

Impulse Quarterly.

September 2020



**SPORTS BUSINESS
CLUB** at the University of St. Gallen



EDITION #2
September 2020

ABOUT IMPULSE QUARTERLY.

Through the Impulse Quarterly, which is published four times a year by the Sports Business Club at the University of St. Gallen, we take the intergenerational dialogue beyond one roof. Through various content pieces from the industry as well as the next generation, our goal is to provide an overview of current relevant challenges in the industry and thoughts of current and future leaders.

Additionally, the magazine includes updates on our team, upcoming events and activities by the Sports Business Club.

With the insights, we aim to spark new discussions in your day-to-day business.

Sports Business Club, 2020

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PLANS FOR THE FUTURE.

WHAT'S NEW

In 2020, our intergenerational exchange will take place online in the framework of the Impulse Week 2020 from 26. - 30. October. With a view to our goal of establishing an independent, sustainable and innovative discussion platform for the future of sport, preparations are already in full swing for the next physical edition of our conference on the 28. - 29. October 2021 in Rorschach.



The Collaboration Imperative

We, the next generation, invite sports industry leaders for discussion. Inconsistencies, inadequacies, and contradictions – especially at the crossroad between commercial activities and non-profit – have exposed the fragility of the sports ecosystem amidst this global pandemic. With courage, idealism, and great energy to shape the future state of the world, young people raising their voices have been a **powerful seismograph** for shifts in how we live and think. On a global and local scale, the world of sports convulses after a crisis underlining the urgency for political, economic, and social **disruption in the industry** – An ecosystem, which long time assumed to be resilient to external crisis. Now, decision-makers in the sports industry find themselves at a **historic crossroads** between managing short-term pressures against medium- and long-term uncertainties.

We understand the current crisis as the entry into a unique window of **opportunity**. It's a chance for all those determining the future of European Sports to **re-think the current system**. For this, there is a **need for analysis and a change** of perspective. Driven by our passion for sports, we, **20 students from the University of St. Gallen**, are volunteering our time to sustainably promote an open discussion culture in sports. As a student-initiative at one of the **leading universities** in Europe, we see ourselves in a unique position to provide a truly independent and trustworthy

platform in a world marked by a loss of trust and diverging stakeholder-interests. For the third consecutive year, we are committed to bringing together **200 top-executives** in and outside the industry and **100 young talents** at the Impulse Summit. Those talents will be students selected in an international competition based on their previous experience and their ability for solution-oriented **critical thinking**. As **Challengers**, they have the role to be **curious and hash out their visions and standpoints** for the future to **foster serendipity**.

This year's leitmotiv for our participant field led by top-executives is "**the collaboration imperative**". In the discourse with our trusted community of industry experts, the need for stakeholders to collaborate has proven to be key in the future. To face the complex challenges ahead, stakeholders will have to overcome competitive self-interests, lack of fully shared purpose, and a shortage of trust. With our interactive setting, we want to inspire sports organisations, the public sector, corporates, investors, academia, NGOs, and participate in the development of collaborative solutions to systemic problems and develop sustainable **business models with societal and economic benefits**. Because the corona storm will pass. But the desire to shape the future of sports will continue to fuel student's engagement for years to come.

#changingperspectives

PLANS FOR THE FUTURE.

TAKING THE DIALOGUE ONLINE.

Based on the current developments in Europe, as well as university guidelines, the Sports Business Club has decided to implement the intergenerational exchange in 2020 on a digital level. This enables us to offer more interactivity, internationality and in-depth discussions in our formats.

The sports world paused. No EURO 2020. No Olympia. No fans.

But, more than ever before, one thing has to go on: dialogue and exchange. We are not giving up. Within the framework of the Impulse Week, we set ourselves the goal of working on the questions of our narrative 'The Collaboration Imperative' in digital form with an international, intergenerational, and interdisciplinary field of participants.



Decision for digital implementation.

In 2020 we decide to implement our platform digitally, which offers new opportunities.



Virtual Impulse Sessions as interactive online format.

Just like our analogue formats, our digital implementation is based on one goal: interactivity at eye level.



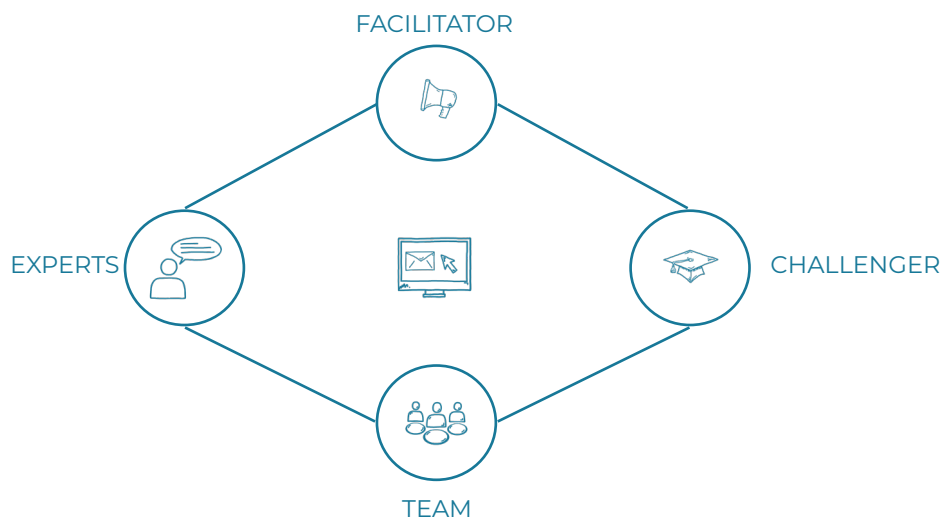
Opportunities of a virtual week.

More internationality.
More innovation.
More perspectives.



Join the discussion.

Learn more on www.impulse.network



10-15 IMPULSE SESSIONS






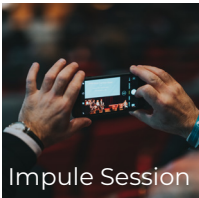


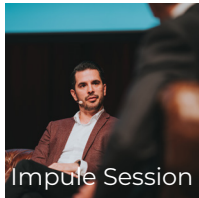

are held within the week to different theses and questions. These sessions are distributed over 5 days.

150+ EXPERTS FROM THE INDUSTRY

will take part in the digital sessions, in the role of a speaker, facilitator or participant.

50+ INTERNATIONAL STUDENTS

will act as challengers in the sessions, representing the view of the next generation as provocateur.

	Monday 26.10	Tuesday 27.10	Wednesday 28.10	Thursday 29.10	Friday 30.10
Morning Session	 Impulse Session	 Impulse Session	 Impulse Session	 Impulse Session	 Impulse Session
Afternoon Session	 Impulse Session	 Impulse Session	 Impulse Session	 Impulse Session	 Impulse Session



BETWEEN OPPORTUNITY AND CRISIS.

AN INTERVIEW WITH
HOLGER HANSEN

Holger Hansen works as Managing Director and Partner at Jung von Matt SPORTS, Europe's most awarded sports marketing agency. His background spans 12+ years of experience in the leading creative agencies in Germany and Spain.

Outside of Jung von Matt SPORTS he's a part-time lecturer at the International School of Management (ISM) in Dortmund where he teaches 'Integrated Marketing' as a part of the master programme 'Strategic Marketing Management'.

Let's start of with some personal questions.

Tea or Coffee?



Bundesliga or NBA?



McDonalds or Burger King?



Favorite day of the week?

Wednesday. Because for me this day is usually packed with sports. My personal gym time in the morning, Champions League or DFB Pokal, sometimes Englische Woche, and usually Werbeliga in the evening. And it's the middle of the week. Meaning it's still enough time to solve challenges and tasks for our clients and projects.

If you could travel back in time, what sports event would you attend?

1992 Summer Olympics In Barcelona. The US Dream Team in Basketball, Carl Lewis, Heike Henkel, Dieter Baumann - these games were full of legendary moments and probably they were one of the last Olympic Games that really helped to totally transform a city for the better.

Interview

Hello Holger, what is the first thing you would like to talk about after the crisis?

How can we use and understand this crisis as an opportunity to change things for the better? I am sure that we as a society, we as companies, as employers, we as employees, and we as a single person now could see what happens when there are stormy times matched with missing leadership, bad governance, or selfish misbehavior. And we could also see what happens to us if there is an idea for how to approach a crisis, when there is a plan considering everybody and leaving no one behind. It would be great to talk about keeping these good things going and what we can do to become a better society.

From a leadership perspective, what is the most important skill to remember in a crisis?

Trust and coolness. I believe that one of the biggest issues during the crisis is the changing and missing parameters. I often heard the phrase “we are driving by sight” and it is true. There were no clear parameters on how to approach a project. There were no clear parameters whether there would be a sports event by the end of the year or not. And there were no clear parameters on what goals should be achieved. Usually, most of the companies value their work by measuring countless KPIs. But these indicators are almost worthless now. Everything was focussed on driving by sight and the biggest goal was to prevent a multiple economic collision. You need to keep a cool head to get through this situation with so many things unclear.

And to approach a situation like that we need a lot of trust. Trust in our strength to overcome unpredictable times. Trust in the strength of our employees. Trust in the sense of responsibility of everyone working in home office. Trust in our government. Trust in our clients to make the right decisions when it comes to the allocation of budgets and trust in science to find a vaccine as soon as possible.

Do you see clear changes for sports marketing that are here to stay?

Our belief is: Once the sports industry understands that sport is more than a business, it can become the best business in the world. What does this mean? After COVID-19 the global sports industry must lead us back to the very roots of sport, to humanitarian values and communities of values. Looking ahead, beyond the crisis, we must harness these values in scrutinizing the organizational structures and business models in sport as a way of bringing economic activity in sport more into context with the major social issues of our time. Sustainability must become more than a shared brand value trumpeted in communications. It must become more systematically connected with the brand equity of sports organizations. This will lead to greater independence and durability. We must make values the cornerstone of our holistic action plans rather than marketing them randomly seeking for visible profit.

What will never be the same in sports?

Never say never. But probably the excessive transfer fees in football will be “limited” for a while, and the relation between the value of a single player and the average worth of a whole league will be more appropriate.

Once the sports industry understands that sport is more than a business, it can become the best business in the world.

Let's move away from the virus for a bit. What is your take on the changes that leagues are taking to adapt (e.g. Champions League, NBA at Disney)? Is this here to stay?

No. I am very sure that these adaptations won't be there in the future. The leagues, the clubs, and some players might be grateful that there is a way to finish the season's in a more or less regular way for this time. But in general, I believe that everyone involved in professional sports will work hard on bringing back the clubs in their home cities, on bringing back the matches in their dedicated stadiums and arenas and on bringing back the fans in their home stands.

Even though most of the fans, club owners and representatives, sponsors, and tv stations are happy to see the sport back in the game, there are also some critical voices of players', e.g. from the NBA that don't really like being in a "bubble" in Florida.

Looking back on your projects with JvM, do you have a personal favorite?

Tipico in Belarus. It's not a doing good project but one that generated attention in the European football community. And it is a project that shows how we think and how we understand our clients, their consumers, and their behavior. During COVID-19, most of the professional football leagues were paused, and there was only one league still playing football: the one in Belarus, streamed and watched by all the heavy bettors in Germany. So we decided one week before the comeback of the Bundesliga to book LED panels in Belarus and remind our customers (that were in digital exile in the Belarus first division) to come back to football in Germany: Die Bundesliga ist zurück. Tipico. An advertising stunt that didn't cost a lot of money but generated attention in social media and was picked up by several football magazines, including the 11Freunde.

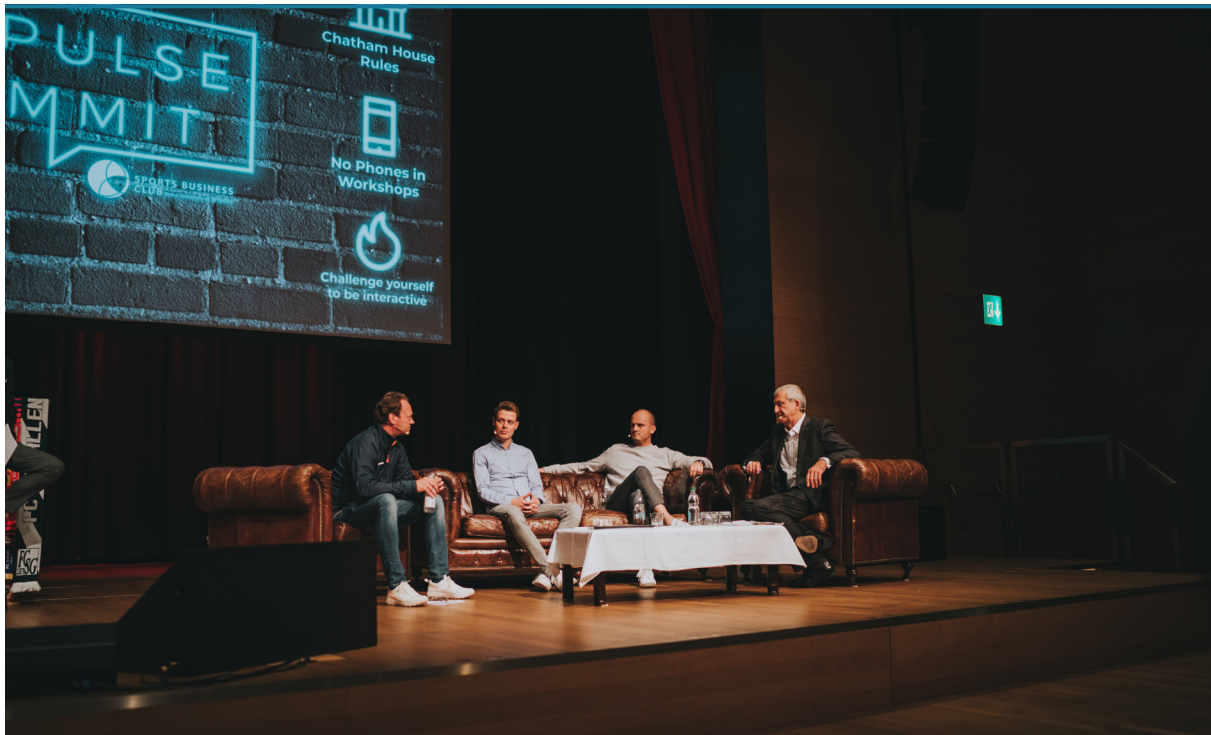
Exciting! And did you have any project ideas during the crisis that you would have liked to realise?

The Faroe Islands and their "Remote Tourism" idea. Like all other countries in the world, the Faroe Islands have felt the impacts of the COVID-19 pandemic. Early on during the global crisis, the Faroe Islands tourism department wondered how they could recreate a Faroe Islands' experience for those who had to cancel or postpone their trip to the Islands – and for everyone else stuck in insolation around the world.

Their idea: they created a new remote tourism tool, the first of its kind. Via a mobile, tablet, or PC, virtual visitors could explore the Faroes' rugged mountains, see close-up our cascading waterfalls and spot the traditional grass-roofed houses by interacting – live – with a local Faroese, who acted as their eyes and body on a virtual exploratory tour. A great idea, based on a strong insight of a human desire and with a digital focus, also climate neutral – so nearly everything in there ;)



The iconic grass-roofed houses on the Faroe Islands.



Many people say that sports are not competing with each other for viewership anymore, but with Netflix, Prime Video or Hulu. How can we make sports more entertaining again?

I don't think that sports will lose its attraction to Netflix, Prime, or Hulu. When it comes to live events, sports is and always will be the biggest player in the business - which also might be a reason why e.g. Amazon and Prime are trying to get more and more into the broadcasting rights for live sports on their platform.

What is a future technology that will revolutionize sports consumption?

I would love to predict that because it would mean that I could be a rich man in the future - but unfortunately it is hard to say. I believe there are a lot of technologies out there that can change the way how we consume sports in the future for example VR or AR. But I also believe that there is a strong desire for people to still hear the genuine sound of raspy speakers, to smell the fresh grass in the stadium, and to stand in line in front of the toilette during half-time. Maybe some things have to remain as they are. Or maybe I am a traditionalist ;)

You have been a panelist at the Impulse Summit for two consecutive years, what topics would you like to challenge in our framework for 2020?

From my point of view, the role of women in sports would be a very interesting topic to talk about. Women were already underrepresented in the sports industry before COVID-19. But as I know, the pandemic caused a much stronger underrepresentation than before. And knowing the fact that women are 50% of the world's population, I believe that we should work on bringing more focus on supporting women becoming part of the sports industry. This relates to a professional environment and the role of women as employees in sports organizations as well as to the sportive environment and the fact that the news coverage of women sports events is much lower than the male counterpart events. A lot of things to do and therefore a lot of things to talk about. And many interesting women in the world of sports have great stories to tell. So let's talk.

Thesis-Challenge

As a last part of our interview, we have collected some theses on the future of sports business and would like to hear your take on them.



Esports will eat second-tier sports' market share.

Yes. Esports revenue is expected to hit \$1.8 billion by 2022. Money flows into esports through media rights, live event ticket sales, merchandise sales, and in-game purchases, and most of the revenue (69%) comes from sponsorships and advertising. The future of esports will likely be powered by mobile, which will further reduce barriers to entry and allow even more gamers and fans to pour in.



Non-exclusive rights will be the new normal.

Hard to say. I don't always understand the urge for exclusive agreements, although there are some rights which for logical reasons must be exclusive. There won't be different equipment agreements for a jersey and one team won't play in Adidas in week one and in Puma in week two. But why shouldn't there be several partners for a car partnership?



Documentaries will replace sports shows and even live-game content for some fans.

No. Live is live and can't be replaced by anything else. If you are really into sports and you like the atmosphere of fans in the stands, of the tension before the game and of unpredictable happenings you do not favour "The Life of Mammals" on BBC over the Super Bowl or a Final Four in Handball.

BACK TO THE SUMMIT

EXPERIENCES FROM IMPULSE SUMMIT 2019
DOMINIQUE SCHNETZER



I have always had great passion for different sports disciplines, however, my heart has always been and probably always will be with ice hockey. I have had the opportunity to dance Rock'n'Roll, do track and field, play soccer, basketball and ice hockey and have now ended up playing floorball in the highest Swiss women's league. This broad background has helped me gain a better understanding of how sports business works on different levels in varying sports.

If you could relive one moment or presentation from the Impulse Summit 2019 again, which one would it be?

My favorite deep-dive session was with Jürg Capol, the Marketing Director of FIS about how to use data more efficiently to grow engagement in creating an ecosystem that truly serves skiing fans. This should then increase fan engagement and open up new commercial opportunities for stakeholders. I really enjoyed this deep-dive session, because I could feel Jürg Capol's passion for skiing and simultaneously also his experience in varying areas of skiing. There was an interesting mix of people present, some more versed in digital and data-driven businesses, others in skiing and a third group in marketing itself. As a result, we had great discussions where many different ideas for opportunities in a digital business strategy for FIS were found.



If you could pick up one topic again to be discussed at the Impulse Summit 2020 what and with whom would it be?

One topic that is connected to the sports business but does not directly influence current but future revenues is about coaches and agents. Without good youth coaches, extraordinary raw talent might never find its way into the professional leagues where sponsors, clubs and sports fans can profit from the hard work the athletes and his or her coaches have done. Holger Geschwindner, a former basketball player who has been Dirk Nowitzki's mentor for a long time, has given us some insights into his special training methods that he has for individual coaching sessions. And agents are just as important in the development of athletes, they are oftentimes important mentors to players when they are far away from home to pursue their dreams and they give important guidance. Therefore, I would love to have a sports agency as well as development or youth national team coaches at the Summit to represent a broader range within the sports business.

If you could give some advice to your younger pre-Summit self, what would it be?

If I could relive the Summit preparation again, I would prepare myself in a different way. I have checked out the participant list which is a great first step and picked out some experts whom I wanted to have a conversation with. In hindsight, I would choose more than only five people to focus on and do extensive research on all of them, so that once you get to talk to them, you are able to have far-reaching conversations rather than just surface-level discussions. The same goes for the keynote speeches or interviews with experts on the main stage, where four challengers could each ask the on-stage expert one question. I had been struggling a bit with finding a great question in the beginning and looking back, I should have asked other challengers for their opinion and possible improvements. Don't be shy and believe that you do not have anything to offer to the experts, you have been chosen from a great number of applicants and everybody has something special that they bring due to their individual backgrounds in the sports business.

BACK TO THE SUMMIT

EXPERIENCES FROM IMPULSE SUMMIT 2019
ELIN MAGYAR



I have always been very involved in sports as I grew up cheering for teams of two nations with my family. Then I went to my first basketball practice in fifth grade and little did I know it would set my path for the next years. I went on being on my high school team as well as my hometown's team and competed in all junior leagues.

If you could relive one moment or presentation from the Impulse Summit 2019 again, which one would it be?

My favorite session was solving the athlete branding case for Jung von Matt with other Challengers on Challenger Day, after learning more about the process that goes on behind the strategy making. After working on the case in teams, we presented our solutions for Sören Jeßen.

If you could pick up one topic again to be discussed at the Impulse Summit 2020 what and with whom would it be?

I would really enjoy diving deeper into the discussion about possibilities that belonging to sports communities bring to children in emerging countries. Several international organizations have been doing work in these countries, and they greatly involve successful athletes who came from there. It is a great opportunity to create more

awareness and give back to those who are the most exposed.

If you could give some advice to your younger pre-Summit self, what would it be?

I would really enjoy diving deeper into the discussion about possibilities that belonging to sports communities bring to children in emerging countries. Several international organizations have been doing work in these countries, and they greatly involve successful athletes who came from there. It is a great opportunity to create more awareness and give back to those who are the most exposed.



BACK TO THE SUMMIT

EXPERIENCES FROM IMPULSE SUMMIT 2019
ALMA ANTONIA BOTTEN



I am simply a sports fanatic. My background in Sports is from soccer, as I used to play professional in the Norwegian Major league soccer (Toppserien) and on the junior national team. As I professional athlete you learn to know sports the real way: Both the ups and the downs. These experiences are certainly what drives and motivates me to engage with sports from a business perspective: To make it fairer, to make it more sustainable, to make it equal and to lift up our dear and important grassroots players.

If you could relive one moment or presentation from the Impulse Summit 2019 again, which one would it be?

I really enjoyed the talk by the German football president, Fritz Keller and Euro 2020 Ambassador, Celia Sasic on the way ahead for German and European football.

If you could pick up one topic again to be discussed at the Impulse Summit 2020 what and with whom would it be?

I would very much like to see someone advocate for the grassroots players of sports. In my opinion the sports ecosystem may in some ways seem to have forgotten its core purpose at times. We need to rethink how we conduct the commercialization of sports, to make sure that we develop values which we honestly believe in and are willing to fight for. Also to get a perspective on sports in the context of Human Rights would be very interesting. ness and give back to those who are the most exposed.

If you could give some advice to your younger pre-Summit self, what would it be?

Be bold, speak up & ask someone to drink a coffee with you ;)



Impulse Quarterly.

THANK YOU.

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www.sportsbusinessclub.com | www.impulse.network



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