TECH SPORT KIT

SURVEY RESULTS AND ANALYSIS REPORT

European study on the digitalisation of the sport sector

D2.1 SURVEY RESULTS AND ANALYSIS REPORT

WORK PACKAGE 2

PARTNERS

EASE European Association of Sport Employers

eose EUROPEAN OBSERVATOIRE OF SPORT AND EMPLOYMENT

UNEFS

SPORT WERK

Arbetsgivar alliansen

READY

Sport Evolution Alliance

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ACRONYMS

Acronym	Definition
AI	Artificial intelligence
EACEA	European Education and Culture Executive Agency
EASE	European Association of Sport Employers
EOSE	European Observatoire of Sport and Employment
EU	European Union

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EXECUTIVE SUMMARY

655

RESPONSES FROM SPORT ORGANISATIONS

Across 40 countries

88.1%

AGREE THAT DIGITAL TECHNOLOGIES ARE BECOMING ESSENTIAL FOR EFFECTIVE MANAGEMENT OF SPORT ORGANISATIONS

73%

AGREE WITH SECTOR DIGITAL SKILLS GAP

Respondents agreeing that sport organisations lack the digital skills required

73%

INTERESTED IN DIGITAL TRAINING OR SUPPORT

Sport organisations interested in training provision

The findings from the TechSportKit survey of sport organisations show that digitalisation is already reshaping the work and activities of responding organisations across Europe. The survey provides a picture of how sport organisations use digital technologies, the benefits they are achieving, the obstacles they face and the support their workforces will need.

The analysis draws on **655 valid responses from organisations in 40 countries**, including 34 European countries, however over half of respondents were from France (n=173) or Sweden (n=171). The sample is weighted towards sport clubs, non-profit organisations, local and regional bodies, and volunteer-led organisations, making the findings particularly relevant to grassroots and community sport.

Use of digital tools and technologies is widespread, but progress is uneven

Respondents are clear about the growing importance of technology: **88.1%** strongly agree or agree that digital tools and technologies are becoming essential to the effective management and functioning of sport organisations, while **75.2%** strongly agree or agree that digitalisation will significantly transform how the sector operates. Two-thirds also see potential for artificial intelligence (AI) to improve the performance of sport organisations.

A strong foundation of technology use is already in place:

- Social media, cloud storage, membership and participant management systems, as well as collaboration platforms are widely used across the sport sector.
- AI is becoming part of organisational activity: **74.7%** of applicable respondents[1] use it to create marketing content and **63.1%** use AI or large language models for administration.

Administration, marketing and sport-services management are seen as the areas in which better use of technology could create the greatest additional value.

More advanced digitalisation remains concentrated among larger and more digitally mature sport organisations. **27.4%** of respondents self-assessed their organisation as above average or very advanced. Automation, predictive analytics, smart technologies and specialised digital systems appear to be much less widely adopted.

Benefits are real, but remain mainly operational

The clearest gains from digitalisation are improvements to existing processes. Respondents to the survey most frequently reported:

- time savings (**74.5%**)

[1] Active in the given area (e.g. marketing, administration) and for whom the tool was applicable

- greater operational efficiency (**54.7%**)
- improved communication (**50.8%**)
- better access to data and information (**44.5%**).

More transformational outcomes, such as new services, better decision-making, increased revenue or improved sporting performance, were reported less often as benefits of digital tool and technology use. Most organisations consider improved efficiency as primary benefits of digitalisation for their organisations.

Progress is constrained by interconnected barriers

The leading barriers were lack of finance (**43.9%**), insufficient digital skills among staff and volunteers (**42.9%**) and lack of time (**40.4%**). Organisations also reported difficulty choosing appropriate tools, integrating systems and managing changes to established ways of working.

Among sport organisations making limited use of technology, lack of time to learn, limited organisational resources and low awareness of available tools were more influential than outright resistance to digitalisation.

Skills development is therefore essential, but training alone will not remove every barrier. Organisations also require practical guidance, help selecting suitable tools and implementation support that reflects their capacity.

The demand for skills and support is clear

Almost three-quarters of respondents (**73.0%**) believe that sport organisations lack the digital skills needed to benefit fully from digital tools and technologies, and **73.7%** agreed that the next generation of the sport workforce (paid staff and volunteers) will need strong digital capabilities.

At the same time, only **34.6%** were confident that staff and volunteers in their own organisation currently possess the necessary digital skills to perform their roles effectively.

Priority development areas include digital content creation (57.5%), the ability to learn and adopt new tools (50.5%), using AI effectively (44.9%), data management (43.9%) and analysis (34.2%) and cybersecurity (37.1%). Out of transversal skills, respondents also emphasised willingness to learn (52.2%), a digital mindset (48.9%) and change management (45.4%) as priority.

Current organisational provision to training remains limited: **57.0%** of responding organisations do not provide training or support in digital skills to their staff or volunteers. Provision was lowest among smaller, volunteer-led and less digitally mature organisations. Nevertheless, **68.0%** reported a need for additional training and **73.0%** expressed interest in future provision.

Respondents favoured online courses, flexible self-paced learning and short, intensive sessions. The findings support an **online-first, but not online-only**, approach combining modular learning with webinars, workshops, practical resources and optional workplace support.

Different training entry points might also be needed, from foundational support for organisations beginning their digital journey, through intermediate skill development to advanced pathways covering e.g. data, automation and AI.

Implications and conclusions

The findings indicate that the sector's next challenge is not simply to adopt more technology, but to use existing tools more purposefully and progress towards more advanced applications. Support should connect technology use to clear organisational and sporting objectives, while addressing practical barriers such as limited time, skills and capacity, tool selection, system integration and organisational change.

The remaining TechSportKit research should investigate how digitalisation is changing tasks, occupations and future workforce requirements. Roundtables, expert consultation and case studies should test and explain the

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survey findings, include underrepresented operational perspectives, and identify transferable examples of effective implementation, responsible AI use and wider organisational or sport-related benefits.

The digital skills inventory and competency framework should translate this evidence into competences relevant to different roles, functions and levels of responsibility. It should combine foundational capabilities—such as tool selection, digital content, data management, data protection and cybersecurity—with applied and advanced competences in analytics, automation, AI, system integration and specialised sport technologies. Transversal capacities, including critical thinking, adaptability, willingness to learn and change management, should also be embedded.

The training provision should be practical, modular and flexible, with different entry points for organisations at different levels of digital maturity. An online-first approach could combine self-paced courses with concise guides, practical examples, webinars, workshops and optional workplace support. Particular attention should be given to smaller, volunteer-led and less digitally mature organisations, which report the greatest gaps in current provision. As the survey sample is not statistically representative of the European sport sector, these priorities should be validated through the subsequent TechSportKit activities.

1. Introduction

TechSportKit is a 36-month Erasmus+ EU-funded sport project established to explore, better understand and support the digital transformation of the European sport sector. The project brings together a variety of stakeholders such as sport employer organisations, sport sector bodies, higher education institutions and organisations with expertise in technology, workforce development and digital learning.

The transnational project responds to the growing influence of digital tools, data and artificial intelligence on the management of sport organisations and the delivery of sport. It seeks to build a stronger evidence base on how these developments affect sport organisations and their workforce, identify the digital skills gaps and corresponding competencies required across different roles, and translate the findings into practical and fit-for-purpose training and support resources.

This report is Deliverable D2.1, entitled “Survey Results and Analysis Report”, produced within Work Package 2 and led by the European Observatoire of Sport and Employment (EOSE) alongside the research partners National University of Physical Education and Sports Bucharest (UNEFS) and Warsaw University of Technology (WUT), with the support and guidance of the project coordinator EASE as well as input from all the other project partners. It presents the main findings of the European Survey on Digitalisation in the Sport Sector carried out through the first phase of the work programme and forms the first major evidence-gathering output of the project.

1.1 Purpose of the survey

The European Survey on Digitalisation in the Sport Sector was developed to provide evidence directly from sport organisations about their current use of digital tools and technologies and the implications of digitalisation for their activities and workforce, including paid staff and volunteers.

For the purposes of the survey, digital tools and technologies were understood broadly as software or digital systems used to support organisational activities. This includes basic and widely used tools, such as email, spreadsheets and cloud storage, as well as specialised management systems, data analysis applications, automation and artificial intelligence tools.

The survey aimed to examine:

- how sport organisations perceive and use digital tools and technologies;
- the extent of digital integration across different areas of organisational activity;
- the factors encouraging or limiting digital adoption;
- the benefits and challenges experienced by organisations;
- digital skills gaps and priorities for skills development; and
- current and future needs for training, guidance and other forms of support.

1.2 Scope of the report

This report presents an analysis of the responses received through the survey. It begins by describing the profile of the responding organisations and the characteristics of the sample. It then examines their views on digitalisation, self-assessed level of digital maturity and their use of specific digital tools across areas including administration, internal communication, sport services, coaching, events, facility management, marketing, research and data analysis, and digital infrastructure and security.

Subsequent sections consider the factors influencing adoption, the benefits and challenges experienced, reasons for limited use, digital skills gaps, and training and support needs.

The findings reflect the experiences and perceptions of the sport organisations that participated in the survey. They should therefore be carefully interpreted as evidence from the survey sample rather than as statistically representative estimates for every sport organisation or country in Europe. Differences in the composition of the sample, including the countries, organisational types and organisation sizes represented, are considered when interpreting the results.

1.3 How the findings will be used

The survey findings will provide an evidence base for the next stages of the ambitious work programme of the TechSportKit project.

In particular, they will:

- contribute to the project's wider research on the sport labour market and its digital transition;
- inform Work Package 3, including the identification and mapping of digital skills required by sport employers and professionals and the development of the project's inventory of digital skills;
- guide Work Package 4 by helping to determine the subjects, levels and target groups for the project's training resources;
- inform decisions about appropriate training formats, delivery methods and schedules; and
- support the development of practical recommendations for sport organisations, training providers, sector bodies and policymakers.

2. Methodology

2.1 Survey design

The questionnaire was developed within the TechSportKit partnership, with the European Observatoire of Sport and Employment (EOSE) coordinating the survey process. The questionnaire was drafted and tested with the project partners. The questionnaire was structured around the following themes:

- profile and activities of the responding organisation;
- perceptions of digitalisation in the sport sector and within the organisation;
- current use of digital tools and technologies across different areas of organisational activity;
- factors influencing the adoption of digital technologies;
- benefits, challenges and barriers associated with digitalisation;
- digital skills gaps of the workforce and priorities for improvement;
- current and future training and support needs; and
- examples of good practice.

The survey mainly used closed-ended questions, including single-choice questions, multiple-response questions and five-point rating scales. Selected open-text questions allowed respondents to identify specific tools, describe training needs and provide examples or comments not covered by the predefined response options.

The questionnaire was designed to take approximately 12 minutes to complete. Responses were collected anonymously and were analysed and reported in aggregated form.

2.2 Target group and dissemination

The survey targeted organisations operating across the sport sector, with a particular focus on sport clubs. It was open to different types and sizes of organisations, including sport federations, governing bodies, fitness organisations, outdoor activity providers, sport facility operators and other organisations involved in the organisation or delivery of sport.

The intention was to capture experiences and views from sport organisations with different functions, workforce structures and levels of digital maturity. Both organisations employing paid staff and those relying partly or entirely on volunteers were included.

Dissemination was carried out by the TechSportKit project partners through their national and European networks. The main methods included:

- direct contact with organisations through existing professional networks;
- targeted email mailings;
- promotion through partner websites, newsletters and communication channels;
- contact with national and international sport federations, exploring the opportunity to circulate the survey among affiliated national federations and local sport clubs; and
- wider sharing through relevant sport sector networks and stakeholder groups.

The dissemination approach was open and network-based rather than based on a predefined probability sample. Its purpose was to be as inclusive as possible and obtain broad participation from a diverse range of sport organisations across Europe.

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2.3 Response period and survey languages

The survey was open from 11 May 2026 to 28 June 2026.

To improve accessibility, reduce language barriers and support participation across the partner countries, the questionnaire was made available in the eight languages of the consortium:

- English;
- Dutch (Belgium);
- French;
- Polish;
- Portuguese;
- Romanian;
- Spanish; and
- Swedish.

The English questionnaire served as the source version. Translated versions followed the same structure and response options to support consistent analysis across languages. Responses from all language versions were subsequently combined into a single dataset for cleaning and analysis.

2.4 Number of responses and data cleaning

A total of **686 complete and partial responses** were submitted to the survey. The dataset was reviewed before analysis to remove responses that did not contain sufficient usable information or were not considered valid.

The following responses were excluded:

- 26 responses that did not progress beyond the initial demographic questions;
- 4 duplicate responses submitted by the same person or organisation; and
- 1 response containing fake / unintelligible information.

In total, **31 responses were removed**, resulting in a final analytical dataset of **655 valid responses**.

2.5 Categorisation of 'Other' responses

Free-text responses submitted under "Other" options were reviewed to determine whether they corresponded to an existing response category. Where the meaning of a response clearly matched one of the predefined options, it was reassigned to that category. Responses that did not match an existing option were retained as "Other".

AI-assisted tools were used to support the translation and preliminary categorisation of responses submitted in different languages. All proposed classifications were subsequently reviewed and verified manually to ensure consistency and accuracy.

Across the questionnaire, 278 "Other" responses were reviewed. Of these, 135 were reassigned to an existing response category, while the remaining responses were retained as distinct "Other" answers.

2.6 Analysis conventions

Results from the survey are displayed as total or percentage (%) of unique respondents that responded to the question – multiple could represent the same organisation. Missing / skipped responses to a specific question

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were excluded from the totals. Where relevant, “N/A” (not applicable) responses were excluded from the calculated percentages. For cross-tabulation, a minimum subgroup size of n=10 was used. Open-text responses were coded and re-categorised or summarised using AI tools with a manual check.

3. Respondents' profile

This section presents the profile of the respondents' organisations as well as the respondents' characteristics if provided.

3.1 Countries represented

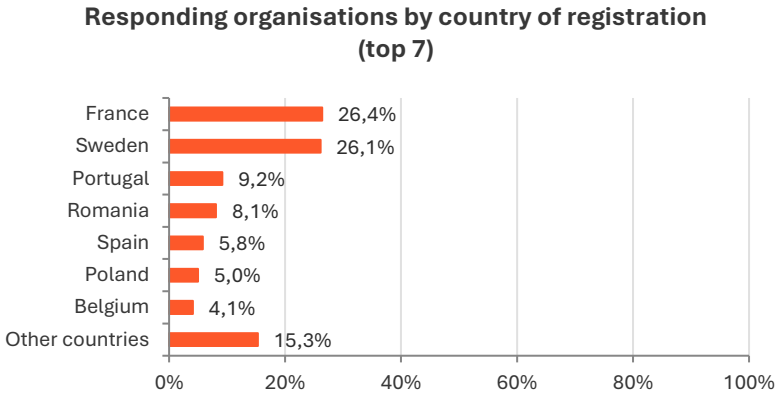

Figure 1. Survey question: "In which country is your organisation registered?" (n=655) – top 7 responses.

The survey gathered responses from 40 different countries (34 in Europe). Over half of respondents were from France (n=173) and Sweden (n=171), 32.2% from the remaining partner countries (Portugal, Romania, Spain, Poland, Belgium) and 15.3% from all other countries (n=100).

3.2 Types of sport organisations

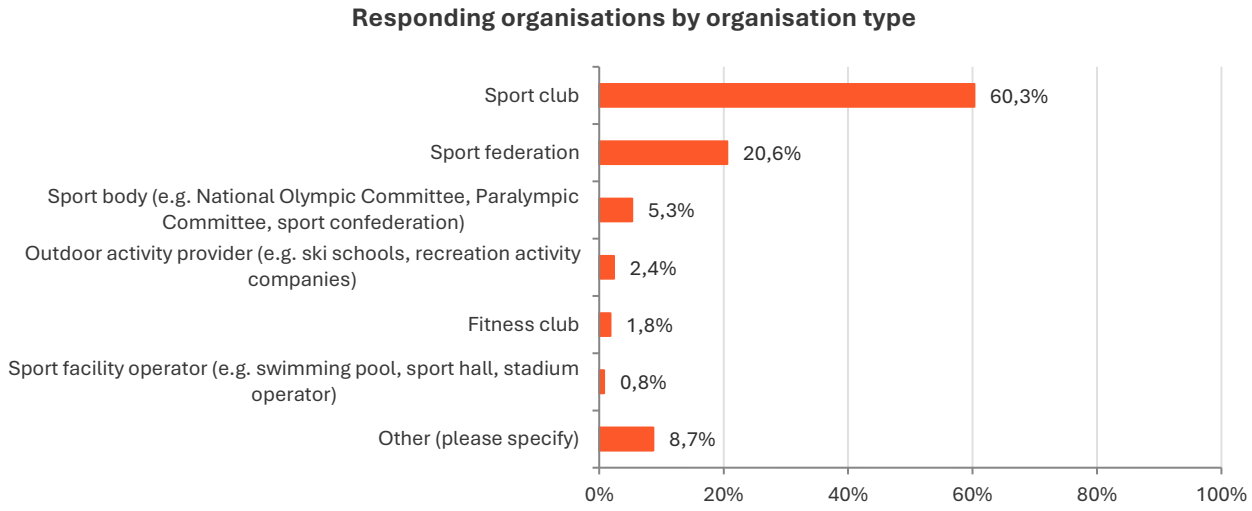

Figure 2. Survey question: "Please choose the option that best describes your organisation." (n=655).

Respondents were predominantly sport clubs (60.3%) and sport federations (20.6%) which were the main two targets of the survey.

'Other' responses (n=55) clustered mainly into public-sector/local government bodies (municipalities, city councils, local authorities, local sports partnerships) and higher education and research organisations

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(universities, sport science faculties, institutes and observatories). Other notable groups were NGOs, foundations and charities, employer/trade networks, sport-specific organisations (academies, leagues, sport institutes) and a smaller set of private/service providers and education/rehabilitation centres.

3.3 Sports covered

Sport federations, sport clubs, outdoor activity providers and sport facility operators were asked to indicate the sports that their organisations cover.

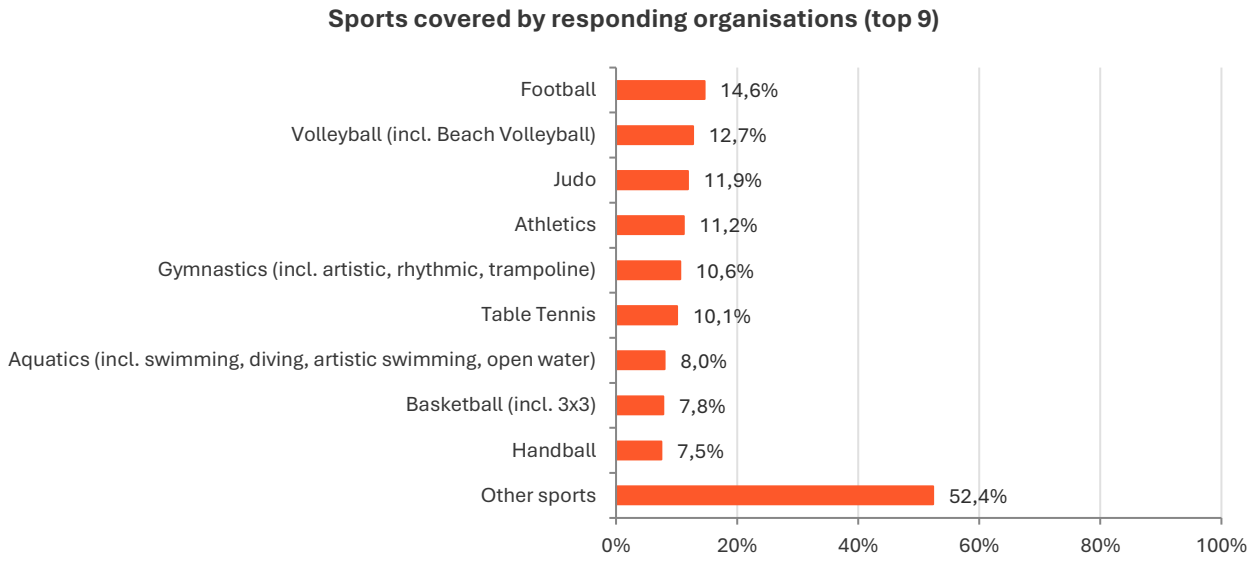

Figure 3. Survey question: "Which sport(s) does your organisation cover? Tick all that apply." (n=536).

There was a wide range of sports that the responding sport organisations cover – over 100 different sports in total - with football, volleyball and judo being most popular.

3.4 Organisational status

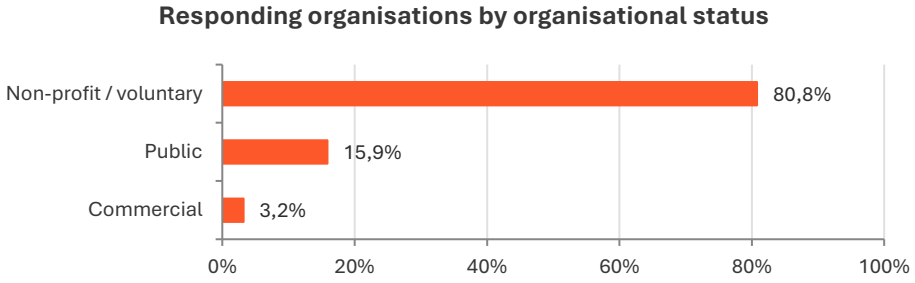

Figure 4. Survey question: "Which of the following best describes your organisation?" (n=647).

Over 80% of the respondents' organisations were non-profit / voluntary and only 3.2% were commercial.

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3.5 Geographical scope

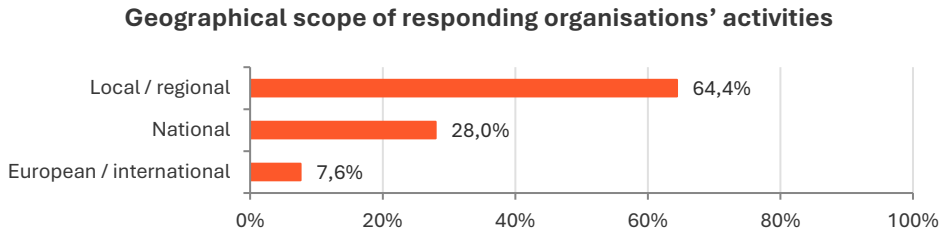

Figure 5. Survey question: "What is the main geographical scope of your organisation's activities?" (n=654). Note: Local and regional responses, and European and international responses, were combined for analysis.

Organisations that selected 'Local' or 'Regional' were grouped together, alongside separate 'National' and finally combined 'European' and 'International' groups.

Most of responding organisations which took part in the survey have a local / regional scope of activities (64.4%). Looking at responses from sport providers only (sport and fitness clubs, outdoor activity providers), over 80.1% operate locally.

3.6 Areas of focus

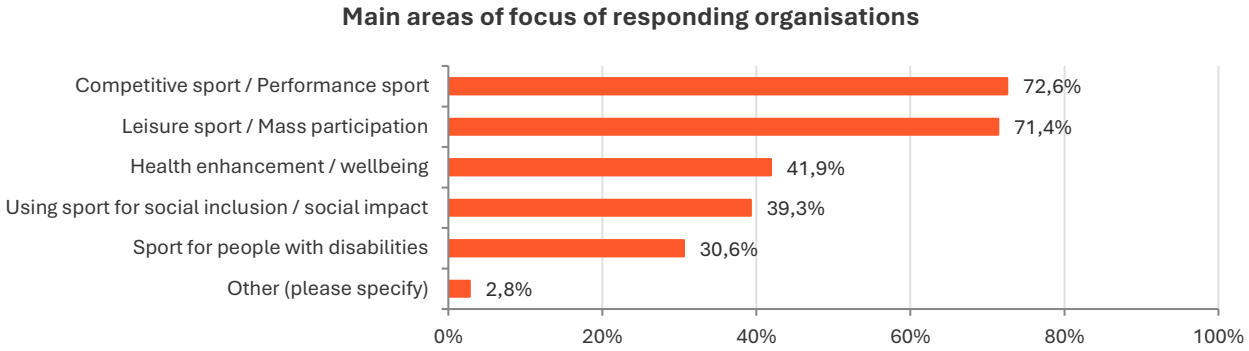

Figure 6. Survey question: "What is the main focus of your organisation? Tick all that apply." (n=654).

Most respondents focus on competitive / performance and leisure sport (over 70% each). Almost 40% use sport for social inclusion / social impact, and over 30% indicated that sport for people with disabilities is one of their main areas of focus.

3.7 Organisational size

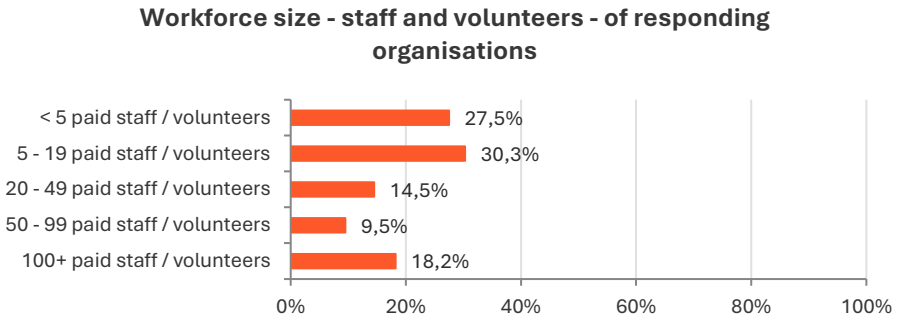

Figure 7. Survey question: "Approximately, can you please indicate the total size of your organisation's workforce?" (n=654). Note: Response categories were grouped for presentation; organisations reporting no staff are included in "< 5 paid staff/volunteers".

Sample included a range of organisation sizes, from less than 5 paid staff / volunteers (27.5%) to over 200 staff/volunteers (9.6%), with a majority (57.8%) of respondents having less than 20 paid staff/volunteers.

3.8 Staff profile

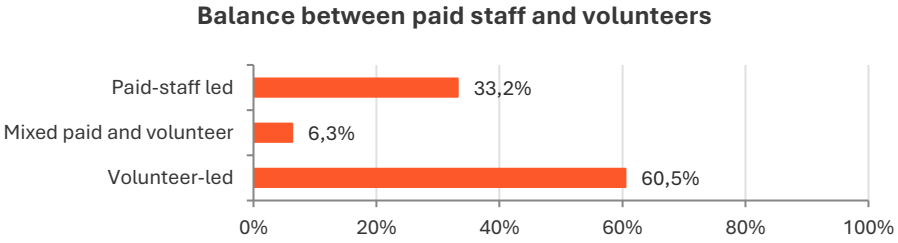

Figure 8. Survey question: "How would you describe the balance between paid staff and volunteers in your organisation?" (n=650). Note: Responses were grouped into paid-staff-led, mixed, and volunteer-led organisations.

Most organisations are volunteer-led (60.5%) – either fully led by volunteers (19.1%) or having more volunteers than paid staff (41.4%), which is even more the case for respondents from France (80.2% volunteer-led) and for sport clubs (69.6%). Respondents from Romania were much more likely to be paid staff led (81.1%) as well as those with an international scope of activities (63.3%, n=49).

3.9 Respondents' profile

The following graphs show the demographic characteristics of individuals who answered the set of optional demographic questions towards the end of the questionnaire (n=477; 72.8% of all respondents). It is important to remind that this survey was addressed to sport organisations, not individuals.

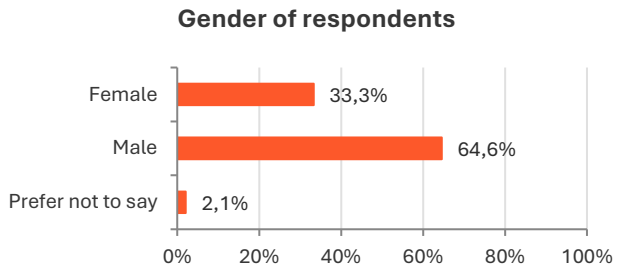

Figure 9. Survey question: "What is your gender?" (n=477).

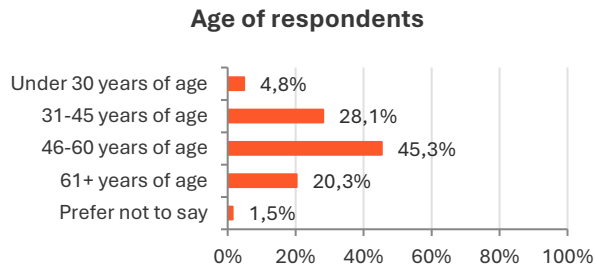

Figure 10. Survey question: "What is your age?" (n=477).

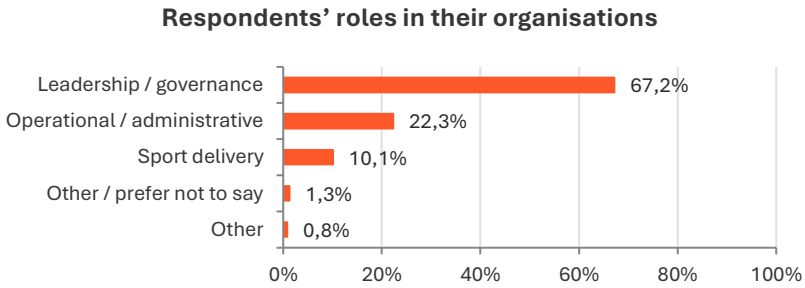

Figure 11. Survey question: "What is your role position in the organisation?" (n=476).

Out of those respondents, they were predominantly male (64.6%), over 45 years old (65.6%) and in leadership roles in the organisations (67.2%) which included:

- Senior management (e.g. director, CEO) - 39.9%
- Board member / leadership role- 27.5%

3.10 Summary of respondents' profile - implications for interpreting the results

The survey achieved a substantial and diverse sample of sport organisations. However, the findings should be interpreted in light of the composition of the responding group.

More than half of the responses came from France and Sweden. Aggregate results are therefore influenced by the organisational and national contexts of these two countries. Comparisons between countries are only made where the number of responses is sufficient, and results from countries with smaller samples should be treated with caution.

The sample is predominantly composed of sport clubs, non-profit organisations, organisations operating at local or regional level, and organisations relying mainly on volunteers. The findings are therefore particularly relevant to grassroots and community sport – the main target groups for the TechSportKit project – but may be less representative of commercial providers, facility operators, large employers, and organisations operating mainly at national or international level.

At the same time, the dataset includes organisations of different sizes, sports, geographical scopes and workforce structures. This diversity makes it possible to explore how digitalisation varies between different types of organisations. Where subgroup numbers are small, however, apparent differences should be interpreted as indicative rather than conclusive.

Respondent demographic information was optional and was provided by only part of the sample. Among those who provided it, respondents were predominantly male, aged over 45 and working in senior management or leadership positions. The results may therefore reflect the perspectives of organisational decision-makers more strongly than those of younger workers, coaches, administrative staff or volunteers carrying out day-to-day activities.

The survey used an open, network-based dissemination approach rather than a statistically representative sampling method. Participation was voluntary, meaning that organisations with a particular interest in digitalisation may have been more likely to respond. The findings should consequently be understood as evidence from a large and varied sample of European sport organisations, rather than as statistically representative estimates for the entire sport sector.

Finally, the results are based primarily on respondents' own assessments of their organisations. Measures such as digital maturity, skills levels and organisational readiness therefore reflect perceptions and reported practices rather than independently verified assessments.

4. Areas of activity of responding organisations

Respondents were asked to indicate which areas of activities are part of their organisations' regular operations. This was later used for filtering, to only show the respondents questions about areas that they are regularly active in.

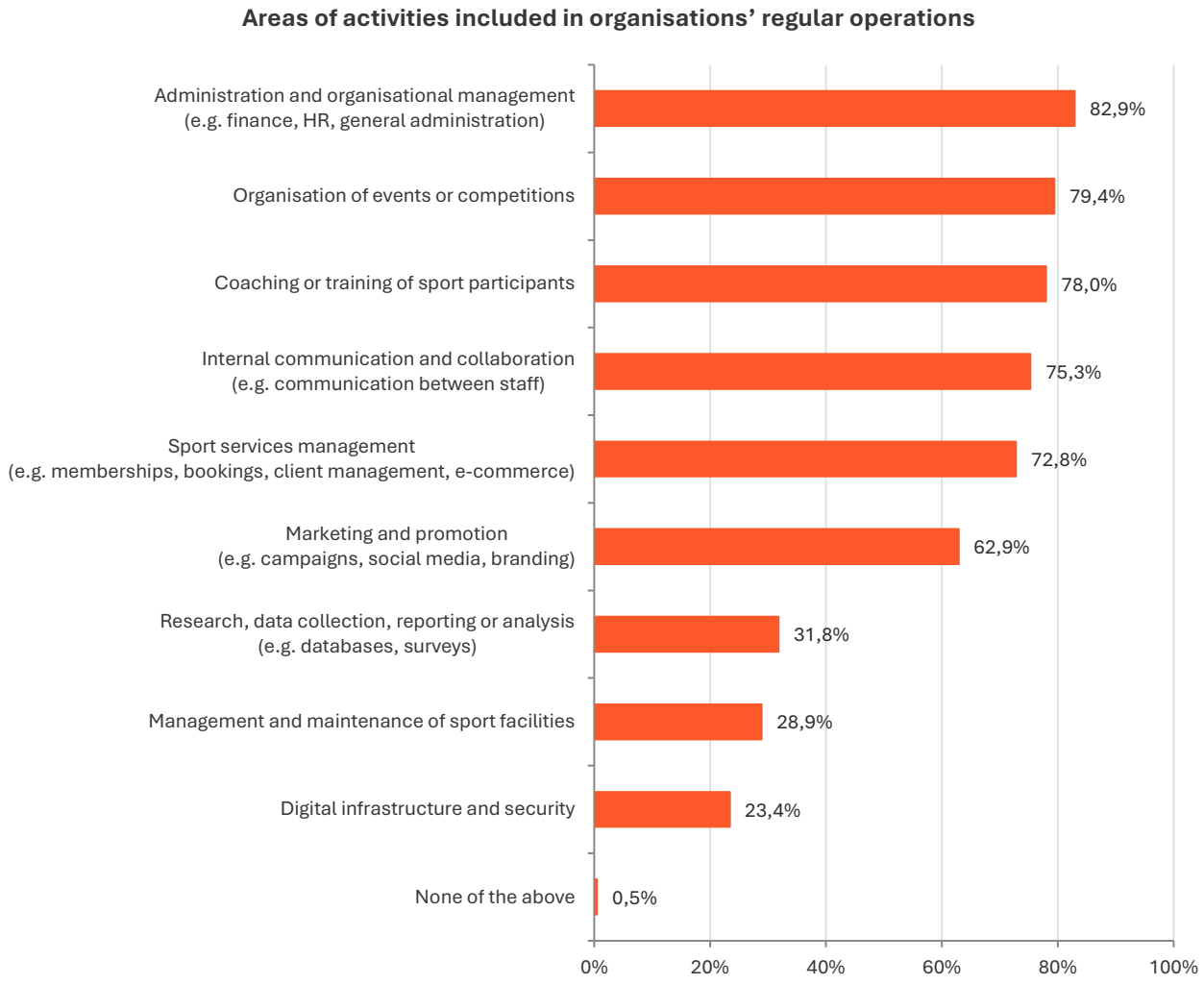

Figure 12. Survey question: "Which of the following activities are part of your organisation's regular operations? Select all that apply." (n=655).

Five areas of activity were each selected by more than 70% of respondents. Administration and organisational management was the most frequently reported area (82.9%), followed by the organisation of events or competitions (79.4%), coaching or training of sport participants (78.0%), internal communication and collaboration (75.3%), and sport services management (72.8%).

Some differences were observed between respondent groups:

Administration and organisational management was reported by 97.1% of respondents in Sweden and by 75.0% of organisations with fewer than five staff or volunteers.

Coaching or training of sport participants was reported by 90.9% of sport clubs.

Internal communication and collaboration was selected by 90.1% of respondents in Sweden. By organisational size, it was reported by 61.1% of organisations with fewer than five staff or volunteers and 87.4% of those with 100 or more.

The proportion reporting being active in *sport services management* ranged from 45.3% in Romania to 91.2% in Sweden.

Marketing and promotion was part of the regular operations of 62.9% of respondents. The proportion was 86.0% in Sweden and 49.1% in France. It was reported by 55.0% of organisations with fewer than five staff or volunteers and by 77.3% of large organisations.

Research, data collection, reporting or analysis was selected by 31.8% of respondents. This included 15.0% of respondents in France and 19.2% of sport clubs. This activity area was reported by 51.3% of organisations with 100 or more staff or volunteers and by more than half of organisations with a national or international geographical scope.

Management and maintenance of sport facilities was reported by 28.9% of respondents. The proportion was below 20% in Poland and Belgium, compared with 49.1% in Romania and 48.3% in Portugal.

Digital infrastructure and security was selected by 23.4% of respondents. The proportion ranged from 8.7% in France to 39.2% in Sweden and was 15.2% among sport clubs.

4.1 Note on Digital infrastructure and security

Whilst only 23.4% of respondents selected 'Digital infrastructure and security' as an area of active involvement, 61.8% of respondents agreed with the statement that data protection, cybersecurity and responsible use of digital technologies are important priorities in their organisations as seen in Figure 13:

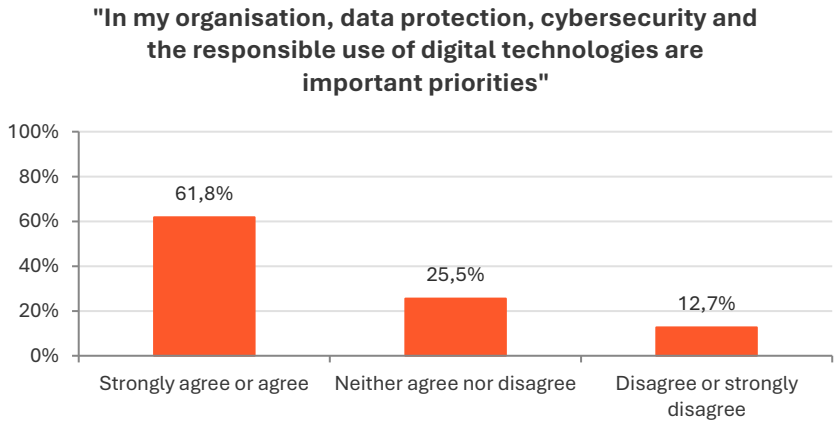

Figure 13. Survey statement: "In my organisation, data protection, cybersecurity and the responsible use of digital technologies are important priorities." (n=584).

5. Views on digitalisation

5.1 Digital tools becoming essential and transformative

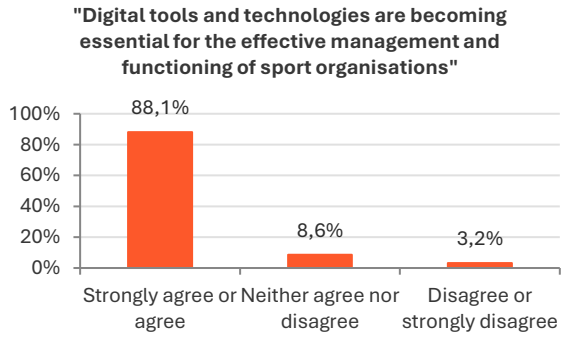

Figure 14. Survey statement: "Digital tools and technologies are becoming essential for the effective management and functioning of sport organisations." (n=616).

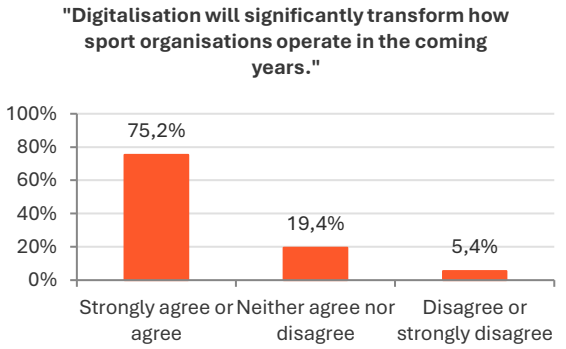

Figure 15. Survey statement: "Digitalisation will significantly transform how sport organisations operate in the coming years." (n=614).

88.1% of respondents agreed that digital tools and technologies are becoming essential for the effective management and functioning of sport organisations. 94% of large organisations of 100+ staff/volunteers (n=116) agreed, whereas 85.5% of small organisations (<5 staff/volunteers) did.

A clear majority of respondents also agreed that digitalisation will significantly transform how sport organisations operate in the coming years (75.2%).

5.2 Digitalisation as strategic priority

Despite the reported importance of digitalisation for functioning of sport organisations as well as its transformative effects, less than half of respondents report that their organisation's investment in digital tools, technologies and skills is becoming a strategic priority.

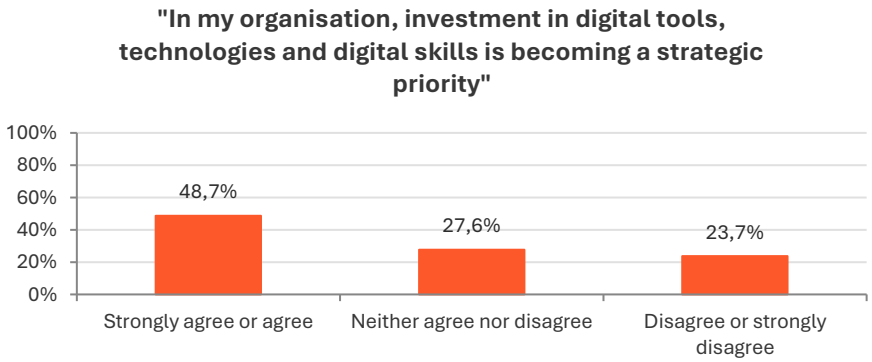

Figure 16. Survey statement: "In my organisation, investment in digital tools, technologies and digital skills is becoming a strategic priority." (n=583).

The difference is most striking within the organisations of less than 5 staff/volunteers (n=154) with only 36.4% of those organisations agreeing with the statement. Respondents from Poland (n=29) showed the lowest level of

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agreement with this statement (only 10.3%), whereas over 50% of respondents from Belgium, Portugal, Romania and Sweden agreed.

5.3 Views on AI

Respondents were asked to indicate their agreement with the statement "Artificial intelligence (AI) has the potential to improve how sport organisations operate".

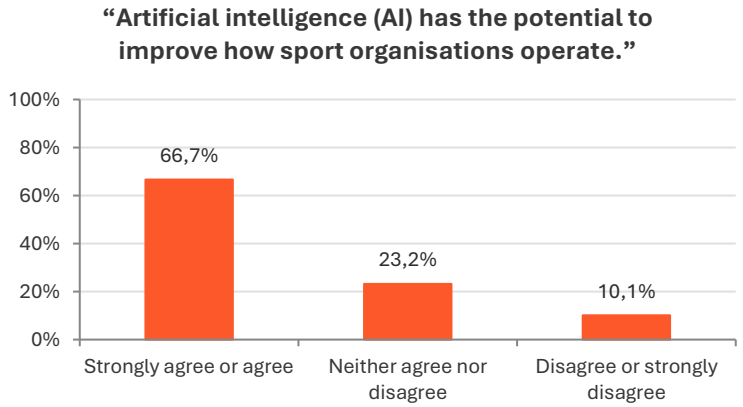

Figure 17. Survey statement: "Artificial intelligence (AI) has the potential to improve how sport organisations operate." (n=612).

66.7% of respondents agreed about the potential of AI to improve the operation of sport organisations (34.5% strongly agreed).

Analysed by country, the agreement rate ranged from 50.2% for respondents from France (n=161), up to 88.6% for Spanish respondents (n=35).

Sport bodies were much more likely to agree with the statement (87.5%, n=32) compared to sport clubs (59.2%, n=363), and so did the larger organisations – 78.4% of those with 100+ staff/volunteers compared to 58.3% of those with 5 or less.

6. Current levels of digital integration

In the survey, sport organisations were asked to self-assess their level of digitalisation compared to similar organisations. They were also shown statements relating to the overall digitalisation levels of the sector.

Respondents were also presented with a list of digital technologies and tools by area of activities, only in the areas that the respondents indicated their organisation was active in. For the analysis, the tools were manually classified as “basic”, “intermediate” and “advanced”. The full list of tools and their classification can be found in Annex *0*

List of tools by area with sophistication level.

Organisation's level of digitalisation should be reflected in both the number of tools used and their sophistication. A highly digitalised organisation would be expected to report using more tools more frequently.

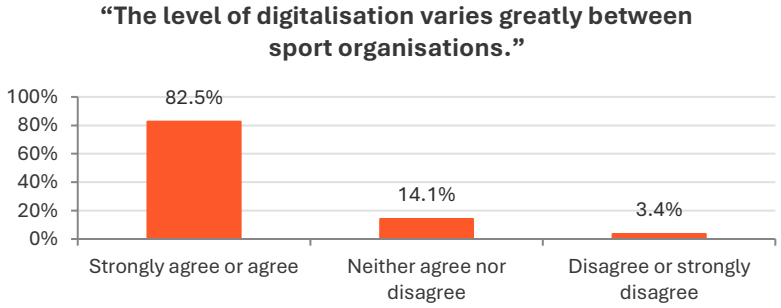

Figure 18. Survey statement: "The level of digitalisation varies greatly between sport organisations." (n=612).

82.5% of respondents agreed or strongly agreed that the level of digitalisation varies greatly between sport organisations.

6.1 Overall self-assessed digital maturity of responding organisations

When asked to self-assess their own organisation, respondents did show some level of variation:

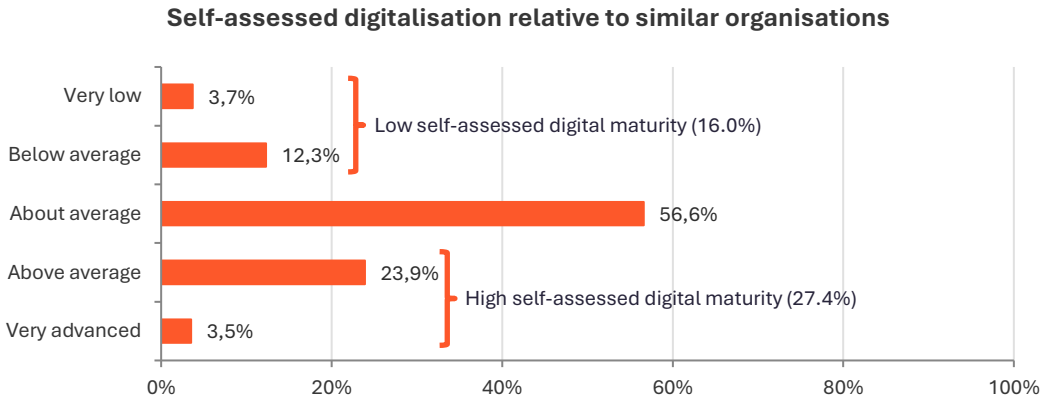

Figure 19. Survey question: "How would you describe your organisation's level of digitalisation compared to similar organisations in your sport or country?" (n=544).

Smaller organisations were more likely to self-describe their digital maturity as below average or lower (up to 24.3% respondents with <5 staff /volunteers), whereas this was much less prevalent across large organisations of 100+ staff (only 7.8%).

Compared to the overall sample, respondents from Spain were more likely to self-assess their organisations as below average or very low (35.5%), whereas those from Portugal as above average or very advanced (36.7%).

6.2 Perceived effect of age on digital technology use

Organisations reported that there might be some internal differences in the level of usage of tools and technologies, driven by the age of staff/volunteers:

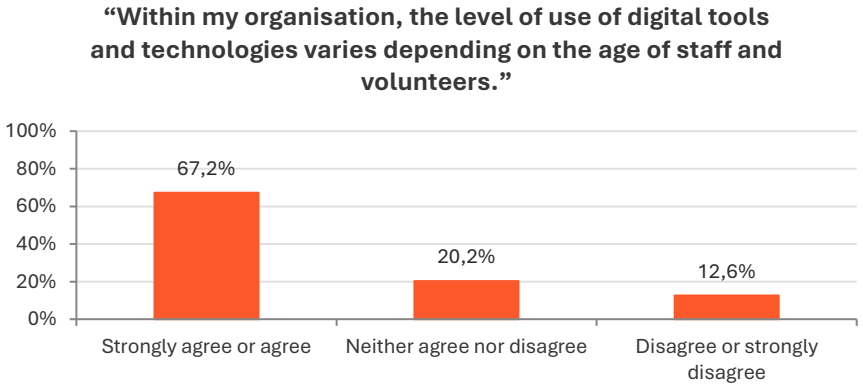

Figure 20. Survey statement: "Within my organisation, the level of use of digital tools and technologies varies depending on the age of staff and volunteers." (n=580).

Indeed, 67.2% of respondents agreed with this statement showing substantial support to the claim that age of staff/volunteers might be an impacting factor in organisations' digitalisation level of use.

6.3 Use of digital tools – methodological note

The following sections present the use of digital tools and technologies in the main operational areas covered by the survey. Respondents were only shown questions relating to areas in which their organisation reported being active in.

For each tool, the percentages are calculated among respondents who provided a substantive response, excluding those who selected "N/A to my organisation". The valid sample size therefore varies between tools and is shown beside each tool in the figures. Unless otherwise stated, "use" combines the responses "Used extensively" and "Used occasionally", while planned use is reported separately.

Subgroup findings are descriptive. Sample sizes are small for some countries, organisational types and other categories, particularly once N/A responses are excluded. The comparisons below therefore highlight notable patterns but should be interpreted as indicative rather than conclusive.

Note: For clarity, data labels for responses of less than 6% were omitted from the charts.

6.4 Use of digital tools for administration and organisational management

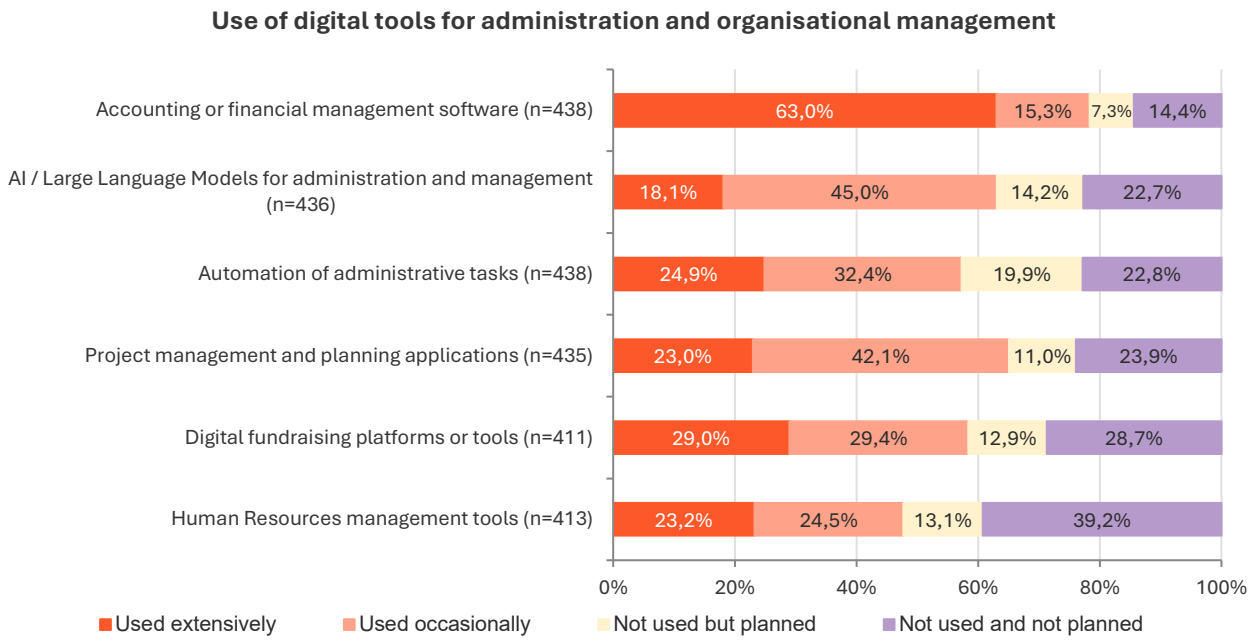

Figure 21. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Administration and organisational management." Note: Sample size varies by tool and is shown beside each tool in the chart.

Accounting or financial management software was the most established administrative technology, used by 78.3% of respondents for whom it was applicable (n=438), including 63.0% who used it extensively.

Project management and planning applications were used by 65.1% (n=435).

AI or Large Language Models were also already used by 63.1% (n=436), although this was more often occasional than extensive use.

Digital fundraising tools were used by 58.4% (n=411), automation of administrative tasks by 57.3% (n=438), and Human Resources management tools by 47.7% (n=413).

Administrative automation showed the strongest potential for further uptake: 19.9% were not currently using it but planned to do so. This would bring the combined share currently using or planning to use automation to 77.2%.

AI/LLMs followed a similar pattern, with 63.1% already using them (predominantly occasionally) and a further 14.2% planning to do so. These results suggest that automation and AI are moving beyond early adoption, although extensive use remains much less common than occasional use.

Adoption was uneven between different types of actors. Human Resources tools were used by 71.5% of paid-staff-led organisations (n=147), compared with 32.4% of volunteer-led organisations (n=241).

AI/LLM use for administration showed a wide spread:

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Respondent group	Used extensively	Used occasionally	Not used but planned	Not used and not planned
All respondents *(n=436)*	**18.1%**	**44.9%**	**14.2%**	**22.7%**
Agree / strongly agree that AI can improve sport organisations *(n=301)*	23.3%	49.2%	15.0%	12.6%
Disagree / strongly disagree that AI can improve sport organisations *(n=40)*	5.0%	32.5%	10.0%	52.5%
Sport club *(n=248)*	14.1%	37.1%	16.2%	32.6%
Sport federation *(n=102)*	23.5%	54.8%	13.8%	7.8%
France *(n=112)*	15.2%	36.7%	11.6%	36.7%

Table 1 – Survey item: "Using AI / Large Language Models for administration and management (e.g. ChatGPT, Claude, Gemini)" by selected respondent characteristics and attitudes. Note: Sample size varies by subgroup and is shown in the table.

AI usage was much higher among sport federations (78.4%, n=102) than among sport clubs (51.2%, n=248), and higher still for sport bodies (88%). Usage varied depending on the respondents agreement with the statement "AI has the potential to improve how sport organisations operate". Of those who disagreed, only 37.5% use AI, compared with 72.5% of those that agreed or strongly agreed.

6.5 Use of digital tools for internal communication and collaboration

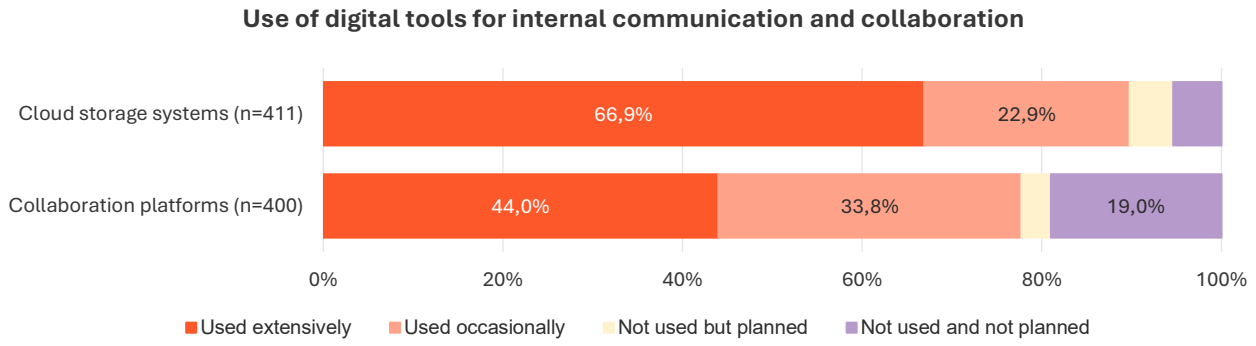

Figure 22. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Internal communication and collaboration." Note: Sample size varies by tool and is shown beside each tool in the chart.

Internal communication and collaboration was one of the most highly digitalised operational areas. Cloud storage systems were used by 89.8% of respondents for whom they were applicable (n=411), including 66.9% who used them extensively. Collaboration platforms such as Teams, Slack or Discord were used by 77.8% (n=400), with 44.0% reporting extensive use.

Planned uptake was relatively limited—4.9% for cloud storage and 3.3% for collaboration platforms—suggesting that these tools are already mature rather than emerging technologies for most applicable organisations.

Cloud storage use was consistently high across organisational types, sizes and workforce profiles. Differences were more visible for collaboration platforms: use ranged from 62.0% among organisations with low self-assessed digital maturity (n=58) to 92.2% among those with high digital maturity (n=115). This suggests that the

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main divide in this area concerns the breadth and intensity of collaborative working rather than access to basic cloud infrastructure.

6.6 Use of digital tools for marketing and promotion

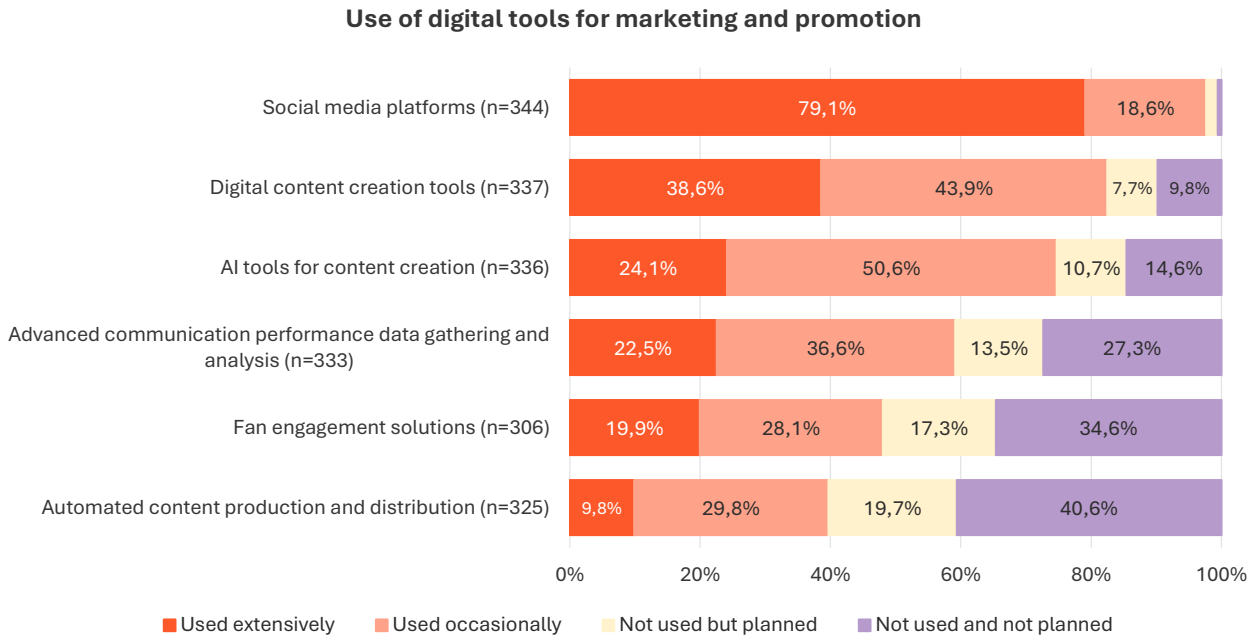

Figure 23. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Marketing and promotion." Note: Sample size varies by tool and is shown beside each tool in the chart.

Marketing and promotion was characterised by very widespread use of accessible, outward-facing technologies. Social media platforms were used by 97.7% of respondents for whom they were applicable (n=344), making them the most widely used tool covered by the survey; 79.1% used them extensively. Non-AI digital content creation tools were used by 82.5% (n=337), while 74.7% already used AI tools to generate text or images (n=336). The high use of AI content tools indicates that generative AI has already entered routine marketing activity in a substantial proportion of responding organisations.

More specialised technologies were less widely adopted. Advanced communication-performance data gathering and analysis was used by 59.2% (n=333), fan engagement solutions by 48.0% (n=306), and automated content production and distribution by 39.7% (n=325). However, these tools also showed some of the strongest indications of future uptake: 19.7% planned to adopt automated content production and 17.3% planned to adopt fan engagement solutions.

Social media use was consistently high across the main organisational subgroups, suggesting that it is now a near-universal foundation for digital engagement. Larger differences emerged for more specialised tools. Fan engagement solutions were used by 76.4% of organisations with 100 or more staff or volunteers (n=72), compared with 30.9% of those with 5–19 staff or volunteers (n=81). Advanced communication analytics showed a similar pattern, ranging from 47.5% among organisations with fewer than five staff or volunteers (n=80) to 78.1% among those with 100 or more (n=73). This points to a divide between widespread content production and the more resource-intensive use of data, personalisation and automation.

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6.7 Use of digital tools for sport services and participant management

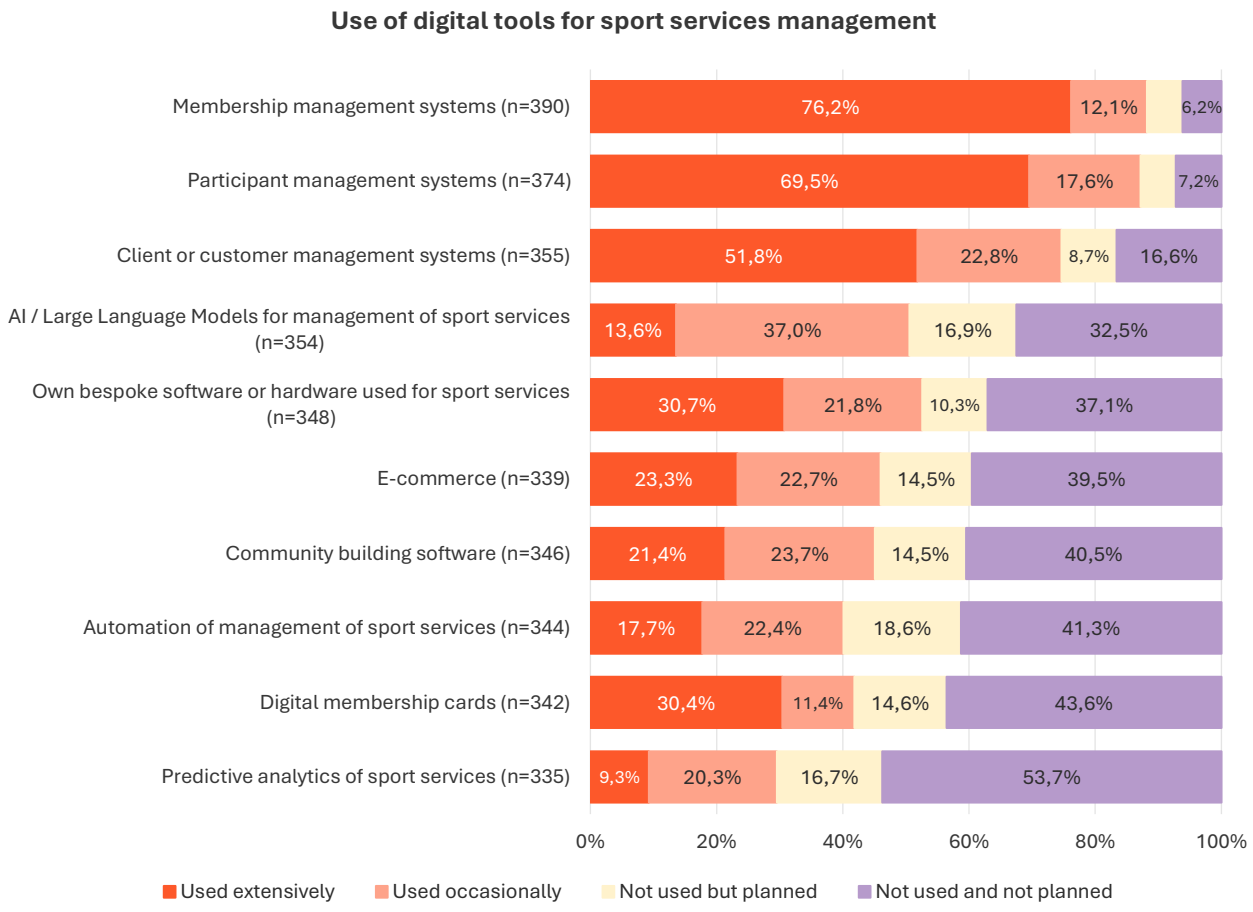

Figure 24. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Sport services management." Note: Sample size varies by tool and is shown beside each tool in the chart.

The most established sport-service technologies were systems supporting core membership and participant processes. Membership management systems were used by 88.2% of respondents for whom they were applicable (n=390), while participant management systems were used by 87.2% (n=374). Client or customer management systems, including booking and registration systems, were used by 74.6% (n=355). Extensive use was particularly common for membership and participant management, indicating that these tools are embedded in the day-to-day delivery of sport services.

Adoption was more mixed for specialised or advanced applications. Bespoke software or hardware was used by 52.6% (n=348), AI/LLMs for sport-service management by 50.6% (n=354), e-commerce by 46.0% (n=339), community-building software by 45.1% (n=346), digital membership cards by 41.8% (n=342), and service-management automation by 40.1% (n=344). Predictive analytics was least widely used, at 29.6% (n=335). Nevertheless, planned use was relatively high for automation (18.6%), AI/LLMs (16.9%) and predictive analytics (16.7%), suggesting that these applications may become more prominent.

The findings also illustrate the unequal depth of digitalisation. E-commerce was used by 72.6% of organisations with 100 or more staff or volunteers (n=73), compared with 29.4% of those with fewer than five (n=78). Service-management automation ranged from 21.1% among the smallest organisations (n=76) to 59.5% among the largest (n=74). Predictive analytics was used by 8.0% of organisations with low digital maturity (n=50), compared with 51.1% of those with high digital maturity (n=90). By contrast, differences were much smaller for the core membership and participant systems. This suggests that basic service digitalisation is widespread, while

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advanced, automated and data-driven service management remains concentrated among better-resourced and more digitally mature organisations.

6.8 Use of digital tools for events and competitions

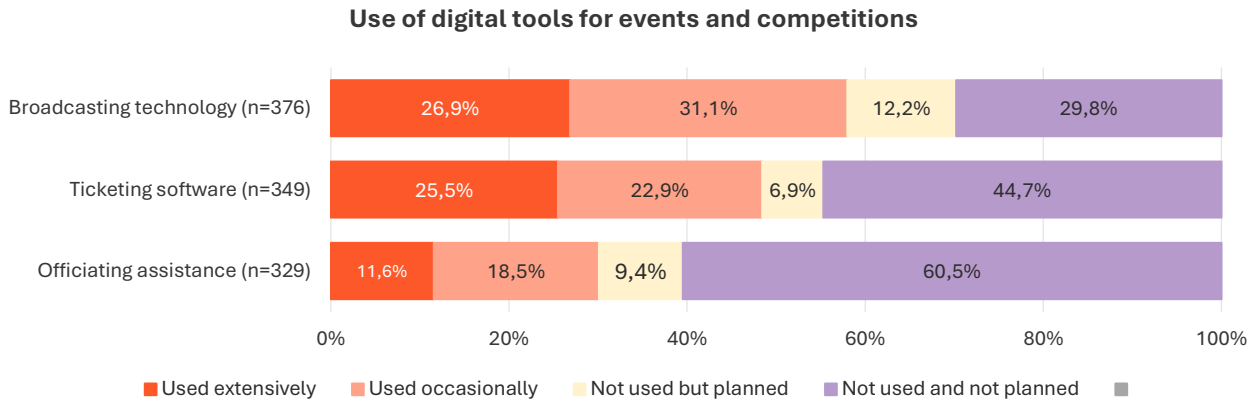

Figure 25. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Organisation of events or competitions." Note: Sample size varies by tool and is shown beside each tool in the chart.

Broadcasting technology was the most widely used digital technology for events and competitions, reported by 58.0% of respondents for whom it was applicable (n=376). Ticketing software was used by 48.4% (n=349), while officiating assistance such as video or VAR was used by 30.1% (n=329). Planned use was highest for broadcasting technology, at 12.2%, compared with 9.4% for officiating assistance and 6.9% for ticketing.

Use varied according to organisations' role, scale and geographical scope. Officiating assistance was used by 57.3% of sport federations (n=82), compared with 20.1% of sport clubs (n=213), and by 46.3% of national organisations (n=95), compared with 19.5% of local or regional organisations (n=206). Ticketing use ranged from 38.0% among organisations with fewer than five staff or volunteers (n=84) to 70.3% among those with 100 or more (n=64). These patterns are consistent with the greater relevance and affordability of specialised event technologies for larger organisations and actors responsible for organising competitions at a higher level.

6.9 Use of digital tools for coaching, training and performance

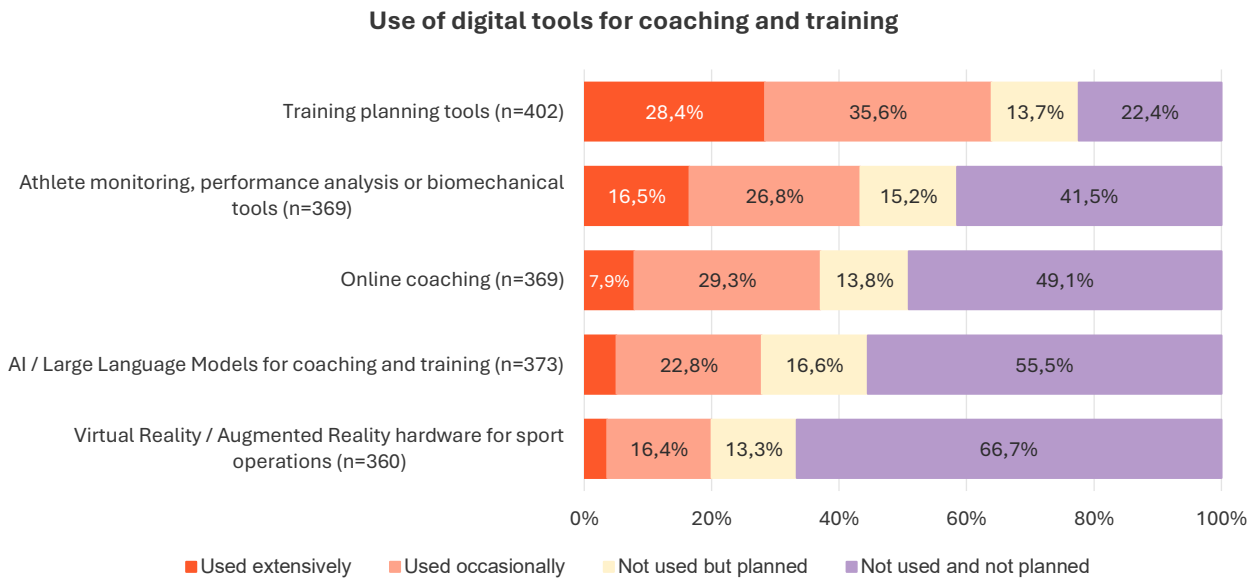

Figure 26. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Coaching or training of sport participants." Note: Sample size varies by tool and is shown beside each tool in the chart.

Training planning tools were the most widely used technology in coaching and training, used by 63.9% of respondents for whom they were applicable (n=402). Adoption was lower for athlete monitoring, performance analysis or biomechanical tools, at 43.4% (n=369), and online coaching, at 37.1% (n=369). AI/LLMs for coaching and training were used by 27.9% (n=373), while Virtual or Augmented Reality hardware was used by 20.0% (n=360).

The less widely adopted technologies also showed evidence of potential growth. A further 16.6% planned to use AI/LLMs for coaching, 15.2% planned to adopt athlete monitoring or performance-analysis tools, and 13.3% planned to use Virtual or Augmented Reality. These intentions indicate interest in more advanced coaching technologies, but current extensive use remains limited, particularly for AI and Virtual or Augmented Reality.

Adoption differed substantially between actors. Athlete monitoring and performance-analysis tools were used by 70.2% of sport federations (n=64), compared with 36.8% of sport clubs (n=261), and by 61.6% of paid-staff-led organisations (n=112), compared with 34.6% of volunteer-led organisations (n=231). Online coaching was also more prevalent among sport federations (60.4%, n=63) than sport clubs (29.4%, n=258). AI use for coaching ranged from 7.1% among organisations with low digital maturity (n=56) to 44.9% among those with high digital maturity (n=98). Although some subgroup bases are modest, the overall pattern suggests that advanced coaching technologies remain concentrated among federations, paid-staff-led organisations and more digitally mature actors.

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6.10 Use of data, reporting and analytics

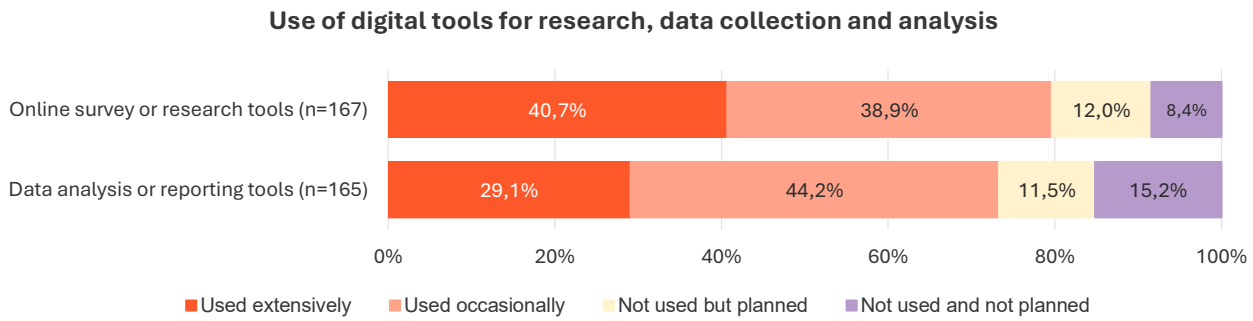

Figure 27. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Research, data collection, reporting or analysis." Note: Sample size varies by tool and is shown beside each tool in the chart.

Among organisations active in research, data collection, reporting or analysis, online survey and research tools were used by 79.6% of respondents for whom they were applicable (n=167). Data analysis or reporting tools were used by 73.3% (n=165). Extensive use was more common for online survey tools (40.7%) than for analysis and reporting tools (29.1%), for which occasional use was the most frequent response.

A further 12.0% planned to adopt online survey or research tools, and 11.5% planned to adopt data analysis or reporting tools. Indicative subgroup differences were more visible for analysis and reporting: these tools were used by 85.2% of sport federations (n=54), compared with 57.8% of sport clubs (n=57). The relatively small bases mean that this comparison should be treated cautiously, but it suggests that collecting data is relatively widespread, while the capacity to analyse and use it systematically may be less evenly distributed.

6.11 Use of tools for digital infrastructure and security

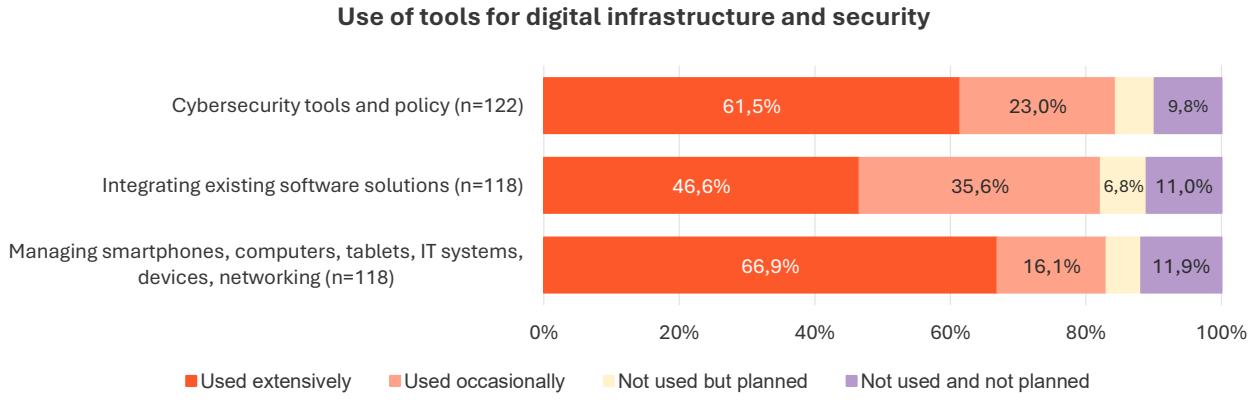

Figure 28. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Digital infrastructure and security." Note: Sample size varies by tool and is shown beside each tool in the chart.

Use of digital infrastructure and security tools was consistently high among respondents for whom these activities were applicable (relatively low n=127-137). Cybersecurity tools and policies were used by 84.4% (n=122), tools for managing devices, IT systems and networks by 83.1% (n=118), and tools for integrating existing software solutions by 82.2% (n=118). Extensive use accounted for 61.5%, 66.9% and 46.6% respectively.

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Only 5–7% of respondents planned to adopt each of these tools, indicating that they are generally established rather than emerging technologies among organisations active in this area. Differences in whether the tools were used were relatively limited across the larger subgroups. Some variation remained in the intensity of use—for example, extensive use of software integration was higher among organisations with high digital maturity than among those with average maturity—but the subgroup bases were small. The findings therefore suggest a comparatively strong infrastructure foundation among applicable organisations, while not necessarily demonstrating the same level of capability across the wider sector.

6.12 Use of digital tools in facility management

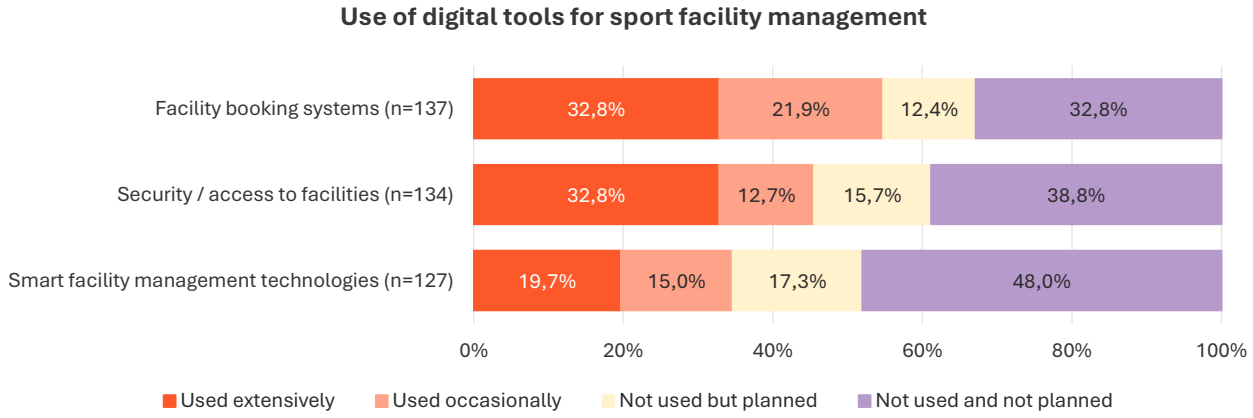

Figure 29. Survey question: "Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Management and maintenance of sport facilities." Note: Sample size varies by tool and is shown beside each tool in the chart.

Facility booking systems were the most widely used facility-management technology, reported by 54.7% of respondents for whom they were applicable (n=137). Automated security or access systems were used by 45.5% (n=134), while smart facility-management technologies—such as sensors, energy-management systems, remote controls or monitoring systems—were used by 34.6% (n=127).

Smart facility-management technologies showed the strongest indication of future uptake, with 17.3% planning to adopt them. Planned use was also reported by 15.7% for automated security or access systems and 12.4% for booking systems. There were indications that adoption increased with organisational size: smart facility technologies were used by 17.1% of organisations with 5–19 staff or volunteers (n=41), compared with 62.5% of those with 100 or more (n=32). However, these subgroup bases are small and the comparison should be treated as indicative. Overall, the results suggest that facility digitalisation is developing, but advanced smart systems remain less widely adopted and may depend particularly strongly on organisational scale, investment capacity and responsibility for physical infrastructure.

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6.13 Technology adoption patterns by self-assessed digitalisation level

Findings show that the self-assessed digitalisation level indicated by the respondents corresponds to both the quantity and sophistication level of the tools used.

The table below shows the mean and median adoption breadth of organisations self-describing at different digitalisation levels. “Adoption breadth” means the average share of tools within the areas of activity used by the organisation out of all applicable tools for the given organisation.

Self-assessed digitalisation level	n	Mean adoption breadth	Median adoption breadth
Very advanced	18	84.4%	86.6%
Above average	127	69.5%	73.1%
About average	303	59.2%	57.3%
Below average	64	46.2%	47.1%
Very low	20	25.5%	22.5%

Table 2 – Tools adoption across different self-assessed digitalisation levels

The findings also show that with higher self-assessed digitalisation levels, not only does the number of tools used increase, but so does their sophistication level.

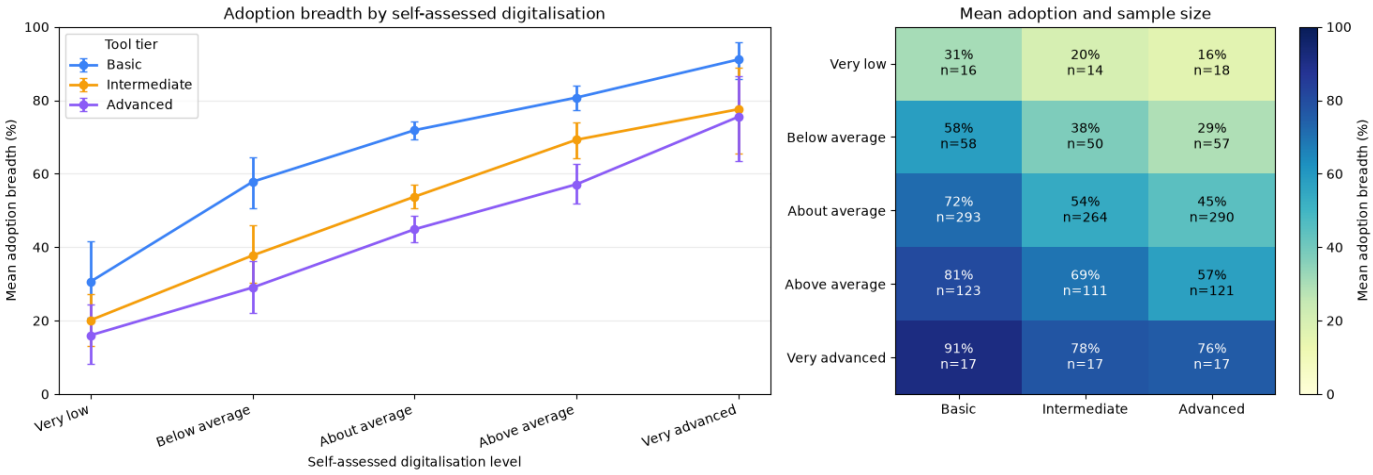

Figure 30. Mean technology adoption breadth by self-assessed digitalisation level and tool sophistication. Note: The analysis includes respondents that provided at least 75% responses and selected at least three applicable tools per tier.

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6.14 Areas in which increased/improved use of digital tools would bring the greatest value

Respondents were asked to select top 3 areas where increased or improved use of digital skills would bring them greatest value. Note that respondents were shown all areas of activity, not just the ones they indicated regular activity in.

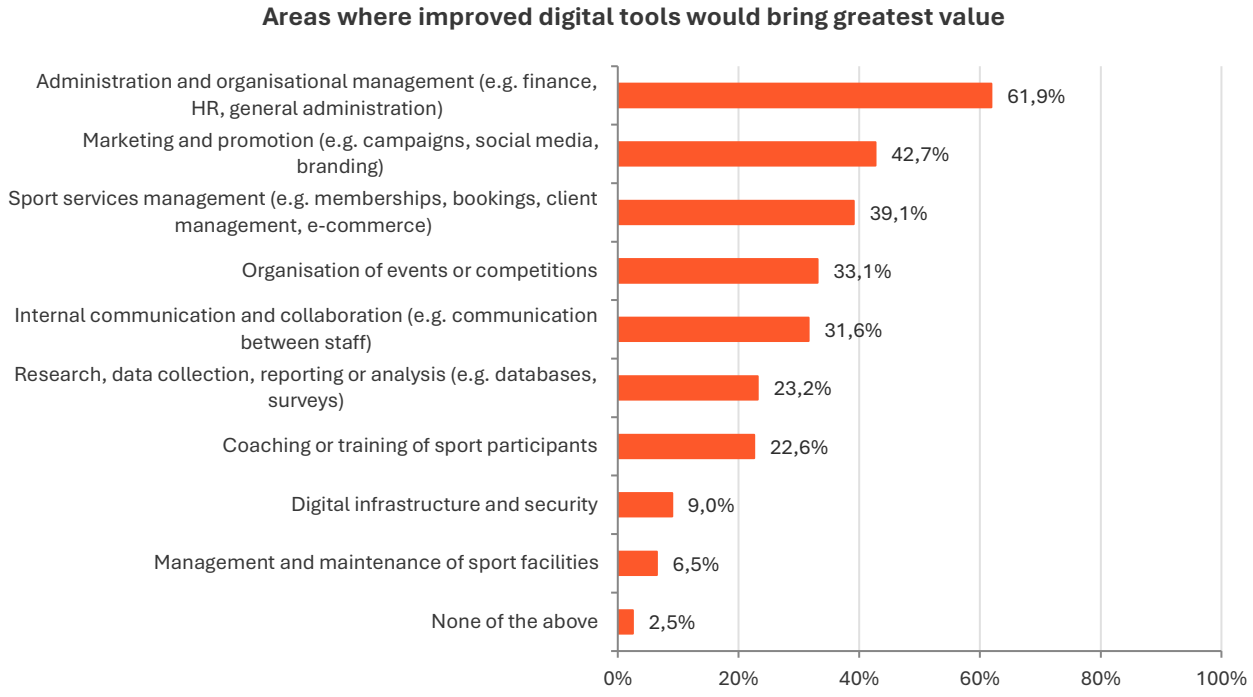

Figure 31. Survey question: "In which areas would increased or improved use of digital tools bring the greatest value to your organisation? Select up to 3." (n=522).

The findings suggest that the TechSportKit training should focus on digital skills, tools and technology in the following areas:

- **Administration and organisational management**
- **Marketing and promotion**
- **Sport services management**

For some parts of the sample the top 3 included 'Organisation of events or competitions' (e.g. Poland, Romania, Spain) or 'Internal communication and collaboration' (e.g. France).

Coaching/training has a relatively low share of respondents including them in their top 3, even among only those organisations that are active in this area only 28% of them selected it. However, 39.1% of respondents that have a 'Coach / trainer / instructor' role in the organisation (n=46) selected it (becoming joined second most popular choice for this group). This suggests that priorities vary by role and that leadership-heavy responses may understate practitioner-specific needs. A further study and consultation with coaches, trainers and other staff would be needed to add to the survey results.

6.15 Summary and implications

The findings show that digital technologies are widely used across responding sport organisations, but that adoption varies considerably by operational area, type of technology and organisational capacity.

6.15.1 Current use of digital tools across operational areas

A strong digital foundation is already in place in communication, marketing and core administrative processes.

- Social media was the most widely used technology covered by the survey, used by 97.7% of respondents for whom this tool was applicable.
- Cloud storage was used by 89.8%
- Membership management systems by 88.2%
- Participant management systems by 87.2%,
- Cybersecurity tools and policies by 84.4%.

Other widely established technologies included non-AI content-creation tools (82.5%), accounting or financial-management software (78.3%), collaboration platforms (77.8%), and client or customer management systems, including booking and registration tools (74.6%).

AI has also become established in some operational areas:

- AI tools for creating marketing content were used by 74.7% of applicable respondents, while 63.1% used AI or Large Language Models for administration.
- Adoption was lower in sport-services management (50.6%) and coaching and training (27.9%), suggesting that AI use remains concentrated in more accessible, general-purpose applications.

More specialised technologies were less widely adopted:

- Service-management automation was used by 40.1%
- Automated content production by 39.7%
- Smart facility-management technologies by 34.6%
- Officiating assistance by 30.1%
- Predictive sport-service analytics by 29.6%, and
- Virtual or Augmented Reality for coaching by 20.0%.

Overall, the findings show that sport organisations have established a strong foundation of communication, marketing and core management tools. The next stage of digitalisation is likely to centre on automation, advanced analytics, AI, fan engagement and smart systems. These more advanced technologies are attracting interest, but their current use remains concentrated among larger and more digitally mature organisations.

6.15.2 Differences in the depth of digitalisation

Digitalisation is uneven both between and within sport organisations. Overall, 82.5% of respondents agreed that the level of digitalisation varies greatly across the sector. When assessing their own organisation, 56.6% described its digitalisation as about average, while 27.4% rated it above average or very advanced and 16.0% rated it below average or very low. In addition, 67.2% reported that the use of digital technologies within their organisation varies according to the age of staff and volunteers.

Use of established tools such as social media, cloud storage and membership management was consistently high across organisational groups. Organisational size became a much clearer differentiator for technologies requiring greater integration, analytical capacity or changes to working practices:

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- Service-management automation was used by 21.1% of organisations with fewer than five staff or volunteers, compared with 59.5% of those with 100 or more.
- Advanced communication analytics was used by 47.5% of organisations with fewer than five staff or volunteers, compared with 78.1% of those with 100 or more.

Differences were also visible between organisational actors for technologies with broad potential applications:

- AI or Large Language Models for administration were used by 78.4% of sport federations, compared with 51.2% of sport clubs.

These findings suggest that larger organisations—and, in some areas, sport federations—are more likely to progress beyond basic digital tools towards more advanced workflows including automation, analytics and AI-enabled working. Further study should test whether this reflects their greater capacity to invest, develop specialist expertise and manage the organisational changes required to embed more advanced technologies.

The mean share of applicable tools used increased at every level of self-assessed digitalisation, from 25.5% among organisations describing their digitalisation as very low to 84.4% among those describing it as very advanced. Although the samples at these two extremes were small, the overall pattern is consistent: organisations self-describing as more digitally mature use both a greater number and a more sophisticated range of technologies, indicating that their self-assessment has basis in usage patterns.

6.15.3 Priorities for future development and support

Respondents identified three operational areas in which increased or improved use of digital tools would bring the greatest value:

- **Administration and organisational management - 61.9%**
- **Marketing and promotion - 42.7%**
- **Sport-services management - 39.1%**

These priorities are consistent with the technologies showing the strongest potential for future uptake. A further 19.9% of applicable respondents planned to adopt administrative automation, 19.7% planned to adopt automated content production, and 18.6% planned to adopt sport-service automation. Planned adoption was also relatively high for fan-engagement solutions and smart facility technologies (both 17.3%), predictive analytics (16.7%), and AI for coaching and training (16.6%).

The findings support a tiered approach to future training and assistance. Smaller, volunteer-led and less digitally mature organisations may first need support to integrate basic, essential technologies in their practices. More digitally mature organisations may benefit from advanced support covering automation, data analysis, AI, system integration and specialised sport technologies.

Across both groups, the objective should be to move beyond the occasional or stand-alone use of individual technologies.

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7. Drivers, benefits and barriers of digitalisation

7.1 Factors influencing digitalisation

Figure 32. Survey question: "What are the main factors influencing your organisation's decisions to use digital tools and technologies? Select up to 5." (n=506).

Organisations' decisions to use digital tools appear to be shaped by a combination of internal ambitions and changes in their operating environment. The most frequently selected individual factor was the desire to modernise the organisation (68.2%), followed by opportunities created by new digital technologies (52.4%) and an internal interest in innovation (46.0%).

External expectations were also influential. Expectations from members, athletes or clients were selected by 41.5% of respondents, while 40.5% indicated that the sport sector is becoming more digital. Requirements from federations, governing bodies or competition organisers influenced 37.5%, and 37.2% identified the need to remain competitive. Funding or external support was the least frequently selected substantive factor, but was still relevant to 30.0% of organisations. Only 1.6% selected none of the proposed drivers.

When the factors are grouped into broader themes, strategic development and competitiveness were identified by 86.0% of respondents, external pressure or sectoral change by 76.5%, and opportunities or external support by 66.8%. As respondents could select several answers, these categories overlap. Nevertheless, the results suggest that digitalisation is not generally being imposed on organisations by one single external factor. It is more often connected to a wider intention to modernise, innovate and respond to a changing environment.

Some differences between organisational actors can be observed. Strategic and competitive drivers were identified by 93.4% of paid-staff-led organisations, compared with 82.0% of volunteer-led organisations. Opportunities and support were also more frequently identified by paid-staff-led organisations (75.4%) than volunteer-led organisations (63.0%). Similarly, this category was selected by 77.0% of national and 85.0% of European or international organisations, compared with 59.6% of local or regional organisations. These descriptive differences may indicate that access to opportunities, funding and external support is less visible or less readily available to organisations operating locally and those relying principally on volunteers.

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7.2 Benefits of digitalisation

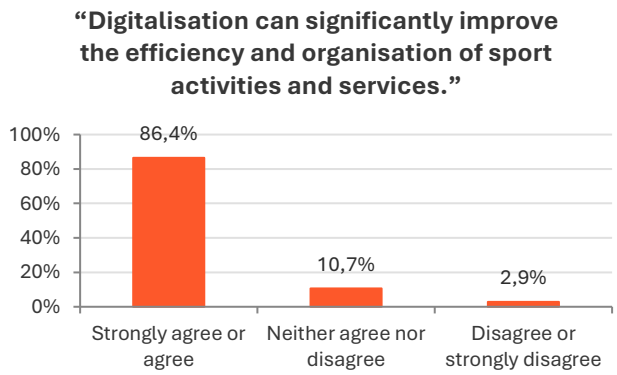

Figure 33. Survey statement: "Digitalisation can significantly improve the efficiency and organisation of sport activities and services." (n=616).

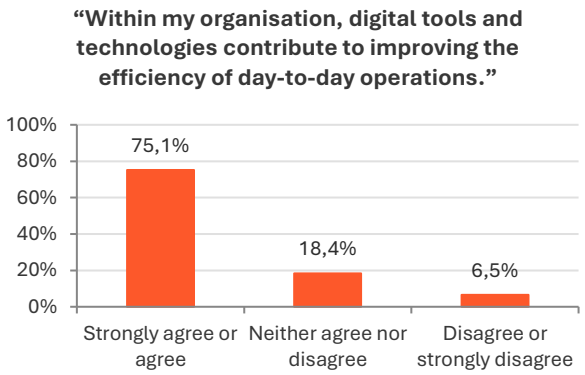

Figure 34. Survey statement: "Within my organisation, digital tools and technologies contribute to improving the efficiency of day-to-day operations." (n=586).

There is broad agreement that digitalisation can improve the efficiency and organisation of the sport sector. Overall, 86.4% of respondents agreed that digital tools and technologies have this potential. A somewhat smaller proportion, 75.1%, agreed that digitalisation was already improving day-to-day efficiency in their own organisation. This difference of 11.3 percentage points suggests that some organisations recognise the potential benefits but have not yet realised them fully in practice.

This implementation gap is particularly evident when results are compared by digital maturity. Among organisations with low digital maturity, 80.2% recognised the general potential of digitalisation, but only 48.8% reported efficiency benefits within their own organisation. By comparison, 91.1% of organisations with high digital maturity reported such benefits. Although these results do not demonstrate causality, they indicate a close relationship between digital maturity and an organisation's ability to convert digital technologies into practical organisational benefits.

7.2.1 Benefits reported by organisations

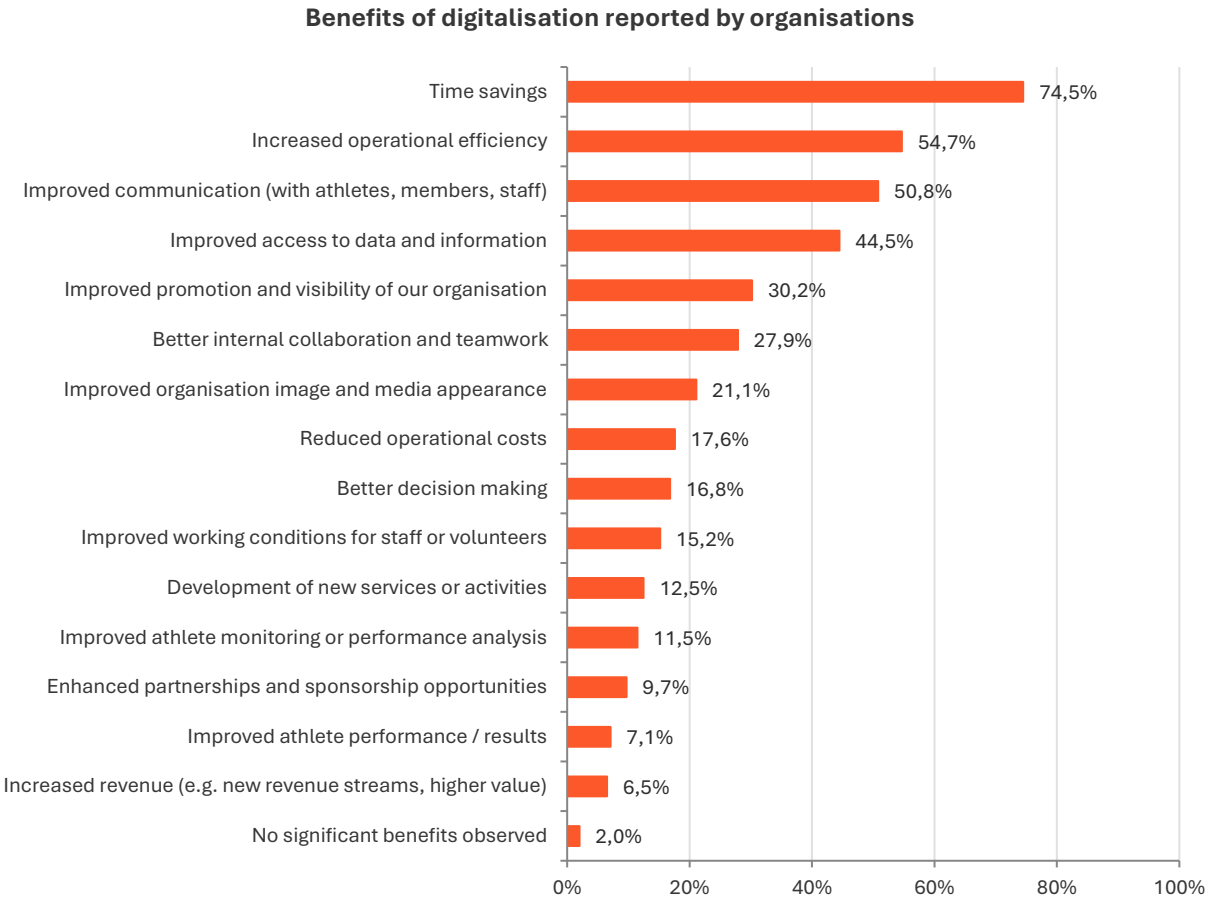

Figure 35. Survey question: “What main benefits has digitalisation brought to your organisation? Select up to 5.” (n=506).

The benefits brought by digitalisation reported by respondents reinforce the predominantly operational nature of the benefits achieved to date. Time savings were the most widely reported individual benefit, selected by 74.5% of respondents. This was followed by increased operational efficiency (54.7%), improved communication with athletes, members or staff (50.8%), and improved access to data and information (44.5%). Improved promotion and visibility was identified by 30.2%, while 27.9% reported better internal collaboration and teamwork.

More transformational outcomes were reported less frequently. Reduced operational costs were identified by 17.6%, better decision-making by 16.8%, the development of new services or activities by 12.5%, and improved athlete monitoring or performance analysis by 11.5%. Enhanced partnerships or sponsorship opportunities were selected by 9.7%, improved athlete performance by 7.1%, and increased revenue by 6.5%.

Grouped together, efficiency, cost and operational benefits (time savings, greater operational efficiency, lower costs, and improved working conditions) were identified by 88.7% of respondents. Communication and collaboration benefits were identified by 62.6%, while 54.3% reported benefits relating to visibility, partnerships or revenue and 53.4% reported improvements relating to data or decision-making. Benefits directly connected to athlete or sport performance were identified by 15.2%. Only 2.0% reported that they had observed no significant benefits.

The findings therefore suggest that digitalisation is currently delivering its clearest value through incremental improvements to everyday work, particularly time savings, efficiency, communication and access to information.

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Evidence of digitalisation supporting new revenue models, new services or improved sporting performance is present, but remains much less widespread.

7.2.2 Note on communication and engagement improvement as digitalisation benefit

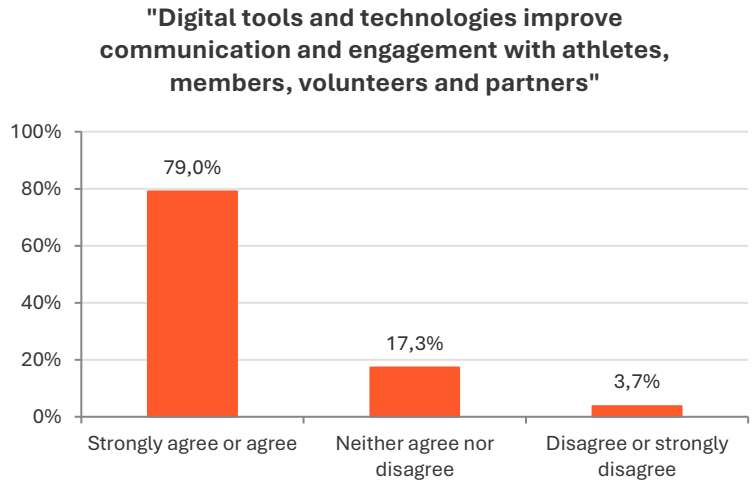

Figure 36. Survey statement: “Digital tools and technologies improve communication and engagement with athletes, members, volunteers and partners.” (n=614).

Although 79% of respondents agreed that communication and engagement with athletes, members, volunteers and partners is improved by digital tools and technologies, only 50.8% selected this as one of the main benefits of digitalisation in their organisations, similar across organisations of varied digitalisation levels (46.6% and 42.9% of respective high and low digitalisation-level organisations).

7.3 Challenges when implementing or using digital tools and technologies

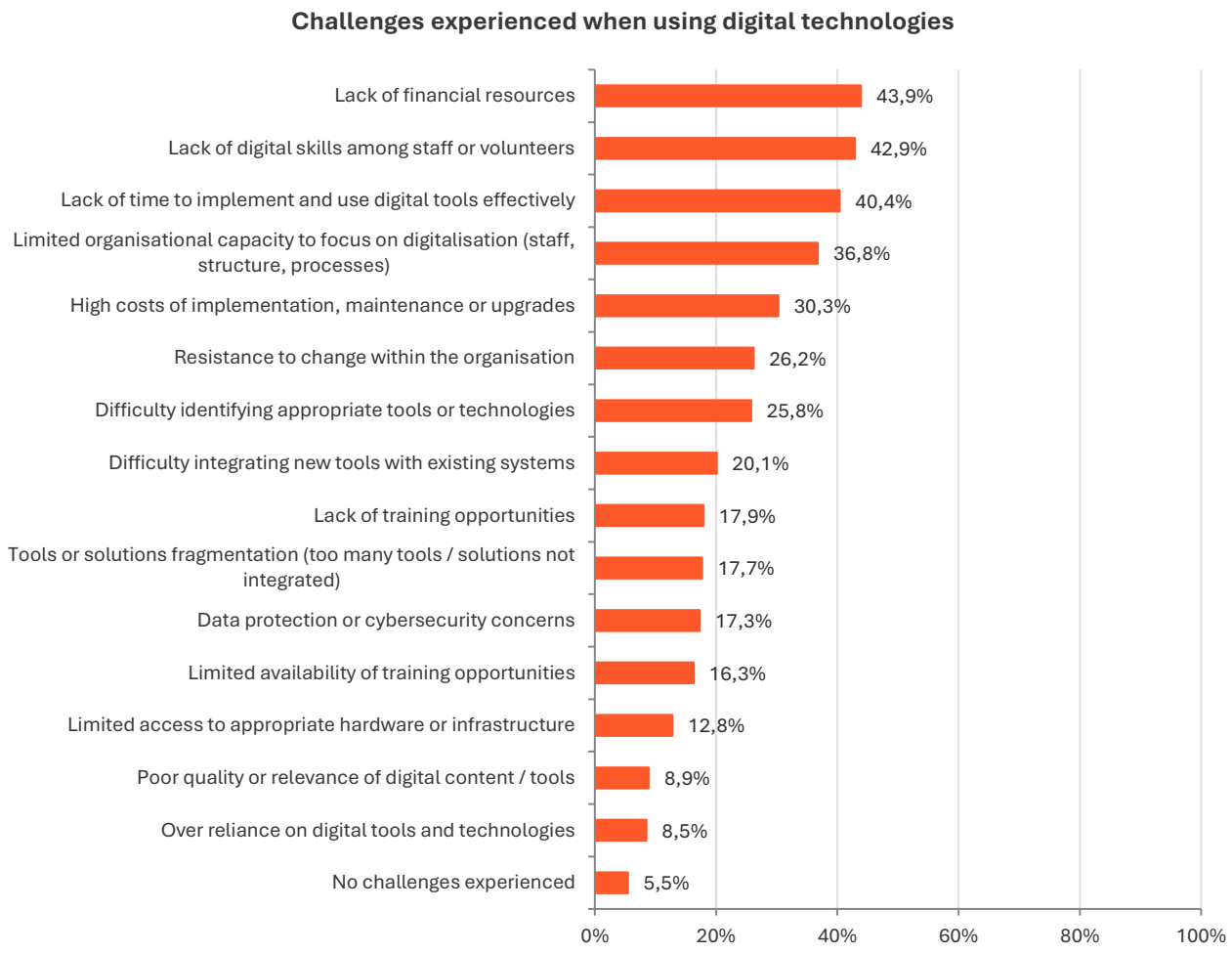

Figure 37. Survey question: "What main challenges has your organisation experienced when implementing or using digital tools and technologies? Select up to 5." (n=492).

The implementation and use of digital technologies remain constrained by a combination of resources, skills and practical implementation difficulties.

The leading individual challenge among the 492 respondents to this question was a lack of financial resources, identified by 43.9% of respondents. This was closely followed by a lack of digital skills among staff or volunteers (42.9%). A lack of time to implement and use digital tools effectively was reported by 40.4%, while 36.8% identified limited organisational capacity and 30.3% highlighted the costs of implementation, maintenance or upgrades.

Practical implementation issues were also important. Resistance to change was reported by 26.2%, difficulty identifying appropriate tools by 25.8%, and difficulty integrating new tools with existing systems by 20.1%. Lack of training opportunities, fragmented tools and systems, and data-protection or cybersecurity concerns were each identified by approximately one sixth to one fifth of respondents.

When individual options are grouped together, 83.7% identified at least one challenge relating to resources, organisational capacity or time. Skills and training challenges were reported by 59.8%, while 55.9% identified difficulties relating to tool selection, integration or quality. Cultural or change-related challenges were selected by 26.2%, and risk or governance issues by 23.4%. Only 5.5% reported experiencing no challenges.

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The broad hierarchy of challenges was similar across organisational actors, although some descriptive differences are visible. For example, tool selection, integration and quality challenges were identified by 67.7% of sport federations, compared with 50.0% of sport clubs. Risk and governance challenges were reported by 30.2% of paid-staff-led organisations and 20.4% of volunteer-led organisations. These differences may partly reflect the more complex systems, data responsibilities and organisational processes found in some professionally staffed organisations.

Overall, the findings show that limited digitalisation cannot be attributed solely to a shortage of technical skills. Organisations are dealing simultaneously with financial constraints, limited staff or volunteer time, insufficient organisational capacity, uncertainty about which tools to choose and difficulties integrating tools into existing work. Training is therefore likely to be most effective when accompanied by practical guidance, implementation support and realistic consideration of organisational capacity.

7.4 Reasons for limited use of digital technologies

Respondents that self-assessed as below average in their digitalisation level were asked about the reasons for their limited use of digital technologies.

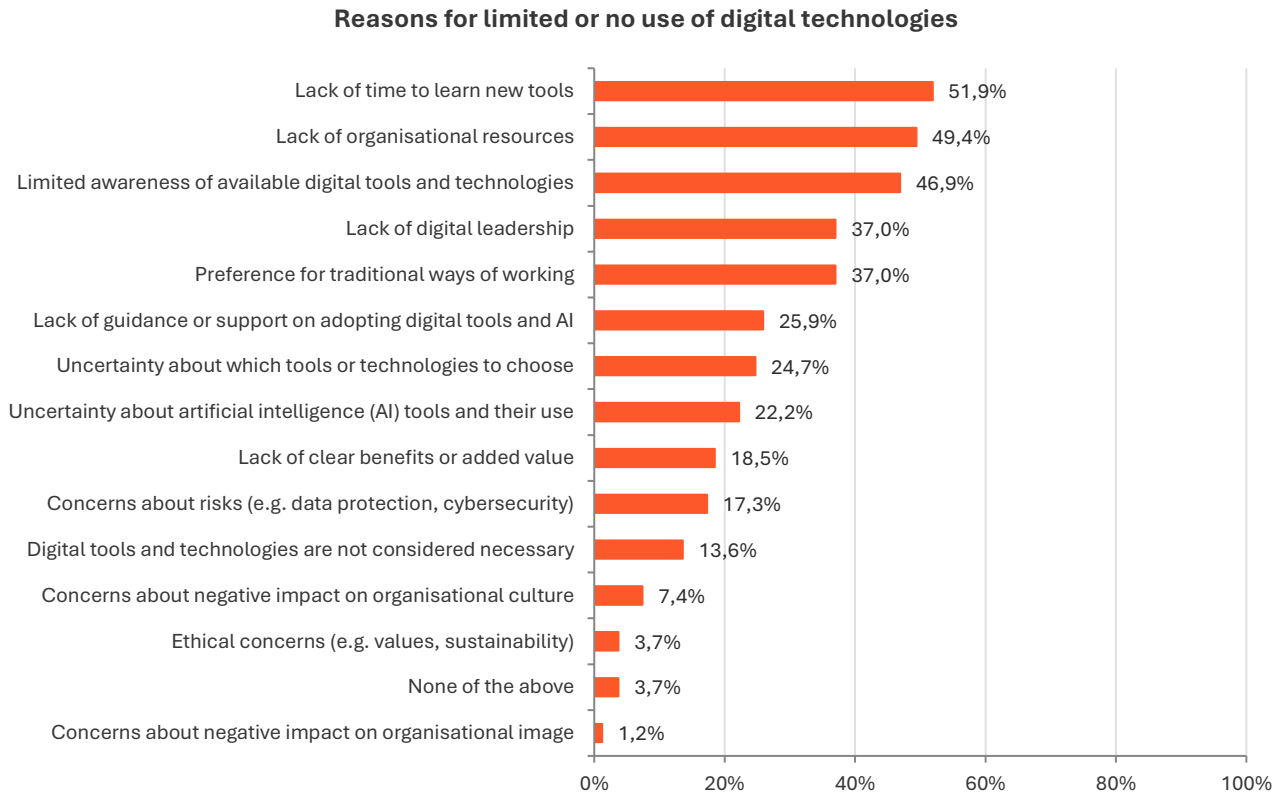

Figure 38. Survey question: “What are the main reasons for the limited or no use of digital technologies in your organisation? Select up to 5.” (n=81). Note: This question was shown to respondents reporting limited or no use of digital technologies.

The most frequently selected reason was a lack of time to learn new tools (51.9%), followed by a lack of organisational resources (49.4%) and limited awareness of the digital tools and technologies available (46.9%). A lack of digital leadership and a preference for traditional ways of working were each identified by 37.0%.

Approximately one quarter reported a lack of guidance or support on adopting digital tools and AI (25.9%) or uncertainty about which tools to choose (24.7%). Uncertainty specifically concerning AI tools and their use was

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selected by 22.2%. A lack of clear benefits or added value was identified by 18.5%, while 17.3% referred to concerns about risks such as data protection or cybersecurity. Only 13.6% indicated that digital technologies were not considered necessary.

Although the small base prevents detailed subgroup conclusions, the findings suggest that limited digital use is more often associated with insufficient time, resources, leadership and guidance than with an outright rejection of digitalisation. Support for less digitally active organisations should therefore include accessible information about suitable tools, practical adoption guidance and opportunities to understand potential benefits, alongside training itself.

7.5 Section summary

Digitalisation in the sport sector is being driven primarily by organisations' desire to modernise, innovate and respond to a changing environment. Its most widely realised benefits are practical and operational, especially time savings, improved efficiency, communication and access to information. More transformational outcomes, including new revenue, services and improvements to sporting performance, remain less widespread.

At the same time, organisations face interconnected financial, organisational and skills-related barriers. The gap between recognising the potential of digitalisation and achieving benefits is particularly visible among organisations with low digital maturity. For organisations making limited use of digital technologies, insufficient time, resources, leadership, awareness and guidance appear more influential than a belief that digital tools are unnecessary. This points to a need for support that combines skills development with leadership, tool-selection guidance and practical implementation assistance tailored to organisations with different levels of capacity.

8. Digital skills gaps

8.1 Views on current digital skills

Respondents were asked about their view on digital skills in the wider sport sector as well as for their organisations specifically.

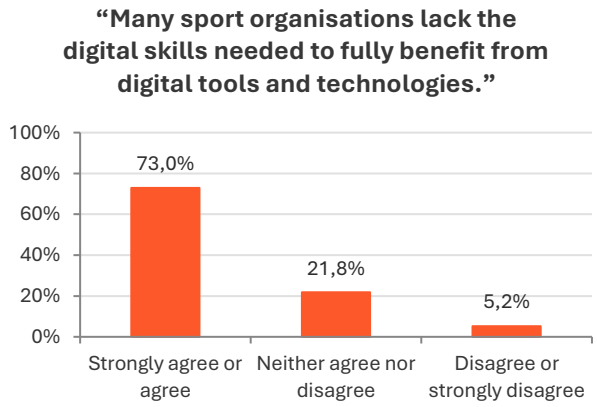

Figure 39. Survey statement: "Many sport organisations lack the digital skills needed to fully benefit from digital tools and technologies." (n=611).

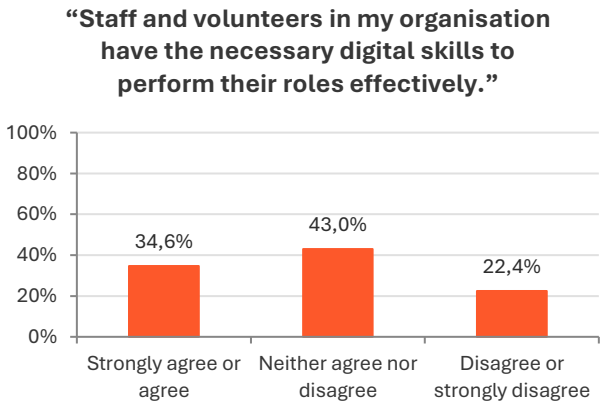

Figure 40. Survey statement: "Staff and volunteers in my organisation have the necessary digital skills to perform their roles effectively." (n=584).

The survey indicates a widespread perception that the sport sector faces significant digital skills gaps. Almost three quarters of respondents (73.0%) agreed that many sport organisations lack the digital skills needed to use technology effectively. Moreover, only 34.6% agreed that staff and volunteers in their own organisation currently have the necessary skills. A further 43.0% gave a neutral response and 22.4% disagreed.

The high proportion of neutral responses however limits the strength of the conclusions. Further study would be required to investigate whether this high share is due to a lack of digitalisation knowledge (what "digital skills" mean or encompass), uneven skills within organisations, limited assessment of staff and volunteer competence, uncertainty about which digital skills will be required in the future, or a reluctance to generalise.

8.2 Views on digital skills for the next generation of staff

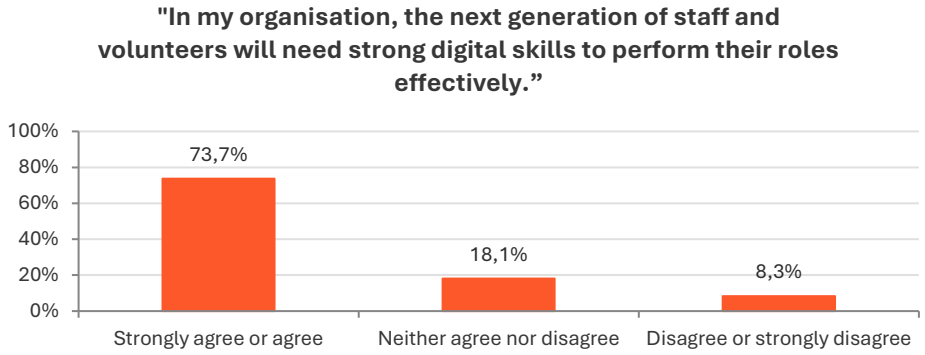

Figure 41. Survey statement: "In my organisation, the next generation of staff and volunteers will need strong digital skills to perform their roles effectively." (n=581).

At the same time, 73.7% agreed that the next generation of sport professionals will need strong digital skills to perform effectively in their roles, demonstrating broad recognition that digital competence will become increasingly important.

These results describe respondents' perceptions and priorities rather than an objective assessment of proficiency. References to "skills gaps" should therefore be understood as reported development needs and areas in which organisations believe additional capability would be valuable.

It is notable that when asked about the top 5 main challenges with digitalisation, "Lack of digital skills" was identified by 42.9% of respondents to be within the top 5 challenges, however "Lack of training opportunities" only by 17.9% and "Limited availability of training opportunities" by 16.3%. Grouped together, 59.8% of respondents consider skills / training to be one of the main challenges.

8.3 Priority areas for digital skills improvement

Respondents were asked to indicate how much of a priority it is to improve digital skills across the activity areas that their organisation was regularly active in – from "Very high priority" to "Not a priority". Figure 42 displays the areas in descending order by overall priority (very high + high).

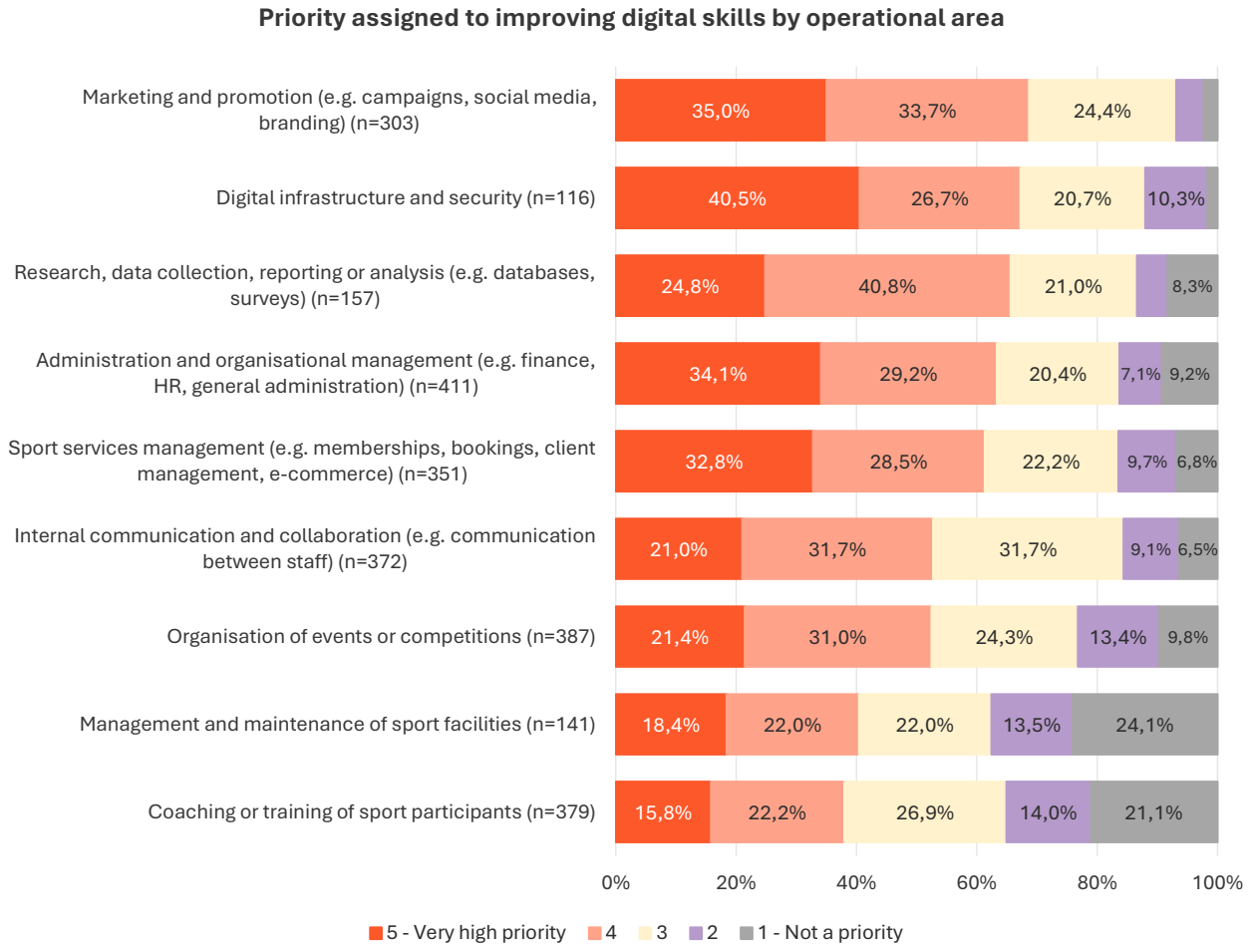

Figure 42. Survey question: "How much of a priority is it to improve digital skills in the following areas in your organisation?" Note: Respondents rated only areas relevant to their organisation; sample size therefore varies by area and is shown in the chart.

Respondents rated digital skills development as a high priority in several organisational areas. Among those for whom each area was relevant, marketing received the highest rating, with 68.7% identifying it as a high or very high priority. This was followed by digital infrastructure and security (67.2%), research, data and reporting (65.6%), administration (63.3%) and sport services (61.3%). Internal communication and collaboration and event organisation were each identified as a high priority by just over half of relevant respondents. Facilities management (40.4%) and coaching (38.0%) received lower overall ratings, although these areas may contain more specialised needs that are not relevant to every organisation.

The number of respondents differed considerably between areas. Administration was relevant to 411 respondents, while digital infrastructure and security was relevant to 116. Consequently, the results should be used to distinguish between areas in which training could reach a large proportion of the sector and areas in which the intensity of need is high among a smaller specialist group.

Administrative skills illustrate some differences between organisational actors. Administrative digital skills were rated as a high priority by 74.4% of respondents from paid-staff-led organisations, compared with 59.1% from

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volunteer-led organisations. They were also rated as a high priority by 77.9% of organisations with high digital maturity, compared with 42.7% of organisations with low digital maturity. Further study could confirm whether this indicates that more digitally mature organisations have a clearer understanding of the additional skills required to improve or extend their systems, while less mature organisations may not yet recognise the full range of possible applications.

8.4 Main digital skills gaps

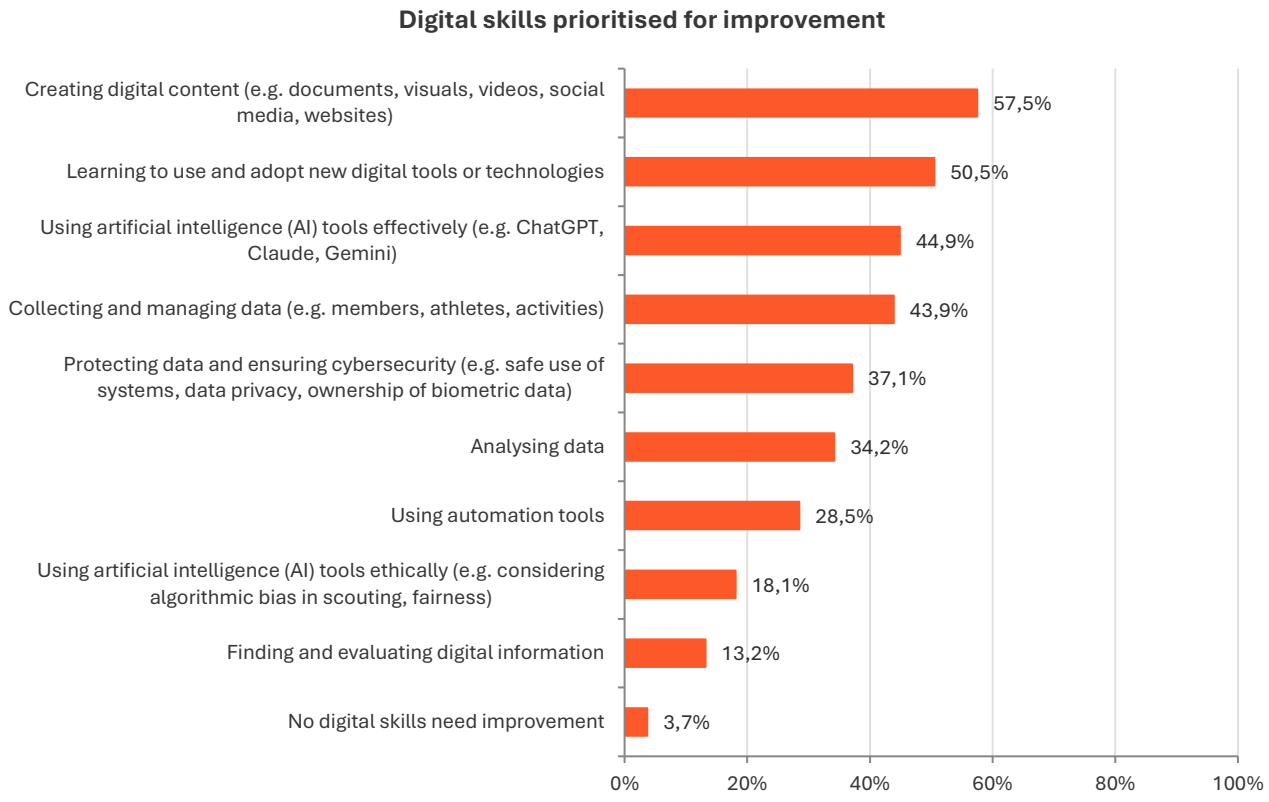

Figure 43. Survey question: "Which of the following digital skills should be prioritised for improvement in your organisation? Select up to 5." (n=485).

When asked which digital skills should be prioritised for improvement, respondents identified a broad combination of technical and practical skills.

At the level of individual skills, creating digital content was the most frequently selected priority, identified by 57.5% of respondents. This included producing documents, visual material, videos, social-media content and websites. Learning to use and adopt new digital tools was selected by 50.5%, while 44.9% prioritised the effective use of AI tools.

Data-related needs were also prominent. Collecting and managing data was selected by 43.9%, protecting data and ensuring cybersecurity by 37.1%, and analysing data by 34.2%. Automation skills were identified by 28.5%. Ethical use of AI was selected by 18.1%, while 13.2% prioritised finding and evaluating digital information.

AI and automation formed the most frequently selected group of needs, identified by 63.9% of respondents. This was followed by data skills (58.6%), digital content creation (57.5%), and general digital adoption skills (56.1%). Security and data protection skills were identified by 37.1%. Only 3.7% stated that no digital skills required improvement.

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The results suggest that organisations need more than advanced or specialist technical training. A substantial part of the need concerns the ability to create content, learn unfamiliar systems, manage organisational data and apply readily available tools effectively in everyday work. AI is becoming an important component of this demand, but it sits alongside continuing needs for general tool adoption, data management and cybersecurity.

Some descriptive differences between organisational actors are visible. Sport federations more frequently prioritised AI and automation (77.7%), data skills (71.3%) and general digital adoption (67.0%) than sport clubs, where the corresponding proportions were 55.1%, 52.0% and 52.4%. Sport clubs were somewhat more likely to prioritise content creation (61.6%, compared with 52.1% of federations).

A similar pattern can be seen by staffing model. Paid-staff-led organisations more frequently prioritised AI and automation (72.4%), data skills (67.9%) and general digital adoption (63.5%) than volunteer-led organisations (60.7%, 53.6% and 54.6% respectively). Volunteer-led organisations placed somewhat greater emphasis on content creation. These findings suggest that professionally staffed and federated organisations may be moving towards more data-intensive and automated applications, while content production and broadly accessible digital tools remain particularly important to clubs and volunteer-led organisations.

8.5 Transversal skills

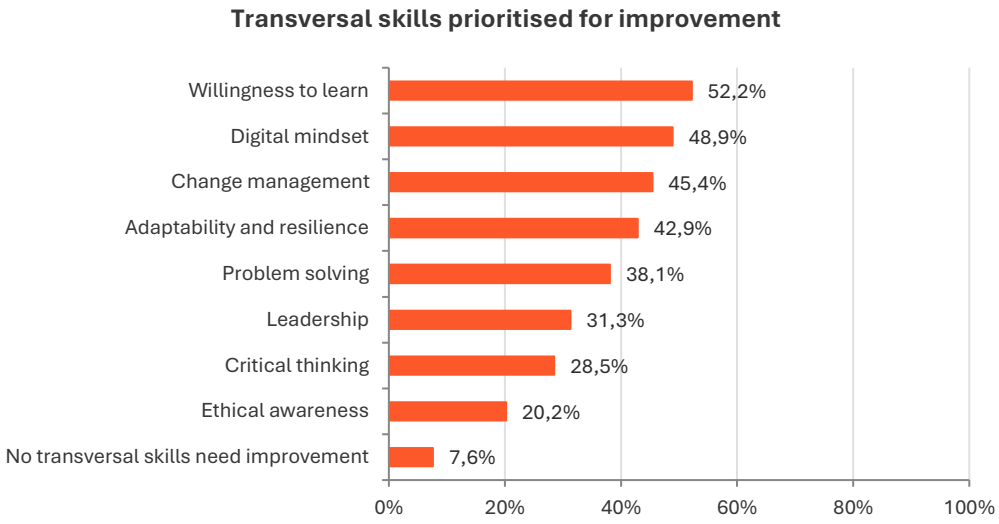

Figure 44. Survey question: “Which of the following transversal skills should be improved as a priority to support digital transformation in your organisation? Select up to 5.” (n=485).

Respondents also identified transversal skills that would support digital transformation. The most frequently prioritised individual skill was willingness to learn (52.2%), followed by a digital mindset (48.9%), change management (45.4%) and adaptability and resilience (42.9%). Problem-solving was selected by 38.1%, leadership by 31.3%, critical thinking by 28.5%, and ethical awareness by 20.2%.

These findings show that the sector’s development needs are not limited to learning how to operate particular tools. Organisations also require people who are willing to learn, able to adapt existing practices and capable of judging when and how technology should be used. Training that focuses only on software functions is therefore unlikely to address the full digital transformation challenge.

The emphasis on change and adaptation was consistently high across organisational groups. Some differences appeared in relation to judgement and problem-solving, which was prioritised by 73.1% of paid-staff-led organisations and 52.9% of volunteer-led organisations. Leadership was also somewhat more frequently selected

by paid-staff-led organisations. These patterns may reflect differences in organisational complexity and in the extent to which staff are responsible for selecting, implementing and governing digital systems.

8.6 Specific tools for which organisations need training or support most

149 respondents answered the open-ended question asking about the specific tools or technologies that their organisation would need training or support for.

Only 49 of the 149 responses (approximately 33%) named at least one identifiable product or platform. The remainder provided only a general technology area, an unclear answer or no requirement.

A particularly important distinction is visible for AI:

- 23 respondents named an AI product
- A further 37 referred to AI generally without naming a tool

Among respondents who identified specific products, the most frequently requested tools were ChatGPT, Claude, Microsoft 365/Office, Microsoft Teams, Microsoft Copilot and Canva. A wide range of sport-specific platforms was also mentioned, although most were identified by only one or two respondents. This included tools for club and membership management, competition organisation, coaching, video analysis and athlete performance.

The table below shows the full overview of specific tools identified by respondents by activity area.[2]

Area	Most frequently named tools	Other named tools
AI and automation	ChatGPT (14), Claude (9), Copilot (5), Gemini (4), Mistral (2)	OpenAI
Productivity and administration	Microsoft 365/Office (6), Excel (2), Word (2), Trello (2), Asana (2), Google Workspace (2)	Notion, Airtable, PowerPoint, Fortnox, Spiris
Communication and collaboration	Teams (6), Google Drive (3)	SharePoint, Outlook, Loop, Slack, Zoom, Bundeling
Sport management	SportAdmin (3), Spond (2)	Matchi, SportEasy, TeamSnap, PLAI, Teamo and others
Marketing and content	Canva (5)	WordPress, Facebook, Instagram, TikTok, X
Data and analytics	Power BI (2)	Google Analytics
Events and competitions	Ianseo (2)	IdrottArenan, SULF Ticketing
Coaching and performance	—	Veo, Coach Logic, XPS Network, PlaySight, Moodle

Table 3 – Specific tools mentioned by respondents, by area.

[2] Existence and spelling of the specific tools submitted were not checked

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8.7 Summary of priority skills development needs

The results point to a layered skills-development requirement. At foundation level, organisations need confidence in learning and adopting unfamiliar technologies, basic data handling, cybersecurity awareness and the ability to evaluate which tools are appropriate. At functional level, they need skills that can be applied directly to administration, communication, marketing, service delivery and events. A smaller but growing requirement concerns more advanced uses of data, automation and AI.

The high priority assigned to change, adaptation and willingness to learn means that these elements should be integrated into technical training rather than treated as separate topics. Organisations need support not only to operate tools, but also to change workflows, make appropriate choices and manage the organisational consequences of digitalisation.

8.7.1 By area

Administration represents one of the broadest opportunities for skills development because it is relevant to a large majority of organisations and was rated as a high priority by 63.3% of applicable respondents. Training should focus on adopting new tools, streamlining routine processes, managing organisational data, using AI and automation appropriately, and improving secure digital record-keeping.

Marketing received the highest priority rating among relevant respondents. The strongest needs are likely to concern content creation, social-media management, visual communication, websites, AI-assisted production and the use of data to understand and engage audiences.

Research, data and reporting should combine data collection and management with analysis, visualisation, interpretation and secure handling of information. Training should also help organisations understand data quality, ownership and the ethical use of personal or athlete data.

Digital infrastructure and security was relevant to a smaller group but received a high priority rating. This points to a concentrated need for cybersecurity, data protection, system selection, integration and governance skills among those responsible for organisational technology.

Sport services require a mixture of general tool-adoption skills, data management, communication and the effective use of digital platforms to support members, participants and athletes. AI and automation may increasingly assist service delivery, but training should remain connected to identifiable organisational needs.

Internal communication and event organisation require practical skills in collaboration platforms, digital content, online and hybrid delivery, scheduling, participant management and the automation of repetitive processes.

Facilities management and coaching received lower overall priority ratings. However, this should not be interpreted as an absence of need. Digital skills in these areas may be more specialised, including facility-management systems, video and performance analysis, athlete monitoring and the responsible use of biometric data. The smaller relevant bases and varying organisational contexts mean that training in these areas should be targeted rather than treated as a universal requirement.

Area	Respondents active in the area	Respondents that consider the area to be of greatest (top 3) value to increase / improve use of digital tools in	Respondents that consider the improvement of digital skills in this area (if active) a high priority	Most often used or planned tools	Relevant digital skills which are considered to be most important to improve by respondents (top 3 by importance)
Marketing and promotion (e.g. campaigns, social media, branding)	62.9%	42.7%	68.7%	- Social media platforms - Digital content creation tools - AI tools for content creation - Advanced communication performance data gathering and analysis	- Creating digital content (e.g. documents, visuals, videos, social media, websites) - Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini)
Digital infrastructure and security	23.4%	9.0%	67.2%	- Cybersecurity tools and policy Integrating existing software solutions - Managing hardware, networking	- Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini) - Protecting data and ensuring cybersecurity (e.g. safe use of systems, data privacy, ownership of biometric data)
Research, data collection, reporting or analysis (e.g. databases, surveys)	31.8%	23.2%	65.6%	- Online survey or research tools - Data analysis or reporting tools	- Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini) - Collecting and managing data (e.g. members, athletes, activities)
Administration and organisational management (e.g. finance, HR, general administration)	82.9%	61.9%	63.3%	- Accounting or financial management software - Automation of administrative tasks - AI / LLM for administration and management	- Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini) - Using automation tools
Sport services management (e.g. memberships, bookings, client management, e-commerce)	72.8%	39.1%	61.3%	- Membership management systems - Participant management systems - Client or custom management system - AI / LLM for management of sport services	- Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini) - Collecting and managing data (e.g. members, athletes, activities)

Area	Respondents active in the area	Respondents that consider the area to be of greatest (top 3) value to increase / improve use of digital tools in	Respondents that consider the improvement of digital skills in this area (if active) a high priority	Most often used or planned tools	Relevant digital skills which are considered to be most important to improve by respondents (top 3 by importance)
Internal communication and collaboration (e.g. communication between staff)	75.3%	31.6%	52.7%	- Cloud storage systems - Collaboration platforms	- Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini) - Using automation tools
Organisation of events or competitions	79.4%	33.1%	52.4%	- Broadcasting technology - Ticketing software	- Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini) - Using automation tools
Management and maintenance of sport facilities	28.9%	6.5%	40.4%	- Facility booking systems - Security / access to facilities - Smart facility management technologies	- Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini) - Using automation tools
Coaching or training of sport participants	78.0%	22.6%	38.0%	- Training planning tools - Athlete monitoring, performance analysis or biomechanical tools - Online coaching	- Learning to use and adopt new digital tools or technologies - Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini) - Protecting data and ensuring cybersecurity (e.g. safe use of systems, data privacy, ownership of biometric data)

Table 4 – Priority skills development needs – by area (activity %, greatest value %, priority %)

8.8 Summary of section

The survey provides strong evidence of perceived digital skills-development needs across the sport sector, although it does not constitute an objective assessment of proficiency. Respondents widely recognise a sector-level skills shortage, but many are uncertain whether their own staff and volunteers have the capabilities required.

The most prominent technical priorities are AI and automation, data skills, content creation and the ability to learn and adopt new tools. These are accompanied by substantial needs in cybersecurity and data protection. Equally important are transversal capabilities—particularly willingness to learn, a digital mindset, change management, adaptability and problem-solving.

Priorities vary according to organisational role and capacity. Federations and paid-staff-led organisations place greater emphasis on AI, data and general digital adoption, while clubs and volunteer-led organisations show a relatively stronger need for content creation and accessible everyday applications. The findings support a flexible training model combining common foundational skills with role-specific pathways for administration, marketing, data, infrastructure, sport services and other specialist areas.

9. Training and support needs

9.1 Current availability of digital skills training

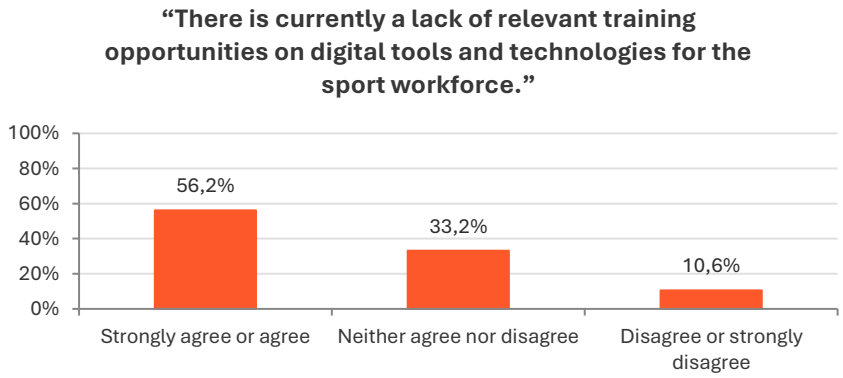

Figure 45. Survey statement: "There is currently a lack of relevant training opportunities on digital tools and technologies for the sport workforce." (n=614).

More than half of respondents (56.2%) agreed that there is currently a lack of relevant training opportunities on digital tools and technologies for the sport workforce. One-third (33.2%) neither agreed nor disagreed, while only 10.6% disagreed. This indicates a substantial perceived shortage, although the high proportion of neutral responses suggests that awareness of, and access to, relevant opportunities may vary across the sector.

The perceived shortage was most pronounced among organisations reporting low digital maturity: 68.6% agreed that relevant training opportunities were lacking, compared with 55.9% of organisations with average digital maturity and 52.7% of those with high digital maturity.

9.2 Current provision of digital tool training and support

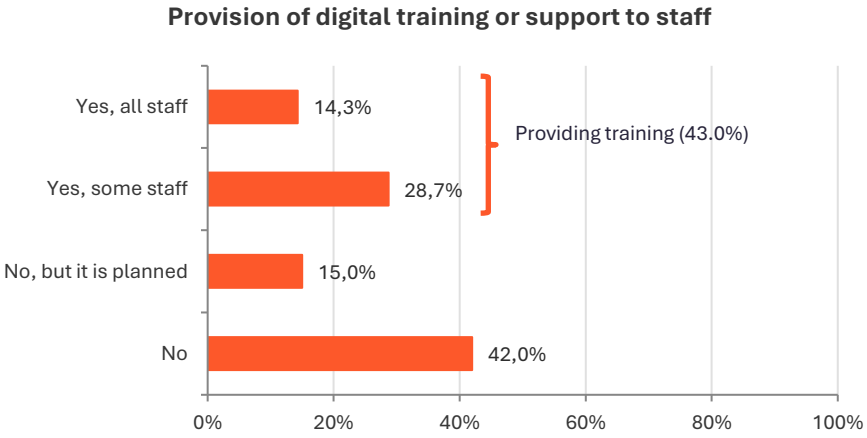

Figure 46. Survey question: "Does your staff (paid and volunteer) receive training and/or support on digital tools?" (n=481).

Current provision of training and support appears limited and uneven. Of the respondents answering this question, 43.0% reported that their staff or volunteers currently receive some form of training or support. However, only 14.3% indicated that it is available to all staff, while 28.7% reported provision for only some staff.

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A further 15.0% said that training was planned, and 42.0% reported no provision. Overall, therefore, 57.0% of responding organisations did not currently provide training or support.

Access to training was related to organisational capacity. Current provision was reported by 61.7% of sport federations, compared with 33.0% of sport clubs. It was also more common among organisations with 100 or more staff and volunteers (61.3%) than among those with fewer than five (30.5%), and among paid-staff-led organisations (52.6%) compared with volunteer-led organisations (36.5%). The largest difference was associated with digital maturity: 59.8% of organisations with high digital maturity provided training, compared with only 16.2% of organisations with low digital maturity. Although the statistical associations were generally weak, the consistency of the pattern suggests that smaller, volunteer-led and less digitally mature organisations were least likely to report current training or support and should be monitored as priority groups in future provision.

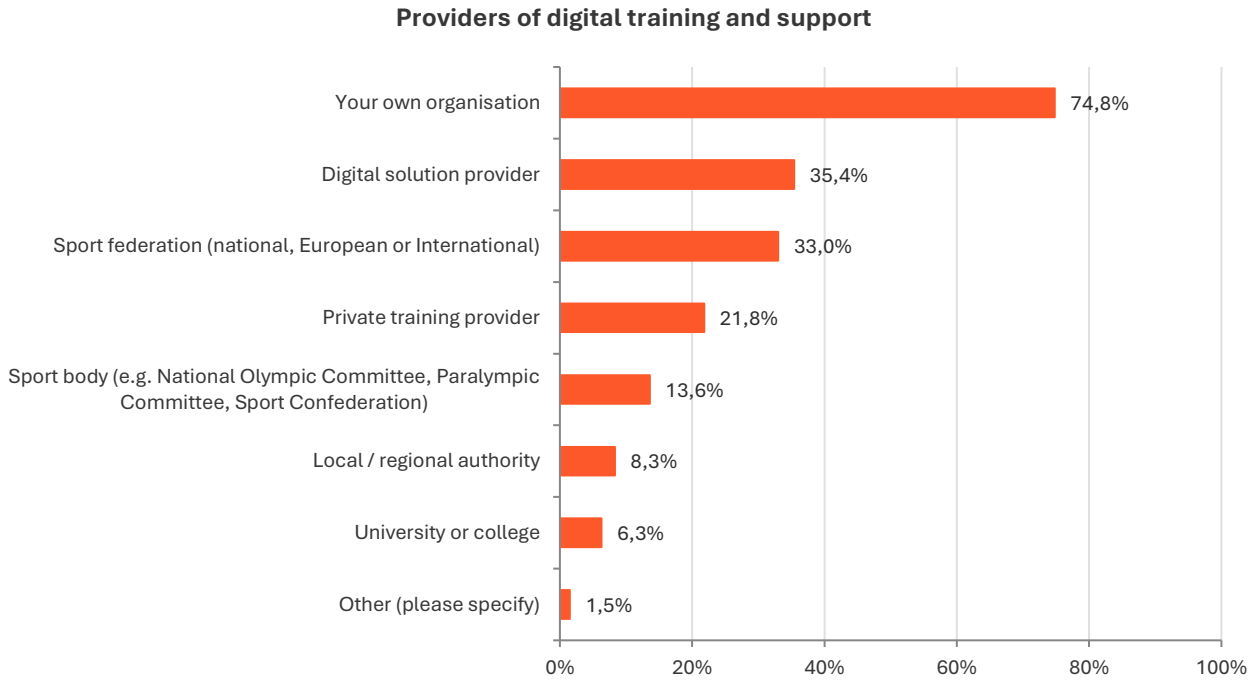

Figure 47. Survey question: “Which provider is responsible for the training and/or support? Tick all that apply.” (n=206). Note: This question was shown to respondents reporting that training or support is provided.

Where training or support was provided, it was most commonly delivered by the organisation itself (74.8%). Digital solution providers (35.4%) and sport federations (33.0%) were the main external sources, followed by private training providers (21.8%). Local or regional authorities, universities and colleges, and other sport bodies played a more limited role. These findings suggest that most organisations rely on internal capacity, supplemented by technology suppliers and sector-level organisations.

9.3 Interest in future training

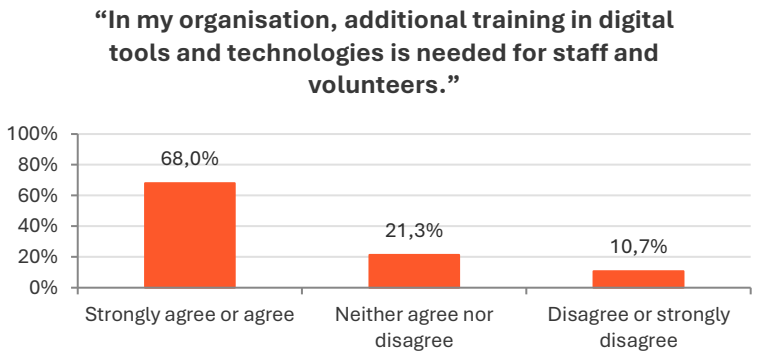

Figure 48. Survey statement: "In my organisation, additional training in digital tools and technologies is needed for staff and volunteers." (n=581).

The perceived need for additional training within respondents' own organisations was high. More than two-thirds (68.0%) agreed (32.7%) or strongly agreed (35.3%) that additional training in digital tools and technologies was needed for their staff and volunteers. A further 21.3% neither agreed nor disagreed, while only 10.7% disagreed. The higher level of agreement concerning respondents' own organisations, compared with the perceived shortage of opportunities across the sector, suggests that organisations recognise their training needs more clearly than they recognise gaps in the wider training market.

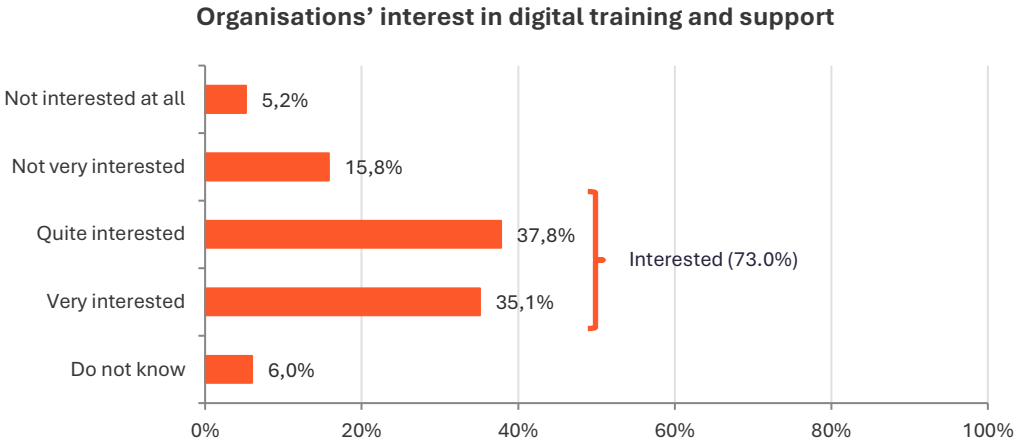

Figure 49. Survey question: "How interested would your organisation be in undertaking training and/or receiving support related to digital tools and technologies?" (n=481).

This need is reflected in strong interest in future provision. Overall, 73.0% of organisations were interested in undertaking training or receiving support, including 35.1% that were very interested and 37.8% that were quite interested. Only 21.0% expressed low interest, while 6.0% did not know. Interest increased substantially with the stated level of need: 89.1% of respondents who strongly agreed that additional training was required were interested in future provision.

Importantly, interest was not confined to organisations already offering training. Almost two-thirds (63.9%) of organisations with no current provision were interested, rising to 75.8% among those already providing training and 90.3% among those planning to introduce it. Interest was higher among national and European or international organisations than among local or regional organisations. Nevertheless, a clear majority of local and regional organisations were also interested, indicating that they should remain an important target group.

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9.4 Preferred training formats

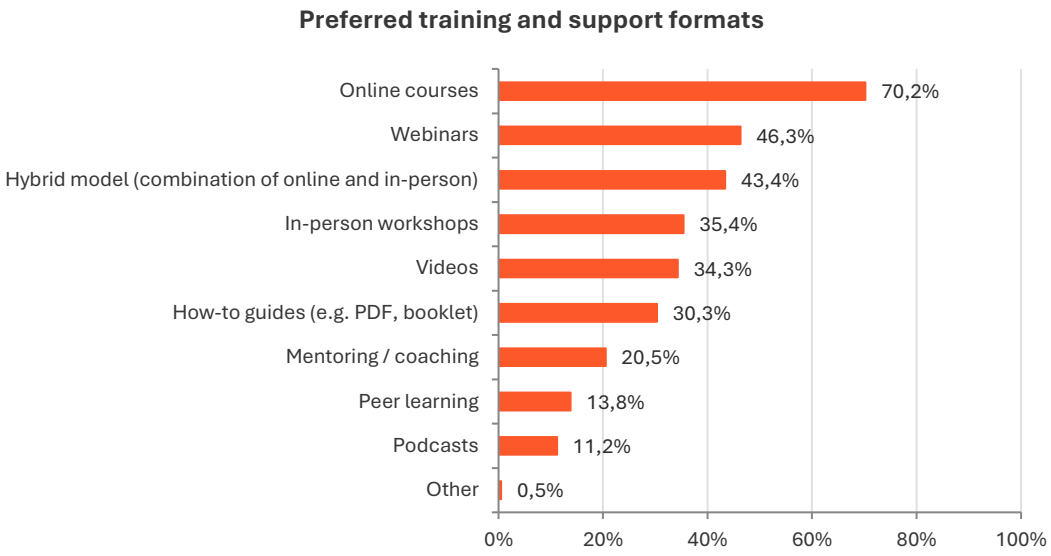

Figure 50. Survey question: “Which training delivery or support format would you prefer for your organisation? Tick all that apply.” (n=376).

Online courses were the most frequently selected training format, chosen by 70.2% of respondents. Webinars (46.3%) and hybrid learning combining online and in-person delivery (43.4%) were the next most popular options, followed by in-person workshops (35.4%). Videos (34.3%) and how-to guides (30.3%) were also selected by substantial proportions of respondents. Mentoring or coaching (20.5%), peer learning (13.8%) and podcasts (11.2%) attracted more limited interest.

The findings therefore support an online-first approach, but not an online-only model. Organisations appear to value a combination of structured digital learning, opportunities for live interaction and practical resources that can be consulted when needed.

9.5 Preferred delivery models and schedules

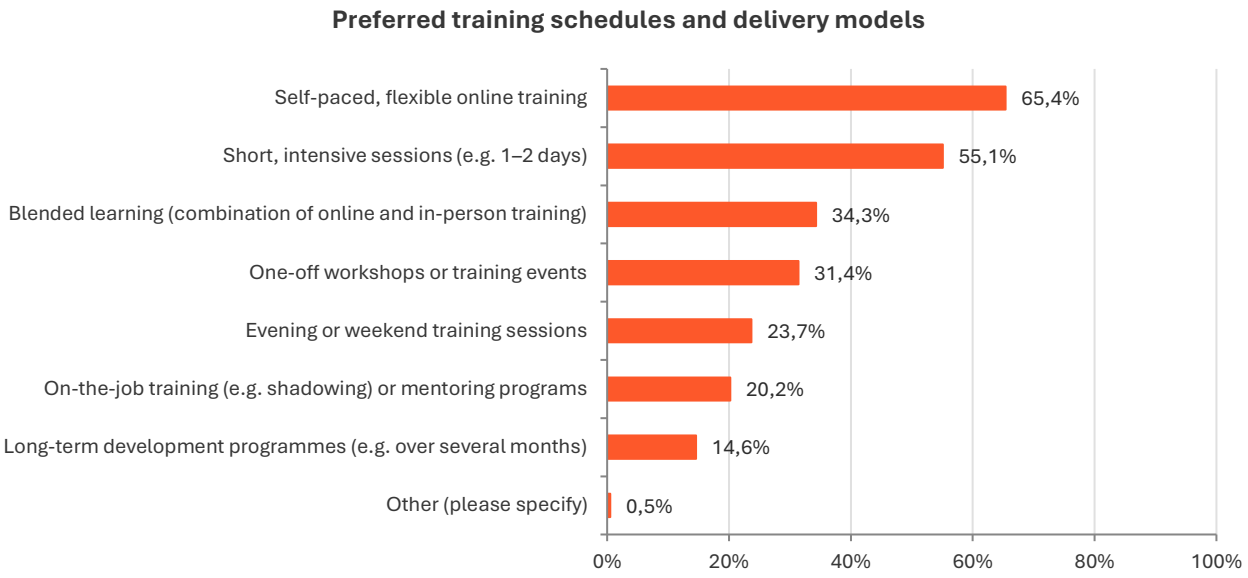

Figure 51. Survey question: “Which type of training schedule or support would be the most suitable for your organisation? Tick all that apply.” (n=376).

Flexibility and manageable time commitments were the clearest priorities. Self-paced, flexible online training was selected by 65.4% of respondents, while 55.1% preferred short, intensive sessions lasting one or two days. Blended learning was selected by 34.3% and one-off workshops or training events by 31.4%. Evening or weekend sessions (23.7%), on-the-job training or mentoring (20.2%) and longer-term development programmes (14.6%) were less frequently selected.

Although subgroup differences were weak, they provide useful indications for delivery planning. Volunteer-led organisations were more likely to select self-paced online training and evening or weekend sessions, while paid-staff-led organisations showed a stronger preference for short, intensive sessions and on-the-job support. Organisations with no current training provision also showed a particularly strong preference for self-paced online training, whereas organisations already providing training were more likely to select short, intensive sessions.

These findings suggest that provision should offer more than one route. Flexible, self-paced modules would provide an accessible entry point for organisations with limited capacity, while short live sessions, blended activities and optional workplace support could meet the needs of organisations with more established training structures.

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10. Good practice examples

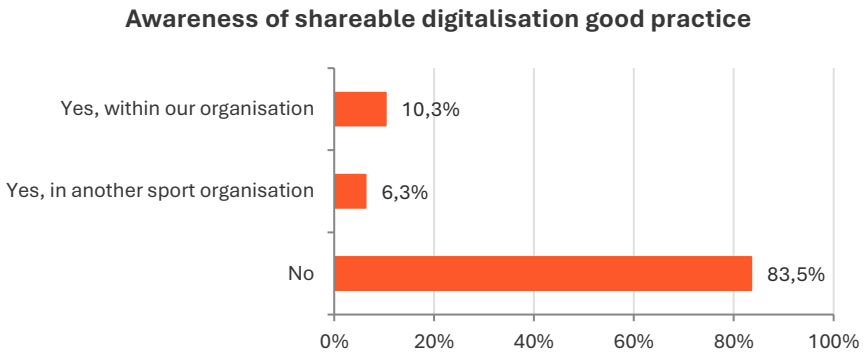

Figure 52. Survey question: “Are you aware of any good practice related to digitalisation in the sport sector that could be shared with the project and other sport organisations?” (n=478).

Respondents were asked about awareness of good practice related to digitalisation. 79 respondents indicated that they are aware of a good practice example either in their organisation (49) or another (30). 58 out of 79 provided a brief description of the good practice; and 48 allowed the partnership to contact them to discuss the case study.

Project partners will reach out to the respondents willing to be contacted to include the best practices in the final research report.

11. Conclusions and implications

11.1 Conclusions

The survey provides a substantial evidence base on how participating sport organisations perceive and use digital technologies and where they require further support. The findings should, however, be interpreted as evidence from the survey sample rather than statistically representative estimates for the European sport sector as a whole.

Overall, digitalisation seems to be already embedded in many organisational activities of the sector, but its depth, purpose and maturity vary considerably. The findings suggest that future support should extend beyond the initial adoption of digital tools and technologies. Respondents reported widespread use of familiar tools and technologies for administration, communication, marketing and participant management, but the benefits most frequently identified were operational — particularly time savings, efficiency, communication and access to information — while more strategic and developmental outcomes — such as better decision-making, new services, increased revenue and improved athlete performance — were reported less often. These findings indicate a need for practical support that helps sport organisations select and implement technologies effectively in their own contexts. This could include guidance on assessing organisational needs and evaluating whether adopted technologies deliver the intended benefits.

The next challenge is therefore not simply greater technology adoption by sport organisations, but more effective and purposeful use of existing tools and technologies while progressively building the capacity to engage with more advanced solutions. In some organisations, this will require strengthening competence in established administrative and management tools. In others, it will mean improving awareness and practical understanding of technologies such as AI, analytics, automation and specialised sport technologies.

A related gap exists between recognising the importance of digitalisation and embedding it strategically. 88.1% of respondents agree digital tools are becoming essential, but only 48.7% say investment in digital tools, technologies and skills is becoming a strategic priority for them. Although most respondents consider digital technologies increasingly important, fewer report that investment in digital tools, infrastructure and skills is becoming an organisational priority. The findings suggest that a need to explore how leadership, strategic ownership, digital planning and organisational readiness can help and be important to achieving more sustainable digital transformation.

Digital competence should be understood broadly. It encompasses not only the ability to operate particular tools, but also the capacity to:

- assess organisational needs and select suitable technologies;
- evaluate the usefulness and reliability of digital solutions;
- create and manage digital content and data;
- adapt working practices and manage organisational change;
- apply appropriate data-protection and cybersecurity practices; and
- continue learning as technologies evolve.

Technical skills should therefore be developed alongside transversal capacities such as critical thinking, adaptability, problem-solving, responsible use and willingness to learn.

The results also demonstrate that limited digital transformation cannot be attributed solely to financial constraints. Only 34.6% agree that their workforce currently has the necessary digital skills, 68% say additional

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digital training is needed, and 73% are interested in future digital training/support. Insufficient skills, lack of time, limited staffing and volunteer capacity, difficulties selecting and integrating tools, and resistance to changing established practices all affect organisations' ability to benefit from technology. Skills development appears to be an important aspect, but training alone will not address these wider implementation barriers.

Different organisations will require different forms and levels of support. Smaller, local, volunteer-led and less digitally mature organisations are likely to need accessible foundational provision. More digitally advanced organisations may benefit from specialised support relating to data analysis, automation, artificial intelligence, systems integration and sport-specific technologies. A single, uniform approach would therefore be unlikely to meet the needs of the sector.

Some findings require further investigation. In particular, the comparatively lower use of technologies supporting coaching, athlete development and performance may reflect their specialist relevance and cost, the profile of participating organisations, or the predominance of managers and board members among respondents. The findings concerning data protection and cybersecurity also warrant qualitative follow-up to determine whether they reflect capability gaps, unclear organisational responsibility or differences in how respondents understood the survey terminology.

11.2 Implications for upcoming TechSportKit activities

The survey provides an initial evidence base on digital tools and technology use, perceived benefits, barriers and training needs among participating sport organisations. It also identifies questions that require further investigation and provides initial priorities for the subsequent TechSportKit activities.

The implications below should be interpreted with appropriate caution. The survey reflects the views and opinions of participating organisations and does not provide statistically representative estimates for the European sport sector as a whole. Its findings should therefore be used to inform, rather than predetermine, the remaining research, competence-framework and training activities.

11.2.1 WP2 – Remaining research and consultation

The survey shows that digital technologies are already used across many organisational activities in the sport sector, but it does not fully explain why particular patterns occur or how technologies and tools are affecting individual tasks, occupations and future workforce requirements. These issues should be examined through the planned labour-market research, roundtables, expert consultation and case studies.

Testing and explaining the survey findings

The roundtables should be used to present and test whether the survey findings reflect the experience of a broader range of stakeholders and to explore the reasons behind them. Particular attention should be given to the following findings:

- Familiar technologies are widely used for administration, communication, marketing and participant management, but reported benefits are concentrated mainly on efficiency, time savings, communication and access to information. Further consultation should investigate why benefits such as improved decision-making, new services, revenue generation and athlete performance are reported less frequently and identify examples where wider benefits have been achieved.
- Respondents generally recognise the growing importance of digitalisation, but fewer report that investment in digital tools and skills is becoming an organisational priority. The roundtables should examine what prevents awareness from translating into strategy/action, including the influence of leadership, resources, organisational culture and the allocation of responsibility.

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- Organisations reported difficulties selecting suitable digital tools, integrating systems and changing established practices. Consultation and case studies should explore how these barriers arise, how they differ between organisations and what has enabled some organisations to overcome them.
- Data protection, cybersecurity and responsible use were considered important, but digital infrastructure and security were less frequently identified as regular operational areas. Further investigation should establish whether this reflects limited capability, unclear responsibility, lack of resources or differences in how respondents understood the survey terminology.
- Reported AI use does not establish how extensively or effectively AI is being applied. Further research should distinguish occasional individual use from more systematic organisational adoption and explore its effects on tasks, responsibilities, data practices and skill requirements.

Roundtable discussions should examine differences between organisational and national contexts rather than seeking only general agreement with the survey results.

A full list of potential questions to use is provided in an Annex in section *12.4 Potential questions to include in upcoming research activities*.

Job roles and future workforce needs

The effects of technology on occupations and future workforce requirements in the sector were not examined through the survey. This is a central requirement of the wider WP2 work and should be developed through desk research and roundtable consultation with sport employers, professionals and technology experts.

The subsequent research should investigate:

- which tasks and job roles are already being changed, supported or automated;
- whether technologies are replacing particular tasks, augmenting existing roles or creating new responsibilities;
- how the effects differ across management, administration, communication, marketing, events, coaching and performance;
- which technologies are likely to have the greatest workforce impact in the coming years; and
- which digital and transversal competences will be required at different occupational and responsibility levels.

Addressing underrepresented perspectives

Managers and board members constituted a substantial proportion of survey respondents. The roundtables might therefore include operational practitioners whose perspectives may be less visible in the survey.

In addition to sport employers, managers, training providers, technology experts and policymakers, consideration should be given to involving:

- coaches, trainers and performance staff;
- people responsible for data, digital systems or cybersecurity;
- staff and volunteers responsible for administration, communication, marketing and events;

The comparatively lower use and priority of coaching, athlete-development and performance technologies particularly warrants consultation with coaches, trainers and performance staff. This should establish whether the result reflects limited relevance, cost, lack of expertise, the characteristics of the responding organisations or the respondent profile.

Case studies and good practices

The partnership should seek examples that help explain the survey findings, including:

- organisations that have moved beyond operational efficiency to achieve wider organisational or sport-related benefits;
- examples of successful tool selection, system integration and organisational change;
- responsible applications of AI, data and other emerging technologies;
- cases involving grassroots or volunteer-led organisations as well as more digitally advanced organisations; and
- examples of difficulties or unsuccessful implementation from which useful lessons can be drawn.

The case studies should consider the organisational context, roles and working practices affected, barriers encountered, enabling factors, outcomes achieved and potential transferability to other sport organisations.

Comprehensive report

The later comprehensive WP2 report should synthesize the survey findings with the labour-market analysis, roundtables, expert consultation, desk research and case studies. This combined evidence should provide a stronger basis for assessing the effects of digitalisation on employment, anticipating future skill needs and informing WP3.

Dissemination opportunity

A shorter, industry-facing summary of the comprehensive WP2 report may also be considered as part of dissemination (WP5) to complement the full report by presenting a limited number of key findings and practical recommendations for clubs, federations, employers, education providers and policymakers.

11.2.2 WP3 – Digital skills inventory and competency framework

The survey provides initial indications of the competence areas that may need to be represented in the digital skills inventory and competency framework. It does not, however, provide a complete occupational mapping or establish the competence required for every role. The initial areas should therefore be tested, refined and mapped to roles and responsibility levels through the additional WP3 research, interviews and stakeholder consultation.

The findings suggest that the framework could include:

- capabilities for assessing unfamiliar technologies, identifying organisational needs and selecting suitable tools, reflecting the reported difficulties with tool selection;
- capabilities associated with administration, communication, marketing, participant management and digital content, reflecting the areas in which technology is already widely used;
- organisational data management, data protection and cybersecurity, reflecting both their reported importance and the questions about how consistently they are embedded in practice;
- responsible use of artificial intelligence, including critical evaluation, data protection and human oversight, reflecting uncertainty about the maturity of current AI use;
- implementation-related capabilities, including system integration and adapting working practices, reflecting the challenges experienced by organisations; and

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- more advanced capabilities in data analysis, automation, AI, system integration and specialised sport technologies where these are relevant to particular roles.

The findings also support including transversal capacities such as critical thinking, adaptability, problem-solving, continued learning and change management. These appear particularly relevant because organisations must assess unfamiliar technologies and adapt as tools and working practices evolve.

The framework should map competences to relevant sport roles and functions and distinguish different levels of occupational responsibility. It could also differentiate between:

- foundational capabilities relevant across many roles;
- capabilities associated with particular organisational functions; and
- advanced or specialised capabilities required only in particular contexts.

The survey indicates that organisational context and digital maturity affect support needs. The WP3 consultation should therefore test the relevance of the proposed competences across grassroots and volunteer-led organisations, larger employers and more specialised sport settings.

The resulting inventory and framework should provide the evidence-based connection between the WP2 findings and the selection of priorities for WP4.

11.2.3 WP4 – Online training modules

The survey should inform the priorities, structure and accessibility of the WP4 training rather than determine a detailed curriculum. The final content and learning outcomes should follow from the WP3 competence framework and further stakeholder validation.

The findings support a differentiated training structure potentially comprising of various “levels”:

- a foundational level, including the assessment and selection of tools, digital content, organisational data, data protection and cybersecurity;
- applied level connecting digital competence to administration, communication, marketing, participant management, events and other areas of sport work; and
- advanced or specialised content covering areas such as analytics, automation, AI, system integration and relevant sport technologies.

This structure reflects the wide variation in reported technology use and digital maturity. It would enable less digitally mature organisations to begin with foundational capabilities while allowing more advanced organisations and specialist roles to access relevant higher-level content.

The survey also suggests several points of emphasis:

- Because familiar technologies are already widely used, the training could help participants use existing tools more effectively and purposefully, rather than focusing only on adopting new technologies.
- Because organisations reported difficulties selecting tools, integrating systems and changing practices, training could combine technical content with practical guidance on adoption and implementation.
- Because reported benefits remain predominantly operational, practical examples could show how technology can support clearly defined organisational or sport-related objectives.
- Because coaching and performance technologies were less widely used and prioritised, specialised training in this area could be based on the findings of the planned consultation with relevant practitioners.

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Commonly used productivity, communication, design and AI tools such as Microsoft 365 and Teams, Canva and widely used artificial intelligence assistant may be used as practical examples where appropriate. However, the learning should remain transferable and should not depend exclusively on individual commercial products.

The survey findings also have implications for delivery. Smaller, local, volunteer-led and less digitally mature organisations were less likely to report access to current training or support. Provision for these groups should therefore be concise, flexible, clearly written and easy to access. An online-first, modular model combining self-paced learning with practical examples, concise guides and selected live support would reflect respondents' stated preferences.

Training alone is unlikely to address all the barriers identified through the survey. Limited time, financial resources, staff or volunteer capacity and implementation difficulties should be taken into account when designing the modules and accompanying resources.

12. Annexes

12.1 Full survey questionnaire (English)

European Survey on Digitalisation in the Sport Sector

Dear Colleague,

This survey examines the use of digital tools and technologies in sport organisations, their impact on the functioning of organisations, and the implications for skills, training and workforce development. It is part of an EU-funded **TechSportKit** project (led by the European Association of Sport Employers - EASE)

In this survey, "digital tools and technologies" refers to any software or digital system used to support your organisation's activities, such as administration, communication, sport operations, coaching, events, or data management. This includes both basic tools (e.g. email or spreadsheets) and more advanced solutions (e.g. specialised systems or AI tools).

Your participation is essential to help us better understand how digitalisation is transforming the sport sector and its workforce across Europe.

WHY YOUR CONTRIBUTION MATTERS

Through this survey, we aim to better understand:

- How sport organisations perceive and use digital tools and technologies
- The benefits, opportunities and challenges associated with digitalisation
- The digital skills needs and training priorities across the sector.

Your responses will contribute to the development of evidence-based recommendations, training initiatives and policy actions to strengthen the sport workforce (paid staff and volunteers) and support sport organisations in their digital transition.

The questionnaire takes approximately 12 minutes to complete and mainly consists of tick-box questions.

CONFIDENTIALITY AND DATA PROTECTION

Your responses will be treated confidentially and analysed anonymously. Results will only be presented in aggregated form and will not allow the identification of individual organisations or respondents.

All data will be handled securely and in compliance with GDPR regulations.

If you choose to share your contact details at the end of the survey, they will only be used to share the results of the study or contact you regarding potential good practices, case studies or relevant future project activities.

For any questions or support, please contact the coordinator of the survey the European Observatoire of Sport and Employment (EOSE) at eosesec@eose.org.

THANK YOU FOR YOUR SUPPORT

On behalf of the TechSportKit project partnership,
European Observatoire of Sport and Employment


EASE
European Association of Sport Employers
eose
EUROPEAN OBSERVATOIRE OF SPORT AND EMPLOYMENT
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SPORT WERK
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ABOUT YOUR ORGANISATION

* 1. In which country is your organisation registered?

* 2. Please choose the option that best describes your organisation:

- ◯ Sport club
- ◯ Sport federation
- ◯ Sport body (e.g. National Olympic Committee, Paralympic Committee, sport confederation)
- ◯ Fitness club
- ◯ Outdoor activity provider (e.g. ski schools, recreation activity companies)
- ◯ Sport facility operator (e.g. swimming pool, sport hall, stadium operator)
- ◯ Other (please specify)

3. Which sport(s) does your organisation cover? Tick all that apply.

- [ ] Aikido
- [ ] American Football
- [ ] Aquatics (incl. swimming, diving, artistic swimming, open water)
- [ ] Archery
- [ ] Athletics
- [ ] Badminton
- [ ] Baseball
- [ ] Basketball (incl. 3x3)
- [ ] Biathlon
- [ ] Billiards
- [ ] Bobsleigh and skeleton
- [ ] Boules
- [ ] Bowling
- [ ] Boxing
- [ ] Bridge
- [ ] Canoe / Kayak (incl. stand-up paddle)
- [ ] Chess
- [ ] Climbing
- [ ] Cricket
- [ ] Curling
- [ ] Cycling
- [ ] Dance
- [ ] Darts
- [ ] Equestrian
- [ ] Fencing
- [ ] Field Hockey
- [ ] Fishing
- [ ] Floorball
- [ ] Flying Disc
- [ ] Football
- [ ] Futsal
- [ ] Golf
- [ ] Gymnastics (incl. artistic, rhythmic, trampoline)
- [ ] Handball
- [ ] Ice Hockey
- [ ] Ice Skating (incl. figure, speed, short track)
- [ ] Judo
- [ ] Ju-Jitsu
- [ ] Karate
- [ ] Kendo
- [ ] Kickboxing / Muay Thai
- [ ] Lacrosse
- [ ] Luge
- [ ] Modern Pentathlon
- [ ] Motor sports (incl. automobile and motorcycling)
- [ ] Netball
- [ ] Orienteering
- [ ] Padel
- [ ] Parachuting
- [ ] Pickleball
- [ ] Roller Skating
- [ ] Rowing
- [ ] Rugby League (Rugby XIII)
- [ ] Rugby Sevens
- [ ] Rugby Union (Rugby XV)
- [ ] Sailing (incl. windsurfing, kiteboarding)
- [ ] Savate
- [ ] Shooting
- [ ] Skateboarding
- [ ] Skiing and snow sports (incl. alpine, cross-country, freestyle, snowboard, ski jumping)
- [ ] Softball
- [ ] Squash
- [ ] Surfing
- [ ] Table Tennis
- [ ] Taekwondo
- [ ] Tennis
- [ ] Trail running
- [ ] Triathlon
- [ ] Underwater Sports
- [ ] Volleyball (incl. Beach Volleyball)
- [ ] Water Polo
- [ ] Water Skiing
- [ ] Weightlifting
- [ ] Wrestling
- [ ] Wushu / Kung Fu
- [ ] Yoga
- [ ] Other (please specify)

4. Which of the following best describes your organisation?

- ( ) Not for profit, voluntary, or charitable organisation
- ( ) Public organisation
- ( ) Commercial organisation (private, for profit)

5. What is the main geographical scope of your organisation's activities?

- ◯ Local
- ◯ Regional
- ◯ National
- ◯ European
- ◯ International

6. What is the main focus of your organisation? Tick all that apply.

- ☐ Leisure sport / Mass participation
- ☐ Competitive sport / Performance sport
- ☐ Using sport for social inclusion / social impact
- ☐ Sport for people with disabilities
- ☐ Health enhancement / wellbeing
- ☐ Other (please specify)

7. Approximately, can you please indicate the total size of your organisation's workforce?

- ◯ No paid staff or volunteers
- ◯ 1 to 4 paid staff / volunteers
- ◯ 5 to 9 paid staff / volunteers
- ◯ 10 to 19 paid staff / volunteers
- ◯ 20 to 49 paid staff / volunteers
- ◯ 50 to 99 paid staff / volunteers
- ◯ 100 to 199 paid staff / volunteers
- ◯ 200 or more paid staff / volunteers

8. How would you describe the balance between paid staff and volunteers in your organisation?

- ◯ Only paid staff
- ◯ More paid staff than volunteers
- ◯ About an equal proportion of paid staff and volunteers
- ◯ More volunteers than paid staff
- ◯ Only volunteers

ABOUT YOUR ORGANISATION

* 9. Which of the following activities are part of your organisation's regular operations? Select all that apply.

- [ ] Administration and organisational management (e.g. finance, HR, general administration)
- [ ] Internal communication and collaboration (e.g. communication between staff)
- [ ] Sport services management (e.g. memberships, bookings, client management, e-commerce)
- [ ] Coaching or training of sport participants
- [ ] Organisation of events or competitions
- [ ] Management and maintenance of sport facilities
- [ ] Marketing and promotion (e.g. campaigns, social media, branding)
- [ ] Research, data collection, reporting or analysis (e.g. databases, surveys)
- [ ] Digital infrastructure and security
- [ ] None of the above

PERCEPTIONS ABOUT DIGITALISATION IN SPORT

The following statements relate to your personal perceptions and opinions about digitalisation in the sport sector.

10. Please indicate your level of agreement with the following statements.

	1 - Strongly disagree	2	3	4	5 - Strongly agree
Digital tools and technologies are becoming essential for the effective management and functioning of sport organisations	○	○	○	○	○
Digitalisation can significantly improve the efficiency and organisation of sport activities and services	○	○	○	○	○
Digitalisation will significantly transform how sport organisations operate in the coming years	○	○	○	○	○
Digital tools and technologies improve communication and engagement with athletes, members, volunteers and partners	○	○	○	○	○
The level of digitalisation varies greatly between sport organisations	○	○	○	○	○
There is currently a lack of relevant training opportunities on digital tools and technologies for the sport workforce	○	○	○	○	○
Many sport organisations lack the digital skills needed to fully benefit from digital tools and technologies	○	○	○	○	○
Artificial intelligence (AI) has the potential to improve how sport organisations operate	○	○	○	○	○

PERCEPTIONS ABOUT DIGITALISATION IN YOUR ORGANISATION

The following statements relate to your personal perceptions and opinions about digitalisation in your organisation.

11. Please indicate your level of agreement with the following statements.

	1 - Strongly disagree	2	3	4	5 - Strongly agree
Within my organisation, digital tools and technologies contribute to improving the efficiency of day-to-day operations	○	○	○	○	○
Staff and volunteers in my organisation have the necessary digital skills to perform their roles effectively	○	○	○	○	○
In my organisation, additional training in digital tools and technologies is needed for staff and volunteers	○	○	○	○	○
In my organisation, the next generation of staff and volunteers will need strong digital skills to perform their roles effectively	○	○	○	○	○
Within my organisation, the level of use of digital tools and technologies varies depending on the age of staff and volunteers	○	○	○	○	○
In my organisation, data protection, cybersecurity and the responsible use of digital technologies are important priorities	○	○	○	○	○
In my organisation, investment in digital tools, technologies and digital skills is becoming a strategic priority	○	○	○	○	○

DIGITALISATION IN YOUR ORGANISATION

The following questions relate to the use of digital tools and technologies within your organisation. Please answer based on the practices and situation of your organisation.

* 12. How would you describe your organisation's level of digitalisation compared to similar organisations in your sport or country?

- ◯ Very low
- ◯ Below average
- ◯ About average
- ◯ Above average
- ◯ Very advanced

13. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Administration and organisational management

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	*N/A to my organisation*
Project management and planning applications (other than spreadsheet)	◯	◯	◯	◯	◯
Accounting or financial management software (other than spreadsheet)	◯	◯	◯	◯	◯
Digital fundraising platforms or tools	◯	◯	◯	◯	◯
Human Resources management tools *(e.g. for recruitment, staff management, performance review, employee benefits)*	◯	◯	◯	◯	◯
Automation of administrative tasks *(e.g. scheduling, controlling tasks)*	◯	◯	◯	◯	◯
Using AI / Large Language Models for administration and management *(e.g. ChatGPT, Claude, Gemini)*	◯	◯	◯	◯	◯

14. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Internal communication and collaboration

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	*N/A to my organisation*
Collaboration platforms (e.g. Teams, Slack, Discord)	◯	◯	◯	◯	◯
Cloud storage systems (e.g. SharePoint, Google Drive, Microsoft OneDrive, iCloud Drive, Dropbox)	◯	◯	◯	◯	◯

15. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Sport services management

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	*N/A to my organisation*
Membership management systems (e.g. member registration, subscriptions, databases)	○	○	○	○	○
Participant management systems (e.g. athlete licensing, rankings, competition participation)	○	○	○	○	○
Client or customer management systems (e.g. booking and registration systems)	○	○	○	○	○
Community building software	○	○	○	○	○
Digital membership cards	○	○	○	○	○
E-commerce (online shop)	○	○	○	○	○
Predictive analytics of sport services	○	○	○	○	○
Automation of management of sport services	○	○	○	○	○
Using AI / Large Language Models for management of sport services (e.g. ChatGPT, Claude, Gemini)	○	○	○	○	○
Own bespoke software or hardware used for sport services	○	○	○	○	○

16. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Coaching or training of sport participants

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	*N/A to my organisation*
Training planning tools (e.g. session planning, training programmes, workload management)	○	○	○	○	○
Online coaching	○	○	○	○	○
Athlete monitoring, performance analysis or biomechanical tools (e.g. GPS tracking, video analysis, movement or performance tracking, Internet of Things IoT devices, sensors, trackers, drones, biomedical data)	○	○	○	○	○
Virtual Reality / Augmented Reality hardware for sport operations	○	○	○	○	○
Using AI / Large Language Models for coaching and training	○	○	○	○	○

17. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Organisation of events or competitions

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	*N/A to my organisation*
Ticketing software	○	○	○	○	○
Broadcasting technology (e.g. new media formats)	○	○	○	○	○
Officiating assistance (e.g. video, VAR)	○	○	○	○	○

18. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Management and maintenance of sport facilities

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	*N/A to my organisation*
Facility booking systems	○	○	○	○	○
Security / access to facilities (e.g. automated)	○	○	○	○	○
Smart facility management technologies (e.g. pool water monitoring, energy management, sensors, IoT - remote control of facilities, CCTV monitoring)	○	○	○	○	○

19. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Marketing and promotion

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	*N/A to my organisation*
Social media platforms (e.g. Facebook, Instagram, TikTok, X)	○	○	○	○	○
Fan engagement solutions (e.g. profiling, targeting, personalisation)	○	○	○	○	○
Digital content creation tools (non-AI, e.g. design tools for flyers, graphics or videos)	○	○	○	○	○
AI tools for content creation (e.g. generating text, images)	○	○	○	○	○
Automated content production and distribution (automations, AI agents)	○	○	○	○	○
Advanced communication performance data gathering and analysis (e.g. website usage, social media)	○	○	○	○	○

20. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Research, data collection, reporting or analysis

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	*N/A to my organisation*
Online survey or research tools (e.g. customer satisfaction)	○	○	○	○	○
Data analysis or reporting tools (non-social media analytics)	○	○	○	○	○

21. Please indicate the level of use of the following digital tools and technologies in your organisation in the area of Digital infrastructure and security

	Not used and not planned	Not used but planned	Used occasionally	Used extensively	N/A to my organisation
Managing smartphones, computers, tablets, IT systems, devices, networking	○	○	○	○	○
Integrating existing software solutions	○	○	○	○	○
Cybersecurity tools and policy (e.g. spam filtering, virus protection, secure websites, procedures, monitoring, notification system)	○	○	○	○	○

DIGITALISATION IN YOUR ORGANISATION

* 22. In which areas would increased or improved use of digital tools bring the greatest value to your organisation? Select up to 3.

- [ ] Administration and organisational management (e.g. finance, HR, general administration)
- [ ] Internal communication and collaboration (e.g. communication between staff)
- [ ] Sport services management (e.g. memberships, bookings, client management, e-commerce)
- [ ] Coaching or training of sport participants
- [ ] Organisation of events or competitions
- [ ] Management and maintenance of sport facilities
- [ ] Marketing and promotion (e.g. campaigns, social media, branding)
- [ ] Research, data collection, reporting or analysis (e.g. databases, surveys)
- [ ] Digital infrastructure and security
- [ ] None of the above

EXPERIENCED BENEFITS OF DIGITALISATION

The following questions aim to understand how digital tools and technologies affect your organisation.

* 23. What are the main factors influencing your organisation's decisions to use digital tools and technologies? Select up to 5.

- [ ] The sport sector is becoming more digital
- [ ] We want to remain competitive
- [ ] Expectations from members, athletes or clients
- [ ] Requirements from federations, governing bodies or competition organisers
- [ ] Desire to modernise the organisation
- [ ] Interest in innovation within the organisation
- [ ] Availability of funding or external support for digitalisation
- [ ] Opportunities created by new digital technologies
- [ ] None of the above

* 24. What main benefits has digitalisation brought to your organisation? Select up to 5.

- [ ] Time savings
- [ ] Increased operational efficiency
- [ ] Reduced operational costs
- [ ] Improved communication (with athletes, members, staff)
- [ ] Better internal collaboration and teamwork
- [ ] Improved access to data and information
- [ ] Better decision making
- [ ] Improved promotion and visibility of our organisation
- [ ] Improved organisation image and media appearance
- [ ] Enhanced partnerships and sponsorship opportunities
- [ ] Improved athlete monitoring or performance analysis
- [ ] Improved athlete performance / results
- [ ] Development of new services or activities
- [ ] Increased revenue (e.g. new revenue streams, higher value)
- [ ] Improved working conditions for staff or volunteers
- [ ] No significant benefits observed

EXPERIENCED CHALLENGES OF DIGITALISATION

* 25. What main challenges has your organisation experienced when implementing or using digital tools and technologies? Select up to 5.

- [ ] Lack of digital skills among staff or volunteers
- [ ] Lack of financial resources
- [ ] High costs of implementation, maintenance or upgrades
- [ ] Lack of time to implement and use digital tools effectively
- [ ] Limited organisational capacity to focus on digitalisation (staff, structure, processes)
- [ ] Difficulty identifying appropriate tools or technologies
- [ ] Difficulty integrating new tools with existing systems
- [ ] Data protection or cybersecurity concerns
- [ ] Resistance to change within the organisation
- [ ] Limited availability of training opportunities
- [ ] Poor quality or relevance of digital content / tools
- [ ] Tools or solutions fragmentation (too many tools / solutions not integrated)
- [ ] Limited access to appropriate hardware or infrastructure
- [ ] Lack of training opportunities
- [ ] Over reliance on digital tools and technologies
- [ ] No challenges experienced

* 26. What are the main reasons for the limited or no use of digital technologies in your organisation? Select up to 5.

- [ ] Digital tools and technologies are not considered necessary
- [ ] Lack of clear benefits or added value
- [ ] Preference for traditional ways of working
- [ ] Limited awareness of available digital tools and technologies
- [ ] Uncertainty about which tools or technologies to choose
- [ ] Concerns about risks (e.g. data protection, cybersecurity)
- [ ] Concerns about negative impact on organisational culture
- [ ] Concerns about negative impact on organisational image
- [ ] Ethical concerns (e.g. values, sustainability)
- [ ] Uncertainty about artificial intelligence (AI) tools and their use
- [ ] Lack of guidance or support on adopting digital tools and AI
- [ ] Lack of time to learn new tools
- [ ] Lack of digital leadership
- [ ] Lack of organisational resources
- [ ] None of the above

DIGITAL SKILLS IN YOUR ORGANISATION

* 27. How much of a priority is it to improve digital skills in the following areas in your organisation?

	1 - Not a priority	2	3	4	5 - Very high priority
Administration and organisational management (e.g. finance, HR, general administration)	○	○	○	○	○
Internal communication and collaboration (e.g. communication between staff)	○	○	○	○	○
Sport services management (e.g. memberships, bookings, client management, e-commerce)	○	○	○	○	○
Coaching or training of sport participants	○	○	○	○	○
Organisation of events or competitions	○	○	○	○	○
Management and maintenance of sport facilities	○	○	○	○	○
Marketing and promotion (e.g. campaigns, social media, branding)	○	○	○	○	○
Research, data collection, reporting or analysis (e.g. databases, surveys)	○	○	○	○	○
Digital infrastructure and security	○	○	○	○	○

DIGITAL SKILLS IN YOUR ORGANISATION

* 28. Which of the following digital skills should be prioritised for improvement in your organisation? Select up to 5.

- [ ] Learning to use and adopt new digital tools or technologies
- [ ] Finding and evaluating digital information
- [ ] Collecting and managing data (e.g. members, athletes, activities)
- [ ] Protecting data and ensuring cybersecurity (e.g. safe use of systems, data privacy, ownership of biometric data)
- [ ] Analysing data
- [ ] Creating digital content (e.g. documents, visuals, videos, social media, websites)
- [ ] Using artificial intelligence (AI) tools effectively (e.g. ChatGPT, Claude, Gemini)
- [ ] Using artificial intelligence (AI) tools ethically (e.g. considering algorithmic bias in scouting, fairness)
- [ ] Using automation tools
- [ ] No digital skills need improvement

* 29. Which of the following transversal skills should be improved as a priority to support digital transformation in your organisation? Select up to 5.

- [ ] Adaptability and resilience
- [ ] Change management
- [ ] Digital mindset
- [ ] Ethical awareness
- [ ] Leadership
- [ ] Willingness to learn
- [ ] Critical thinking
- [ ] Problem solving
- [ ] No transversal skills need improvement

30. For which digital tools or technologies would your organisation need training or support? Please specify (e.g. names of the tools).

TRAINING NEEDS IN DIGITAL TOOLS AND TECHNOLOGIES

* 31. Does your staff (paid and volunteer) receive training and/or support on digital tools?

- ◯ Yes, all staff
- ◯ Yes, some staff
- ◯ No, but it is planned
- ◯ No

32. Which provider is responsible for the training and/or support? Tick all that apply.

- ☐ Your own organisation
- ☐ Local / regional authority
- ☐ Sport federation (national, European or International)
- ☐ Sport body (e.g. National Olympic Committee, Paralympic Committee, Sport Confederation)
- ☐ Private training provider
- ☐ Digital solution provider
- ☐ University or college
- ☐ Other (please specify)

* 33. How interested would your organisation be in undertaking training and/or receiving support related to digital tools and technologies?

- ◯ Not interested at all
- ◯ Not very interested
- ◯ Quite interested
- ◯ Very interested
- ◯ Do not know

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34. Which training delivery or support format would you prefer for your organisation? Tick all that apply.

- [ ] In-person workshops
- [ ] Online courses
- [ ] Hybrid model (combination of online and in-person)
- [ ] Webinars
- [ ] Mentoring / coaching
- [ ] Peer learning
- [ ] How-to guides (e.g. PDF, booklet)
- [ ] Videos
- [ ] Podcasts
- [ ] Other (please specify)

35. Which type of training schedule or support would be the most suitable for your organisation? Tick all that apply.

- [ ] Short, intensive sessions (e.g. 1–2 days)
- [ ] Long-term development programmes (e.g. over several months)
- [ ] Self-paced, flexible online training
- [ ] Evening or weekend training sessions
- [ ] Blended learning (combination of online and in-person training)
- [ ] On-the-job training (e.g. shadowing) or mentoring programs
- [ ] One-off workshops or training events
- [ ] Other (please specify)

GOOD PRACTICES AND CASE STUDIES

We are interested in identifying examples of good practices in the use of digital tools and technologies in sport organisations.

36. Are you aware of any good practice related to digitalisation in the sport sector that could be shared with the project and other sport organisations?

- ◯ Yes, within our organisation
- ◯ Yes, in another sport organisation
- ◯ No

37. Please describe briefly the good practice you are aware of (e.g. tools, initiatives, projects, results).

38. Can we contact you about the case study if we have further questions?

- ◯ Yes
- ◯ No

YOUR PROFILE

39. What is your gender?

- ◯ Female
- ◯ Male
- ◯ Non-binary
- ◯ Prefer not to say

40. What is your age?

- ◯ Under 30 years of age
- ◯ 31-45 years of age
- ◯ 46-60 years of age
- ◯ 61+ years of age
- ◯ Prefer not to say

41. What is your role / position in the organisation?

- ◯ Senior management (e.g. director, CEO)
- ◯ Board member / leadership role
- ◯ Operational staff / administration
- ◯ Coach / trainer / instructor
- ◯ Other (please specify)

  _____

- ◯ Prefer not to say

42. What is the name of your organisation?

_____

YOUR COMMUNICATION PREFERENCES

We would like to inform you about the results of this survey. With your permission, we may contact you to send you the survey results or other updates on the project and further similar opportunities.

* 43. Please indicate your preference:

- ◯ Yes, I would like to be kept informed about the outcomes of the survey and the project.
- ◯ No thank you, I do not want to be kept informed.

YOUR CONTACT DETAILS

You have indicated that we can contact you about the case study you submitted. Please provide your e-mail address so that we can do so.

You have indicated that you want to be informed about the results of this survey. Please provide your email address.

* 44. What is your e-mail address?

45. What is your name?

All information provided will be treated confidentially and used solely for the purposes of this survey and the project.

THANK YOU

THANK YOU VERY MUCH FOR YOUR TIME AND CONTRIBUTION!

Your input is invaluable to the success of this survey.

All information provided will be treated confidentially and used solely for the purposes of this survey and the project.

If you have any questions or need further information, please feel free to contact us at eosesec@eose.org.

Best regards

The TechSportKit partners

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12.2 Summary of Likert statements

Statement (n=580-616)	Agreement %	Mean Score[3]
Digital tools and technologies are becoming essential for the effective management and functioning of sport organisations	88.1	1.49
Digitalisation can significantly improve the efficiency and organisation of sport activities and services	86.4	1.42
The level of digitalisation varies greatly between sport organisations	82.5	1.34
Digital tools and technologies improve communication and engagement with athletes, members, volunteers and partners	79	1.22
Digitalisation will significantly transform how sport organisations operate in the coming years	75.2	1.15
Within my organisation, digital tools and technologies contribute to improving the efficiency of day-to-day operations	75.1	1.08
In my organisation, the next generation of staff and volunteers will need strong digital skills to perform their roles effectively	73.7	0.98
Many sport organisations lack the digital skills needed to fully benefit from digital tools and technologies	73	1.08
In my organisation, additional training in digital tools and technologies is needed for staff and volunteers	68	0.89
Within my organisation, the level of use of digital tools and technologies varies depending on the age of staff and volunteers	67.2	0.82
Artificial intelligence (AI) has the potential to improve how sport organisations operate	66.7	0.88
In my organisation, data protection, cybersecurity and the responsible use of digital technologies are important priorities	61.8	0.84
There is currently a lack of relevant training opportunities on digital tools and technologies for the sport workforce	56.2	0.7
In my organisation, investment in digital tools, technologies and digital skills is becoming a strategic priority	48.7	0.39
Staff and volunteers in my organisation have the necessary digital skills to perform their roles effectively	34.6	0.16

Table 5 – Views on digitalisation in the sector and in respondents' organisations – all statements sorted by agreement percentage

[3] Mean Score calculation: Strongly disagree = -2, Disagree = -1, Neither agree nor disagree = 0, Agree = 1, Strongly agree = 2

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12.3 List of tools by area with sophistication level

Area	Question-row	Tool	Sophistication level
Administration and organisational management	Q13-1	Project management and planning applications (other than spreadsheet)	Basic
	Q13-2	Accounting or financial management software (other than spreadsheet)	Basic
	Q13-3	Digital fundraising platforms or tools	Intermediate
	Q13-4	Human Resources management tools (e.g. for recruitment, staff management, performance review, employee benefits)	Intermediate
	Q13-5	Automation of administrative tasks (e.g. scheduling, controlling tasks)	Advanced
	Q13-6	Using AI / Large Language Models for administration and management (e.g. ChatGPT, Claude, Gemini)	Advanced
Internal communication and collaboration	Q14-1	Collaboration platforms (e.g. Teams, Slack, Discord)	Basic
	Q14-2	Cloud storage systems (e.g. SharePoint, Google Drive, Microsoft OneDrive, iCloud Drive, Dropbox)	Basic
Sport services management	Q15-1	Membership management systems (e.g. member registration, subscriptions, databases)	Basic
	Q15-2	Participant management systems (e.g. athlete licensing, rankings, competition participation)	Intermediate
	Q15-3	Client or customer management systems (e.g. booking and registration systems)	Basic
	Q15-4	Community building software	Intermediate
	Q15-5	Digital membership cards	Intermediate
	Q15-6	E-commerce (online shop)	Intermediate
	Q15-7	Predictive analytics of sport services	Advanced
	Q15-8	Automation of management of sport services	Advanced
	Q15-9	Using AI / Large Language Models for management of sport services (e.g. ChatGPT, Claude, Gemini)	Advanced
	Q15-10	Own bespoke software or hardware used for sport services	Advanced
Coaching or training	Q16-1	Training planning tools (e.g. session planning, training programmes, workload management)	Basic
	Q16-2	Online coaching	Basic
	Q16-3	Athlete monitoring, performance analysis or biomechanical tools (e.g. GPS tracking, video analysis, movement or performance tracking, Internet of Things IoT devices, sensors, trackers, drones, biomedical data)	Advanced
	Q16-4	Virtual Reality / Augmented Reality hardware for sport operations	Advanced
	Q16-5	Using AI / Large Language Models for coaching and training	Advanced
Events or competitions	Q17-1	Ticketing software	Basic
	Q17-2	Broadcasting technology (e.g. new media formats)	Intermediate
	Q17-3	Officiating assistance (e.g. video, VAR)	Advanced
Sport facilities	Q18-1	Facility booking systems	Basic
	Q18-2	Security / access to facilities (e.g. automated)	Intermediate

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Area	Question-row	Tool	Sophistication level
	Q18-3	Smart facility management technologies (e.g. pool water monitoring, energy management, sensors, IoT - remote control of facilities, CCTV monitoring)	Advanced
Marketing and promotion	Q19-1	Social media platforms (e.g. Facebook, Instagram, TikTok, X)	Basic
	Q19-2	Fan engagement solutions (e.g. profiling, targeting, personalisation)	Intermediate
	Q19-3	Digital content creation tools (non-AI, e.g. design tools for flyers, graphics or videos)	Basic
	Q19-4	AI tools for content creation (e.g. generating text, images)	Advanced
	Q19-5	Automated content production and distribution (automations, AI agents)	Advanced
	Q19-6	Advanced communication performance data gathering and analysis (e.g. website usage, social media)	Intermediate
Research, data and reporting	Q20-1	Online survey or research tools (e.g. customer satisfaction)	Basic
	Q20-2	Data analysis or reporting tools (non-social media analytics)	Intermediate
Digital infrastructure and security	Q21-1	Managing smartphones, computers, tablets, IT systems, devices, networking	Basic
	Q21-2	Integrating existing software solutions	Intermediate
	Q21-3	Cybersecurity tools and policy (e.g. spam filtering, virus protection, secure websites, procedures, monitoring, notification system)	Intermediate

Table 6 – List of digital tools and technologies

12.4 Potential questions to include in upcoming research activities

Technology use and organisational benefits

- Why are digital technologies used predominantly for administration, communication, marketing and participant management?
- Why are benefits such as better decision-making, new services, increased revenue and improved athlete performance reported less frequently?
- Does this reflect the technologies being used, the purposes for which they were adopted, limited implementation capacity, or difficulty recognising and measuring wider benefits?
- What examples exist of organisations achieving more strategic or developmental benefits from digital technologies?
- How do organisations determine whether a technology has delivered the expected benefits?

Strategy, leadership and organisational readiness

- Why does recognition of the importance of digitalisation not always translate into investment or strategic priority?
- Who is responsible for digital strategy and technology decisions within different types of sport organisation?
- What organisational conditions enable digitalisation to become a sustained priority?
- How do leadership, governance, organisational culture, financial resources, staff capacity and volunteer capacity affect implementation?

Effects on job roles and future workforce needs

- Which tasks have already been changed, supported or automated by digital technologies?
- Which occupational roles are experiencing the greatest changes, and how do these changes differ across administration, management, communication, marketing, events, and coaching?
- Are technologies primarily replacing tasks, augmenting existing roles or creating new responsibilities and occupations?
- How are digitalisation and automation affecting volunteers as well as paid staff?
- Which technologies are expected to have the greatest workforce impact over the next three to five years?
- What new responsibilities or job roles are likely to emerge?
- Which digital and transversal competences will be needed at different occupational and responsibility levels?
- What forms of upskilling or reskilling will be required to help existing staff and volunteers adapt?

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Coaching, athlete development and performance technologies

- Does the lower reported use of coaching and performance technologies reflect limited relevance, high cost, lack of expertise, the profile of survey respondents or other barriers?
- Which technologies are currently being used by coaches, performance staff and athletes, and for what purposes?
- Where could these technologies create genuine value, and for which types and levels of sport organisation?
- What knowledge, skills, infrastructure and resources are required for their effective use?

Selection, integration and organisational change

- What difficulties do organisations experience when identifying and selecting digital tools?
- What information or support do they use when comparing available solutions?
- What causes difficulties with system integration and interoperability?
- How do organisations adapt roles, responsibilities and working practices when introducing new technologies?
- What implementation support would be most valuable, particularly for organisations with limited staff, time or technical expertise?

Artificial intelligence

- What does reported AI use involve in practice: occasional experimentation, individual use or organisation-wide implementation?
- Which AI use cases are already creating value for sport organisations?
- How is AI changing tasks, responsibilities and skill requirements?
- How do organisations assess the accuracy, reliability and suitability of AI-generated outputs?
- What arrangements exist for protecting data, ensuring human oversight and managing legal or ethical responsibilities?

Data protection and cybersecurity

- Why is data protection and cybersecurity considered important while digital infrastructure and security appear less frequently as regular operational responsibilities?
- Who is responsible for these matters in different types of organisation?
- Does the apparent difference reflect limited capability, unclear responsibility, lack of resources or differences in how the terminology is understood?
- What risks are organisations encountering, and what practical knowledge or support do staff and volunteers require?