

Data Strategy Consulting

Together,
we're helping monetise 1st
party data in sport.



Sport properties seek to rapidly embrace digital, data and AI, though value realisation is at risk due to data immaturity



Business leaders need a greater understanding of the value realisation impact of an effective data strategy, that powers informed decisions on investment and risk priorities in their sports ecosystem.

Cloud, Data and AI impact all areas of the sports ecosystem

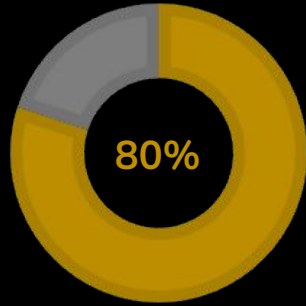
Competitive pressure is rapidly increasing for sports properties in all sporting codes



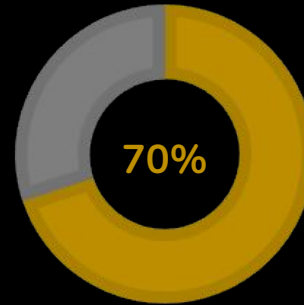
- ★ New digital revenue streams
- ★ **Hyper-personalised digital fan engagements**
- ★ Real-time, immersive streaming experiences
- ★ **Connected, digitally interactive smart venues**
- ★ Sport is now a digital, personalised entertainment business
- ★ Gen Z and Alpha sports fans expect instant, 'sound-bite' sporting experiences.

Smart Stadiums & Personalized Sports Broadcasting Intensifies

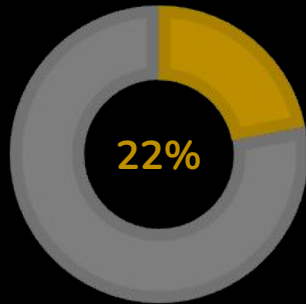
Powered by 5G private networks and secure 1st party data



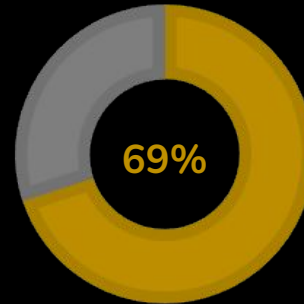
of Gen Z & Millennials want to watch replays or live games from different camera angles on their mobile device **whilst at live stadium sporting events** [2]



of sports executives view diversifying content offerings beyond live events, enhancing live media experiences, and customising content as **crucial strategies to boost deeper fan engagement** [3]



global growth forecast for **digitally connected sports venues** (CAGR '22-'27) [4]



of security leaders expect AI to significantly enhance data security **37% rating AI as a total game changer** [5]

[2] In-stadium experience | Deloitte Insights

[3] 2023 Global Sports Survey | Altman Solon

[4] Latest | Global Smart Stadium Market Size/Share Worth USD

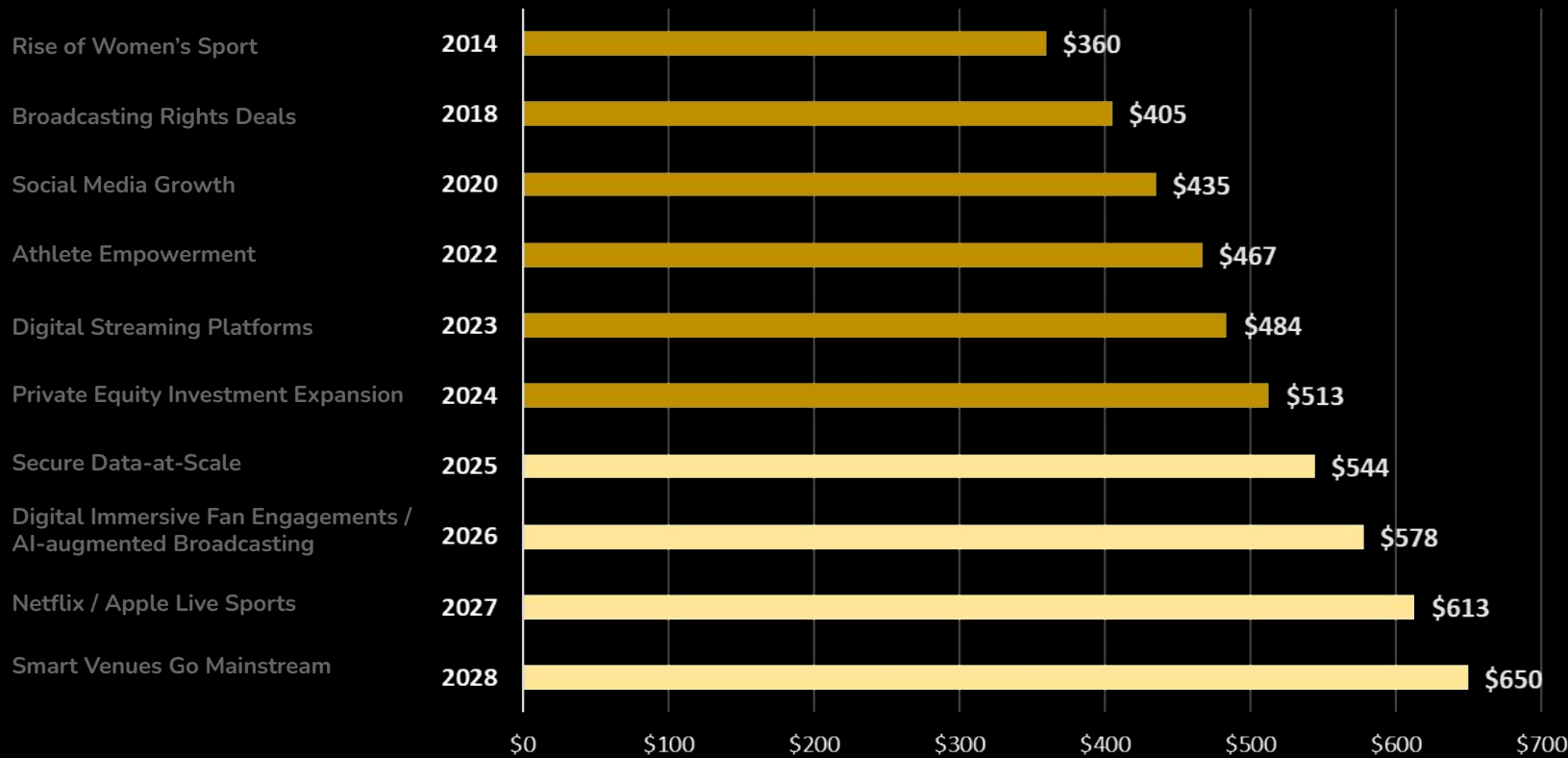
[5] Opportunity with every insight (kpmg.com)

Global Sports Market Size 2014 - 2028

With a forecast CAGR 6.1% 2024 - 2028, data is the lifeblood to power profitable growth

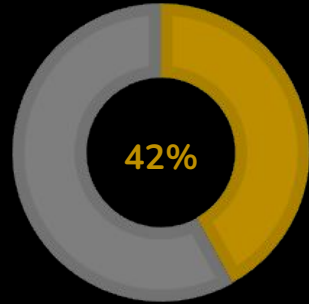
Disrupting Influence

Market Size \$ billions

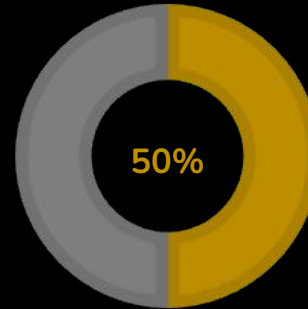


Pivoting to become a data-driven sports organisation is challenging

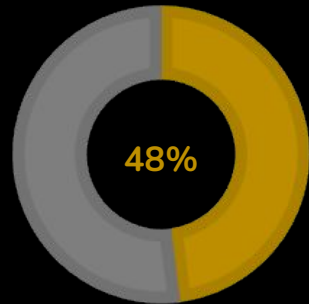
Data governance, data operating models and effective data-at-scale for Gen AI projects is complex and multi-faceted



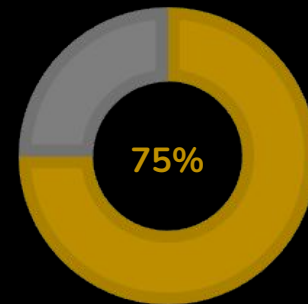
% of organisations need help developing policies, governance and guard rails **for data, AI and cybersecurity to ensure regulatory compliance** [2]



% of organisations that have **access to and leverage synthetic data for their AI algorithms** [2]



of CxOs admit their enterprises **lack enough high-quality data to operationalize their generative AI initiatives** [2]



% of executives said that "good quality data" **is the most valuable ingredient to enhance their generative AI capabilities** [2]

Monetisation growth is not yet realised in Europe

Europe is at an inflexion point where media rights ceases to be the primary revenue growth driver



- ★ Only 2% of sports rights holders expect media rights to deliver significant revenue growth in the near term in UK ^[1]
- ★ Data-driven digital offerings and ecosystem partnerships emerge as potential new levers for growth
- ★ **88% of UK sports organisations do not have a data strategy integrated into their business decision making ^[1]**
- ★ Value creation remains elusive due to lack of data, AI and cybersecurity expertise
- ★ **50% of UK sports properties commercialise less than 10% of their known audience ^[1]**
- ★ Sports properties and media broadcasters need to become data centric organisations to compete in an increasingly crowded global sports marketplace
- ★ **'Secure data-at-scale' will be paramount to even enter the race.**

[1] Only 2% of UK sports properties expecting major media rights growth in next five years - SportsPro (sportspromedia.com)

Today's disruptive digital shift is taking the C-suite into 'uncharted territory'

Digital headwinds threaten growth and increase business risk



- ★ Digital, AI / data and network cybersecurity expertise amongst C-level executives is key for success
- ★ **Only 30% of sporting organisations have robust digital strategies** [6]
- ★ Talent gaps across data science, AI and cybersecurity are a serious issue
- ★ Data governance is in its infancy
- ★ **Only 5% of organisations have an enterprise-wide Secure Access Service Edge (SASE) Strategy** [7]



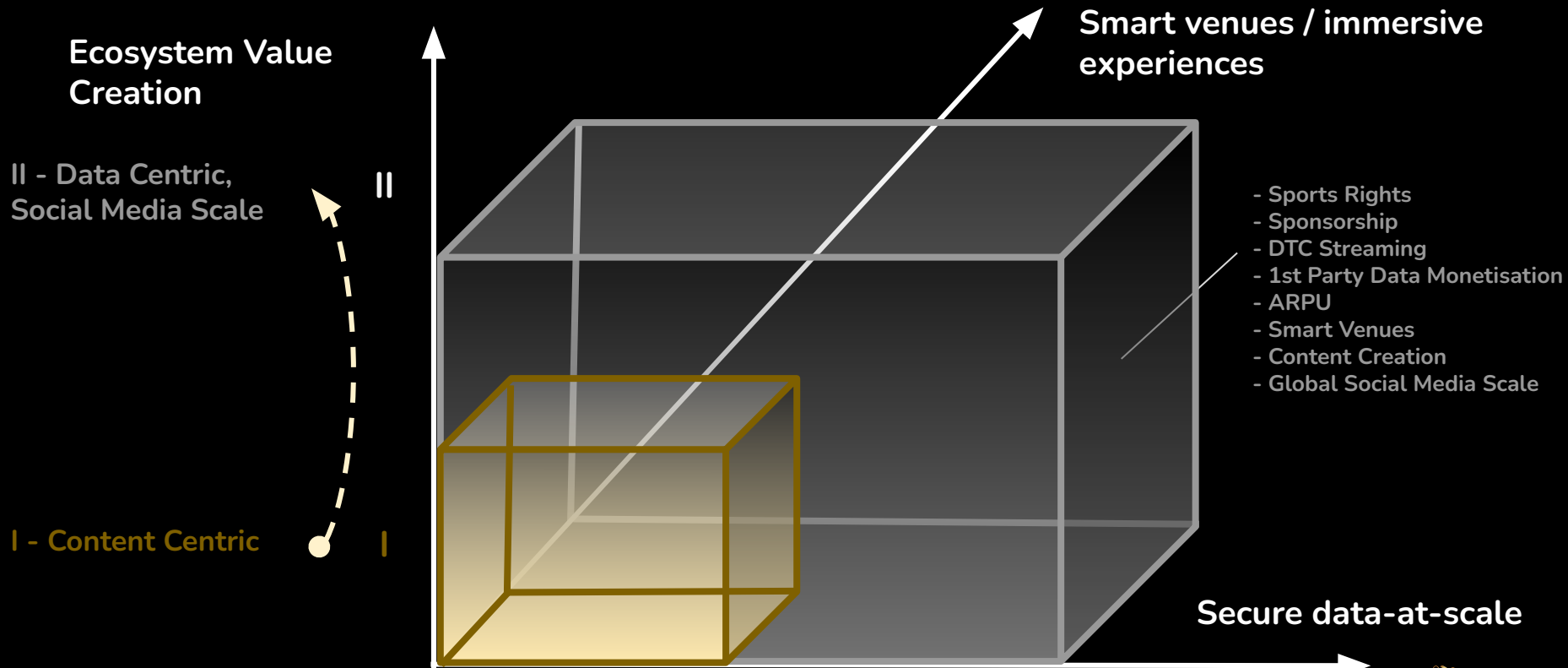
Digital hyper-personalisation and AI-augmented fan experiences are key for business growth

Without an effective data strategy, with explicit C-suite sponsorship, data-at-scale will fail to power AI algorithms for hyper-personalisation and differentiation.

This risks inhibiting digital growth and weakening commercial rights negotiations for sports properties.

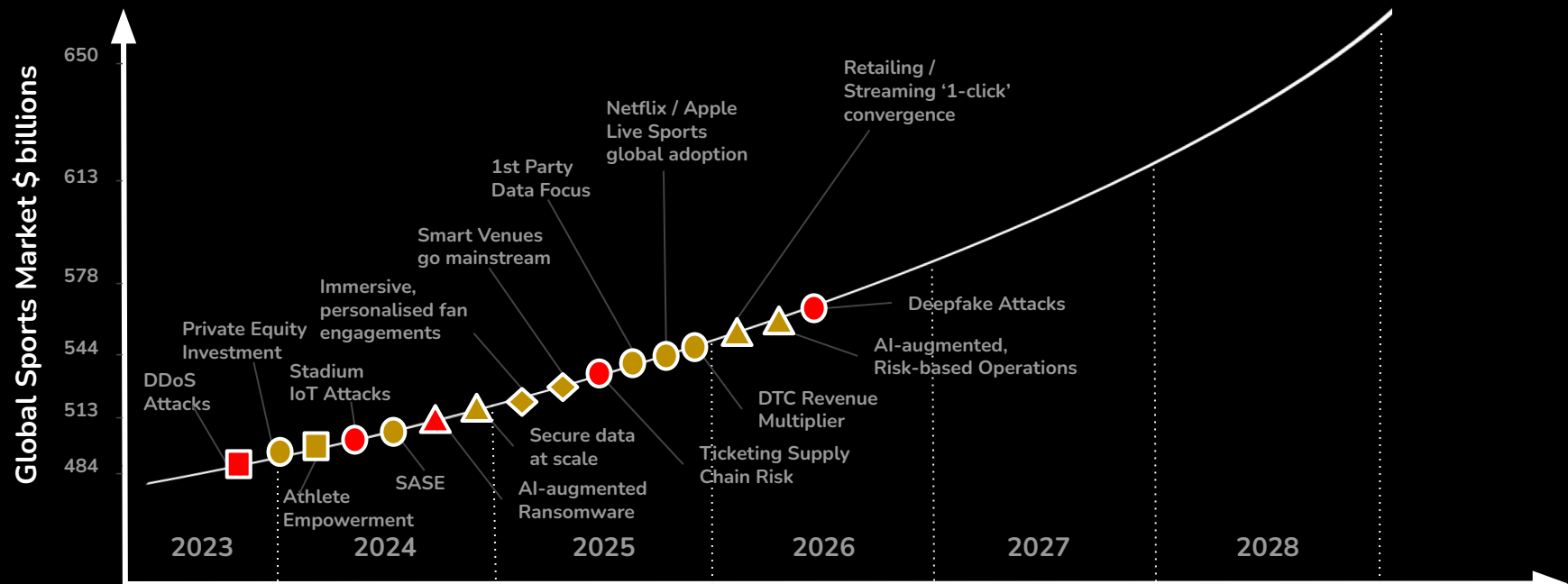
Value Creation for Data Centric Sports Properties

Reimagining digital fan engagements built on secure data-at-scale



Market dynamics impacting global sports market growth

Secure data & AI maturity will be fundamental to profitable growth



Maturity reached:



Less than 1 year



1 - 2 years



3 - 4 years



Plateau

Key:



ENABLER

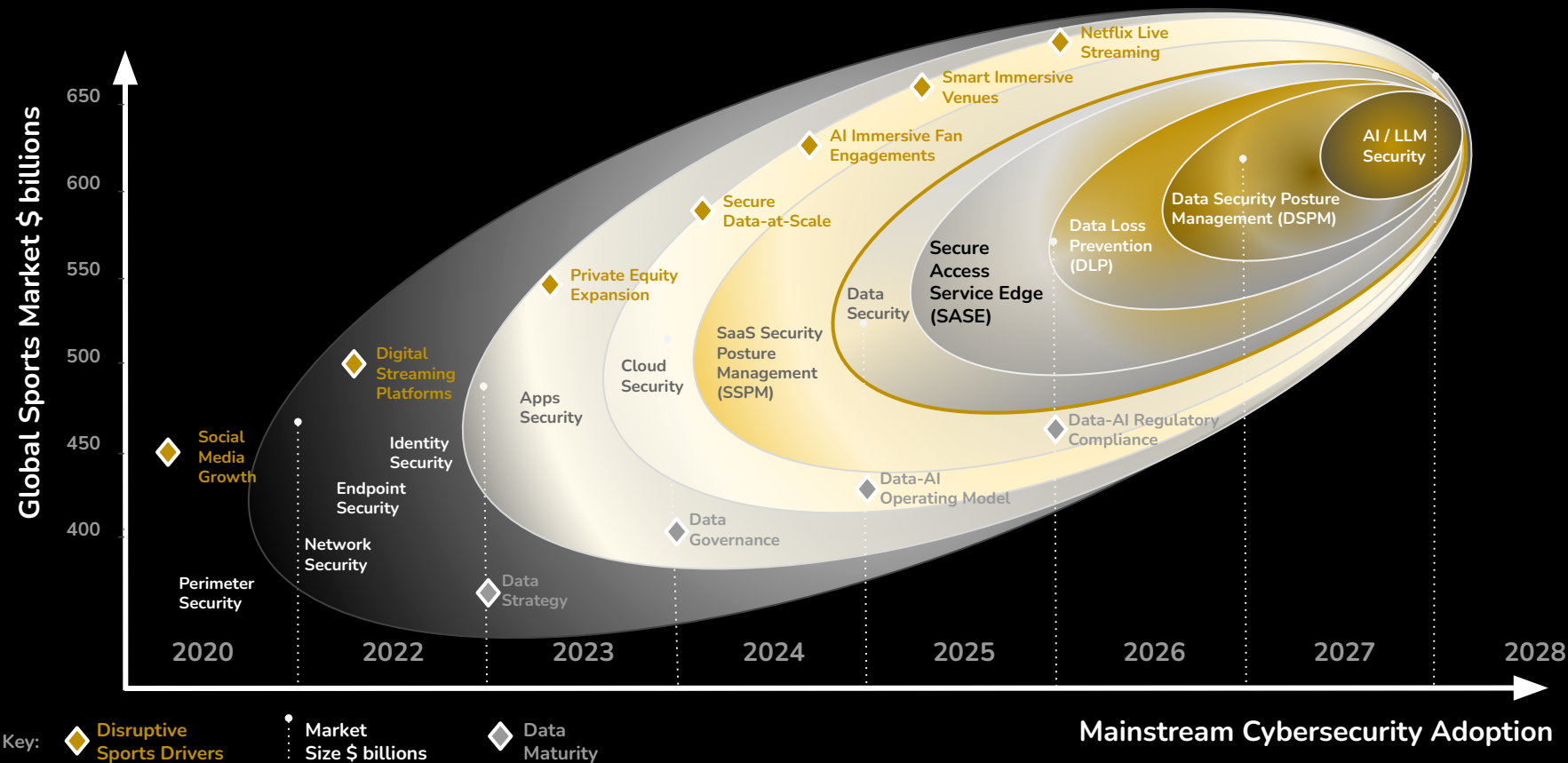


CYBER THREAT

Data-AI-Cybersecurity market dynamics

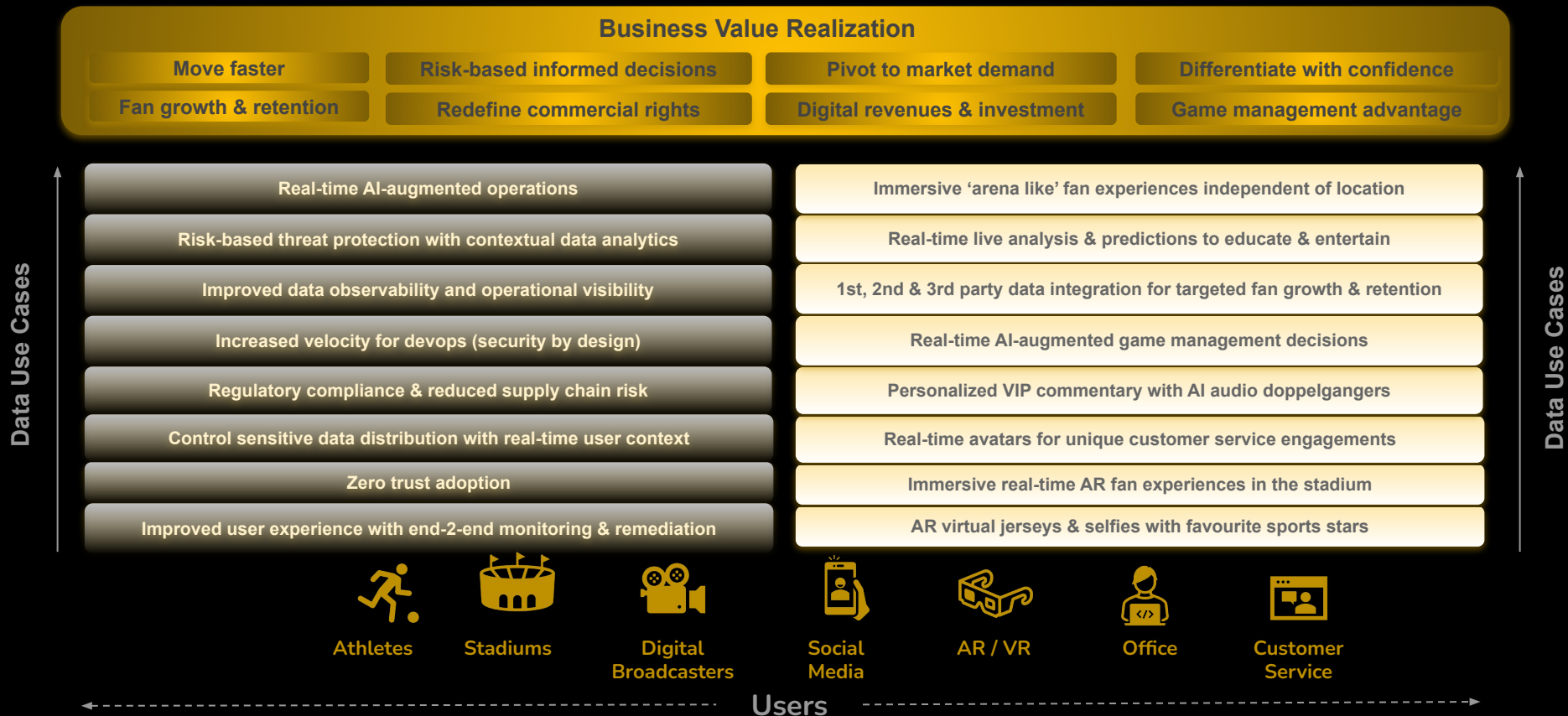
Data is the key business enabler for sports in 2025

Leveraging a 1st party data becomes non-negotiable for sports leaders



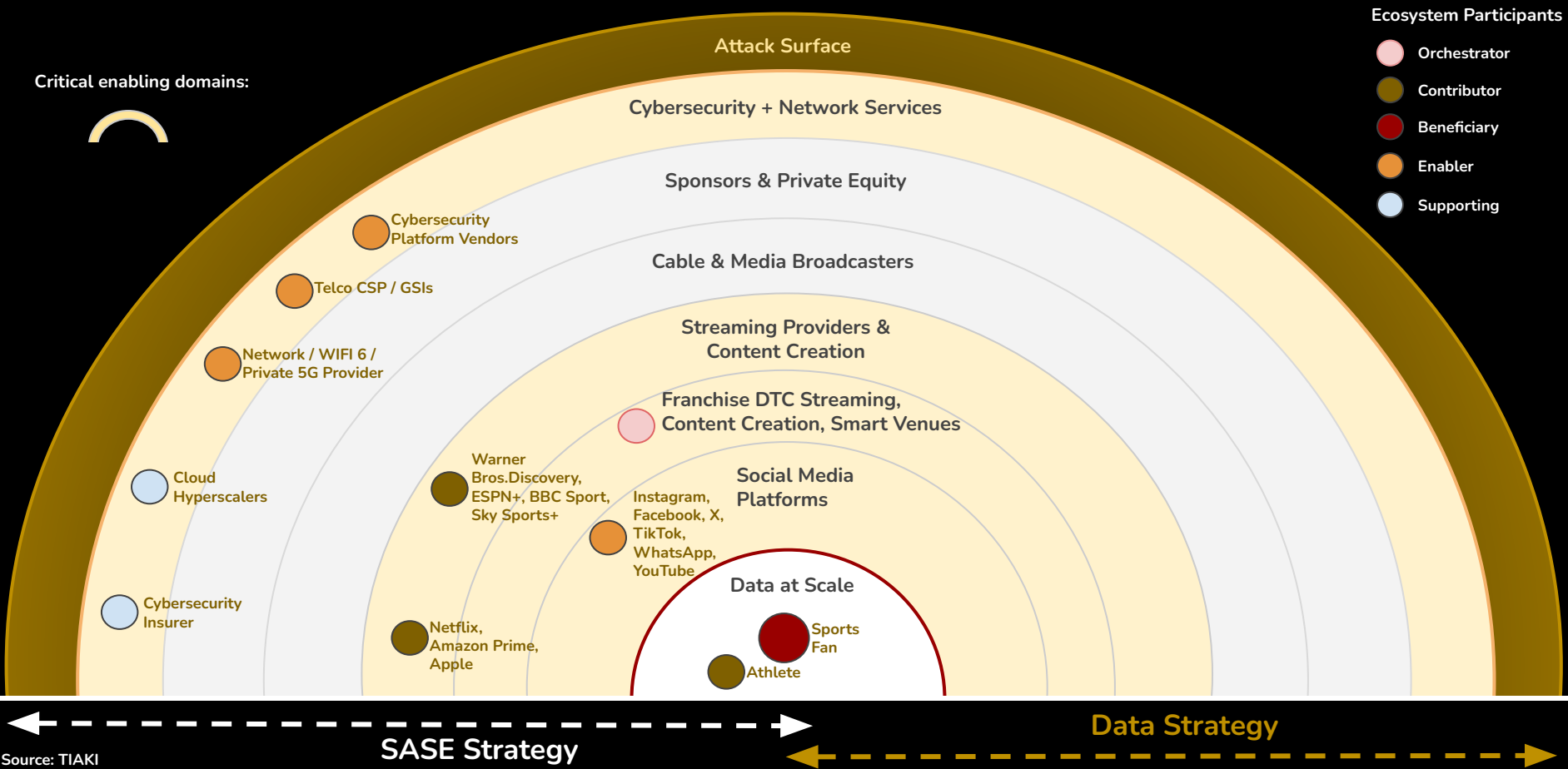
Data-at-scale is the growth lever to power business value

Through embedding a strong data culture foundation across the sports organization



The Data-centric sports property

An enterprise wide data strategy is foundational to create business value differentiation



Our Consulting Approach

Connecting the dots across the entire digital sports industry value chain



- ★ Our consultants work alongside your team
- ★ We offer flexible engagement models
- ★ **We bring unique insights and accelerators to boards, business leaders, investors, data pioneers and cybersecurity leadership teams in sport**
- ★ As your trusted advisors, we seek to fully understand your business objectives and the unique risks that you're facing every day
- ★ **We help your team co-shape the strategic roadmap to provide risk-based resiliency to enable secure digital revenue growth at scale**
- ★ Our guidance provides 'peace of mind' to the C-suite, investors and operational teams.

Data Strategy Engagement for Sports Properties and Sports Broadcasters

Current State Maturity and Compliance, Target State, Business Value Realization, Data Uses Cases & Data Operating Model

I - Data Current State Maturity & Benchmarking

- ★ Data inventory & profiling
- ★ Data landscape analysis
- ★ Data & asset inventory and classification
- ★ Assess data quality, data integrity and data security across the digital ecosystem & networks
- ★ Identify critical data flows, data silos and dependencies
- ★ Data regulatory compliance review & identification of potential compliance gaps
- ★ Competitive benchmarking analysis

II - Data Strategy Development & Transformation Path to Value

- ★ Co-develop data governance framework
- ★ Data & analytics operating model
- ★ Data management roadmap
- ★ Data security & privacy
- ★ Roadmap Development for 1st party data centrality.
- ★ Outline SASE target state architecture.
- ★ Identification & prioritization of high impact data use cases.

III - Data Strategy Implementation, Value Quantification & C-suite Engagement

- ★ Business Case Development for data investments
- ★ Quantify the potential ROI of key data use cases
- ★ Develop financial models to assess the impact of the data initiatives.
- ★ Finalize the roadmap for 1st party data centrality and SASE target state
- ★ Develop implementation plan for the data strategy, data governance, data & analytics operating model, including key performance indicators (KPIs)
- ★ Data strategy C-suite briefings on key findings, recommendations, resiliency, benchmarking results, critical use cases for ROI, areas for investment prioritisation & future innovation

TIAKI bring deep expertise from our personal journeys at



salesforce

pwc



Business

Orange
Cyberdefense



ORACLE



LLOYDS BANK

... which shapes our digital, data, AI and cybersecurity consulting insights in the global sports ecosystem.



About the Author:

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David is the Founder & Managing Partner at TIAKI, where he collaborates with bold and determined leaders in the sports ecosystem to define their data, AI and cybersecurity strategies to deliver sustainable value.

TIAKI is a niche consulting practice helping executive leadership in sport make confident, informed decisions on their risks, investments and business outcomes powered by secure 'data-at-scale'.

TIAKI empowers CEOs, management teams, broadcasters and investors in the global sports industry with strategic advisory frameworks to deliver secure, pioneering digital fan experiences and new ecosystem business models to achieve breakthrough returns.

David has over 20 years of strategy and technology enabled business transformation experience, providing consulting expertise in cloud native technologies, data strategy, digital business enablement and cybersecurity strategy. He is passionate about helping talented leadership teams succeed in securely growing their differentiated business models in the data-driven, digital sports economy.

Based in Stockholm, David previously worked for IBM Consulting, EY, Accenture Strategy and Orange Business. He studied Chemistry at Durham University and holds an MBA from Trinity College, Dublin Business School.

