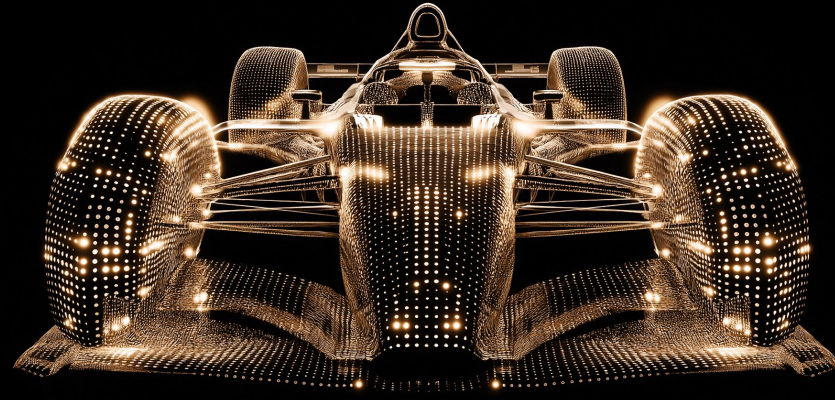


Data, AI and Cybersecurity Consulting

Together,
we're enabling new digital
revenues in sport



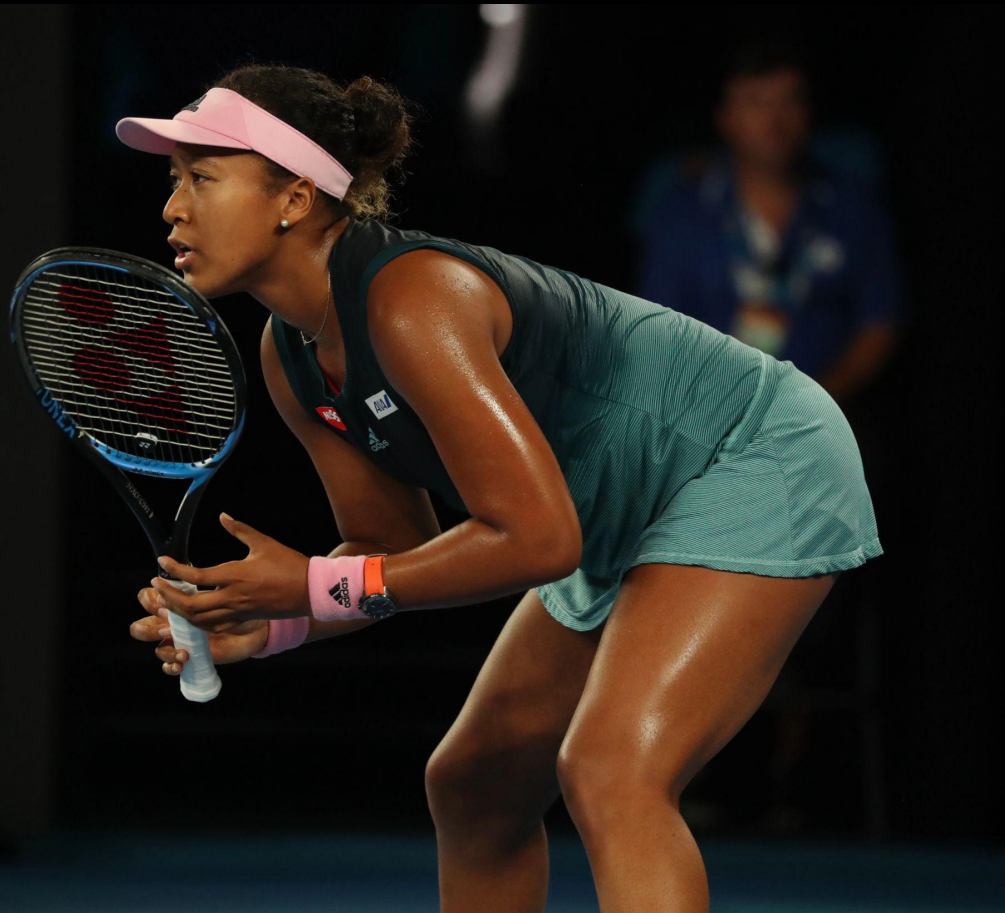
Sport is rapidly embracing digital, data and AI, to win on and off the field, despite digital vulnerabilities and unprecedented cybersecurity risks



Business leaders need a greater understanding of the value realisation impact of data, AI and cybersecurity, to enable informed decisions on investment and risk priorities in their sports ecosystem.

Cloud, Data and AI impact all areas of the sports ecosystem

Competitive pressure is rapidly increasing



- ★ New digital revenue streams
- ★ **Hyper-personalised digital fan engagements**
- ★ Real-time, immersive streaming experiences
- ★ **Connected, digitally interactive smart venues**
- ★ Sport is now a digital, personalised entertainment business
- ★ Gen Z and Alpha sports fans expect instant, 'sound-bite' sporting experiences.

Monetisation growth is not yet realised

Europe is at an inflexion point where media rights ceases to be the primary revenue growth driver

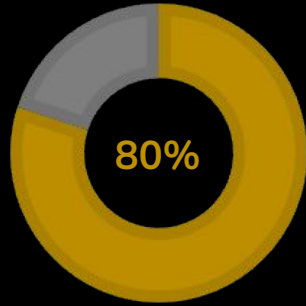


- ★ Only 2% of sports rights holders expect media rights to deliver significant revenue growth in the near term in UK ^[1]
- ★ Data-driven digital offerings and ecosystem partnerships emerge as potential new levers for growth
- ★ **88% of UK sports organisations do not have a data strategy integrated into their business decision making ^[1]**
- ★ Value creation remains elusive due to lack of data, AI and cybersecurity expertise
- ★ **50% of UK sports properties commercialise less than 10% of their known audience ^[1]**
- ★ Sports properties and media broadcasters need to become data centric organisations to compete in an increasingly crowded global sports marketplace
- ★ **'Secure data-at-scale' will be paramount to even enter the race.**

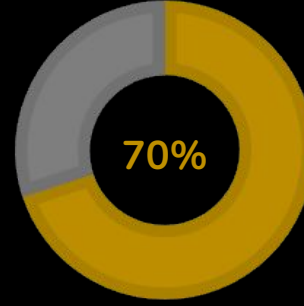
[1] Only 2% of UK sports properties expecting major media rights growth in next five years - SportsPro (sportspromedia.com)

Smart Stadiums & Personalized Sports Broadcasting Intensifies

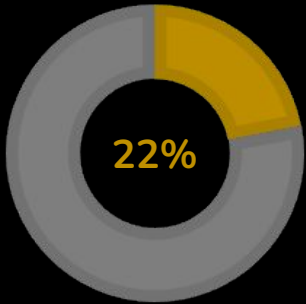
Powered by 5G private networks and a shift to AI-threat prevention



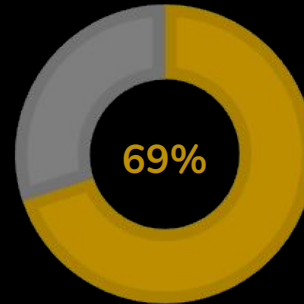
of Gen Z & Millennials want to watch replays or live games from different camera angles on their mobile device **whilst at live stadium sporting events** [2]



of sports executives view diversifying content offerings beyond live events, enhancing live media experiences, and customising content as **crucial strategies to boost deeper fan engagement** [3]



global growth forecast for **digitally connected sports venues** (CAGR '22-'27) [4]



of security leaders expect AI to significantly enhance threat detection and response capabilities, with **37% rating AI as a total game changer** [5]

[2] In-stadium experience | Deloitte Insights

[3] 2023 Global Sports Survey | Altman Solon

[4] Latest Global Smart Stadium Market Size/Share Worth USD

[5] Opportunity with every insight (kpmg.com)

Today's disruptive digital shift is taking the C-suite into 'uncharted territory'

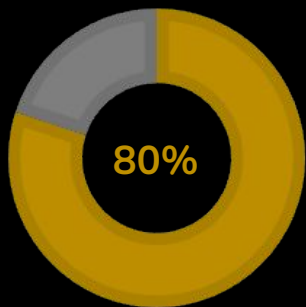
Digital headwinds threaten growth and increase business risk



- ★ Digital, AI / data and network cybersecurity expertise amongst C-level executives is key for success
- ★ **Only 30% of sporting organisations have robust digital strategies** [6]
- ★ Talent gaps across data science, AI and cybersecurity are a serious issue
- ★ Data governance is in its infancy
- ★ **Only 5% of organisations have an enterprise-wide Secure Access Service Edge (SASE) Strategy** [7]

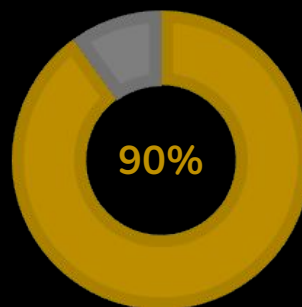
Cloud is the dominant attack vector for the cybercriminals

Supply chain risk in the sports value chain will continue to intensify as a critical business exposure



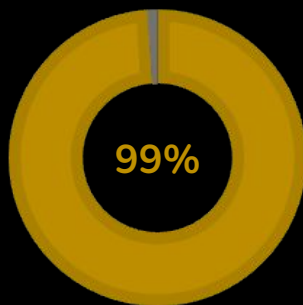
of data breaches are occurring on cloud assets in 2024.

Cloud-native vulnerabilities are a major concern [8]



of CEOs are worried their organisation will be a victim to a catastrophic cyber attack by 2025.

CEO concerns are increasing [9]



of Global 2000 companies are directly connected to a breached vendor in their supply chain.

Similar exposures are likely for sporting entities [10]

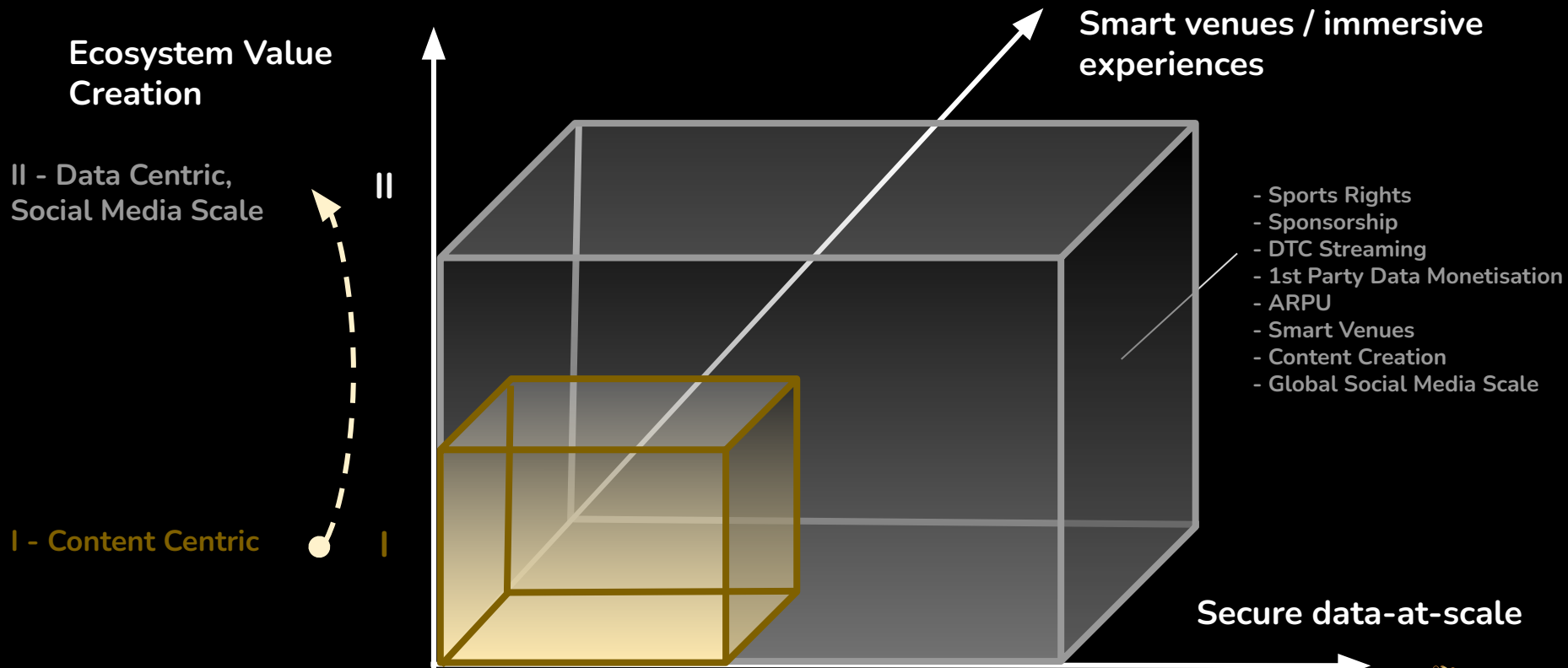
[8] PaloAlto Unit 42 Cloud Threat Report, Volume 7: Navigating the Expanding Attack Surface (paloaltonetworks.com)

[9] David Andrew: The SASE-powered C-suite

[10] 99% of Global 2000 Companies Directly Connected to a Supply Chain Breach - SecurityScorecard

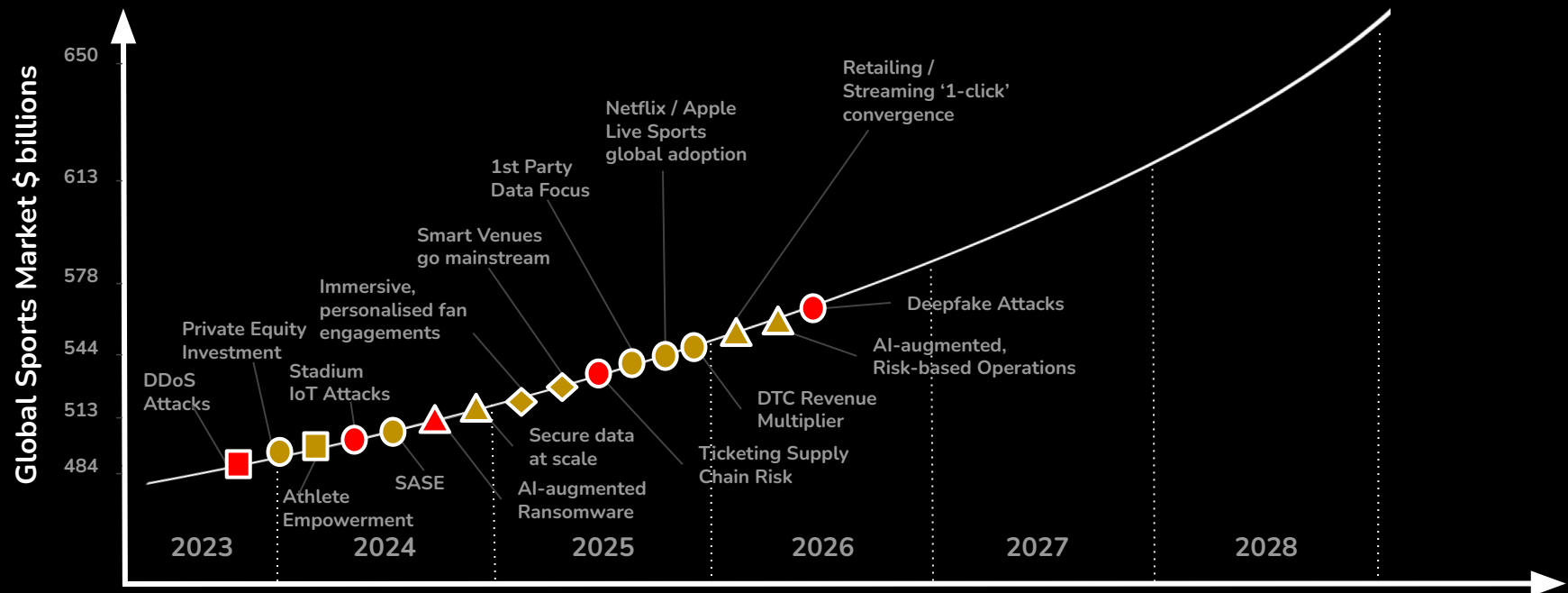
Value Creation for Data Centric Sports Properties

Reimagining digital fan engagements built on secure data-at-scale



Market dynamics impacting global sports market growth

Secure data & AI maturity will be fundamental to profitable growth



Maturity reached:

△ Less than 1 year ○ 1 - 2 years ◇ 3 - 4 years □ Plateau

Key: ● ENABLER ● CYBER THREAT

Data-AI-Cybersecurity market dynamics

Data & AI LLM security become non-negotiable for sports leaders

Key:  Disruptive Sports Drivers





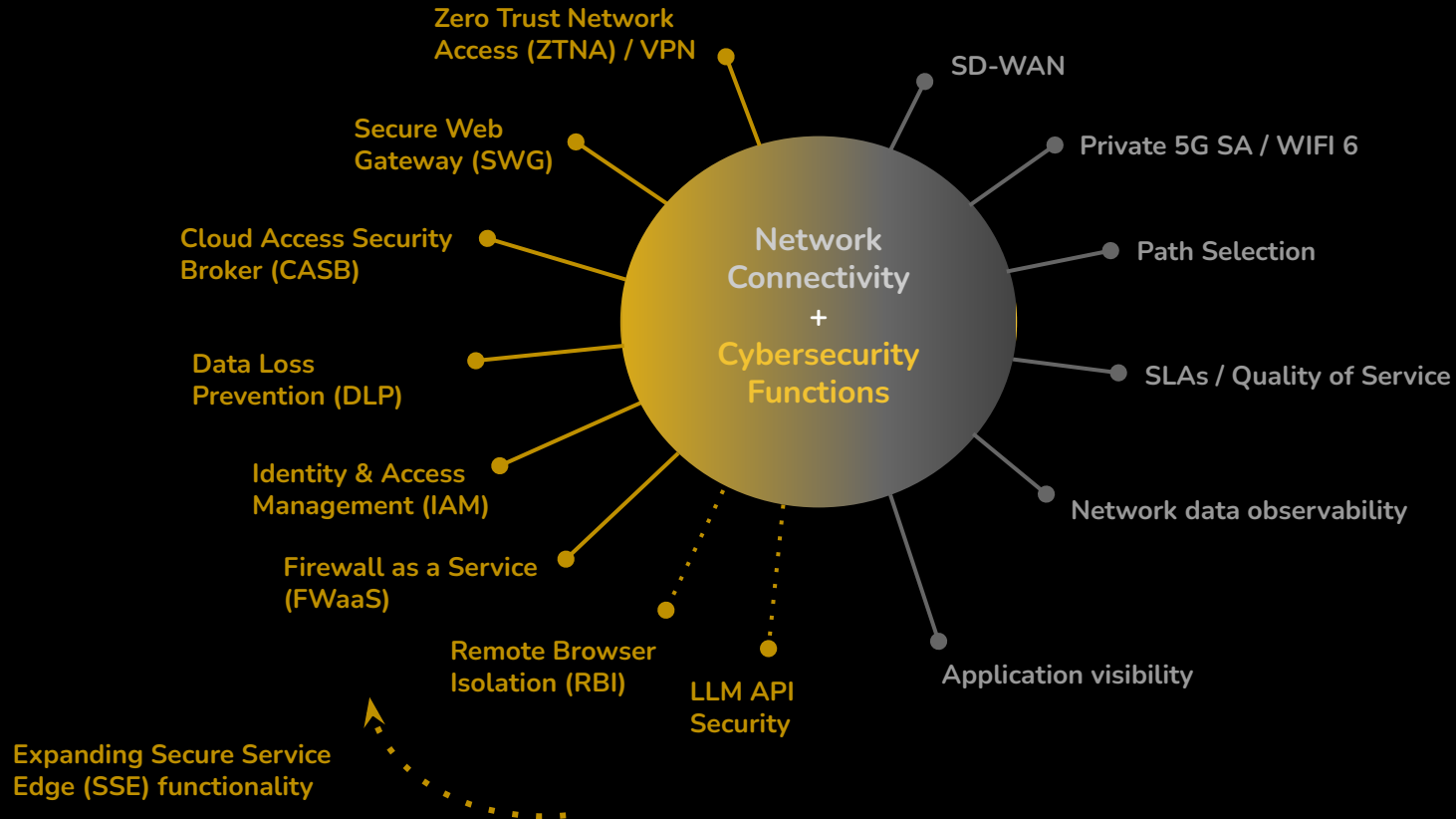
Digital hyper-personalisation and AI-augmented fan experiences are key for business growth

Without an effective SASE strategy, a robust network cybersecurity posture, to secure and enable 'data at scale' across the platform ecosystem, is not prioritised.

This creates significant risk exposure and inhibits growth for sporting entities.

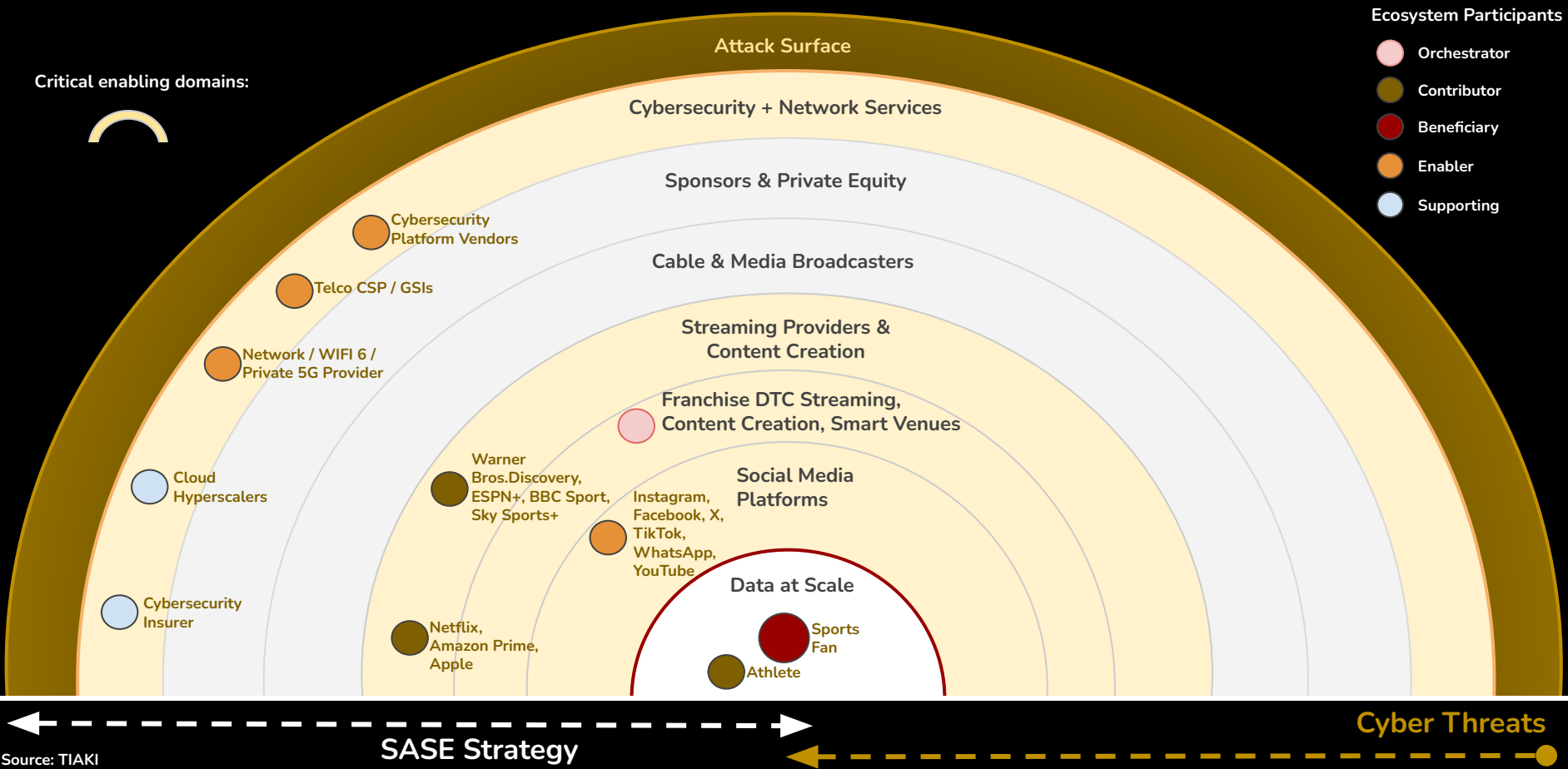
So what is Secure Access Service Edge (SASE)?

Convergence of Network Connectivity and Cybersecurity



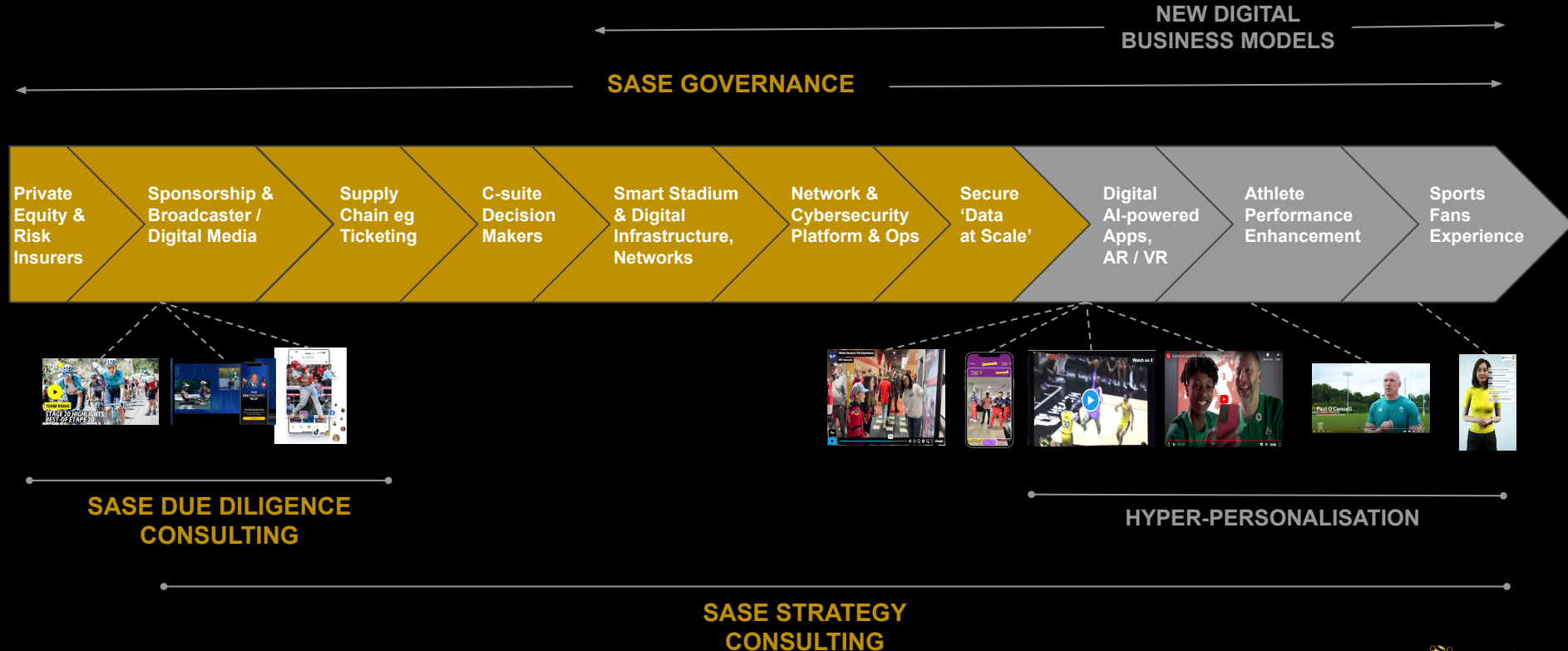
The Data-centric sports property

SASE enables all ecosystem participants to deliver value creation securely



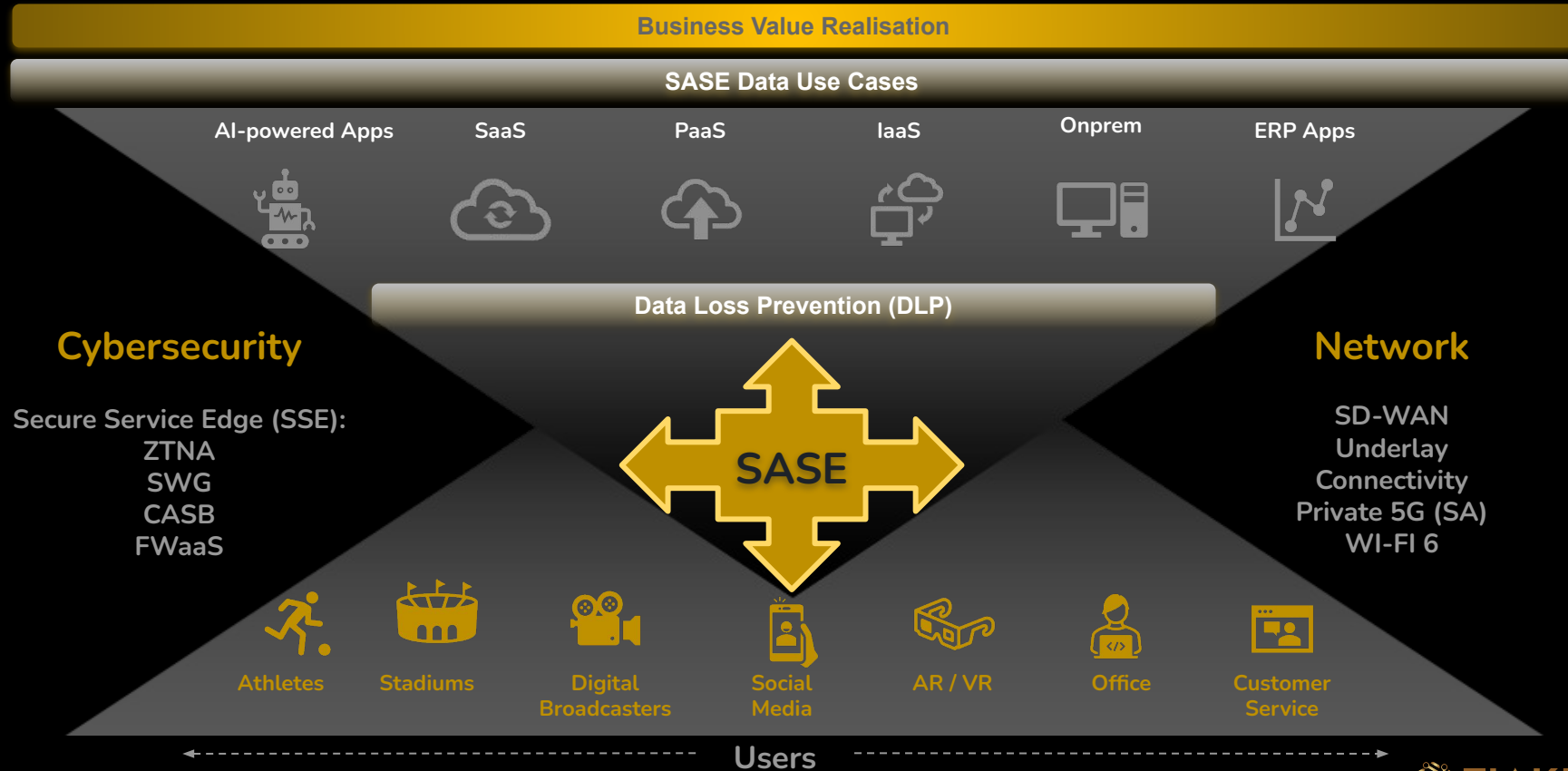
Sporting Industry SASE Value Chain

SASE is foundational to securely scale & enable new digital business models but is not yet prioritized, creating risk and inhibiting value



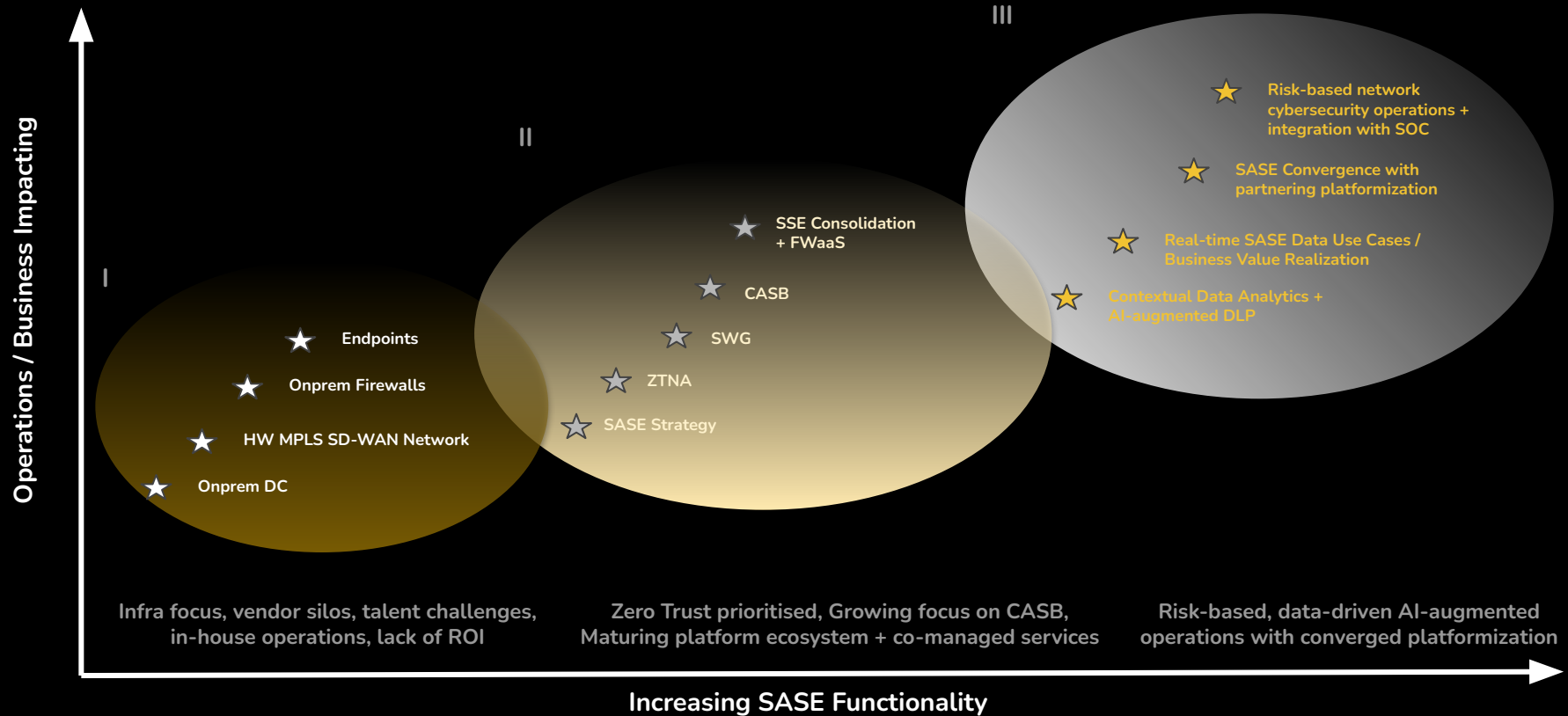
Secure Access Service Edge (SASE)

Provides the foundation for securing the digital agenda at scale



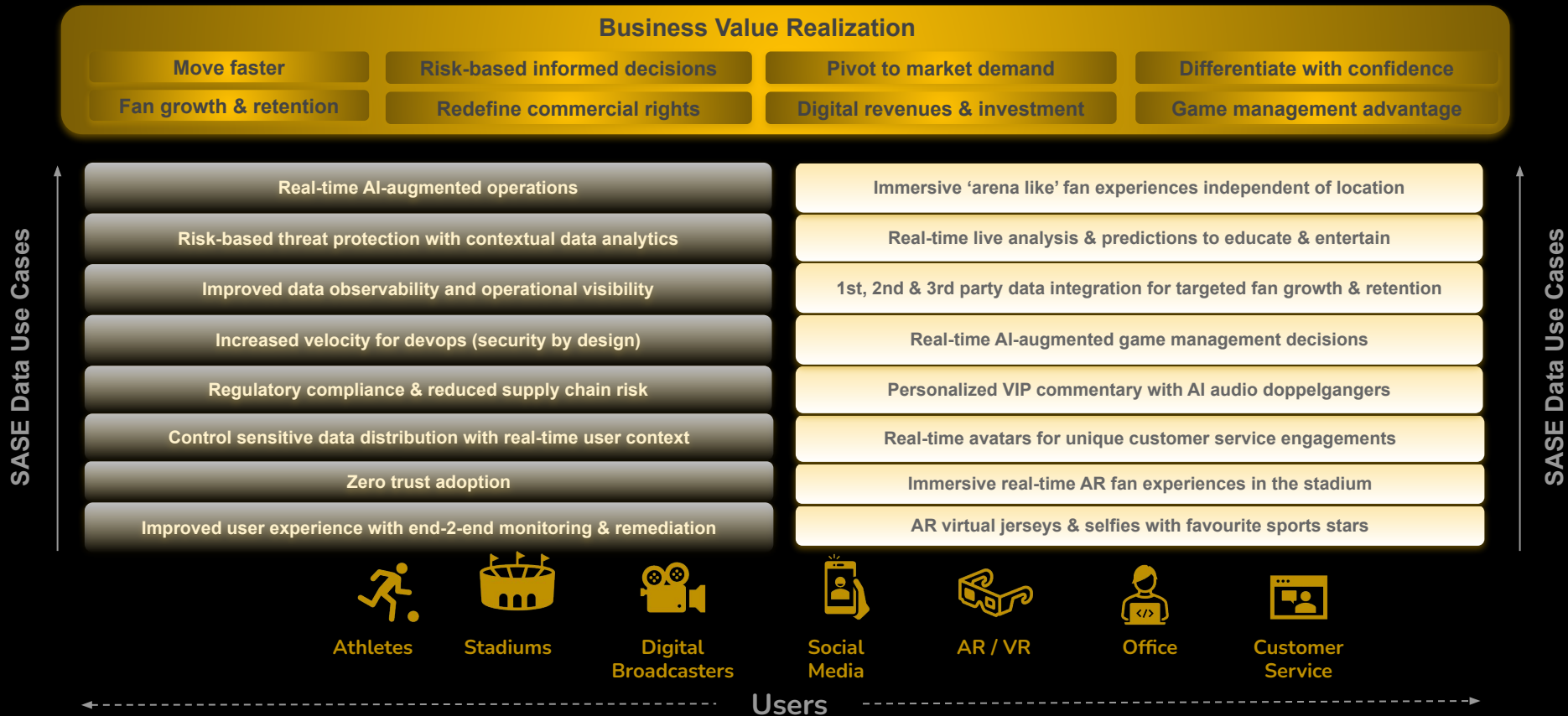
Market Shift to SASE Convergence

Maturity map to real-time, risk-based network cybersecurity operations



How SASE becomes the ultimate business enabler

Through embedding a strong security culture foundation across the sports organization



Our Consulting Approach

Connecting the dots across the entire digital sports industry value chain



- ★ Our consultants work alongside your team
- ★ We offer flexible engagement models
- ★ **We bring unique insights and accelerators to boards, business leaders, investors, data pioneers and cybersecurity leadership teams in sport**
- ★ As your trusted advisors, we seek to fully understand your business objectives and the unique risks that you're facing every day
- ★ **We help your team co-shape the strategic roadmap to provide risk-based resiliency to enable secure digital revenue growth at scale**
- ★ Our guidance provides 'peace of mind' to the C-suite, investors and operational teams.

SASE Strategy Consulting Framework for the C-suite

Business Alignment, Current State Maturity, Target State, Business Value Realization, SASE Uses Cases & your Transformation Journey

I - Current State Maturity & Business Alignment

- ★ MPLS / SDWAN / 5G networks
- ★ SSE Cybersecurity posture
- ★ Vendor silos
- ★ Gaps in the attack surface
- ★ SaaS asset management
- ★ Existing Zero Trust, SWG, CASB maturity
- ★ Risk Management
- ★ Cloud deployments
- ★ TCO base case, contract / refresh lifecycles

II - Target State, SASE Use Cases & Transformation Path

- ★ Align Business Strategy / Data Strategy with SASE Target State ambition and risk-based adoption appetite
- ★ Target State functional requirements
- ★ SASE architecture
- ★ In-house vs Co-managed Services
- ★ Impact Analysis for AI-augmented operations
- ★ Cloud-native ecosystem partnership options
- ★ Identify SASE Use Cases for quick wins

III - SASE Strategy, ROI, Business Value Realization

- ★ Business alignment to SASE Target State
- ★ Business prioritization input to SASE Strategy
- ★ Business Case modelling for transformation roadmap options
- ★ Business value realization criteria for SASE Use Cases
- ★ Risk mitigation for transformation and steady state operations

TIAKI bring deep expertise from our personal journeys at



salesforce



pwc



Business

Orange
Cyberdefense



ORACLE



LLOYDS BANK

... which shapes our digital, data, AI and cybersecurity consulting insights in the global sports ecosystem.



About the Author:

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David is the Founder & Managing Partner at TIAKI, where he collaborates with bold and determined leaders in the sports ecosystem to define their data, AI and cybersecurity strategies to deliver sustainable value.

TIAKI is a niche consulting practice helping executive leadership in sport make confident, informed decisions on their risks, investments and business outcomes powered by secure 'data-at-scale'.

TIAKI empowers CEOs, management teams, broadcasters and investors in the global sports industry with strategic advisory frameworks to deliver secure, pioneering digital fan experiences and new ecosystem business models to achieve breakthrough returns.

David has over 20 years of strategy and technology enabled business transformation experience, providing consulting expertise in cloud native technologies, data strategy, digital business enablement and cybersecurity strategy. He is passionate about helping talented leadership teams succeed in securely growing their differentiated business models in the data-driven, digital sports economy.

Based in Stockholm, David previously worked for IBM Consulting, EY, Accenture Strategy and Orange Business. He studied Chemistry at Durham University and holds an MBA from Trinity College, Dublin Business School.

