

**Sports  
Innovation  
Lab**

The  
**Top 25**

**Most Innovative**

**Teams In The World**

The Path Forward for the World's Most Innovative  
Sports, Media, and Entertainment Organizations



# The Age Of The Fluid Fan

## The Age Of The Fluid Fan.

We built Sports Innovation Lab with one powerful realization: that the sports fan was changing and the industry needed to change to keep up with this savvy consumer.

In January of 2020, we published our groundbreaking research announcing to the world that we believe these new fans, who we call Fluid Fans™ have arrived. In this report, called [The Fluid Fan is Here](#), we described these new fans and how they are the path to growth for the industry. We used the emergence of the Fluid Fan as a call to action for the industry to start operating differently.

Over the past 4 years, we studied the sports industry and have argued that sports was entering a New Age of Sport with additional research that provided evidence that the Fluid Fan is open to change, empowered to choose, and continuously evolving. In our report, [The Rise of Athlete Driven Media](#), we demonstrated how the Fluid Fan's desire to engage directly with the athletes they love on new direct-to-consumer platforms would tip the balance of power in media distribution and merchandise sales. In our next report, [Designing Breakthrough Fan Experiences](#) we described how Fluid Fans will attend live sporting events by showing up early, staying late, and visiting mixed-use venues even when no games are being played.

In [The Future of Watching Sports](#) we looked at how social viewing and interactivity will change the traditional linear broadcast experiences and require new production and distribution strategies. We ended 2020 by calling on brands to take a data-driven sponsorship approach when working with sports properties. We described how data-driven sponsorships can help lead sports organizations to collect first party data so they could learn about their customers' desires and expectations.



This body of foundational and groundbreaking research allowed Sports Innovation Lab to see patterns across not only the fan, but also across some of the most successful sports organizations. The examples and case studies we wrote about weren't selected randomly. These case studies were surfaced through rigorous analysis of data. We observed how some sports organizations prepared for the future by leading, taking risks, and shaking up the status quo.

In conjunction with feedback from experts across the industry and through numerous Leadership Board meetings, customer interactions, and many conversations with the broader market, we honed a method for collecting and measuring innovation across sports. This report describes our approach.

To conduct this analysis, we focused on teams from the top 10 revenue grossing leagues in the world. The results are powerful. For the first time, the industry has an objective, data-driven perspective on which teams and properties are focused on the new fan, the Fluid Fan. We are proud to officially name and rank the most innovative sports properties in the business.

# 2020:

## A Year Like No Other

### A Defining Moment.

In a normal year, the research Sports Innovation Lab publishes is used to provoke leaders to ask important questions about their products, services, organizations, and partnerships... 2020 was by no measure a normal year.

A global pandemic hit the sports industry and the world with tremendous force in March, and we were shocked when the largest properties shut down operations and furloughed staff. Leadership teams immediately shifted priorities and started looking for answers.

**The most innovative organizations weathered the storm the best. These organizations had several things in common:**

- 1 They had expanded **revenue opportunities** beyond traditional broadcast and gate revenue sources. They had already thought beyond “game day” revenue opportunities.
- 2 They had **organizational agility** with skills that reached beyond traditional back office sponsorship sales and event management. Their teams had experience with different business models -- often in various geographies - - and this led them to take on challenges instead of simply cut costs.
- 3 They had invested and aligned with **digital technologies** that support emerging fan behaviors and were in a position to deliver new media experiences without live games on linear broadcast.

In this research, we move from making recommendations to delivering this imperative: Sports must prepare for the Fluid Fan. The harsh reality for the sports industry was here faster than any of us thought possible. This report showcases what’s being done well in the face of our new reality and gives new urgency to the opportunity to prepare for the future, to innovate, and to grow again. I encourage you to do what I’ve always done in my career: take risks, be bold, and create what you want to become. We can be better as an industry, evolve faster, and keep the next generation of fans moving in the right direction. Let’s reinvent ourselves so we can continue to inspire, motivate, and simply entertain the next generation.

**It’s time to lead.**



*Angela Ruggiero*  
CEO & Co-Founder  
Sports Innovation Lab



# Crippling Losses Are Everywhere

The Pandemic Hit Every League

**\$13 Billion**

Across U.S. Sports  
Leagues in Covid Losses



**\$28.6 Billion**

Lost in wages and earnings  
through November 2020

**1.3 Million**

Sports-related jobs lost



**\$4.5 Billion**

loss in ticket and  
non-ticket revenue



**\$980 Million**

in revenue lost from TV,  
marketing, and tickets

**10%**  
Drop in  
revenue



**30%**  
Drop in  
revenue



**\$20 Million**

loss in ticket and  
non-ticket revenue

**\$4 Billion**

in total revenue from  
a lost football season



## The Hope, The Savior?

With crippling debt, many sports organizations are seeking financial relief from local governments or debt financing from investors. Others are looking to creative new finance vehicles like SPACs to fund growth.

The hard truth is that none of these investment vehicles will work unless there are fundamental structural changes to operations that allow sports properties to capture new fans and scale their fan bases beyond game day. Investors know this, and they're struggling to find the right deals and management teams.

AS OF 12/20: there are 39 SPACs that are sports-focused and/or led by sports executives.

They have raised or seek to raise close to \$16B in capital.

**Sportico**

# How Sports

# Will Recover

We believe the path forward for the Most Innovative Teams in the industry requires bold action that focuses decision making around three key priorities:

## Revenue Diversification

01

### Recovery Plan & Goal

Sports organizations must diversify revenue and look beyond traditional money making opportunities and find adjacencies in other forms of sport, media, and entertainment.

### Fluid Fan Benefits

Revenue diversification means fans have more exciting ways to connect, own, access, and participate in sport, with both the team and athletes they love.

## Organizational Agility

02

### Recovery Plan & Goal

Leaders must reimagine their organizations, invest in skills, bring in outside talent, and diversify their management teams. Leagues must rethink ownership group profiles and standards to future team owners cultivate brands and engage more directly with fans.

### Fluid Fan Benefits

Organizations that are agile can work quickly to meet new fan expectations, and meet them where they are (voice, game platforms, social, etc.). They will also reflect the fan base in diversity and stay in step with social issues that matter to fans and cultivate their loyalty.

## Technology Focus

03

### Recovery Plan & Goal

The most innovative teams will design ways to collect first-party data and develop a deeper understanding of their fans. Teams will then be able to invest in the technologies that enable fans to watch more of what they love and access the athletes they care about most. This personalization will help optimize revenue, attract new fans, and empower athletes to drive greater brand equity for the organization.

### Fluid Fan Benefits

Fluid Fans are using new technology every day to watch media, make their own playlists, and create their own social media. They expect sports teams will make it easy for them to co-watch with their friends, access stats through voice, and bet on games. All these expectations require technology. Fluid Fans who view the sports product as outdated will spend their time and money with other forms of entertainment.

# Diversify Revenue

## Beyond Game Day

01

### Imperative

#### Participate in pre- and post-game revenue.

While it is not possible for most sports properties to quickly invest in a mixed-use development project to surround their venue with retail and entertainment, there are plenty of creative opportunities to surround the venue with festival-like activities, outdoor concerts, food trucks, and community programs. Teams must find clever near-term ways to bring more fans to games earlier and entice them to stay later. Teams should prioritize media and entertainment experiences that can last beyond the “activation” and offer non-game day revenue opportunities.

**Diversify holdings.** Not every team has the flexibility to build out an international ownership group with global assets. That said, management teams can prioritize business development with other properties to gain access to new markets. Teams should seek out womens sports properties, esports and digital sports leagues, and international sports properties that have brand alignment.

**Offer new products.** Tickets, concessions and merchandise aren't the only way fans can contribute to revenue growth. Look to open up club ownership opportunities for fans, and give them the ability to buy stakes in key club decisions. Make them feel like owners. Look to evolve co-watching digital streams that unlock social gaming and gambling revenues. Most importantly, empower athletes to drive more revenue for the team with the social media tools and content they need to express themselves online. This direct-to-fan digital access to athletes should help make youth development revenue more scalable than traditional community outreach programs like local clinics and camps.

### Example

FC Barcelona is in the midst of a stadium renovation called Espai Barça. Their mixed use development project will house the 100,000-seat Camp Nou, as well as the 6,000-seater Johan Cruyff Stadium, where FC Barcelona's women, the Barça B and youth soccer teams will play. The club is also investing in technology to create a virtual stadium, acknowledging that many of their fans may never be able to visit Camp Nou in person. The district, called the Barça Campus, will include offices, tours, restaurants, fan club member areas, a museum and more.

LAFc and Angel City announced that they will be sharing a home at Banc of California stadium when Angel City takes the field in 2022. For LAFc, it's a strategic move to bring fans of the women's game to the state-of-the-art stadium, and it's a chance for both clubs to cross-promote, invest, and learn from each other.

During lockdown, The Philadelphia 76ers' Al Horford hosted a dribble challenge through the HomeCourt app. This was a great example of scaling direct access to an athlete at the local level. Using the app's artificial intelligence, fans recorded videos of themselves completing a 1-minute dribble challenge, and were encouraged to upload their videos by tagging the @jr\_76ers and using the hashtag #StayInTheGame. As the pandemic continued to change normal modes of engaging young fans through camps and clinics, the 76ers continued to rely on HomeCourt to power sponsored virtual camps - where by the end of the camp, leading campers had each dribbled more than 30,000 times.



# Build An Agile Organization

# 02

## Imperative

**Gain exposure to emerging tech.** Most sports organizations can't afford to recruit high priced technology-fluent talent in the wake of the pandemic. To get access to the technology chops required to design breakthrough fan experiences, now is the time to align with accelerator programs or venture funds to start identifying and developing new products and services.

**Develop in-house data skills.** Sports organizations must learn to understand the difference between data scientists, data engineers, and data analysts. They have to start analyzing behavioral data -- not just demographic CRM data. The skills needed for this advanced strategy and marketing work are different than repurposing statisticians who work on talent and player performance. To hire the right talent at the right time, first hire a chief data officer consultant to oversee staffing, draft job specs, and handle recruitment.

**Make diversity and inclusion a priority.** Organizations must make a meaningful effort to bring in different voices to decision making that will make a financial impact to the organization. Research shows that for every 10% increase in gender within organizations, there is a 1-2% increase in revenue. Washington Football Team President, Jason Wright, builds diversity and inclusion practices into the business model and makes a compelling economic argument for others to follow his lead:

"It is important for us to reflect our environment in how we build this stadium. My research actually shows that we see the stadium as an economic growth project for the region. I picture putting these groups into the physical infrastructure because that's what makes it lasting." - Wright

## Example

Of the 25 most innovative teams, 48% have incubator programs to invest in new technology products. That technology forward access and approach is helping execs develop pattern recognition and identify trends. Only 14% of all other teams in the top 10 leagues have access to these kinds of groups.

Less than a quarter of teams in the top 25 have dedicated business intelligence groups. This is higher than the rest of the teams in the top 10 leagues, but not by much. This may mean that teams are leaving money on the table. More data isn't better data, and more data isn't better without the skills and knowledge to make it actionable. A number of the most innovative teams (Juventus and Manchester City) have built university or college programs that are aimed at preparing students to work in sports - across technology and data fields.

According to The Institute For Diversity and Ethics in Sport, the NBA leads the way with six women in CEO/President positions across the league. MLS has four women, but no people of color in CEO/President positions, and the NFL has two women and two people of color in CEO/President positions. MLB has one woman in a GM position, but no women or minorities in the CEO/President role. In the EPL, a 2017 report found that just 7% of director level roles were filled by women, despite 100% of the EPL teams having ownership stakes in women's football programs.

It is an understatement to say the industry must do better to bring new perspectives to the table.



# Focus on Technology and Alignment With Fluid Fans

03

**Move beyond demographics.** Teams must move beyond the demographic data in their CRM database to make sure they better understand customer behavior. Expensive CRM projects focused on physical addresses, email addresses, and ticketing data aren't providing the first-party behavior data sports organizations need to understand media consumption patterns and design new products. Teams should start collecting data on what fans are doing not just who they are. Teams that design data-driven sponsorships will jumpstart first-party data collection by leveraging the investments made in digital sponsorship activations.

As the graphic on this page makes clear, demographic based segmentation only goes so far. These two profiles, while demographically identical, clearly do not engage in the same behaviors. Brands, properties, and tech companies who have a behavior focus will delight Fluid Fans with personalized experiences.

**Develop Fluid Fan personas.** The current fan avidity models of "die hard fans" and "casual fans" are static. Yet, these models guide a tremendous amount of investment and decision-making.

These summary views of fans and audiences are important for media planning and marketing, but teams need to go further with their audience development and embrace fans' fluidity.

Fan personas shouldn't be a snapshot in time. In the New Age of Sport, like fans themselves, these personas need to be dynamic and change as cultural, social, and environmental conditions change. To spot these influences and even predict them, organizations need to make sure fan data is built on feeds that update meaningful changes in viewership, purchasing, and social behavior.



Male  
65+ age bracket, grew up in england, on second marriage two children, successful career, affluent, holidays in the alps, loves dogs



Male  
65+ age bracket, grew up in england, on second marriage two children, successful career, affluent, holidays in the alps, loves dogs

Source: Affino

**Track what fans care about.** Forget fan surveys! Juventus and FC Barcelona, both in the top 25, partnered with a company called Socios so they could allow fans to Own a piece of the team. With a limited number of tokens available for 2 euros (\$2.22) per token, the club gave fans the opportunity to have VIP status, own a piece of the club, and vote in club decisions. FC Barcelona's Socios debut sold out in less than two minutes and generated \$6 million in bitcoin token sales. With this digital platform, both clubs are able to learn from observing fan behavior and gathering direct first-party data from their most valuable customers. Consent-based data sharing is at the heart of GDPR and new data privacy regulations, and sports properties are uniquely positioned to gain consumer consent.

Seek out "zero-party data" which sees fans proactively sharing data with organizations, which enables recognition of changes in behaviors and culture more quickly and accurately.

# Top 25 Most INNOVATIVE TEAMS

from Sports Innovation Lab



# Top 25 Most INNOVATIVE TEAMS

- |    |  |    |   |
|----|--|----|---|
| 01 |  Manchester City FC       | 14 |  Green Bay Packers      |
| 02 |  Real Madrid CF           | 15 |  AS Roma                |
| 03 |  Arsenal FC               | 16 |  Borussia Dortmund      |
| 04 |  FC Barcelona             | 17 |  Tottenham Hotspurs FC  |
| 05 |  FC Bayern Munich         | 18 |  Toronto Raptors        |
| 06 |  Manchester United FC     | 19 |  Seattle Seahawks       |
| 07 |  Golden State Warriors  | 20 |  Chicago Cubs         |
| 08 |  Paris Saint-Germain FC | 21 |  Los Angeles Clippers |
| 09 |  Juventus FC            | 22 |  San Francisco 49ers  |
| 10 |  Sacramento Kings       | 23 |  Cleveland Cavaliers  |
| 11 |  Liverpool FC           | 24 |  Atlético Madrid      |
| 12 |  Philadelphia 76ers     | 25 |  FC Schalke 04        |
| 13 |  New England Patriots   |    |   |

## TOP 25 TEAMS - BY LEAGUE



06



05



03



03



04



01



01



02

# The Top 25 Teams: By The Numbers

Our research rewards teams for: 1) making a strong push to own first-party data about their fans. Owning an OTT or digital platform is a powerful asset. 2) diversifying products and media by making strong commitments to women's, esports, and youth properties. 3) aligning with dominant global tech companies to drive scale into new products and services. Beyond press releases, we look for who has long-term partnerships with the tech giants. 4) developing

venues beyond game day so fans have more reasons to come and stay. 5) staying close to emerging tech through VC funds and accelerator programs and giving fans novel ownership opportunities with blockchain tech. \*

Therefore it's no surprise that the Top 25 have all made meaningful efforts and investments in these areas. Here are some other facts about the Top 25 worth noting:

**56%**

Are international football brands

**4 teams**

Located in California

**24%**

Ownership groups own more than one team

**28%**

of teams have fan ownership opportunities

**48%**

Offer incubator programs

**28%**

Have business intelligence job functions

**72%**

play in a mixed-use environment

**76%**

of the top 25 team venues have been renovated in the last 10 years

**80%**

Have paid fan membership groups

**28%**

Have business intelligence job functions

**56%**

Own their own OTT platform

**52%**

Have women's teams associated with their team,

**76%**

Have a sports betting partner

**44%**

have social media accounts in more than one language

*\*To read the complete method for producing the rankings, turn to p. 18*



# The Most Innovative Team:

## #1 Manchester City FC

**Overall Innovation Rank: 1st**

**Technology Focus Rank: 5th**

**Revenue Diversification Rank: 13th**

**Owner:** City Football Group

**Venue Owner:** Manchester City Council

**Portfolio of teams:** Melbourne City F.C., New York City F.C., Mumbai City F.C., Sichuan Jiuniu F.C., and more.

**Capacity:** 55,000

**Social Media Fanbase:** 195,748,173\*

**Other Assets:** Sapphire Sport, City Football Academies

**Concessionaire:** N/A

**Home Venue:** Etihad Stadium

### Recent Activity And Top Brand Alignment:

Onefootball - ManCity partnered with Onefootball to distribute global editorial content on the digital soccer app. The partnership was a first for the German based-company.

Puma - Mumbai City F.C signed a sponsorship deal with Puma, who outfits ManCity. This is a testament to the power of a centralized ownership group.

Douyin - ManCity signed an exclusive content deal with Douyin, the Chinese platform owned by ByteDance (which also owns TikTok)

## Tech Leadership

Manchester City has had their challenges recently, but that hasn't stopped them from taking full advantage of their global brand awareness to diversify revenue opportunities, launch their own OTT service, and expand their products and services.

City has consistently delivered unique experiences that other teams with fewer resources and smaller audiences would be wise to emulate. For example, the club recently launched a Facebook campaign that promoted a freestyle football competition globally. City worked with Facebook and fans to generate to long-form and short-form content that extended fan participation well beyond game day and created a massive body of non-rights protected content. This activation and partnerships like the one built with Nissan take advantage of City's larger family of assets in the City Football Group.

The club scores the highest in technology breadth which means they are exploring various new products and services before others. That may be no surprise because they are one of the lead investors in the Sapphire Sports and \$115M venture fund.

As with most of the top teams, City invests heavily in youth development and uses technology to scale programs targeted at this demographic. For example, Manchester City was the first team to launch on YouTube Kids - a channel dedicated to 12 and under age group, and the club has a partnership with Capstone Games to develop digital experiences fans use to act as football managers and make critical game-times decisions.

In addition to all the brand and tech alignment City uses on social platforms, it gets similarly high marks for its revenue diversification and development of the Etihad campus -- a multi-use district around the stadium that gives Manchester a hub of various media and entertainment experiences. As it continues to collect first-party data from its fans globally, it will be in a prime position to deliver Fluid Fans a personalized experience.

We expect City will be hard to unseat at the top of the rankings. They have a strong tech focus that should keep them ahead of the pack.

# Rounding Out The Top 5:

## #2 Real Madrid CF



Real Madrid comes in second in the global rankings not far behind Manchester City because the club has worked hard to meet future fans where they are with technology and merchandise. The team benefits from LaLiga's work with Santander esports, and a partnership with Twitch. Real has also invested heavily in video streaming and production. For example, the club uses Grabyo video editing, LiveLike for watch parties, and tools to optimize streaming distribution across IP networks and CDNs for localization.

Real Madrid also gets high marks for its investment in CD Tacon - a women's soccer club that was acquired and promoted to the first division by Real Madrid in July. The promotion of the team includes a docu-series on HBO to provide

greater visibility to the team and the stars who play for them.

The renovations to their stadium Santiago Bernabeu have continued over the years in partnership with a number of technology firms who have digitized the live event experience, added esports facilities, and expanded services beyond the stadium walls into the surrounding gardens and plaza.

With Microsoft, Twitch, Playstation, and a number of other large technology relationships, Real Madrid will continue to have the global reach to engage and acquire future Fluid Fans.

## #3 Arsenal FC



Over the past decade, KSE brought Arsenal into its ownership group which includes a diverse portfolio of properties: including the LA Rams, Denver Nuggets, The Colorado Avalanche, and The Colorado Mammoth. We believe that properties like Arsenal who have various properties across multiple geographies benefit from the operational efficiencies of centralized sales and marketing, finance, and technology.

In 2020, KSE and Arsenal pushed on cross-border sustainability projects, gained access to new gaming and gambling technology, improved cloud media production with Blackbird and AWS, and extended a partnership with Intel to continue developing immersive media. Despite fans grumbling about the American who owns the team and the stadium that feels "soulless", the team continues to push the boundaries of fan membership and loyalty programs.

These initiatives all build value for Arsenal's broadcast and media distribution deals with Amazon and BT Sport. As one of the founding members of Twitch Sports, Arsenal has kept itself in front of younger global fans who stream games. Their investments and success with their women's team shows a strong commitment to developing that property with an eye toward growth and further revenue diversification.

It's easy to see how more than 100 years of history benefits a sports property. Arsenal has years of learning how to build on traditional fandom and generational allegiances, but they've demonstrated a willingness and effort to leverage that position of strength to establish the technology partnerships that align with future fan behaviors. Their position at the top of the 2020 Innovation Ranking isn't rooted in the past, it's very much with an eye to the future.

# Rounding Out The Top 5:

## #4 FC Barcelona



FC Barcelona's success on the pitch and drives a tremendous amount of commercial attention. The results are a clear: the club leads in a number of digital initiatives where growing global fandom matters. Specifically, the club makes aggressive moves to own its connection with its fans - most recently by launching Barça TV+. The current platform is dedicated to off-field content and the women's team home games, but has a specified goal of collecting more fan behavior data and personalizing the fan experience. This distribution strategy coincides with a large investment in Barca Studios - where the club manages the creation, production and commercialisation of FC Barcelona's audiovisual output. These assets will drive even more attention to Barca's incredibly popular youth program and teams.

Barca leads across a number of third-party digital platforms with games as well. The team boasts more than 1000 fan clubs globally and well over

350 million social media followers. Their strength in Asia is represented by Messi's cover spot on Japan's Konami Digital eFootball game and the club's dominant position on China's Weibo.

The team's venue Camp Nou is one of the world's largest venues. Its ambitious Espai Barça project will modernize the surrounding district and facilities, and provide a number of new revenue opportunities for the club. Unfortunately, the project has stalled a number of times due to financing.

Barca sympathisers own the team through a membership program, and perhaps that model more than even the club's success on the pitch, keep it relevant and ahead of others in areas that matter to Fluid Fans.

## #5 FC Bayern Munich



FC Bayern Munich is a sports club with hundreds of thousands of members who push the club off the pitch to keep its business opportunities forward reaching. The club boasts membership in multiple other sports, runs its own OTT channel, and invests in strong youth and female properties. For example, it's expanding its youth academy program in the U.S. The club also develops retail business opportunities around Allianz Arena, and has joint ventures in tourism, cryptocurrency, and digital collectibles.

FC Bayern Munich's connection with global fans is well documented. It has thousands of fan clubs and millions of social media followers. Its tech-

forward thinking comes from a strong alignment with Magenta Telekom (T-Mobile) who enabled 5G in the venue, Red Bull who hosts a winning ice hockey team in Munich, and with SAP.io who runs and accelerator program for startups. The club also works closely with Amazon on cloud services and player tracking.

As the Bundesliga's most innovative team, FC Bayern Munich will continue to push other clubs to invest more heavily in diversifying products and services. The women's game and youth programs offer fertile ground for developing new media and content that will keep FC Bayern Munich at the top of the Innovation Rankings.

# Wrapping Up:

## Rising Stars

### Sports Innovation Lab's Innovation Ranking methodology limits its evaluation to professional sports teams in the top 10 revenue grossing leagues.

To recognize the innovation of emerging properties and the power and potential of women's sports we created the Rising Stars category. Below are sports organizations we believe would score highly in our innovation ranking if they fit our selection criteria:

**Athletes Unlimited** breaks the competition model. As an emerging league that played its first season in 2020, AU gets high marks for redesigning traditional sport formats to make each play more meaningful and drive fantasy-like engagement for the different leagues they launch. They are athlete-owned, multiple-sport (softball and volleyball), and socially conscious management structure drives a different level of fan interest and passion. They have spent a lot of time finding clever ways to give fans access to their favorite athletes, including social content and access to the weekly player draft.

**Premier League Lacrosse** continued to push the boundaries of athlete access. Paul and Mike Rabil built the PLL with a powerful focus on off-field content and athlete access. Their touring model had festival-like activities before the game which helped connect the players to the kids who wanted to develop skills and access expert coaching. All this focus was supported by Paul's and the PLL's enthusiastic and creative social media push. The PLL supported the commercial growth of their athletes in the off-season through academy and coaching opportunities.

**WNBA** drives diversity. This year, WNBA athletes led the walk out for social justice. It's no small fact that these women stood up first for the off court issues. Doing so risked their livelihoods, which they've been fighting for since the league's early days. The WNBA walks the walk when it comes to diversity: 48.6% of leadership positions (VP and higher) are women. At the core of their growth will

be new investments from large tech: Partnerships with Oculus, Twitter, and HomeCourt keep fans engaged while under lockdown.

**NASCAR** demonstrated it can move fast on and off the track. One of the most agile sports properties in 2020, NASCAR leaned on simulated racing (digital sports) to reach some 1.7 million new fans during the early days of the lockdown. The organization made decisions faster this year, bringing in BetMGM to their partner portfolio, and introducing Scanner free of charge to allow fans to listen to the audio in any car. NASCAR also boosted the live data available to fans, which is critically important for those new fans who want to learn about the sport.

**UFC** fought worldwide. The UFC used all the moves it had to fight through the pandemic. Some steps required last minute format or venue changes, including Fight Island. Other moves were related to future revenue streams like digital collectibles. Through its partnership with Dapper Labs on cryptocurrency collectibles UFC created a new set of inventory for fans to buy and trade. Management also continued its international focus. It expanded its Snapchat partnership and rolled out Fight Pass in Japan. Their Grabyo partnership allowed UFC to produce and push near-live clips to all its social channels, allowing for localized optimization by their regional teams.



# Moving Past

## The Pandemic

**Throughout history**, people have turned to sports as a place to be inspired, be entertained, and as a place to bring the world together. During the pandemic, sports struggled to be accessible- at a time when the world needed us most.

The steps suggested in this report, and modeled by the World's Most Innovative Teams, are bold. These steps require a strong commitment to restructuring, rebuilding, and investing so growth is both possible and sustainable. when we come out of the pandemic.

The skeptics will say that a vaccine will bring us back to complacency. That may be true for some, but the most innovative sports organizations are not simply hoping media rights and stadiums return. They're planning and actively building their foundation for the future. The best properties with true global innovation will engage and support the needs of the "Fluid" consumer.

These innovation rankings are dynamic. They will change as the market changes and as team's evolve. In next year's research, we will look to further measure and reward meaningful steps in diversity, equity, inclusion, and professional development. Management teams need to reflect the markets they serve. Operations must be driven by talented data professionals not gut-level decision makers and hospitality.

We trust in the confidence YOU have to see beyond the most recent loss and to take the ice again ready to fight and win. 2021 is here, and we're ready to punch back. Join us.



# The Methodology Behind

# The Most Innovative Teams

As Revenue Diversification, Organizational Agility, and Technology Focus are the keys to success, we used our data to measure which global sports properties are in the best position to succeed according to these criteria.

To start, we analyzed the Top 10 Leagues in the world according to highest revenue generation for team sports. From this list, we identified the 25 most innovative global sports properties. The 10 highest revenue-grossing leagues are: NFL, MLB, NBA, EPL, NHL, MLS, La Liga, Bundesliga, Serie A, Ligue 1, and the UCL.

The Top 25 Sports Teams are making the right moves to grow in the new age of sports and win the Fluid Fan.

## Where does the data come from?

With our proprietary technology, Sports Innovation Lab has analyzed and scored...

**150,000+ market signals**

**2+ years of data**

**8,000+ data sources**

**4,000+ companies**

...to determine how teams align with Fluid Fan behaviors and enabling technologies. These signals emerge from proprietary natural language processing of business articles, blogs, industry reports, financial reports, press releases and more.

## Behind

# The Rankings

## Top 25 Most **INNOVATIVE TEAMS**

### Revenue Diversification

Sports organizations rely on media rights, gate receipts, sponsorship, and concessions. We believe this is changing with the emergence of Fluid Fans. Revenue diversification means that sports properties have the opportunity to go beyond these traditional business models to drive fandom.

### Organizational Agility

Organizational agility is about the diversity of a team's front office structure. The teams who are most innovative are able to invest in talent, leverage data, learn from adjacent industries, global economies, and launch new ventures.

### Technology Focus

Fluid Fans are open to change, empowered to choose, and continuously evolving. Teams that understand how to use technology to enable specific fan behaviors are better suited to win and keep the attention of the Fluid Fan. Our data measures the strength of association between teams and technologies we know matter.

# Sports Innovation Lab

Sports Innovation Lab empowers sports brands to create breakthrough fan experiences through technology.

Sports Innovation Lab is leading a sports research revolution. We exist to educate our clients on the technological possibilities for their brand and how to ultimately drive value to the end consumer: the Fluid Fan™. We inspire brands to create bold fan experiences through data-driven technology insights and industry-leading research.

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www.sportsilab.com

## End Notes

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