

# SPORT DIGITAL TRENDS 2021



Pulley, Punch bag, Puncture, Walking, Warm up, Watchful, Weigh, Weights, Win, Wince, Winning, Wisdom, Work, Workout, Calcium, Calisthenics, Calories, Care, Cereals, Challenges, Change, Choices, Circulation, Clean, Commitment, Communication, Condition, Conditioning, Contribute, Control, Cope, Cross-train, Cuisine, Culinary, Cure, Endurance, Energy, Exalt, Exemplary

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# INTRO

During the past year the Sport Industry has been burdened, in particular physical participation suffered the most. During the next months, the Sport Industry will gradually regain the space lost because of the spread of the Covid-19 pandemic.

However, 2020 leaves behind an important legacy: it allowed us to understand that the **Sport Digital Transformation is necessary for everyone in this industry**, not just for top level clubs and athletes. This evolution will involve the Sport Industry all around the world, having an impact on TV Rights, sponsorship deals, athletes management, it has determined an arise of a team-building necessity inside Leagues and Federations. **Fans have already started their personal Digital Transformation.** They are going to reach a higher level, **becoming members of an increasingly vertical community and keeping the pace with post-pandemic technologies.**

**This trend will be strengthened by fans getting back to arenas and stadiums, with a brand new background.** The enthusiasm of a physical live experience will remain unchanged, but the tools offered by the digital transformation can enhance this experience, bringing it to the next level.



**Fabio Lalli**

Chief Business & Innovation Officer  
at IQUII & IQUII Sport



# SPORT DIGITAL EVOLUTION

## INTRO

The Sport Digital Transformation begun during the pandemic is expected to cause a real evolution of the sports product.

**An integrated reassessment of processes, infrastructure and sports brand management methods is going to be required over the next year.**

## DESCRIPTION

Figuring completely digitized Clubs, Federations, Institutions, Leagues and large events (all with a scheduled social media activity) is not enough. **The Sport Digital Evolution process will trigger radical internal changes in managing the back-end of sports organizations.**

There was a time when sport business, especially football, used to set an example for its economic dynamics. Now, instead, it is time for the Sport Industry to borrow ideas and processes from other business industries, with a **special focus on assets and internal organization.**

This is a consequence of the health emergency, which pushed the entire economy to reschedule its approach, following a significant paradigm shift of the fan/consumer.

## SO WHAT

More widespread technology, a mindset change among managers and sport professionals, enhanced training and a new role definition, so that **sport can be aligned with all the other industries, constantly increasing its value.**



# BROADCASTING & PODCASTING

## INTRO

Contents will be available through increasingly vertical OTT platforms: **clubs will be allowed to develop their own broadcasting projects including personalised video and audio contents**, generating new revenue streams and revolutionizing the current paradigm. This will mark a radical shift.

## DESCRIPTION

**The omnidirectional broadcasting will take place through new channels** that will enable a more vertical exposure, **as a consequence of a new strategy inside the TV rights market**. Clubs will increasingly keep to themselves the opportunity to deliver Over The Top contents on their own platforms. In some cases, they won't be allowed to show these contents, since external providers hold the TV Rights.

Therefore, as an alternative solution, **clubs will integrate on their own channels all the activities related to the sport brand**, creating an interactive community that will enrich the broadcaster. Podcasts, as well as radio stations, will help Google's algorithm, that will soon get access to all the voice contents and map the keywords: **the algorithm evolves and adapts to the people's needs**, radically changed and strictly related to the voice in the Sport Industry, too.

## SO WHAT

Modern platforms, able to offer exclusive contents, are going to be studied and designed following the Netflix video model. At the same time, **developing Web Radios and Podcast channels dedicated to the club's sport stories, aiming to offer quality products**: the voice is the one and only means of communicating the brand's history.



# RETAIL & MERCHANDISING

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## INTRO

Merchandising and Retail will be more digitalized, especially until a new normality comes in place. **E-commerce and its dynamics will have more and more impact on Marketing Technology campaigns** focused on meeting the fans' new needs.

## DESCRIPTION

Clubs will turn into companies with e-commerce systems taking advantage of all the chances offered by the platform. This will allow them to fill the negative revenue gap caused by missing incomes from physical merchandising points. **We are going to see temporary shops and dedicated strategies based on associated memberships**, as it happens with the big retail players from the other industries.

The paradigm shift is not about platform, but mindset, strategies and creativity that clubs can borrow from the Retail industry, as well as from other brands' UX. They are going to benefit from these different approaches that might push their Merchandising products. **More and more often, clubs are going to open their stores on platforms like Amazon, as many European big clubs already did.** Amazon will try to centralize both the content and the merchandising distribution.

## SO WHAT

The stakeholders must be ready to invest not only in proprietary platforms that include an e-commerce system available to the fan, but also to understand the dynamics of marketplaces such as Amazon. **The latter are now part of the fans' purchasing behaviors**, especially over the last year: understanding the latest technological features to use and building new touchpoints to reach out to the fans.



# THE TECH LEAGUE

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## INTRO

Leagues will have to make creative efforts in order to get the TV Rights back from the traditional broadcasters and to build environments more and more focused on the Fan Engagement of the single clubs. The spotlight moves from the Club to the Leagues: **the Digital Transformation process will involve sports, Federations and Leagues, as it happens with La Liga and La Liga Xtra.**

## DESCRIPTION

After a huge crisis in the Sport Industry, significant economic losses and some troubles with the TV Rights deals, Leagues should shape **significant economic losses and having some troubles with the TV Rights deals**, Leagues should shape new strategies in order to renegotiate TV Rights and imagine new ways to deliver contents covered by copyright.

Clubs might pave the way, serving as an example for Leagues on how to adopt a different approach for being sustainable. **The above mentioned transformation will involve all the sports, not just football, and its effects will influence large events, too.** This will allow the Leagues to regain their bargaining power on TV rights, which will be more and more fragmented and generate increasing in-house revenues.

## SO WHAT

**Dedicated platforms will become a reality, shaping a union of all the Leagues' clubs.** Macro Media Houses are going to be part of the Sport Industry: through this touchpoint, Leagues will deliver new contents and involve all their fans. This might be seen as an emulation of the NBA model.



# DIGITAL ATHLETES

## INTRO

In case of team sports, **athletes with a stronger digital presence will become the real engines of their clubs**; if representing a whole and different sport discipline, they can act as influencers. Even more athletes will be supported by professionals to make the most of the new digital reality of sports, strengthening their partnerships through digital strategic infrastructures.

## DESCRIPTION

Most athletes don't take care enough of their digital image, due to the lack of willingness to spend time and energy improving their digital presence on social media: the athlete is mainly focused on the pitch, in the preparation of the games and on results. The pandemic has reinforced the awareness that the gap between the athlete and the fan, through digital, is getting tighter now; so, during 2021 (the year of some big and global sports events) **the athlete will be involved in a new digitalization process.**

Not everyone will be able to face this alone, and athletes must acknowledge that the future of their partnerships and their career after being sport performers will depend on their transformation into "digital athletes".

## SO WHAT

Athletes' preparation - as well as the one of the professionals supporting them - will be the core activity in this Olympic year. **Companies are going to choose their testimonials not only based on their online follower base, but also on the frequency and quality of their publications.**



# MEMBER NOT FAN

## INTRO

**The future of the fan experience has a name: membership and loyalty.** Fans won't be left alone anymore on social media, but encouraged to join digital and technological mobile systems designed to build - together with the commercial partners - vertical paths based on loyalty and internal engagement programmes for the community.

## DESCRIPTION

The era in which clubs focus their digital strategy on social media engagement is now over. **Clubs and athletes finally understood that fan engagement on social media does not give their digital effort the proper attention back.**

In the past, membership and loyalty schemes used to spread especially in the world of services and, in a close future, they will be adopted by the entire sports world to create even more vertical and passion-centered communities. **Fans will become "members" of a community with loyalty programmes tailored to them.**

## SO WHAT

**Fans will start new paths leading them to gain points to access benefits and services** associated with the sport brand.

This transformation will benefit partnerships as well, enabling new models to be activated within the membership schemes.



# iENGAGEMENT

## INTRO

**Integration Engagement is about to start!** The new Fan Engagement process will be based on the integration of Physical and Digital. The remote experience is going to be important, but once fans will be back to the stadiums and to the arenas, **they will have a brand new background that will activate new physical Engagement needs.**

## DESCRIPTION

Despite the social distancing, fans got in touch with sports brands, even though they had no access to the stadiums. Meanwhile, clubs have studied alternative ways to engage their sponsors. Hence, **the digital solutions developed during the pandemic are going to be integrated in a new Fan Engagement process.**

The above mentioned solutions will take social distancing into account, enabling an integration of Engagement processes with new digital models. **Such digital and physical activities will not be split anymore.**

## SO WHAT

**New vertical platforms are already in development.** On these platforms, clubs are going to activate Engagement programs dealing with the city where the event takes place.

**The purpose is to catch the fans' eye before, during and after the game.**



# SPORT BIZ DATA

## INTRO

New data will be the “fuel” enabling the Sport Business to restart and gain new energy after the crisis. **The Sport Industry will enjoy the benefits of the new Business Intelligence** applied to sports, such as integrated CRM systems and data analytics.

## DESCRIPTION

Fans are looking for more data dealing with on-field performances. For instance, **AI and social media metrics will provide more details about on-field performances and refined engagement.** This will help the clubs to engage the sponsors, which will obtain more spaces and shape new conversion opportunities.

The integration of features, such as tracking players’ average location on the pitch through AI and monitoring time-framed conversations, will allow to point out the strong relationship between fans and athletes. Moreover, these dynamics will pave the way for new Engagement paths. **All this data is going to act as fuel for a global overhaul within the Sport Business**, involving partners that are seeking new paths to assess their investments in sport events.

## SO WHAT

Creating, filtering and analysing data will allow the Sport Industry to align with the economic world. Data is going to have a crucial role, so it will be essential to be equipped with advanced data gathering and analysis systems.

**Data processing will allow to find the best solutions in terms of effort and revenue, performing constant monitoring.**



# WHAT WE DO

IQUII Sport is the IQUII's Business Unit focused on sports, born in August 2017. **We daily assist clubs, associations and players** to make the most of their online presence, **providing them with the best solutions to win the match also off the pitch** to assure the fanbase a 24/7 memorable experience.



## INSIGHT

**We analyze** the Sport Industry with a data-driven approach, to produce insightful reports.



## STRATEGY

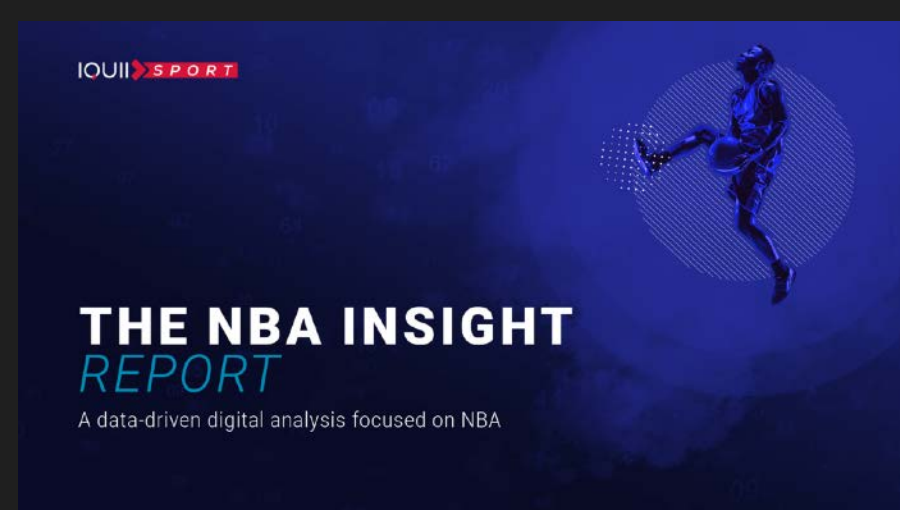
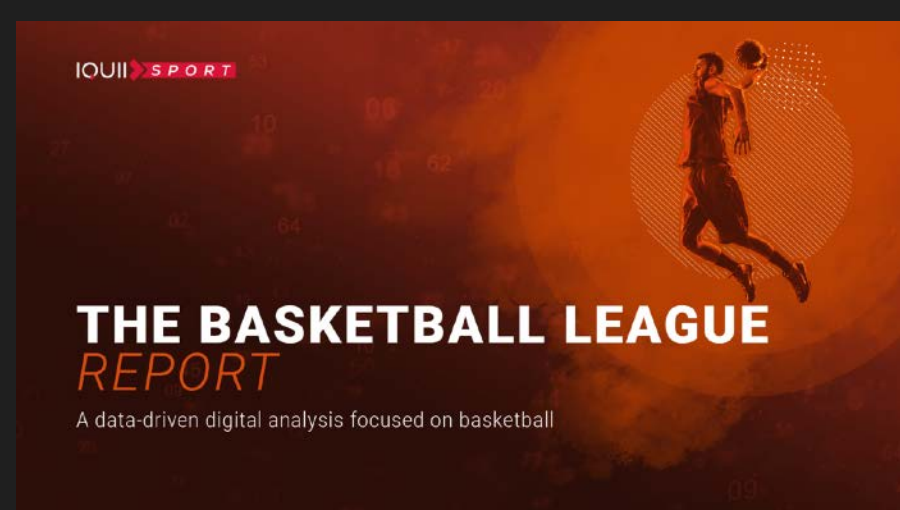
**We study** the market anticipating its trends, to design the best strategy tailored to your needs.



## TECHNOLOGY

**We develop** web and mobile Sport Platforms able to revolutionize the whole Fan Experience.

# OUR STUDIES





# WHO WE ARE

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# CONTACTS

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Our Brand Magazine (Italian only, at the moment): [sportthinking.it](http://sportthinking.it)

For any kind of information, please drop us an email at [sport@iquii.com](mailto:sport@iquii.com)





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