BLOG REPORT

Sports Broadcasting in the Age of Fragmentation and Immersive Experiences

TIAKI

The unstoppable juggernaut: the unprecedented appetite for sports

The numbers don't lie. The 2025 Super Bowl shattered global viewership records, boasting an astounding 185 million+ viewers. This figure, while monumental, pales in comparison to the consistent draw of the Liverpool vs. Manchester United clash, which regularly commands an audience exceeding 370 million globally per game.

These figures underscore a fundamental truth: sports are more popular than ever. The global appetite for live sports is insatiable, transcending geographical boundaries and cultural differences. From the roar of the stadium to the intimacy of the living room, sports provide a shared experience that unites millions.

However, beneath this veneer of unparalleled popularity lies a rapidly evolving landscape fraught with both opportunities and existential threats for traditional sports broadcasters. The golden age of linear television, where sports rights were a guaranteed revenue stream, is fading. In its place, a fragmented ecosystem is emerging, driven by the rise of streaming, direct-to-consumer (DTC) offerings, and the insatiable ambition of big tech.
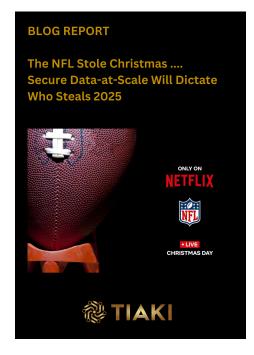
The fragmentation challenge and the data goldmine

The core challenge facing traditional sports broadcasters is fragmentation. The once monolithic broadcast rights are being splintered, with sports properties increasingly opting for DTC models. Leagues and teams are building their own streaming platforms, cutting out the middleman and capturing a larger share of the revenue. This shift is compounded by the burgeoning streaming landscape, where a plethora of platforms compete for viewer attention.

This fragmentation, while disruptive, also presents a unique opportunity: the opportunity to leverage the vast amounts of first-party data accumulated over decades. Sports broadcasters possess a goldmine of information about their viewers, including viewing habits, demographics, and preferences. However, this data remains largely untapped. The current approach is often one-dimensional, relying primarily on subscription fees as the primary revenue driver.

The lack of a robust, data-centric strategy is a critical oversight. Sports broadcasters need to move beyond simply broadcasting live events and begin personalizing the viewing experience. By leveraging data analytics and AI, broadcasters can tailor content recommendations, offer personalized viewing options, and create targeted marketing campaigns. This personalized approach can significantly enhance viewer engagement and loyalty, fostering deeper relationships with fans.

The big tech threat and the revenue squeeze

The threat from big tech platforms like Amazon Prime, Netflix, and Apple is real and growing. These tech giants possess the financial muscle and technological prowess to disrupt the sports broadcasting landscape. Amazon's foray into live sports, particularly with Thursday Night Football, demonstrates their ambition. Apple's acquisition of MLS rights further solidifies their commitment to sports content. Netflix, while not yet a major player in live sports, is rapidly expanding its sports documentary and behind-the-scenes content, further encroaching on the traditional sports narrative. Targeted live sports events such as NFL on Christmas Day is likely to be Netflix approach in the next 12 months.

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BLOG REPORT

**The NFL Stole Christmas ….
Secure Data-at-Scale Will Dictate
Who Steals 2025**

Our thought leadership article: [The NFL Stole Christmas ….. Secure Data-at-Scale Will Dictate Who Steals 2025 - TIAKI](#) , highlights the Netflix Christmas gamble and the broader data dilemma facing the sports industry.

The Blog Report explores how the NFL's Netflix experiment fits into the broader context of the sports industry's struggle for global growth and fan engagement. We delve into the critical role of secure data-at-scale, and how a comprehensive SASE (Secure Access Service Edge) and data strategy, championed by franchise C-suites, is essential for long-term success. Furthermore, we will emphasize the need for a broader, interconnected data ecosystem that extends beyond any single platform, such as Netflix, to truly deliver on the evolving expectations of global sports fans..

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The recent loss of the NBA rights by Warner Bros.Discovery to a combination of incumbents and new streaming entrants highlights the intense competition and the financial pressures facing traditional broadcasters. The escalating costs of sports rights, coupled with the decline of linear television viewership, is squeezing profit margins. This pressure is forcing broadcasters to rethink their business models and explore new revenue streams.

Existing Installed Base Global Customer Numbers (Approximate):

- **ESPN (Disney):** Estimated to have over 100 million global households reached via linear and digital platforms.
- **Warner Bros. Discovery:** Reaches hundreds of millions of households globally through its various networks and streaming services.
- **Fox Sports:** Reaches hundreds of millions globally, primarily in North America and Australia.
- **Sky Sports (Comcast):** Reaches tens of millions of households across Europe, particularly in the UK and Ireland.

Immersive experiences and the customer lifetime value (CLV) approach

The future of sports broadcasting lies in immersive experiences. Digital immersive technologies, such as augmented reality (AR), virtual reality (VR), and mixed reality (MR), are rapidly maturing and becoming more accessible to consumers. With a vast installed base of viewers and robust data infrastructure, sports broadcasters are uniquely positioned to leverage these technologies.

Imagine a scenario where viewers can experience a live game from multiple camera angles, access real-time player statistics, or even interact with virtual overlays that provide additional insights and analysis. This level of engagement can transform the viewing experience from passive consumption to active participation.

The potential for revenue generation is immense. A 1% conversion rate from a large installed base to fee-paying immersive apps could generate substantial incremental revenue. For example, if a broadcaster with 100 million users could achieve a 1% conversion rate for a $10 immersive app, that would translate to $10 million in revenue.
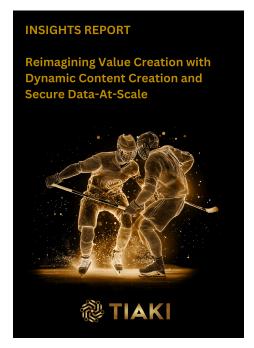
To fully capitalize on these opportunities, sports broadcasters must adopt a customer lifetime value (CLV) approach. This means focusing on building long-term relationships with viewers and maximizing the value generated over the entire customer lifecycle. Instead of solely focusing on subscription fees, broadcasters should explore a broader portfolio of revenue streams, including:

- Microtransactions for immersive experiences and digital collectibles.
- Personalized advertising based on viewer preferences.
- E-commerce partnerships for merchandise and related products.
- Data-driven insights and analytics services for sports teams and advertisers.

Data, AI and cybersecurity: the foundation for success

The success of any immersive strategy hinges on a robust foundation of data, AI, and cybersecurity. Data analytics is essential for understanding viewer preferences and personalizing the viewing experience. AI can be used to create intelligent content recommendations, automate content creation, and detect fraudulent activity.

Cybersecurity is paramount in the digital age. Sports broadcasters must protect their data and infrastructure from cyberattacks. This includes implementing robust security measures, conducting regular security audits, and educating employees about cybersecurity best practices.

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INSIGHTS REPORT

Reimagining Value Creation with Dynamic Content Creation and Secure Data-At-Scale

Our thought leadership article: " [Reimagining value creation in the global sports ecosystem with dynamic content creation and secure data-at-scale - TIAKI](), reinforces the importance of secure data management and dynamic content creation.

In today's fragmented landscape, broadcasters need to be agile and adaptable, creating content that resonates with diverse audiences. This requires a data-driven approach that allows broadcasters to understand viewer preferences and tailor content accordingly. Secure data management is also critical for building trust with viewers and protecting sensitive information.

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Reimagining the game: sports broadcasting's immersive evolution.

In conclusion, sports broadcasting is at a critical juncture. While the demand for live sports remains strong, the industry is facing unprecedented challenges. By embracing data-centric strategies, leveraging immersive technologies, and adopting a CLV approach, sports broadcasters can not only survive but thrive in the evolving digital landscape. The key is to transform from mere broadcasters to experience providers, creating engaging and personalized experiences that resonate with the global audience. The future belongs to those who can harness the power of data, technology, and innovation to deliver the ultimate sports viewing experience.

About the Author:

David Andrew
Founder & Managing Partner
www.tiaki.ai
david.andrew@tiaki.ai

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

David's vision for TIAKI is to empower sports franchise CEOs, leadership teams, sports media 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.