

# SPORT'S DIGITAL & DATA TRANSFORMATION GUIDEBOOK 2024-2025

**N3XT SPORTS**

# FOREWORD



**MOUNIR ZOK**  
CEO AT N3XT SPORTS

In light of the uptick in properties undertaking their own digital and data transformation initiatives through 2024, our *Sport's Digital & Data Transformation Guidebook 2024-2025* provides a compilation of N3XT Sports material published over the past 12 months, including key trends to look out for in 2025.

Among the company's milestones in 2024, N3XT Sports expanded its presence to the Gulf region following the opening of its dedicated Riyadh office. Our team is providing a ten-year digital growth plan for the region's sports ecosystem, which will undergo significant changes in the lead up to the Saudi Arabia 2034 men's FIFA World Cup during the coming decade.

As the industry looks to expand its digital capabilities, there are several steps sports organizations and rights holders can first take to improve their internal processes, as well as the fan experience. These include:

1. Establishing a solid digital foundation built on modern technologies, effective processes, and digitech capabilities;

2. Defining a data and digital transformation strategy – i.e. examining internally where and when to introduce customer-facing data touchpoints and how the front office should be using them to collect fan data;

3. Consolidating siloed data sets, ensuring that all departments have access to centralized fan, athlete, and stakeholder data via a single source of truth.

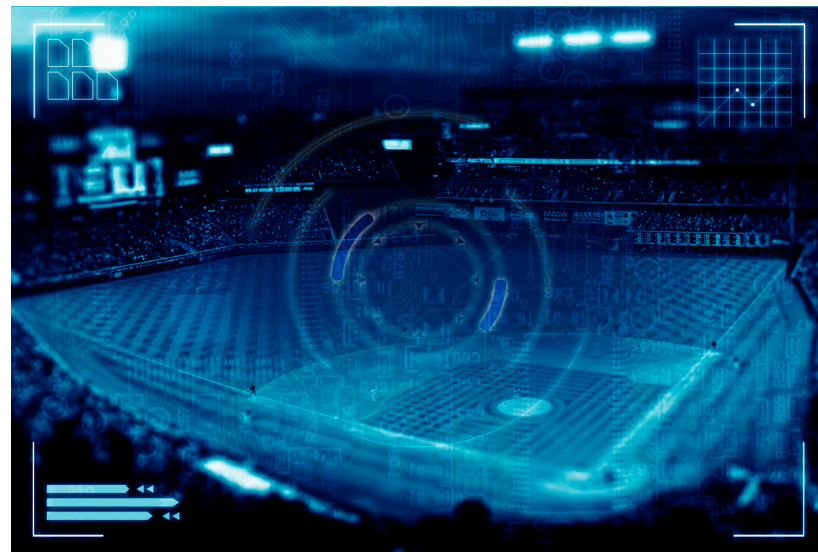
Within our client portfolio, there are several rights holders undergoing digital transformation projects that proactively consolidate their digital touchpoints via an omnichannel experience and, in doing so, are able to centralize fan, athlete, and stakeholder data.

Data consolidation is making it easier for sports organizations to inform their ongoing business decisions and improve customer relationship management (CRM). Meanwhile, as the industry looks to adopt the latest technologies such as artificial intelligence

(AI) to analyze user data – a step we see many organizations exploring – in order to expand their capabilities and tackle these latest trends, sports properties must first lay the groundwork by implementing a digital infrastructure that consolidates their existing data sources.

As we will examine further, automated and AI-driven technologies will become

valuable tools for leveraging fan data in the years to come. However, without first taking the aforementioned steps to digital transparency, sports entities without a clear data strategy won't benefit from new digital solutions and the latest assistive technologies on the market. It is therefore imperative that they establish a solid foundation before expanding their digital portfolios, beginning with their data governance.





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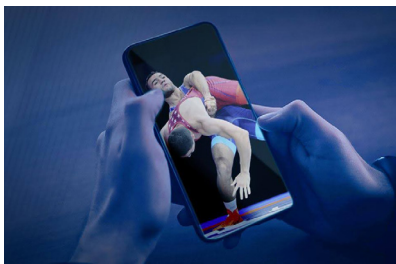
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# 1. DIGITAL STRATEGY

## MOBILE APP OWNERSHIP | HOW MOBILE INTEGRATION SERVES SPORT'S DIGITAL TRANSFORMATION



There are many advantages to owning a dedicated mobile app in sports business. While the principal benefits are for an organization to engage directly with its digital fanbase and collect first-party fan data, sports properties are leveraging mobile beyond the customer experience (CX); they are also wielding mobile apps to serve their athletes, as well as to connect their commercial partners and drive unique sponsorship opportunities via dedicated business apps.

A diverse tool for connecting stakeholders, mobile apps are also helping sports properties to unlock their own digital transformation journeys. By way of example, mobile apps act as pillars

for expanding an entity's digital product portfolio, including the development of new fan experiences such as video streaming and fantasy/gaming, as well as their ability to collect and manage user data by centralizing the organization's portfolio within a mobile-supported, omnichannel fan experience.

According to research carried out for our *Olympic Digital Transformation Report 2023*, although the majority of Olympic International Federations (IF) represented at Paris 2024 own an active mobile app (65.6 percent), based on findings at the time of publication, as few as 37.5 percent collect first-party fan data via mobile. This highlights an opportunity for Olympic IFs to diversify their digital offerings and to serve the management of other multi-stakeholder projects by integrating a mobile product within a carefully thought-out digital growth strategy.

Lara Ammar, N3XT Sports' VP of Project Excellence, highlights the value of carrying out detailed analysis of a sports organization's digital framework and the role mobile apps can play in expanding its digital offering and rolling out new platforms. She says that, whenever tasked with building something new for a client,

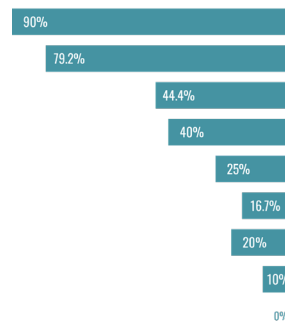
her team's approach is "always to help the client to better understand how digital adoption fits to its existing operations and ways digitalization enhances multi-stakeholder projects".

Therefore, by assessing how a sports entity uses fan data and areas where it can be improved, the organization will be able to strengthen its internal workflows and the digital and communications skills of its workforce through the creation of digital platforms that consolidate its internal data management. For example, N3XT Sports' proprietary research for our *Digital Transformation Regional Market*

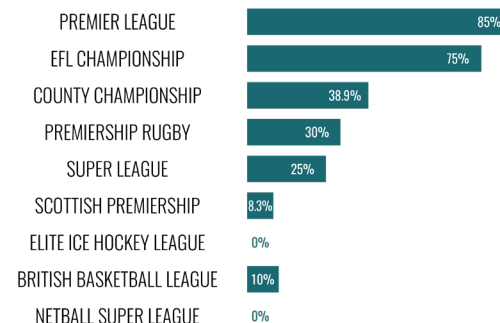
*Report 2024 | UK*, published in May, shows that 48.3 percent of 151 UK-based elite sports clubs and competition organizing bodies assessed own a mobile app, whereas 43.7 percent collect fan data via mobile (also see a breakdown of mobile ownership among elite UK clubs in the table below).

In summary, the UK sports market widely under-utilizes the use of mobile experiences. Among its benchmarks, both Manchester United and Manchester City football clubs provide an all-round fan experience via their dedicated mobile apps and are among three top-flight

### OWN A MOBILE APP



### COLLECT FAN DATA VIA MOBILE



UK football teams – with the addition of Chelsea – which incorporate fantasy predictor games within their mobile product.

Considering the growth potential of men's and women's elite sport in the UK market, mobile app ownership will prove to be an important step for many organizations seeking to grow their digital fanbase. Meanwhile, increasing levels of mobile adoption among domestic users demonstrates an opportunity for UK sports clubs to leverage mobile to augment their broader digital offerings and optimize their ability to ingest and govern first-party fan data.

## DIGITAL AUDIENCE GROWTH | STEPS TO INTEGRATING A SOCIAL MEDIA STRATEGY INTO THE FAN FUNNEL

During the age of digital and social media, within a saturated consumer market, how rights holders showcase their competition online is as much an incentive for growing its sport as it is to nurture the world's most gifted and formidable athletes. Meanwhile, their business development depends on how well the organization engages with audiences which expect more of the digital sports experience across multiple platforms.

In the midst of sport's modernization, while digital platforms enable sports organizations and rights holders to communicate directly with fans, social media, in particular, presents entities with

one way to engage digital fans, while most Olympic IFs are experimenting with their owned and operated platforms. However, even the most diverse social media strategies can be limiting for sports properties without the necessary resources to convert their fans into paying spectators.

The “fan funnel” is reliant on both a wide audience reach and the means to capture first-party fan data, both of which require a diverse digital inventory, and a clear strategy for how they should co-exist. For example, this was a focus of the International Basketball Federation (FIBA) and FIBA 3x3 – the organizing body for Olympic 3x3 basketball – to drive audience growth via its social channels in the build-up to the discipline's second appearance at an Olympic Games during Paris 2024.

Notably, FIBA 3x3 grew its social media audience by 88 percent to 1.6 million throughout 2023, driven mainly by its TikTok posts, which combined a paid-media campaign and, importantly, a dedicated content strategy for the channel. Similarly, there are several approaches IFs and national governing bodies can take in order to maximize their social media growth and engagement. They include:

- **Defining a content matrix and the creation of various content formats.**

While video content is a popular choice for building narratives, a mix of dynamic and static content helps generate higher engagement per post and greater value for the fan.

- **Be present on channels where your audience is most active.** Tailoring posts and post-frequency based on user behaviors across each individual social media channel can drive higher engagement per post, as long as they are distributed strategically and consistently. While viral posts maximize exposure among peripheral fans, strategic posts based on user interests can be used to drive conversions in the fan funnel.

- **Diversify your content series.** Sports bodies tend to ramp up their social content production during major events, though could benefit from the creation of campaigns delivered outside of their competition windows.

- **Build the athlete's image.** Fans enjoy player journeys and relate to the athletes they follow. Understanding fans' likes and dislikes, including their player- and team-preferences, can inform more engaging content.

- **Paid-media campaigns drive audience growth, visibility, engagement, and fan monetization.** Organic audience growth will steadily increase over time. However, paid-media campaigns can boost engagement at strategic moments (i.e. pre-Olympics) and bring social followers into the fan funnel by promoting the property's owned and operated products.

- **Elevate search engine optimization (SEO) via your social media channels.** This can be achieved by adopting keywords



and hashtags into individual posts, using subtitles in video content and adding “alt-text” whenever publishing blog posts and photos via your social channels.

“For emerging sports, the Olympics is an opportunity to maximize exposure, so it is important that they make a determined effort to grow their presence, particularly via social media, so that they gain more visibility around the event,” explains Miguel Doménech, N3XT Sports Digital Marketing Manager. “Thereafter, a clear conversion strategy is necessary for attracting more fans to your owned products, so as to communicate with fans directly and collect user information which, in turn, informs more relevant content production and more concrete strategies across your digital and social media platforms.”

# 2. DATA TRANSFORMATION

## DATA VISUALIZATION | 5 WAYS DATA DASHBOARDS DRIVE BUSINESS GROWTH IN THE SPORTS INDUSTRY

It is one thing for sports organizations to ingest and store thousands of datasets within a centralized information system. How data informs the entity's business decisions thereafter requires, not only a diverse digital portfolio and technological infrastructure to manage large quantities of data, but the capacity to augment and visualize the data in creative ways, so as to discover unique trends within user behavior and track team and business performance.

As sports organizations and rights holders continue to take greater ownership of fan, athlete, and stakeholder data, digital and IT departments are placing more onus on how they share information with their internal stakeholders. Data visualization, and the use of data dashboards, are commonplace inside organizations investing time and resources into data analytics, helping transform how data is leveraged by decision-makers within their leadership teams and across departments.

Data visualization is also a powerful tool for segmenting fan and stakeholder data. Our digital transformation team has designed,

implemented, and managed customized CRM solutions for several of our clients. As part of this process, N3XT Sports utilizes data intelligence dashboards to measure their audience growth and user commercialization, while our Project Excellence team provides ongoing training across our clients' technology stacks, including how data dashboarding can be integrated into their wider operations.

Data visualization should be a key component within an organization's growth strategy. Although there are multiple avenues in which data dashboarding can augment decision-making across every department, it's important for a sports property to first outline its overarching business goals and digital strategy, so as to fully understand the types of data and information they require to meet their objectives. These might include:

- **Audience growth and how a sports organization goes about acquiring and retaining subscribers via its digital platforms and social media channels.** Our team offers data management and audience analytics across the N3XT Sports client portfolio, highlighting opportunities for sports bodies to drive

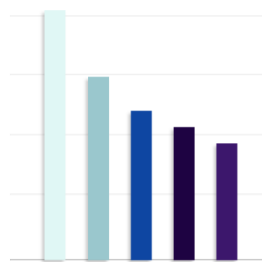
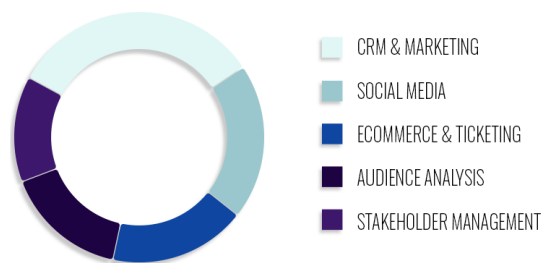
fan engagement and audience growth with the support of data dashboards.

- **Commercial planning, including the development of monetization strategies within the fan-marketing funnel.** This covers our clients' various data streams, across web analysis, mobile app performance, and the monetization of direct-to-consumer (D2C) fan experiences such as live-event video-streaming and personalized in-game activations.

- **Operational performance of sports-organization business units and employee productivity.** N3XT Sports is helping its clients enhance the employee experience (EX), notably the Professional Footballers' Association (PFA) which operates its own employee portal. Data visualization is essential to measuring workforce and business performance within any sports property, as well as for a custom-built CRM capability.

- **The creation of powerful content marketing campaigns derived from a deep understanding of the fan.** In the build-up to major competitions and during the retention period post-event,

## BUSINESS CASES FOR DATA DASHBOARDING





data dashboarding enables sports organizations to leverage the relevant audience data and extract insights for building personalized fan-marketing campaigns, including their ongoing performance and returns.

• **Sponsorship and stakeholder engagement.** Data visualization is important for keeping rights-holder partners up to speed on campaign performance and fan engagement. Data dashboarding also provides prospective partners and sponsors with a unique insight into the makeup of a sports organization and their different audience demographics.

Data visualization is proven to drive business growth and operational efficiencies inside sports organizations. Our team champions the use of data dashboards across our wide-ranging digital transformation projects, presenting our clients with instant and up-to-date insights into audience analytics and operational performance across multiple verticals.

Just as user data helps sports organizations tailor their fan, athlete, and stakeholder experiences, augmenting data has become a staple within the modern rights holder's toolkit. Granting organizations with such a simple yet instrumental resource is transforming how the industry not only collects data, but also how it inspires thought leadership and innovation throughout the sector.

**EXPLAINER | THE FAN-MONETIZATION DATA FEEDBACK LOOP**

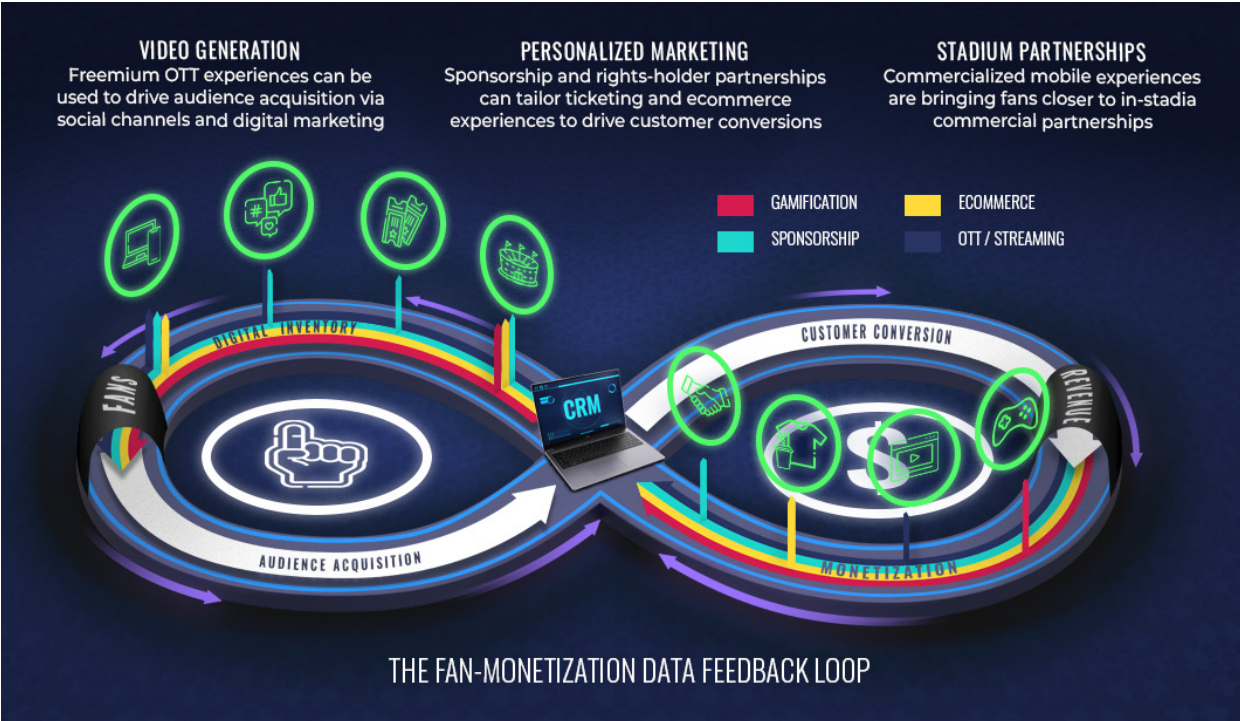
The fan journey, or fan funnel, is often thought of as being a linear approach within sports business. This involves sports organizations leveraging their communications and social media channels to acquire audiences at the earliest phase of the fun-

nel, before converting them into paying subscribers via an owned digital portfolio at its culmination.

While this is a common practice amongst rights holders seeking to commercialize the fan experience, the fan funnel could however be more accurately considered as a dynamic ecosystem made up of multiple

moving parts, not only a golden thread which runs between fan acquisition and customer conversion.

Sports properties are taking proactive steps to improve returns on their technology investments, including a shift in their own fan-monetization strategies. Whereas over the past decade (and particularly since the



Covid pandemic) there has been an uplift in D2C product investment, rights holders and sports entities are now turning their focus towards improving the quality of their relationships with their most-engaged fans while establishing stronger customer rapport and not only pushing for higher engagement numbers.

Among our clients, each one is taking a unique approach to their digital expansion, most of whom are also implementing a scalable CRM solution to manage the influx of user data across multiple digital touchpoints. This allows the rights holder to see changes in fan behavior in real-time using data dashboarding, opportunities to expand their portfolio based on user demands, and importantly at which stage of the fan funnel their users currently occupy.

Traditionally, D2C-ownership coupled with a scalable CRM solution helps inform monetizable experiences further along the fan funnel. However, an organization with an adaptable digital content offering is also able to leverage its commercial assets to inform the types of content and digital experiences that drive audience acquisition, based on its fan intelligence, and new ways to convert fans into customers.

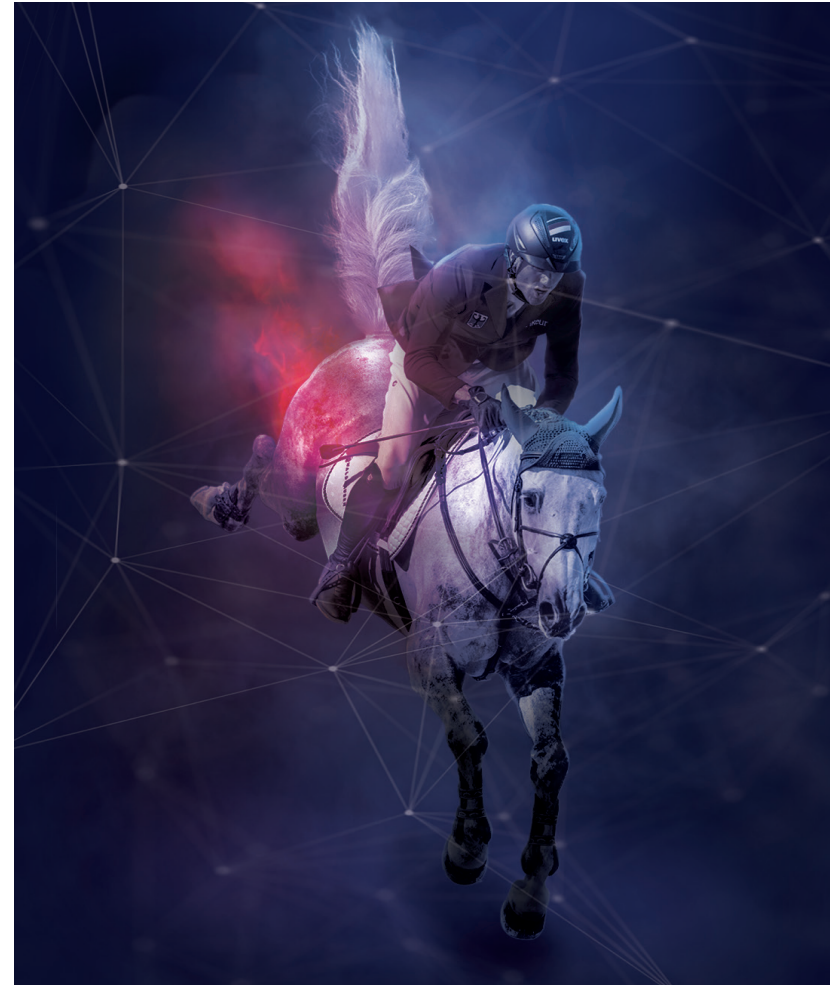
N3XT Sports is presenting The Fan-Monetization Data Feedback Loop, which demonstrates how learnings from the monetization of digital experiences via a scalable CRM solution can, in return, inform

the implementation of the organization's digital channels and overall content strategy to boost audience growth and continually convert fans into customers.

For example, using data feedback, sports organizations are: (1) leveraging their freemium video content to drive audience acquisition, as well as customer conversions, via social media and digital marketing; (2) personalizing their sponsorship and rights-holder partnerships to the organization's ticketing and ecommerce strategies; and (3) augmenting the stadium experience by bringing fans closer to in-stadia commercial partnerships via mobile.

Whereby digital transformation is serving sports organizations in different ways, their digital maturity shouldn't be measured solely on the breadth of their D2C portfolio, explains Hisham Shehabi, N3XT Sports' Chief Operating Officer (COO), but its ability "to serve consumers at every stage of the fan funnel" and "to discover new opportunities to maximize the value per fan".

"Whereas some rights holders own a diverse product portfolio, others are limited to the basic communications tools, such as social media and a weekly online newsletter," Hisham explains. "Nevertheless, what combines them isn't the number of digital touchpoints they own, but the frameworks in which their respective departments can leverage their D2C inventory and work together to convert fans into loyal, paying customers."





# 3. DIGITAL & DATA GOVERNANCE

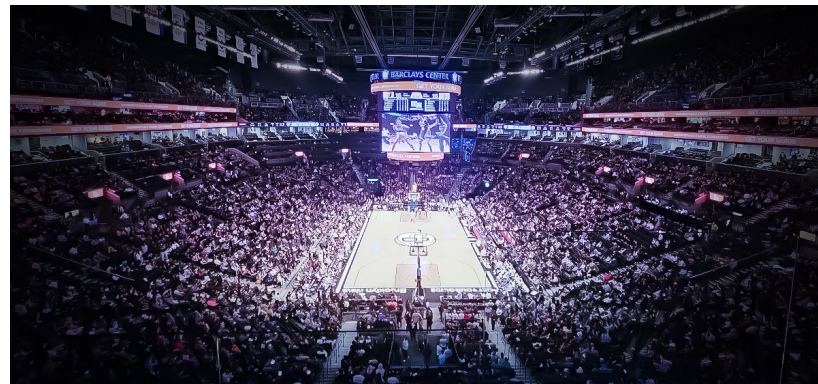
## THE EVOLVING SMART STADIUM | HOW SINGLE-USE STADIA LEVERAGE DIGITAL & DATA TO CHANGE WITH THE TIMES

The stadium, or arena, for a long time a mecca for sports fans, is continually responding to consumer demands, notably the shift to digital experiences. Whether that be how D2C technologies are serving fans on the terraces, or the ways rights holders augment their physical commercial attributes online, the sports venues themselves are undergoing significant upgrades in the age of digital fandom.

In traditional markets where legacy, single-use sporting venues have been established for decades, upgrading the infrastructure to cater to demands of the digital fan is one of the foremost challenges. Tayomara Gama, Regional Sport Lead for the global architecture firm Gensler, says that “budget restraint is a prominent restriction to the modernization of legacy sports venues”, though the biggest barrier is often understanding “how stadium development serves their business objectives” and its “capacity to drive revenues while at the same time reducing operational costs”.

These are important focuses for stadium projects in emerging sports markets, too. However, whereas the upgrade of historic stadia infrastructure requires a deft touch, sports properties in regions with ambitions to grow their sporting infrastructure “own the capacity to develop truly scalable stadia, designed to serve their fans, stakeholders, and athletes for years to come”, and are well-placed to adapt to future technology trends – something maturer markets are looking to replicate within their legacy infrastructure.

“While the modernization of historic stadiums built on legacy systems can be costly, unlike emerging regions whose fan bases are a fraction of the size, traditional operators have been able to draw on a plethora of user data and fan feedback to map out the venue’s necessary upgrades and which ones their fans want stadium owners to prioritize,” Tayo continues. “That starts with an ability to truly understand what the rights holder’s fans and stakeholders want from the stadium and knowing what data they need, the information that is already at their disposal, and to identify how changes can be applied to the stadium experience,” Tayo adds.



Data management and the ability to collect and ingest fan information is an important resource for improving the stadium experience. To achieve this, sports organizations are integrating new digital and data touchpoints that both enhance and provide greater insights into the in-stadia fan experience. They are bringing in the support of specialist digital transformation partners to help navigate this transition.

As a result, digitally sophisticated stadiums and their owners are heightening the rights holder’s commercial appeal while enriching the fan-stakeholder

relationship. Meanwhile, digital offerings such as mobile ticketing and concessions advocate a frictionless, omnichannel fan experience. For existing single-use stadia, in order to understand where these opportunities lie, this process requires firstly a thorough assessment of the stadium owner’s digital capabilities, how they might be used across its physical infrastructure, and barriers that their venue’s legacy systems might be creating when it comes to augmenting the stadium’s commercial functions.

“Clubs and event organizers are advocating the development of smart stadia to

enhance the fan experience and augment their revenue generation,” explains Hisham Shehabi, N3XT Sports Chief Operating Officer (COO). “As fans demand more digital experiences, sports properties must treat their stadium infrastructure like a digital asset, considering the overall data architecture before signing up vendors and tech providers that may be siloed. A full view of the fan journey is needed across all touchpoints in the venue, to improve their experience, operate efficiently and maximize revenue.

“A feasibility study conducted by companies such as Gensler, with the support of N3XT Sports, provides a comprehensive overview of a stadium’s technology stack,

how it links to the organization’s other digital assets, and next steps for development. By consolidating how a stadium ingests and collates customer data offers the rights holders a grounding for understanding the in-stadium experience and clear focal points for making meaningful upgrades.”

Thereafter, major stadium projects undergo multi-phase developments mapped out to allow for future upgrades that align with consumer trends; some spanning decades to ensure that the stadium is given time and space to evolve with the times and to maximize their commercial uses.

In emerging, highly ambitious markets, this approach is essential, too, with a

thought to how stadiums will impact their communities today and during years to come. By way of example, the New Murabba Development Company published plans for the development of a future-proof, multi-purpose football stadium in downtown Riyadh and is one of 11 submitted as part of Saudi Arabia’s 2034 men’s FIFA World Cup bid. According to reports, the stadium will leverage technology to create “an immersive and personalized fan experience”, and will be adapted for major events beyond sports, acting as a “vibrant community hub” after the tournament.

In general, MENA sports properties which are building stadia on a large scale “hold potential to reimagine the role of the stadium within the region’s rapidly changing urban landscape”, according to Tayomara. “Sports and entertainment can be a catalyst for change,” Tayo continues. “The stadium is an extension of the local economy, the industrial and commercial infrastructure, and can help re-generate local communities. Technology is being used to diversify the role of the stadium, the different sports and events it caters to, and how it engages the local demographic.”

#### **AUTOMATION IN SPORTS | HOW AI AND AUTOMATED PROCESSES SERVE THE MODERN SPORTS EXECUTIVE**

Amid the popularization and proliferation of public-facing AI properties such as ChatGPT and Microsoft’s Copilot, there

are other avenues where automation is serving sports properties and their business acumen – in particular, the speed and accuracy in which employees are able to retrieve user data.

According to our CEO, Mounir Zok, with careful consideration, automated and AI-driven technologies “will become valuable tools for leveraging fan data”. Speaking on the impact business process automation (BPA) will have on the sports industry, Mounir highlights an increased demand among sports properties for automated processes, while N3XT Sports is already assisting several of our clients in exploring new use cases for AI implementation, including audience analytics, digital strategy, and information processing.

However, Mounir cautions that sports properties “won’t benefit from new digital solutions and the latest assistive technologies on the market” if they don’t first implement a clear data strategy, whereas N3XT Sports proprietary research demonstrates that disparities broadly exist in the way sports organizations and rights holders leverage their existing digital portfolios to capture fan data. The role of automation, he says, is making the user experience (UX) “more palatable” while also opening up “new spaces for innovation, product development, and commercial growth”.

In light of these developments and the multiple benefits AI will bring to the industry, as



sports properties explore ways to integrate machine learning applications into their digital infrastructure, there are also several challenges that still exist within the space and how entities industrialize the adoption of AI. As this trend accelerates, before deciding how and when to integrate AI into a technology stack, it is essential for sports properties to ensure that automated processes work with the highest accuracy and reliability across the entire organization, particularly when it comes to analyzing user data.

In response to the wide range of machine learning applications available to rights holders on today's market, N3XT Sports' AI solution N3XTAI makes information more accessible to its users and documentation faster to process. Our latest innovations will

investigate how AI and machine learning software solutions can be implemented within our clients' existing technology stacks, seamlessly, and help simplify the retrieval of user data at every level of the business.

"In order to continue growing audiences, equipping organizations with the resources and augmenting their use of fan data is proving invaluable to the sports industry's revolution," Mounir continues. "Our team of experts understands the sporting landscape and the latest technology and data trends deeply. As the industry continues to digitalize, it's our aim to guide our clients on their own digital transformation journeys and to help them make a positive change for their fans and stakeholders."

## N3XTAI, AS A SERVICE, WILL

- ▶ EXPLORE WAYS AI ADOPTION CAN BEST SERVE THE SPORTS ORGANIZATION
- ▶ IMPLEMENT APPLICATIONS THAT SPEED UP THE REVIEW OF INTERNAL DOCUMENTATION
- ▶ MAKE IT QUICKER AND EASIER TO SEARCH FOR INTERNAL DATA AND INFORMATION
- ▶ ALLOW PERSONNEL TO QUERY THE DATA DIRECTLY WITHIN A SECURE APPLICATION
- ▶ ENSURE ABSOLUTE RELIABILITY OF THE DATA AND INFORMATION AI GENERATES





# 4. AUDIENCE ACQUISITION & RETENTION

## WEB LOGINS | HOW SPORTS ORGANIZATIONS MAXIMIZE CUSTOMER LOYALTY VIA A CENTRALIZED FAN EXPERIENCE

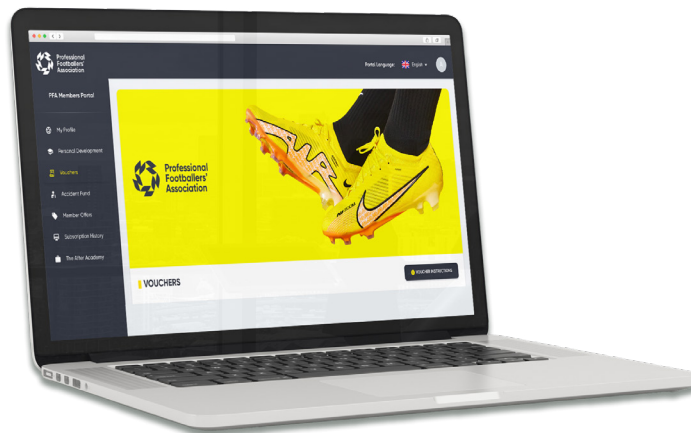
While data ownership may be the north star for many organizations, digitalization isn't simply a process of product accumulation. Some of the most digitally mature and data-rich sports organizations include those that take a considered approach to choosing the consumer touchpoints they adopt within their digital growth strategy and, importantly, understand how digital adoption bridges their fan-marketing funnel to serve their commercial goals.

Digitalization is far-reaching, meaning it can serve a multitude of purposes depending on the state of an organization's current frameworks. For example, mobile app ownership has proven to be a valuable step for consolidating a portfolio of D2C products into an omnichannel experience and presents a platform for sports entities to expand their existing digital portfolios.

Nevertheless, while mobile-product development provides a viable solution for navigating the next steps to one's digital transformation journey, its vital that an

organization also has the infrastructure in place to ingest, store, and distribute customer data without causing disparities within the organization's data management. This can be supported by integrating a CRM solution that gives its workforce and leadership a 360° view of the digital-fan community.

products via a single sign-on (SSO). This is demonstrated by a high percentage of professional English football clubs which have incorporated a web login into their fan ecosystem and is more popular among clubs in the Premier League top-flight compared to other UK-based club competitions.



For some industry benchmarks, the introduction of a universal web login is also a natural progression, designed to streamline the fan experience by allowing fans to access all of their digital

By way of example, research for our *Digital Transformational Regional Market Report 2024 | UK* shows that, at the time of its publication in May, 90 percent of Premier League clubs use a web login to

centralize the fan experience – of which, 88.9 percent utilize an SSO compared to 70 percent of all Premier League clubs. By compassion, the research also shows that as few as 36.4 percent of UK clubs analyzed have made their data touchpoints accessible via a web login – of which 60 percent utilize an SSO.

Meanwhile, fan loyalty programs are well established among the UK's elite club leagues. For example, at the time of publication, our research showed that the majority of clubs across the first-class County Championship cricket competition (100 percent), the Premier League (100 percent), tier-two EFL Championship football (79.2 percent), as well as the Premiership Rugby (70 percent) and the Super League (83.3 percent) rugby union and rugby league codes all incorporate loyalty benefits and sponsorship perks within their dedicated membership packages.

This indicates an intention among professional UK sports clubs to monetize their digital portfolios and, in many cases, integrate their sponsors and commercial stakeholders into the digital fan ecosystem. Albeit owning their own dedicated loyalty programs, as few as 36.4

percent activate membership products within a universal web login, and only 25.5 percent are accessible via an SSO, meaning that the majority of professional clubs in the UK have yet to optimize their commercial assets and sponsored fan experiences across their entire digital portfolio.

In order to customize the fan experience, sports clubs, leagues, and federations must first be able to define their different types of fans within their channel matrix, which is used to outline the types of content and fan experiences they should be providing across each of their digital assets. This helps executives to customize their organization's fan funnel, including: (1) the development of a digital strategy designed to convert peripheral fans into loyal subscribers; (2) opportunities for personalizing the fan experience based on user data; and (3) a clear plan for monetizing its digital, subscription-supported products at different stages of the funnel.

## COMMUNITY BUILDING | HOW SPORTS FEDERATIONS INCORPORATE PLAYER DATA INTO THE FAN FUNNEL

While cleaning and consolidating multiple sources of user information is an important step, there will come a point when a sports organization or rights holder will decide how to segment the types of data at their fingertips. Several N3XT Sports clients have created member portals to manage athlete

and stakeholder data, while others are focused on enhancing the digital fan experience and personalizing their D2C products based on unique user behaviors. For some organizations, this presents an opportunity to combine every user via a centralized information system no matter whether they are a one-off fan or an athlete currently competing in one of their elite competitions. At the heart of this, several sports properties see the chance to build a digital "community" featuring both athletes and fans – many of whom also participate in the sporting disciplines they also love to watch.

World Triathlon, by way of example, is undergoing a thorough data migration process, with the support of N3XT Sports, that looks to bring together its athlete, fan, and stakeholder data. Speaking on the rationale behind this decision, alongside its major events, N3XT Sports Chief Operating Officer (COO) Hisham Shehabi explains that the International Federation (IF) is creating a digital community that "embodies the triathlon lifestyle" and its different disciplines, drawing on all its user data to inform its D2C strategy and drive commercial growth.

Community building is becoming a popular avenue for IFs and elite sports organizations undergoing digital transformation. By way of example, the International Tennis Federation (ITF), which owns one of the most diverse digital portfolios within the Olympic Movement, grants subscribers their very

own ITF World Tennis Number (WTN) as part of its registration process and is used by more than 1.7 million tennis players around the globe.

Its role is to make it easier for players to find an opponent of a similar ability, to monitor their own progress, and enhance the ITF's CRM capability by helping the federation to connect fans who play tennis with its D2C products, competitions, and digital content.

Elsewhere, the International Basketball Federation (FIBA) is also growing its audience this way. Among its data-collection touchpoints, FIBA 3x3, the organizing body for 3x3 basketball, collects player data via its dedicated Play platform, which welcomes users to create a profile "visible to the 3x3 family around the world" and participate in local events.

As properties discover new ways to reconfigure their operational systems to generate more value from their data, for some, data ownership has become a key feature within their technological development strategies and means that it is no longer enough simply to expand their D2C portfolios without first understanding how they connect an ecosystem of fans, athletes, and stakeholders, while also serving to improve dataflow.

As outlined in our *International Federation Fan Data Guide 2024*, the Union Cycliste Internationale (UCI) leverages its My World of Cycling fan reward platform,



which invites cycling fans to participate in online quests and quizzes, so as to earn points and the chance to win UCI prizes. As part of the UCI's ongoing digital transformation, N3XT Sports is helping to develop a new, scalable information system that consolidates all of the federation's competition, athlete, and sport data – while also engaging more people in the cycling community.

Adrien de Cheveigné, the UCI's Head of Digital Transformation, says that data will grant the federation unique insights across its cycling communities and present its users with the ability to personalize their digital experience, including via its My World of Cycling platform. "By developing a centralized information system," Adrien says, "we are able to ensure that every race event, result, and ranking is accounted for, while also managing our fan relationships – many of whom are cyclists themselves – within our database, so as to offer them a unique proposition."

# 5. INDUSTRY BENCHMARKING

## 'ADVANTAGE DIGITAL' | WIMBLEDON'S FAN-DATA STRATEGY & OTHER GRAND SLAM TENNIS BENCHMARKS

The oldest tennis tournament in the world, the Wimbledon Championships is one of the more digitally mature major events on the sporting calendar. According to research for our *Digital Transformation Regional Market Report 2024 | UK*, the event's organizer, the All England Lawn Tennis & Croquet Club (AELTC), is among the top three rights holders in its domestic market, based on its digital transformation efforts, and the top five for its respective digital and data-maturity levels.

N3XT Sports research is carried out with the sole purpose of highlighting the benchmarks and opportunities for sports properties to digitalize and follows a unique methodology focused on the breadth of each entity's digital portfolio, their ability to collect first-party fan data, and social media presence. Each category offers a maximum of 10 available points (see graphic), while the organization's overall score represents an average of its three category scores converted into percentages.

Tennis is a consumer staple, which can be demonstrated by the sport's investment

DIGITAL PRODUCTS	SCORE
WEBSITE	1 PT
MOBILE APP	2 PTS
ECOMMERCE	1 PT
TICKETING	1 PT
OTT / STREAMING	3 PTS
FANTASY / GAMING	2 PTS

in the vast array of D2C fan experiences among its Grand Slam events, as well as the popularity of the sport via its digital and social media platforms. Albeit a driving force when it comes to digital product development, the sport holds opportunities to improve its data-collection capabilities across the board, particularly when it comes to its tournaments organizers' first-party fan-data collection and consolidating data strategies across multi-stakeholder events.

As professional tennis continues to digitalize the fan experience and continuing N3XT Sports' proprietary research, carried out in April 2024, our team highlighted

DATA COLLECTION	SCORE
WEB LOGIN / NEWSLETTER	1 PT
MOBILE APP	1 PT
ECOMMERCE	1 PT
TICKETING	1 PT
OTT / STREAMING	2 PTS
FANTASY / GAMING	1 PT
SSO	3 PTS

how tennis' four Grand Slam tournaments are re-imagining their digital product portfolios and, importantly, which of the event organizers are setting benchmarks for their fan-data collection.

### AUSTRALIAN OPEN – OVERALL SCORE 76.7%

The Australian Open, organized by Tennis Australia (TA), scores highly for its D2C product portfolio, which includes a dedicated website, mobile app, ecommerce and ticketing platforms, video-streaming offering, and gaming/fantasy product. However, while equal to its peers for its digital-maturity level, the event receives the lowest score

SOCIAL PRESENCE	SCORE
CHANNELS	1 - 5 PTS
> 10 M	5 PTS
10 - 3 M	4 PTS
3 - 1 M	3 PTS
1 - 0.5 M	2 PTS
< 0.5 M	1 PT

for its first-party fan-data collection, and is one of two Grand Slam tennis tournaments, including the US Open, not to utilize an SSO across all its data touchpoints.

Similar to the US Open, which is also organized by its national governing body, Tennis Australia collects first-party fan data across web, ecommerce, and ticketing, albeit does not do so via its mobile app or its video content. Notably, the Australian Open operates the Infosys Bracket Challenge fan-predictor game, which requires the user to sign up using either a Google or Amazon login. Users also require a separate login to access the tournament's online shop.



## FRENCH OPEN – OVERALL SCORE 93.3%

The French Open, organized by the FFT, also known as Roland-Garros, scores highest for its data maturity of the four tennis Grand Slam tournaments. According to N3XT Sports research, while every event analyzed owns a diverse D2C portfolio and broad social media presence, the FFT allows fans to access all its data touchpoints across multiple tournaments, including Roland-Garros, using an SSO.

The dedicated FFT web login is integrated across the tournament's dedicated website, mobile app, ecommerce and ticketing platforms, as well as the RG

Fantasy Game by Infosys, and can also be used to access the federation's Ten'Up and Paris Masters tournament platforms. Albeit the highest scorer for its digital transformation, the FFT still holds capacity to expand its data capture by enabling subscribers to access exclusive content via its video-streaming offering.

## WIMBLEDON – OVERALL SCORE 90%

The Wimbledon Championships, organized by the All England Club, rivals Roland-Garros and the FFT for both its digital and data-maturity levels. In contrast to the French Open, the tournament and event organizer collects first-party fan data separately from the Lawn Tennis

Association (LTA), the governing body of tennis in Great Britain. By comparison, the Wimbledon Championships allows fans to log into all its data touchpoints using the myWimbledon web login and SSO, including via social media.

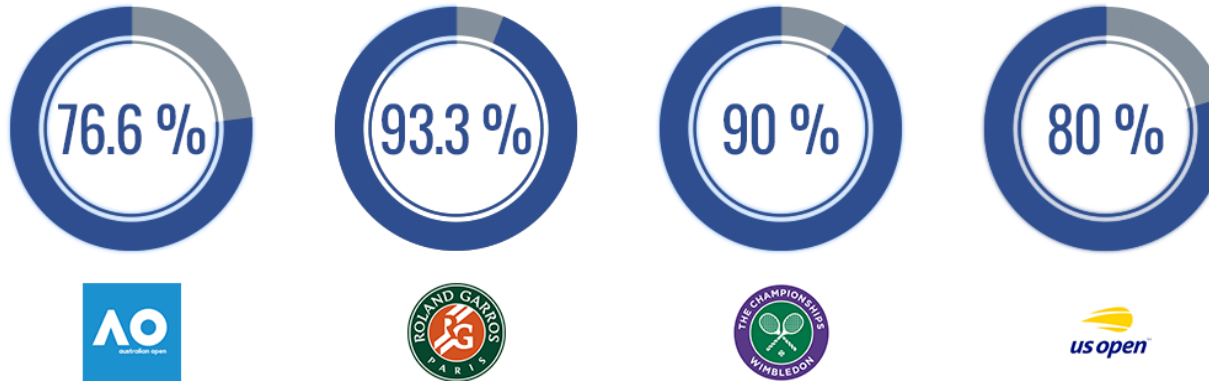
Nevertheless, although Wimbledon provides an equally diverse D2C portfolio, including a dedicated website, mobile app, and its own ecommerce and ticketing platforms, the tournament does not collect first-party fan data via its video-streaming offering nor via its numerous fantasy/gaming activations, including its Wimbledon Smash mobile game. While every sports organization is different and tailors its digital and data

strategies to their respective audiences, the Wimbledon Championships also holds the capacity to augment its fan-data collection.

## US OPEN – OVERALL SCORE 80%

The US Open, organized by the United States Tennis Association (USTA), also receives a maximum score for its D2C product portfolio, which provides fans access to the dedicated US Open website, mobile app, ecommerce and ticketing platforms, as well as a video-streaming capability and fantasy/gaming product.

Although the USTA owns a web login, this is not active across its US Open properties,



## GRAND SLAM TENNIS DIGITAL ANALYSIS

while the event's data touchpoints are limited to web, ecommerce, ticketing, and its Million-Dollar Bracket Challenge fan-predictor game, presented in partnership with the USTA's technology partner IBM.

Unlike the FFT and AELTC, according to the research, the USTA does not yet provide access to its data touchpoints via an SSO, which would help serve the tennis fan with a seamless experience and consolidate USTA fan data across its customer-facing platforms. This would present the US Open with a strong foundation for enhancing its data-collection capability and inform the delivery of personalized D2C experiences to every fan.

**MILANO CORTINA 2026 | ASSESSING THE WINTER OLYMPIC MOVEMENT'S FAN-DATA STRATEGIES**

As the sun sets on the Paris 2024 Olympic and Paralympic Games, and the summer spectacle's International Federations (IF) turn their focus to Los Angeles 2028 (LA28), audience attention will be thrown to the Milano Cortina 2026 Winter Games, which will mark the first time in Olympic and Paralympic history that the two events are formerly hosted by two regions.

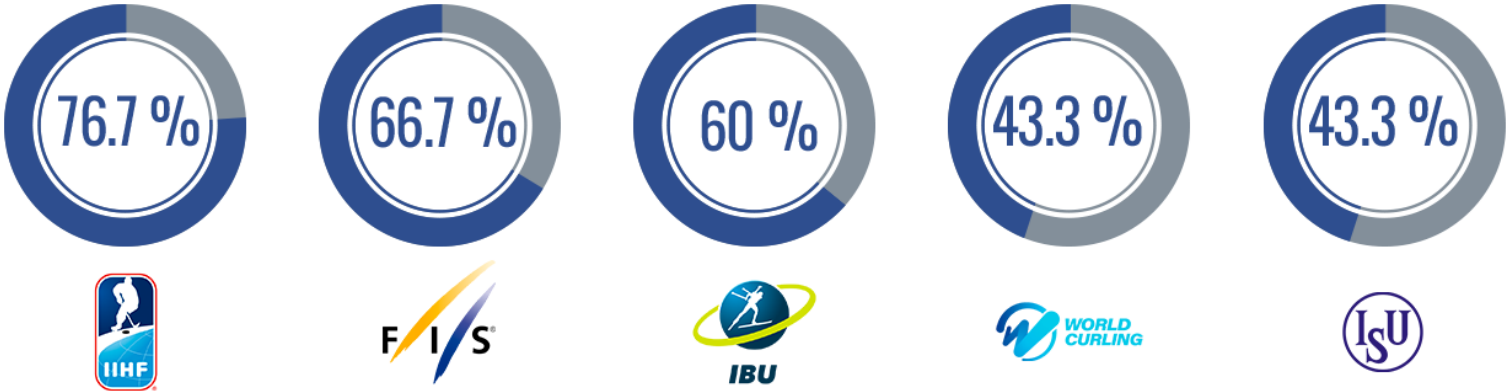
The Winter Games will also represent a milestone for its sporting disciplines, and their respective IFs. For example, this is pertinent within their drive to nurture digital

audiences and higher engagement levels, which peaked during Beijing 2022 across the International Olympic Committee's (IOC) digital channels, while global streaming audiences grew exponentially during the Beijing 2022 Opening Ceremony over Pyeongchang 2018.

Speaking on the subject during the last winter edition, the outgoing International Olympic Committee (IOC) president Thomas Bach said, at the time, that digitalization was having a "profound effect" on the way fans engaged with winter sports. Going forward, the Olympic Movement is hurtling towards a new age of digital consumption – highlighted by N3XT Sports proprietary research for the *Olympic Digital*

*Transformation Report 2023*, published in September 2023, which outlines the digital and data maturity of the Paris 2024 Olympics IFs.

According to our latest research, whereas the majority of Summer Olympic IFs (80.6 percent) collect first-party fan data, only 50 percent do so via multiple digital touchpoints, highlighting a disparity in their data-collection capabilities. By comparison, although a lower percentage of Winter Olympic IFs (75 percent) collect first-party fan data, 62.5 percent do so via multiple touchpoints, whereas fewer Winter Olympic IFs do so via D2C platforms such as mobile apps, ecommerce, and over-the-top (OTT) video streaming.



**MILANO CORTINA 2026 DIGITAL ANALYSIS**

Meanwhile, Summer Olympic IFs demonstrate a higher maturity when it comes to data consolidation, whereby fewer Winter Olympic IFs collect fan data via an SSO and utilize a web login to streamline the fan experience. Meanwhile, the Summer Olympic IFs whose sporting disciplines were on show at Paris 2024 demonstrate a higher average maturity for their digital and data capabilities, outlining an opportunity more broadly for Winter Olympics IFs to digitalize. Albeit fewer IFs are responsible for the array of sports on display at the Winter Games, by comparison, a higher

percentage of the Winter Olympic IFs collect fan data via a dedicated newsletter (62.5 percent), mobile app (37.5 percent), and their own online fan-predictor games (37.5 percent) compared to our Summer Olympic IF analysis.

**INTERNATIONAL BIATHLON UNION**  
OVERALL SCORE 60%

The International Biathlon Union (IBU) is the only Winter Olympic IF assessed to score higher for its data collection (60 percent) than its digital products (50 percent), demonstrating a strong data framework,

supported by a unique web login, as well as the IBU's ability to optimize fan-data collection across its entire D2C portfolio.

Despite owning fewer digital touchpoints than some Winter Olympic IFs, including a dedicated website, mobile app, and online fan-predictor game, the IBU is the only governing body assessed that collects first-party fan data across all its digital products – not only its data touchpoints – and to do so via an SSO. This presents the IBU with an opportunity to expand its digital offering without causing data silos or fragmenting the fan experience.

**INTERNATIONAL BOBSLEIGH  
& SKELETON FEDERATION**  
OVERALL SCORE 23.3%

The International Bobsleigh and Skeleton Federation (IBSF) has yet to integrate a fan-focused digital-product offering into its ecosystem while the governing body's digital portfolio focuses on athlete rankings and race results. The IBSF also offers its members access to its dedicated Athlete Hub. While the IBSF does distribute video content via its website, it is imported via the governing body's dedicated YouTube channel, and therefore does not cater for the collection of first-party fan data via a dedicated video-streaming product.

**WORLD CURLING - OVERALL SCORE 43.3%**

The World Curling Federation's (WCF) digital products score (40 percent) falls below the Winter Olympic IF average, though scores slightly higher-than-average for its fan-data collection (30 percent). Within its D2C portfolio, the WCF collects first-party fan data via its website and the Curling Channel streaming service, though it does not yet own a dedicated mobile app, ecommerce platform, ticketing portal, or fantasy/gaming product.

Going forward, the governing body could benefit from an assessment of its data touchpoints and to consider areas where it can leverage unique fan data and its breadth of video content to boost audience

WINTER OLYMPIC INTERNATIONAL FEDERATION DIGITAL TRANSFORMATION TABLE					
WINTER OLYMPIC IF	DIGITAL PRODUCTS	DATA COLLECTION	SOCIAL REACH	OVERALL	AGG
1.INTERNATIONAL ICE HOCKEY FEDERATION	90%	60%	80%	76.7%	
2. INTERNATIONAL SKI AND SNOWBOARD FEDERATION	80%	40%	80%	66.7%	
3. INTERNATIONAL BIATHLON UNION	50%	60%	70%	60%	
4. INTERNATIONAL SKATING UNION	40%	30%	60%	43.3%	DATA
5. WORLD CURLING	30%	20%	80%	43.3%	
6. INTERNATIONAL LUGE FEDERATION	30%	10%	60%	33.3%	
7. INTERNATIONAL BOBSLEIGH AND SKELETON FEDERATION	10%	0%	60%	23.3%	
8. INTERNATIONAL SKI MOUNTAINEERING FEDERATION	10%	0%	50%	20%	



engagement via its digital and social media channels, helping lay the foundations for, in time, further digital expansion.

### **INTERNATIONAL ICE HOCKEY FEDERATION** OVERALL SCORE 76.7%

The International Ice Hockey Federation (IIHF) receives the highest score for its digital products (90 percent) and data collection (60 percent) among the Winter Olympic IFs assessed. The governing body provides access to the IIHF Fan Zone across its mobile app, ticketing pages, and online fan-predictor game, and is well-placed to expand its audience reach and subscriber retention within a centralized fan-data ecosystem.

According to our research, the IIHF has yet to maximize its data-collection capabilities across its entire D2C portfolio, hence

why it scores lower for data collection versus digital products. Nevertheless, unlike many governing bodies across the Olympic Movement, the IIHF owns a strong foundational framework for optimizing dataflow and enriching the fan experience.

### **INTERNATIONAL SKATING FEDERATION** OVERALL SCORE 43.3%

The International Skating Union (ISU) scores lower-than-average for its digital products (30 percent) and data collection (20 percent). While the governing body owns a dedicated website and mobile app, its data collection is focused on newsletter signups, which are made available to users via both web and mobile.

Nevertheless, the ISU does have a significant social media following across multiple channels and disciplines, positioning

the governing body for further digital expansion. It also holds the opportunity to introduce personalization features, based on its different disciplines, and to segment the distribution of video content across its subscriber base. Within the ISU mobile app, the federation allows users to personalize their experience by selecting their favorite athletes.

### **INTERNATIONAL LUGE FEDERATION** OVERALL SCORE 33.3%

The International Luge Federation (FIL) also scores lower-than-average for its digital products (30 percent) and data collection (10 percent). Its primary source of fan data is collected via the FIL Luge Predictor Game, which offers winners a selection of prizes, while the governing body could benefit from introducing other fan-data subscription touchpoints via its dedicated website.

Although the FIL provides in-event live streams to its digital audience, the governing body does this via its dedicated YouTube channel, and therefore does not yet cater for the collection of first-party fan data via its video content.

### **INTERNATIONAL SKI & SNOWBOARDING FEDERATION** - OVERALL SCORE 66.7%

The International Ski and Snowboarding Federation (FIS) receives the second-highest score for its digital products (80 percent), though comes third for its data

collection (40 percent), highlighting a disparity between its digital and data maturity levels. Within its diverse D2C portfolio, the FIS collects first-party fan data via its dedicated website, FIS TV streaming service, and FIS Gaming Zone.

While the FIS mobile app provides users with a centralized experience, including access to video streaming, live results, and personalization features, users are not required to log into the application. This offers the governing body an opportunity to build, in time, an omnichannel experience that serves the consolidation of first-party fan data across web, mobile, video streaming, and fantasy/gaming.

### **INTERNATIONAL SKI MOUNTAINEERING FEDERATION** - OVERALL SCORE 20%

The International Ski Mountaineering Federation (ISMF) will make its debut at Milano Cortina 2026, making it the newest inclusion to the Winter Games. The governing body's digital transformation is naturally in its infancy and is demonstrated by its low score within our research.

As emerging sports bodies seek to generate audience engagement and subscriber retention, it's vital that federations such as the ISMF identify opportunities to implement data touchpoints within their digital ecosystems, so as to convert peripheral viewers into loyal fans in time for when its disciplines are showcased on the world's biggest stage.



# WHAT'S N3XT?



**MOTASEM EL BAWAB**  
CIO AT N3XT SPORTS

To be an efficient, sustainable, and competitive business in today's sports market, it's no longer enough to host the best athletes and world-class events. As the industry digitalizes, it's vitally important to innovate effectively to meet commercial goals and ensure your company is "future-ready" amid the surge in digital audiences and the influx of new technologies.

For the same reason, sports organizations and rights holders have sought to expand their digital presence by diversifying their own direct-to-consumer (D2C) inventories. While this has helped boost fan engagement by augmenting the owned "fan-funnel", this has left many sports properties with siloed and costly data pools, caused by their disconnected technological ecosystems.

To remedy this problem and iron out these costly processes, just as other industries

are charging ahead with investment in AI solutions to optimize productivity on the shop floor, in the wake of the Covid pandemic, the sports sector is also exploring new use cases for AI to help boost internal workflows and reduce operational spend while maintaining audience and commercial growth. This is a reality which is easier to reach than many sports executives might realize, contrary to widespread belief, and with the right support is firmly within their grasp.

For our clients, whether it's through AI, automation, or digitalization, the goal is always the same: empower people, improve processes, and grow audiences. In the past three years, we've worked with several organizations to make this vision a reality, including – in one example – the implementation of AI-powered fan engagement platforms inside an International Federation (IF) to help increase awareness across its fan ecosystem and bring a younger audience into its subscriber base.

Others have adopted AI solutions to increase their proficiency in data-driven decision-making, to improve event logistics, and reduce operational costs. These are just a few examples of how AI

technology, when used properly, can make a tangible difference.

As organizations become more accustomed to their audience and what drives audience engagement, to stay ahead, they are learning that it isn't enough to integrate the latest technologies alone, including AI solutions, but to understand how solutions on the market can be used to deliver growth, increase efficiency, and solve real-world problems. Understanding how AI can support this transition is an important step towards building a cost-effective sports business.

N3XT Sports provides training and awareness programs for its clients to help them explore how AI and machine learning can be implemented in their business processes. This includes challenges surrounding AI adoption and governance, helping our clients better understand how to customize AI solutions to their business needs, and steps to building a tailored AI strategy.

As part of any consultation process, our experts will:

- Evaluate your current technology stack to identify whether your infrastructure

is up to date, where it can be adapted to the organization's future needs, and how it can be optimized.

- Highlight how AI and automation can streamline operations, reduce costs, and uncover new revenue streams. This must be done thoughtfully – focused on real-world problems like fan engagement, event management, and athlete performance analytics

- Identify the best service provider to meet your business needs. You don't have to do this alone. By collaborating with experts in sports technology and AI, our team helps connect the sports industry with trusted and proven technology suppliers.

By harnessing machine-learning models, sports properties at every level can uncover deep insights, while sports organizations and rights holders that effectively integrate AI technology can become more cost-effective, commercially viable, and attractive to investors. As part of this process and within our end-to-end digital transformation service, our consultants are ready and available to talk through your unique operational needs and how AI can support your business.

# ABOUT N3XT SPORTS?

N3XT Sports is a specialized agency in the sports industry that works with its clients on strategy development, operational support, and end-to-end data and digital transformation.

Our team has delivered hundreds of projects to date in various geographies, contributing to several topics related to sports commercialization, digitalization, development, investments, sports formats, performance and beyond.

With its operational HQ in Valencia, Spain, and its MENA office in Riyadh, Saudi Arabia, N3XT Sports is strategically positioned to drive innovation and excellence in the sports industry.

We invite you to use, share and build upon the insights and statements made in this report. You are free to distribute the material in any medium or format, including within your organization, to your stakeholders and to students or universities.

You can contact the N3XT Sports team through [info@n3xtsports.com](mailto:info@n3xtsports.com) to gain further understanding of the insights presented in this report, particularly as it pertains to engaging in the development and implementation of a digital transformation strategy.

This report was produced as part of the N3XT Sports Reports series, made freely available to the sports industry.

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