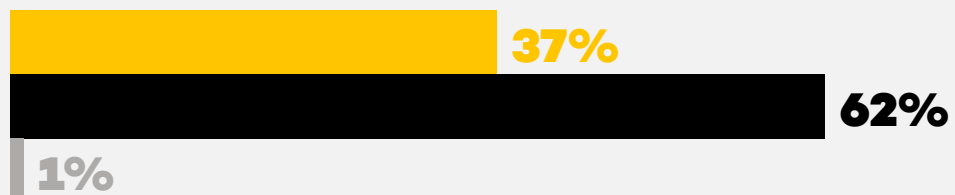
corporate sponsors will play in driving the growth of women's sport in future.

Payments giant Visa, for example, matched its marketing spend from the 2018 FIFA World Cup for the women's equivalent in 2019 and spent much of that budget on a content series lifting the lid on the inspiring backstories behind players competing at the tournament. Visa continued its investment in women's sport by sponsoring UEFA Women's EURO 2022, running a campaign championing female-led businesses.

Women's sport has broken into the mainstream conversation through social media. While levels of interaction across the various networks may vary, these platforms are helping women's sports leagues and individual female athletes to accumulate hundreds of thousands of social media followers. Distributing more content through these channels will continue to promote female athletes, boost their profiles, and uncover untold, socially relevant stories that offer compelling narratives and opportunities for sponsor integration.

IN YOUR VIEW, HOW DO YOU EXPECT THE PORTION OF WOMEN'S SPORT CONTENT DISTRIBUTED ACROSS BROADCAST, DIGITAL AND SOCIAL PLATFORMS TO CHANGE OVER TIME?

More broadcast
More digital and social platforms
No change



Source: Content is Queen, Digital lessons from women's sport; Imagen & SportsPro; Survey results; August 2019

IN FOCUS: NET GAINS



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For International Netball Federation (INF) Chief Executive **Clare Briegal**, there have typically been three obstacles to creating and distributing women's sports content: expertise, capacity and cost. However, netball is one sport that has found innovative ways to gain visibility across an array of platforms.

Briegal points to the 2019 Netball World Cup as a prime example of how both broadcasters and rights holders can maximise the reach of their content. In the UK, the tournament was covered by the BBC and pay-TV giant Sky Sports, which opted to stream the competition for free on video-sharing platform YouTube.

In 2021, Sky Sports announced a multi-year broadcast partnership with England Netball – the biggest media partnership in its history. The deal saw every match of the Vitality Netball Superleague (VNSL) 2021 season broadcast across Sky Sports and England Netball platforms, increasing visibility and bringing fans closer to the sport than ever before.

In markets where the INF did not find a broadcast partner for the 2019 tournament, **the governing body launched its own free global OTT platform and app to ensure netball fans around the world were able to watch the action.**

"We sold the international broadcast rights, so we had a partner, Lagardère, on board with that," Briegal explains. "They sold into certain key territories, but in those dark markets where there was no sensible commercial margin, if you like, we then had our mobile phone app which was the OTT service, so that was the streaming product."

"That was a strategic view. We need some income, which is significant for netball in those key territories, but we want to grow the audience size, and we want to make sure that those netballers

around the world that are living in a non-netball country can have access to the games."

Beyond World Cups, though, when there is typically less interest from broadcasters outside of netball's strongholds, the INF has sought to ensure that its events are reaching as wide an audience as possible. For the 2017 Netball World Youth Cup in Botswana, for example, **Briegal reveals that the INF worked with Botswana Television to stream the entire tournament on Facebook, securing "millions and millions of eyeballs" for an under-21 event.**

Going forward, Briegal expects that strategy to remain the same.

"I think so," she says when asked whether the INF will continue to make extensive use of digital and social distribution. "Our audience, the majority are female, and they're of the right age group, so these are people that are using their mobile phones a lot – they're not necessarily sitting down and consuming sport in front of a television, so it fits our demographic to use."

And that opportunity – to engage a huge audience at a low cost – is one that other women's sports should take advantage of.

"The barriers to entry for digital are so much lower that there will be more, and more sports doing it and at a lower level," Clare Briegal declares. "So, not just international, but at the national and regional level."

"Certainly, from a netball perspective, more leagues consider live streaming. Even if they are not professional leagues, they have the ability to actually live stream, to do it on Facebook. It's easy, you can do it from a mobile phone. You can do an awful lot without too much investment these days if you're going to broadcast through YouTube or through Facebook."

SIZING UP THE AUDIENCE

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It is a common misconception that only female fans watch women's sport. A 2021 report by Sky Sports and Leaders in Sport found that almost a quarter of men (24%) said they followed more women's sport than they did 18 months ago. It aligns with research from the Women's Sport Trust (WST), which revealed that 2022 was the most watched Q1 for women's sport on record in the UK with 17.9 million people tuning in.

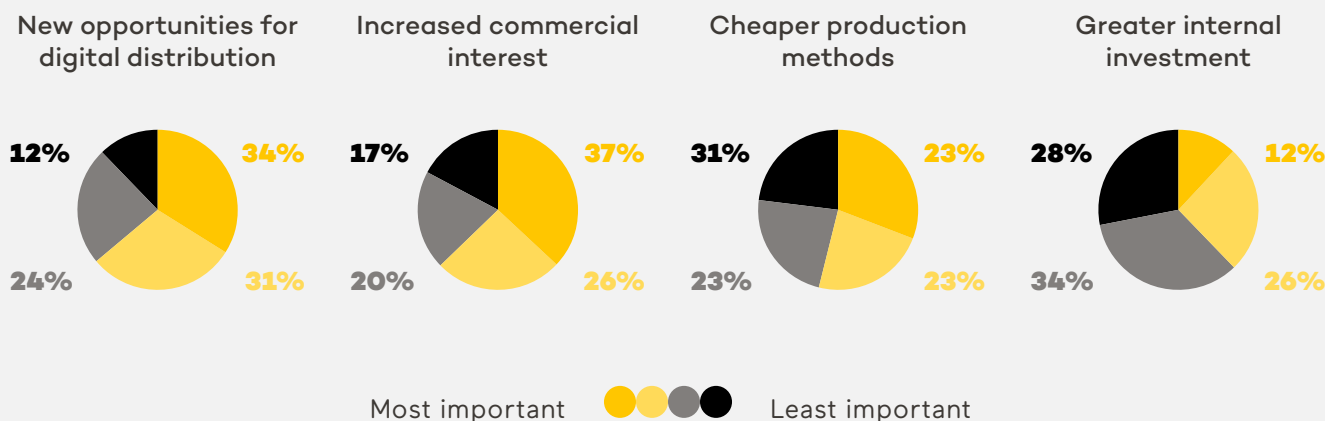
"The success of the Women's Euros shows that if broadcasters are prepared to showcase women's sport properly, both in terms of volume of coverage and prime time slots, audiences will respond in huge numbers and keep coming back for more," said Tammy Parlour, WST chief executive and co-founder.

And there is an obvious opportunity to extend the reach of women's leagues and competitions by providing a variety of viewing options. This is supported by insight from GlobalWebIndex, which recently found that while women's sports are still predominantly being watched on TV (80%), almost half of the fans watching on TV are also choosing to watch online.

This is perhaps a reflection of the youthful, digitally savvy nature of the women's sports audience, which generally chooses to stream sporting events online and on mobile devices. According to Sky Sports, Vitality Netball Superleague streams on its YouTube channel attract an audience that is 74% female and 26% male, with the majority of viewers aged between 25 and 34 years old.



WHAT HAS MADE THE BIGGEST DIFFERENCE TO YOUR ABILITY TO RESPOND TO AN INCREASE IN AUDIENCE DEMAND FOR WOMEN'S SPORT? RATE THE IMPORTANCE OF EACH FACTOR.



Source: Content is Queen, Digital lessons from women's sport;
Imagen & SportsPro; Survey results; August 2019

CONTENT RULES

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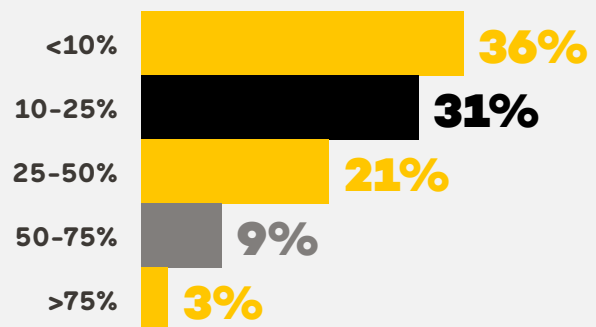
Time spent viewing video content online is rising. According to Publicis Media agency Zenith, consumers globally spent an average of 100 minutes each day watching online video in 2021, up from an average of 84 minutes in 2019.

In the battle for attention, compelling video content is an important differentiator that serves multiple functions. For rights holders, content can be used to achieve various objectives, such as growing participation, inspiring younger

generations, increasing athlete exposure, boosting sponsorship revenue, bolstering the value of media rights, and broadening reach and engagement among new markets and audiences.

It is with these objectives in mind that, across sport, overall investment in content is on the rise. **In our survey, 78% of all respondents said their total investment in content production has increased in the past three years.** Meanwhile, audience demand for women's sports content is growing all the time.

WHAT PORTION OF YOUR OVERALL INVESTMENT IN CONTENT IS CURRENTLY CHANNELLED TOWARDS WOMEN'S SPORT?



Source: Content is Queen, Digital lessons from women's sport; Imagen & SportsPro; Survey results; August 2019



The sports industry's current failure to match supply with demand is corroborated by the findings of our survey. **Nearly 88% of the 204 respondents who indicated that they work in women's sport currently channel less than half of their total content budget towards women's sport. 66% invest less than a quarter and nearly 35% allocate less than 10%. In fact, only 3.5% of the organisations surveyed spend more than 75% of their total content budget on women's sport.**

One reason for this used to be a perceived lack of interest in women's sport, both internally, within organisations themselves, and externally, among consumers. According to a study by the University of Southern California and Purdue University, only 5% of all traditional sports media coverage is focused on women's sports.

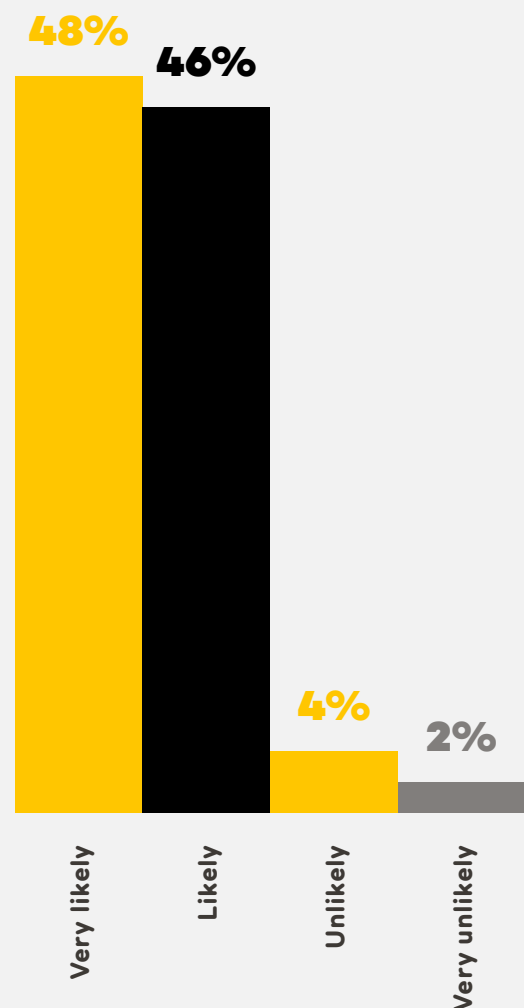
Asked what the biggest obstacles have typically been to creating and distributing women's sports content, one respondent wrote 'lack of internal interest/focus and budget', while another replied 'lack of audience interest.' The latter certainly isn't true. According to the the Women's Sport Trust (WST), UK broadcast audiences for women's sport have doubled from 2021 to 2022 with 57% watching on 3+ occasions compared to 26% in 2021.

Respondents signalled that they expect overall investment in the creation, production and distribution of women's sports content to grow in the future and the popularity of the UEFA Women's EURO 2022 tournament has certainly reinforced that assumption. Tellingly, **some 94% of respondents indicated that they are either likely or very likely to increase their investment in content tailored towards women's sport and female athletes over time.**

94%

of respondents are likely or very likely to increase their investment in women's sports content.

HOW LIKELY ARE YOU TO INCREASE YOUR INVESTMENT IN THE CREATION, PRODUCTION AND DISTRIBUTION OF CONTENT TAILORED TOWARDS WOMEN'S SPORT AND FEMALE ATHLETES OVER TIME?



Source: Content is Queen, Digital lessons from women's sport; Imagen & SportsPro; Survey results, August 2019

IN FOCUS: NO COPPING OUT

COPA90

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Digital media brand Copa90 signalled its intent to produce more women's soccer content with the appointment of **Rebecca Smith** as its first Global Executive Director of the Women's Game.

Smith pointed out that there have been "multiple challenges" that have prevented the widespread creation and distribution of women's football content, but placed a lack of investment at the heart of the issue.

"I think number one is that there have been decision-makers who decided that there's no audience for the women's game and so make ill-informed decisions about women's football," Smith said in 2019. "It's always an afterthought, so women's football has never been part of the definition of football, and that's where we completely want to change that.

"We have to break through that cycle, and you have to look at the women's game like a startup. You have to properly invest and put a strategy behind it and proper resources, and I'm not just talking about money; I mean the right people, the right brains, and figure out how you're going to properly invest in it and get a long-term return back from it."

Copa90 did just that during the 2019 FIFA Women's World Cup, where around 80% of the company's coverage was focused on the competition in France, shining a light on players that hadn't been afforded mainstream visibility.

And while a publisher like Copa90 might not have had the rights to live games, its influence in the digital world – the company boasts 1.8 million YouTube subscribers – meant it was able to build the profile of female soccer players by posting non-live content across various online platforms.

Copa90 continued producing content for the UEFA Women's EURO 2022 tournament, partnering with Visa for Player of the Match awards. With a unique approach that invited unsung heroes of women's football to present the awards, the campaign drove awareness of Visa's support for the women's game, racking up 8.2 million views and 155,000 engagements. Copa90 also produced a matchday show on Snapchat (Goals Talk) and filmed host city guides for TikTok.

Given the positive engagement and response to its EURO 2022 coverage, it is unsurprising to find that Copa90 considers this only the beginning of the company's mission to help grow the game.

"With the women's game," Paolo Nieddu, Copa90's Global Head of Strategy told Campaign Magazine, "it's more interesting for brands as it's an opportunity to innovate – you don't have to copy what the men's game has done... If you're a foundational brand and you're here now, in the future you are going to reap the benefits."

There have been several turning points for women's sport, but it could be argued that the UEFA Women's EURO 2022 tournament has given brands the confidence to know that there is a real and growing demand for women's sport, particularly amongst young audiences. Women's football is football. That simple fact can't be ignored any longer.



ALL HANDS ON TECH

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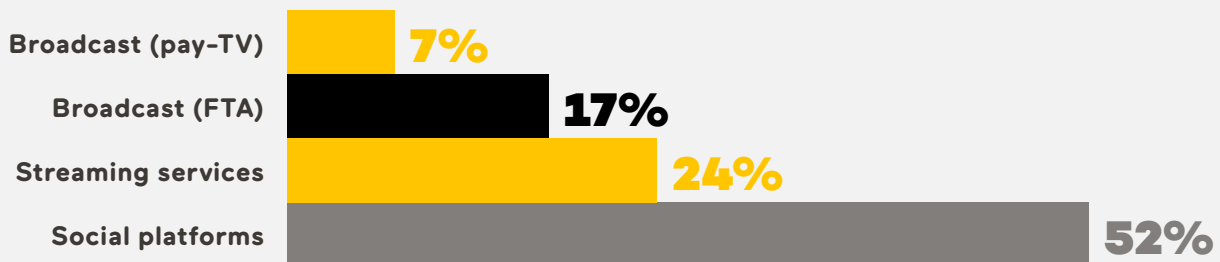
The changing nature of media consumption is helping to fuel the growth of women's sport. The emergence of new online platforms, such as social media networks and rights holder-owned streaming services, and the introduction of more efficient production methods, have made it easier and more affordable than ever to deliver content directly to audiences around the world.

Direct-to-consumer (DTC) content delivery is becoming cheaper, faster and more reliable thanks to advanced streaming technology and cloud-based management tools while streaming services and social media platforms offer previously unavailable means of distribution. As such, more and more rights holders in sport are investing in building out full-scale OTT strategies, including creating standalone video streaming services, in order to reach and better serve their audiences.

According to NAGRA, the Kudelski Group-owned pay-TV and OTT solutions provider, nearly half of all new rights holder-owned platforms to have hit the market were launched in the past two years – a statistic which underlines the rapid growth seen in the OTT sports sector. More offerings are set to launch in future as a growing number of sports properties take advantage of this newly democratised media landscape and favourable market conditions.

The Australian Football League's (AFL) women's competition, for example, receives domestic pay-TV and free-to-air coverage, but the league also streams every game for free across its website and mobile app. Consequently, since the league debuted in 2017 it is estimated that 41% of Australians have become interested in women's Australian rules football.

ON WHICH PLATFORMS ARE YOU SEEING MOST INTEREST AND ENGAGEMENT IN WOMEN'S SPORT CONTENT?



Source: Content is Queen, Digital lessons from women's sport; Imagen & SportsPro; Survey results; August 2019

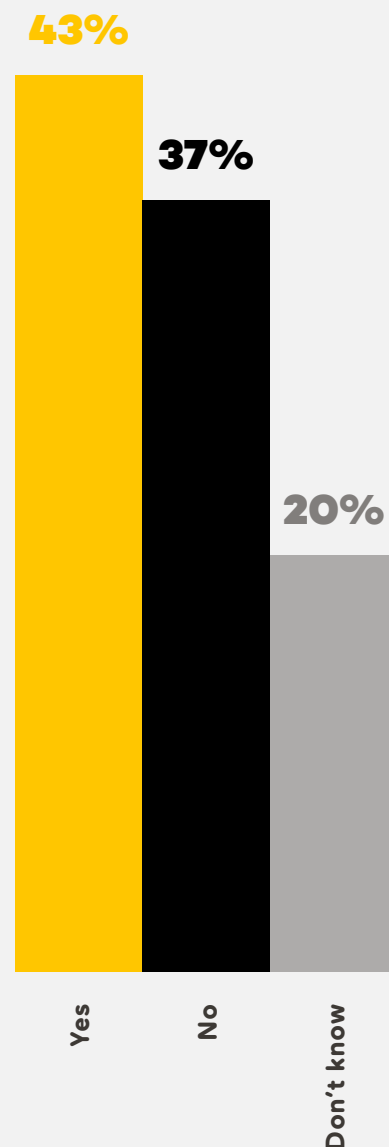
Elsewhere, UEFA.TV, the European soccer body's first DTC streaming platform, shows live coverage of its women's competitions, such as the Women's Champions League. Since its launch, the platform has landed a deal to show matches from the Liga Iberdrola, the top tier of women's soccer in Spain. Prior to that, UEFA had set up the Together #WePlayStrong platform across major social media channels, supported by high-profile players including Megan Rapinoe, Pernille Harder and Lucy Bronze. The #WePlayStrong YouTube channel, dedicated to showcasing women's football, has garnered over 34 million views since 2017.

The English FA also has its own OTT service, dubbed The FA Player (see page 13). Here, you can live stream all Women's Super League, Women's Championship, FA Cup and League Cup matches, as well as watch match replays, highlights and feature content.

DTC services such as these are now operating alongside larger media corporations. DAZN, for example, has the rights to live stream the UEFA Women's Champions League from the group stage onwards; Sky Sports streamed the 2022 Women's Cricket World Cup.

Women's and emerging sports can continue to take advantage of low-cost production technologies to develop their own platforms that house more content and offer more streaming hours of live games than ever before. By ensuring wider exposure, sports organisations are able to generate audiences and interest that might not have otherwise been possible, which can encourage broadcasters and media companies to pay for rights to that content in future.

**IS YOUR ORGANISATION
INVESTING, OR PLANNING TO
INVEST, IN THE LAUNCH OF A
DEDICATED DIRECT-TO-CONSUMER
(DTC) STREAMING PRODUCT?**



Source: Content is Queen, Digital lessons from women's sport; Imagen & SportsPro; Survey results; August 2019



IN FOCUS: INSIDE THE FA PLAYER



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Back in 2019, the English Football Association (FA) announced the launch of The FA Player. Free to use and available online via a website or a dedicated mobile app, the service gives viewers unprecedented live access to domestic women's football fixtures throughout the season. For the 2022/23 season, that includes 132 live matches from the Women's Super League.

Since the rollout, the WSL has secured its first-ever overseas broadcast rights deal with Sky Mexico and Scandinavian network NENT. The three-year agreement, which is worth a six-figure sum, gives the top tier of women's soccer in England coverage across Mexico, Central America, the Dominican Republic, Norway, Sweden, Finland and Denmark.

Here, **Marzena Bogdanowicz**, The FA's Head of Marketing and Commercial, women's football, explains how the governing body is evolving its content strategy to capitalise on the rising popularity of its women's properties.

In your view, what have typically been the biggest obstacles to creating and distributing women's football content?

Lack of awareness has probably been the key one on distribution, alongside an understanding and appreciation of the quality. The Women's World Cup, specifically the positioning of the Lionesses and the work we have recently done on the Barclays FAWSL brand have helped hugely in raising the credibility of the women's game and showing the players as talented and professional.

How has the FA's investment in women's football content evolved over the past three years?

Every year we look at how we can evolve our content, how we position the content and we always look to improve. The FA Player is probably the biggest step we have made to date and has been very positively received.

What potential is there for the FA to increase its revenue generated from women's football content in the future?

We have announced two overseas broadcast agreements, which demonstrates there is clearly an appetite for the Barclays FAWSL abroad.

What was behind the FA's decision to invest in its own OTT platform dedicated to women's football?

This is a pivotal and significant step in The FA's journey to grow the women's game and attract new audiences. We know people want to watch football in different ways, with content that's quickly and easily accessible.

Would you say the return on investment for money spent on women's sport is more or less when compared to men's sport? Where do you see more potential for incremental growth coming from in future?

We do not compare against the men's game, the women's game provides different opportunities and these would be measured against any partner's objectives. There is real growth potential in women's football. We are only at the start of the journey and the last 12 months have shown how the new impetus can help grow the game, its profile and also the commercial value that it brings.



BRIDGING THE GAP

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While rights holders are taking a digital-first approach to distributing women's sports content, there remain clear opportunities to capitalise on the broad and established reach of traditional linear channels.

In our survey, **a quarter of respondents indicated that their total women's sport output is distributed primarily through broadcast networks. Interestingly, 37% said that they expect their output across broadcast to increase over time – even as digital platforms are driving content consumption.**

Current industry trends support this finding. In an increasingly competitive rights marketplace, traditional broadcasters, particularly free-to-air (FTA) networks, are seeking non-premium content and other programming that is generally cheaper to purchase and produce. That includes women's sport, which, while traditionally underserved, now presents broadcasters with a real opportunity to attract new audiences. Indeed, many outlets now recognise that relatively insubstantial investment can yield notable results, such as impressive ratings and viewership.

In the summer of 2022, for instance, the BBC saw record audiences tune in for its coverage of UEFA Women's EURO 2022 as a TV audience of 17.4 million watched its coverage on TV with 5.9 million streams of the game on the BBC iPlayer and the BBC Sport website and app.

Other broadcasters have seen similar success. DAZN revealed that its coverage of the UEFA Women's Champions League for the 2021/22 season attracted 64 million views on DAZN and its UWCL YouTube channel. The last three months of the season saw in excess of 12.3 million unique viewers tuning in to watch the knockout round fixtures. The broadcaster has since inked a five year deal with La Liga Profesional de Fútbol Femenino to broadcast the Primera División Femenina, Spain's top women's football league.

With audience appetite and ratings on the rise, broadcasters are responding by making programming decisions designed to address the historic gender imbalance. UK pay-TV channel Sky Sports has committed to showing the Vitality Netball International Series and Superleague in a multi-year deal, while ESPN reportedly pays the Women's National Basketball Association \$25 million a year for broadcast rights. The 2021 season saw a 49% viewership rise from 2020.

Beyond live, too, broadcasters are looking to grow their women's sports audience by maximising their content output across digital. For instance, the BBC's live coverage of the UEFA Women's EUROs was supported by short-form video highlights published shortly after every game on its website and official YouTube channel. Similarly, Sky Sports posted free highlights on its website throughout the Women's Ashes and Women's Cricket World Cup in New Zealand.

By making the most of digital, broadcasters can amplify the reach of their women's sports content to attract untapped audiences while simultaneously meeting the needs of mainstream viewers on their traditional channels.



HOW TO EMPLOY A DIGITAL-FIRST STRATEGY

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A FIVE-STEP GUIDE

01

Meet audiences on their terms

Distribute content through platforms on which your fans are most engaged. Your distribution strategy should use a mix of social media, broadcast and OTT services. Remember to consider your existing rights contracts and implement a strategy to serve content to fans in dark markets.

02

Personalise the user experience

Ensure the right content is shared with the right audiences by monitoring user data and delivering content according to each user's personal behaviour and preferences.

03

Tailor content to specific platforms

While broadcast platforms offer unrivalled reach, digital and social platforms are proven to generate high levels of engagement. Content should be tailored accordingly. Non-live programming such as snackable, short-form clips are effective tools for driving interaction on social media, amplifying reach and guiding digital audiences towards the live action.

04

Mix up your monetisation strategy

No sports property has the same level of profile and popularity across all markets; pricing and access to content should vary in different territories. Ensure the broadest reach possible by employing a mix of free, ad-supported and premium subscription-based products. Factor in opportunities to integrate sponsor promotions, branded content and other features that facilitate indirect monetisation.

05

Ensure content supply chains meet demand

Storing, managing and sharing content to various distributor platforms needs to be handled efficiently in order to satisfy demand. Support investments in high-quality content production with a cloud-based content management tool that enables the provision of that content to multiple clients at speed.

Cloud-based media asset management platforms like Imagen, allow sports federations, leagues and even individual teams to store and share live and on-demand footage online themselves. This enables content owners to realise greater value from their content, to strike better partnership deals, and ultimately better serve an engaged, tech-savvy fan base that is disillusioned with traditional TV.



CONCLUSION

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For all the progress that has been achieved in recent times, the industry is finally catching on to the popularity of women's sport. Impressive attendances and TV ratings around major events are tangible evidence that fan appetite is also growing, and key broadcasters are keen to tap into the women's sports fanbase.

As this popularity grows, sports organisations and broadcasters will have to find new ways to engage with fans of women's sports all year round. A lack of interest and visibility have often been cited as the

main barriers to progress. But times have changed. The proliferation of online platforms and more advanced streaming technology, coupled with rising content consumption and audience engagement, is fuelling greater interest and investment in women's sport across the board, creating new commercial opportunities for rights holders.

And therein lies the opportunity for content owners: to be the catalyst for a virtuous circle that will ensure women's sport captures a greater share of the spotlight in the future.

THE IMAGEN VIEW

Having worked with a number of sports organisations including the Premier League, WTA and IMG Replay, Imagen has witnessed a number of changes within the industry.

By any measure, 2022 was a significant year for women's sport in terms of exposure, viewership and growth. Crucially, younger, digitally-savvy audiences are helping to fuel this rise. Changes in viewing habits mean they are not relying on broadcasters to air the content they want to watch on TV, evidenced by the 185.9 million video views for UEFA Women's Euro 2022 (over 30 times more than the 2017 tournament).

Sports consumption has become digital, with more sports fans choosing to stream sporting events on their digital devices. It follows, therefore, that the sports federations and organisations that will win in this day and age will undoubtedly be the ones that adopt a truly digital-first strategy. This is particularly true of women's sports, which are

coming of age at a time when consumers are free to bypass traditional TV networks and platforms.

To satisfy and capitalise on evolving audience demand for women's sports, sports federations, governing bodies, leagues and clubs need to ensure they can create and distribute content to media channels in order to meet demand. This can be achieved with the right cloud-based media asset management tools, which enable content owners to store, share and distribute content to various broadcaster platforms at speed.



ABOUT IMAGEN

Imagen is an intelligent cloud-based media asset management platform that enables sports organisations to manage and distribute their video media with enhanced functionality, control and insight. Used by sports organisations around the world, Imagen enables them to unlock the value of their expanding video and media libraries with a highly customisable platform.

Key features include:

SECURE STORAGE Automated workflows upload and archive your content quickly. It only takes a few clicks to ingest and transcode multiple files.

ACCELERATED FILE DOWNLOADS Deliver high-resolution files to broadcasters and media partners in seconds.

POWERFUL CATALOGUING Add rich metadata quickly with Imagen's cataloguing and shotlisting tools. Artificial intelligence features generate rich searchable metadata.

LIVE TO ARCHIVE Live ingest content, archive, or clip and publish incoming streams in real-time.

AUDIENCE ANALYTICS Drive user engagement and improve ROI across your archive with simple to use dashboards.

GET IN TOUCH

To discuss your video management and distribution requirements, please contact us and one of the team will be in touch.

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