

DATA & ANALYTICS

MATURITY OF AUSTRALIAN SPORTS ORGANISATIONS

RESEARCH AND INSIGHTS BY GEMBA

JULY 2022

DATA
GAMES



SPORTS TECH
WORLD SERIES

FOREWORD

Gemba works strategically with large and small-scale sports organisations across Australia and around the world to improve their commercial performance. In our work in the past decade we've seen data and analytics emerge as a tool, capability, technology layer, and strategic priority for many Australian sports organisations.

Most senior sports business executives accept the importance of data to their on-field and off-field success. However, Gemba continually observes a large gap between aspiration and execution.

This is most readily seen in the gap between the promise of a single customer view and the reality of:

- Disparate and incomplete data sets
- Poor data access
- Limited focus
- Low investment

All of the above lead to internal frustration at apparent lack of progress.

Meanwhile, other industries are moving ahead. They're optimising their operations through building predictive models that use data to anticipate changes. The Australian sports industry, however, remains mainly focused on descriptive analytics, i.e. studying what's already happened.

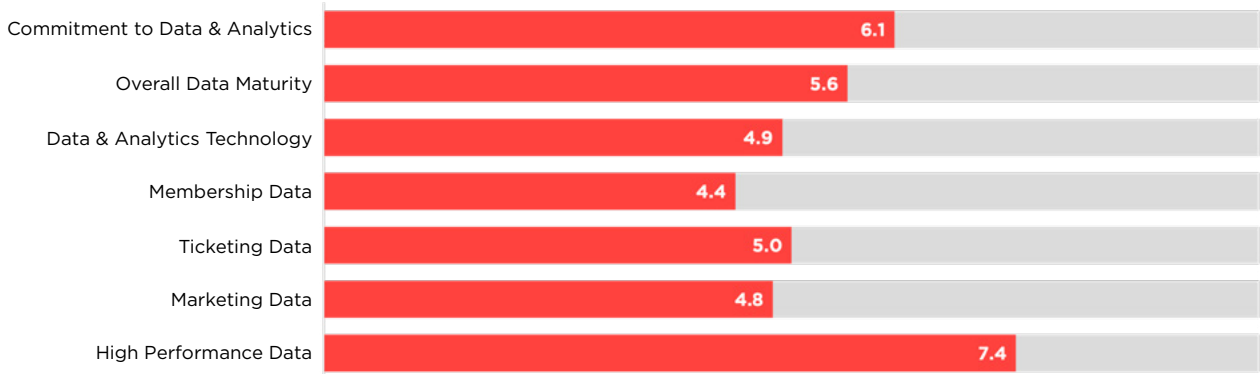
Advanced analytics often seems to require hiring large teams of data scientists and analysts and implementing expensive technology stacks. Demand for qualified and capable data scientists means these resources are expensive to hire and hard to maintain. Data storage and analytics technology is also expensive and is costly to maintain and operate. Once an organisation implements a solution, upgrade and improve demands are potentially limitless.

In the cost-constrained Australian sports sector, most organisations Gemba encounters struggle to bridge the gap between intent and execution regarding data strategy.

To better understand this challenge, Gemba has undertaken research among Australian sports organisations. To understand the industry's current state of data and analytics maturity, we've studied national governing bodies and leagues, state associations, clubs, and stadium operators. In partnership with the [Sports Tech World Series](#), this research underpins our "Going to Gemba" focus on **Data Games: How Data & Analytics is driving the business of sport.**

The results, summarised in the chart below, support our observation of a gap between intent and reality regarding data and analytics.

**AUSTRALIAN SPORTS ORGANISATIONS
DATA & ANALYTICS SELF-ASSESSMENT (10 POINT SCALE)**



Source: Gemba Data Games Survey 2021

On a ten-point scale, Australian sports organisations say their commitment to data and analytics is 6.1 on average. But their overall data maturity is just 5.6, while their satisfaction with their data technology, use of membership and ticketing data – and data-driven marketing – is barely half of what they believe it could be. Only in the high-performance area do Australian sports organisations feel moderately satisfied with their use of data and analytics. Yet even here there’s significant scope for improvement with respondents rating themselves only 7.4 on average.

Our research found that most sports organisations plan to invest further in data and analytics capabilities in the next 12 months. But it’s a concern that many of them don’t appear to have clear strategies for data that will help direct their investments to deliver measurable returns. 72% say their organisation mentions data in its corporate strategy, but fewer than half have a specific data strategy. In addition, many of those entities say their data strategy aims to make them “a more data-driven organisation”, which we view as a goal too vague to produce measurable outcomes. Only 20% say their data strategy is centred on delivering improved commercial returns to their businesses.

Gemba’s view is that investment in data and analytics can, and should, deliver immediate and long-term tangible value to businesses.

The capacity to ascertain benefits early helps create buy-in and confidence to continue investing. Every sports organisation should have a clear strategy for understanding how data and analytics adds value, and a plan to apply:

- Appropriate levels of expertise (in-house, consultancy, or hybrid)
- Shifts in process and culture (to create a ‘data mindset’ across the organisation)
- Smart use of available enabling technology (avoiding heavy capex that can lead to “a Ferrari in the garage no one knows how to drive”)

To shape a future for the Australian sports sector that can leverage the rich data our industry generates – first and third-party, members and ticket buyers, digital viewers and social followers, participants and prospects, on-field and training performance – we need to close the gap between intent and execution.

This report is a call-to-action for the industry to move from the era of talking about data into a new era of practical and meaningful data strategy implementation that drives commercial and customer growth.

MARK ZUCCO
Gemba Head of Strategy, Data & Analytics

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INTENT VS EXECUTION: THE DATA GAP WITHIN AUSTRALIAN SPORTING ORGANISATIONS

01

As an industry we have been talking about the importance of data – to deliver strategic insights, to improve our understanding of fans and members, to drive commercial growth, and so on – for a decade or more. **But the gap between intent and execution remains wide.**

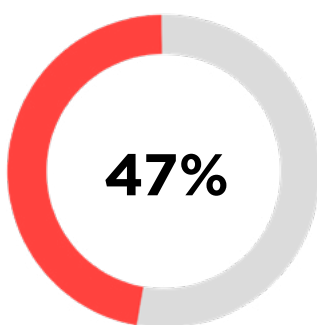
Gemba's research shows that while most Australian sporting organisations say they are committed to data and analytics, fewer than half have a data strategy in place. One third rate themselves as having low or no capabilities in this space, and 14% have no data resources in their organisation at all. Only 4% of organisations we surveyed self-rated as having a high level of capability in data and analytics.

DATA COMMITMENT



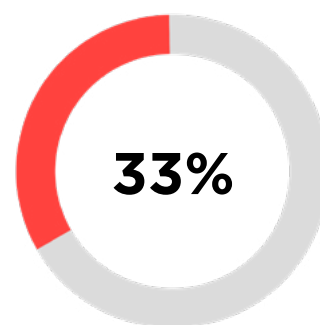
On average, respondents rated their organisation's overall commitment to data and analytics **6.1** on a 10-point scale

DATA STRATEGY



While 72% of respondents said that data was referenced in organisational objectives, only **47%** have a data strategy

DATA CAPABILITY



33% of respondents said their organisation has "None" to "Low" capability when it comes to data

Source: Gemba Data Games Survey 2021

We must question what's causing this persistent gap between intent and execution. We're all talking about data, but few sporting organisations have cracked the code and are implementing a data strategy to deliver meaningful value back to their business.

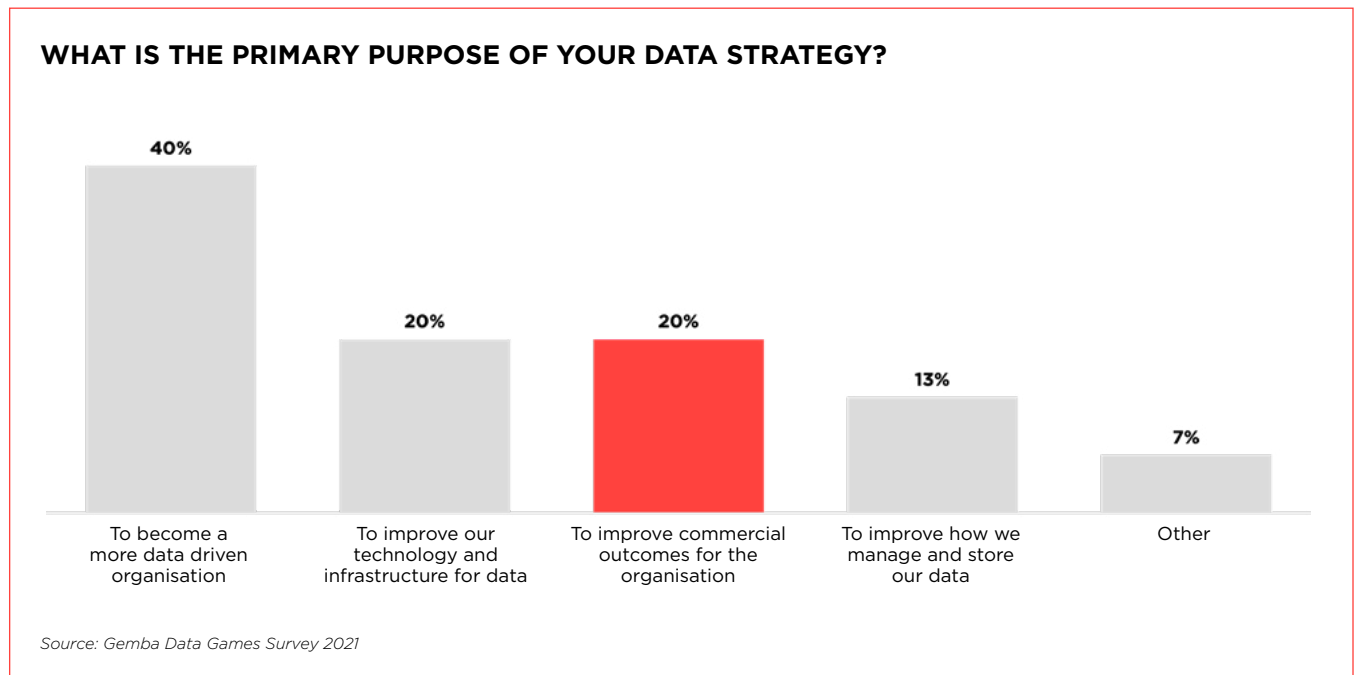
Our research suggests there are large gaps between management-level acknowledgement that data is important, the knowledge to identify why it's important, and the capabilities to define and execute how to use it to drive value.

INTENT VS EXECUTION: THE DATA GAP WITHIN AUSTRALIAN SPORTING ORGANISATIONS

Incapability is the most cited reason why Australian sports organisations don't have data strategies in place. There is a basic lack of skills in the sector to connect intent to strategy and execution.

But perhaps more concerning is that most respondents to our research saw data strategy as an end in itself, not as a fundamental enabler of future business success (either on or off-field).

Only 20% of respondents said their data strategy is primarily about improving their organisation's commercial outcomes. The rest focused on specific data management issues (improving data technology and improving how data is managed and stored), or the noble but vague aspiration "to become a more data-driven organisation".



This is data strategy for its own sake. It's better than nothing, but it creates the risk that data efforts will be piecemeal and therefore valueless, undermining the case for investing properly in data technology and for using data effectively to grow the business.

Without clear and measurable objectives, investment in data strategy will lack focus, legitimacy and traction. Without a commercial objective for data strategy, it's unsurprising that many sports organisations are struggling to connect intent to execution.

"The Analytics team does a great job with what they have but there is no real buy-in at an exec level into the importance of data as a tool to enable decision making, cost savings and future value."

An Australian National Sporting Organisation

KEY POINTS

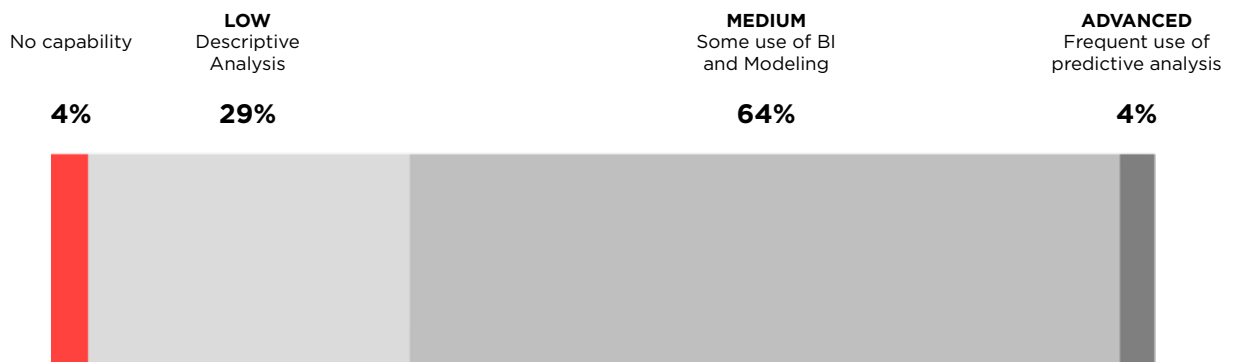
1. Despite a decade or more of talking about the importance of data, less than half of Australian sports organisations surveyed by Gemba have a data strategy in place
2. 33% say their level of data and analytics capability is "None" or "Low"
3. Only 20% have a data strategy that is focused on delivering improved commercial outcomes for the organisation

02

DATA STRATEGY, STRUCTURE AND CAPABILITY

While many sports organisations are implementing some level of data analysis, business intelligence (BI) or modelling, around a third are still doing no more than reporting on what has happened (basic descriptive analytics).

SELF-RATED DATA AND ANALYTICS CAPABILITIES



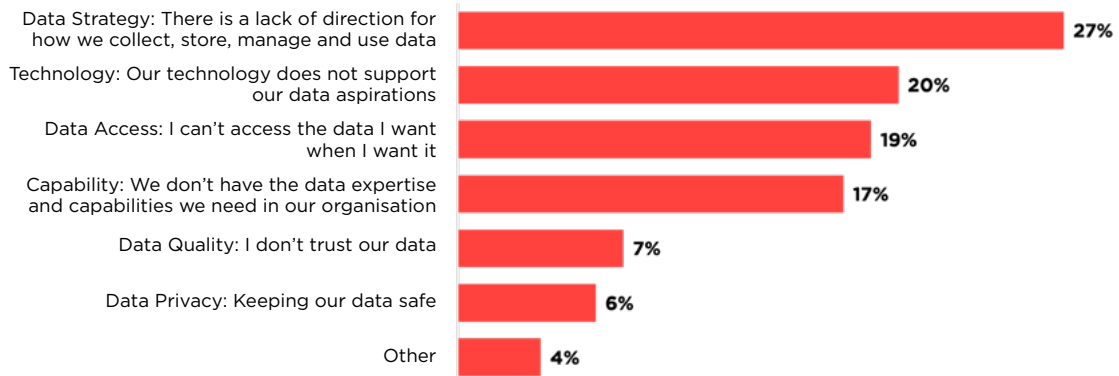
Source: Gemba Data Games Survey 2021

The lack of a coherent approach, appropriate technology and access to data, and the capabilities to use it are limiting many organisations' ability to embed analytics as a core capability and competitive advantage. The biggest challenges to playing and winning the data game identified in our research are:

1. Lack of direction (data strategy)
2. Technology that doesn't support data aspirations
3. Inability to access data when it's needed
4. Lack of data expertise and capabilities

DATA STRATEGY, STRUCTURE AND CAPABILITY

BIGGEST CHALLENGES | PROPORTION OF RESPONDENTS RATING ISSUE AS A “TOP 3 CHALLENGE”



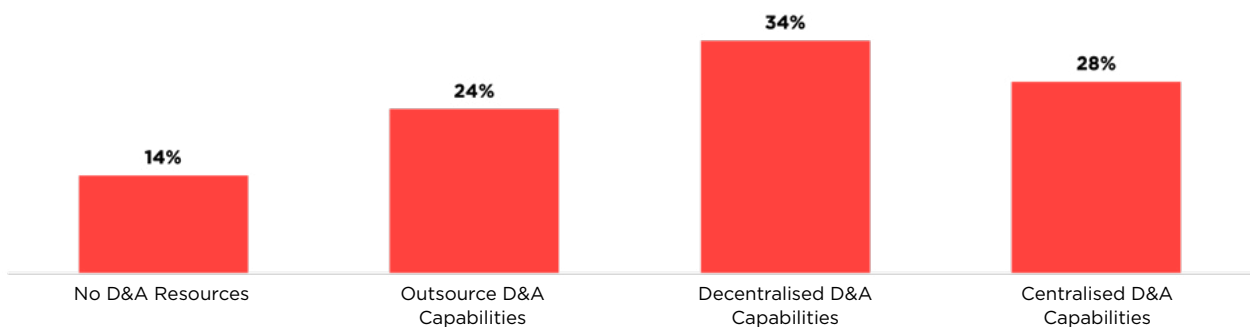
Source: Gemba Data Games Survey 2021

As Australian sports organisations have started to explore the use of data in their businesses, they're taking a variety of approaches for how to structure their data teams. Inevitably, for clubs, state sporting organisations and smaller sports, the capacity to invest in expensive data analytics teams and technology is limited.

In Gemba's experience, most sports organisations in Australia have hired a maximum of two people with data and analytics skills. Banks, retailers, airlines, telcos, betting companies and other large businesses have invested heavily in highly trained and expensive data scientists, and large technology implementations to support them. The market for skilled data analysts is highly competitive and, for many sports, inaccessible. As a result, most sports organisations make do by having their existing digital, commercial, marketing, membership or finance executives perform data analysis, make decisions around technology, and generally lead data strategy development and execution. Many are out of their depth in this area.

It's likely a general lack of focus on data strategy – and the scarcity of affordable data experts in Australia's sports business sector – is causing sports to take a variety of approaches to structure. Fourteen per cent say they have no data and analytics resources, while a quarter outsource this capability. Thirty-four per cent have resources spread across departments in a decentralised model, while 28% have centralised data and analytics capabilities.

HOW ARE DATA RESOURCES STRUCTURED IN YOUR ORGANISATION?

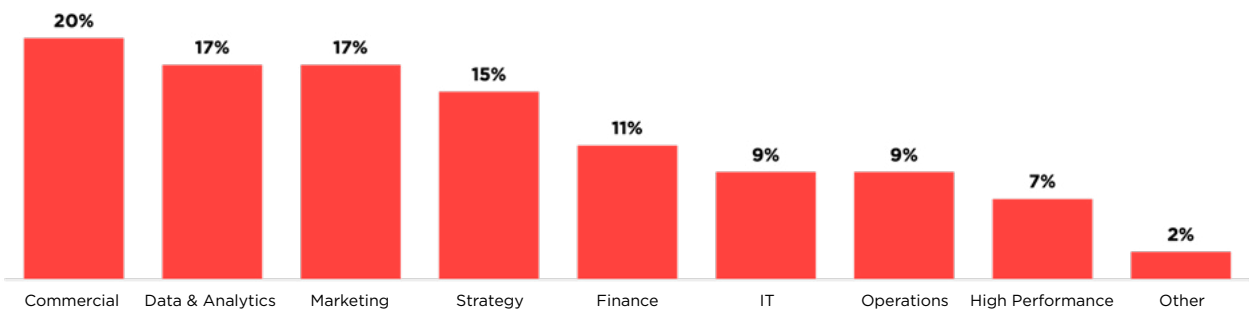


Source: Gemba Data Games Survey 2021

DATA STRATEGY, STRUCTURE AND CAPABILITY

Commercial or marketing teams – or teams within dedicated data and analytics groups – often manage the data challenge. In working with sports organisations on their data strategies, we’ve found many commercial and marketing executives have minimal capacity and capability. They can dedicate only limited time to building strong analytics capability. The relentlessness of sport, often week-to-week and with shrinking off-seasons, means strategic focus is difficult to achieve.

DEPARTMENT RESPONSIBLE FOR MANAGING AND IMPLEMENTING DATA STRATEGY



Source: Gemba Data Games Survey 2021

It’s increasingly clear from our work with sports organisations that the important skill of data engineering is often overlooked or missing. With clean, structured data and modern tools such as PowerBI or Excel, dashboards are easy to build. But we’re seeing a significant capability gap in the skills that allow organisations to bring disparate data sources together, cleanse and query the data, and automate the data pipeline to a presentation layer for visualisation.

About 20% of the organisations we surveyed have sought external support to define and begin executing their data strategies. This external support has been in areas such as:

- Data strategy
- Technology/software implementation
- Data analysis



DATA STRATEGY, STRUCTURE AND CAPABILITY

There's no one-size-fits-all approach to structure. For some, providing data analytics capability in-house makes sense to build intellectual property and competitive advantage. For others, the cost-effective route will be to augment internal staff with specialist consultants or partners who can bring best-practice across a range of data capabilities.

What's vital is that data and analytics are used to deliver clear business outcomes across commercial, marketing, digital, finance, and high performance, with executive leadership driving prioritisation and investment. This requires strong buy-in across the business, and internal processes and culture that prevent silos and encourage collaboration and curiosity around data.

"Data is very much on the agenda, but its role and positioning is unclear... It's important but currently unclear on imperatives for the whole organisation, with department silos meaning a lack of unified focus."

An Australian National Sporting Organisation

KEY POINTS

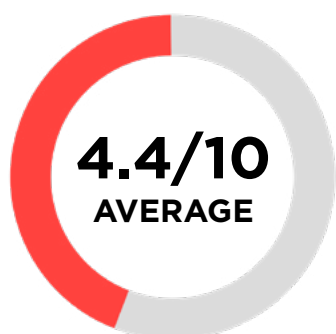
1. Main reasons Australian sports organisations are losing the data game: lack of direction (data strategy), technology that doesn't support data aspirations, an inability to access data when it's needed, and a lack of data expertise.
2. Data is too often remaining locked up in organisational silos.
3. Critical data engineering skills are scarce across the industry. Most organisations spread their limited data resources across commercial, marketing and strategy departments, although some are moving to centralised data and analytics departments.

MEMBERSHIP AND TICKETING

Acquiring and retaining members – and selling tickets – remains core business for many Australian sporting organisations. It’s also activity that provides rich fan-based data, including valuable first-party data on the most engaged fans.

Given this critical function, particularly for clubs, it’s troubling to find so many organisations say they’re reaching barely half of their potential to leverage membership data.

MEMBERSHIP | SATISFACTION WITH DATA UTILISATION



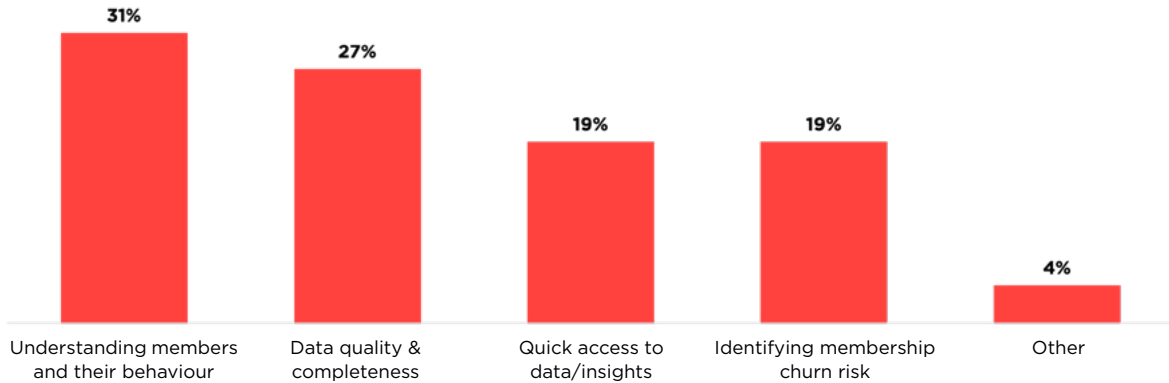
SPORT	AVG. RATING
Rugby League	5.1
Netball	4.5
Cricket	4.5
AFL	4.0
Other	3.9

Source: Gemba Data Games Survey 2021

Organisations focus on membership data and analytics to better understand their members’ behaviour, and to identify and mitigate churn risk. But access to complete and high-quality member and fan data remains a challenge for member-based sports organisations.

MEMBERSHIP AND TICKETING

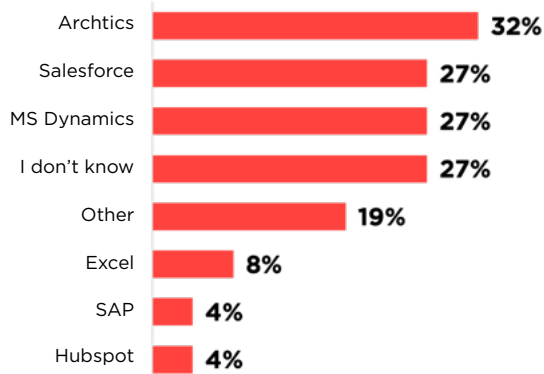
MEMBERSHIP | BIGGEST CHALLENGES



Source: Gemba Data Games Survey 2021

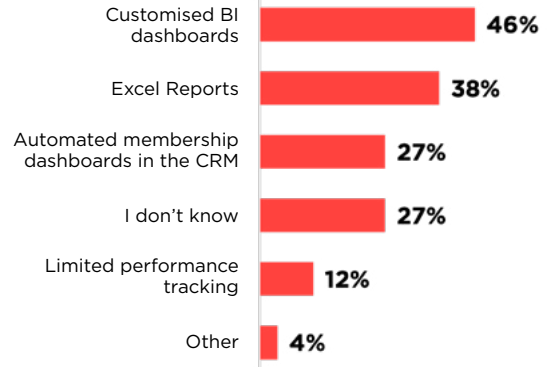
Australian sports organisations widely use sophisticated and specialised software for membership, including Archtics, Salesforce and MS Dynamics. We found that almost half of respondents had built customised business intelligence dashboards, with another quarter using automated membership reports and dashboards within the software. But a third are still using Excel reports to track, report on and analyse membership performance.

MEMBERSHIP | SOFTWARE USAGE



Source: Gemba Data Games Survey 2021

MEMBERSHIP | PERFORMANCE TRACKING



Source: Gemba Data Games Survey 2021

"We may track membership data on one level but that profile isn't augmented by data from any other parts of the business, so the member profile is largely redundant, duplicated across business areas and/or incomplete. That means that it is not reliable enough to inform any decision making or garner insights."

An Australian National Sporting Organisation

MEMBERSHIP AND TICKETING

Ticketing data is the other regular source of fan data flowing to Australian sports organisations. For this source to drive business improvement, significant gains must be made in data quality, completeness, integration, and analysis.

On average, respondents rated themselves only 5.0 out of 10 in terms of satisfaction with their organisation's ability to best use ticketing data, and only 4.8 on their confidence in being able to capture valuable customer data from ticketing providers.

TICKETING | CONFIDENCE AND SATISFACTION WITH DATA

CONFIDENCE IN TICKETING DATA



On average, respondents rated their confidence in their organisation's ability to capture customer data a **4.8** on a 10-point scale

SATISFACTION WITH TICKETING DATA

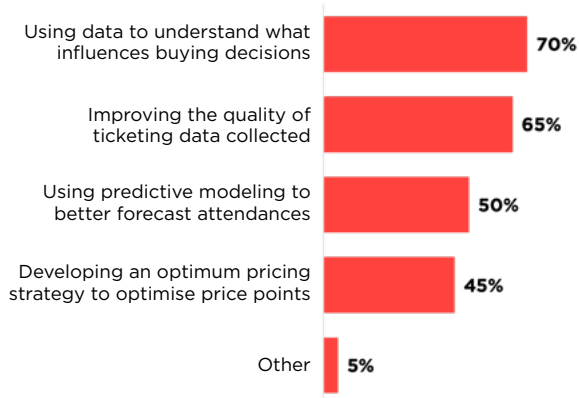


On average, respondents rated their satisfaction with their organisation's ability to best utilise their ticketing data a **5.0** on a 10-point scale

Source: Gemba Data Games Survey 2021

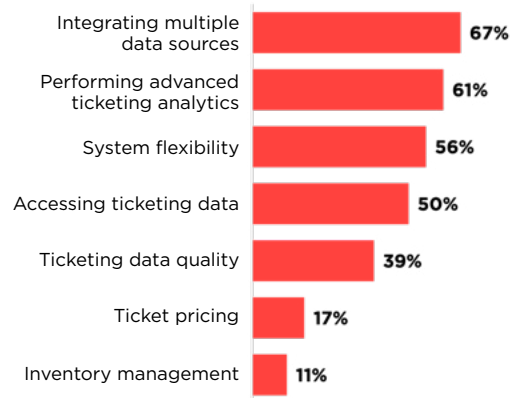
As with member data, most organisations want to use ticketing data to better understand their fans and what drives their purchasing decisions. Some are looking to use ticketing data to optimise ticket pricing strategies, or to predict attendances more accurately.

TICKETING | OBJECTIVES



Source: Gemba Data Games Survey 2021

TICKETING | BIGGEST CHALLENGES



Source: Gemba Data Games Survey 2021

MEMBERSHIP AND TICKETING

Given that ticketing is central to business operations, it's concerning that challenges around ticketing data have more to do with technology, process, data integration, data access, and data quality than optimisation of strategies based on analysis. It's another clear example of the gap between intent and execution holding back Australian sports organisations.

We must be able to integrate data from disparate sources, apply flexible fit-for-purpose tools, and be confident in the quality of data and timely access to it, before we can expect sports organisations to optimise analysis around pricing, yield, inventory management, and member conversion and retention.



“Due to so many other variables, such as content, team performance, weather, time of event, etc. it is difficult to get accuracy of greater than 85% from ticketing data to meet our objectives.”

An Australian Stadium Operator

“We get basic level ticketing data but it isn't being augmented by any other data so it only exists in isolation.”

An Australian National Sporting Organisation

KEY POINTS

1. 4.4 out of 10 satisfaction with leveraging member data is a huge misfire, given membership's importance for fan engagement and commercial returns.
2. Poor data quality – and inability to quickly access trustworthy membership data and insights – is preventing organisations from understanding member behaviour or anticipating churn.
3. Because they can't integrate disparate data sources, organisations aren't using data to optimise membership and ticketing yield.

MARKETING

Australian sports organisations say they're dissatisfied (4.8 out of 10, on average) with how they're using data for marketing.

Sports business and sports technology conferences over the past five years have been rife with talk about personalisation and automation. This refers to CRM technology's power to deliver a single view of a customer, empowering your organisation to deliver the right message to each fan at the right time and via the right channel, but there's a significant gap between reality and the dream this technology represents, which comes back again to the gap between intent and execution.

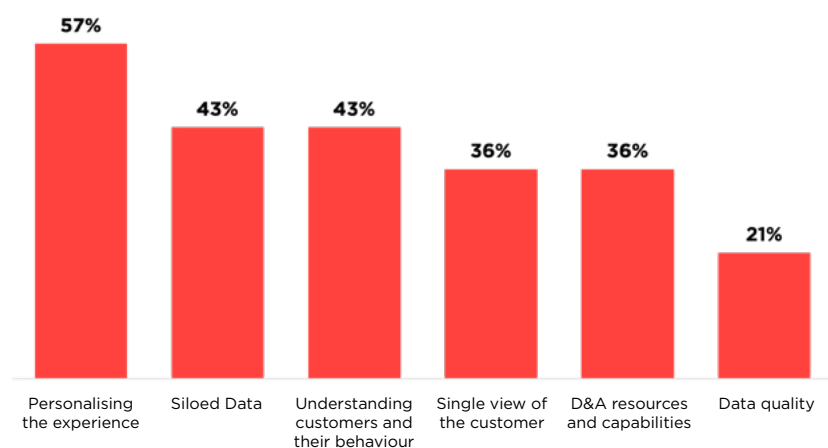
Organisations want to understand customers and deliver personalised experiences for fans, members and participants, but they can't because of siloed data, poor data quality, and a lack of data and analytics resources.

MEMBERSHIP | CHALLENGES AND SATISFACTION



On a 10-point scale, respondents rated their satisfaction with their organisation's use of marketing data a **4.8** on average

TOP CHALLENGES

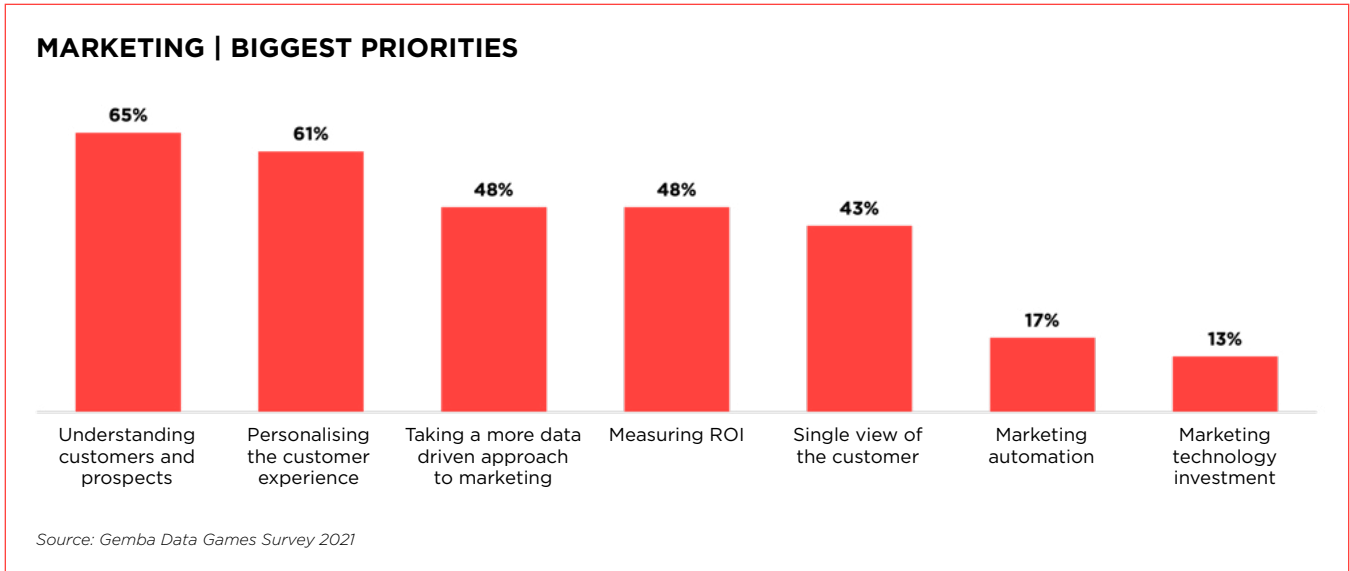


Source: Gemba Data Games Survey 2021

MARKETING

Advanced marketing automation approaches are limited for most organisations due to siloed data, unavailability of the single view of customer, and limited (if any) fan or participant segmentation. Only 6% of organisations currently use marketing automation software in their marketing toolkits.

Investing in marketing technology or marketing automation rank low among sports marketing priorities in Australia; the primary focus is on high-level (but less specific) data strategy objectives like better understanding customers and prospects and taking a more data-driven approach to marketing.



“We are in early stages of using data to achieve our marketing objectives.”

An Australian Stadium

“The intent is there (to use data to achieve our marketing objectives), but it’s taking time to action and organise.”

An Australian National Sporting Organisation

KEY POINTS

1. Siloed or incomplete data is preventing organisations from achieving the near universal goal of better understanding fans and customers and personalising their experiences.
2. Very few organisations have implemented marketing automation tools, and for most this remains a low priority behind data wrangling to establish a single view of the customer.
3. Overall, the industry is at the embryonic stage of its journey towards data-driven marketing.

ON-FIELD HIGH PERFORMANCE

Australian sports organisations feel they're doing well with data and analytics in the area of player statistics, physical performance monitoring, and sports science. It's here, rather than in sports marketing, that we see the best harnessing of technology and the richness of data points, especially those generated from on-field or training interactions.

Respondents rated the high-performance area by far the leader in terms of capability and effectiveness in using data to create value.

There are clear and measurable benefits for using data to gain a competitive edge or make marginal improvements to peak athlete performances. It's likely why sports organisations have prioritised any analytics strengths they have into this area. On the commercial side, however, the benefits don't appear as tangible. There's ambiguity and, arguably, complexity in what data can be collected, who "owns" it, and how to apply it for commercial advantage.

HIGH PERFORMANCE | USE OF DATA AND CAPABILITY

USE OF DATA



On a 10-point scale, respondents rated their high-performance team's use of data a **7.4** on average

CAPABILITY



On average, respondents rated their high-performance team's capability with data a **6.8** out of 10

Source: Gemba Data Games Survey 2021

ON-FIELD HIGH PERFORMANCE



Respondents want to improve their use of the large amounts of on-field and high-performance data generated, and increase adoption of data analytics methods and insights from coaches and players. For high performance, issues around technology, and the collection, storage and quality of data, were seen as less problematic. This is opposite to the commercial and fan side of sports businesses, where most respondents don't have the foundations in place to start benefiting from advanced analytics.

KEY POINTS

1. Widespread among organisations, the use of on-field and training data to improve sporting performance was the one area in which respondents rated as relatively high their capabilities and satisfaction with data use.
2. Technological foundations for collection, storage and quality of data are broadly in place for high performance data analytics. Areas for improvement are making better use of data athletes generate, and greater adoption of data analytics methods and insights from coaches and athletes.
3. We need to consider how organisations can transfer their high-performance departments' analytics capabilities to their commercial, membership, ticketing, and marketing departments.

THE TECHNOLOGY LAYER

Technology is the enabler of data strategy, not the starting point.

Many sports organisations approach the question of data and analytics from the wrong direction. Too many say things like “we need a new CRM” when they should be asking how they can use data to improve their businesses, and therefore what capabilities, processes, culture, data, and technology they need to achieve it.

Implementation of a data strategy inevitably involves technology. And some Australian sports organisations have invested heavily in technological infrastructure to underpin their data strategies. This has mainly been larger, national sports governing bodies that can afford to develop these foundations and consolidate capability at scale for their member associations or clubs.

Yet we found most respondents were dissatisfied with their organisation’s data and analytics technology solutions. Even the most advanced sports organisations still view themselves as significantly short of where they want to be.

DATA TECHNOLOGY | SATISFACTION



SPORT	AVG. RATING
Netball	6.5
Rugby League	5.0
Cricket	4.8
AFL	4.7
Other	4.7

Source: Gemba Data Games Survey 2021

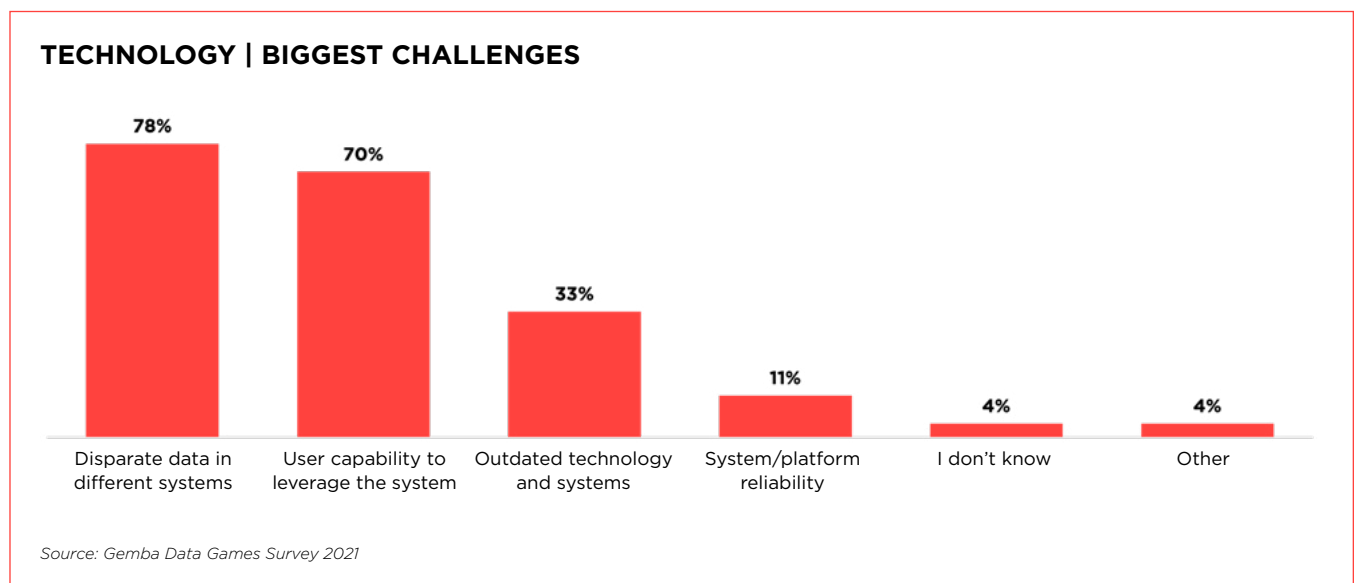
THE TECHNOLOGY LAYER

The promise of a “single customer view” is now embedded in the thinking of most Australian sports organisations. It’s an important goal, but creating that view is difficult and expensive, and therefore sometimes almost impossible to achieve.

Disparate data in different systems and low capability to put existing technology to full use were the two biggest technology challenges respondents cited. Most sports organisations spoke about the complexity that results from federated governance models. National and state bodies each have responsibility to deliver, manage, and grow the sport at different levels. Or leagues and clubs each have claims on “owning” the customer relationship.

A shared services model makes theoretical sense when a national governing body’s scale delivers efficiencies and capabilities to smaller state associations or clubs. But in practice most sports are struggling to resolve questions such as:

- Who owns/controls data
- Who’s responsible for collecting, cleansing, storing, enriching, and analysing data
- Who can access data
- Who owns what part of the customer journey
- Who can communicate about what with a customer
- How to develop capabilities across different levels of a sport to effectively use the technology in place



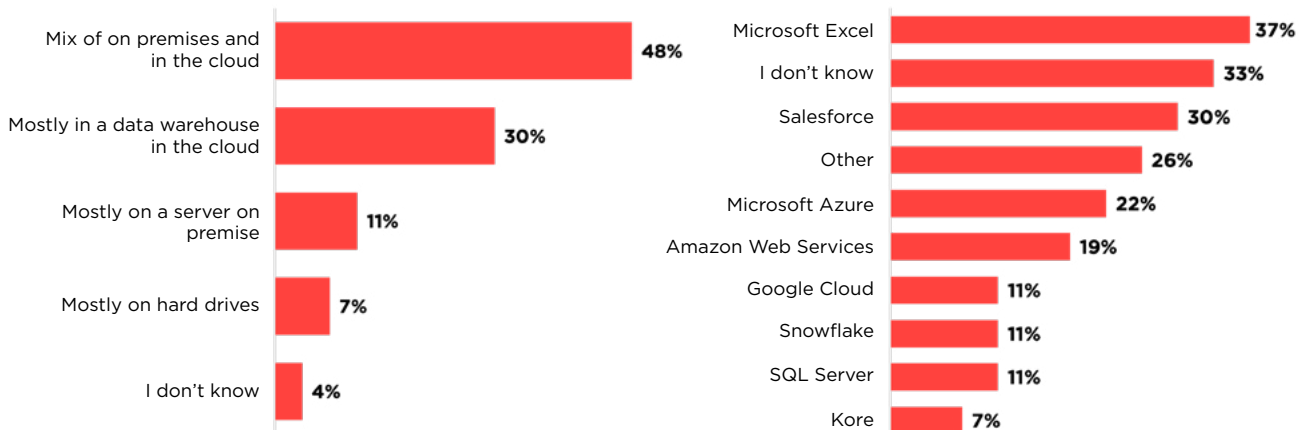
Despite structural challenges, most organisations have started moving their data to the cloud, with only 20% hosting their data on an on-premises server or mostly on hard drives. Almost half retain a mix of storage solutions (some on premises, some in the cloud) likely reflecting the disparate systems and lack of technology integration across business functions.

Application of enterprise grade cloud data storage and technology is happening, but it’s spread across a variety of approaches, from the walled gardens of integrated software providers Salesforce and Kore, to managed cloud storage services from Amazon, Google or Snowflake.

Microsoft Excel and “I don’t know” were by far the top responses to the question of what technology or software provider(s) do Australian sports organisations use to store data.

THE TECHNOLOGY LAYER

TECHNOLOGY | DATA STORAGE AND TECHNOLOGY



Source: Gemba Data Games Survey 2021

Excel is the tool of choice for visualising and analysing data; 62% of respondents use it for this purpose, ahead of PowerBI (50%) and Tableau (38%). Most organisations are using Excel in combination with one of these other tools, as they start to explore the value of specialist data visualisation platforms.

Not all sports have the capital (or the need) to invest in expensive technology to manage their data. For smaller data sets with low complexity modelling requirements, Excel is certainly capable of providing most reporting and analysis an organisation might need.

But if sports executives want to bridge the gap between intent and execution, it's vital they increase their knowledge of and skills in the technology landscape that underpins data strategy.

"As an SSO we are unable to manage our own data successfully as so much is set by the NSO."

An Australian State Sporting Organisation

"Without a data strategy and making data collection, storage and use a core KPI across the organisation, there is no driver for technology to invest in ensuring our platforms and products are enabled to capture and/or leverage data. As a result, data is often an afterthought."

An Australian National Sporting Organisation

KEY POINTS

1. A "single customer view" remains out of reach for most sporting organisations: 77% cite "disparate data in different systems" as among their top three technological challenges.
2. Sports that have invested in technology haven't always followed up with investment in resources and capability to use technology effectively for business growth.
3. Visualisation tools such as PowerBI and Tableau are gaining in use to augment spreadsheet reporting. Many organisations are moving data storage into the cloud or maintaining a mix of cloud and on-premises storage solutions.



DATA GAME PLAN: WHAT'S NEXT FOR AUSTRALIAN SPORTS ORGANISATIONS

07

The time for data talk is over. It's now time for action.

In a data-rich world, the Australian sports industry must bridge the gap between intent and execution to remain competitive and continue to deliver compelling entertainment for fans and commercial outcomes for partners.

Decisions based on hunches or gut feelings are no longer viable. Experience is important but experience that data and advanced analytics supports is more powerful. COVID has forced cost reductions across the sector, and strategic decisions on where to direct investment have never been more critical. Data must underpin and substantiate these decisions.

Most sports organisations we surveyed say they intend to invest in data and analytics over the next 12 months. But they need to think carefully about where and how to deploy that investment to ensure it delivers early value and gains traction.

Sports organisations must have strategies in place to address the common challenges of:

- Siloed data
- Poor data access
- Data quality concerns
- Lack of resources and capability
- Poor data culture

And these strategies should provide:

- Appropriate structures with clear accountabilities
- The right mix of in-house and external expertise
- An appropriate approach to technology (don't buy a Ferrari when a Camry will do the job)
- Productive collaboration across national and state bodies and clubs

Don't invest in data for data's sake. And don't assume buying a new piece of technology will instantly solve your data problems. Organisations must ask what are the key business decisions that need to be made over the short, medium and longer terms, and how can data support these decisions?

Use the data and technology you already have to identify some quick wins. There will be some simple analyses or fresh visualisations that can "democratise" data across the business. These will start putting data into the hands of those who can benefit from it.



Think about how the data that your organisation captures (or could capture) will be collected, stored, managed, and used to inform critical business decisions. Address the important step of data engineering. This means cleansing, structuring, and connecting disparate data sets to unlock opportunities for visualisation and analysis. From here, bring data and analysis into business planning and decision-making processes at all business levels.

Don't let endless potential create inertia. For some organisations, a priority might be membership growth and churn reduction; for others it could be optimising schedules and fixtures or leveraging an improved understanding of audiences into new commercial partner opportunities.

Key to early success is focusing on a smaller number of high-value business priorities and how improved use of data and analytics can support them. Bridging the gap between intent and execution on data won't happen in one leap. But when data investment benefits start to accrue, the case for further investment becomes easier. When this happens, the industry will move beyond the era of talking about data, and into a new era of data-driven decision making that drives new levels of fan engagement and commercial growth.

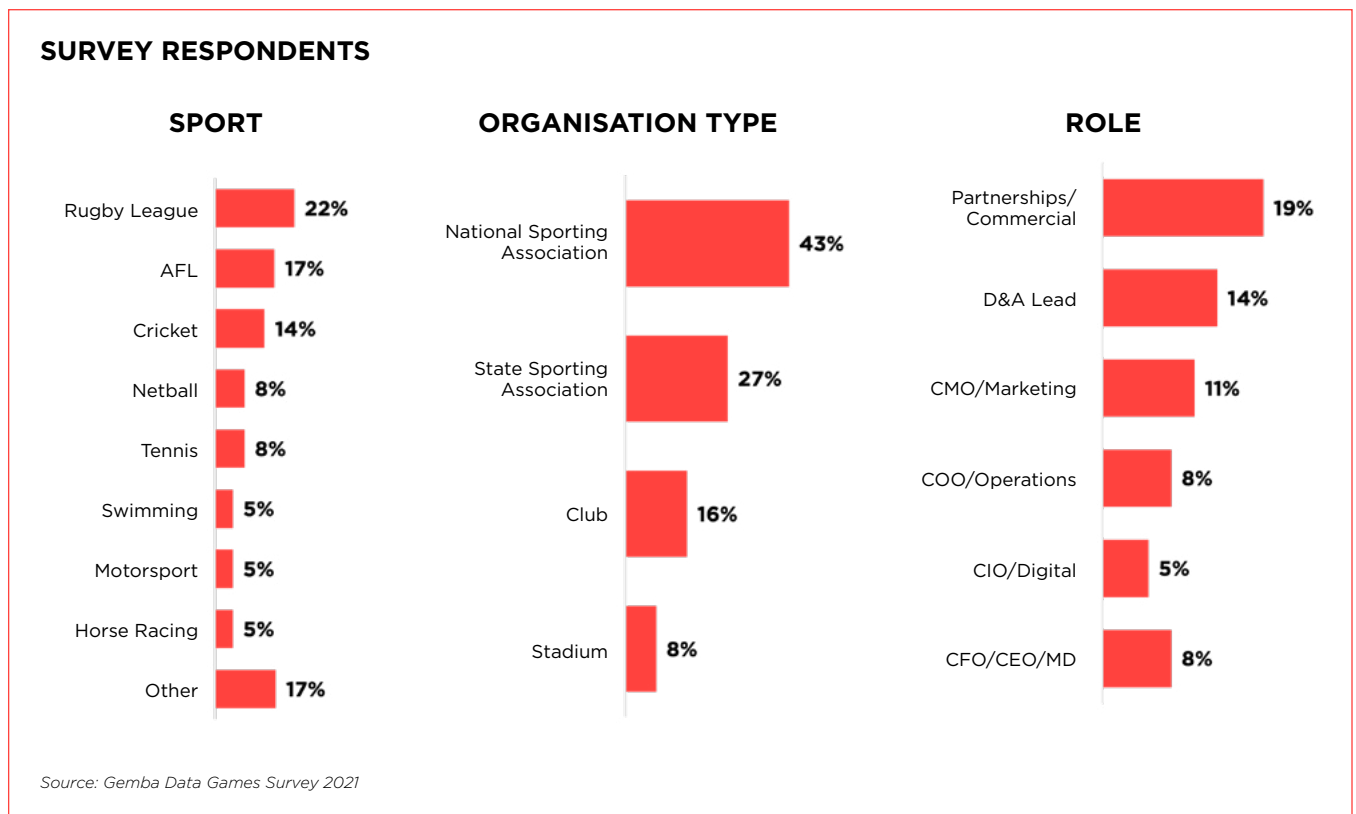
ABOUT THE RESEARCH

Gemba conducted this online survey of Australian sports executives in July 2021.

Around 50 respondents participated from sports including Rugby League, Rugby Union, Australian Rules Football, Cricket, Netball, Tennis, Swimming, Horse Racing, Golf, Motorsports, Gymnastics and Athletics; and across a mix of national governing bodies and leagues, state bodies, clubs, and stadiums.

We sought the opinions of industry leaders. As well as CEOs, respondents were drawn from senior executives across commercial, marketing, operations, digital, and finance.

Individual responses are anonymised to encourage an honest representation of the Australian sports industry’s perceptions, challenges and aspirations around data and analytics. Respondents were incentivised to participate via early access to consolidated results of the work, and the chance to win one of five \$100 gift cards.



ABOUT GEMBA

Gemba provides insights, strategy and communication services to the sport and entertainment industry. With offices in Sydney, Melbourne and London, Gemba's clients include Formula 1, World Rugby, City Football Group, Australian Football League, Cricket Australia, Melbourne Cricket Club, adidas, Coca-Cola, McDonald's and Toyota. Gemba manages a global insights program across 30 markets that measures how consumers engage with sport and entertainment.

Gemba is part of the [Tenka Group](#), a group of companies and a team of passionate professionals focussed on igniting new opportunities within the sport and entertainment industry.

Gemba Data & Analytics: Specialising in insights, data, analytics and strategy for the sports and entertainment sector, Gemba's Data & Analytics team works with leading sports and entertainment organisations.

Our Data & Analytics Product Suite encompasses:

- **Data Ignition:** Baselining organisations' data strategy and identifying gaps and opportunities, including: business requirements; data architecture; readiness assessment; and data strategy development.
- **Data Acceleration:** Embedded expertise to upskill teams and unlock the value in data, including: data quality management; strategic KPI reporting; data visualisation; data governance; training and capabilities; addressing pain points; unlocking data opportunities; and exploring new data platforms and solutions.
- **Data Services:** Ongoing management and delivery of data strategy, including: data integrations across a range of third-party and first-party sources; reporting and visualisation; audience/attendance predictive modelling; fan segmentation; member optimisation (acquisition and retention); ticket and membership pricing optimisation; schedule optimisation; commercialisation; media; and digital marketing and CRM.

Gemba is a certified [Ticketmaster Nexus Partner](#).

GEMBA'S DATA & ANALYTICS SERVICE SUITE

DATA STRATEGY



FANS

In depth analysis and insights to improve fan engagement



MEMBERS

Accelerate the move to personalisation and identify new prospects



MEDIA

Understand media consumption behaviour to inform content distribution



MARKETING

Data driven marketing and performance analysis



ATTENDANCE & TICKETING

Predict attendance and drive ticket sales



PARTICIPATION & SCHEDULING

Use advanced analytics to understand your participants and optimise schedules



HIGH PERFORMANCE

Improve on-field performance through advanced analytics

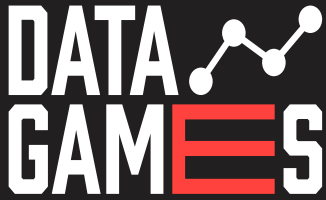


COMMERCIAL

Harness data science to identify commercial revenue opportunities

#GoingtoGemba events are deep-dives into emerging and powerful issues shaping the future of the sports and entertainment sector where we share insights and best practices with the industry. Previous Going to Gemba topics include: the implications of the COVID-19 shutdown on sport and entertainment, environmental sustainability in the sports industry, the influence of the new broadcasters on media rights, the emergence of esports as an entertainment and commercial force, the rise of the movie franchise, and how to ensure long-term legacy benefits from major events.

Find out more about these past events at thegembagroup.com/news/going-to-gemba-events



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