

BLOG REPORT

The Emperor's New Data: The Digital Challenge Facing Football



TIAKI

A Wake-Up Call for C-Suite and Board Leadership

The roar of the crowd, the thrill of the broadcast, the allure of global sponsorships – these have long been the pillars of revenue for Europe's elite football clubs. This legacy has built empires and captivated billions. However, in the rapidly evolving digital landscape, clinging solely to these traditional revenue streams is akin to navigating a hyper-speed digital highway in a horse-drawn carriage.

A fundamental shift in investment priorities, embracing data, artificial intelligence (AI), and robust cybersecurity, coupled with the necessary new talent appointments, is no longer optional – it is an existential imperative to redefine the future revenue portfolio mix.

Failure to act decisively, within the next 18 months, risks relegating iconic football club institutions to the status of pre-digital laggards, forever having "missed the boat" in the crowded, AI-powered digital sports era.

The Illusion of Digital Dominance: Social Media Followers vs. Tangible Digital Revenue

The Siren Song of Social Media:

The sheer scale of the global fanbase for the Top 20 European football clubs – an estimated 2.4 billion followers represents a massive potential opportunity, yet the challenge lies in effectively monetizing this reach.

The Chasm of Monetisation:

The stark reality is that the vast majority of these clubs are failing spectacularly to translate this immense social media footprint into meaningful, scalable digital revenue streams. The crucial metric of converting 'social media followers' to 'first-party data, monetisable assets', generating high quality engagement insights and recurring digital revenues – remains woefully low, often below 1%.

This is despite the global football market being valued at USD 33.56 billion in 2024 and projected to grow to USD 50 billion by 2035.¹

The "SME" Paradox:

European football clubs, despite their massive scale and global influence, often operate with the mindset and infrastructure of small-to-medium-sized enterprises (SMEs). They 'punch well above their weight' in terms of media presence in our daily lives, with sports feeds dominating broadcast schedules and online platforms continuously. This high profile visibility, however, has created a culture of complacency, perhaps even a "fools gold" mentality, where superficial digital follower numbers are mistaken for genuine success.

Private Sector Radically Different Context:

Contrast this with the retail - travel - banking - media & entertainment industries, where the benchmark for converting social media followers to first-party data for personalized marketing ranges from 2% to 18% versus European elite football clubs who are generally below 1%.

Other consumer facing industries understand that personalized experiences drive sales, and they invest heavily in the data strategy, the technology platforms and the data operating models to achieve this. Their survival depends on it.

¹ [Football Market Size, Share and Growth Analysis, 2035](#)

The Power of Data-driven Personalization

Consumer facing global giants leverage their first-party data, enriched with second and third-party sources and increasingly, vast quantities of synthetic data, to craft highly personalized outbound digital marketing campaigns. These campaigns drive significant revenue growth, enhance customer loyalty, and provide invaluable insights into consumer behavior. Data is the lifeblood for the B2C business, yet it is not yet recognised as pivotal to future digital revenue streams in football. Consequently the appropriate operating models are not yet in place.

In the private sector, 50% of organisations now have access to and leverage synthetic data to drive their competitive advantage.² The global synthetic data generation market is expected to reach USD 3.79 billion by 2032, growing at a CAGR of 33.05% from 2024 ³, indicating a significant investment in this area by other industries.

Sadly, in most cases, this is not yet on the radar of the digital teams at the football clubs. The data maturity gap between the leading Private Sector B2C brands and European Football Clubs continues to become an enormous chasm which is not shrinking.

The "Too Techy and Boring" Barrier:

Alarmingly, within many football clubs, discussions around data-driven strategies and AI-powered personalization are often dismissed as "too techy and boring". This ingrained resistance, born out of a lack of understanding and a comfort zone firmly rooted in traditional legacy football operations, is a critical impediment to progress.

The Leadership Void - Lacking Vision and Missing Digital Expertise

Some key summary quotes from a recent cross-industry report of 1,800 generative AI enterprise projects (not in football):

- **97%** of companies consider generative AI a "game-changing" technology meriting long-term investment.
- **48%** of 2,000 CXOs surveyed report their organizations still lack sufficient high-quality data to operationalize their generative AI initiatives.
- **75%** of executives identify "good quality data" as the most valuable asset for enhancing their generative AI capabilities, both currently and in the near term.

This deep level of generative AI discussion, combined with compelling vision and hunger to address the ongoing challenges, is now commonplace in private sector C-suites and boardrooms. It is not yet 'mainstream' in the majority of top football clubs! Unless it is addressed, the elite football clubs will fall into pre-digital darkness as irrelevant, ineffective laggards in the new AI-powered, post digital world. Fans, sponsors and investors will move on to bigger and better sports alternatives.

The Absence of Key Digital Roles

A fundamental indicator of the lack of digital prioritization is the limited number of Premier League clubs that have established dedicated C-suite roles for critical functions such as Chief Data Officer (CDO), Chief

² [Data readiness in the age of generative AI | Accenture](#)

³ [Synthetic Data Generation Market Surpasses USD 3.79 By 2032](#)

Digital Officer (CDO – note the distinction from Data), Chief Information Security Officer (CISO), and Chief AI Leader. There is no excuse. Most of these roles should have been in place 10 years ago, but the easy ‘broadcasting’ revenue that kept rolling in meant that football clubs could ignore the necessity to invest long term in digital, data and cybersecurity capability.

Reporting Structures and Empowerment:

Even where these roles nominally exist, they often lack the necessary authority, budget and empowerment, frequently reporting to operational departments rather than directly to the C-suite and the Board. This structural marginalization prevents digital strategy from being integrated into core business decisions.

We’ve seen this narrative play out in the private sector in the last decade. It got corrected and now enterprises are scaling generative AI and data value creation. It’s incredibly frustrating to see elite football clubs make the same mistakes in 2025.

Boardroom Blind Spots:

The composition of many Premier League club boards further exacerbates this issue. A significant number of board members lack the deep understanding and comfort level required to engage in informed discussions about data-driven revenue streams, AI-augmented business models, ecosystem partnerships and the escalating cybersecurity threats. This boardroom blind spot hinders the strategic prioritization and investment needed to thrive in the digital age.

Lack of Digital Investment:

While the global football market is substantial, many clubs are not investing adequately in the digital infrastructure and talent needed for long-term growth. The sports industry, in general, often faces resource constraints in IT and cybersecurity, with many organizations lacking dedicated CISOs.⁴

The Looming Threats: Data Governance and AI-Powered Cyberattacks

Navigating the Data Minefield:

The increasing scrutiny of data privacy and regulatory compliance, such as GDPR and evolving AI regulations, presents a significant challenge for football clubs. How many key senior leaders truly possess a deep understanding of the obligations and risks associated with managing vast amounts of digital fan data and increasingly sophisticated player performance data?

Do we have to wait for a crippling ransomware cyberattack for the CEO to realise that the cybersecurity operating model is not a reactive, compliance led, ‘tick in’ the box cost burden, but a strategic enabler to the business?

Hindsight is a wonderful thing. “If only I’d known the disruption this ransomware attack could cause.” We’ve heard this from CEOs and Executive Teams much too frequently in the private sector. It doesn’t have to be this way for football, but an urgent wake up call and accountability is needed on the AI-powered cyber threats imminently impacting football operations and the ticketing supply chain. There are no excuses.

The AI Copyright Conundrum:

A potentially explosive issue on the horizon is AI copyright infringement related to the likeness and

⁴ [cyber-threats-in-sport-overview_final.pdf](#)

performance data of leading football stars. As AI tools become more sophisticated in generating content, clubs and players face significant legal and commercial risks if unauthorized use of their image and data occurs. At many football clubs, this may not yet be on their risk radar.

The Existential Cybersecurity Risk:

The recent high-profile ransomware attacks targeting major UK retailers like Co-op, Harrods, and M&S in April'25, serve as a chilling warning to the football industry. Sports organizations are increasingly becoming targets for cyberattacks, with 70% experiencing at least one attack per year, significantly higher than the average across UK businesses.⁵



In our separate Blog Report, [Scaling Immersive Fan Experience Revenues in the Premier League - TIAKI](#) , we highlight the recent ransomware attacks on UK retailers like M&S and Co-op, attributed to groups like Scattered Spider and DragonForce, showcase a significant and escalating cyber threat landscape.

These incidents caused substantial disruption, including online service shutdowns, payment issues, and potential data breaches, leading to considerable financial and reputational damage.

The tactics employed, such as social engineering for credential theft and lateral movement within networks, serve as a stark warning to other sectors, such as sport.

This situation should be viewed as a critical "canary in a coalmine" moment, indicating that the sports industry, with its valuable data and high-profile events, is equally vulnerable to such sophisticated attacks. Proactive and robust cybersecurity measures are now paramount for sports organizations to protect their operations, fan data, and overall integrity against these evolving threats.

The Vulnerable Underbelly:

Similarly, the scenario of leakage of a Premier League club's player performance data during a transfer window could trigger immediate chaos, disrupting multi-million-pound deals and wreaking havoc on betting markets. The "soft underbelly" of immature cybersecurity measures within many football clubs presents an enticing target for increasingly sophisticated AI-enabled cybercriminals.

⁵ [Cyber-threat-to-sports-organisations.pdf](#)

Major sporting events are particularly vulnerable:

- On Super Bowl Sunday, DNSFilter saw a 57% increase in malicious gambling content compared to the rest of the NFL postseason.
- The 2024 Super Bowl saw a 15% rise in illegal streaming traffic.
- March Madness also saw a 552% spike in basketball-related scams.⁶

Financial Impact of Cyber Attacks:

A data breach can have a devastating financial impact. The average cost of a data breach in 2024 was estimated at \$6.1 million (cross-sector average), and this cost is rising annually. For a large football club, a major attack could potentially wipe out significant revenue, destroy fan and player trust, erode brand value and cause ecosystem partners & investors to disengage.

The "Emperor Has No Clothes" Moment: Digital Vanity vs. Tangible Results

The Empty Boast of Digital Supremacy:

The disconnect between the recent, self-proclaimed digital prowess of some leading football clubs, often amplified through their self-gratifying social media posts, "the best ever digital team", versus the stark reality of their digital immaturity and lack of revenue generation, should be deeply concerning to owners and investors.

Zero Scalable Digital Revenue:

The truth is that despite the vast social media following, many of these clubs generate negligible scalable digital revenues beyond traditional merchandise sales and basic website sponsorship advertising. To put this in simple context, this is how global retailers acted 20 years ago!

The lack of sophisticated data utilization and personalized fan engagement strategies result in huge potential revenue streams remaining untapped. Consequently, the revenue mix of leading European football clubs remains stuck in the past and disconnected from the post-digital, AI-augmented world of 2025.

More worryingly, the clubs are not meeting the digital immersive, hyper-personalisation expectations of their Gen Z and Alpha fans, who enjoy seamless experiences in their daily routines in other digital forums outside of sport. In the digital entertainment business of global sport, fan loyalty will become more and more transient. It's highly complacent to expect digitally-native football fans to tolerate such a 'low bar' of offerings and service indefinitely.

The 2025 Reality Void of Limited First-Party Data:

The failure to build substantial first-party data assets further underscores the superficiality of the clubs' digital strategies. Without this foundational data, personalized marketing, targeted content delivery, and the development of innovative, scalable digital products and services remain fictional pipe dreams.

In the B2C private sector, 78% of businesses consider first-party data their most valuable asset for personalization.⁷

⁶ [Secure Content Technologies](#)

⁷ [The rise of first- and zero-party data | Contentful](#)

Consider this question: what % of top European football clubs are currently 'customer-obsessed' and put their digital global fans' needs front and center of their business model? We assess the answer to be close to 0%!

Complacent Ignorance: A Recipe for Disaster:

This "Emperor has no clothes" moment is fueled by a dangerous mix of complacency, comfort zone and digital immaturity within key decision-making circles. A lack of understanding of modern digital business models and a reluctance to embrace change are creating a significant competitive disadvantage.

The Urgency for Radical Transformation

Stagnant Legacy Revenues and Mounting Debt:

Without a radical embrace of the AI-powered digital world, football clubs face a future of stagnant legacy revenues, increasing operational costs, and potentially unsustainable levels of debt as they struggle to compete with digitally savvy organizations.

The risk of being marginalised to "pre-digital laggards" within the next 18 months is real. The pace of digital differentiation across industries, fueled by Agentic AI, is accelerating, and those who fail to adapt quickly will be left behind.

Charting a New Course: The Path to Digital Supremacy

Empowering New Digital Leadership:

The solution lies in bringing in empowered new leadership talent in digital, data, and AI. These individuals must possess the vision, expertise, and authority to make tough decisions and break free from the immature approaches of the past. They need a seat at the highest table and the full backing of the C-suite and the Board. Budget must be found to attract the top talent out of the private sector with the experience and bold confidence to push through the anticipated complacent inertia.

Bring in the Experts:

Get comfortable working with boutique leading consulting firms that specialise in data, AI & cybersecurity. Engage with them, value their expertise and mobilise to capture their lessons learned from the private sector. With the right partners and ecosystem, the experts can nurture and guide the in-house talent to accelerate confidently to market best practice. Sport does not need to 'reinvent the wheel'.

Boardroom Digital Fluency:

The composition of club boards must evolve to include members who are deeply knowledgeable, and at ease, talking the vocabulary and being held accountable to the strategic impact of data, AI, and cybersecurity on the club's business and operating models. It's no longer a delegated executive action. Their expertise will be crucial in guiding strategic investment and ensuring digital initiatives align with overall business objectives.

Strategic Investment in Core Digital Capabilities:

A significant and sustained increase in investment is required in critical areas such as data infrastructure, data strategy, AI platforms, cybersecurity defences, and the recruitment and retention of top-tier digital talent. This investment must be viewed not as an expense but as a fundamental business driver of future revenue growth and competitive advantage.

Embracing a Data-Driven Culture:

A cultural shift is necessary throughout the organization, fostering a data-driven mindset where decisions are informed by insights, experimentation is encouraged, and the value of digital engagement is fully understood and embraced at all levels. This will not be easy. In the private sector we have seen many firms fail in this step due to the leadership paying 'lip service' to the culture and organisation challenges involved. However, for the organisations that do persevere, the profitable rewards are ground-breaking.

Recognizing the New Reality - Football as a Global Digital Entertainment Industry:

The fundamental truth that must be acknowledged is that football is no longer just a sport; it is a global digital entertainment industry. Clubs that fail to adapt their business models and operational strategies to this reality will inevitably be left behind.

Conclusion:

The time for complacency is over. The digital revolution is not knocking on the door of European football; it has already kicked it down. The C-suite and board leadership of these iconic clubs face a critical juncture. They can either cling to the fading comfort of shrinking legacy revenues and risk a painful decline into digital irrelevance, or they can embrace the transformative power of data, AI, and cybersecurity, guided by visionary leadership and strategic investment. The next 18 months will be decisive. It is time to wake up, smell the digital coffee, and seize the immense opportunities that lie ahead. The future of Europe's footballing giants depends on it.

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

David's vision for TIAKI is to empower sports franchise CEOs, leadership teams, sports media 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.

