

N3XT SPORTS

SEPTEMBER 2023



OLYMPIC DIGITAL TRANSFORMATION REPORT 2023

FOREWORD



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CHIEF OPERATING OFFICER
N3XT SPORTS

Hisham Shehabi

We're a privileged group; those of us who serve the sporting community. Such is the appreciation for athletic performance, our roles as storytellers and innovators are made all the more meaningful when we are able to bring fans a sense of sporting occasion and the spirit of competition.

Needless to say, the world of sport does not stand still – and nor can we afford to rest either. So much has changed since the International Olympic Committee (IOC) elected to suspend the Olympic Games Tokyo 2020 at the eleventh hour, and the focus turned to how the Olympiad could go ahead safely in the wake of a global health crisis.

The disruption caused by Covid-19 forced governing bodies, professional leagues, and clubs to reconsider the business model and has brought about an urgency for rights holders and sports organizations to digitalize. Out of times of uncertainty came a new way to think about the fan experience. Looking to the Olympic Games Paris 2024, the organizing committee's innovation drive will mark the beginning of a new era of Olympic fandom.

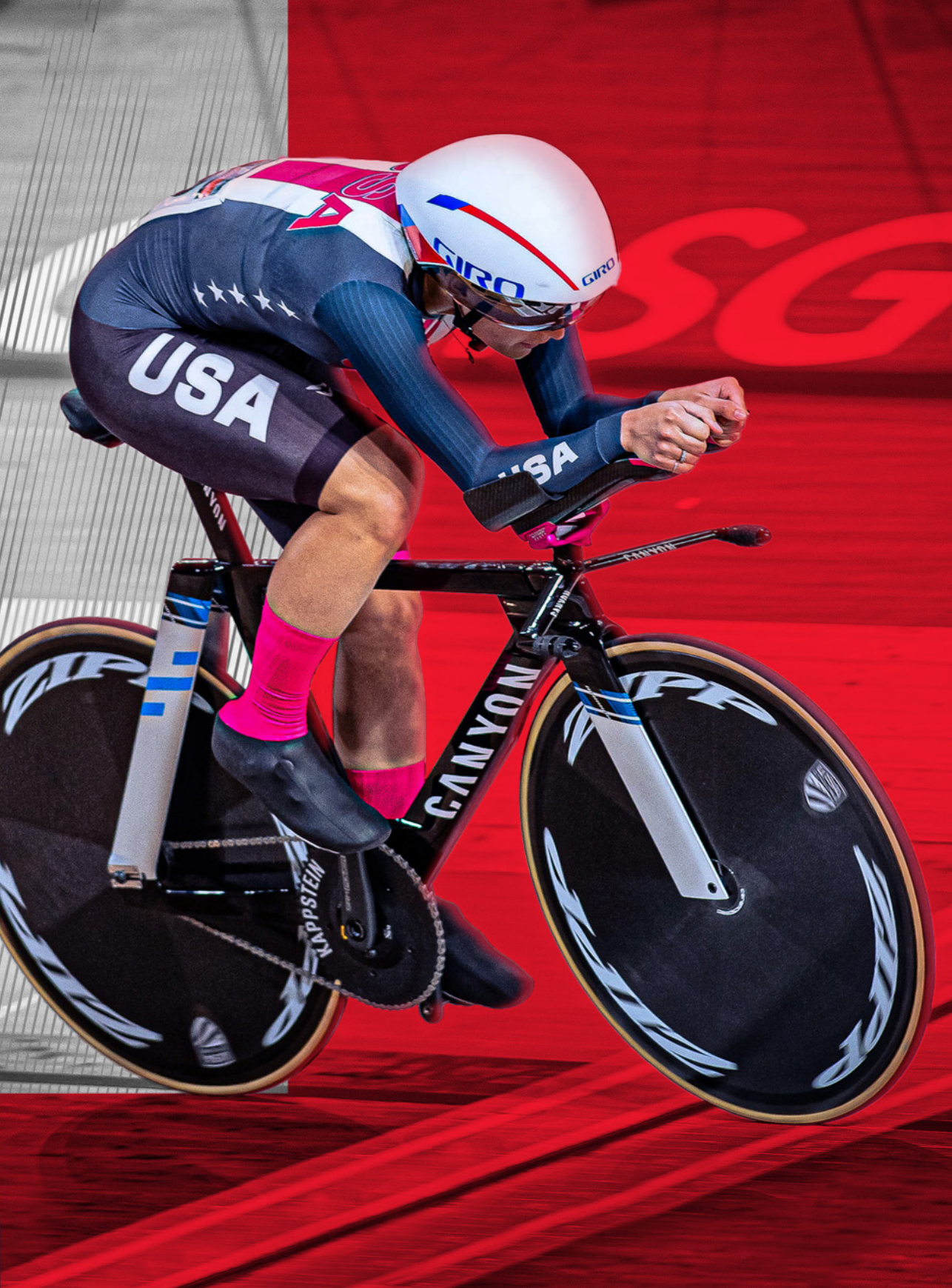
Nevertheless, the Olympic Movement's digital transformation is still in its infancy compared to other sports sectors. Our experts at N3XT Sports conducted a thorough examination of the International Federations (IF) and the sports that will be represented at next year's Summer Olympics – to find that just over one in five (21.8 percent) do not collect first-party fan data via an owned digital platform.

On the face of it, this might be expected given that governing bodies are at different stages of their own digital transformation journeys – yet it also raises concerns for the sports on the Olympic roster and what their futures entail, especially considering the speed at which privately-owned leagues and clubs, and other governing bodies are bringing their own digital products to market. By comparison, all of the 32 member associations (MA) represented at last year's Qatar 2022 men's FIFA World Cup capture first-party fan data in some shape or form, while close to two-thirds (65.6 percent) of the MAs do so via multiple digital touchpoints.

We're experiencing a dramatic shift towards digital sports consumption. This presents the Olympic Movement with an opportunity to drive digital engagement, as outlined under the IOC's *Olympic Agenda 2020+5* recommendations, and the prospect of raising the commercial appeal of its respective Olympic stakeholders through the power of digital transformation.

This approach grants IFs, NOCs, and their respective member organizations the ability to capture first-party user data that: (1) deepens their understanding of the fan and what drives engagement; (2) uncovers new digital revenue streams based on unique user behavior; and (3) informs new sponsorship and media rights opportunities based on fan intelligence. In this report, we welcome expert analysis from: **Gordon Templeman**, United World Wrestling's (UWW) Director of Commercial Operations and Communications; **Rita Pivoriunaite**, UWW's Marketing Manager; **Adrien de Cheveigné**, Head of Digital Transformation for the Union Cycliste Internationale (UCI); **Fergus Murray**, World Triathlon's Head of IT and Broadcast; and **Olalla Cernuda**, World Triathlon's Communications Director.

With additional commentary from our Chief Information Officer (CIO) **Motasem El Bawab** and Project Management Office (PMO) Director **Lara Ammar**, N3XT Sports is excited to support the Olympic Movement on its digital transformation.



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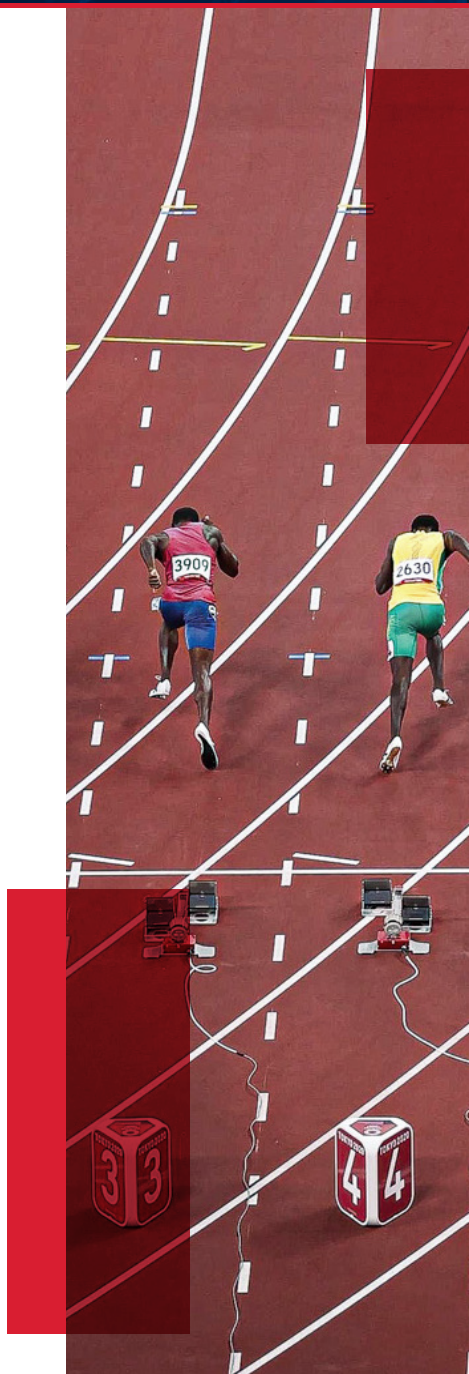


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WHAT'S N3XT?

1 INTRODUCTION

The message was clear – even in the absence of fans due to Covid-19 restrictions, Tokyo 2020 heralded a **“new era”** for the Olympic Games and its ability to drive engagement via different means. In its post-Games *IOC Marketing Report Tokyo 2020* review, the IOC declared the staging of the multi-sport event as the **“biggest step yet”** in the Olympic Movement’s digital transformation.

Thomas Bach, IOC President, concurred, writing **“billions of people around the globe were united by emotion, sharing moments of joy and inspiration”** in his opening remarks. Among its highlights, the Summer Olympics generated a record 28 billion digital video views, 23 billion viewing hours across its TV broadcasts and digital platforms, while surpassing 6.1 billion social media engagements.



Albeit an Olympiad like no other, it set a precedent for future Olympic competition and other opportunities for the Olympic Movement, too – including IFs, National Olympic Committees (NOC), Rights Holding Broadcasters (RHB), and TOP Partners – to explore new direct-to-consumer (D2C) strategies for increasing consumer appetite for Olympic sports between the Games, and to expand its digital footprint and audience reach in time for Paris 2024.



OLYMPIC GAMES PARIS 2024 STATS

6.8M **TICKETS SOLD** **ACROSS** **178** **COUNTRIES**

Figures correct as of May 2023

By the end of May 2023, 6.8 million tickets had already been sold for the Olympic Games Paris 2024 across 178 countries – with a record one million tickets having been purchased in 36 hours during the organizer’s second phase of ticket sales. As demand for the spectacle continues to grow, the Olympic Movement is primed for its own digital expansion – yet this is no time to rest on our laurels; there is still a lot of work to be done if next year’s Olympics are to reap rewards for the sports on display, of which only a handful demonstrate a strong digital maturity.

According to proprietary N3XT Sports research, just over one in five (21.8 percent) of the 32 sports bodies represented at Paris 2024 do not collect first-party fan data, while a quarter (25 percent) do not own a digital touchpoint beyond their dedicated web platform – meaning that the governing bodies for sports considered to be the pinnacle of athletic competition are not driving fan engagement as well as they could, nor will many IFs be equipped to retain audiences during the four-year cycle post Paris 2024 if they don’t accelerate the development of their digital ecosystem.

STATE OF PLAY

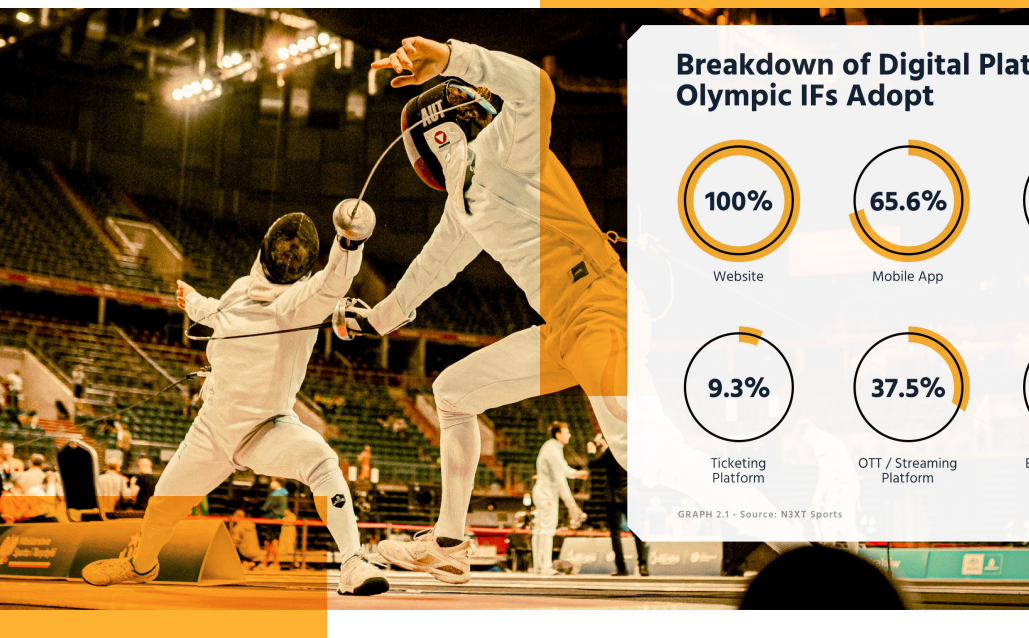
Governing bodies for sports considered to be the pinnacle of athletic competition are not driving fan engagement as well as they could, nor are many of them equipped to retain audiences post Paris 2024.



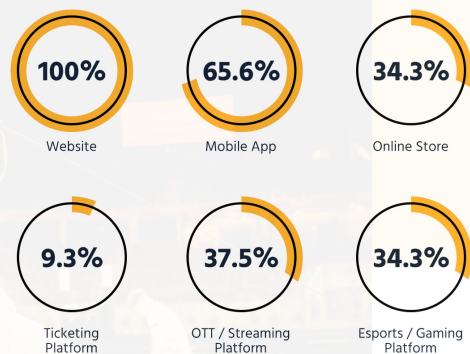
2 MOBILE ADOPTION CLEAREST AVENUE FOR OPTIMIZING THE FAN FUNNEL

There are many avenues which sports bodies can explore in order to broaden their audience reach. Among the most common, social media channels are a popular medium for IFs and National Federations (NF) to promote their respective sports and talent – while also acting as a platform to expose non- and peripheral fans to other events between Olympic Games.

Building a social media presence is a staple for the modern sports organization – though it is not enough to only drive *likes* and *shares* on a third-party platform to raise the digital maturity of an international sports body. Data ownership is paramount for developing a robust customer relationship management (CRM) capability and relies on the strength of the rights holder's owned and operated digital portfolio, and its ability to collect data via its various digital touchpoints.



Breakdown of Digital Platforms Olympic IFs Adopt



GRAPH 2.1 - Source: N3XT Sports

It is worth noting that close to two thirds (65.6 percent) of the Olympic IFs represented at Paris 2024 own at least one active mobile app – while more than a third of the field (37.4 percent) capture user data via their own mobile platforms. This is telling since most data among the Olympic federations are still captured via newsletter subscriptions and/or a web login (71.8 percent) – yet only 34.3 percent own an online store and as few as 9.3 percent own a dedicated ticketing portal, meaning that the majority of IFs are not yet optimizing the fan data they have at their disposal.

Therefore, as demand grows for multi-functional, streaming-based sports apps, there is a clear opportunity for the Olympic Movement to capture first-party fan data by augmenting the existing digital inventory, offering new touchpoints for ecommerce and ticketing, while drawing on behavioral data to personalize the fan journey from online to offline experiences.

CASE STUDY

FÉDÉRATION EQUESTRE INTERNATIONALE



The Fédération Equestre Internationale (FEI), the governing body for equestrian sports, owns an array of digital touchpoints, including multiple mobile apps designed for a range of different purposes. Among them, the FEI SportApp invites users to create their own personal FEI account and is tailored to every stakeholder, including FEI athletes, FEI officials and event organizers, horse trainers, owners, media, and the fans.

In order to optimize its existing digital platforms and information systems and increase fan engagement with equestrian sport, the FEI and its IT and Commercial departments are working alongside N3XT Sports to conduct an audit of the federation's digital ecosystem and optimizing all of its digital investment to ensure value is derived for FEI stakeholders.



Lara Ammar, N3XT Sports' Project Management Office (PMO) Director, highlights the value sports organizations draw from a detailed analysis of their digital framework when it comes to rolling out new digital platforms. **"Whenever we're building something new for a client, our aim as a PMO is always to help them to better understand how digital adoption fits to their existing operations and ways digitalization enhances the management of multi-stakeholder projects,"** she says.



Lara Ammar

PMO Director at N3XT Sports

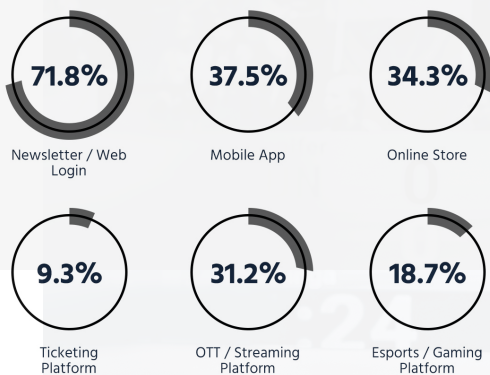
"For the federations among our growing Olympic client base, it's vital that the solutions they implement enhance the wider operation. In doing so, the integration of digital touchpoints, such as mobile apps, not only act as vehicles for collecting fan and stakeholder data, but to consolidate multiple data points and a foundation for digital expansion in the years to come."

3 DIGITAL DIVERSITY AN IMPORTANT STEP TOWARDS CAPTURING FIRST-PARTY FAN DATA

There is no sport that is truly alike, meaning that the fan experience is expected to differ across the competition spectrum. Nevertheless, there are certain elements of the digital inventories at a federation level that overlap – even

if they serve different purposes. While a modern sports body should not be without a dedicated web platform or mobile app, it is up to the individual entity to decide how to position its online presence to drive user engagement and, thereafter, to augment its digital portfolio.

Breakdown of Olympic IF Data-Collection Capabilities



GRAPH 3.1 - Source: N3XT Sports



At a basic level, a sports organization will invite users to subscribe to a newsletter and/or a unique user login. For context, close to a third of IFs represented at Paris 2024 (28.2 percent) do not yet offer fans a newsletter subscription and/or web login. However, there is no need to fret – this is an easy step towards establishing the fan journey and to lay foundations for the federation to generate fan intelligence, expand its digital inventory, and inform a personalized content marketing strategy for segmented audiences.

Be that as it may, there are other data sources which IFs could be utilizing. In order to scale, IFs can diversify their respective digital portfolios by developing an integrated strategy which leverages an omnichannel approach to fan engagement. In doing so, this helps to enhance the UX by streamlining the fan journey via a single, easy-to-use platform and to scale its digital offering without creating data silos. This, in turn, offers the opportunity to improve the employee experience (EX), too, by consolidating the collection and governance of fan data.

“When it comes to scaling a sports organization’s digital portfolio, it is vital that digital transformation also serves the workforce and its digital literacy,” explains Hisham Shehaby, N3XT Sports COO. **“By assessing the way the entity uses fan data and areas where it can be improved, organizations can strengthen their employees’ digital and communications skills with the adoption of software solutions that serve overall data consolidation and internal data management.”**

CASE STUDY

UNITED WORLD WRESTLING



United World Wrestling (UWW), the governing body for Olympic wrestling, is diversifying its digital portfolio and enhancing its data-collection capabilities with the support of N3XT Sports. Among its earliest updates, the federation rolled out a dedicated mobile app featuring an in-built livestreaming function and user login, as well as its first-ever CRM capability.

As part of its legacy, the mobile app surpassed 57,000 downloads during the 2022 UWW World Championships. With less than a year to go until Paris 2024 gets underway, with the support of N3XT Sports, the federation is rolling out UWW+, its very own premium OTT streaming offering, which will serve to maximize live and on-demand (VOD) video, further enhance its fan engagement strategy, and consolidate its user data for web and on mobile using a unique user login.

“Digital transformation is an ongoing evolution – not a destination,” says Gordon Templeman, UWW’s Director of Commercial Operations and Communications. **“Whereas, in the past, the majority of our interactions with fans were through third-party platforms, we’re establishing a digital portfolio and CRM capability which allows us to offer a personalized fan experience.”**



“Our sponsors want to build and have a D2C relationship with fans and engage with them even more and via different avenues outside their traditional event activations.”

Rita Pivoriunaite
UWW’s Marketing Manager

“To do this, we’ve had to diversify by investing in our own digital platforms. Nevertheless, while sports organizations and federations are adopting multiple data touchpoints, it’s vital that we maintain them individually so that they can serve our collective operations. Our digital transformation is progressing in a way that creates fewer data silos, allows us to work seamlessly as an organization, and to capitalize on our digital capabilities.”

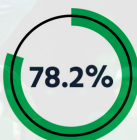
Despite its progress, the federation is taking a considered approach to scaling its digital inventory, so that the digital tools that UWW adopts enhance its ability to serve the fans and stakeholders, and do not hinder the federation’s data-collection capability. Rita Pivoriunaite, Marketing Manager at UWW, says: **“Our sponsors want to build and have a D2C relationship with fans and engage with them even more and via different avenues outside their traditional event activations. This means working with our partners to learn how to grow engagement and how to tailor content directly to our fans.”**

4 OLYMPIC MOVEMENT HAS OPPORTUNITY TO CONSOLIDATE FAN-DATA STRATEGY

It can be a hard balance to strike: to scale one's D2C portfolio and sustain strong customer relationships. Fan engagement – and customer retention – depend on a sports property's ability to identify user trends, unique interests, and to personalize the fan experience. In order to achieve this, the

implementation of a clean and robust CRM solution is key for capturing user data across multiple verticals and helps to eliminate the risk of creating data silos which disrupt operational workflow.

Breakdown of Olympic IF Data-Collection Capabilities



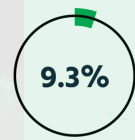
Collect Fan Data



Operate Multiple Digital Platforms



Own Multiple Data Touchpoints



Utilize an SSO Across Entire Digital Portfolio

GRAPH 4.1 - Source: N3XT Sports

What's clear from our research is the high level of data disparity throughout the Olympic Movement – no matter the IF's digital maturity. Among the most sophisticated, football's world governing body FIFA collects first-party fan data across its entire D2C portfolio, including its official mobile app, dedicated ticketing and ecommerce channels, its FIFA+Collect digital collectibles site, and the FIFAe esports series. Nevertheless, while the federation has moved to centralize its digital touchpoints, it does not yet provide access to its entire digital portfolio via a universal user login.

Without this, the federation must work harder to consolidate fan data and to track user behavior across platforms. This is a crucial trend throughout the Olympic Movement. Whereas FIFA is ahead of the curve when it comes to its own digital transformation and data-management capability, as few as 9.3 percent of Olympic IFs represented at Paris 2024 utilize a single sign-on (SSO) for their data touchpoints.

Herein lies an opportunity for Olympic sports to tailor the digital fan experience to its own data-processing goals. While beneficial to their audience reach, a diverse digital footprint is only as strong as the organization's ability to leverage unique fan data and personalized content for driving audience growth and retention. By personalizing the user journey to their individual interests, implementing a CRM built on a tailored data strategy also informs each federation – and its respective national sports bodies – on their commercial and marketing activities in regional markets and across the IF's major events.

CASE STUDY

UNION CYCLISTE INTERNATIONALE



In its *Agenda 2030*, the Union Cycliste Internationale (UCI), the global governing body for cycling, outlines its intention to develop and innovate its existing digital infrastructure to further enhance its service to everyone involved in the sport. That includes the riders and teams, the UCI's media partners and sponsors, National Federations, the UCI workforce, and – importantly – cycling fans.

As part of the UCI's ongoing digitalization, N3XT Sports is helping to develop a new, scalable information system that consolidates all of the UCI's competition, athlete, and sport data. This will ultimately help the UCI optimize its internal data-management processes and provide greater value to its stakeholders – including how it leverages cycling data from amateurs – while 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 communities, which will be able to personalize their experience with the UCI. This extends to the UCI's *My World of Cycling* fan reward platform, which invites all fans to participate in online quests and quizzes, earn points and claim rewards ranging from money-can't-buy experiences during UCI World Championships and World Cups to prizes provided by the UCI's official sponsors.



“By developing a centralized information system, we are able to ensure that every race event, result, and ranking is accounted for, while also managing our fan relationships.”

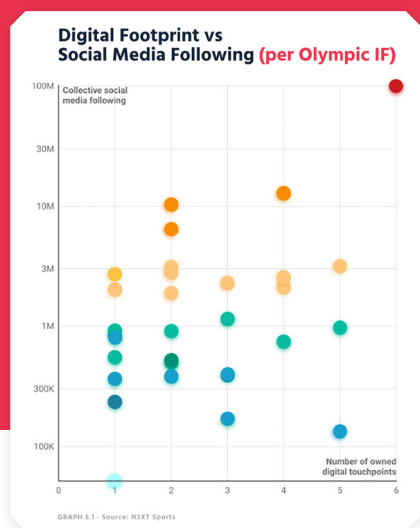
Adrien de Cheveigné
UCI's Head of Digital Transformation

“We are one of very few International Federations that combines its digital and IT departments, and this helps the UCI decide on the technologies and fan experiences we should be investing in,” he explains. “By developing a centralized information system, we are able to ensure that every race event, result, and ranking is accounted for, while also managing our relationships with fans – many of whom are cyclists themselves – within our database, so as to offer them a unique proposition.”

5 DATA QUALITY KEY TO DRIVING FAN RETENTION & SPONSORSHIP ACTIVATIONS

It is one thing to own a diverse digital portfolio that provides brand exposure and engages fans – however, it is an entirely different challenge to turn audience engagement into user retention and to grow a following that attracts new sponsors. A federation's ability to retain audiences post Paris 2024 holds, therefore, as much – if not more – importance as the organization's ability to drive up appetite for the Olympics and its other major events.

Our research shows a correlation between the digital maturity of a sports body and its ability to drive fan engagement. For example, one in eight (12.5 percent) IFs represented at Paris 2024 have a collective social media following north of 10 million. Interestingly, what connects them is not the number of social channels they are active on, nor the number of digital platforms they operate (see graph 5.1), but the fact they all collect data via multiple digital touchpoints (see graph 5.2) – whereas, by comparison, the majority of IFs with a collective social media following of below one million do not.



It's important to stress that the strength of one's social following cannot be attributed solely to the depth of their owned and operated digital portfolio. However, what it does highlight is the link between fan-data capture and a federation's ability to grow and retain audiences, as well as to connect peripheral fans, who may have engaged with the sport for the first time during the Olympics or via social media, with the federation's own digital touchpoints.

Olympic IFs With Multiple Data Touchpoints Demonstrate Higher Social Media Reach



What's also evident is that, of the IFs which have a significant social following (above one million), close to three in ten (29.4 percent) do not capitalize on their popularity by capturing fan data via a diverse digital inventory, whereas more than one in ten (11.7 percent) don't capture fan data at all. Considering the importance of digital product development for capturing first-party fan data, it is vital therefore that the federation owns a data lake that makes it easy to collect and manage all its user information in order to build stronger customer relationships.

According to N3XT Sports' findings, although almost four in five (78.2 percent) of the IFs represented at next year's Summer Olympics collect first-party fan data, only half (50 percent) of them promote partner and or/stakeholder activities with subscribers via their owned communications channels. This indicates a disparity in data maturity across the Olympic Movement – whereby the sector clearly recognizes the importance of collecting fan data, but has yet to put in place a clear digital and data strategy which supports audience retention and drives its content marketing efforts.

By demonstrating a robust CRM capability, federations are able to leverage fan intelligence to drive sponsorship and rights-partner activations. With the correct guidance, the Olympic Movement is primed for commercial growth through digital transformation and will, in turn, learn to leverage fan intelligence to launch premium digital products and diversify their sponsorship portfolio.

CASE STUDY

WORLD TRIATHLON



World Triathlon, the governing body for the multi-sport disciplines of triathlon, duathlon, and aquathlon, is undergoing a digital transformation that will see the federation optimize its data management processes. Supported by N3XT Sports, the project will serve the federation on several fronts, including how World Triathlon leverages its diverse digital portfolio, as well as fan and athlete data, to increase awareness for its major events, its sponsors, and stakeholders.

Fergus Murray, World Triathlon's Head of IT and Broadcast, says that their **"sponsors want to engage further with fans"** and via different avenues outside their traditional event activations. This means **"working with our partners to learn how to grow engagement"**, Murray adds – starting with the federation's ability to tailor content to its fans.



"Digital transformation means bringing everything together in a way that improves what we do as an organization, as well as the strength of our events, our sport, and our partnerships."

"For us, digital transformation means bringing everything together in a way that improves what we do as an organization, as well as the strength of our events, our sport, and our partnerships," Murray continues. "Part of that journey is to collate data from our different digital touchpoints, so as to better understand the fans, our athletes, and stakeholders, and how we can serve them. As part of that process, it's also about how we can add extra value to our sponsors so that, when we engage our fans, we are able to bring them along the user journey, too, based on the fan's interests."

Fergus Murray

World Triathlon's Head of IT and Broadcast

Olalla Cernuda, Communications Director at World Triathlon, says: "Understanding how fans are consuming content, specifically sports content and what type of content they consume has become a priority for us. Thanks to the ongoing digital transformation efforts we are undertaking we are able to implement new tools and more efficient workflows in our day-to-day operations."

"This has helped us optimize our content production and distribution process, which allows us to deliver and communicate with our fans in a more personalized way, and engage with the widest possible audience for triathlon – from fans to ecosystem partners."



ITALIA
RIZZA M.

6 WHAT'S N3XT?



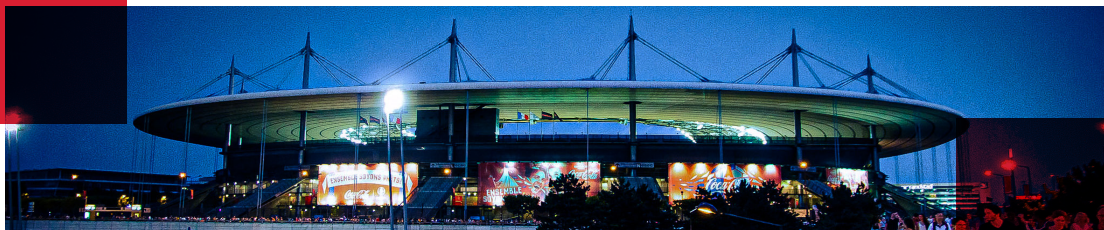
MOTASEM EL BAWAB

CHIEF INFORMATION OFFICER
N3XT SPORTS

Motasem El Bawab

The success of the Olympic Movement's digital revolution will depend on its ability to leverage first-party fan data. Our findings throughout this report demonstrate the need for sports organizations and federations to capture fan data via multiple digital touchpoints if they are going to be able to grow and retain a loyal fanbase.

The challenge therefore isn't how an entity goes about deepening its digital footprint as quickly as possible. Sports bodies are not guaranteed success simply by adopting the latest D2C tools and diversifying their product offering overnight. Digital platforms require nurturing, too – and a sturdy digital framework designed to ingest and manage a mix of valuable data points.



By understanding how the IF's existing digital infrastructure serves its data-collection capability, only then can it make adjustments to its internal processes so as to maximize its fan engagement strategy. Our research also shows that, while the majority of Olympic IFs collect first-party fan data in some shape or form, as few as half do so via more than one touchpoint, while – of those that own multiple data touchpoints – the vast majority do not adopt an SSO.

This conjures an interesting notion: albeit two-thirds of Olympic IFs own and operate multiple digital touchpoints, of those that collect data across multiple verticals, most are having to work harder and use up precious time and resources to consolidate siloed user data. Meanwhile, the other half of the field either collects only a single stream of data or nothing at all, which indicates a wild disparity in the levels of digital and data maturity at an Olympic-federation level.

The challenge is how federations and sports organizations are able to scale their digital portfolios and widen their fan engagement without creating data silos that slow down their operations and make it harder for executives to follow the user journey. This is a conundrum that the entire sports industry and not only the Olympic Movement faces today.

Nevertheless, while the Summer Olympics engages billions of people every four years, it goes without saying that this is only worthwhile if the governing bodies and their represented sports can sustain the momentum generated by the Olympic Games by driving increased viewership and participation between events.

Data transformation is an important part of this evolution and doesn't have to be costly or time consuming. On the contrary, the sports industry is constantly finding new ways to maximize the return on its technology investments and is only going to increase as, for example, artificial intelligence-based (AI) solutions such as OpenAI make it easier for executives to assess complex fan data, while also helping to simplify their existing data sets.

There is no limit to what can be achieved given the correct guidance. As Paris 2024 embarks on a truly digital Olympic Games, it is our responsibility to ensure that the Olympic Movement adopts the relevant tools and resources today to be able to capitalize on their exposure post-event; putting data capture and user analytics at the forefront of every Olympic IFs' digital transformation journey.

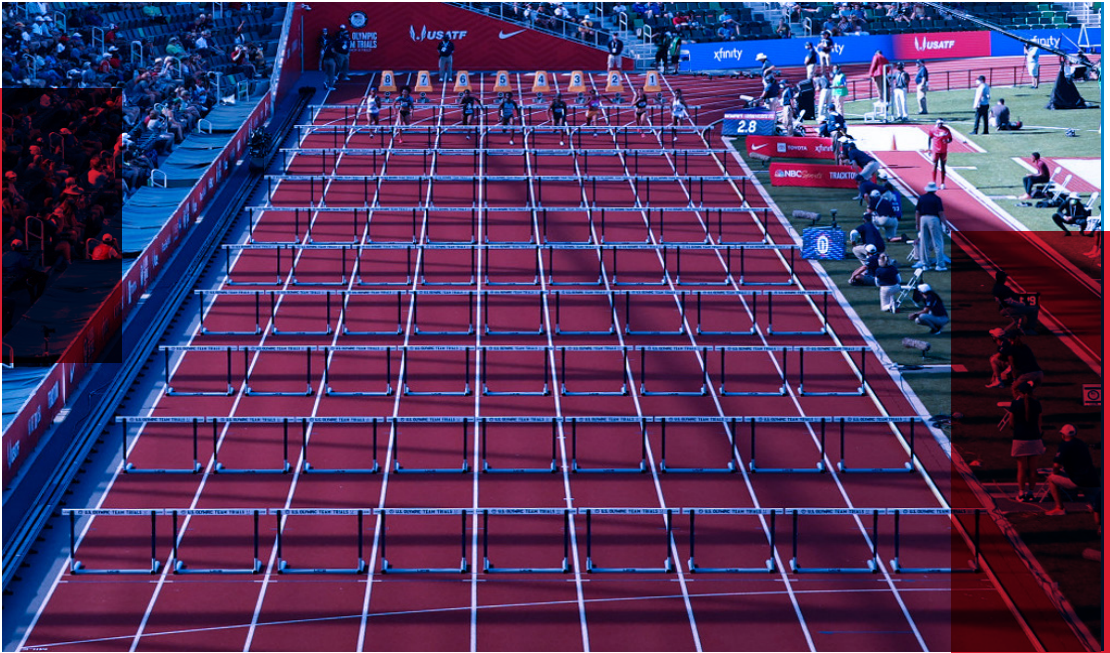
7 ABOUT N3XT SPORTS

N3XT Sports is an end-to-end consulting agency in the sports industry, bringing world-class expertise and experience to our clients through strategic management consulting and implementation support. We specialize in the modernization and transformation of organizations across the Olympic and professional sports sectors.

We work with our clients and partners to identify and address their most critical challenges, allowing them to achieve a sustainable competitive advantage within the rapidly changing sports landscape. Our clients include leading Olympic, football and basketball organizations, international sports governing bodies, investors, tech companies and government entities.

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 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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