

BLOG REPORT

2025 Series Win to 2029 Riches: Lions' Full-Stack AI Commercial Pivot



The British & Irish Lions' AI-Powered Pivot to Revenue Growth

The British & Irish Lions, fresh off their momentous series victory against the Australian Wallabies in July & August 2025, stand at a fundamental tipping point. This isn't just a moment for celebration, but for **radical, transformative change**. To truly build on this hard-won momentum and success on the field, the Lions have an immediate, unprecedented chance to **leverage data, AI, and cybersecurity to fundamentally pivot to digital revenue growth at scale**.

For too long, the financial model of the British & Irish Lions, much like global rugby, has resided in a comfort zone. Revenue generation has been heavily reliant on the cyclical nature of tours, primarily through legacy broadcasting deals, stadium ticketing, and major tour sponsorships. While historically lucrative, this approach is akin to navigating a hyper-speed digital highway in a horse-drawn carriage. The future, especially post-2025 series win, isn't about slightly larger broadcast deals or more expensive tickets. It's about a **fundamental re-imagining of how the Lions connect with their audience**, moving from episodic windfalls to continuous, diversified digital engagement.

The Fading Echoes of Legacy: A Look at Lions' Past Revenue

Examining the last 12 years (encompassing the 2013, 2017, and 2021 tours, and projections for 2025), a predictable pattern of reliance on established pillars emerges:

- **2013 Tour (Australia):** Rugby Australia expected around \$40 million, highlighting the significant financial injection to the host union primarily from ticket sales and broadcast.
- **2017 Tour (New Zealand):** New Zealand Rugby reported a record profit of \$33.4 million, with the Lions series being the driving force, injecting an estimated £65 million into the economy from visiting fans. The Lions themselves saw a €9.3 million profit.
- **2021 Tour (South Africa):** Severely impacted by COVID-19 with no crowds, SA Rugby still broke even (R9 million profit) largely due to crucial television rights and increased sponsorship. The Lions recorded €9.6 million in profit despite the challenges.
- **2025 Tour (Australia - Projections):** Projected to be a massive financial boon for Rugby Australia, potentially exceeding \$100 million. This continues the trend of traditional revenue streams dominating, with players for the first time earning a portion of the tour profits, signaling a new partnership model.

This historical overview reveals a predictable, event-driven revenue model. While lucrative, it **lacks the sustained, diversified growth seen in digitally mature industries**. It's a testament to the enduring appeal of the Lions, but it's *not* a blueprint for future exponential growth. This reliance on a four-year cycle of major tours, with revenue spikes tied to broadcast deals and in-person attendance, is precisely the "traditional, backward step" that is holding back the global rugby business model. It reflects a comfort zone that prioritizes established relationships over innovative fan engagement.

The Digital Imperative: Why AI is a Lifeline for the Lions

The digital juggernaut is reimagining the sports viewing experience. For the Lions, clinging to an analog mindset is a fatal flaw. The future lies in embracing **AI-augmented, data-driven operating models** to secure new digital revenue streams.

The Gen Z and Alpha Imperative: The New Fan Landscape

Gen Z (born roughly 1997-2012) and Gen Alpha (born roughly 2013-present) represent the **future of the sports fan base**. These digital natives have fundamentally different expectations for content consumption and engagement:

- **Personalization & Immersive Experiences:** They crave interactive, personalized, and shared experiences that extend beyond passive spectating. They expect interactive elements like polls, quizzes, behind-the-scenes content, and augmented reality (AR) overlays. They want to feel part of the action, not just spectators—with over 60% willing to pay to watch a live game in VR from a player's point of view.
- **Short-Form, On-Demand Content:** They demand content on their terms, in short bursts, tailored to their specific interests. They want highlights, key moments, and control over their viewing experience.
- **Authenticity & Community:** Gen Z seeks genuine connections with athletes and teams, valuing authenticity and community. They want to understand players' stories and the team's values, thriving in online communities where they can share content and conversations.
- **Skepticism of Traditional Advertising:** They are accustomed to skipping ads and ignoring generic loyalty programs, demanding authenticity, personalization, and purpose-driven content before engagement or spending.

The current rugby business model, heavily reliant on linear TV and traditional advertising, is failing to capture these audiences effectively. Many sports organizations suffer from a lack of data maturity and insufficient cybersecurity, hindering their ability to adapt.

Rewiring How the Lions Operate: An AI-Augmented, Data-Driven Model

To truly engage and monetise Gen Z and Alpha fans, the British & Irish Lions must secure explicit buy-in from the C-suite to build robust data infrastructure, implement sophisticated AI and cybersecurity strategies, and confidently leverage diverse data sources. This transformation is essential for delivering **hyper-personalised fan experiences, maximising Customer Lifetime Value (CLV)**, and unlocking the vast monetisation potential of their global social media fan bases.

1. Data as the New Gold Standard: Building a Robust Data Infrastructure

The core of any AI-driven strategy is data. The Lions must prioritise the systematic collection of **first-party data** across all touchpoints: website interactions, social media engagement, app usage, merchandise purchases, content consumption patterns, and even fan sentiment from digital conversations.

- **Unified Fan Profiles:** AI can consolidate disparate data points into comprehensive, unified fan profiles, offering a **360-degree view** of each fan's preferences and behaviours.
- **Predictive Analytics:** By analysing historical data, AI can predict future fan behaviour, identify potential churn risks, and anticipate demand for new content or products.
- **Secure Data Lakes:** Investing in scalable, **secure data infrastructure** (data lakes) is paramount. This is about making data accessible for real-time analysis while ensuring robust cybersecurity to protect sensitive fan information.

2. AI-Powered Personalization: Delivering Engaging Digital Immersive Experiences

AI's true power lies in its ability to **personalise experiences at scale**, moving beyond a "one-size-fits-all" approach to a "one-to-one" relationship with each fan. As TIAKI's "Scaling Immersive Fan Experience Revenues" report suggests, this is where significant growth lies.

- **Hyper-Personalised Content Feeds:** Imagine a Lions app where AI curates a unique content feed for each fan: tailored highlights of favourite players, exclusive behind-the-scenes access, interactive quizzes, and gamified loyalty programs that encourage active participation.
- **Immersive Technologies:**
 - **Virtual Reality (VR) and Augmented Reality (AR):** AI can power truly immersive experiences. Picture watching a Lions match in VR from a player's perspective, or using AR overlays to get real-time stats and player information during a broadcast. These technologies redefine fan growth potential.
 - **Metaverse Experiences:** The Lions could create virtual fan zones, allowing global fans to connect, interact, and experience exclusive content in a metaverse environment, potentially even attending virtual meet-and-greets.
- **AI-Driven Merchandising and Retail:** AI can personalise product recommendations, offer virtual try-ons for jerseys, and enable custom merchandise creation, moving beyond analog football experiences. This is AI-powered digital retailing in action.

3. Redefining the Revenue Mix: Beyond Traditional Boundaries

The shift to an AI-augmented, data-driven model will unlock **new, sustainable digital revenue streams**, complementing and eventually superseding reliance on traditional sources. As "Digital Gold: Unlocking Fandom Value" outlines, this is the future.

- **Direct-to-Consumer (DTC) Digital Subscriptions:** Offering exclusive access to AI-curated content, extended behind-the-scenes footage, interactive fan forums, and early access to merchandise or ticketing.
- **Targeted Digital Advertising and Sponsorships:** Brands can sponsor specific personalised content segments (e.g., "Player X's Top 5 Tries Powered by Sponsor Y"). AI allows for highly targeted advertising based on viewer demographics, interests, and viewing habits.
- **Digital Collectibles and NFTs:** Creating unique digital assets (e.g., player moments, virtual memorabilia) that fans can own and trade, fostering a new economy around Lions fandom.
- **Fan Tokens and Loyalty Programs:** Utilising blockchain and AI to create fan tokens that grant perks like exclusive content, voting rights, or access to special events, turning loyalty into a tangible, monetisable asset.
- **E-commerce Personalisation:** AI-powered recommendations will drive higher conversion rates for online merchandise sales.

4. Cybersecurity as a Foundation, Not an Afterthought

As the Lions embrace a data-rich, AI-powered future, cybersecurity is no longer an IT department concern; it's a **fundamental business imperative**. The increasing reliance on digital platforms and the collection of vast amounts of fan data make cybersecurity a critical concern.

- **SASE (Secure Access Service Edge):** Implementing SASE frameworks ensures secure access to data and applications from any location, crucial for a globally dispersed fanbase and operational team.
- **AI-Powered Threat Detection:** AI can analyse network traffic and user behaviour in real-time to

detect and respond to cyber threats, protecting sensitive fan data from sophisticated AI-augmented cybercriminals.

- **Data Governance and Compliance:** Strict data governance policies, aligned with global privacy regulations (e.g., GDPR), are essential to build trust with fans.
- **Talent Investment:** Investing in cybersecurity talent and expertise is critical to build a resilient digital infrastructure.

The Future Growth Curve: A Compelling Case for Gen Z & Alpha

The future business model for the British & Irish Lions does *not* sit in a comfort zone with traditional legacy revenue streams. It lies in understanding and embracing the digital native behaviours of Gen Z and Alpha. The success of the 2025 series win over the Australian Wallabies provides the perfect springboard. It injects momentum and a positive legacy that must be capitalised upon, not squandered through complacency. The time for a major shift from old school comfort zones is now.

Consider the immense potential for the next tour to New Zealand in 2029. Given the passionate rugby fan bases in England, Ireland, Scotland, and Wales, and the Lions' growing digital engagement strategies (including the 2025 TikTok partnership and "Digital Lion" initiatives), we can conservatively project a combined social media following of **12 million** dedicated fans and followers across various platforms.

Now, let's look at the transformative power of converting just **1%** of this projected social media audience into paying customers for immersive digital experiences:

- **Projected Social Media Followers (2029 Tour):** 12,000,000
- **Conversion Rate:** 1%
- **Converted Fans:** $12,000,000 \times 0.01 = 120,000$ fans
- **Immersive Use Cases:** 20 distinct digital experiences (e.g., interactive match replays with player POVs, virtual meet-and-greets, exclusive training access, digital collectibles, personalised fan challenges).
- **Price per Use Case:** €3.50 (a highly accessible price point)
- **Revenue per Converted Fan:** $20 \times €3.50 = €70$
- **Total Potential Revenue from 1% Conversion:** $120,000 \times €70 = €8,400,000$

This potential **€8.4 million** from just a 1% conversion highlights how a strategically applied AI-augmented operating model, combined with a focus on deep fan engagement and immersive experiences, can fundamentally redefine the British & Irish Lions' revenue mix. It shifts a significant portion of income from traditional avenues like broadcasting and ticketing to a **direct-to-fan digital economy**, unlocking unprecedented commercial potential and ensuring the long-term financial health and global reach of this iconic rugby institution. The future of rugby revenues isn't just about what happens on the pitch, but how intelligently organisations engage their passionate global digital fan base.

The time for complacency is over. The digital revolution isn't knocking on the door of the British & Irish Lions; it's already kicked it down. By decisively embracing the transformative power of data, AI, and cybersecurity, guided by visionary leadership and strategic investment, the Lions can not only build on their on-field success but also secure a truly disruptive and sustainable future.

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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.

