

N3XT SPORTS

APRIL 2025



**2025 DIGITAL
TRENDS IN THE
SPORTS INDUSTRY**



EXECUTIVE SUMMARY

EMBRACING THE DIGITAL FUTURE IN SPORTS

MOUNIR ZOK
Chief Executive
N3XT Sports



As we navigate the evolving landscape of sports, our industry reports frequently highlight the dawn of a new era, where digital-first strategies are no longer optional but essential for success. The rise of streaming content and digital-product ownership has fragmented audiences, prompting sports organizations to enhance their “fan funnel” with more digital experiences. However, many still grapple with maximizing the return on investment (ROI) from their digital platforms, while only a few top-tier organizations are fully leveraging their growing digital inventories.

While expanding digital touchpoints is a step in the right direction, building a loyal subscriber base and unlocking new commercial revenue streams requires a more nuanced approach. A flexible and well-oiled data-management system is crucial for understanding fan preferences, identifying key engagement points, and optimizing customer relations and internal decision-making processes. This level of efficiency demands a robust digital strategy that integrates technologies connecting customer experience (CX), business unit interactions, and operational efficiency.

Despite the urgency to digitalize, a significant gap remains between the digital and data capabilities of sports organizations worldwide. Our research reveals that, while most properties have fan-facing web and mobile products, fewer than 50 percent collect first-party data via a web login, and only 32.4 percent use a single sign-on (SSO), highlighting the disparity in digital maturity.

This report delves into the role of digital-product ownership, integrating direct-to-consumer (D2C) experiences, and leveraging artificial intelligence (AI) and machine learning for operational efficiencies. It also explores the shift in hiring trends, with organizations investing in dedicated technology managers, data engineers, and AI specialists to drive innovation and business performance. Additionally, we examine opportunities to enhance commercial strategies through digital transformation, including consumer marketing and social listening to convert customers into loyal customers. Expert insights from contributors further enrich our understanding of this pivotal moment in sports’ digital revolution.

Mounir Zok

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1. GREATER VALUE ON DATA TRACKING & DIGITAL-PRODUCT INTEGRATION

Digital-product ownership is a key component within a sports organization's fan-engagement strategy and for driving business growth. Meanwhile, those capable of delivering greater customer conversions will be the properties whose digital portfolio supports a clear data-collection strategy throughout their organization. Fan intelligence is transforming the rights holder's ability to personalize and localize the fan experience, thus in-

creasing customer loyalty and its overall value per fan. However, while the collection of first-party fan data is also evolving – from a complementary customer-management metric into a bona fide tool for enhancing digital fan ecosystems – it is not yet an industry staple.

According to N3XT Sports research, although every one of the hundreds of assessed professional clubs, leagues, and In-

ternational Federations (IF) own a website (100 percent), fewer than half (48.9 percent) incorporate data collection via a web login within their digital strategy, restricting their ability to collect and consolidate first-party fan data among their digital products. By comparison, 61.8 percent of organizations own a dedicated mobile app, whereas 55.1 percent include an over-the-top (OTT) streaming capability within their portfolio.



Left: Newcastle players take a selfie in front of their fans.
Above: Young woman holding a phone.

AI is transforming how sport properties personalize the fan experience by optimizing data-driven decision-making. Albeit no organization's digital portfolio is exactly the same, understanding the speed of digital-product adoption will be key for strategy planning inside sports organizations. AI and machine learning tools are finding ways for sports organizations to leverage their data better, bringing efficiency to both the fan experience and internal communications. This includes the increasing investment in Large Language Model (LLM) solutions, which is expected to grow to US\$82.1 billion globally by 2033, up from US\$4.5 billion in 2023¹.

Furthermore, as the industry seeks to diversify its digital-product range and strengthen the overall fan funnel, properties will also seek to augment their workforce to include dedicated product owners to manage new solutions. This extends to data-focused personnel to ingest and analyze increased levels of user information generated within a diverse digital portfolio and integrating interactive AI tools for carrying out customer engagements and delivering hyper-personalization to the digital fan.

¹ Market.us Scoop | Large Language Model (LLM) Market Soar to USD 82.1 Bn buy 2033

THE STATE OF PLAY | DIGITAL PRODUCT OWNERSHIP COMMANDS DATA EXPERTISE

Digital-product owners sit at the intersection of a company’s digital and commercial strategies², playing the important role of developing and delivering a digital portfolio and technology stack that serves customer (CX) and employee experiences (EX). These span, though are not limited to, the breadth of a rights holder’s D2C capabilities, including its ecommerce platform, ticketing, mobile, OTT-streaming, and fantasy-gaming products.

As sports properties diversify their D2C functions, the front office will continue to evolve to the changing fan demands and decipher behavioral trends within the fan database. Although sports organizations and rights holders are investing heavily in their digital attributes, and tailoring them to first-party data ownership, very few are maximizing their fan-data collection. For example, while 88.6 percent of properties collect first-party fan data via a website, according to N3XT Sports research, as few as 54.4 percent collect fan data via a mobile app, 65.1 percent via ecommerce, and 69.9 percent via ticketing.

Meanwhile, OTT-streaming (38.2 percent) and fantasy-gaming (19.1 percent) products are vastly underutilized for fan-data collection, whereas only 32.4 percent of the organizations assessed collect fan data via a single sign-on (SSO). This indicates a high level of siloed data across the professional and Olympic sports ecosystems, as well as opportunities for rights holders to augment their respective fan funnels and invest in their digital and data personnel to better understand the fan journey.

“As rights holders diversify their digital portfolios, more and more are investing in dedicated platform managers and business-data analysts to maximize their ROI.”

HISHAM SHEHABI, OLY
Chief Operating Officer
N3XT Sports



NEXT STEPS | PROFESSIONAL SPORTS PROPERTIES ARE DIVERSIFYING THEIR WORKFORCE

Technology integration and innovation have traditionally fallen on the shoulders of a Chief Technology Officer (CTO) or Chief Information Officer (CIO) throughout an organization’s digital transformation. As sports organizations seize greater digital-product and data ownership, more are augmenting their workforce to include dedicated product owners and bona fide data scientists.

According to N3XT Sports research conducted in Q1 2025, the vast majority of professional clubs and franchises in Europe’s and North America’s most popular leagues employ one or more **digital/technology** leads, as well as a dedicated **data scientist or data engineer** (see table 1.1). Nevertheless, as the industry evolves, and more properties

adopt innovative tools and AI solutions to enhance the UX, there are still very few sports clubs and franchises which employ dedicated **innovation leads**, whereas even fewer are hiring specialists in **AI and machine learning** positions, despite the industry investing US\$7.6 billion in AI and machine learning technology in 2025³.

Among the industry’s benchmarks, the National Basketball Association (NBA) is home to the highest percentage of franchises with in-house innovation leads (63.3 percent) and AI/machine learning specialists (16.7 percent) and are more likely to hire digital and data leads compared to their European and Olympic counterparts. Just as organizations have diversified their workforce to include digital

and data leads, more properties will see value in hiring dedicated innovation and AI specialists as the sector continues to embrace automation to improve their customer relationship management (CRM), data management, and operational efficiencies.

By comparison, the Olympic Movement’s summer International Federations (IF) are at earlier stages of their own organizational restructuring, with 62.9 percent of Summer Olympic IFs employing a dedicated digital/technology lead and 31.4 percent employing a lead data scientist or engineer. Meanwhile, only 5.7 percent hire an innovation lead, according to research conducted via *LinkedIn Sales Navigator*. Summer Olympic IFs have yet to hire an AI/machine learning specialist.

PERCENTAGE OF SPORTS CLUBS/FRANCHISES WITH DEDICATED ROLES (PER LEAGUE)

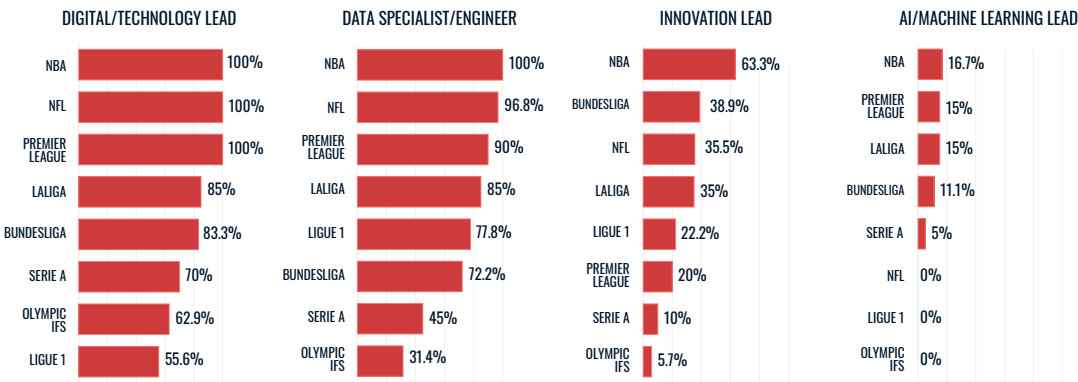


Table 1.1. Source: LinkedIn Sales Navigator

² Teal | What is a digital product owner?

³ Modor Intelligence | AI in sports market size & share analysis - growth trends & forecasts (2025-2030)

2. FAN HUBS & AI CREATING MORE INTERACTIVE FAN EXPERIENCES

Whereas historically the marketing efforts of major sports teams and competitions sat exclusively within advertising sales, their fan-communications strategies have evolved dramatically since the dawn of D2C technology. Social media and email marketing have allowed sports bodies to communicate brand activations directly with their fans, laying the foundations for commercial marketers inside the front office to segment their campaigns based on the fan's personal interests and integrate sponsored content (tailored to user behaviors) into their digital strategy.

Nowadays, sports properties are building their own platforms to enhance their dialogue with the fan – going as far as to allow the fans themselves to communicate their interests with the brand directly and is helping them to tailor the UX. By way of example, speaking with N3XT Sports in December, Movistar Team Cycling's Chief Marketing Officer (CMO) Juan Pablo Molinero outlined the Spanish professional cycling team's transition from "monologue-focused" to "dialogue-based" communications, built around its own digital fan club.

"The *Movistar Team Cycling Club* is helping us to move a traditional business model into a slightly different hybrid B2B-B2C model," Juan Pablo explains. "We have millions of fans and supporters all over the world, but – until now – we did not have a real tool to generate conversation, dialogue, and activities with organizations. Today, it's about how we can converse with our fans, our partners, and the media based all around the world. The most relevant move has been to change this monologue into a real dialogue."

"The Movistar Team Cycling Club is helping us to move a traditional business model into a slightly different hybrid B2B-B2C model."

JUAN PABLO MOLINERO
Chief Marketing Officer
Movistar Team Cycling



THE STATE OF PLAY | PERSONALIZED & LOCALIZED CONTENT DRIVING AUDIENCE ENGAGEMENT

Data governance is the cornerstone of AI integration at the enterprise level. Without a structured approach to managing, securing, and standardizing data, any AI application – whether it's predictive analytics, automation, or personalization – will be built on unreliable foundations. The principle of “garbage in, garbage out” is particularly relevant here; poor data quality leads to flawed AI outputs, undermining decision-making and operational efficiency.

- **Predicting future fan behaviors and interests** to evolve D2C fan experiences based on their current fan data, including enhancements to the in-stadia experience.
- **Optimizing their sponsorship and commercial assets** alongside real-time consumer trends, helping connect brand partners with fans and making the rights holder more appealing to investors.

Investing in data governance is therefore not just a technical necessity – it's a strategic imperative for unlocking AI's true potential in sports. This can be achieved in several different ways, including:

- **Developing targeted marketing campaigns based on user demographics**, so as to drive higher audience acquisition and retention based on common user interests.
- **Personalizing their digital content and offerings** in ways that puts the fan at the heart of the brand and its communications.

For sports organizations looking to integrate AI layers and applications into their CRMs, competition management platforms, or fan engagement tools, strong data governance ensures consistency, accuracy, and compliance with evolving regulations. If organizations wish to leverage AI agents – autonomous systems that analyze data, automate processes, and make decisions – a well-governed data ecosystem is non-negotiable. Agents rely on clean, structured, and well-labeled data to function effectively. Without this, they cannot deliver meaningful insights or automate workflows in a reliable manner.

AI-POWERED SOLUTIONS DELIVERING FAN VALUE

Whereas sports properties are investing in their digital products and data-collection capabilities to drive audience acquisition and retention, our research indicates that sports properties could be using their data more effectively to generate revenues and attract commercial partners in international markets using personalized and localized content. **For example, N3XT Sports is supporting the implementation of AI-powered fan engagement platforms to help its clients increase awareness across their fan ecosystem and bring younger audiences to their subscriber base.**

NEXT STEPS | DIGITAL TRANSFORMATION PIVOTAL IN DRIVING COMMERCIAL SUCCESS

Diversifying a sports organization's digital-product portfolio helps introduce new audiences into its fan funnel and provides unique monetizable touchpoints for engaging users with a commercially driven UX. Digital transformation – including the integration of D2C products connected via a centralized CRM solution – is a vital pillar for generat-

ing fan value. N3XT Sports research indicates that sports properties with higher digital and data maturity levels glean stronger commercial growth.

By way of example, using our unique research methodology (see page 21), on average, European club football's highest commercial earners⁴

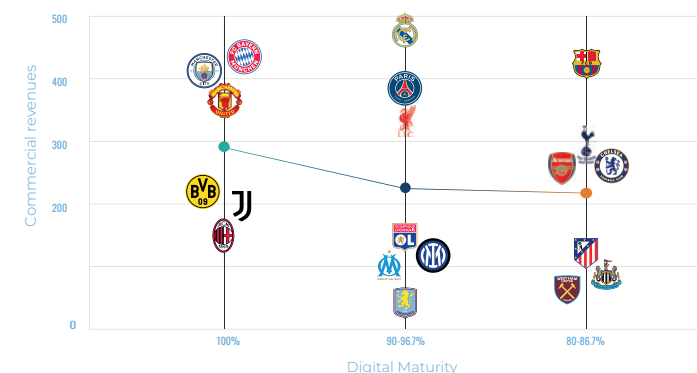
score higher for their digital and data transformations (see graphic 2.1). Meanwhile, clubs which score a perfect 100 percent for their digital and data capabilities, according to our research, generate higher average commercial revenues, whereas those with limited digital and data maturity levels generate fewer commercial revenues (see graphic 2.2).

DIGITAL MATURITY OF EUROPEAN CLUB FOOTBALL'S HIGHEST COMMERCIAL EARNERS

COMMERCIAL REVENUES 23/24	CLUBS	AVERAGE DIGITAL MATURITY	AVERAGE DAILY SOCIAL POSTS	AVERAGE SOCIAL FOLLOWING
>€350m	     	95.6%	39.5m	250.3m
€150-350m	      	92.4%	39.4m	114.5m
<€150m	      	89%	27.8m	31.5m

Graphic 2.1. Sources: N3XT Sports, Deloitte, RivalIQ

DIGITAL MATURITY VS COMMERCIAL REVENUES



Graphic 2.2. Sources: N3XT Sports, Deloitte

Although this is not indicative of every organization's commercial performance, nor the strength of their respective digital strategies, it does broadly highlight the value of owning a diverse, data-enabled D2C ecosystem among European football's most commercially viable clubs. The research also demonstrates the importance of holding a strong digital presence across the entire fan funnel. For example, European football clubs which earn above €350 million commercial revenues annually also demonstrate, on average, a far higher social media following (250.3 million) and provide a higher frequency of posts across their social media channels (39.5 per day).



Alex Mitchell - England vs Italy (Guinness Six Nations 2025)

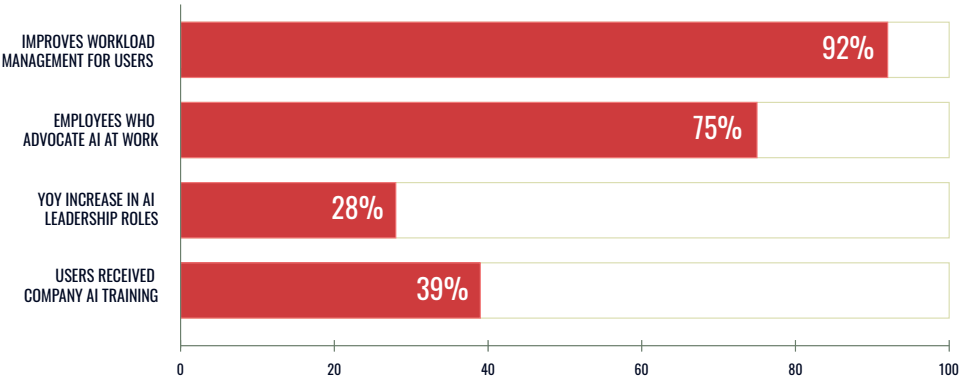
3. CHANGE MANAGEMENT & DIGITAL UPSKILLING WILL MAXIMIZE ROI

Leadership roles within sport’s digital transformation are no longer confined to CTOs and CIOs. The success of implementing a clearly defined data and digital transformation strategy requires a collective effort inside sports organizations and equipping personnel with the tools and know-how for operating the latest CRM and software solutions.

At N3XT Sports, our team guides our clients’ entire workforce along their digital transformation journey, including regular workshops and seminars to ensure that the technologies embedded within the client’s ecosystem are operated efficiently and tailored to the team’s needs.

In 2025, this will include the integration of AI and machine learning tools within their decision-making processes. As sports organizations lean more heavily on fan and user data to inform their digital strategy, advances in AI-driven automation will enable personnel to drive efficiencies in the management of high quantities of data, unlock personalization features to enhance the fan experience, and allow employees to focus on high-value strategic initiatives by reducing repetitive tasks. This is, in turn, supporting consumer demand for Environmental, Social, and Governance (ESG) compliance within sports properties by finding ways to reduce waste and make improvements to resource-heavy processes.

ARTIFICIAL INTELLIGENCE | KEY WORKPLACE TRENDS



Sources: Microsoft, LinkedIn | 2024 Work Trend Index Annual Report

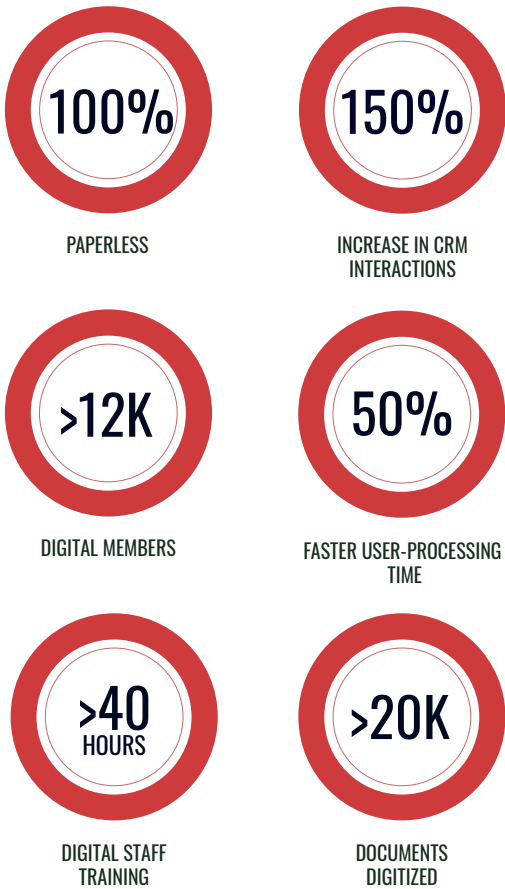
THE STATE OF PLAY | DIGITAL TRANSFORMATION CHANGING HOW SPORTS APPROACH OPERATIONS

Digital transformation is providing the foundations for hyper-personalized fan and employee experiences – while AI and machine learning solutions are helping our clients optimize their data management, how data informs the D2C customer relationship, and to drive efficiencies in employee processes. According to N3XT Sports research, organizations that integrate AI into their operations reduce operational inefficiency by at least 50 percent while also developing new value for their stakeholders. Meanwhile, sports properties are centralizing their data and digital infrastructure to improve efficiencies across their employee and stakeholder ecosystems.

For example, the Professional Footballers’ Association (PFA) has sought to enhance its organizational efficiency and effectiveness with the support of N3XT Sports by centralizing its employee resources and transforming the England and Wales footballers’ union into an entirely paperless operation⁵. As a result, the PFA has made both its employee and member experiences 100 percent digital, increasing the processing speed of member applications by 300 percent, driving a 150 percent uplift in CRM interactions, and demonstrating significant improvements in the digital literacy of its workforce.

“Whereas, historically, the PFA has been heavily reliant on old fashioned paper communications, with the limitations that involves, our collaboration with N3XT Sports has transformed the way in which our organization collects, shares and analyzes data,” explains Patrick Coyle, the PFA’s Chief Operating Officer (COO). “[This grants] our members a better user experience through the PFA Member Portal and more resources for our executives to best meet their needs.”

PROFESSIONAL FOOTBALLERS’ ASSOCIATION | KEY MILESTONES



NEXT STEPS | AI GOVERNANCE & TRAINING CRITICAL TO BUSINESS SUCCESS IN SPORTS

“In 2025, CIOs and technology leaders must prioritize AI readiness, enterprise-wide data governance, and workforce upskilling - rather than chasing moonshot AI projects without clear business cases.”

MOTASEM EL BAWAB
Chief Information Officer
N3XT Sports



As AI and machine learning (ML) continue to redefine digital transformation in the sports industry, their integration must be guided by a clear business strategy, robust governance frameworks, and structured workforce enablement. Simply adopting AI is no guarantee of ROI. Instead, organizations must first establish a foundation of data integrity, interoperability, and AI readiness before layering intelligence into their digital and technological ecosystems.

AI is not a magic bullet – it is an enablement technology that enhances decision-making by analyzing vast data sets, identifying behavioral patterns, and unlocking operational efficiencies. When deployed effectively, AI-driven insights can enhance D2C fan experiences, optimize event logistics, and drive efficiency in resource-heavy operations. However, its success depends on the ability to process high-quality, well-governed data at scale.

“Digital transformation is the foundation for subscriber growth and retention, while AI holds the potential to revolutionize audience engagement by surfacing untapped consumer insights,” explains Mota. “In 2025, CIOs and technology leaders must prioritize AI readiness, enterprise-wide data governance, and workforce upskilling—rather than chasing moonshot AI projects without clear business cases.”

⁵ N3XT Sports | Professional Footballers’ Association Digital Transformation Playbook

WHAT'S N3XT?

Sports clubs, leagues, and bodies are understandably at different stages of their own digital transformation journey. The role that digital transformation plays within an organization depends ultimately on each of their individual business objectives, who they consider to be their target audience, and the current data and digital literacy across their workforce.

N3XT Sports is providing its clients with professional guidance throughout the digital transformation journey. This spans the requirement-gathering phase to align solutions to their organization's business needs and the relevant training they require thereafter – helping to tailor solutions to their personnel workings and deliver digital autonomy across the company.

Underpinning every successful digital transformation, sports organizations must own a flexible technology stack that advocates operational efficiency and collaboration within the front office, while enabling them to seamlessly implement new D2C experiences, operational tools, and enhance their ability to leverage data so as to personalize fan experiences, align them with their sponsors and stakeholders, and improve the operational efficiency of the business

As we look to the future, in 2025, sports clubs, leagues, and federations will be futureproofing their operations in numerous ways. They are doing this by: (1) diversifying their digital portfolios to augment their data-integration touchpoints and data-processing infrastructure; (2) optimizing their data-management and decision-making processes with the use of AI; (3) upskilling departmental teams to become experts across the present technologies and trends; and (4) hiring digital, data, AI, and innovation-specific personnel that specialize within these criteria.

While 2023 saw a surge in generative-AI exploration, 2024 marked a shift towards responsible AI programs and proof-of-concept (PoC) implementations. As sports properties integrate automated processes, AI adoption can lead to greater technological fragmentation and therefore reduced ROI without first establishing a defined digital roadmap. Just as organizations are assessing the types of fan experiences that deliver commercial growth, it is therefore important that organizations first understand how the latest technologies such as AI can improve the way their operations are run and its role in better understanding the fans and the unique experiences that bring them back into your ecosystem time and time again.

Project management is an essential piece within sport's digital transformation; from the strategic personalization and implementation of technology solutions inside organizations to training its workforce and personnel. Our expert project managers serve every employee within N3XT Sports' client base, helping them to manage their portfolio of digital transformation initiatives at every milestone.

Lara Ammar

LARA AMMAR
VP of Project Excellence
N3XT Sports





Lando Norris - Australian Grand Prix

RESEARCH METHODOLOGY

Digital products: This focuses on the breadth of each organization’s digital inventory, including whether it owns: a website (1pt); ecommerce platform (1pt); ticketing platform (1pt); mobile app (2pts); fantasy/gaming product (2pts); and/or OTT/streaming platform (3pts).

Data collection: This focuses on whether the organization collects first-party fan data via a: website (1pt); ecommerce platform (1pt); ticketing platform (1pt); mobile app (1pts); fantasy/gaming product (1pts); an OTT/streaming platform (2pts); and a single sign-on (SSO) which enables users to access every data touchpoint using the same login (3pts).

Social presence: This scores each organization on its collective social media following/subscriptions across its official Facebook, Instagram, TikTok, X, and YouTube channels, including: 1pt per active social media account; and whether it has a collective social following of more than 10 million (5pts), between 3-10 million (4pts), between 1-3 million (3pts), between 0.5-1 million (2pts), or less than 0.5 million (1pt).

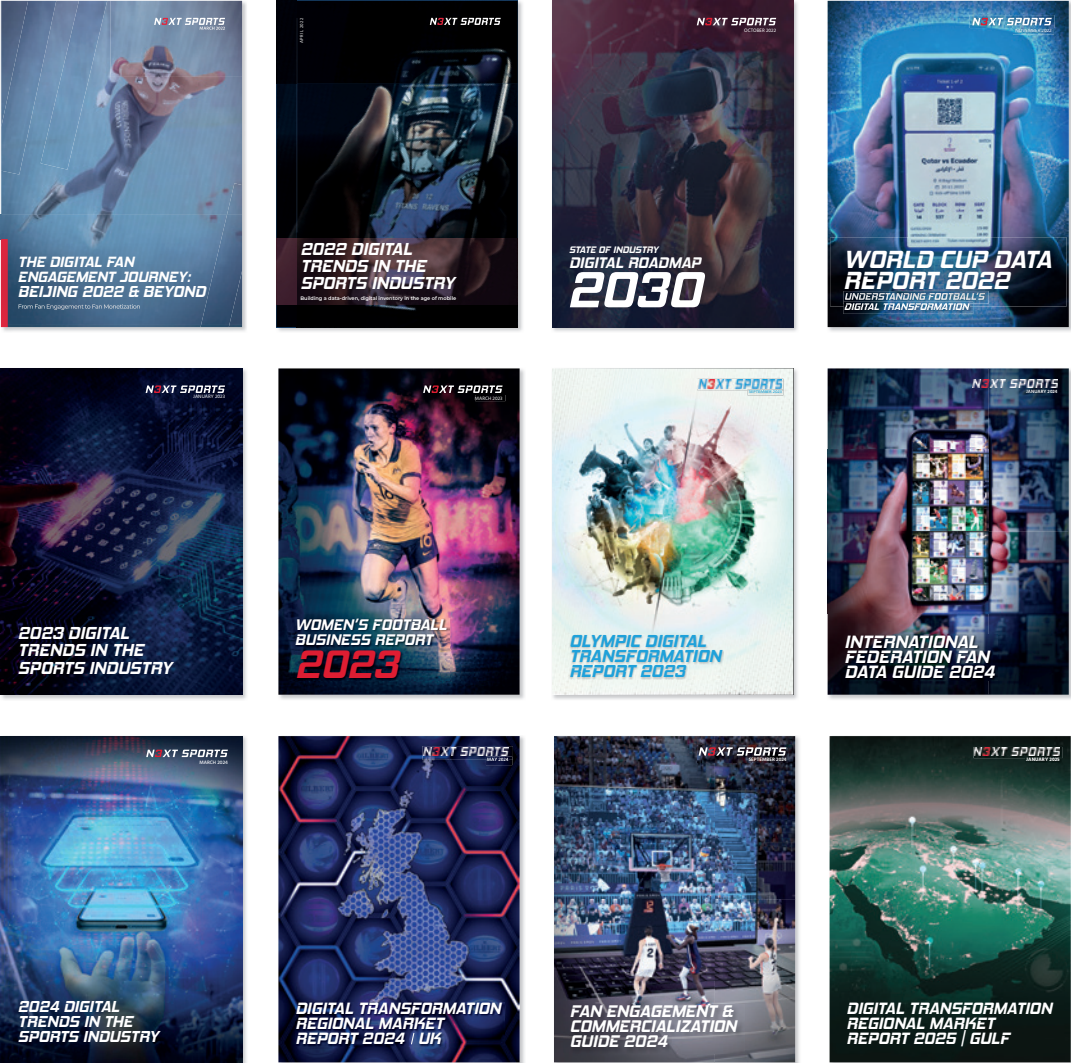
DIGITAL PRODUCTS	SCORE
WEBSITE	1 PT
MOBILE APP	2 PTS
ECOMMERCE	1 PT
TICKETING	1 PT
OTT / STREAMING	3 PTS
FANTASY / GAMING	2 PTS

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

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

Each category offers a maximum of ten available points while the organization’s overall score represents an average of its three category scores. Final scores will be converted into a percentage. Research for this report was conducted in Q1 2025.

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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 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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